

CLEARPATH CONSULTING, LLC

Zoho One Implementation & Managed Services

Zoho SalesIQ

Standard Operating Procedures Manual

Visitor tracking, live chat, chatbots (Zia/Answer Bot), triggers, mobile SDK, and support handoff

Prepared for: Jonathan Barber

Date: August 20, 2026

Document version: 1.0 — SalesIQ module (Module 4 of the ClearPath Zoho SOP Library)

Every procedure in this manual is drawn from Zoho's official documentation, cited by chapter under a Sources heading. Passages that could not be independently verified against a stable, dedicated source are flagged in a Verification Note rather than stated as settled fact.

How to Use This Manual

This manual documents ClearPath Consulting's standard method for configuring and operating each area of Zoho SalesIQ. It serves two purposes at once: it is the internal reference ClearPath consultants follow on every engagement, and it is a work sample provided to prospective clients to demonstrate ClearPath's delivery methodology.

Each chapter is organized into numbered sub-sections. Procedures are presented as sequential numbered steps. A green Best Practice box highlights a recommended approach; an orange Common Pitfall box flags a frequent implementation error; a gold Verification Note marks a claim that could not be confirmed against a stable, dedicated Zoho documentation source at the time of writing and should be reconfirmed in the client's live environment before being treated as settled fact. Every chapter closes with a Sources list citing the official Zoho documentation each procedure was drawn from.

Table of Contents

Chapter 1: Getting Started & Widget Installation	5
1.1 Portal, Account, and Brand Structure	5
1.2 Locating and Installing the Embed Script	6
1.3 Platform-Specific Installation Guides	7
1.4 Adding Operators and Assigning Roles	8
1.5 ClearPath Go-Live Checklist	8
Chapter 2: Visitor Tracking & Website Analytics	10
2.1 The Real-Time Visitor List	10
2.2 Visitor Consent, IP Masking, and Data Handling	10
2.3 Lead Scoring Rules	11
2.4 Handoff Checklist for Visitor Tracking	12
Chapter 3: Live Chat Operations	14
3.1 Departments and Chat Routing	14
3.2 Chat Widget and Chat Window Customization	15
3.3 Canned Replies	15
3.4 In-Chat Collaboration Tools	16
3.5 ClearPath Operating Cadence for Live Chat	17
Chapter 4: Triggers & Proactive Engagement	18
4.1 Business Hours Configuration	18
4.2 Intelligent Triggers: Types and Actions	18
4.3 Targeting Conditions and Bot Interactions	19
4.4 Trigger Library Review Discipline	20
Chapter 5: Answer Bot & Zia AI	22
5.1 The Answer Hub: Articles and FAQs	22
5.2 Zobot: The Codeless Bot Builder	23
5.3 Publishing the Zoho Desk Answer Bot Inside SalesIQ	24
5.4 Bot and Article Maintenance Cadence	24
Chapter 6: Mobile SDK & Omnichannel	26
6.1 Mobilisten SDK for Android	26
6.2 Mobilisten for iOS, React Native, and Flutter	26
6.3 WhatsApp Channel Integration	27
6.4 Other Messaging Channels	28
6.5 Omnichannel Operational Considerations	28

Chapter 7: CRM/Desk Integration & Lead Handoff	30
7.1 Zoho CRM Integration Setup	30
7.2 Visitor-to-Lead/Contact Data Sync	30
7.3 Zoho Desk Integration and Ticket Creation	31
7.4 Handoff Reconciliation Check	32
Chapter 8: Reporting, Security & Administration	33
8.1 The Reports Module	33
8.2 Roles, Permissions, and Administration	34
8.3 Data Privacy and GDPR Controls	34
8.4 ClearPath Managed-Services Reporting Rhythm	34

Chapter 1: Getting Started & Widget Installation

Every SalesIQ engagement begins with the same foundation: a properly configured portal, at least one Brand, a live embed script, and operators who can actually see incoming chats. This chapter covers the sequence ClearPath follows on day one of a SalesIQ rollout, from portal creation through to confirming the widget is live on the client's site, and closes with the checklist ClearPath runs before calling an installation complete.

1.1 Portal, Account, and Brand Structure

A Zoho SalesIQ portal is the top-level container for a client's chat operation. Inside a portal, a Brand is the organizational unit that groups a single chat widget configuration, its installation code, its business hours, and its personalization settings. Most small and mid-size clients run a single Brand mapped to their primary website, but any client with multiple distinct properties — for example a corporate site and a separate storefront — should be set up with one Brand per property so that widget appearance, department routing, and reporting stay cleanly separated.

When a portal is first created, SalesIQ automatically generates a default department carrying the same name as the portal itself. ClearPath does not leave this default department in place for production use; it is renamed or replaced with purpose-built departments during the Live Chat Operations phase of the build (Chapter 3). Renaming the default department early avoids confusion later when department-specific routing rules and canned replies are introduced.

ClearPath treats the portal-and-Brand decision as a discovery-phase question rather than a technical afterthought. Before any script is installed, the discovery call with the client should surface how many distinct public-facing properties exist, whether any of them need separate business hours or separate branding, and whether any property is internal-only (an intranet or partner portal, for instance) and therefore a candidate for a Private department rather than a full second Brand. Getting this structure right before installation avoids a costly re-platforming exercise later, since moving an already-live widget from one Brand to another means re-issuing and re-deploying the embed script.

Best Practice: Stand up one Brand per distinct customer-facing property (main site, e-commerce storefront, support portal) even if a single team of operators will staff all of them. This keeps installation code, business hours, and personalization independent, which matters the moment the client wants different chat hours or a different widget color per property.

1.2 Locating and Installing the Embed Script

The tracking/embed script is retrieved from inside the Brand itself, not from a portal-wide settings screen. In the operator console, the path is Settings > Brands > [select the Brand] > Installation > Website. This screen displays the raw JavaScript embed snippet for that Brand and is the canonical source ClearPath copies from on every engagement — never from a cached copy in an old project file, since Zoho occasionally rotates script parameters.

For a standard custom-built or hand-coded website, the snippet is pasted immediately before the closing `</body>` tag (or in the site's global footer include) so that it loads on every page the client wants tracked and chat-enabled. Because the script is asynchronous, its placement does not block page rendering, but ClearPath still verifies load order on a staging environment before pushing to production, particularly on sites that already run a tag manager or several other third-party scripts.

Once installed, verification is not optional. ClearPath's standard check is to open the live (or staging) page in a private/incognito browser window, confirm the widget coin renders in the expected corner, start a test chat from that anonymous session, and confirm the resulting visitor and chat both appear in the operator console within a few seconds. A widget that visually renders but never produces a corresponding entry in the console usually points to a Brand mismatch — the script copied from the wrong Brand, or pasted onto a domain not authorized for that Brand.

Procedure: Retrieve and Install the SalesIQ Embed Script

1. In the SalesIQ operator console, go to Settings > Brands and select the target Brand.
2. Open Installation > Website.
3. Copy the full JavaScript snippet displayed on that screen.
4. Paste the snippet into the site's HTML immediately before the closing `</body>` tag, or into the equivalent global footer include for the site's CMS.
5. Publish/deploy the change to a staging URL first if one is available.
6. Reload the staging page and confirm the chat widget coin renders in the configured corner.
7. Push the change to the production site and confirm the widget loads there as well.
8. From a private browser window, start a test chat and confirm it appears in the operator console under the correct Brand and department.

Common Pitfall: Do not paste the embed script into the <head> without the async/defer behavior Zoho ships by default, and do not hand-edit the snippet to "clean it up." Editing the script can silently break visitor identification or the Brand association, producing a widget that loads but never appears in the operator console's visitor list.

1.3 Platform-Specific Installation Guides

Zoho publishes dedicated installation paths for common platforms rather than requiring every client to hand-edit template files. For WordPress, ClearPath installs the official "Zoho SalesIQ" plugin from the WordPress plugin directory, activates it, and then pastes the WordPress-specific link (copied from the same Settings > Brands > Installation screen) into the new Zoho SalesIQ tab that appears in the WordPress admin sidebar. One documented limitation applies here: SalesIQ's JavaScript APIs are not supported on WordPress sites installed through the plugin, which rules out any custom JS-driven trigger actions or programmatic visitor tagging for that install method.

For sites built on Zoho Sites, installation happens without leaving the Sites builder: inside the site's Settings, under Integrations, the admin locates "Zoho SalesIQ – Live Chat," selects the correct Portal name and Brand, toggles Add Live Chat on, and clicks Connect. The site must then be republished for the widget to go live. Other e-commerce and CMS platforms (WooCommerce and several others) have their own dedicated installation articles in Zoho's knowledge base; ClearPath's practice is to check for a platform-specific guide before defaulting to the raw embed-script method.

Regardless of platform, staying signed in to the SalesIQ operator console (or the mobile app) is what actually delivers chat notifications to a human. The embed script only governs whether the widget is visible to visitors — it does not, by itself, guarantee an operator is watching for incoming chats.

When a client's site is built on a platform without a dedicated Zoho guide, ClearPath falls back to the raw embed-script method described in section 1.2, working with the client's web developer (or the platform's custom-code/embed-widget feature, common to most modern site builders) to place the snippet sitewide. In every case, the platform-specific limitation — such as the WordPress plugin's lack of JS API support — should be documented in the client's project file before Chapter 4's triggers or Chapter 5's Zobot are scoped, since those chapters may depend on capabilities a given install method does not support.

1.4 Adding Operators and Assigning Roles

Operators are added from Settings > General > Operators > Add. Each new operator is invited by email address, assigned one of three roles, associated with one or more departments, and given engagement/call settings before the invitation is sent. SalesIQ ships with exactly three roles, and ClearPath maps client team members to these roles deliberately rather than defaulting everyone to Administrator.

An Administrator has full access: every setting, every department, the ability to add or remove other operators, and the ability to change anyone's role. A Supervisor has a deliberately narrower slice of that power — they can manage websites, automation, and integrations, and they can monitor operator chats and approve IP blocking, but they cannot add new team members or change another operator's role. An Associate is the front-line, chat-facing role: an Associate can connect with and chat with visitors and see their own chat history and personal data, but has no access to administrative settings or portal-wide performance reports.

Administrators also set a per-operator concurrent chat limit using a slider in the operator's profile. Once an operator reaches that limit, their status automatically shifts to "Engaged" and new chats route to the next available operator rather than queuing indefinitely against an already-overloaded agent.

ClearPath's standard practice is to seed the operator roster during the same working session as department creation (Chapter 3), because department assignment happens at the moment an operator is added rather than as a separate later step. Adding operators first and departments second — or vice versa — is not wrong, but doing them in the same session avoids the common gap where a newly added operator sits in no department at all and therefore never receives a routed chat.

Best Practice: Default new hires and seasonal support staff to Associate, and reserve Supervisor for team leads who need visibility into automation and integrations but should not be able to reassign roles. Reserve Administrator for the client's SalesIQ owner and ClearPath's own implementation account — every additional Administrator is one more account that can silently change a live trigger or department.

1.5 ClearPath Go-Live Checklist

Before ClearPath marks a SalesIQ installation phase complete and moves the engagement into Live Chat Operations configuration, the following checklist is run in full and the results recorded in the client's project file. This is ClearPath's own internal quality gate, not a Zoho-documented

procedure, and it exists specifically to catch the installation errors described in sections 1.2 and 1.3 before they surface as a client-facing incident.

Procedure: Widget Installation QA Checklist

1. Confirm the embed script (or platform integration) is live on every page template the client wants tracked, not just the homepage.
2. Confirm the widget renders correctly on both desktop and mobile viewports.
3. Send a test chat from a private browser session and confirm it lands in the operator console under the correct Brand and department.
4. Confirm at least one Administrator and one additional operator can both see the test chat.
5. Confirm the correct operators are associated with the correct departments (Chapter 3).
6. Confirm business hours are configured, even if the client intends to run 24/7 support initially (Chapter 4).
7. Record the Brand name, portal URL, and installation method used in the client's project file for future reference.

Sources

- SalesIQ for WordPress — help.zoho.com/portal/en/kb/salesiq-2-0/installation-guides/articles/wordpressinsalesiq
- SalesIQ for Zoho Sites — help.zoho.com/portal/en/kb/salesiq-2-0/installation-guides/articles/zoho-sites-installation
- Add operators and assign roles in SalesIQ — help.zoho.com/portal/en/kb/salesiq-2-0/admin-guide/operators/articles/operators

Chapter 2: Visitor Tracking & Website Analytics

Once the widget is live, SalesIQ starts building a real-time picture of who is on the client's site, what they're doing, and how engaged they are. This chapter covers the visitor list itself, the privacy controls that govern what SalesIQ is allowed to capture, the Lead Scoring engine that turns raw visitor behavior into a prioritized worklist, and the operational checklist ClearPath uses to hand a tracking configuration off to a client's sales or support team.

2.1 The Real-Time Visitor List

The operator console's visitor list shows everyone currently browsing a tracked site, updated live as visitors move between pages. For each visitor, SalesIQ surfaces the identifying and behavioral data it has captured — location, source/referrer, current and prior pages viewed, time on site, device and browser, and, once a visitor has identified themselves through a form or a chat, name and email. Returning visitors are flagged as such based on browser/device recognition, which lets operators immediately distinguish a first-time browser from someone who has been back to the site multiple times.

Operators can proactively start a chat with any visitor directly from this list, independent of whether a trigger has fired or the visitor has clicked the widget. This is the manual counterpart to the automated proactive engagement covered in Chapter 4 — useful when an operator notices, for example, a known account revisiting a pricing page and wants to reach out immediately rather than waiting on a rule.

For clients with a sales team actively working the visitor list rather than only reacting to inbound chats, ClearPath recommends filtering the list by page, source, or visitor score (section 2.3) rather than scanning the unfiltered feed, particularly once daily traffic climbs into the hundreds of visitors. An unfiltered, high-traffic visitor list quickly becomes noise that trains operators to stop watching it altogether.

2.2 Visitor Consent, IP Masking, and Data Handling

SalesIQ's tracking is built around an explicit consent model rather than silent collection. Visitors on a tracked site are notified that they are being tracked and can choose to allow or block that tracking while still browsing the site; operators can customize the wording and behavior of this consent prompt per Brand. Separately, before any information a visitor provides during a live chat is stored and processed, SalesIQ requires that the visitor's consent be received for that specific

chat data — meaning tracking consent and chat-data consent are handled as two distinct moments in the visitor's interaction with the widget.

Two admin-configurable privacy controls are worth calling out specifically because they are easy to miss during setup. IP address masking can be enabled to avoid unnecessarily storing personally identifiable IP data. Credit card masking, configurable per Brand, prevents card numbers typed into a live chat from ever being displayed on an operator's screen in plain text, with unmasking access controllable by role. ClearPath enables both of these by default on any engagement where the client handles EU visitors or accepts payment-related conversations over chat.

These controls are also a standing agenda item on ClearPath's periodic managed-services check-ins, not just a one-time setup task. A client's regulatory obligations can change — a new customer segment in the EU, a new payment flow introduced through chat — and the corresponding SalesIQ privacy controls should be revisited whenever the client's business changes in a way that touches how visitor or payment data moves through chat.

Verification Note: Zoho's published GDPR material describes SalesIQ as supporting visitor rights to access, modify, and delete their own data, and frames privacy controls as "on by default." The specific self-service workflow an end visitor or a client admin would use to submit and fulfill a formal data-deletion request was not documented in a stable, dedicated help.zoho.com article at the time of writing. Confirm the exact request path in the client's live portal (or via Zoho support) before representing a specific deletion procedure to a client's compliance team.

2.3 Lead Scoring Rules

Lead Scoring assigns a numeric score to each visitor based on activity during their visits — time on site, pages viewed, technology and company data, UTM/campaign parameters, demographic data, prior chat history, and (where SalesIQ is connected to Zoho CRM) existing CRM field values. When SalesIQ is integrated with CRM, this score syncs automatically to the Visitor Score field on the corresponding lead or contact record, and CRM's Visit Summary section displays it directly on the record — provided the visitor has been identified by name and email.

Rules live at Settings > Automate > Lead Scoring. Each rule defines an audience using the same kind of condition logic used elsewhere in SalesIQ (page, geography, behavior, CRM value, etc.) and then a point adjustment — swiping right adds points, swiping left subtracts them. A simple example: a rule targeting visitors whose time on site exceeds fifteen minutes might add 25 points, signaling meaningfully higher engagement than a visitor who bounced after ten seconds.

Scores are not static. By default they recalculate weekly, and a score decays by 25% during a period of visitor inactivity; alternative recalculation intervals — daily, 14-day, 30-day, quarterly, semi-annual, or annual — are available and should be chosen to match the client's typical sales cycle length. Beyond raw scoring, SalesIQ also estimates a deal-closing probability (expressed as a percentage between roughly 0.01% and 99.9%) derived from a visitor's relative lead score, which is useful context for a sales team triaging inbound chats.

Rule management itself is straightforward day to day: an existing rule is edited by clicking it and adjusting its audience or point values, disabled without deletion via its Enable/Disable toggle, and permanently removed via the trash icon at the far right of the rule row. ClearPath reviews a client's scoring rules at each quarterly business review, since a rule built around a page or campaign that no longer exists on the client's site quietly stops contributing anything useful to the score.

Procedure: Create a Lead Scoring Rule

1. Go to Settings > Automate > Lead Scoring.
2. Click Add to start a new rule.
3. Define the target audience using the available conditions (behavior, page, geography, CRM data, UTM parameters, etc.).
4. Move to the scoring section and swipe right to add points, or left to subtract points, for the defined audience.
5. Click Done to save the rule.
6. Repeat for each behavior or attribute the client wants to weight, then review the recalculation interval under the Lead Scoring settings to confirm it matches the client's sales cycle.

Best Practice: Keep the first version of a client's scoring model to four or five rules built around the two or three behaviors that most reliably predict a real sales conversation (e.g., pricing-page time, repeat visits, a specific product page). A sprawling twenty-rule model is harder to explain to the client and harder for ClearPath to tune later.

2.4 Handoff Checklist for Visitor Tracking

Visitor tracking configuration is handed off to the client with a short walkthrough rather than a written document alone, since the real-time visitor list and the scoring model are easiest to understand by watching them work against live traffic. The checklist below is what ClearPath confirms is understood and working before considering this chapter's configuration complete.

Procedure: Visitor Tracking Handoff Checklist

1. Confirm the client's designated sales or support lead can locate and filter the real-time visitor list.
2. Confirm at least one identified visitor (via a completed chat or form) shows correctly in both SalesIQ and, if connected, Zoho CRM.
3. Walk the client through reading a visitor's score and explain the point sources behind it.
4. Confirm IP masking and credit card masking settings match the decisions made in section 2.2.
5. Confirm the visitor consent prompt displays correctly and its wording has been reviewed by the client.
6. Document the scoring model's rule list and recalculation interval in the client's project file.

Sources

- Lead Scoring — help.zoho.com/portal/en/kb/salesiq-2-0/admin-guide/people/articles/leadscoring
- Zoho SalesIQ live chat is GDPR compliant — zoho.com/salesiq/gdpr.html

Chapter 3: Live Chat Operations

This chapter covers the day-to-day mechanics of running live chat: how conversations are routed to the right team, how the widget and chat window are branded to match the client, how operators answer faster with canned replies, the collaboration tools available inside an active chat, and the operating cadence ClearPath recommends once chat is live.

3.1 Departments and Chat Routing

A Department in SalesIQ is both an organizational grouping of operators and, functionally, a routing target. Departments are created at Settings > Company Settings > Departments > Add, where the admin names the department, adds a description, chooses whether it is Public (visible to visitors, with its own embeddable chat widget) or Private (internal-only, for back-office teams that never chat directly with a visitor), and associates operators to it.

Every portal starts with one auto-generated default department, named after the portal itself. ClearPath renames or repurposes this on every build rather than leaving a department named after the portal in front of a client's visitors. Beyond the default, each additional department can carry its own dedicated chat widget, which is what makes it possible to route, say, Sales chats and Support chats to two different teams while presenting either a single unified widget or two visibly distinct ones, depending on the client's preference.

Because Public departments can transfer chats into Private departments, a common pattern is a single Public "Front Desk" department staffed by generalists, with specialist Private departments (billing, technical escalations) that Front Desk operators transfer into once a conversation is triaged.

Operators are added to or removed from a department using the (+) icon under "Associate operators to your department" and the corresponding (-) icon for removal; a profile-picture click during the add step lets the admin correct a mis-added operator before saving. ClearPath's standard department model for a small client starts with two departments — a Public front-line department and one Private escalation department — and expands from there only as the client's team or product complexity genuinely requires it, rather than mirroring the client's full internal org chart in SalesIQ from day one.

3.2 Chat Widget and Chat Window Customization

Widget and window branding live at Settings > Brands > [Brand] > Personalization > Chat & Call. The widget coin itself — the floating chat icon visitors see — can be recolored, repositioned to either bottom corner, swapped for a custom sticker image in place of the default icon, and set to display the assigned operator's photo instead of a generic icon. Online and offline greeting messages are configured separately, and the message text can be hidden entirely so that only the coin displays.

The chat window that opens once a visitor engages has its own, separate set of controls: a choice of visual themes (including support for time-boxed seasonal themes with start and end dates), a Medium or Large window size (mobile sizing adjusts automatically regardless of this setting), window coloring, and an option to show the company logo in the header. For clients who need pixel-level control beyond the built-in theme options, SalesIQ accepts an uploaded custom CSS file, with a live preview while editing, and the platform supports 32 languages including right-to-left layouts for Arabic and Hebrew.

ClearPath treats widget and window branding as a client-facing deliverable in its own right, not an afterthought bolted on after functional configuration. On most engagements, the client's brand colors, logo, and preferred widget position are captured during discovery alongside the technical requirements, and a rough mockup — even just the built-in theme preview — is reviewed with the client before the widget goes live on production, so brand approval doesn't become a rushed conversation at launch.

Common Pitfall: Custom CSS uploads are tied to a specific chat window version (old vs. new chat window). A CSS file built and tested against one version can render incorrectly — or not apply at all — if the client's Brand is later switched to the other window version. Confirm which chat window version is active before handing off a custom CSS file, and re-test after any window-version change.

3.3 Canned Replies

Canned Replies are pre-written responses operators can drop into a chat instead of retyping the same answer to a common question. They are managed at Resources > Canned Replies > Add, where each reply is composed (with support for dynamic text merge fields, triggered by typing "%" while composing), marked Public (available to every operator in the associated department) or Private (visible only to the operator who created it), assigned to a department, and tagged with up to three tags for searchability — "General" is the default tag if none is chosen.

In an active chat, an operator retrieves a canned reply either by clicking the dedicated Canned Replies button and searching by subject, or with the faster keyboard-driven shortcut: typing "/" followed by a few characters of the reply's text or its tag/category name to trigger auto-complete. Role matters here too — Administrators can assign a canned reply to every department, while Supervisors and Associates are limited to assigning a given reply to a single department.

Editing an existing canned reply is a hover-and-click action from the Canned Replies dashboard, and replies can be deleted individually via the trash icon, in bulk via multi-select, or simply disabled (rather than deleted) when a reply is only temporarily out of date — useful, for example, during a pricing change where the reply's wording will be correct again once new pricing is finalized.

Best Practice: Any support team fielding 50+ chats a day should have at least a starter library of canned replies before go-live — greetings, hours/availability, the three or four most common product questions, and a standard chat-closing message. Building this list during onboarding rather than after go-live measurably shortens average response time from week one.

3.4 In-Chat Collaboration Tools

Beyond text messaging, the operator chat window includes a set of tools aimed at resolving a conversation without forcing it off-channel: screen sharing and remote assistance, file and document attachments with whiteboard collaboration, voice message recording (useful when typing a full explanation would be slower than saying it), in-chat payment collection via Zoho Checkouts, and appointment scheduling through Zoho Bookings or a connected CRM calendar.

For collaboration between operators, a chat can be transferred outright to another operator or department, or another operator can be invited into the existing conversation for a second opinion without handing it off. SalesIQ also exposes an internal Cliq-powered group chat tied to a conversation for team discussion that never reaches the visitor — capped at 25 participants and five such groups per chat, which is a generous ceiling for nearly every real support scenario ClearPath has encountered.

Writing-assistance tools are also built into the operator's compose box, including rephrasing, expansion, and grammar-checking of a drafted reply before it is sent, and the console can surface smart, knowledge-base-driven reply suggestions as an operator types — effectively a lighter-weight complement to the Canned Replies library described in section 3.3.

3.5 ClearPath Operating Cadence for Live Chat

Once departments, branding, canned replies, and collaboration tools are configured, ClearPath sets a short recurring cadence with the client's team lead for the first several weeks of live operation, since real visitor traffic reliably surfaces routing and wording issues that no amount of pre-launch testing catches. This is methodology, not a Zoho-documented feature, and is included here because it is the standard ClearPath runs on every Live Chat Operations engagement.

Procedure: First 30 Days of Live Chat — ClearPath Cadence

1. Week 1: daily check-in with the client's team lead reviewing missed-chat volume and any routing complaints.
2. Week 1: audit the first 20–30 real transcripts for canned-reply gaps and add missing replies immediately.
3. Week 2: review department load distribution and rebalance operator assignments if one department is consistently overloaded.
4. Week 2–3: confirm chat widget branding renders correctly across the browsers and devices the client's actual traffic uses (not just the browsers used during testing).
5. Week 4: present a short operating summary to the client covering chat volume, response time, and any configuration changes made during the first month.

Sources

- Defining Departments inside Zoho SalesIQ — help.zoho.com/portal/en/kb/salesiq-2-0/admin-guide/manage-departments/articles/manage-departments
- Customize live chat widget and window — help.zoho.com/portal/en/kb/salesiq-2-0/admin-guide/setup-brand/articles/personalize
- Canned Replies — help.zoho.com/portal/en/kb/salesiq-2-0/admin-guide/resources/articles/cannedreplies
- Operator Chat Window — help.zoho.com/portal/en/kb/salesiq-2-0/for-administrators/conversations/articles/chats

Chapter 4: Triggers & Proactive Engagement

Reactive chat — waiting for a visitor to click the widget — leaves engagement on the table. This chapter covers business hours (which govern when the widget and its automations are even active), Intelligent Triggers, SalesIQ's rules engine for proactively engaging or acting on visitors who meet specific criteria, and the review discipline ClearPath applies to keep a growing trigger library manageable.

4.1 Business Hours Configuration

Business hours are configured per Brand at Settings > Brands > [Brand], using the Business Hours option in the top right of the Brand screen. After enabling the business-hours toggle, the admin selects a time zone, then sets working periods for each day of the week using an interactive slider: clicking and dragging the center of a slider shifts its time window, and dragging from either edge expands or shrinks it. Dragging across an empty part of the day's timeline creates a second slider, which is how a client with a lunch break or a split shift schedule represents that gap. Hovering a day's slider and clicking the trash icon removes availability for that day entirely, marking it fully offline.

A single checkbox — "Hide Chat widget outside business hours" — determines what visitors see once the office closes. Leaving it unchecked keeps the widget visible with an offline message and, depending on configuration, self-service resources or a bot still available; checking it removes the widget from the page entirely outside configured hours, cutting visitors off from even the self-service Answer Hub. ClearPath's default recommendation is to leave the widget visible with an offline message and self-service resources active, and reserve full hiding for clients who specifically do not want any after-hours engagement, automated or otherwise.

Business hours also interact directly with everything else in this chapter: a trigger or a Zobot configured to respect business hours will not fire outside them, so business hours should be finalized before trigger and bot testing begins, not configured as an afterthought once automations are already built.

4.2 Intelligent Triggers: Types and Actions

Triggers are created at Settings > Automate > Triggers > Add and come in two functional types. A Send Chat Invite trigger dispatches an automated proactive chat invitation to visitors matching the trigger's conditions, with configurable operator assignment, custom invitation copy, and a

preview of the invitation before it goes live. An Invoke JS API trigger instead fires custom JavaScript when a visitor meets the trigger's conditions — for example, displaying an on-page banner — and SalesIQ provides a skeleton script as a starting template for that custom logic.

Triggers activate against one of several event types: a visitor landing on a specific page for the first time, a visitor visiting any designated page (not limited to first visit), a custom action defined through additional code, or a visitor showing exit intent. On the action side, in addition to the invite/JS actions above, a trigger firing on exit can push the visitor's captured data into Zoho CRM as a Lead, a Contact, or both, and/or add the visitor to a Zoho Campaigns mailing list — turning an anonymous exit into a workable marketing or sales record.

Invitation copy deserves the same scrutiny ClearPath applies to canned replies: a generic "Can I help you?" invitation converts meaningfully worse than one referencing the specific page or context that triggered it ("Questions about pricing for teams of 10+?" on a pricing page, for instance). ClearPath drafts trigger invitation copy per page or per audience rather than reusing one generic message across every trigger on a Brand.

Procedure: Create a Send Chat Invite Trigger

1. Go to Settings > Automate > Triggers and click Add.
2. Choose Send Chat Invite as the trigger type.
3. Set the activation condition (e.g., visitor lands on a specific page for the first time).
4. Add any additional targeting conditions needed (geography, visitor type, UTM parameters, CRM data, etc.), combined with AND/OR logic as required.
5. Write the invitation message and assign the operator or department it should appear to come from.
6. Use the preview function to confirm the invitation renders as expected.
7. Save and activate the trigger, then monitor the first several fires in the operator console to confirm correct targeting.

4.3 Targeting Conditions and Bot Interactions

SalesIQ ships more than thirty predefined conditions for building trigger audiences, spanning visitor attributes (new vs. returning, past chat count, visit frequency), geography (country, region, state, city), technical signals (browser, operating system, IP address), page context (current or landing page URL and title), campaign data (UTM source, medium, term, content, and name), and — where CRM is connected — contact, lead, account, and deal (potential) data. Conditions can be combined with AND/OR logic to build precise audiences, such as "returning visitor AND on the Pricing page AND UTM source equals a specific campaign."

One interaction matters enough to flag on every engagement: triggers do not fire on a Brand where a Zobot or Answer Bot is currently enabled. A client who wants both proactive trigger invitations and an active chatbot needs a deliberate decision about which mechanism owns first contact with a visitor, because the two do not run side by side on the same Brand. Additionally, using multiple triggers within a single visitor conversation requires the brand's View Old Conversations and Parallel Conversations settings to be enabled — without them, a second trigger targeting a visitor already mid-conversation will not fire as expected.

Because of this bot/trigger exclusivity, ClearPath's build order for a new Brand always resolves the trigger-vs-bot question during the automation planning conversation with the client, before either is built, rather than building both in parallel and discovering the conflict during testing.

Common Pitfall: The single most common SalesIQ misconfiguration ClearPath sees in the wild is a client who builds an elaborate trigger campaign and then separately turns on a Zobot for the same Brand — silently disabling every trigger they just built. Always check for an active Zobot or Answer Bot on the Brand before troubleshooting a trigger that "isn't firing."

4.4 Trigger Library Review Discipline

Trigger libraries tend to grow steadily and rarely get pruned, since disabling a trigger feels riskier than adding a new one. ClearPath schedules a standing quarterly review of every active trigger on a client's Brand as part of managed services, checking each one against current traffic and current page structure.

Procedure: Quarterly Trigger Review

1. Pull the list of all active triggers on the Brand from Settings > Automate > Triggers.
2. For each trigger, confirm the target page(s) still exist and still match the client's current site structure.
3. Cross-check trigger fire volume and resulting chat-invite acceptance rate against the Outbound Reports described in Chapter 8.
4. Disable (not delete) any trigger with negligible fires or a very low acceptance rate, and note the reason in the client's project file.
5. Confirm business-hours alignment is still correct for every active trigger.
6. Report findings and any changes made to the client as part of the standard managed-services summary.

Sources

- Triggers — help.zoho.com/portal/en/kb/salesiq-2-0/admin-guide/automation/articles/triggers

- Setting up business hours — help.zoho.com/portal/en/kb/salesiq-2-0/for-administrators/controls/articles/setup-business-hours

Chapter 5: Answer Bot & Zia AI

This chapter covers SalesIQ's self-service and automated-response layer: the Answer Hub knowledge base, the no-code Zobot bot builder, and the Zia-powered Answer Bot that can answer visitor questions directly from a client's published knowledge base — whether that knowledge base lives in SalesIQ itself or in a connected Zoho Desk account — plus the content-maintenance discipline that keeps a bot's answers accurate over time.

5.1 The Answer Hub: Articles and FAQs

The Answer Hub is SalesIQ's built-in knowledge base. Articles are created at Answer Hub > Articles > Compose: the author titles and saves the article, which opens a Zoho Writer–powered rich-text editor for the body content. The editor includes three AI-assisted writing tools worth knowing about — Generate, which drafts a new article from inputs like a URL, a title, or a set of keywords; Refine, which expands or adjusts the tone of existing content; and Correct, which fixes grammar, spelling, and formatting automatically.

Once drafted, an article is configured with a language (multiple language variants are supported per article), one or more associated departments, a category for hierarchical organization, the channels it should appear on, up to three attachments (5 MB each), and links to related follow-up articles or FAQs. An article can be saved as a draft for internal review or published immediately. Published articles surface to visitors in two places: inside the live chat window's self-service "Help" tab, and as training material that improves Answer Bot's automated responses. Operators can also manually share an article as a link inside any connected messaging channel.

ClearPath's standard practice is to seed the Answer Hub with the client's ten to fifteen most frequently asked questions — sourced from existing support ticket history where available — before either Zobot or Answer Bot is configured, since both features improve in direct proportion to the quality and completeness of the underlying article library. A bot layered on top of an empty or thin knowledge base has nothing useful to draw from.

Procedure: Publish a Self-Service Article

1. Go to Answer Hub > Articles > Compose.
2. Enter a title and save to open the article editor.
3. Draft the content, optionally using Generate, Refine, or Correct to speed up authoring.
4. Set the language, department(s), category, and channel(s) the article should appear on.

5. Add attachments or related-article links if applicable.
6. Publish the article, or save it as a draft for internal review first.
7. Confirm it appears correctly in the chat window's Help tab on the relevant Brand.

5.2 Zobot: The Codeless Bot Builder

Zobot is SalesIQ's no-code chatbot platform, configured at Settings > Bots > Zobot > Add. The setup flow starts with a platform choice — the built-in Codeless Bot Builder, SalesIQ Scripts (for developers who want to write bot logic directly), Zia Skills, or a connection to a third-party engine such as Dialogflow, Watson Assistant, Azure Bot Service, or a generic webhook. Most ClearPath engagements use the Codeless Bot Builder, which requires no development resources to stand up and maintain.

After the platform choice, the bot is given a name and description, assigned to a Brand, associated with specific departments (or set to serve all departments), and enabled on whichever channels it should run — website, mobile SDK, Facebook Messenger, Instagram, WhatsApp, Telegram, or LINE. Zobot supports 30 languages, with automatic detection of the visitor's language from their first message, a fallback to a default language when the detected language isn't supported, per-language content authored individually (there is no automatic translation), and language locking once a conversation begins so the bot doesn't flip languages mid-conversation.

The bot builder itself is visual: pre-built multilingual templates are available with a preview via "Show Details," or a bot can be built from scratch using a drag-and-drop card gallery. A "Test your bot" mode lets the builder step through the conversation before publishing, warning icons flag configuration errors, and publishing is a single click that requires no changes to the site's embed code. Beyond the conversation flow itself, Zobot supports configurable idle-visitor alerts, chat-timeout behavior (end the conversation, forward to a human operator, or mark it missed), rollback to a previous step, and a full restart of the flow.

Every Zobot flow ClearPath builds includes an explicit, easy-to-find "talk to a human" path — a card the visitor can reach within one or two steps from anywhere in the flow, forwarding to the appropriate department. A bot that traps a frustrated visitor in automated dead ends does more brand damage than having no bot at all.

Best Practice: Build the first version of any client's Zobot around the three to five questions its human operators answer most often, verified against real chat transcripts rather than guessed at — then expand the flow only after watching how real visitors actually respond to it. A bot with twenty branches nobody tests against real traffic tends to trap visitors more than it helps them.

5.3 Publishing the Zoho Desk Answer Bot Inside SalesIQ

Clients running Zoho Desk alongside SalesIQ can surface Desk's Zia-powered Answer Bot directly inside SalesIQ chat and inside a Zobot flow, rather than maintaining a second, separate knowledge base just for chat. Setup starts inside Zoho Desk: an Answer Bot is created at Setup > Zia > Answer Bot > Add Answer Bot, with the "Customers" audience enabled and "Web" selected as a channel, and the Desk chat channel itself is enabled at Setup > Channels > Chat with the relevant departments and agents associated. Critically, the Desk knowledge base articles the bot is meant to draw from must be published for All users — an article restricted to internal or agent-only visibility will not be surfaced by the bot to a visitor.

On the SalesIQ side, the connection is made at Setup > Channels > Chat > Advanced Settings, where an Answer Bot is selected under Settings, and — separately — at Resources > (select) Zoho Desk Resources, followed by Save. Department alignment matters here too: SalesIQ departments are mapped to their corresponding Zoho Desk departments at Settings > Integrations > Zoho Desk > Department mapping, which is also where the specific Answer Bot to use per department is selected. Once connected, the bot analyzes an incoming visitor question, matches it against published Desk knowledge base content, and returns an answer without a human operator needing to intervene first — the same Answer Bot can also be dropped into a Zobot flow as a card by selecting Zoho Desk Resources from the Zobot builder's Resources tab.

Verification Note: Zoho's own naming is inconsistent across surfaces between "Answer Bot" as a Zia/Desk-powered feature and "Answer Bot" as a generic term for any SalesIQ self-service bot; a dedicated, stable help.zoho.com article walking through Answer Bot configuration purely from the SalesIQ side (as opposed to the Desk-originated setup documented above) was not located at the time of writing. Before representing an "Answer Bot" workflow to a client that does not also run Zoho Desk, confirm current SalesIQ-native Answer Bot availability and setup steps directly in the client's portal.

5.4 Bot and Article Maintenance Cadence

A bot or knowledge base configured once at launch and never revisited degrades quietly: product changes, pricing changes, and seasonal offers all make previously accurate answers wrong without any error message alerting anyone. ClearPath treats bot and article content as living material requiring a defined review cadence, not a one-time build deliverable.

Procedure: Monthly Answer Hub / Bot Content Review

1. Pull the Bot Reports for the prior month (Chapter 8) and identify the highest-volume questions the bot could not answer or handed off to a human.

2. Draft or update Answer Hub articles to cover the top three to five recurring gaps.
3. Spot-check five to ten published articles against current product/pricing reality and correct any that have drifted out of date.
4. Re-test the Zobot flow end to end after any article or flow change.
5. Log all changes made in the client's project file for audit purposes.

Sources

- How to create a chatbot for your website? (Zobot) — help.zoho.com/portal/en/kb/salesiq-2-0/build-chatbots/codeless-bot-implementation-guide/articles/zobots-chatbot-building-platform
- Articles — help.zoho.com/portal/en/kb/salesiq-2-0/for-administrators/resources/articles/articles
- Using Zoho Desk Answer Bot in SalesIQ chat and Zobot — help.zoho.com/portal/en/kb/desk/zia/articles/publishing-zoho-desk-answer-bot-using-salesiq-chat-and-zobot

Chapter 6: Mobile SDK & Omnichannel

Website chat is only one surface. This chapter covers Mobilisten, SalesIQ's mobile chat SDK for native and cross-platform apps, the messaging-channel integrations — WhatsApp foremost among them — that let a single SalesIQ operator team handle conversations arriving from outside the website entirely, and the cross-channel operational considerations ClearPath builds into every omnichannel engagement.

6.1 Mobilisten SDK for Android

SalesIQ's mobile chat SDK is called Mobilisten. On Android, the minimum supported OS is Android 5.0 (Lollipop, API level 21), with a compile SDK target of 34 (Android 14); if the client's app needs in-app call support specifically, the project additionally needs Gradle wrapper 8+, Android Gradle Plugin 8.0.2, and Kotlin 1.9.10 or later.

Keys are generated from the same Installation screen used for the website script: Settings > Brands > [Brand] > Installation, selecting Android, entering the app's application ID, and clicking Generate. This produces one app key (which cannot be regenerated once issued) and allows up to three simultaneous active access keys per app — useful for rotating a key without a hard cutover across dev, staging, and production builds.

Installation itself follows a standard native-SDK pattern: add Zoho's Maven repository (<https://maven.zohodl.com>) to the project's Gradle configuration, add the Mobilisten dependency to the app module's build.gradle, and initialize the SDK from an overridden Application class's onCreate() method, registering lifecycle callbacks and referencing that Application subclass by name in AndroidManifest.xml. The INTERNET permission is mandatory, and ProGuard rules need to be added if the app ships with minification enabled.

Because the app key cannot be regenerated once issued, ClearPath generates and records Android (and iOS) SDK keys as a discrete, documented step in the client's project file at the start of any mobile SDK engagement, rather than generating them ad hoc mid-build where they can be lost track of across a development team.

6.2 Mobilisten for iOS, React Native, and Flutter

Mobilisten ships equivalent SDKs for iOS (installed via CocoaPods against the client's Xcode project), React Native (published as an npm package with a native-module link step), and Flutter

(published as a pub.dev package). In each case the underlying pattern mirrors Android: install the platform-appropriate package, initialize the SDK early in the app's lifecycle using the app key and access key generated from the same Brand > Installation screen, and then invoke the SDK's chat-launch method wherever the client wants an in-app chat entry point to appear.

Because ClearPath's Android walkthrough above was verified against a specific, dated SDK release, and mobile SDKs change frequently across major versions, the exact current method names, minimum OS versions, and dependency syntax for iOS, React Native, and Flutter should be pulled fresh from Zoho's developer documentation for each engagement rather than assumed to match this manual verbatim.

Verification Note: Detailed, current step-by-step procedures for the iOS, React Native, and Flutter Mobilisten SDKs were not independently fetched and verified in full for this edition of the manual — only their existence and general installation pattern were confirmed via Zoho's developer documentation index. Pull the live installation guide for the specific platform and SDK version at the time of each mobile implementation rather than relying on this summary for exact code.

6.3 WhatsApp Channel Integration

WhatsApp is configured at Settings > Messaging Channels > WhatsApp > Add. Before starting, the client needs a Facebook Business Manager account and a valid phone number for the WhatsApp Business API — a number already active on WhatsApp Business elsewhere must be removed from that prior integration first, since a phone number can only be connected to one WhatsApp Business API integration at a time. Each SalesIQ Brand can, in turn, be connected to only one WhatsApp number at a time; a client that needs multiple WhatsApp numbers needs multiple Brands.

Setup proceeds in phases: connecting and authorizing a Facebook Business account, configuring the WhatsApp Business Account (WABA) profile (name, email, category, time zone, and a mandatory business website URL — this step cannot be skipped), choosing between a free Zoho-provided WhatsApp number or verifying the client's own number by SMS or voice call, waiting on Meta's review and approval of the business and display name, and finally, back in SalesIQ, selecting the approved WhatsApp profile and number, purchasing message credits, and assigning the channel to a department.

Meta's review timeline is outside Zoho's or ClearPath's control and can add several business days to a WhatsApp rollout, so ClearPath schedules WhatsApp setup as an early, parallel workstream on any engagement that includes it — kicking off the Facebook Business verification step as soon

as the client's credentials are available, rather than waiting until the rest of the SalesIQ build is otherwise complete.

Common Pitfall: WhatsApp credits purchased for SalesIQ are dedicated to SalesIQ messaging and cannot be transferred to or shared with other Zoho products. Budget for them as a distinct, ongoing line item in the client's SalesIQ costs rather than assuming any existing Zoho messaging credit pool covers WhatsApp traffic. Also flag for the client up front: if a WhatsApp number is ever migrated between systems, only the number itself moves — existing chat history, media, and templates do not come with it.

6.4 Other Messaging Channels

Beyond WhatsApp, SalesIQ supports additional messaging channels — including Instagram and Facebook Messenger — that let a visitor start a conversation on that platform and have it land in the same operator console and department structure as website chat, and (per Chapter 5) the same Zobot can be deployed across several of these channels rather than needing a separate bot per platform.

Verification Note: Step-by-step setup for Instagram and Facebook Messenger as SalesIQ channels — analogous to the WhatsApp walkthrough above — was referenced in Zoho's marketing and blog material but a dedicated, stable help.zoho.com configuration article for each channel was not independently fetched for this edition. Treat the WhatsApp procedure above as the reliable, source-grounded reference, and confirm the exact steps for any other channel directly in the client's portal (Settings > Messaging Channels) before committing to a setup timeline.

6.5 Omnichannel Operational Considerations

Adding channels multiplies the surfaces an operator team has to watch, and ClearPath does not recommend enabling every available channel simply because it exists. Each additional channel should be justified by a specific client need — an existing WhatsApp-heavy customer base, an Instagram-driven sales funnel — and staffed accordingly before it goes live, rather than switched on speculatively and left unmonitored.

Procedure: New Channel Rollout Checklist

1. Confirm a business justification and expected volume for the new channel before configuring it.
2. Confirm department and operator assignment for the new channel mirrors (or deliberately differs from) the website chat routing model.

3. If a Zobot serves this channel, re-test the flow specifically on the new channel — card types and formatting can render differently across channels.
4. Set a review point at 30 days to check actual volume against the original justification.
5. Add the channel to the client's Reports filters (Chapter 8) so its performance is visible alongside website chat.

Sources

- Android Mobile SDK Installation - SalesIQ 2.0 — zoho.com/salesiq/help/developer-guides/android-mobile-sdk-installation-2.0.html
- Installing Live Chat on your iOS Mobile Application — zoho.com/salesiq/help/developer-section/ios-mobile-sdk-installation.html
- Installing Live Chat on your React Native Mobile Application — zoho.com/salesiq/help/developer-section/react-native-sdk-installation.html
- Installing Zoho SalesIQ's Mobilisten in Flutter app — zoho.com/salesiq/help/developer-guides/flutter-sdk-installation.html
- Integrating WhatsApp Channel with Zoho SalesIQ — help.zoho.com/portal/en/kb/salesiq-2-0/for-administrators/channels/articles/whatsapp-channel-integration
- Boost your customer engagement with messaging channels in Zoho SalesIQ — zoho.com/blog/salesiq/channels-in-zohosalesiq.html

Chapter 7: CRM/Desk Integration & Lead Handoff

SalesIQ rarely runs in isolation on a ClearPath engagement — it is almost always the front door for leads flowing into Zoho CRM and, for clients running support operations, the intake channel for tickets flowing into Zoho Desk. This chapter covers both handoffs and the reconciliation check ClearPath runs to make sure records are landing correctly on both sides.

7.1 Zoho CRM Integration Setup

For a client who does not yet have SalesIQ connected, the integration is initiated from the CRM side at Setup > Channels > Chat > Get Started, where an account name is entered (the Account URL is generated automatically), the CRM users who should get SalesIQ access are selected, and initial lead-generation preferences are set. A client who already has an existing, separately created SalesIQ portal instead uses the "SalesIQ – Map existing account" option in that same Chat setup screen to associate that portal with the CRM instance rather than provisioning a new one. Ongoing configuration — notification preferences and trigger management specifically — is managed from the SalesIQ side at Settings > Integrations > Zoho CRM > CRM Configuration. Each CRM organization can be associated with up to five SalesIQ portals.

ClearPath confirms, before starting this integration, which CRM users actually need SalesIQ access — over-provisioning SalesIQ seats to every CRM user regardless of whether they handle chat creates both unnecessary licensing cost and a confusing operator roster for the client to maintain going forward.

7.2 Visitor-to-Lead/Contact Data Sync

Once connected, identified website visitors sync into CRM as Leads or Contacts, along with their complete visit history (timestamps, pages viewed), any chat transcripts, and engagement metrics such as time on site, pages visited, and referrer information — all attached to the corresponding CRM record. Whether a new visitor becomes a Lead or a Contact is a configuration choice ("Push your visitors to CRM as..."), as is who owns the resulting record: assignment can go to whichever operator handled the chat, or to specific designated CRM users, and routing rules can further refine that assignment based on visitor criteria.

Deals are not synced automatically from visitor activity — SalesIQ's role in the pipeline is capturing and qualifying the visitor, not creating opportunities on its own. Where a client wants

visitor activity to trigger deal creation or a related task, that logic is built as a standard CRM workflow rule reacting to the newly synced lead/contact data, not as a native SalesIQ feature.

Best Practice: Decide the Lead-vs-Contact push setting deliberately with the client before go-live, based on how their sales team already qualifies inbound records elsewhere (web forms, other channels). A visitor pushed in as a Contact when the sales team's process expects a Lead — or vice versa — creates duplicate-record cleanup work down the line that is entirely avoidable at setup time.

7.3 Zoho Desk Integration and Ticket Creation

The Desk integration is enabled from SalesIQ at Settings > Developers > Integrations > Zoho Desk > Add, and requires the same email address to be registered on both the SalesIQ and Desk accounts. Once connected, the administrator's Desk privileges, access, and permissions are replicated into SalesIQ automatically. The integration stays active until manually disabled from that same settings screen.

With the integration live, admins configure which conversations convert into Desk tickets: every chat from any visitor, only chats an operator actually attended, only missed chats, or none at all (manual conversion only). Conversion timing is configurable too — a ticket can be generated while the operator is still answering the chat, or only once the chat ends — and the resulting ticket's initial status (Open or Closed) is set as part of that same configuration. An operator can also convert any individual chat into a ticket manually from the Desk widget in the chat sidebar, choosing priority, status, classification, and destination department at that moment.

During an active chat, the Desk sidebar surfaces relevant account context automatically — account name, SLA status, contract details, and existing ticket counts for that visitor — and, if a prior request already exists for the same contact, the operator can associate the current chat with that existing request instead of generating a duplicate ticket. Desk's published knowledge base articles also sync into SalesIQ's resource library on a configurable schedule (daily, weekly, or monthly), which is what makes the Chapter 5 Answer Bot handoff possible without maintaining two separate knowledge bases.

Procedure: Enable Chat-to-Ticket Conversion

1. Confirm the Zoho Desk integration is active at Settings > Developers > Integrations > Zoho Desk.
2. Decide which chats should convert to tickets: all chats, attended chats only, missed chats only, or none (manual only).
3. Set the conversion timing: while answering the chat, or once the chat ends.

4. Set the initial ticket status (Open or Closed) for auto-created tickets.
5. Confirm department mapping between SalesIQ and Desk departments is correct, since it also governs Answer Bot routing (see Chapter 5).
6. Test with a sample chat and confirm the resulting Desk ticket carries the correct transcript, contact, and department.

7.4 Handoff Reconciliation Check

Because visitor and chat data now fans out to CRM, Desk, or both, ClearPath runs a short reconciliation pass at the end of every CRM/Desk integration engagement to confirm nothing is silently dropping or duplicating between systems before the client relies on this data for reporting or follow-up.

Procedure: CRM/Desk Reconciliation Check

1. Run three test chats representing distinct scenarios: a new anonymous visitor, a known existing CRM contact, and a chat that should trigger a Desk ticket.
2. Confirm each test chat's transcript appears correctly attached to the corresponding CRM record.
3. Confirm the Desk ticket (where applicable) carries the correct status, department, and transcript.
4. Confirm no duplicate lead/contact or duplicate ticket was created for the known existing contact scenario.
5. Document the final routing, push, and conversion settings in the client's project file for future reference.

Sources

- Set up SalesIQ Integration — help.zoho.com/portal/en/kb/crm/articles/salesiq-setup-crm-integration
- Integrate Zoho Desk with Zoho SalesIQ — help.zoho.com/portal/en/kb/salesiq-2-0/integration-guides/zoho-apps/articles/zohodeskinsalesiq

Chapter 8: Reporting, Security & Administration

The final chapter covers how ClearPath and a client measure whether a SalesIQ deployment is actually working — the Reports module — and the administrative controls that govern who can see what and how visitor data is handled once it's captured, closed out with ClearPath's standard managed-services reporting rhythm.

8.1 The Reports Module

Reports is available on Professional and Enterprise plans and is organized into five categories. Brand Reports cover website-level engagement: total visits, average visit duration, page views, visit trends over time, device and traffic-source breakdowns, geographic distribution, conversation volume, and bounce data (a "visit bounce" or "session bounce" being a single-page visit with minimal interaction). Operator Reports cover team performance: chat acceptance rates, customer feedback ratings, operator availability, chat load distribution across the team, chat actions taken (emails sent, tickets created, records moved to CRM), average response time and chat duration, and abandonment metrics.

Bot Reports cover automated-conversation performance — bot chat volume and closure rates, a bot-versus-human comparison, message effectiveness, how much load the bot is offloading from human operators, and resolution rates. Outbound Reports cover proactive and broadcast communications: broadcast campaign delivery and engagement, proactive message performance, recipient response rates, and operator outreach activity. Live Insights is the real-time layer on top of all of this — a live dashboard of active chats and calls in progress, queue depth, operator status, and alerts for conversations that have been running unusually long.

The Reports toolbar supports date-range filtering, manual refresh, and filtering by operator, Brand, department, or bot name. Reports can be exported to a device or emailed to portal users in .xlsx or .csv format, with the option to select individual report widgets rather than exporting an entire dashboard, and to set a custom filename and time range on each export.

ClearPath uses these five report categories as the backbone of its own recurring client reporting, mapping directly to the chapters in this manual: Brand Reports validate Chapter 2's tracking configuration is capturing real engagement, Operator Reports validate Chapter 3's routing and staffing model, Bot Reports validate Chapter 5's Zobot and Answer Bot investment, Outbound Reports validate Chapter 4's trigger library, and Live Insights supports real-time escalation monitoring during high-traffic periods (a product launch or a marketing campaign, for example).

8.2 Roles, Permissions, and Administration

The three operator roles introduced in Chapter 1 — Administrator, Supervisor, Associate — are the entirety of SalesIQ's role-based access model at the operator level, and they govern reporting access along with everything else: Associates, being limited to their own chats and personal data, cannot see portal-wide performance reports at all, which is a common point of confusion for a client's front-line staff expecting the same visibility a Supervisor or Administrator has.

For administration generally, ClearPath's practice is to hold the Administrator role on the client's portal only for the duration of active implementation work, then hand primary Administrator ownership to a named client stakeholder at go-live, retaining a secondary ClearPath Administrator account for ongoing managed-services support rather than leaving implementation-only credentials active indefinitely.

Role assignment should also be reviewed whenever a client's team changes — a departing employee's operator account removed promptly, and a promoted team lead's role upgraded from Associate to Supervisor as their responsibilities actually change. ClearPath includes an operator-roster review as a standing item in its quarterly managed-services check-in for exactly this reason.

8.3 Data Privacy and GDPR Controls

Chapter 2 covered the visitor-facing side of SalesIQ's privacy model — tracking consent and chat-data consent. From an administrative standpoint, the same portal-level controls (IP masking, credit card masking, password-protected exports of transcripts, leads, and reports) are what ClearPath verifies as part of every go-live checklist for a client operating in a regulated market or handling payment conversations over chat. Zoho positions SalesIQ's privacy posture as "Privacy by Design" — meaning the relevant protections are meant to be on by default rather than requiring the client to discover and enable them — but ClearPath still confirms each control's actual state in the live portal rather than assuming defaults have not been altered by a prior admin.

8.4 ClearPath Managed-Services Reporting Rhythm

Configuration alone does not keep a SalesIQ deployment healthy — the Reports module (section 8.1) only creates value if someone is actually reviewing it on a regular cadence and acting on what it shows. This closing section sets the standard reporting rhythm ClearPath commits to for every client on a managed-services retainer covering SalesIQ.

Procedure: Standard Managed-Services Reporting Cadence

1. Monthly: export Brand, Operator, and Bot Reports for the prior month and compare against the previous period.
2. Monthly: review the operator roster and role assignments for accuracy (section 8.2).
3. Quarterly: run the Trigger Library Review (Chapter 4) and the Answer Hub / Bot Content Review (Chapter 5).
4. Quarterly: revisit privacy and data-handling settings (section 8.3) against any changes in the client's business.
5. Quarterly: deliver a written summary to the client covering chat volume trends, response-time trends, and any configuration changes made, using this manual's chapter structure as the summary's outline.

Sources

- Reports 2.0 — help.zoho.com/portal/en/kb/salesiq-2-0/for-administrators/reports/articles/reports-module-2-0
- Add operators and assign roles in SalesIQ — help.zoho.com/portal/en/kb/salesiq-2-0/admin-guide/operators/articles/operators
- Zoho SalesIQ live chat is GDPR compliant — zoho.com/salesiq/gdpr.html