Agency Editions

Social media marketing is a demanding business. For an agency that's juggling the needs of different brands and managing social media accounts for multiple clients, it is crucial to choose a tool that will make the job easier. Zoho Social for agencies is designed with these needs in mind.

Customizing Zoho Social

There are a lot of options for customizing the look and feel of Zoho Social. If you're planning to invite your clients to use it, this is a great way to reinforce your agency's branding. You can display your logo throughout the product, upload a Favicon, and create a custom domain your clients can use to access the app.

Custom Domain

Once you've customized your portal, your clients will see a re-branded version of Social. Your branding will be reflected throughout the product.
Before you invite your clients, you can also map a custom domain to the portal. The default domain we provide is yourcompanyname.social-public.com. However, if you don't want to use the default URL, you can navigate to the **Customization** tab under Portal Settings and set up a domain of your own for your Zoho Social portal.

To create a custom domain:

1. Enter the domain you want to set and click **Submit** (e.g., subdomain.yourwebsitename.com). A unique Zoho Social security code (ZS Code) will be generated for your domain.
2. Go to your domain's DNS manager and point the CNAME record and the ZS code to social.cs.zohohost.com.
3. Click **Verify Domain Mapping** to complete the process.

Your custom domain will be ready for your clients in 5-6 business days.

Logo

You can also upload your agency's logo to Zoho Social. If you upload your logo, we'll ensure that the invitations you send to your clients include your branding.

The **Upload your company logo** option can be found in the **Customization** tab under **Portal Settings**. Your logo must be uploaded as a JPEG, JPG, PNG, or GIF, and the file cannot exceed 20KB. To ensure your logo displays properly, we recommend choosing an image that is 200x40 pixels.

Favicons

Favicons are the icons that appear in the address bar or tab of the website you're accessing. You can create a favicon for your agency and have it displayed throughout Zoho Social.

To upload your agency's logo as a favicon:

1. Click the **Settings icon**, then open **Brand Settings**.
2. Under **General Settings**, choose **Portal Settings** and navigate to the Customization tab.
3. Click **Upload Favicon.**
4. Select the image to use and upload it.

If you'd like to edit or delete the favicon you've selected, click "Upload Favicon" again.

Your favicon must be uploaded as a PNG, GOF or ICO, and cannot exceed 20KB. Images would look best if uploaded in 16x16 pixels, or 32x32 pixels.

Inviting Clients

Giving clients limited access to your agency account ensures key stakeholders are aware of and aligned with your agency branding efforts.

Once clients have access, you can use the **Collaborate** tab to tag them in posts and discuss ideas. Your clients can also discuss posts with you from the **Live Stream** or the Posts tab, and start conversations in the **Collaborate** tab.

Clients have limited access within your Brand's Zoho Social, owing to the fact that your Brand may also have internal team discussions and classified information to be shared only among the employees of the organization.

To invite clients to your portal:

1. Click **Brand Members & Roles** under **Settings**.
2. Go to the **Client Members** tab and click the **Invite** button.
3. Enter the client's email address and click **Invite**. If you want to invite more than one person, click **Add More.**

What can your clients access?

Once a client accepts your invitation and is added to your portal, they'll have access to the following screens:

- Home Screen

- Posts
- Collaborate
- Reports

Client users will also be able to view the Live Stream, which shows audience reactions to your posts in real time: what they've liked, shared, or commented on. Clicking any post from the Live Stream will open a pop-up window, where you can see how many times the user has interacted with your brand, reply to them, follow their Profile, or talk about the interaction with your clients or team.
Both the **Collaborate** and **Post** tabs offer a **Discuss** option that clients can use to share their thoughts.

Collaborating with clients

The Collaborate Tab in Zoho Social works as a common space to share information, deliberate on ideas, and come to consensus with your clients.

Your clients will be able to start discussions with you in the Collaborate tab. They can request data, seek clarifications, ask questions, or suggest campaign ideas. Your clients can discuss any posts they see in the Live Stream or in the Posts tab, by clicking the **Discuss** button in the pop-up window when they select the posts.

There may be posts you want to discuss internally with your colleagues. These can be shared directly from the Posts tab. Once you've selected the post you'd like to discuss, click the Discuss button in the pop-up window, and you'll be able to start a conversation in the Collaborate tab linked directly to the post. Items on the Live Stream can also be shared with your team members in the same way.

The threads you start for internal discussions, will not be visible to your clients under the Collaborate tab. If you'd like to involve a client in a discussion, tag them in the post and they'll be able to view the conversation. Do note that if they're tagged in any comment in a conversation, they'll be able to see the entire discussion thread.

Assigning team members to Brands

When you manage social media accounts for multiple clients, you may want to assign your team members to specific Brands, instead of giving all members access to every Brand you manage. Doing this means the members of your team will only see activity and information that relates to the Brand they're working on.

1. Click on Brand Members & Roles under Settings.
2. Go to the All Members section and click Portal Members. You'll see a list of everyone in your team who has access to the portal. Clicking on any user will display the brands they have access to, and their roles in that brand.

To add them to another Brand, click the **+Add** button, select the brands you'd like to invite them to, and click **Invite.**

To remove them from a Brand, hover your mouse over the brand you want to remove them from and click the X that appears next to the brand name.

These actions can be only performed by Brand admins and Portal Admins

Custom Branded Reports

The **Stats and Analytics** feature gives you access to information including the types of posts your audience engages with most or the times they're most active. You can use this data to create better reach for your posts, increasing visibility for the brand you're managing.

The reports you create in this tab won't be visible to your clients unless you share them with them. You can share reports within Zoho Social, or schedule them to send by email at regular intervals.

To create a custom-branded report:

1. From **Reports**, click **Create Custom Report.**
2. Save your new report with a title.
3. Choose the report from **Your Reports**.
4. Click **More** in the top-right corner and choose **Share** report. Select the people you want to share the report with and click **Share.**

- If you'd prefer to email the report, click the Email button, enter the addresses of the people you'd like to send it to and the format to use. You can also add a custom message and decide whether to send yourself a copy.
- Select the **Export** option to send reports in **PDF** or **PNG** formats.
- The option to schedule the emailed report can be found under **More**. Select the recipients, the frequency and the time for the report to be sent.