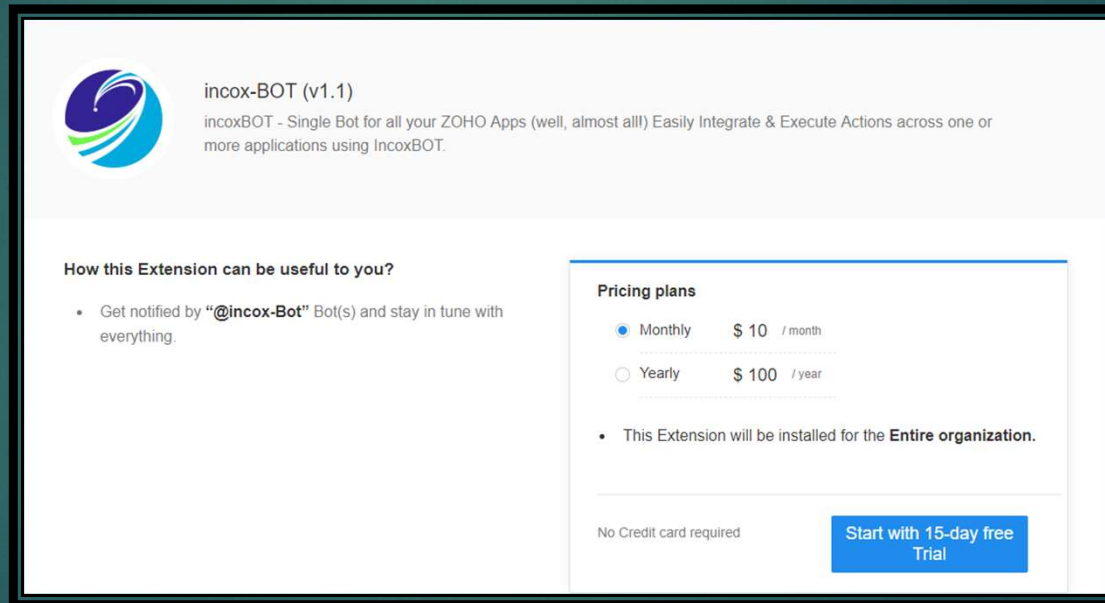




**‘ZOHO CLIQ’
ON-BOARDING PROCESS
FOR
‘DOT2GLOBE’
‘INCOX’ INTEGRATION PLATFORM
USER GUIDE**

- **Login to Cliq using your account**
- **Install the JNCOX BOT extension from Zoho Marketplace & you will notice the below screen**
- **Select the appropriate option. If you are installing for the first time, you can 'Start with the 15-day free Trial' by clicking the button**



incox-BOT (v1.1)
incoxBOT - Single Bot for all your ZOHO Apps (well, almost all!) Easily Integrate & Execute Actions across one or more applications using IncoxBOT.

How this Extension can be useful to you?

- Get notified by "@incox-Bot" Bot(s) and stay in tune with everything.

Pricing plans

- Monthly \$ 10 / month
- Yearly \$ 100 / year

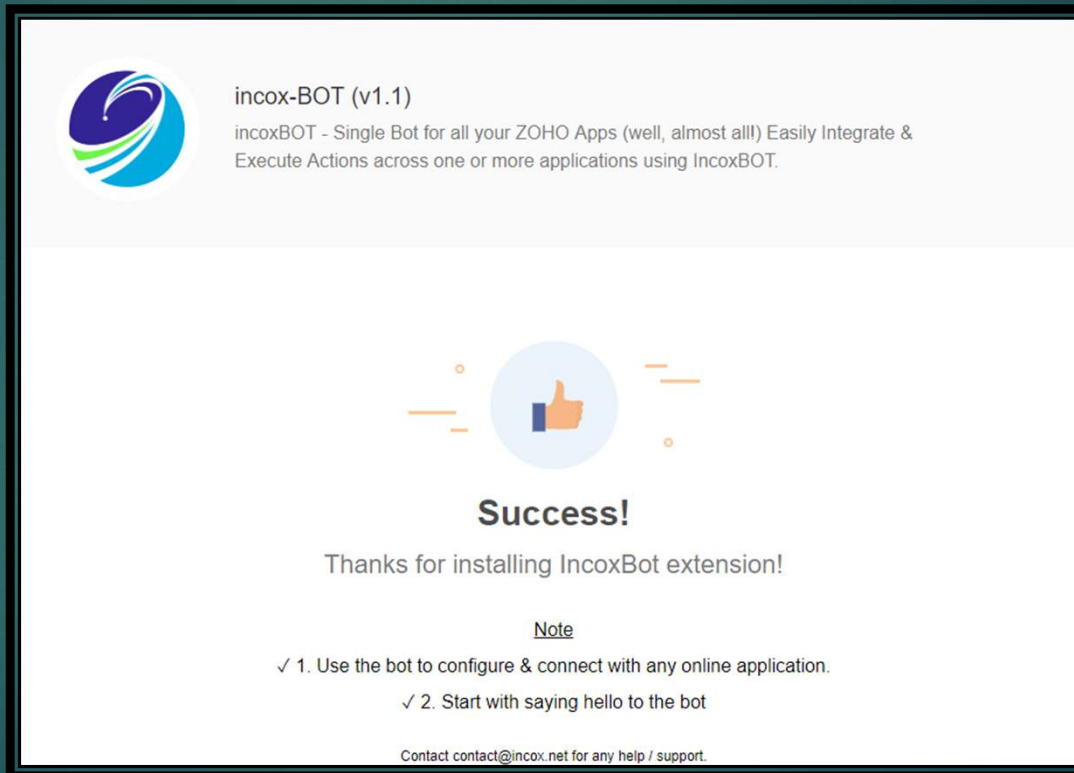
- This Extension will be installed for the **Entire organization**.

No Credit card required [Start with 15-day free Trial](#)


Note: The installation of this extension is a one-time activity for the entire Cliq Organization. Usually, an Org Admin shall perform this installation.


- *Screen you will notice after Installation of Extension from Marketplace*

- *Close the window and proceed to Cliq Window*



The screenshot shows the installation success screen for the IncoxBOT extension. At the top left is the IncoxBOT logo, a stylized blue and green swirl. To its right, the text reads "incox-BOT (v1.1)" followed by a description: "incoxBOT - Single Bot for all your ZOHO Apps (well, almost all!) Easily Integrate & Execute Actions across one or more applications using IncoxBOT." The center of the screen features a large blue thumbs-up icon surrounded by decorative orange and blue lines. Below this, the word "Success!" is written in bold, followed by "Thanks for installing IncoxBot extension!". A "Note" section follows, containing two steps: "✓ 1. Use the bot to configure & connect with any online application." and "✓ 2. Start with saying hello to the bot". At the bottom, contact information is provided: "Contact contact@incox.net for any help / support."

 incox-BOT (v1.1)
incoxBOT - Single Bot for all your ZOHO Apps (well, almost all!) Easily Integrate & Execute Actions across one or more applications using IncoxBOT.



Success!

Thanks for installing IncoxBot extension!

Note

- ✓ 1. Use the bot to configure & connect with any online application.
- ✓ 2. Start with saying hello to the bot

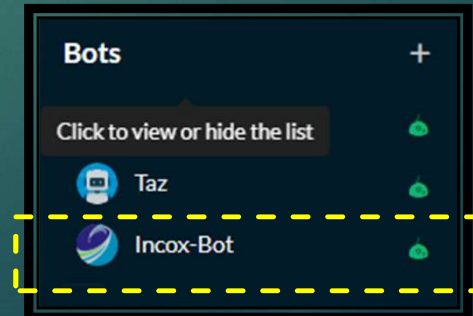
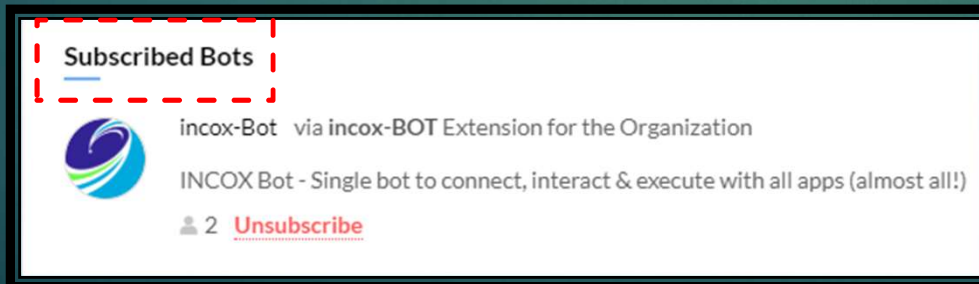
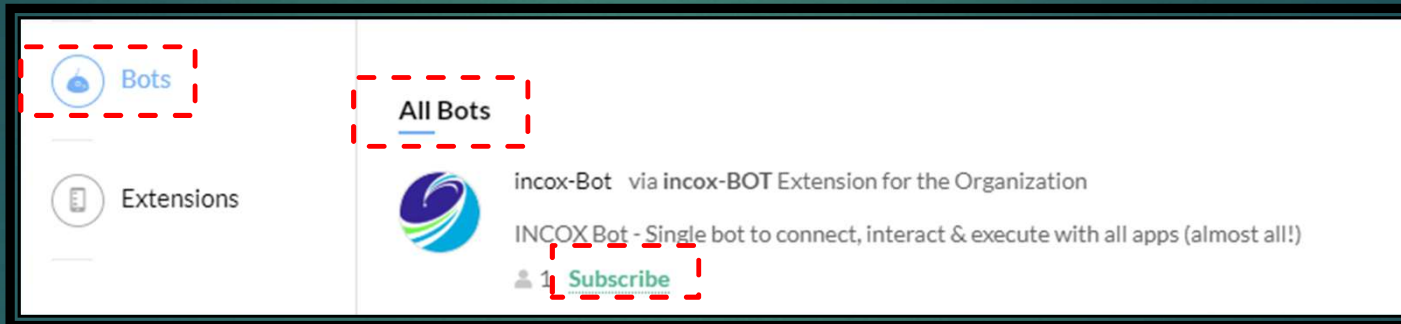
Contact contact@incox.net for any help / support.

- **Once the admin installs the extension, the users of the Organization just need to subscribe to the incoxBot as shown below.**

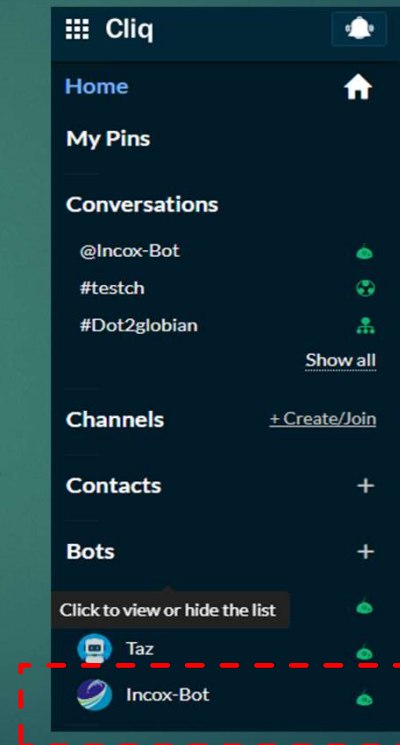
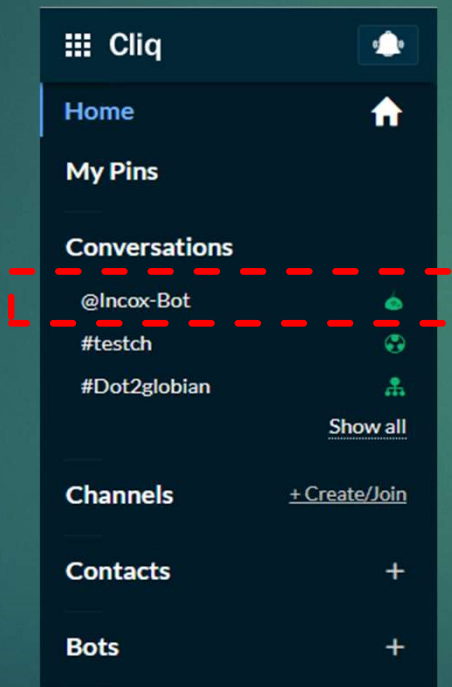
- **To subscribe to 'incoxBot', click the plug icon on top right corner of Clig Window**



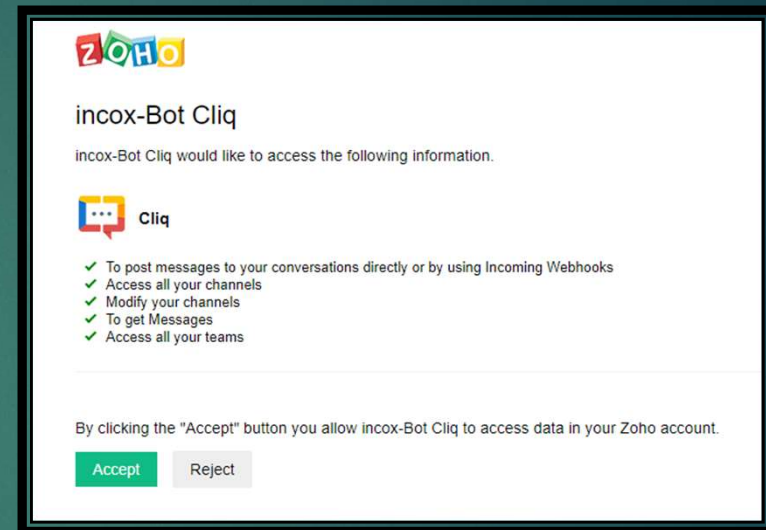
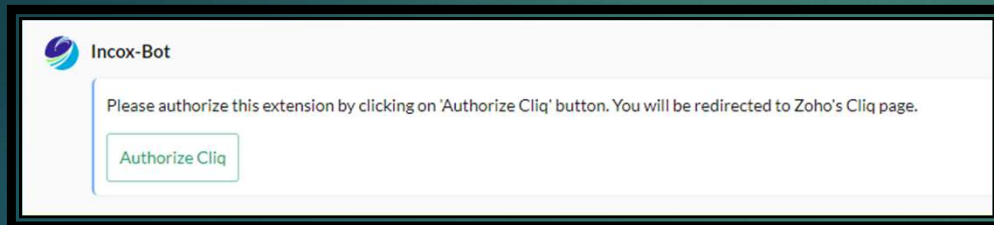
- **Click 'Subscribe' under 'All Bots' section of 'Bots' as per below screen**
- **You will notice 'incox-Bot' under 'Subscribed Bots' and also in Clig Window as per below snapshot**



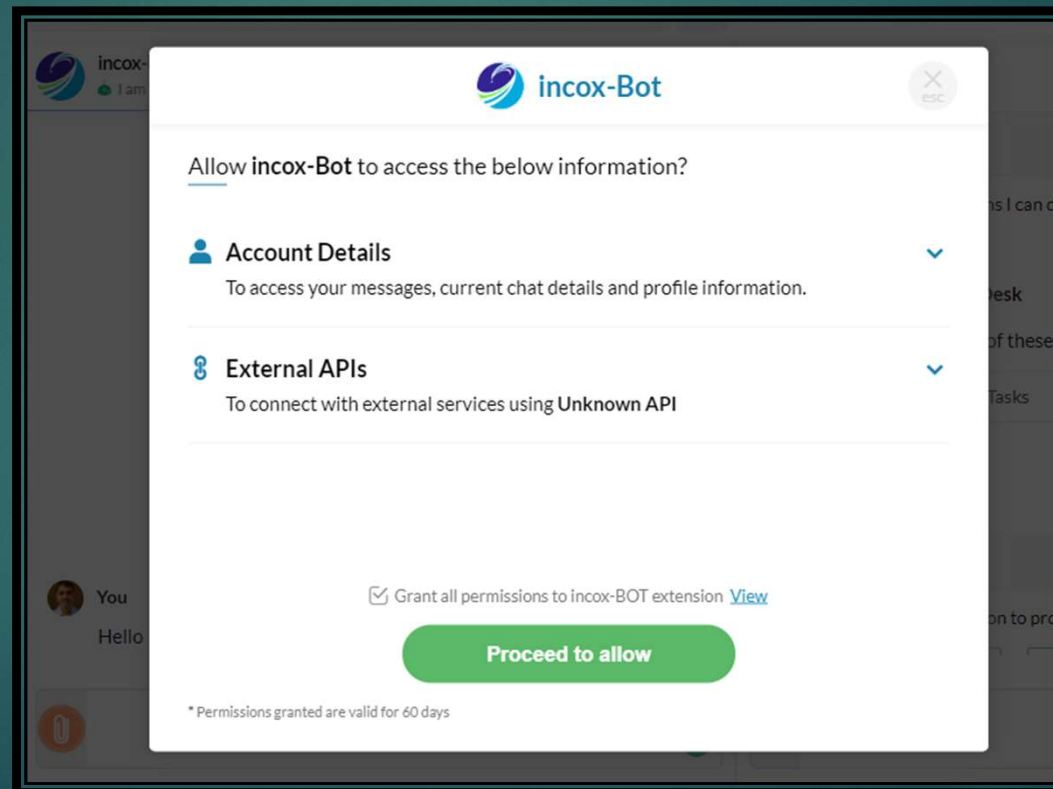
- **Check for incoxBot in your Cliq channel as per below screen-shot. Refresh the screen if you are not noticing the incoxBot**
- **Select incox-Bot under Conversations and 'Authorize' Cliq' as shown in next slide**



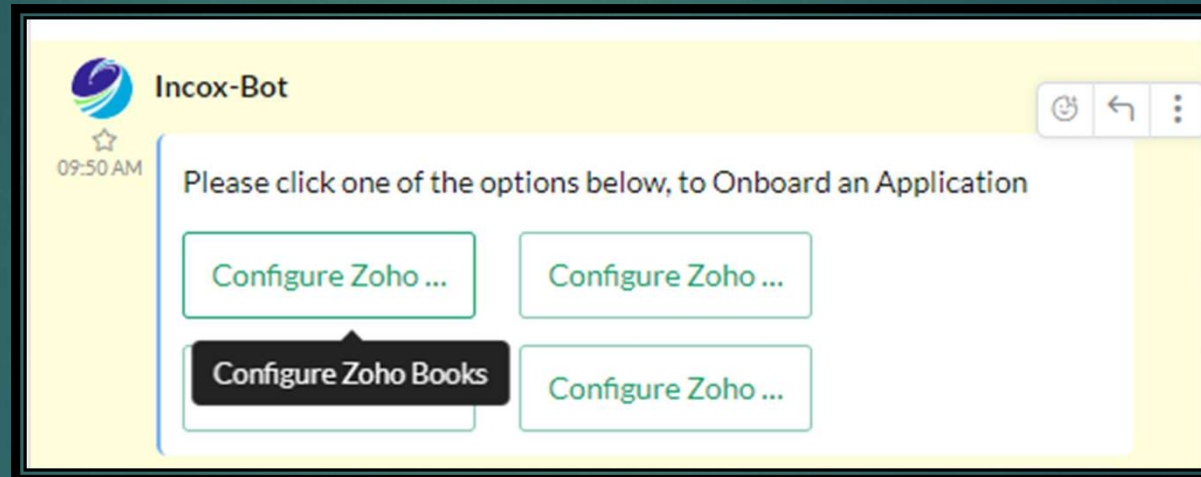
- **Authorize incox-Bot for Cliq**
- **Click "Accept" to complete authorization. You will be re-directed to JNCOX Website. Close the window and go to Cliq**



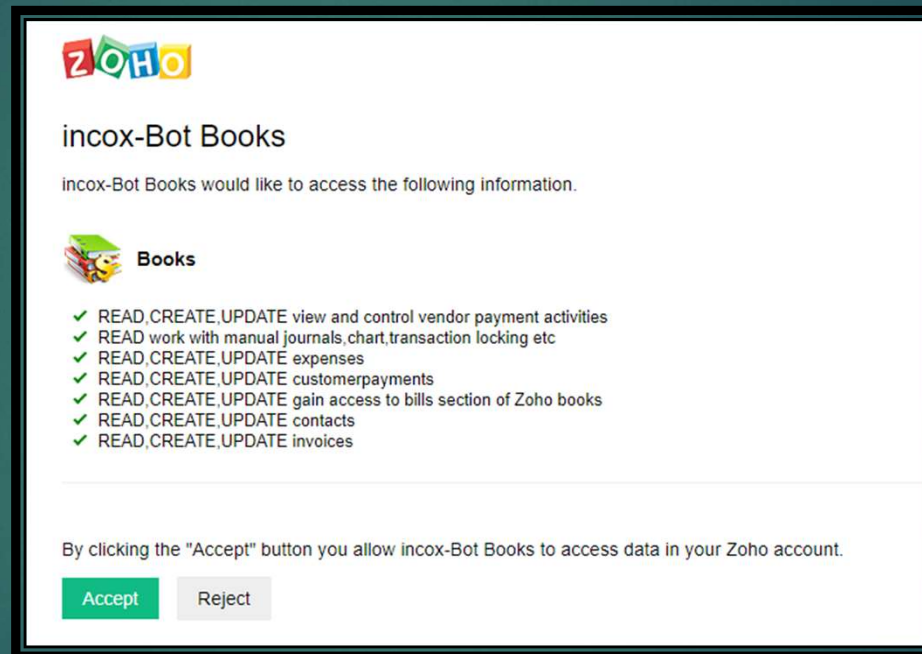
- **Type 'Hello' and a pop-up window opens as below. Check the check-box "Grant all permissions to incox-BOT extension"**
 - **Click "Proceed to allow" button**



- *You will see the list of supported applications to be Configured*
- *Click a particular application button you want to Configure e.g. 'Configure Zoho Books'*

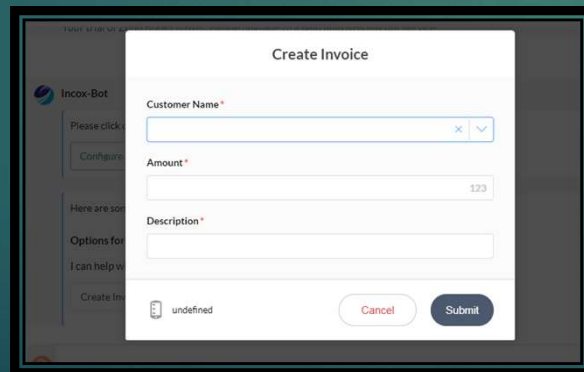
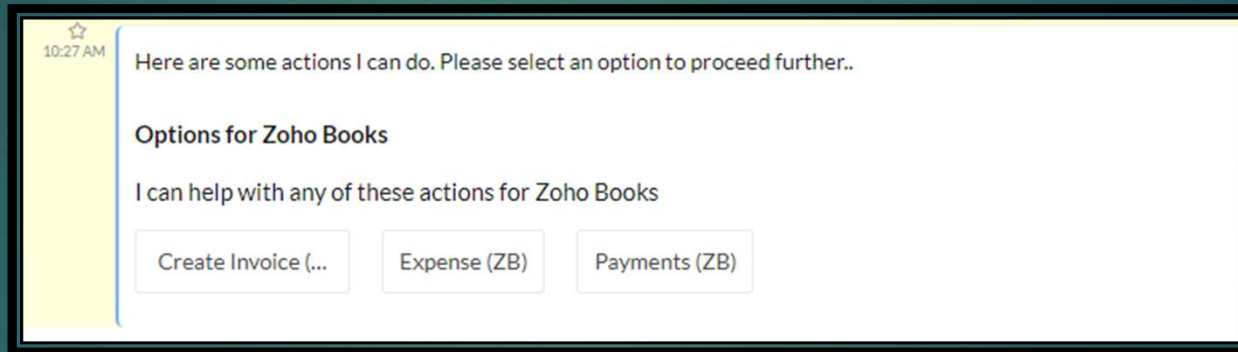


- **Authorize the Application for the incox-Bot.**
- **Click 'Accept' to set the permissions. Once it is successful, you will be re-directed to INCOX FAQ Site. Close the window and go to Cliq**

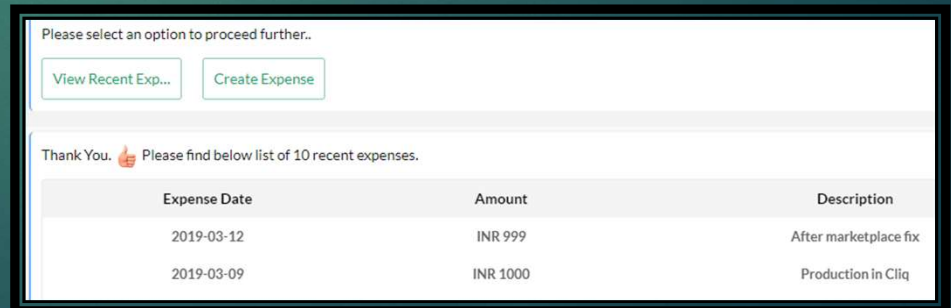


Note: INCOX Service doesn't store any application information. The above permission is to execute actions you expect incoxBot to perform on Applications.

- Once an application is authorized, you will see the **various actions for the applications to be done**
 - Below are the **root options for Zoho Books**
- **Click one of the buttons & choose the appropriate action for the incoxBot to execute. Like-wise proceed with other options/applications.**



'Create Invoice' Action



'View Recent Expenses' Action

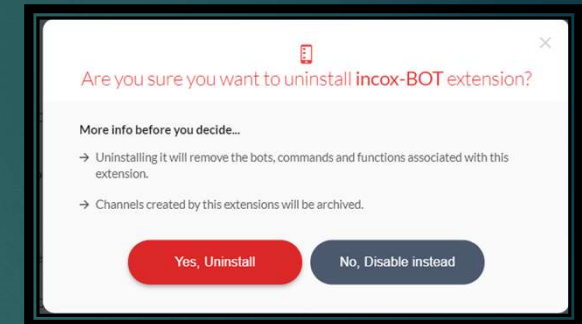
- **To un-install 'incoxBot', click the plug icon on top right corner of Cliq Window**



- **Click 'incox-BOT' under 'Installed Extensions' and then click 'Uninstall' on the sliding window as per below snapshot**

Name	Published Version
incox-BOT	1.1

Name	Installed to
Bitbucket	Everyone
incox-BOT	Everyone



Click 'Yes, Uninstall'

Uninstallation of extension will remove 'incoxBot' for the entire Cliq Organization. However, there will not be any impact to the Application Data. Individual users can remove the incoxBot by choosing 'Unsubscribe' under 'Actions' drop-down on the lower right side of the Cliq Window.

For any issues, please e-mail contact@incox.net

