



New Features & Enhancements

Xgenplus: Advanced Enterprise Email Solution

Version 0.1

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12/13/2019

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Revision History

Version#	Implemented By	Revision Date	Page Affected	Reason
1.0	Mahima Jain	13 December 2019	All	Baseline

XgenPlus–New Features

User Level Feature

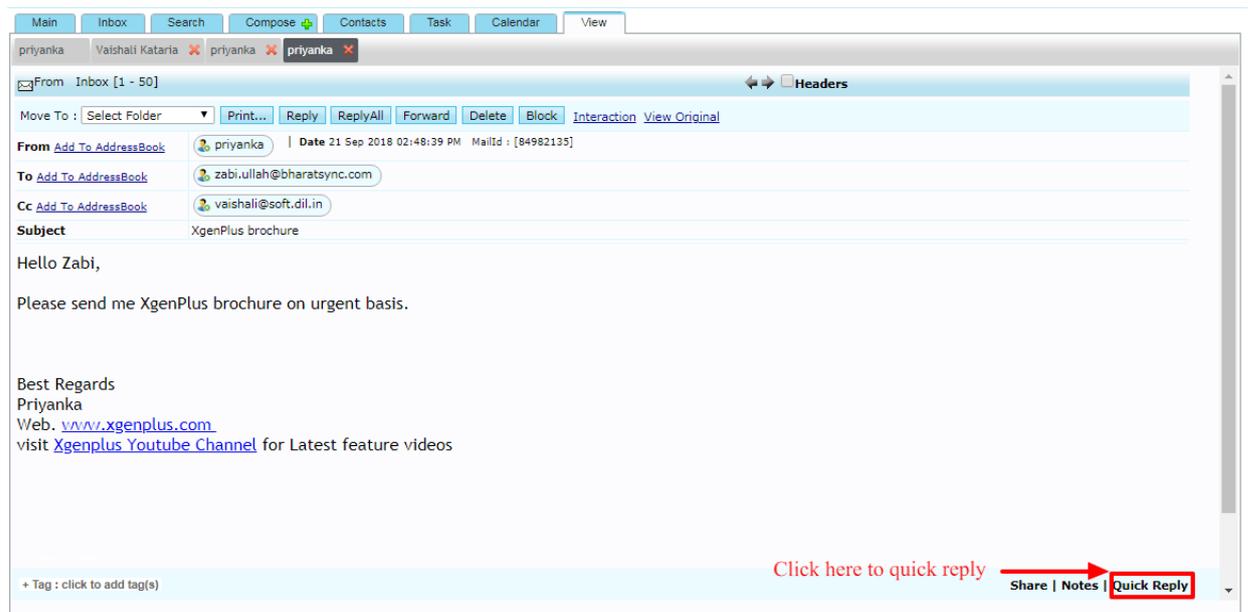
1. Quick Reply

Xgneplus Email are now filled with more enhanced feature of quick reply, user can send reply to the sender directly without hassle.

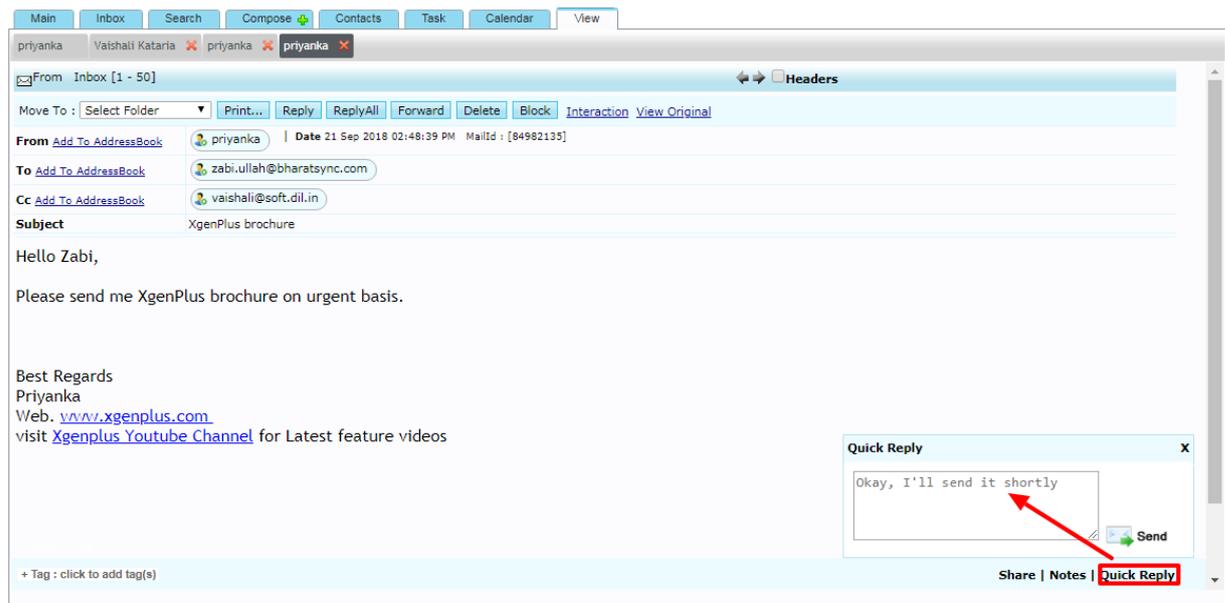
Inspired by the wide popularity of “Instant Action” we have added the “quick reply” button, so a user can send the quick reply to the Email without open in new window. User can type reply and simultaneously he/she can see complete mail. This saves time & gives user power to respond in a jitter.

Let’s see how it works?

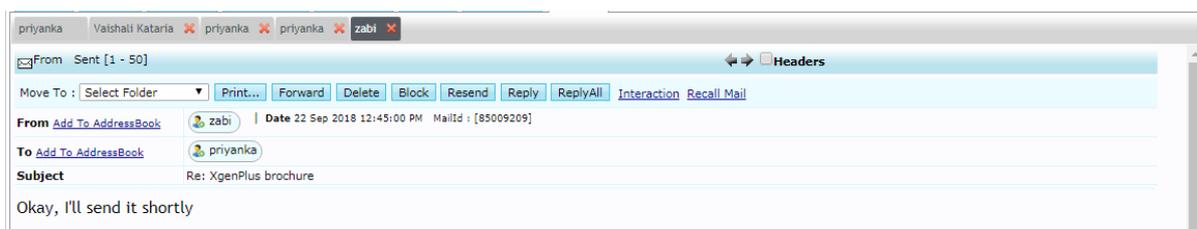
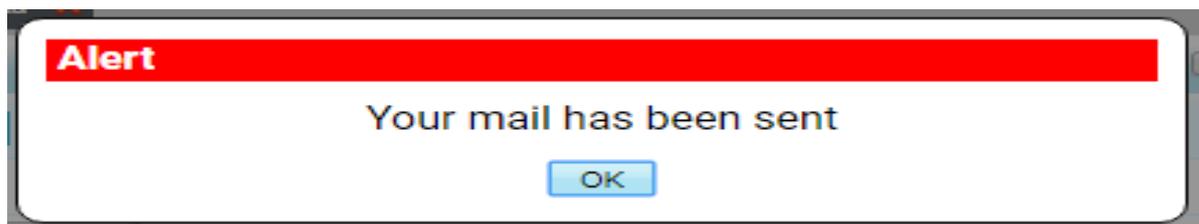
1. Once you receive email, open that mail. You will see an option of quick reply in bottom right of email Window.



2. The button appears at the bottom only when you are viewing a message thread or a single message, and not in your inbox
3. Click on Quick Reply, a popup screen will open in bottom right. You can type your message in that.



4. Once you type the message and click on 'send' it will be sent as an email to the recipient, it's easier than using a traditional 'Reply' Email option and takes nothing more than one click to do it.



5. Your sent message will reflect in the 'sent' folder. Using 'Quick Reply' it's easier to write a concise email to read through and understand, expressing shortage of time.
6. This quick reply will be sent to user who have sent that mail. It will not be sent to the users that are in "cc" & "bcc".

For more details check [Video Tutorial](#).

2. Move Email to another folder with Tag

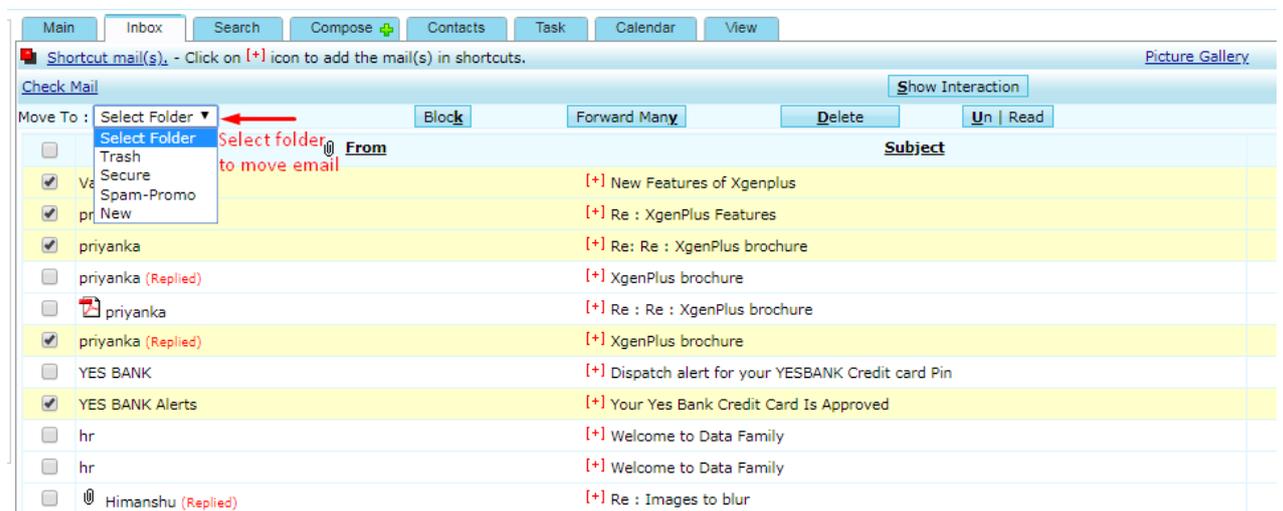
(Identify from which folder email has been moved)

Xgenplus makes it very easy to organize your emails. ‘Move to folder’ option enables users to move specific emails to another folder.

In way to enhance this feature, now user can identify from which folder they have moved their emails. It will ease for users, if he wants to move emails back to the original folder in future.

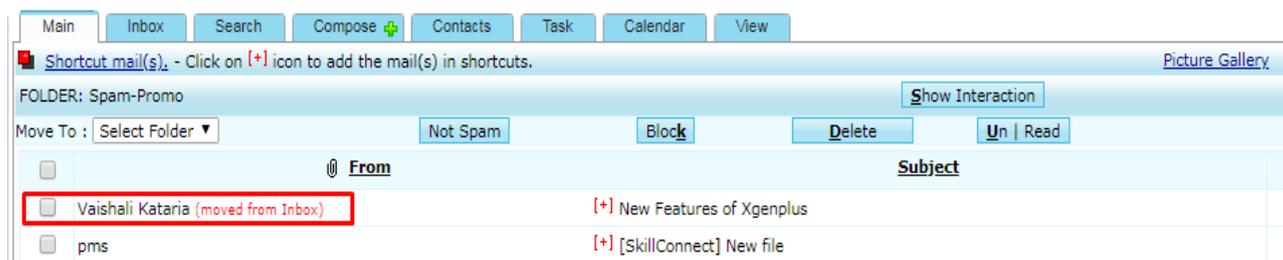
How it works?

1. When you move any email from a source folder to target folder. You select that email or multiple emails, select folder from the dropdown list of “Move To”, mail will be moved.
2. In target folder mail will be listed with a tag which indicates its movement from original folder



Let's take an example:

1. If a user moved an email from inbox to ‘Spam-Promo’ folder like in below figure. When he opens the ‘Spam-Promo’ folder, the moved email will display in the list with tag that tell us about its origin folder.



Now again if the same Email is moved back to inbox it will show in the inbox having tag ‘moved from Spam-Promo’ folder.

Main | Inbox | Search | Compose + | Contacts | Task | Calendar | View

Shortcut mail(s), - Click on [+] icon to add the mail(s) in shortcuts. [Picture Gallery](#)

Check Mail [Show Interaction](#)

Move To : Select Folder ▼ | Block | Forward Many | Delete | Un | Read

<input type="checkbox"/>	From	Subject
<input type="checkbox"/>	Vaishali Kataria (moved from Spam-Promo)	[+] New Features of Xgenplus
<input type="checkbox"/>	priyanka	[+] Re : XgenPlus Features
<input type="checkbox"/>	priyanka	[+] Re: Re : XgenPlus brochure

3. Tags

While sending an email user can set Organization level pre-defined TAG on that Email, which enables all the recipient of that email to search that email by using that TAG itself. This capability also automatically clubs all emails together with specific TAG irrespective of sender or subject. User can also set his personal TAGs also from Settings-Default-Email Tag-Add Tag option.

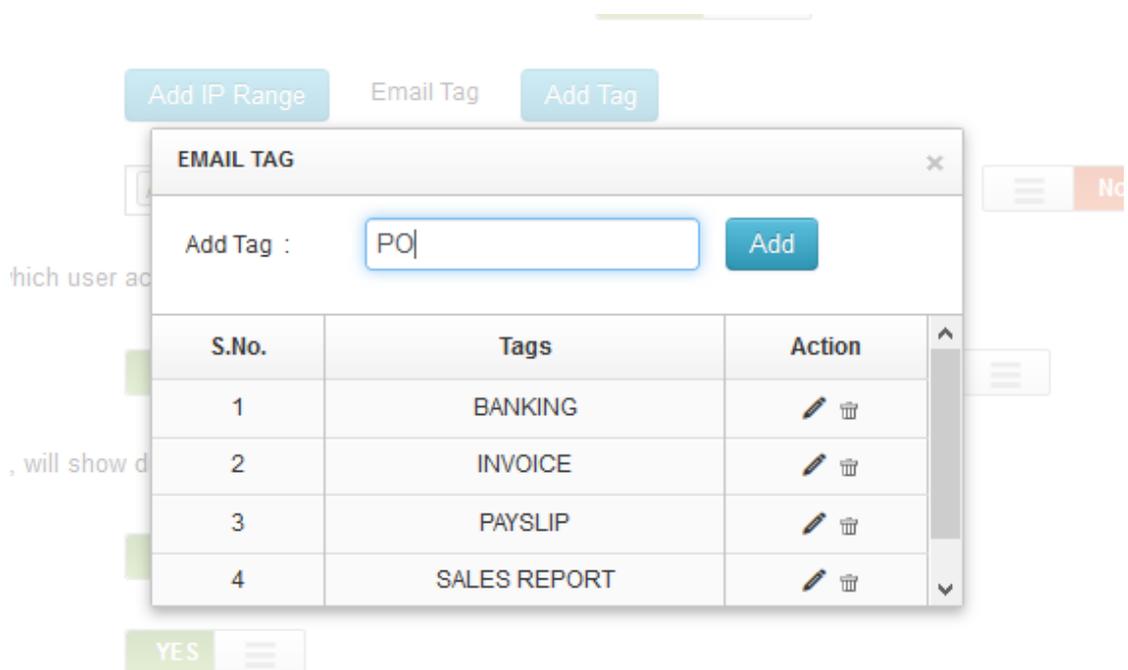
For example, there are many sales people who receive Purchase order (PO) from customers and then send it to accounts department for billing. Now with TAG feature, all sales team members with their own email address can send a PO to billing team by putting a TAG as PO. Now accounts person or sales team can pull all emails together which are tagged as PO.

At Domain Side:

Domain admin can add generic tags that can be used at the time of sending email. For adding tag domain admin can go to the

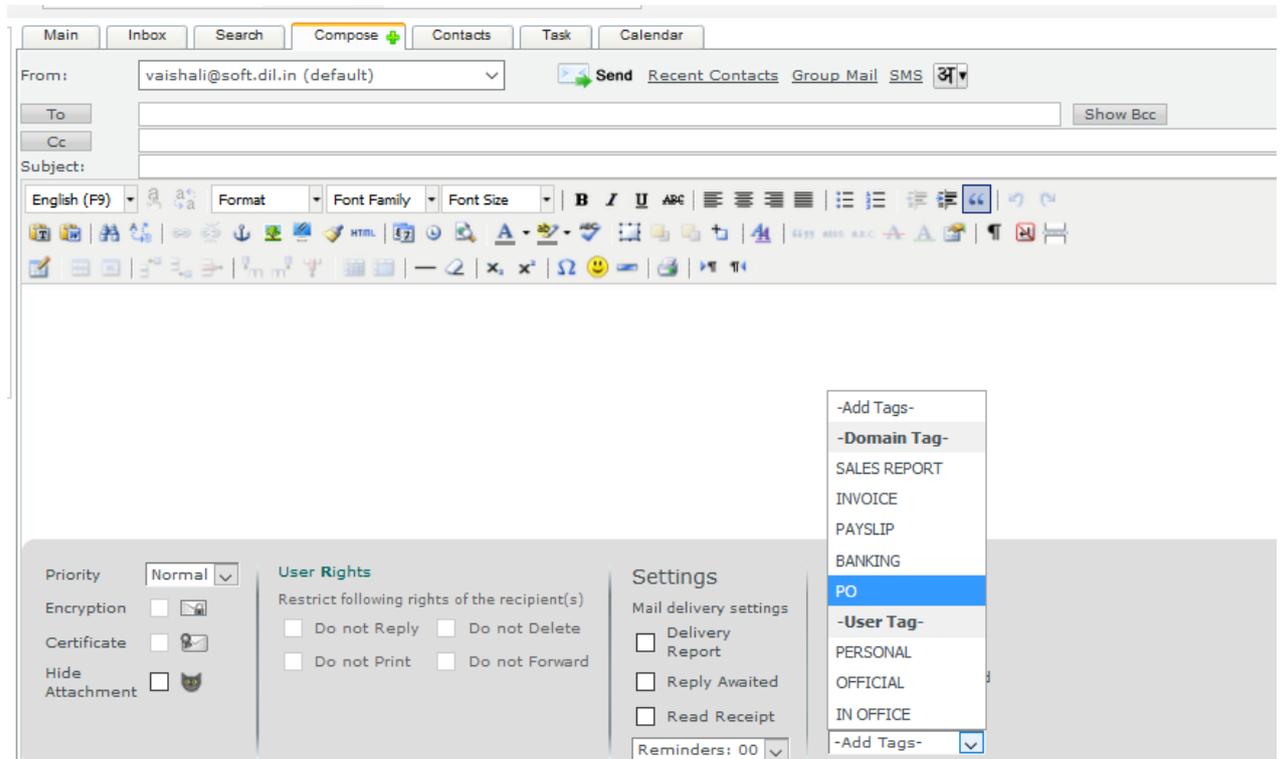
Edit domain->domain options

Here they will get <<Add Tag>> option. On click of Add Tag, domain admin can write down name of the tag and can add it. They can Edit/delete existing tag.



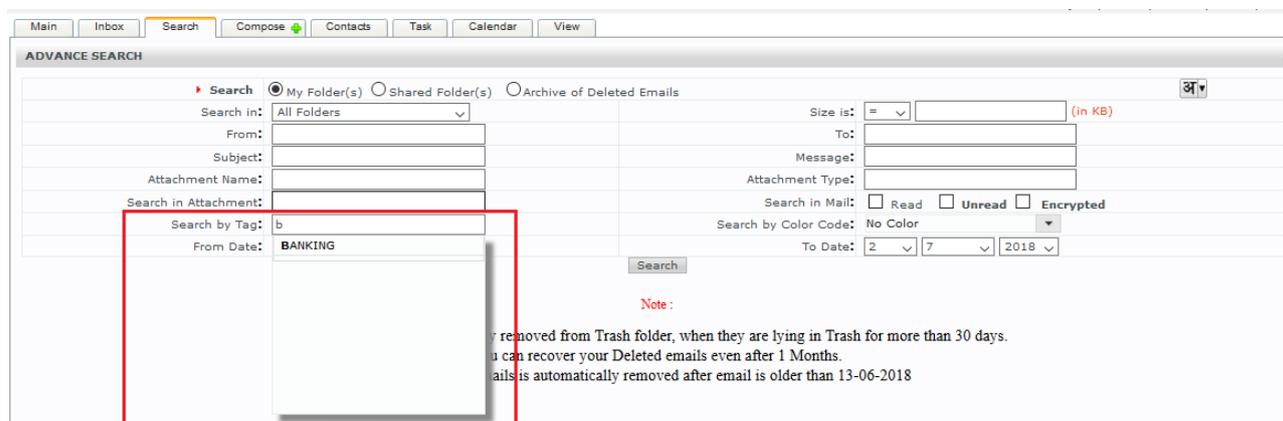
At User End:

These tags will display at user end. At the time of composing email, user can click on advanced setting and can use tag.



At the receiver end, added tag will display and receiver can also search this mail with same tag.

For E.g if sender has used tag “Banking” at the time of sending email. Then at the receiver end, receiver can see that tag in the bottom of email as well as receiver can search that same email in search section by selecting criteria “Search By Tag”.



If receiver search email by Tag “Banking”, then all the mails related to that tag, will come in resultant list.

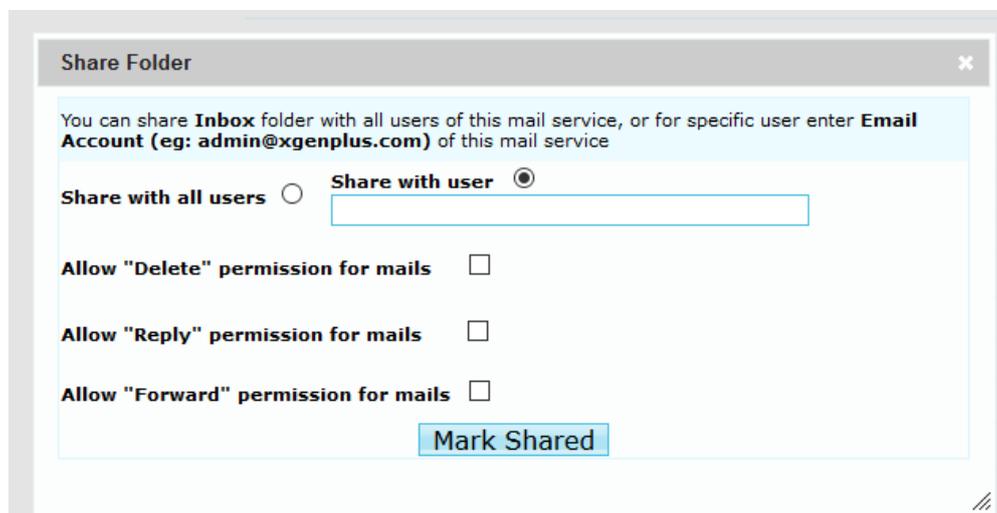
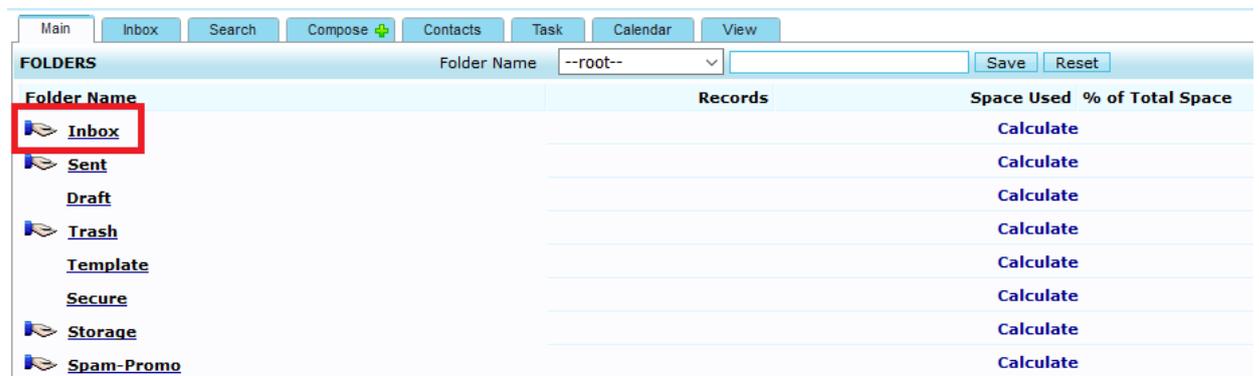
4. Give Access of your Account

Now you need not to worry about your important mails while you are on Holidays or any other business trips. You just authorize your subordinates or your agents to receive your emails and they can reply on those mails on your behalf without sharing login credentials of your account.

The Beauty of this feature is, this reply message will not be saved in their sent folder. It will be saved in your sent folder only. So whenever you access your email, you can check all the replies that your subordinates/agents have done on your behalf.

Let's see how this feature works:

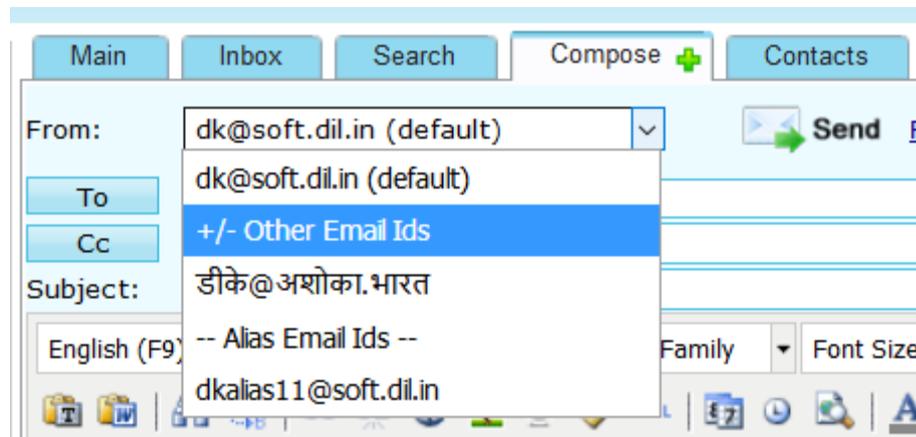
1. Suppose the person "John" is a Business Analyst. John is going on holidays. Now how his client's emails will be taken care?
2. "John" gives authorization to DK (Team member) to access his emails, so he can reply on those emails on the behalf of John.
3. John will share his inbox with DK with access rights. For this go to Folders. There is hand icon in front of each folder to share folder.
4. If John wants to share only "Inbox", then he will click on hand icon in front of "Inbox" folder.



5. John will enter email address of DK to share inbox with him. Now John can set access right for DK while sharing his folder. He can give rights like:
Allow Delete, Reply, and Forward. Now if John gives rights for only Allow Reply, then DK can reply on those mails only. He cannot Delete/Forward mails from John's inbox.
6. Once inbox will be shared, DK can see this inbox in his mail account with other folders. There is a category of Shared folder in folder section. All shared folders will display here. DK can access the entire shared folder and can work accordingly.
7. Multiple users can share their account with multiple people.

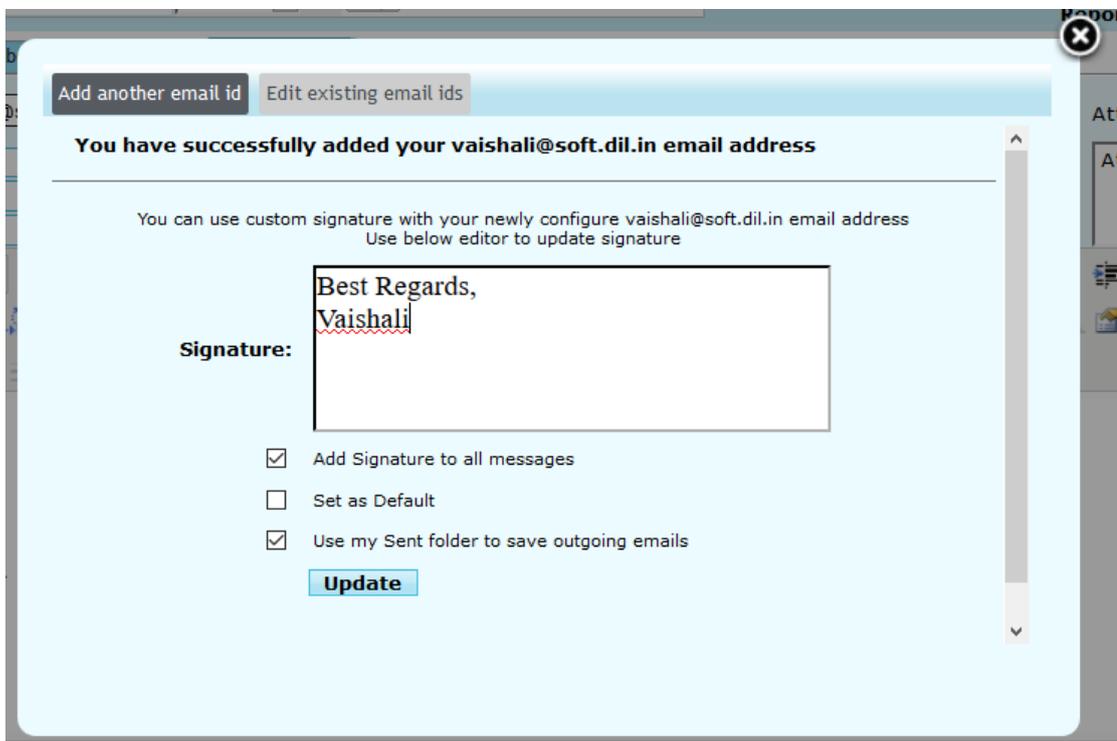
Now let's see how mails will be sent on the behalf of John and how it will be saved in John's sent folder.

1. To get access from John for sending emails on the behalf of him, DK will click on Add Email Address from the dropdown of FROM ID while compose email.



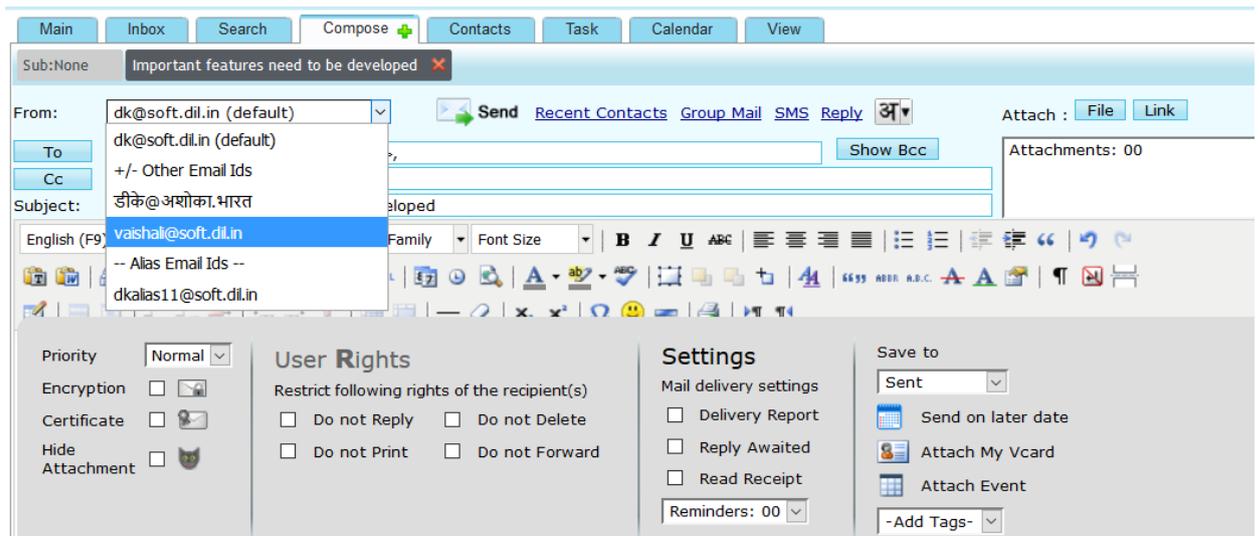
2. After click on +/- Other Email ID, dk will get screen where he can enter Name & Email Address of John.

4. Once code has been entered by dk, a dialog box will open to set Signature & some settings. These settings will be:
 - Add Signature to All Messages (This signature will be sent, whenever dk will send emails by using outgoing ID of John or will send emails on her behalf.)
 - Set as default (DK can set default outgoing email ID of John by this setting)
 - Use My sent folder to save outgoing emails. (If this setting has been enabled then all the emails which dk is sending on the behalf of John, will be saved in John's sent box)



How Emails will be sent?

1. To reply on emails which has been received in John's inbox, DK first open shared inbox of John and click on the mails on which he wants to reply.
2. After click, dk select from ID of John (from which mails will be sent)



3. Once email has been sent, it will be received by receiver, with this display name: dk (Display name set by DK) on behalf of John. So, receiver will get to know that this mail has been sent by dk.
4. Also, this sent mail will not be saved in DK's sent folder. It will be saved in John's sent folder only. In future he can rectify which email has been sent to his client.

This feature will remove all the hurdles to manage important emails without sharing login details of your account.

5. Update Contact List

Contacts:

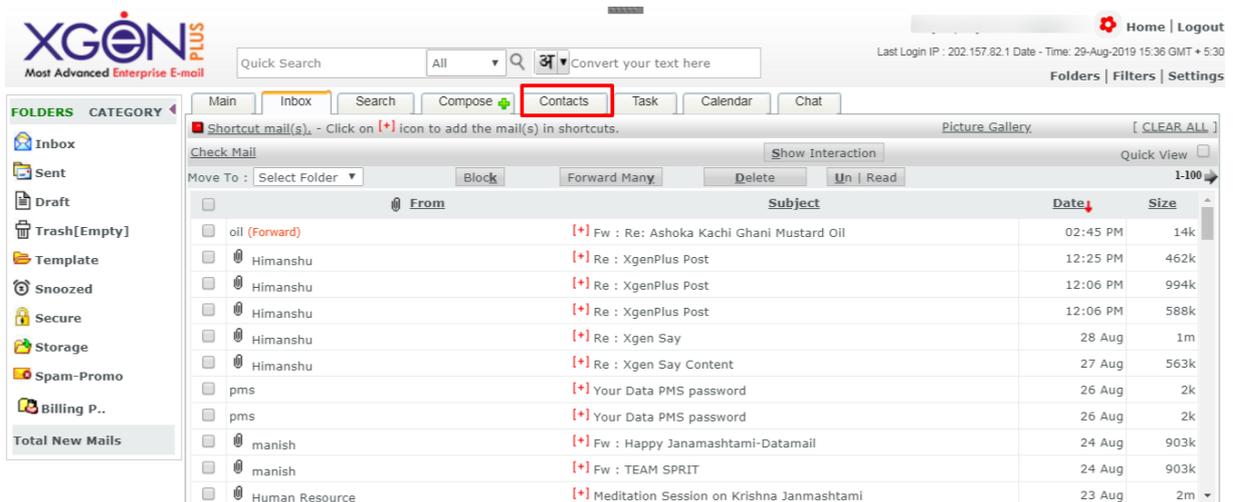
As Business connections grow day by day, it's important to maintain up-to-date information about your contacts. Contact Update feature help you to keep your contact list maintained & updated. Each contact's information can be updated automatically at any time with **Contact Update Option** in **XgenPlus Email**.

Steps:

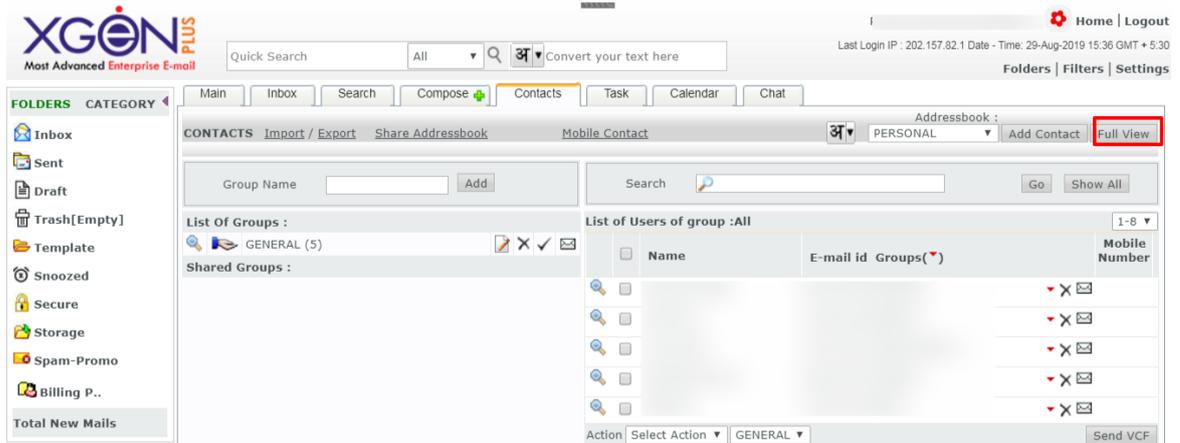
1.Login XgenPlus Email Account.



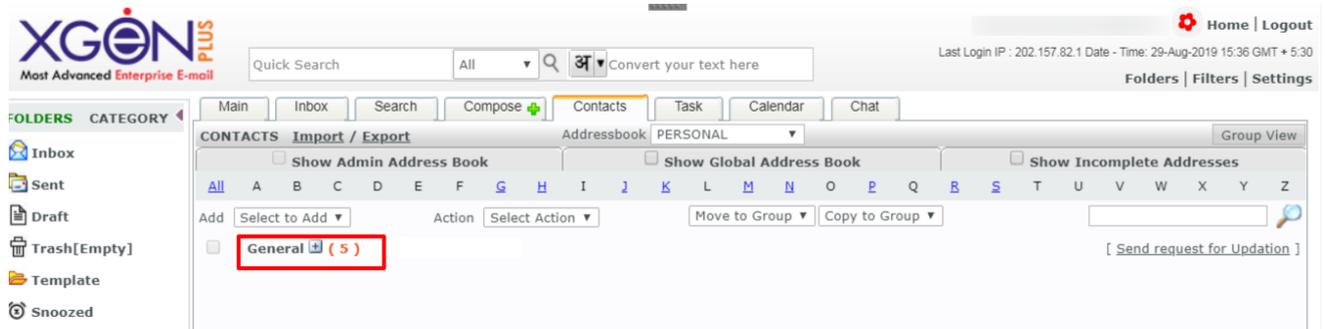
2.Select Contact Option from the Tab.



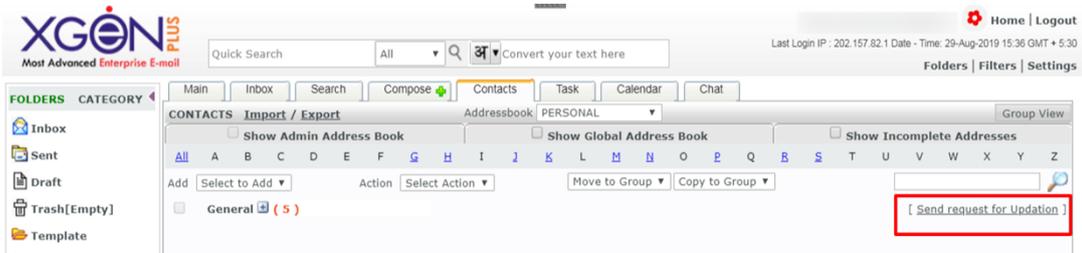
3.Click the Full View Option.



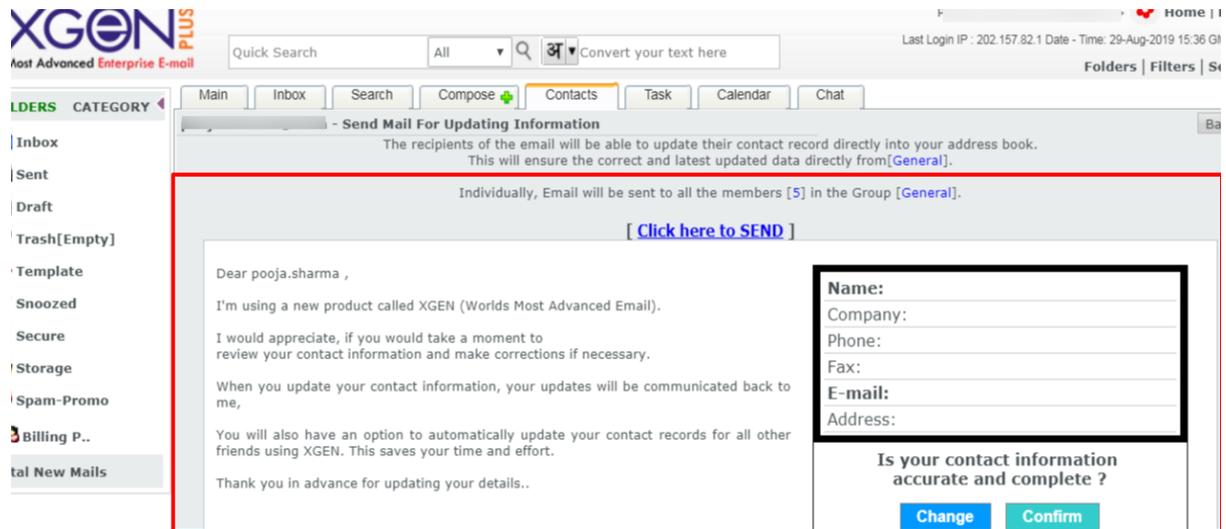
4. Select the group whose contacts you want to get updated.



5. Click on 'Send Request for Updation' option.

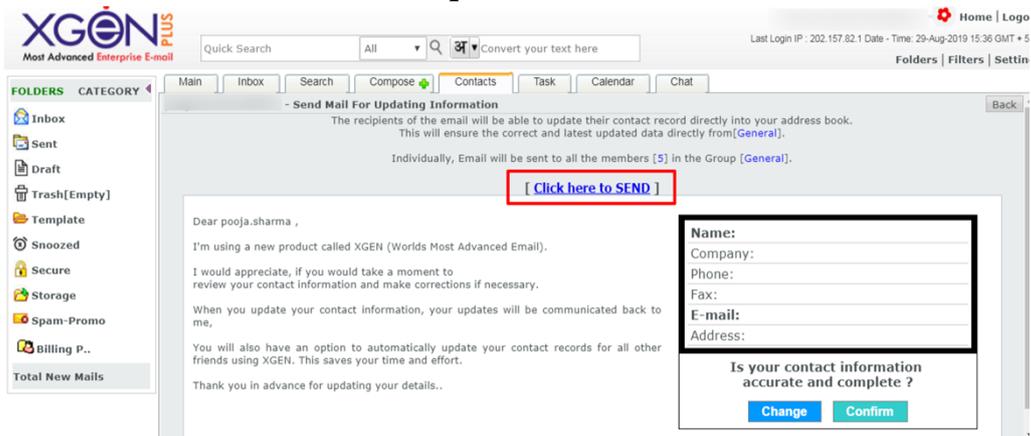


6.A Message Box Will Appear Where You Can See the Message Which Other Person will receive.

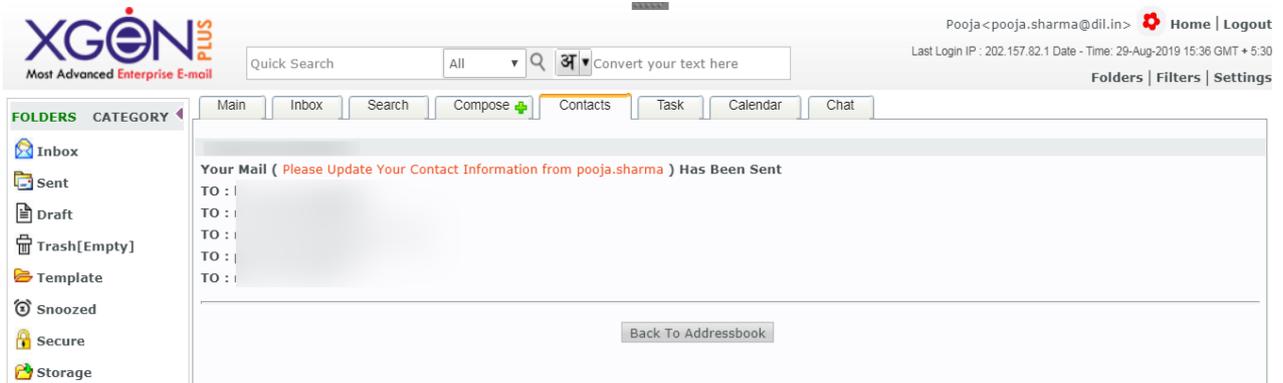


Now the contacts can view the already filled details. If any information mis-matches then they can update the information.

7.Click On ' Click Here To Send Option'



8. After Sending Request To All The Members You Will Receive A Confirmation Message About The Same. Here You Can See The List Of Contacts To Whom You Send Updation Request.



Once the contacts will update their information, the updated information will be automatically saved in the contact book.

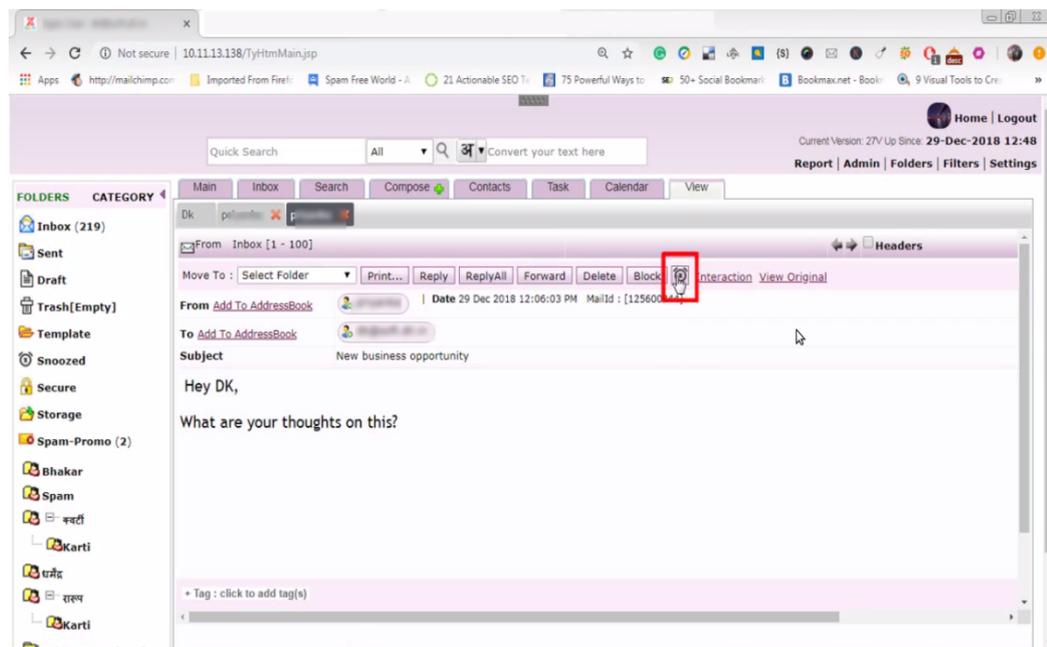
6.How to snooze E-mails

Snooze emails enable you to temporarily remove selected emails from inbox until you need them. You can always see your snoozed emails under Snoozed folder.

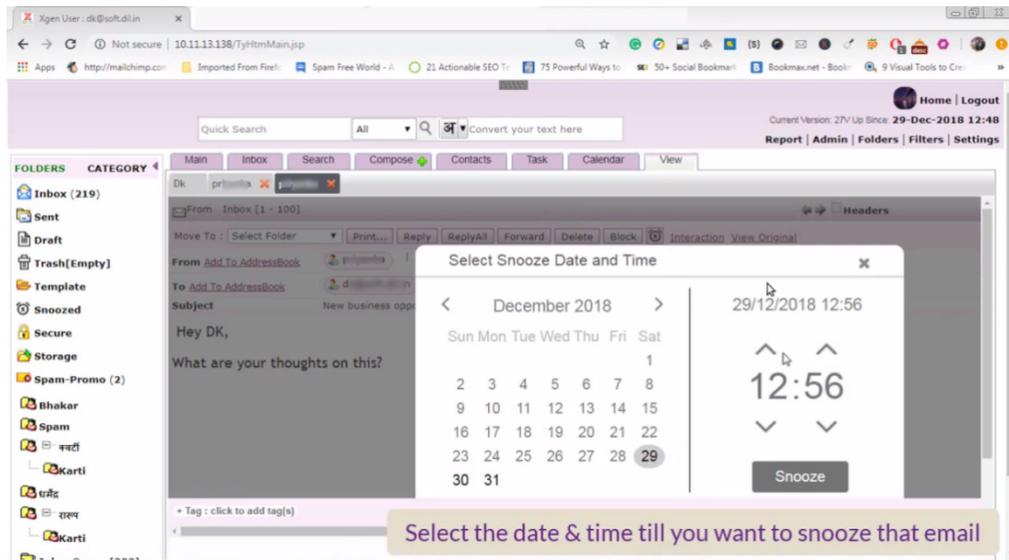
You can snooze any email that you want to follow up later whether hourly, daily, weekly or monthly. You can set your desired time on selected email to remind your important email on the set time.

Snooze emails or set reminders

1. Open or select your email and click on the ‘Snooze’ option

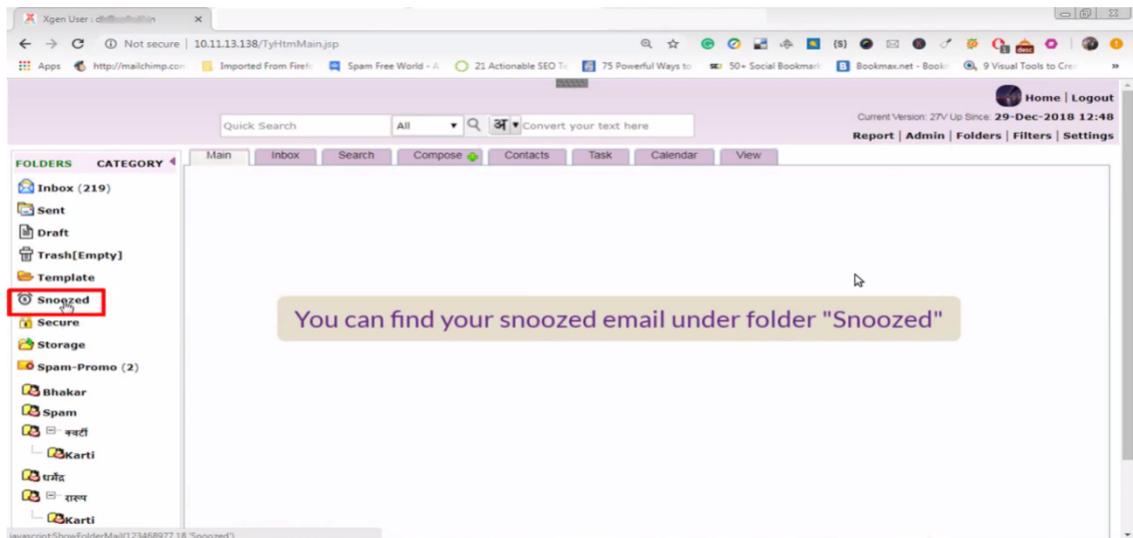


2. Now you can set Date and time in which you want to see the snoozed email.



3. Click on 'Snooze' option, now your reminder is set.

You can see your Snoozed emails in the Snoozed folder on the left side of Xgenplus folders.



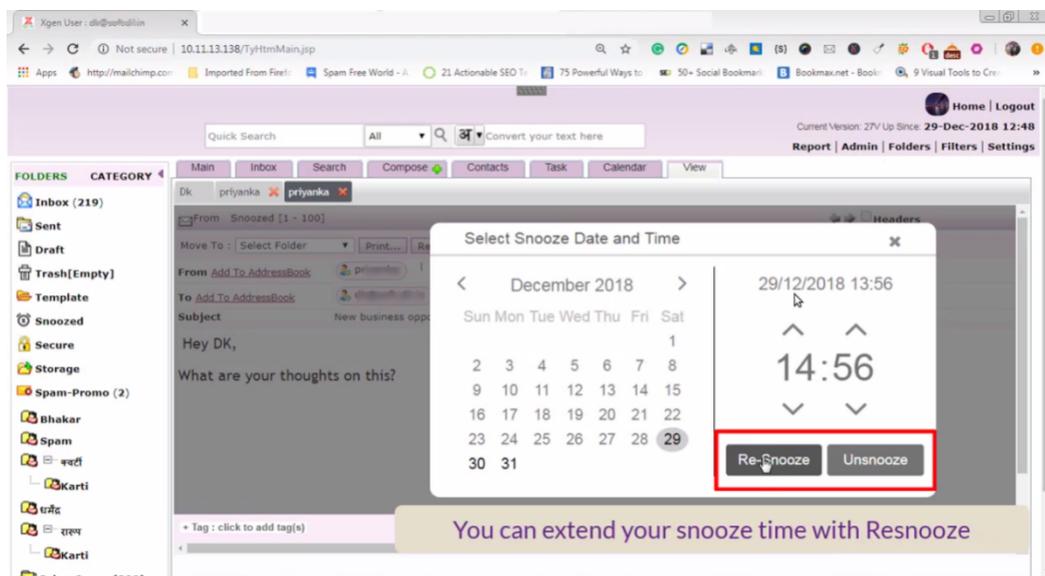
How To Resnooze or Unsnnooze Email In Xgenplus

Resnooze- Allows user to create recurring email reminder. Resnooze is the self maintaining tool, when a reminder bothering too much it can be reset or resnooze for the next time.

Resnooze is a well designed reminder feature in xgenplus that makes users easy for remind tasks daily, weekly, monthly and so on.

Steps-

1. Go to the Snoozed folder to reset reminder
2. Select snoozed email
3. Set your desired time or month for a reminder

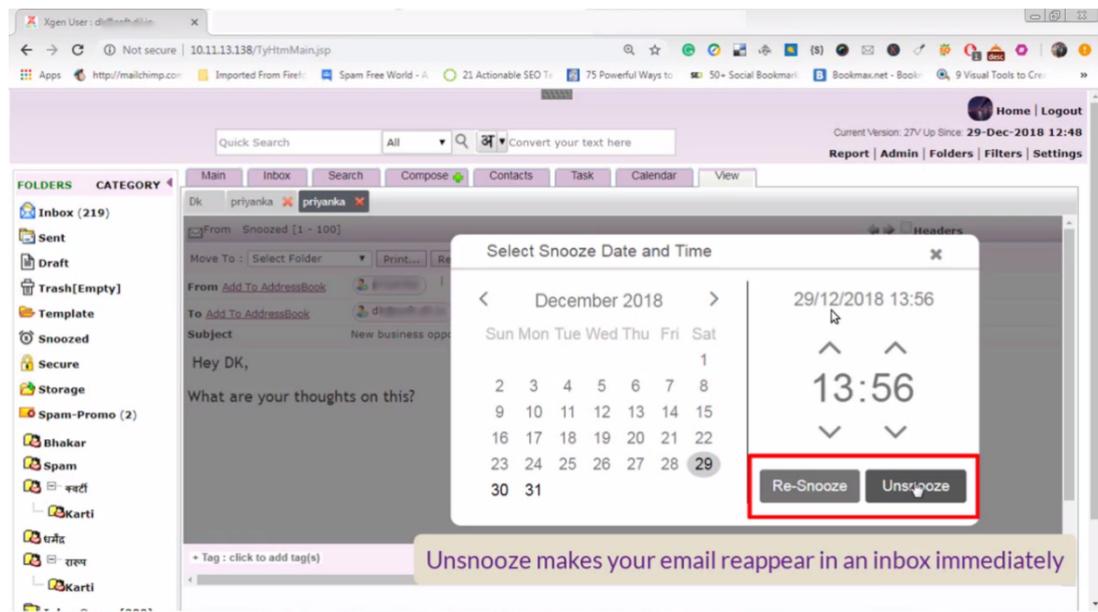


4. Click on 'Resnooze' option, now your email is resnoozed.

Unsnooze- Allows users to remove reminders on snoozed emails.

Steps-

1. Go to the Snoozed folder
2. Select snoozed email to remove the reminder
3. Choose unsnooze option to clear reminder



4. Click on 'Unsnooze' Option and the mail be unsnoozed.

7.How to Enable Out Of Office/ Set Vacation Email/ Auto Reply Email

An auto reply response is pre-designed reply to an email. Out of office enables user to send an automated reply when user is not available in office or at workplace. When a user go on vacation and take a week off from work, user can set an auto reply or default email for everyone.

User can manually turn it on, using time, dates, and week days as per their criteria.

Out of Office Xgenplus:

User can set an auto reply or out of office email reply in two ways. In out of office user will get two options-

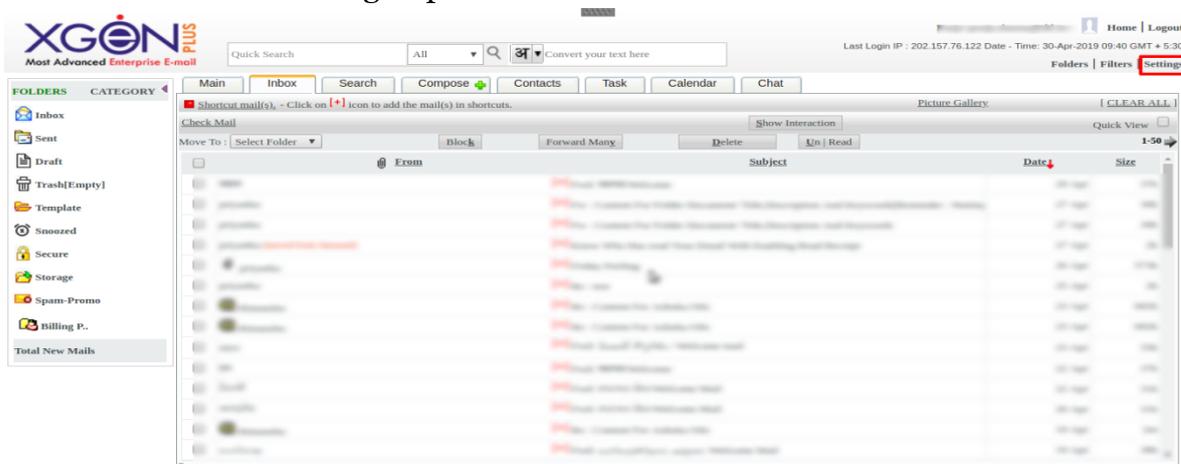
1. **My Organization**
2. **Other Organization**

1. My organization- when user wants to give an auto reply to an email within the organization when he/she is not available in the office, then user can select 'my organization's option. And can set auto response for sender.

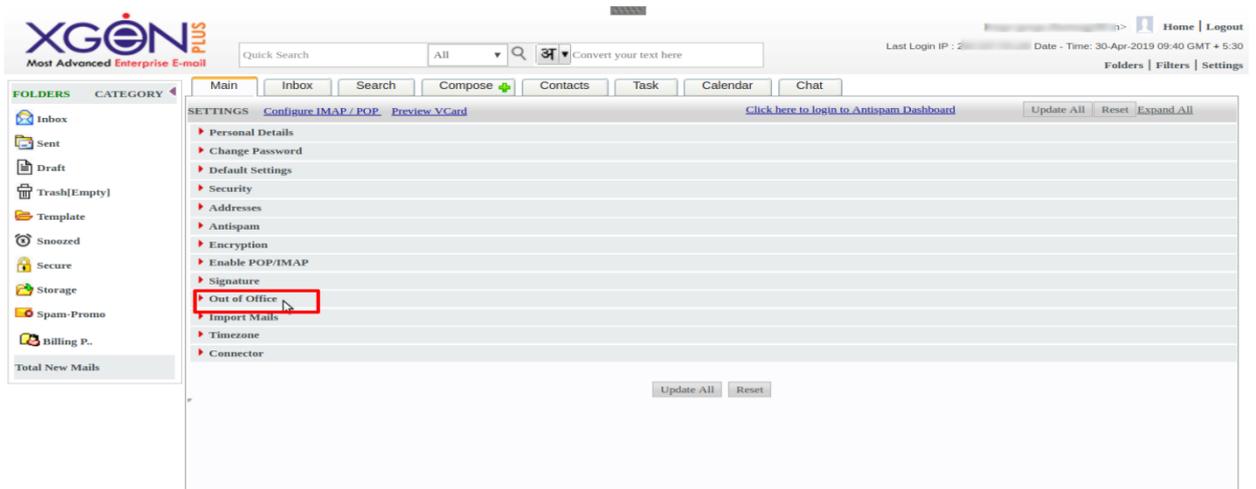
2. Other Organization- when user wants to give reply to clients, friends or other members out of the organization then user can select 'other organization' option. And can set auto response for other organization's members.

Set up out of office in Xgenplus:

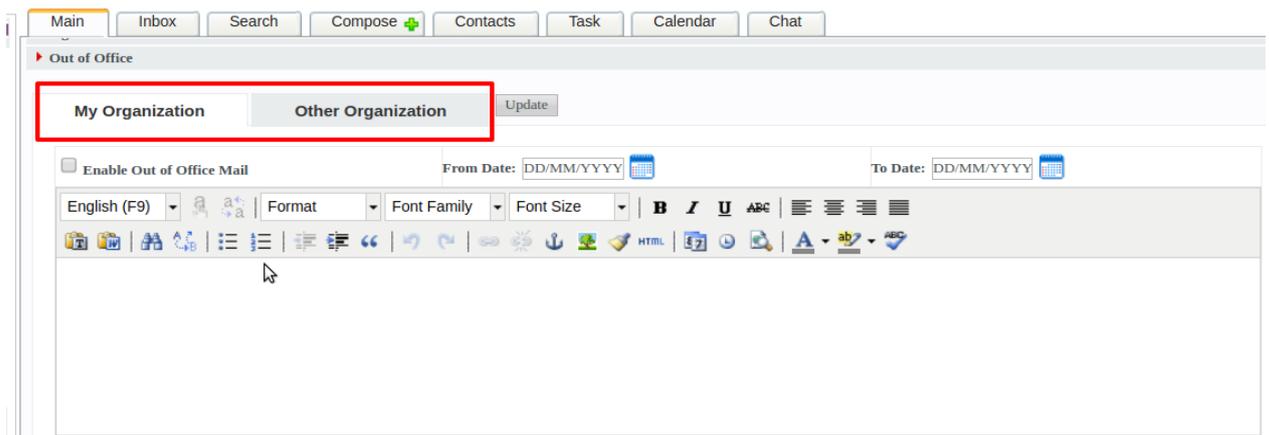
1. Click on the 'Settings' option.



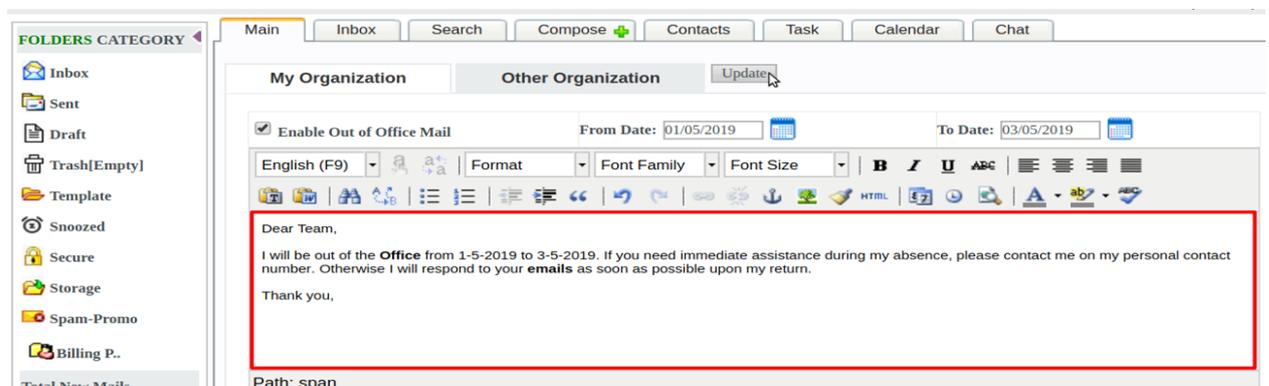
2. Select 'out of office' from the list that appears in left handed column.



3. Select criteria- My organization or Other Organization



4. Type preferred message in Mail Body.



5. Select Time Period and Start and End date.

The screenshot shows the XGEN Plus interface for configuring an Out of Office mail. The 'Enable Out of Office Mail' checkbox is checked. The 'From Date' is set to 01/05/2019 and the 'To Date' is set to 03/05/2019. The email body contains the following text:

Dear Team,
I will be out of the Office from 1-5-2019 to 3-5-2019. If you need immediate assistance during my absence, please contact me on my personal contact number. Otherwise I will respond to your emails as soon as possible upon my return.
Thank you!

Path: span
Note : For each sender only one Auto Reply will be sent in a day.

javascript:onclick=setActiveStyleSheet(this, 'win2k-1')

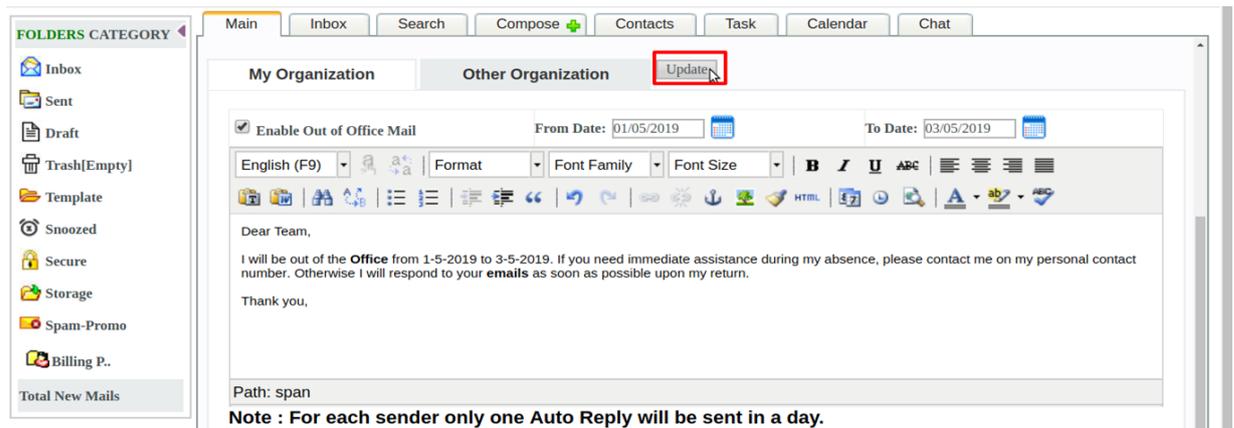
6. Click on 'Enable out of office mail'

The screenshot shows the XGEN Plus interface for configuring an Out of Office mail. The 'Enable Out of Office Mail' checkbox is checked and highlighted with a red box. The 'From Date' is set to 01/05/2019 and the 'To Date' is set to 03/05/2019. The email body contains the following text:

Dear Team,
I will be out of the Office from 1-5-2019 to 3-5-2019. If you need immediate assistance during my absence, please contact me on my personal contact number. Otherwise I will respond to your emails as soon as possible upon my return.
Thank you!

Path: span
Note : For each sender only one Auto Reply will be sent in a day.

7. Click on the 'Update' option



When an email is received within organization or the other organization, within the Set Time range then they will get the pre formatted auto response on that email.

8.Login

Once you installed and configure XgenPlus you can sign in through email address and password, created by administrator. With XgenPlus Sign in can be done through various methods.

Through Email ID & Password

Email ID and password will be provided by administrator to the user after creation of email account. After submission system, will ask if user want to change password. They can do that accordingly as per the requirement.



भाषा चुनें: हिंदी

उपयोगकर्ता नाम: ओटीपी प्राप्त करें
vaishali.k@bharatsync.com

पासवर्ड: पासवर्ड भूल गए?
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याद रखना

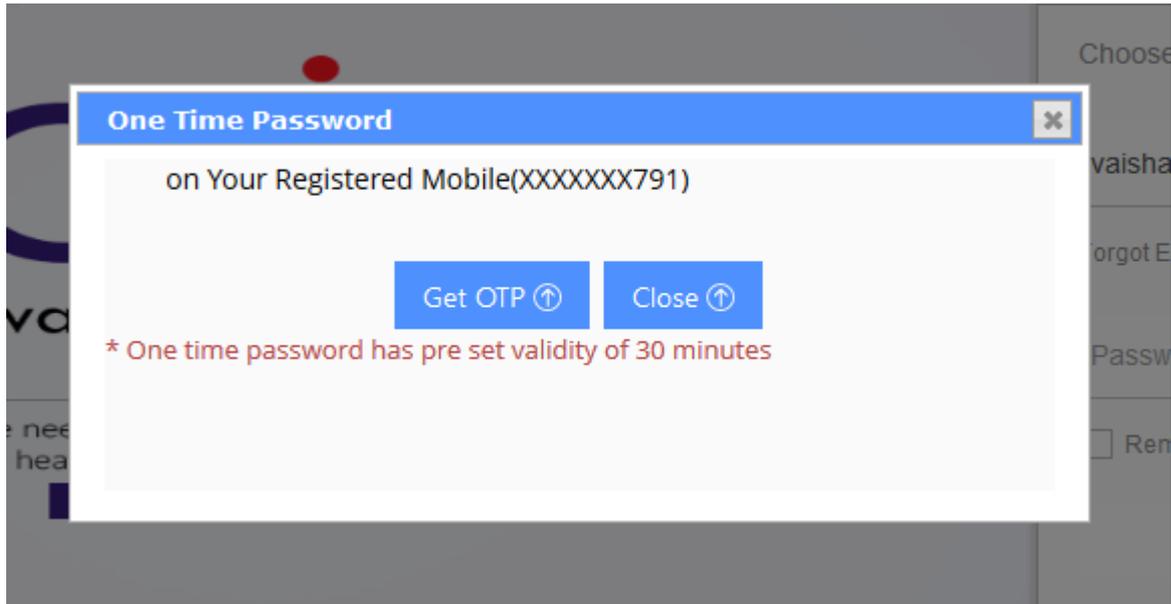
Powered by: www.xgenplus.com

Licensed to: BharatSync.com
D-47, Hanuman Nagar, Jaipur

Login through Email ID & Password

Through OTP

If user do not want to login through password, they can just use OTP for sign in their account. For this user need to select “Get OTP” option. After selection user will receive an OTP (One Time Password) on their registered Phone number.

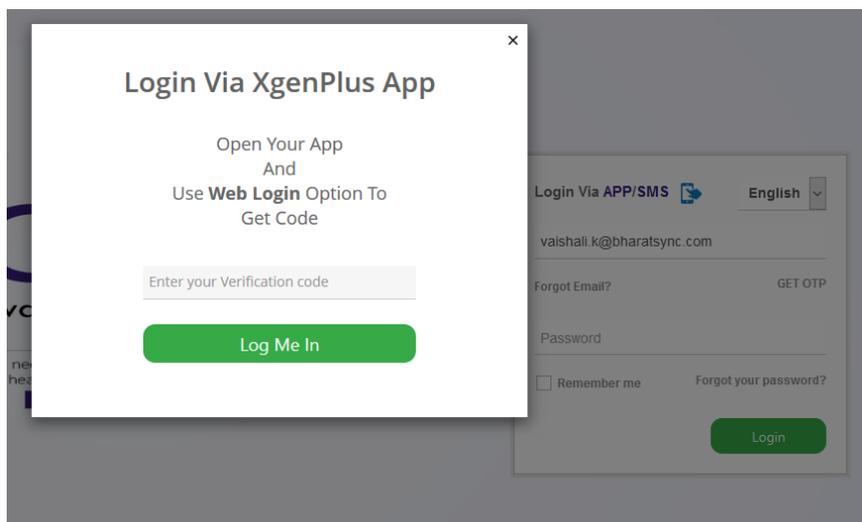


Via App

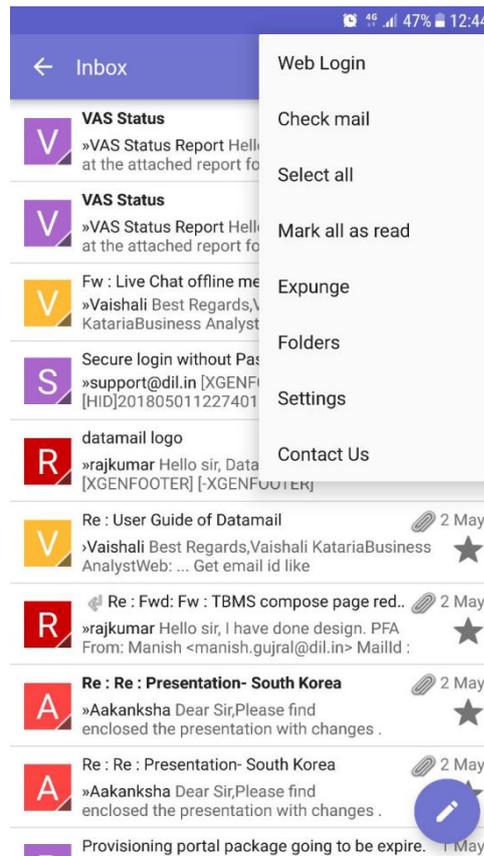
With this option, you need not to submit any password to login into your account. You can just login via a code that will be generated in your XgenPlus app.

How It Works?

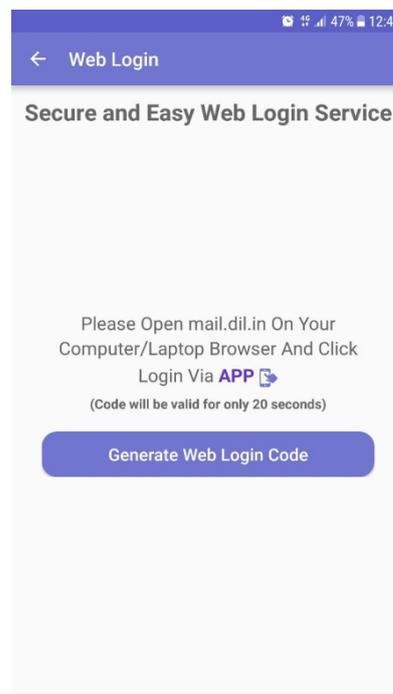
1. Click on Login via App, you will get a window in which you have to submit code that will be generated in your app.



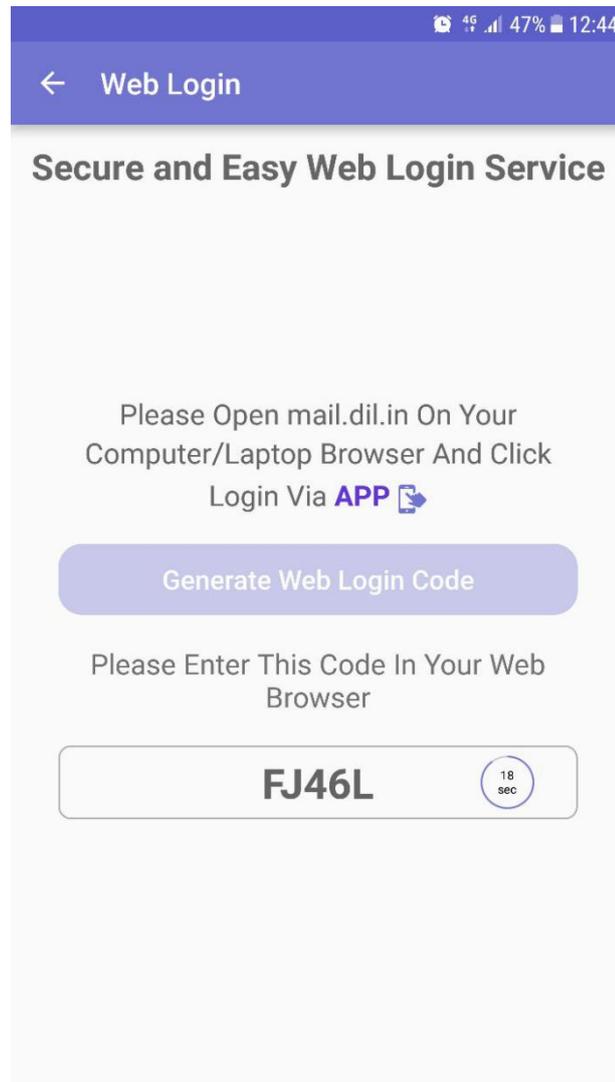
2. Now open your XgenPlus app, and go to the Menu. Select option **Web Login**.



3. Once you select web login, you will get a screen where you need to select option “**Generate Code**” to generate code for login via App.



4. After click on this, you will get a code and you can submit this on web for login process.



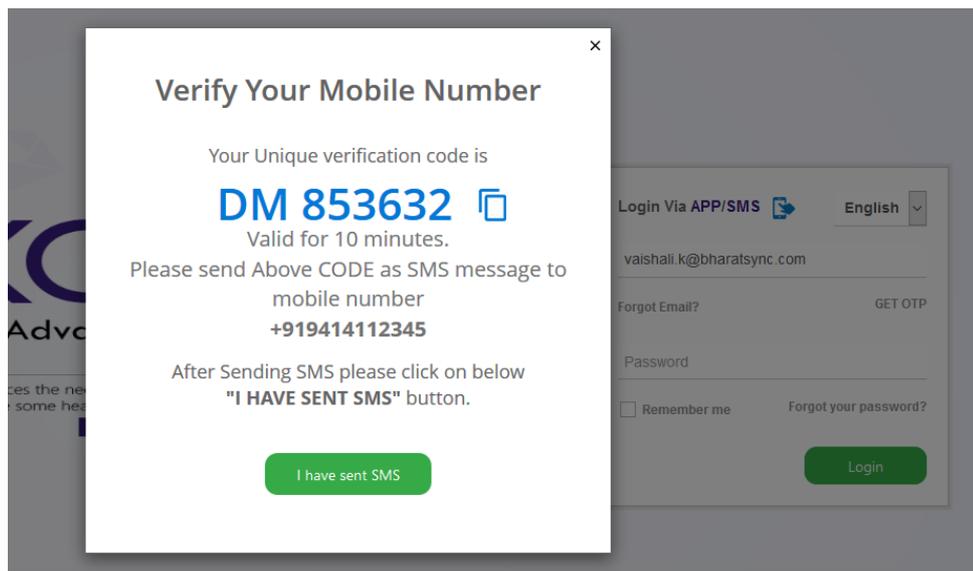
Via SMS

When you select option Login via SMS, then you will get a window with some random code. You must send this code from your mobile number to the given number on screen.

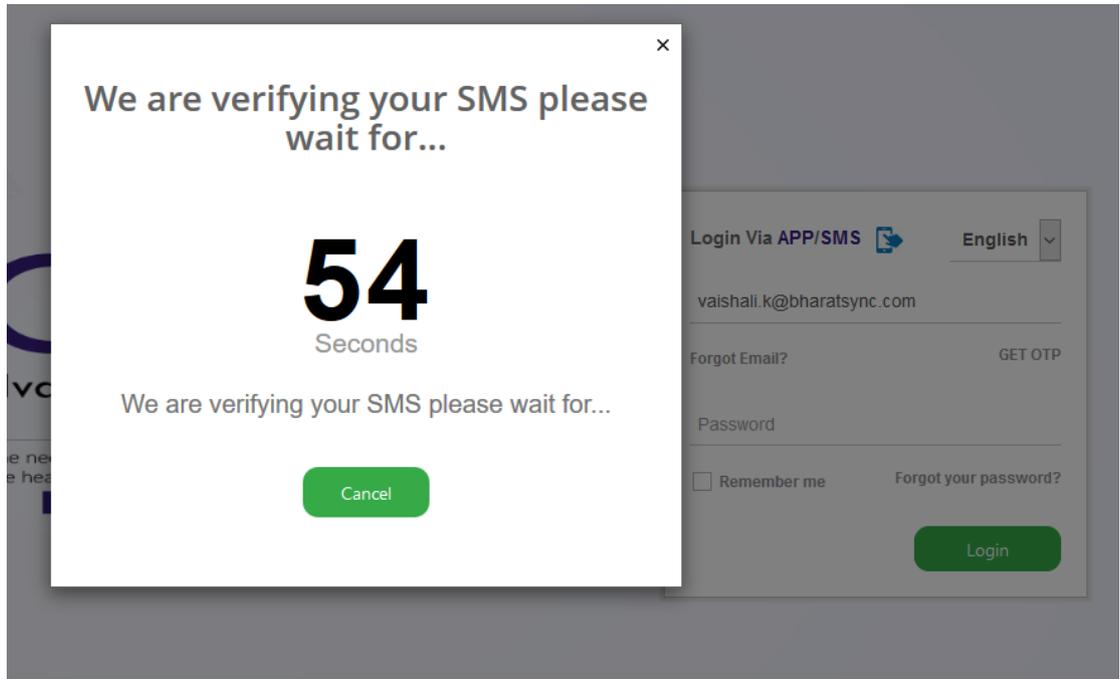
Once you send SMS, it will verify and will allow you to login into your account.

How it Works?

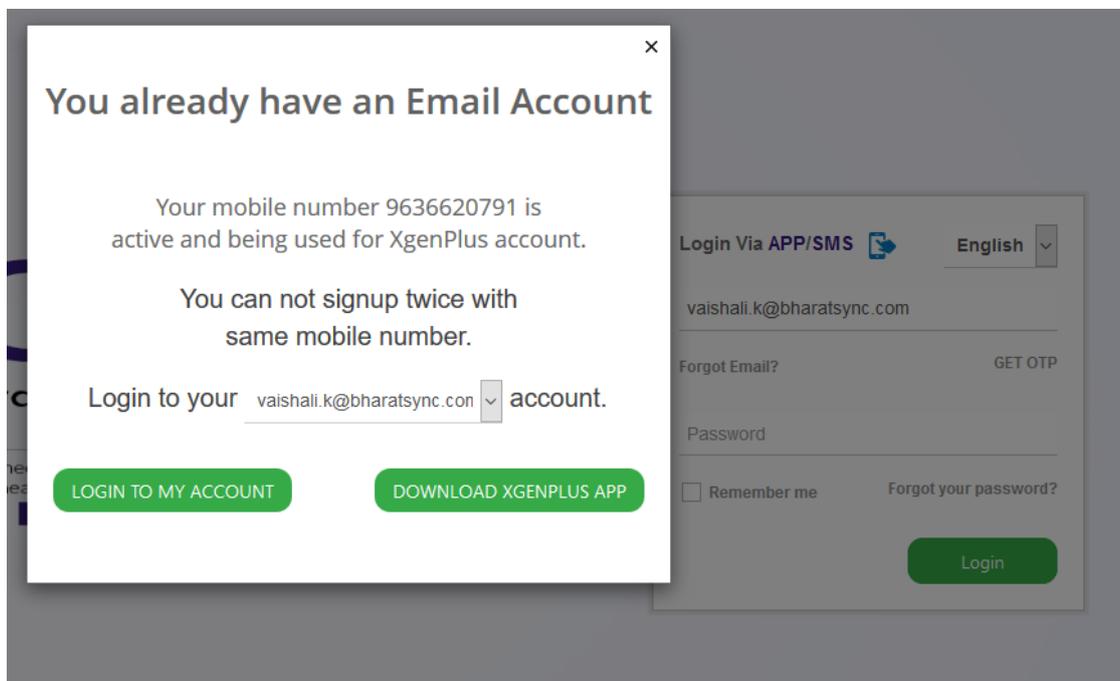
1. Click on login Via SMS, you will get a popup window with a code, that you need to SMS on provided number.



2. Once you send SMS from your mobile number, you must click on “**I have sent SMS**” now it verifies this.



3. If it will verify your number, then it will show list of accounts that you have with the mobile number from which you have sent SMS. So you can select email ID from the list and can login in to the account.



So your account will be logged in securely in a Jiffy without any password.

9.Three layer folder creation

User can create folder, sub-folder, sub-sub-folder for convenience. This feature has been revised to enable user segregate the mails under various headings so that it's easy for user to search for similar types of mails.

Create New Folder:

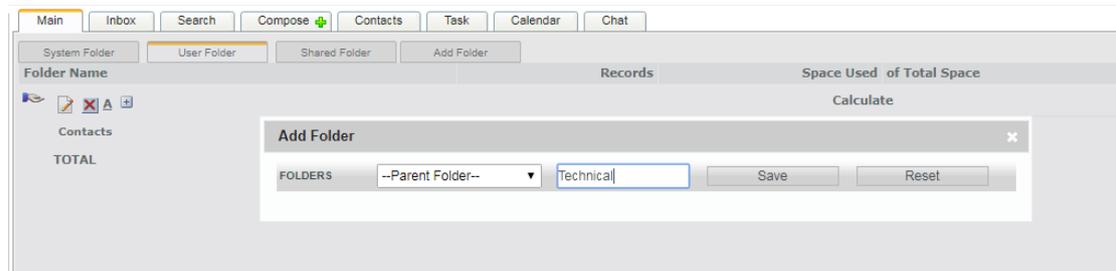
Go to the folder section, select Parent folder.

Under this folder select the folder under which you want to create sub folder.

Let's say, I want to create a folder Technical. Under technical I have various folders say, Software, Mobile, QA, Under Mobile I have various folders say iOS, Android etc.

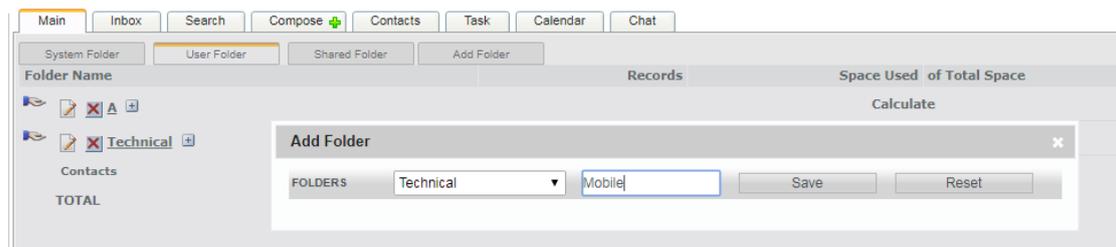
In this case,

Select "Parent Folder" and enter the name "Technical" and hit save. Technical Folder is created.



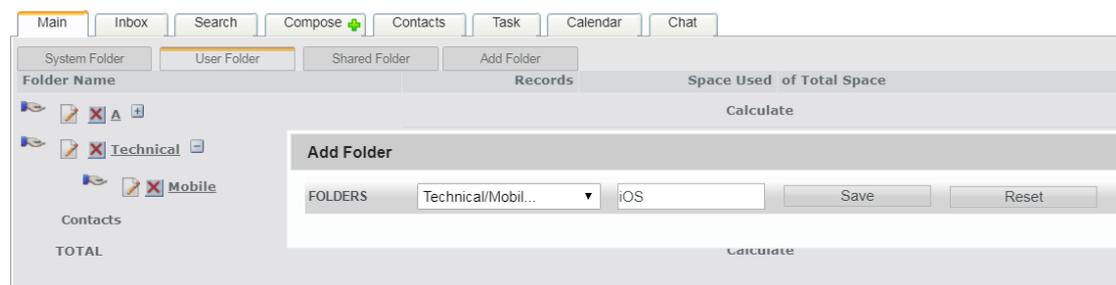
Now in parent folder select "technical" and correspondingly write "Mobile" and hit save.

Mobile folder is created under Technical folder.



Now in parent folder select "Technical/Mobile" and correspondingly write "iOS" and hit save.

iOS folder is created under Technical/Mobile folder.



Now the user will be able to see the System generated folder under “System Folder” Tab.

Folder Name	Records	Space Used of Total Space
<u>Inbox</u>		Calculate
<u>Sent</u>		Calculate
<u>Draft</u>		Calculate
<u>Trash</u>		Calculate
<u>Template</u>		Calculate
<u>Snoozed</u>		Calculate
<u>Secure</u>		Calculate
<u>Storage</u>		Calculate
<u>Spam-Promo</u>		Calculate
TOTAL		Calculate

Now the user will be able to see this folder under “User Folder” Tab. iOS folder under Mobile folder under Technical folder.

Folder Name	Records	Space Used of Total Space
<u>Technical</u>		Calculate
<u>Mobile</u>		Calculate
<u>Ios</u>		Calculate
Contacts	Z	3.5(KB) 0.01
TOTAL		Calculate

Shared folders are the folders shared by other people.

Shared Folder
<u>Test/Test@hemantgajraj@datamail.in</u>

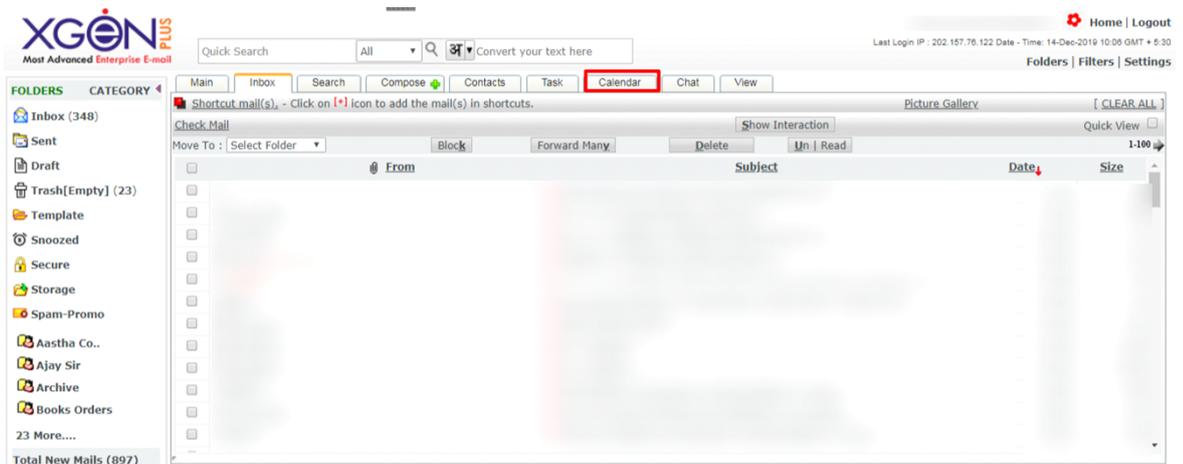
10. Schedule Meeting

Xgen Calendar is a Business Calendar, designed to ease creating & scheduling business meetings. XgenPlus Calendar helps User to create execute and record of Meetings. User can invite people to attendee the meeting.

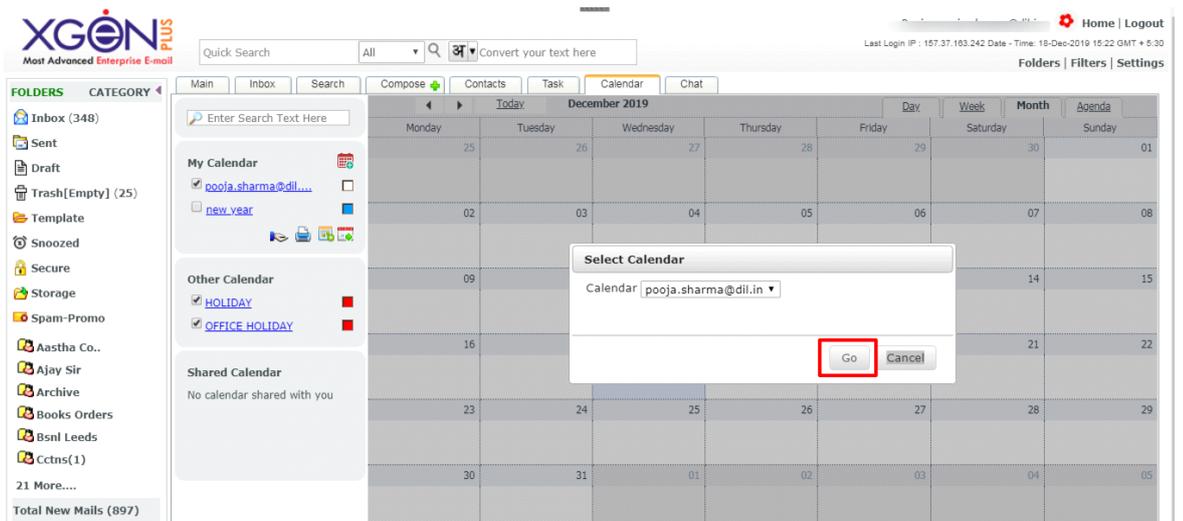
XgenPlus servers as one stop solution for all meeting needs.

Steps to schedule meetings in XgenPlus-

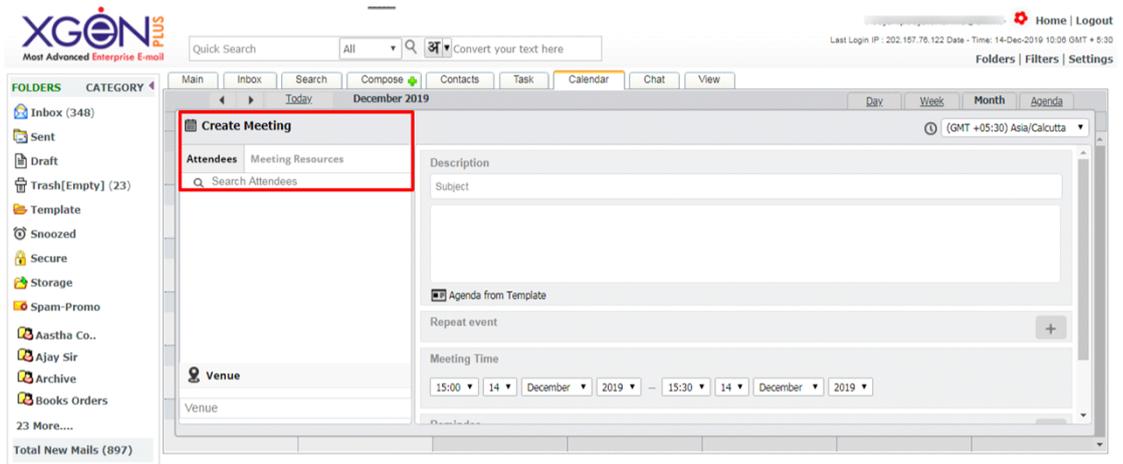
1. Login XgenPlus Email Portal.
2. Select **Calendar** Option from the Top icons.



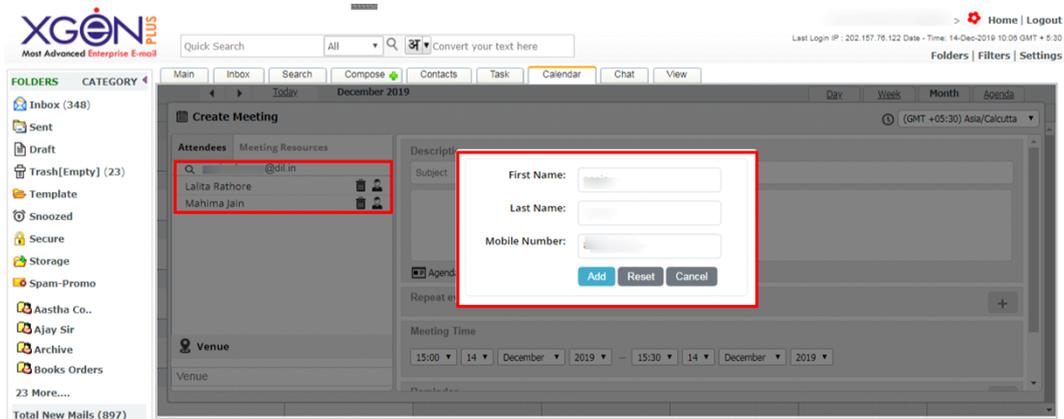
- Select the date for which the meeting needs to schedule.
- Double click on the Date; a screen will open where user can select the Calendar.
- Click on Go option.



3. User will be able see screen where he can create meeting, user can schedule meeting & add attendees for the meeting.

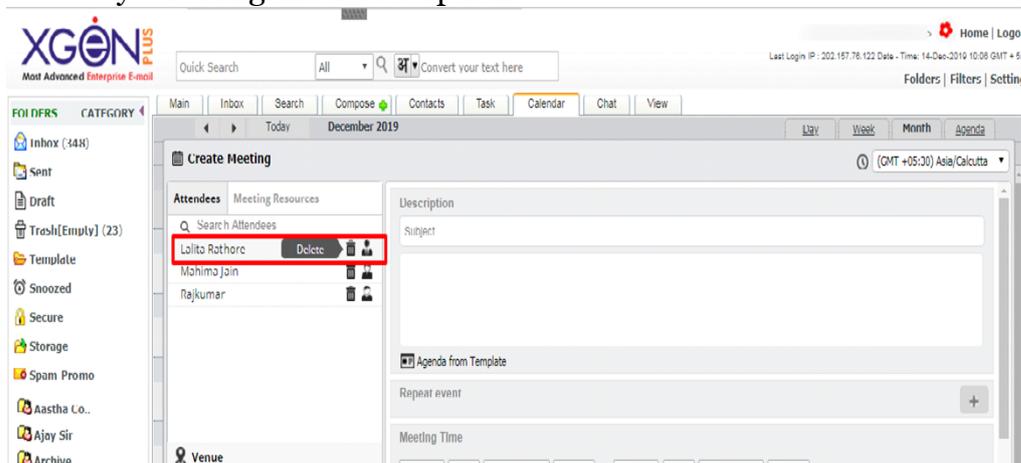


4. Select the attendees, from the contacts or with the Mail id of the attendee in search attendee option.
5. Relevant Email ID's will be displayed as searched and can be added.



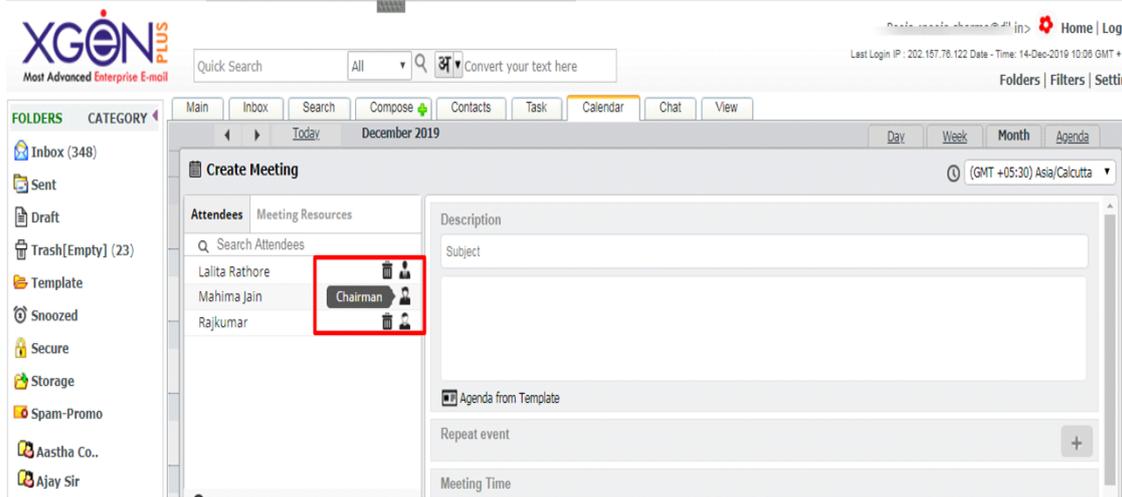
Note: If the person is not in user's contact list, then he has to add the member details first, after that he will be able to add the person for attending meeting.

6. If user wants to delete a person from the list of attendees, he can do it by selecting the delete option.

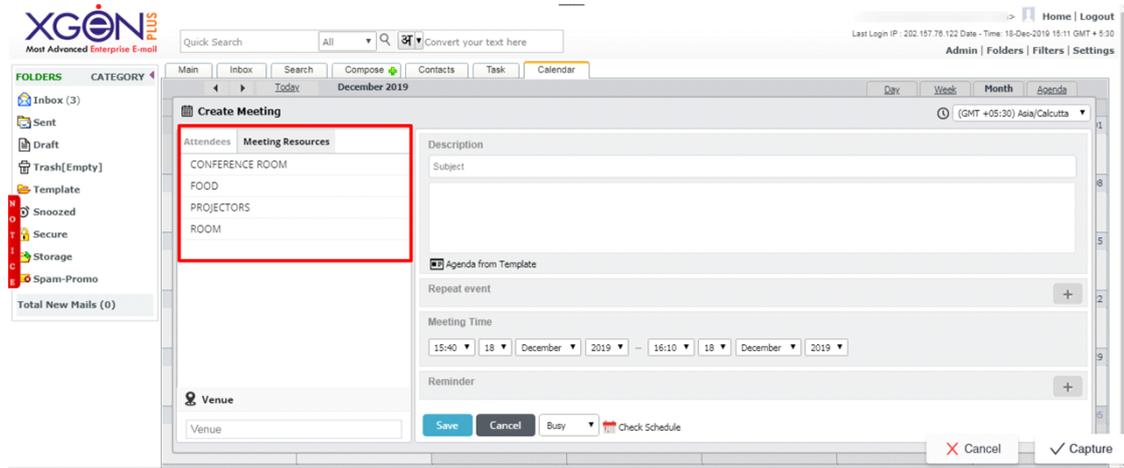


7. User can select **Chairman, Secretary, Member** for the meeting by clicking on profile icon, here the **profile image** will be change as per the designation selected.

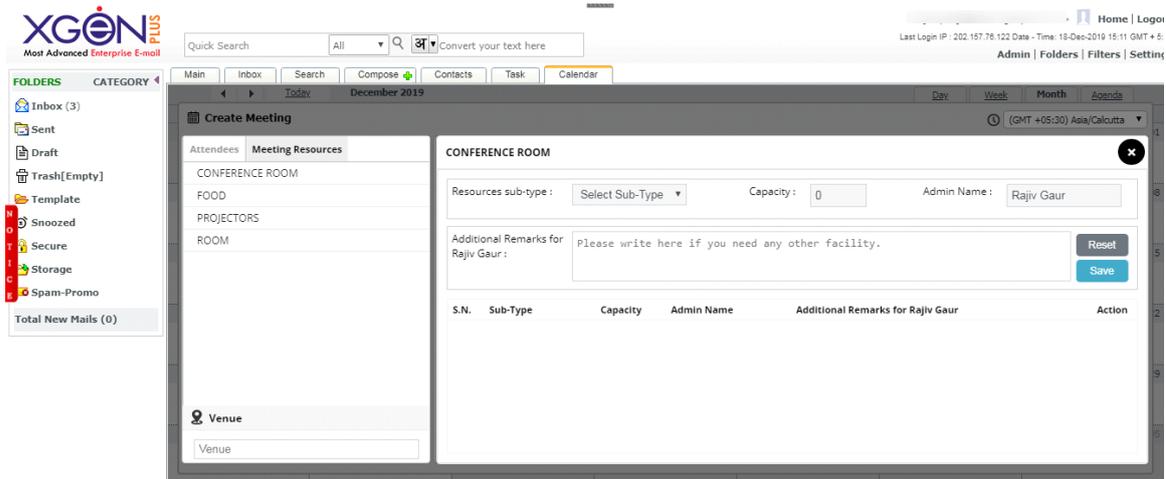
The selected person will be seen in the list.



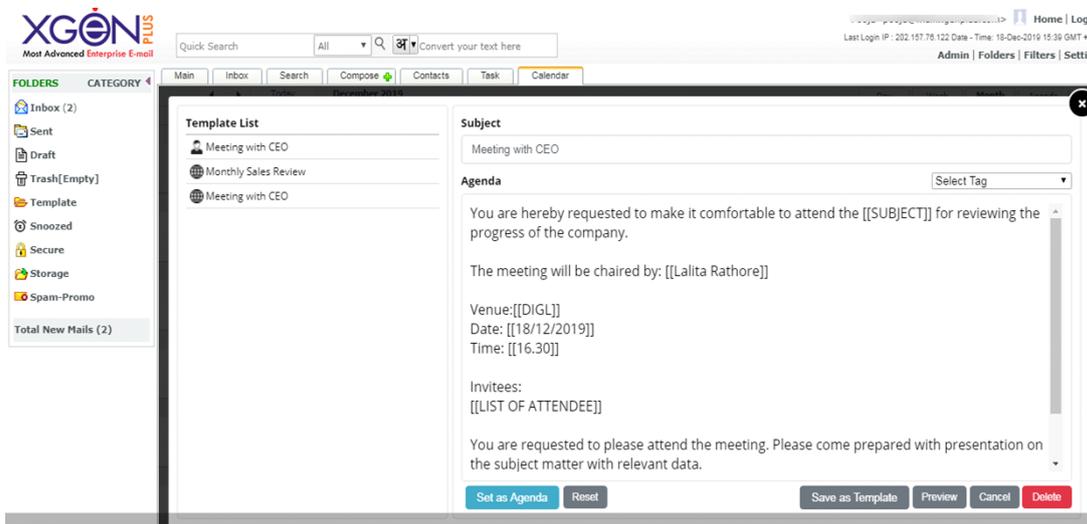
8. User can see the available resources for the meeting in meeting resource option. These options are allowed by the Domain Administrator.



9. Select the Resource you want in the meeting.
10. Add all the relevant details and rite additional remarks if needed.



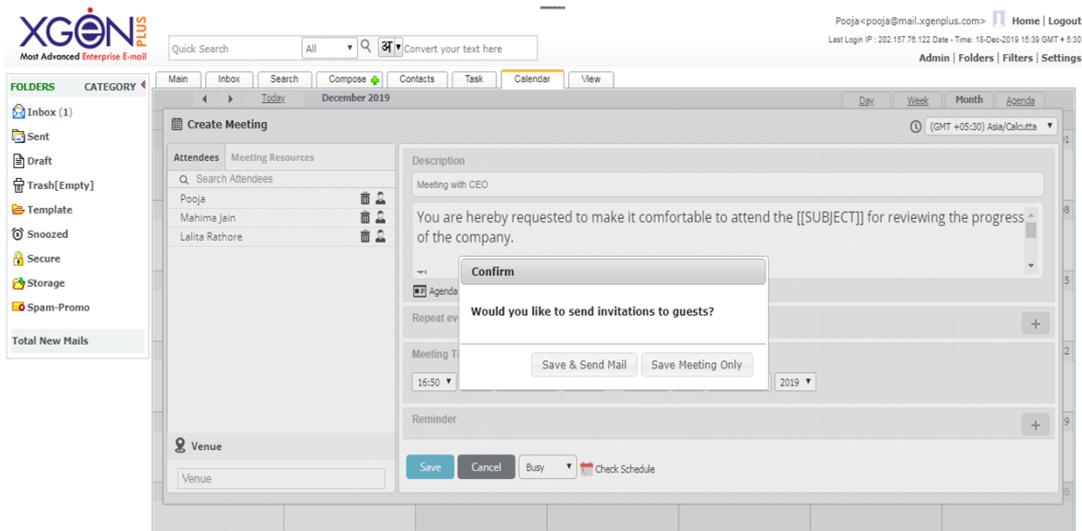
11. Save the Resources selected.
12. Select the Venue of the Meeting.



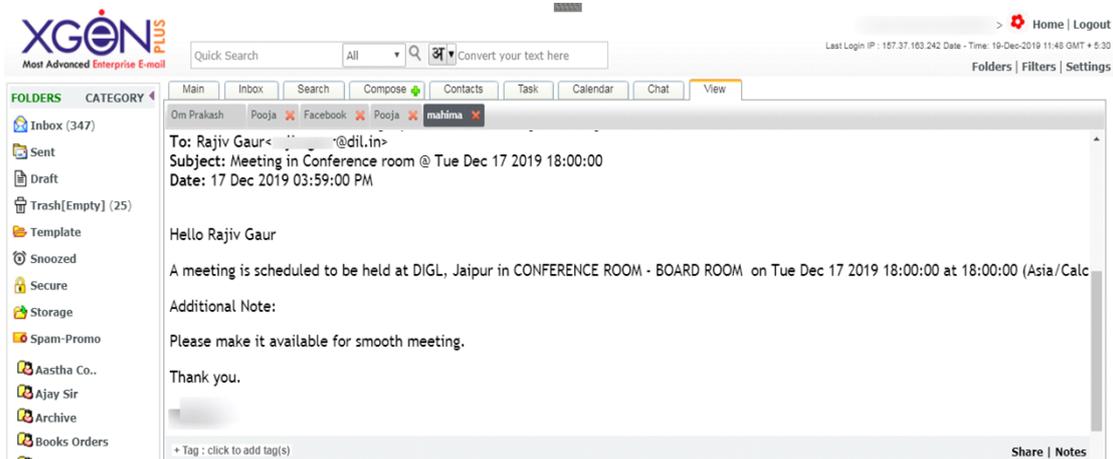
13. Create agenda of the meeting. User can either use the Global Template provided by the domain Administrator or he can create his own personal Template.
14. Select the Tags to fill the information and Save.

Note- User can create his own agenda and save it for later use also. User can add select Tag like- Designation, List of attendees, Meeting Date, Name of creator, Subject and more.

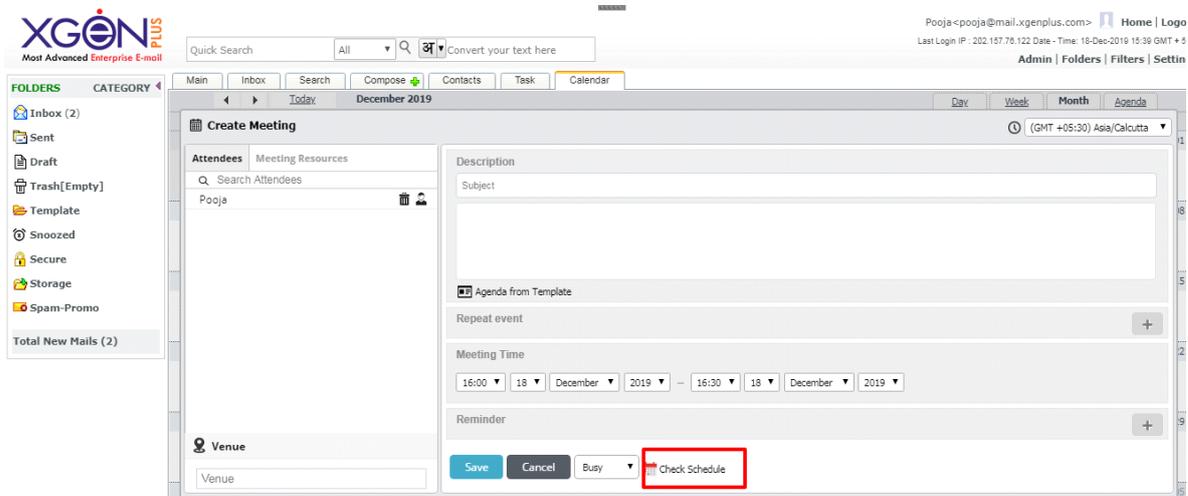
15. The meeting invite will be shared with each participant, they receives emails as per the scheduled meeting.
16. The Resource Admin will also receive a mail to arrange the resources. (The domain Admin selects the resource admin)



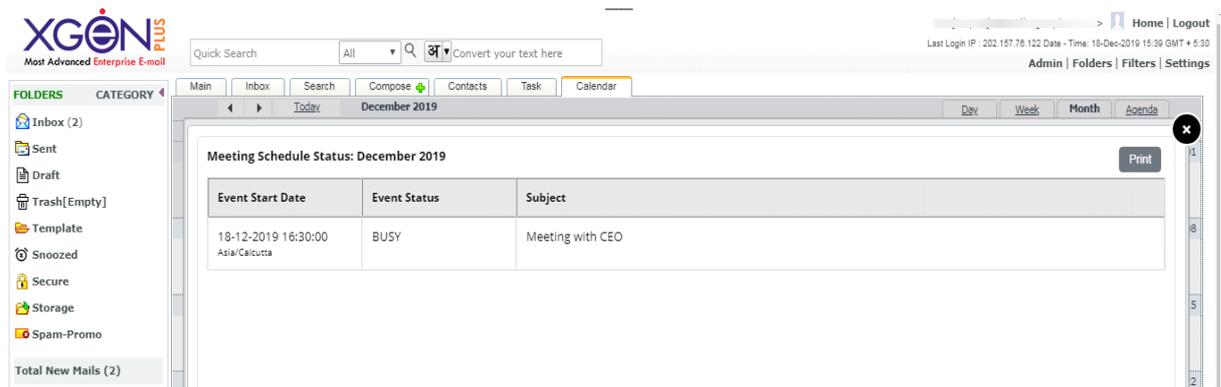
Resource Admin will receive the mail.



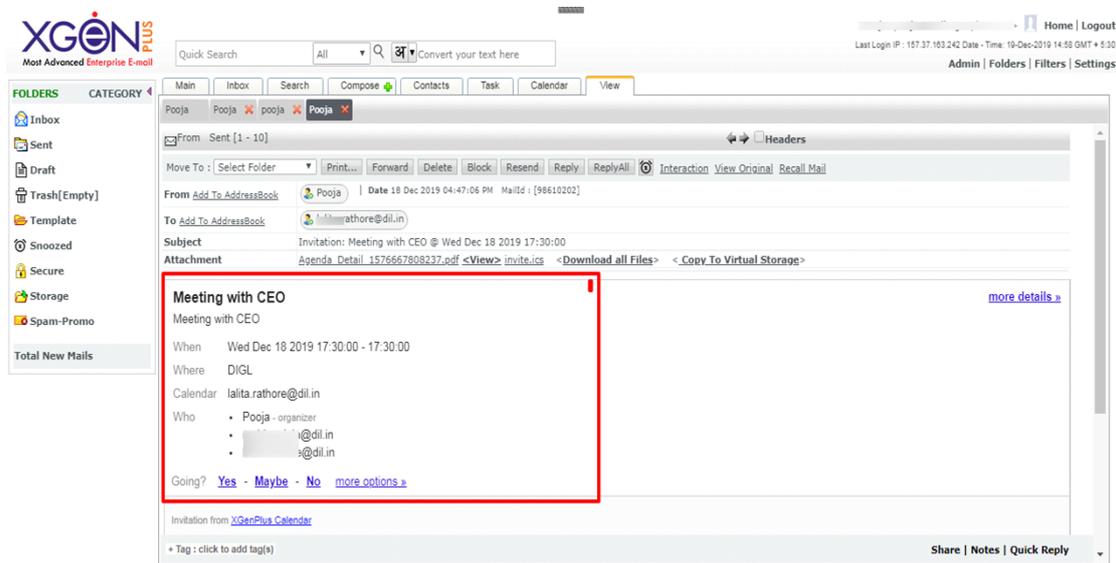
17. User can check the schedule meeting by clicking on Check Schedule icon.



Here user can see the scheduled meeting.

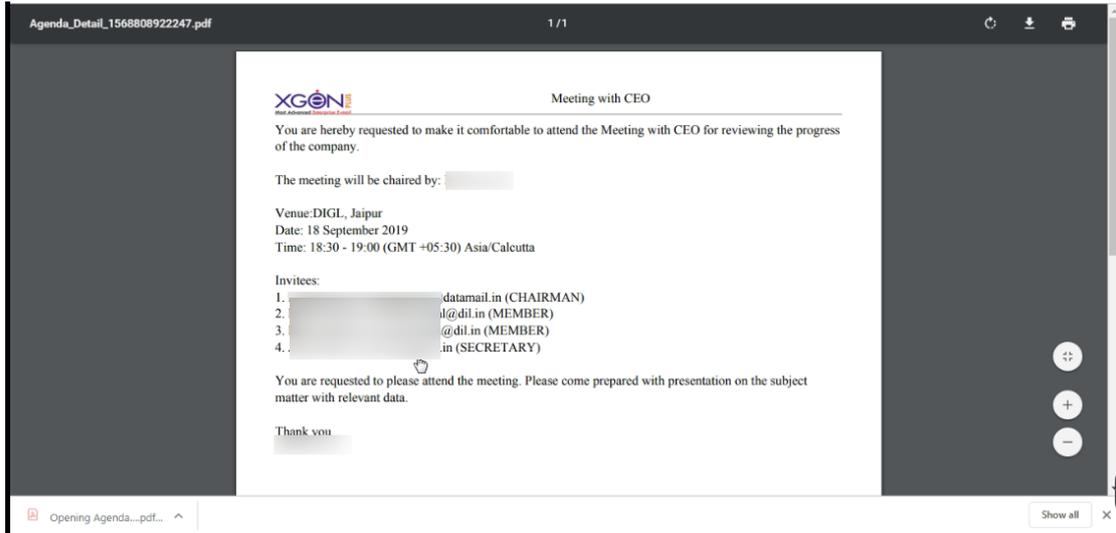


Attendees receive the mail and they can reply about their status if they are attending the meeting **Yes, May be or Not.**



Whatever status selected by the attendees, the confirmation will be automatically sent to the organizer of the meeting.

The attendees receive a PDF which can be use for further reference and an ICS file which can be added to the calendar.



XGON PLUS
Most Advanced Enterprise E-mail

[REDACTED]@dil.in

Your response has been saved
 ✓ Yes, I will join the meeting !

Meeting with CEO

You are hereby requested to make it comfortable to attend the [[Meeting With CEO]] for reviewing the progress of the company.

The meeting will be chaired by: [[Lalita]]

Venue: [[DIGL]]
 Date: [[MEETING DATE 18/12/2019]]
 Time: [[16.30]]

Invitees:
 [[F...@dil.in, r...@dil.in]]

You are requested to please attend the meeting. Please come prepared with presentation on the subject matter with relevant data.

Thank you.
 [[Mahima Jain]]

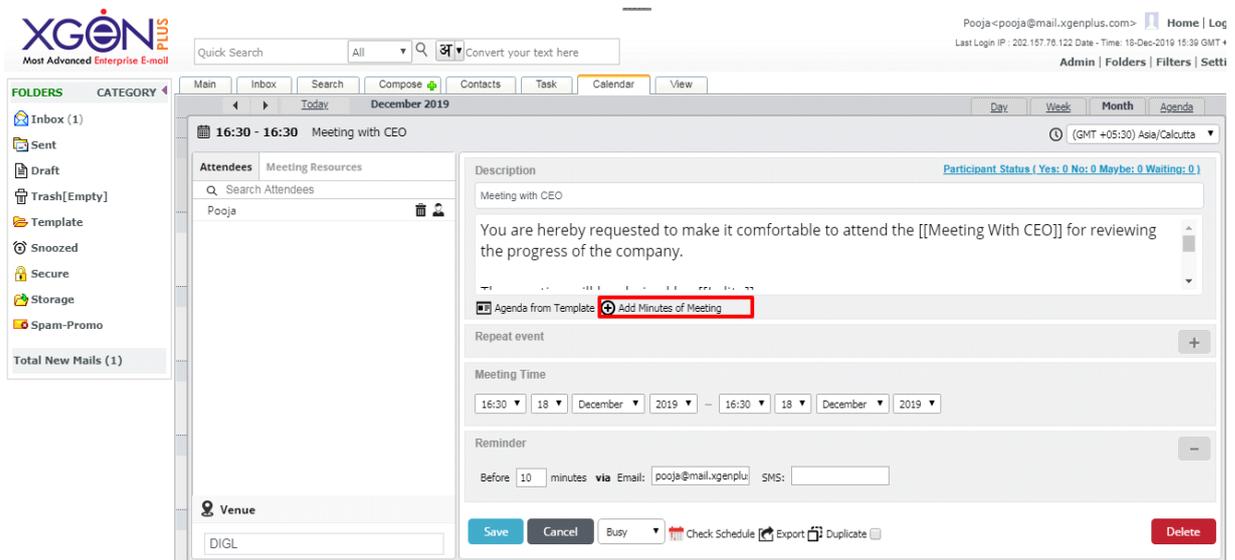
When Fri Dec 18 05:30 PM - 05:30 PM
 Where DIGL
 Calendar [REDACTED]@dil.in
 Who **Yes: 2 No: 0 Maybe: 0 Waiting: 1**

- Pooja - organizer
- ✓ [REDACTED]@dil.in
- ✓ [REDACTED]@dil.in

MOM (Minutes of the meeting)

After Completion of the meeting an option will be visible for MOM (Minutes of the meeting), where user can update details about the discussions in the meeting.

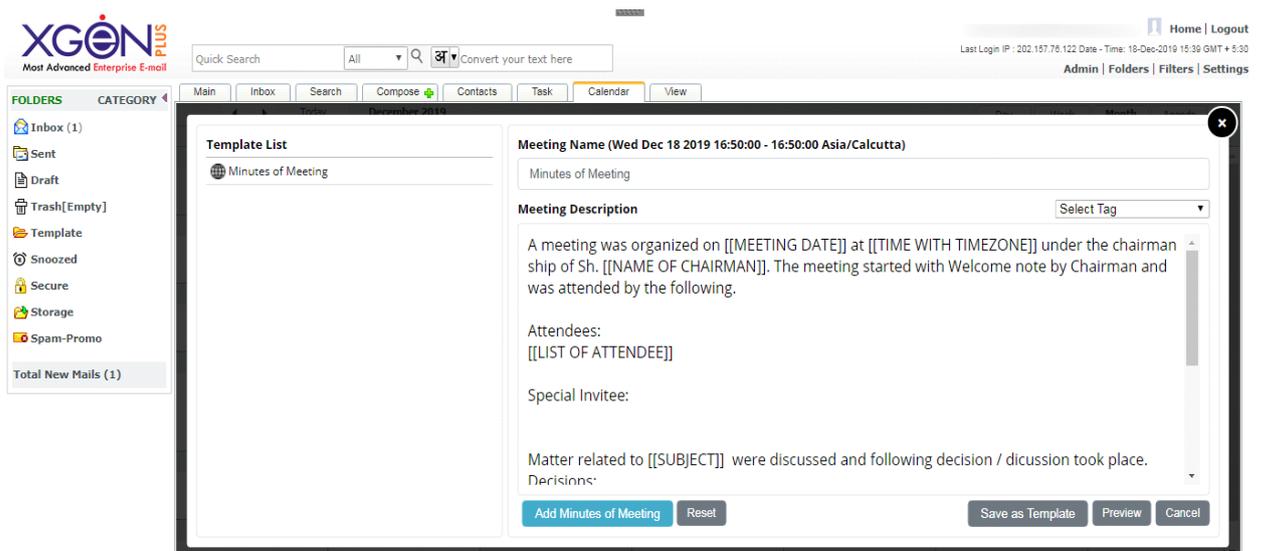
This feature is important as it helps to keep a track of the meeting agenda and its outcome at the same place.



Note- MOM option is only available after completion of the meeting.

User can create minutes of meeting or he can choose from the template for the same.

Select the Minutes of Meeting option, and create the outcome.



User can View and send the MOM to the attendees. User can also send the MOM to special attendees of the meeting.

- FOLDERS** CATEGORY
- Inbox (1)
 - Sent
 - Draft
 - Trash[Empty]
 - Template
 - Snoozed
 - Secure
 - Storage
 - Spam-Promo
- Total New Mails (1)

Minutes of Meeting (Wed Dec 18 2019 16:30:00 - 16:30:00 Asia/Calcutta) Send Mail to Attendee(s) Edit Download Print

Minutes of Meeting

A meeting was organized on 18 December 2019 at 16:30 - 16:30 (GMT +05:30) Asia/Calcutta under the chairman ship of Sh. . The meeting started with Welcome note by Chairman and was attended by the following.

Attendees:
1. Pooja - pooja@mail.xgenplus.com (MEMBER)

Special Invitee:

Matter related to Meeting with CEO were discussed and following decision / discussion took place.
Decisions:
1.
2.
3.

The minutes of meeting are issued for necessary information and action.

11.EML File Extension

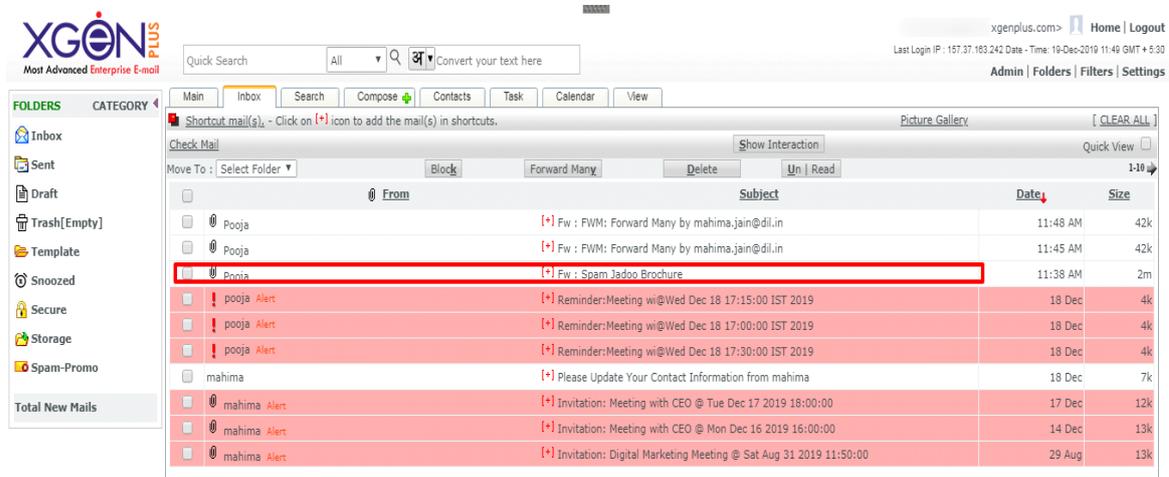
EML is a file extension for an email message saved to a file in the Internet Message Format protocol for electronic mail messages.

This feature allows sharing the entire mail as an attachment to which the receiver can reply in proper format.

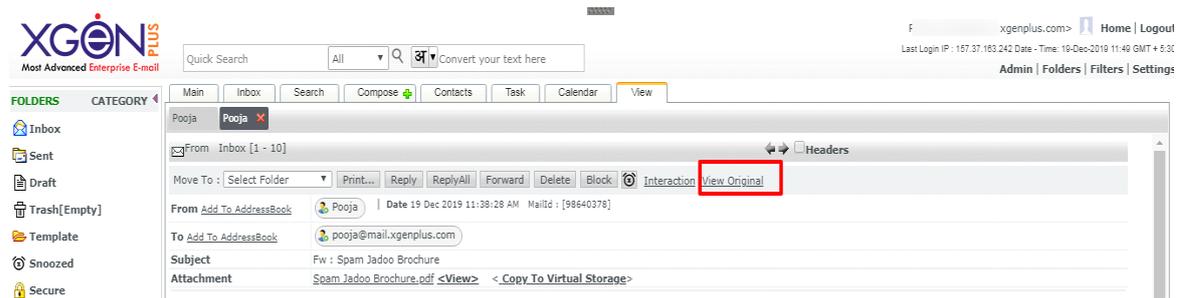
How to Save & Send EML file extension

Login XgenPlus inbox and select the mail which user wants to send as an eml file extension. User can convert the attachment in .EML file format by using the following steps:

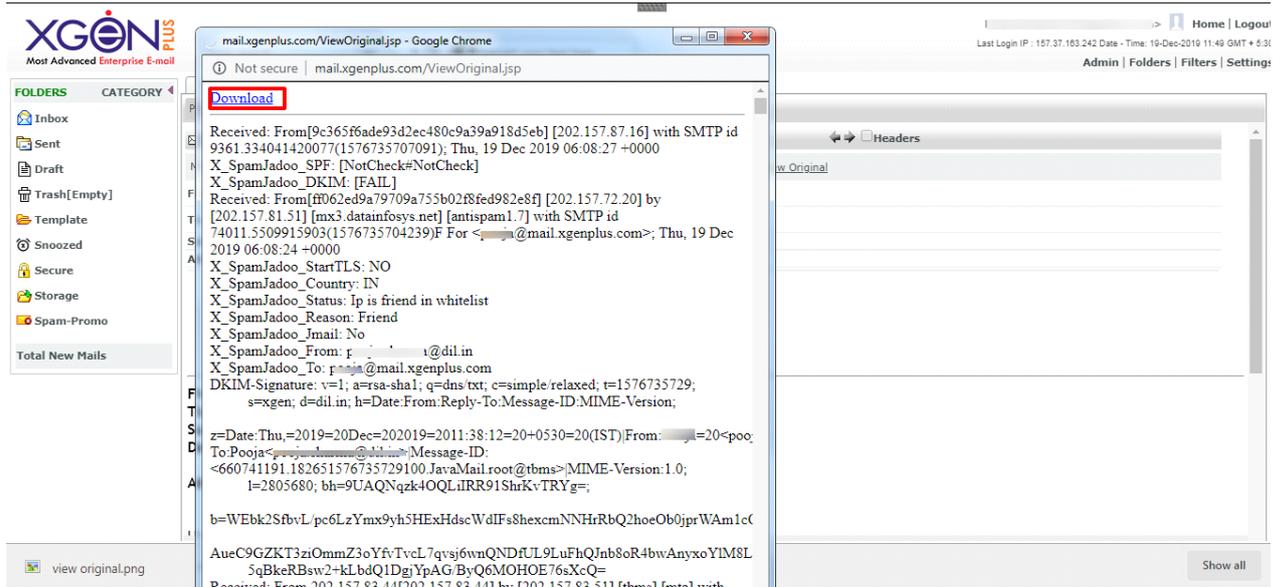
- Go to inbox
- Select the desired email which you want to convert



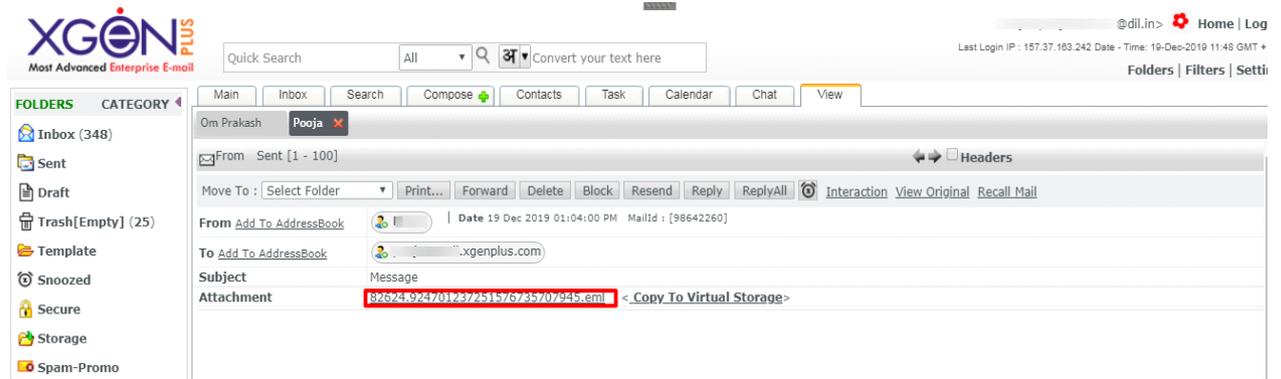
- Here you can see the subject as Spamjadoo Brochure, to convert this email in .Eml extension.
- Select **View Original** Option from the right corner of the Headers.



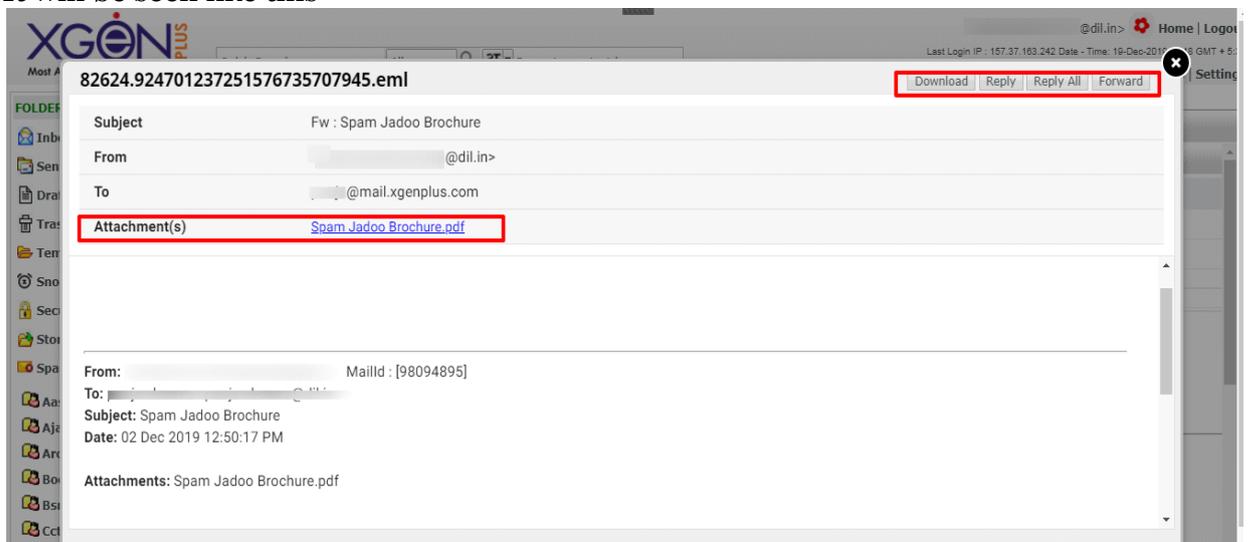
- Click on Download option.



- The file will be automatically downloaded as an . EML file.
- Now you can save it on your desktop or any other folder in which you want to save.
- Select the file you want to send as an .EML format and compose a email.
- Attach the eml file and send the mail.



It will be seen like this-



- You can see the original message here, as well as you can Download, Reply, & Forward email or attachment directly from here.
- The mail will be sent as a normal composed mail.

12. Lead Management

Effective Solution for Sales Activities

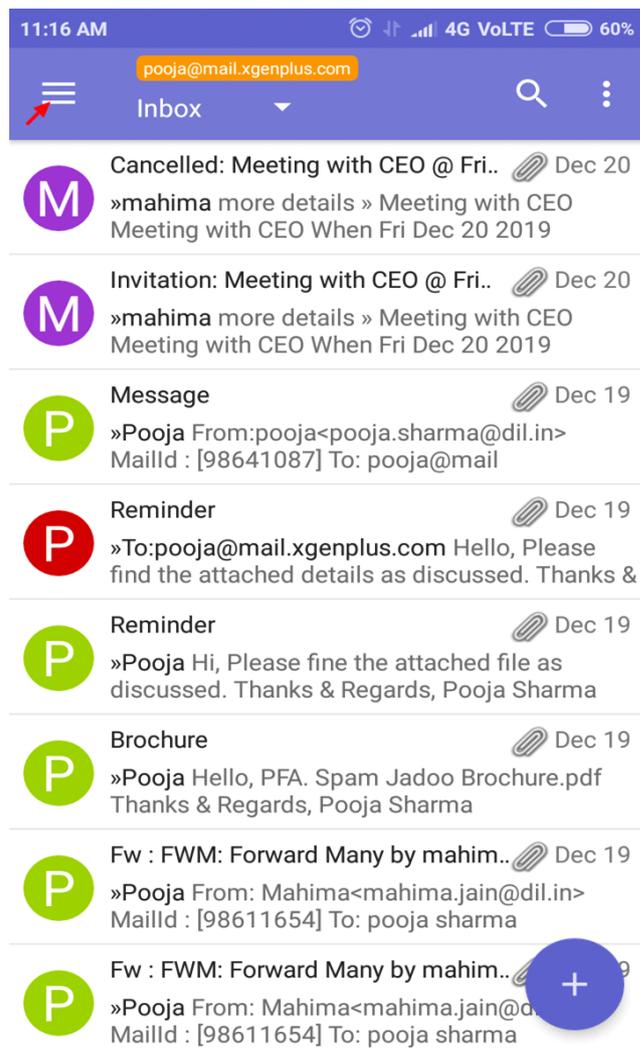
Nowadays, it's important for every organization to generate leads and offer best services to its customers. Xgen Lead Management is specially designed for the Sales Team that helps team in Adding, tracking and nurturing sales leads. In this activity the team lead also gets the opportunity to see the lead status of his team member so that he can intervene as and when required.

Lead Management is a complete solution for any sales activities.

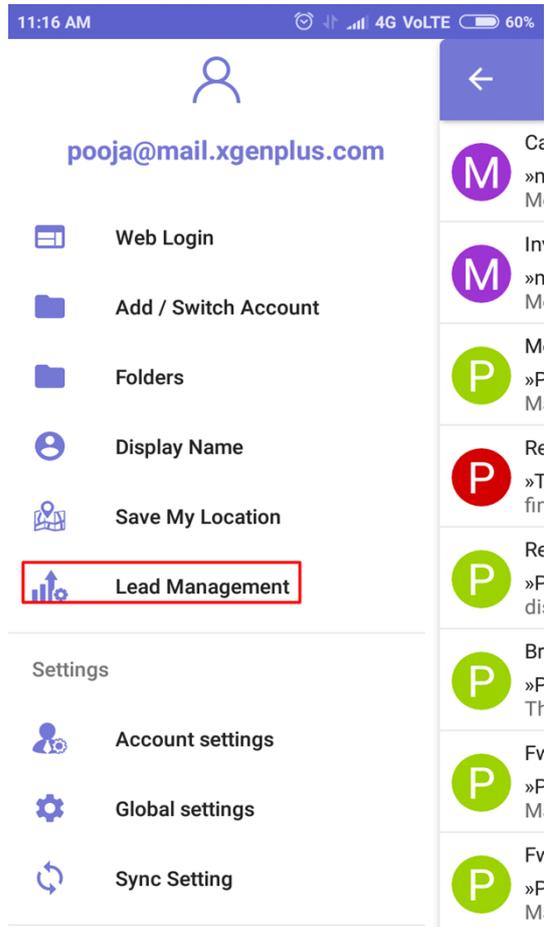
Note: To use lead management in Xgen mail app it must be enabled by the Domain Administrator, then only the user will be able to take this facility.

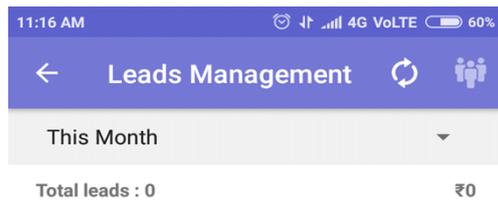
Steps to access Lead Management

- Login Xgen Mail Mobile App
- Go to Menu Option

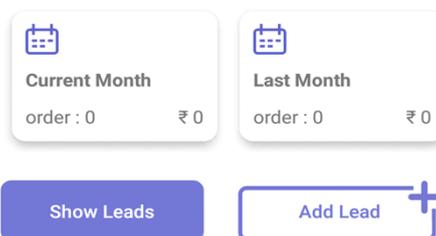


- Click on the Lead Management option to land on Lead Management Dashboard.





Orders



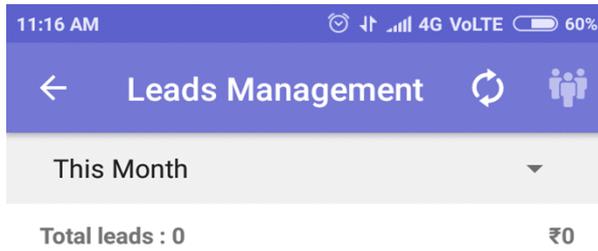
This is the dashboard for Lead Management from where a user can keep track of the leads generated. This page will further help him to view his progress on a single page.

The options available are:

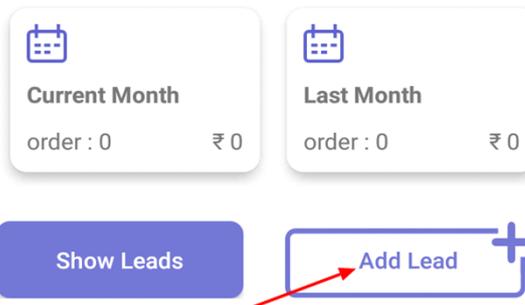
- Data Synchronization- Data Sync option allows user to synchronize data or file for any update.
- Team Lead- Team lead option will allow the leader to view his team's data if enabled by admin.
- Show Leads- Here user can see all leads generated in detail.
- Add Lead- After choosing this option user can add a fresh lead.

Add Lead

- Add Lead from “Add Lead” button.



Orders



-
-
-
-

- Fill in the fields for adding the lead. Fill all the mandatory details about the lead. (all fields are mandatory mark as *)

12:06 PM 4G VoLTE 55%

← Add Leads

Select service name *

Company Name *

Contact person *

Email *

Mobile *

City *

Attach

Select service type *

Add Lead

- ✓ Select Service Name from the dropdown. This includes all the services offered within an organization.

12:14 PM 4G VoLTE 55%

← Add Leads

Select service name *

BROADBAND *

GOVERNMENT TENDER *

HOSTED EMAIL

INTERNET BANDWIDTH *

MOBILE APP DEVELOPMENT *

OTHERS *

SOFTWARE DEVELOPMENT

SPAMJADOO SOFTWARE *

TBMS SOFTWARE *

WEB DEVELOPMENT

For Eg. Software Company could offer services for Mobile App Development, Software Development, Web Development etc. so the sales people will pitch for these services and generate lead for them, so the organization will provide these services in the dropdown for the user to select.

These Services are added by the Server Admin.

- ✓ Company name will be the Company to which the user is pitching.
- ✓ Contact person – Write the Contact person name or select from the phone directory if details are added. (In case id contact is selected form phonebook, mobile number will be automatically added in the mobile no field)
- ✓ Email should be added of the prospect.
- ✓ Mobile No of the prospect.
- ✓ City of the prospect.
- ✓ Attach any document, files if available for future reference.
- ✓ Select Service Type from the drop. This will include the type of lead whether hot cold etc.

These Services are added by the Server Admin.

The screenshot shows a mobile application interface for adding leads. At the top, the status bar displays the time as 12:23 PM, signal strength, 4G VoLTE, and a 54% battery level. Below this is a purple header with a back arrow and the text 'Add Leads'. The form consists of several input fields: 'Contact person' (with a phone icon), 'Email', 'Mobile', 'City', 'Attach' (with an upload icon), and 'Select service type'. The 'Select service type' dropdown is open, showing three options: 'COLD (With in 3 to 6 month)', 'HOT (With in 1 month)', and 'WARM (With in 1 to 3 month)'. At the bottom of the form is a large blue button labeled 'Add Lead'.

- ✓ Monetary amount of the lead.
 - ✓ Add notes if any
- After filling all these leads hit add button to add lead.

- User can view all the added leads from Show Leads option or by clicking on the lead details.
- Leads details will appear. Now User can call, Email, whatsapp the concern person directly from here.

← **Leads Management** ↻ 👤

This Month ▾

Total leads : 4 ₹3,06,000

WARM
 Leads : 3 ₹3,00,000

COLD
 Leads : 1 ₹6,000

Orders

Current Month

order : 0 ₹ 0

Last Month

order : 0 ₹ 0

Qu:

ord

Show Leads

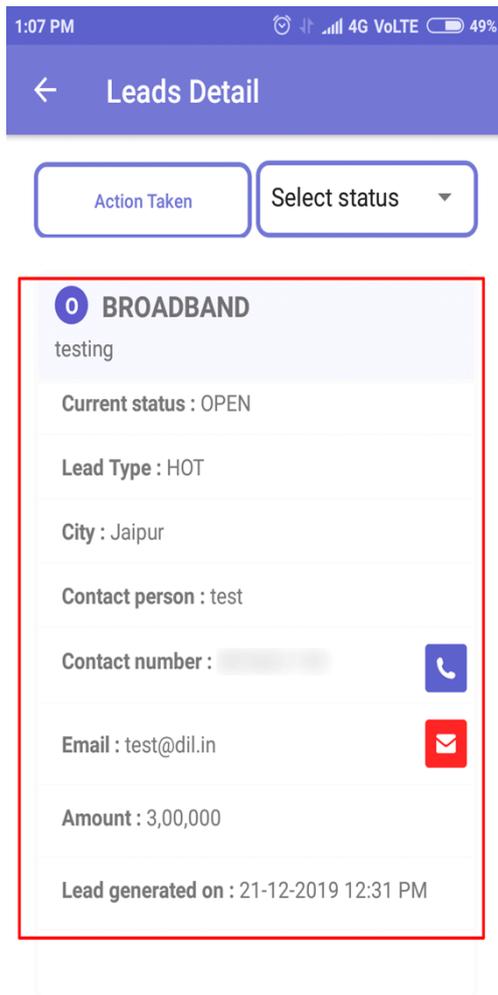
Add Lead +

testing
test
BROADBAND
3,00,000 2 minutes ago
Added by :
pooja@mail.xgenplus.com

tesying
msd
GOVERNMENT TENDER
30,00,000 47 minutes ago
Added by :
pooja@mail.xgenplus.com

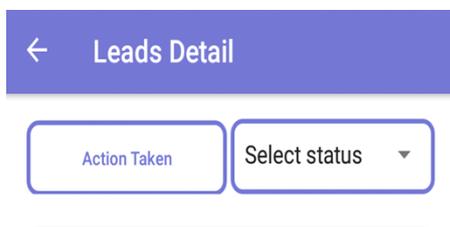
data Xgen technology
test
XGEN IM

Click on the lead to view lead in detail. Lead details are non editable.

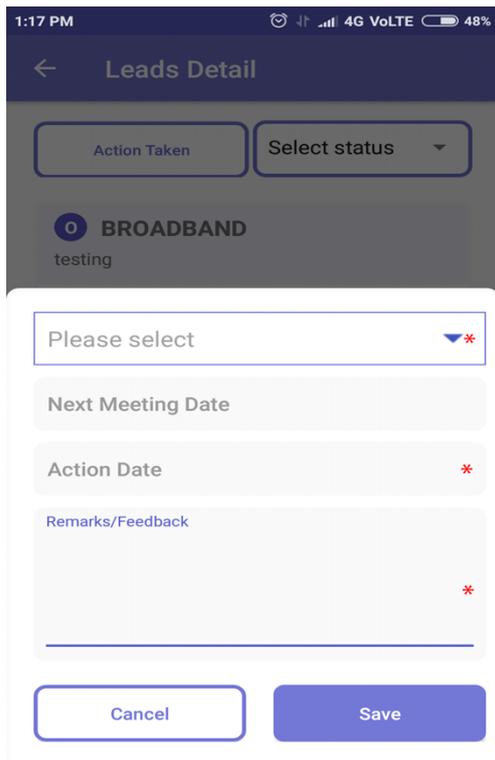


User can perform two actions:

- Action Taken
- Status.

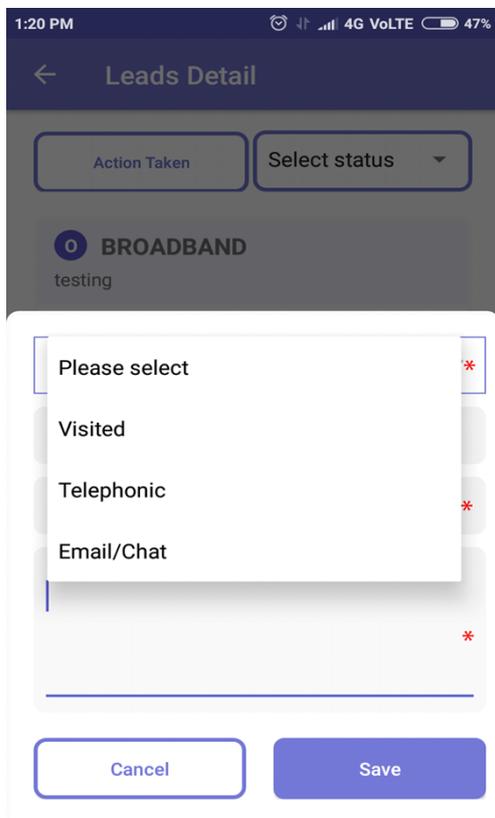


- Action Taken- This option allows user to view the lead actions taken and required to be taken in future.

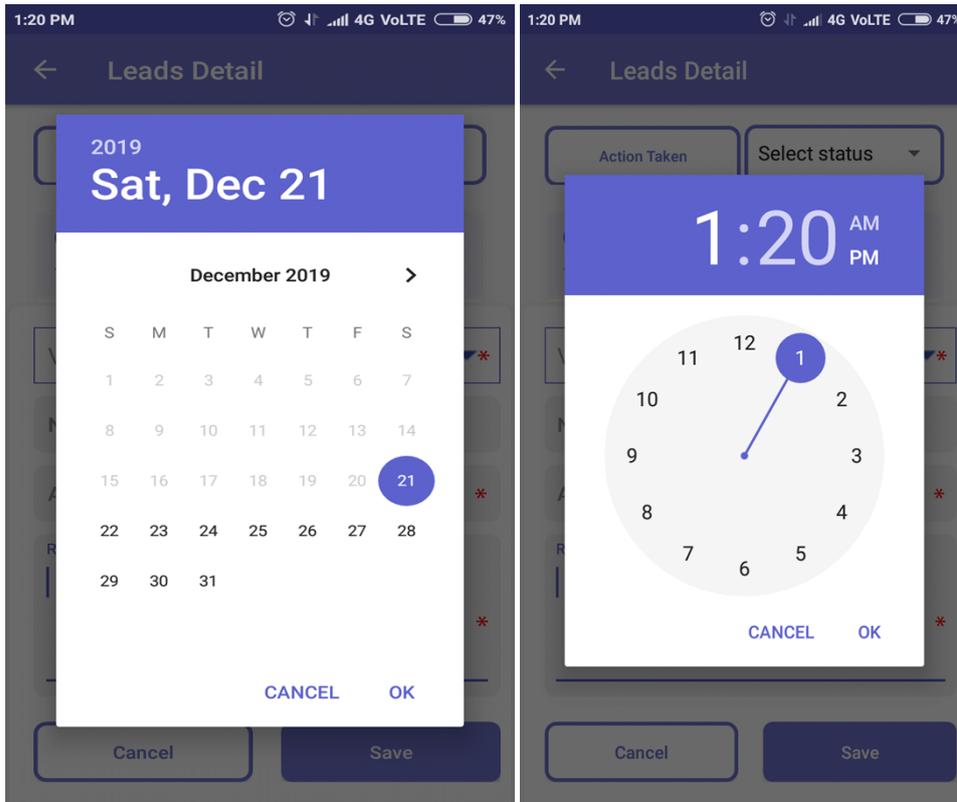


This includes–

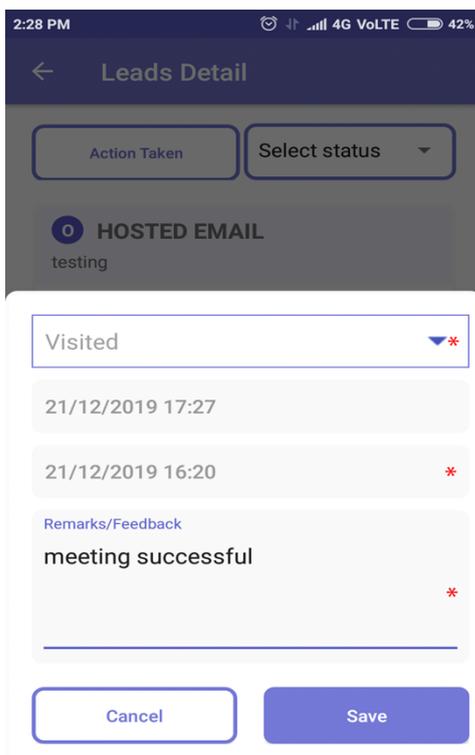
- Visited
- Telephonic
- Email/Chat



Action Date- user can select the date & Time of visit and can plan for the next visit as well.



Remarks/ Feedback- User can enter the remarks/ feedback for the lead if required.

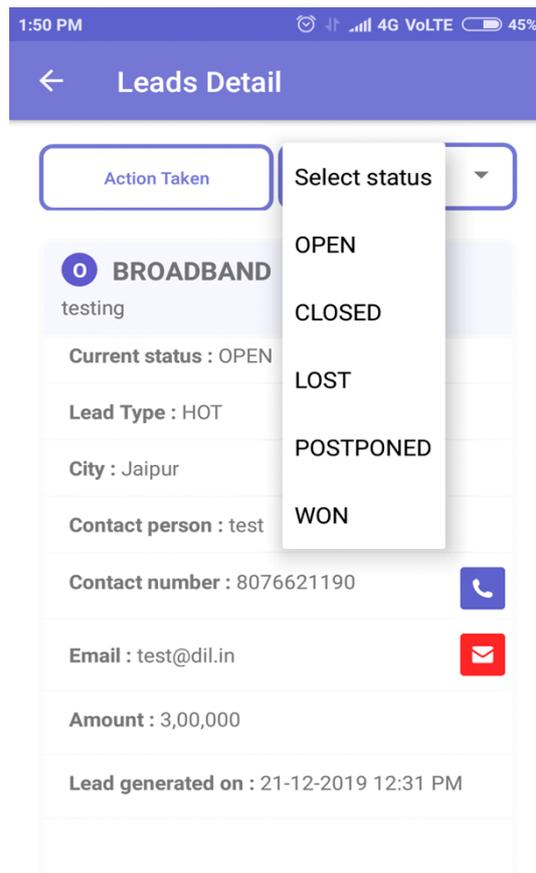


Click on save icon.
Now the Action on the lead will be saved.

•Select status-

User can select the status of the Lead if the Lead is-

- Open
- Closed
- Lost
- Postponed
- Won.



User can update the status by selecting the desired option.

For Each Status user will receive a status box where he/she can update the remarks along with the status. This will further enable to review the lead with status and description of each stage of lead.

2:39 PM 4G VoLTE 41%

← Leads Detail

Action Taken WON

HOSTED EMAIL
testing

Reason
successful *

Remarks
successfully completed *

21/12/2019 *

Cancel Save

2:39 PM 4G VoLTE 41%

← Leads Detail

Action Taken WON

HOSTED EMAIL
testing

Reason *

Remarks *

Next Follow Up Date *

Cancel Save

Click on Save to view the Status of all leads together.

2:49 PM 4G VoLTE 40%

Leads Management

This Month

Total leads : 4 ₹35,52,000

- HOT** Leads : 2 ₹3,02,000
- COLD** Leads : 1 ₹30,00,000
- WARM** Leads : 1 ₹2,50,000

Orders

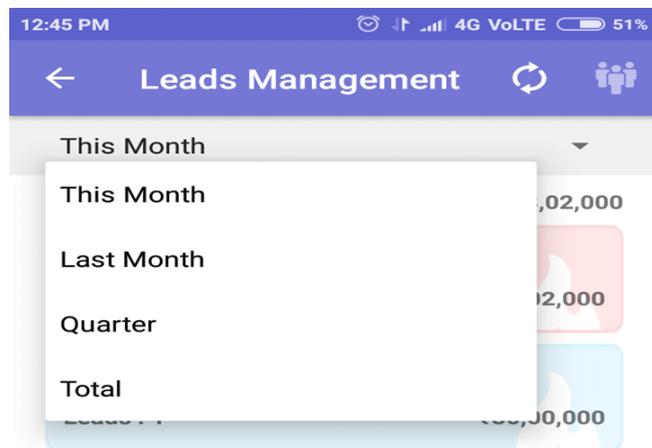
Current Month order : 1 ₹ 2,50,000	Last Month order : 0
--	--------------------------------

Show Leads Add Lead

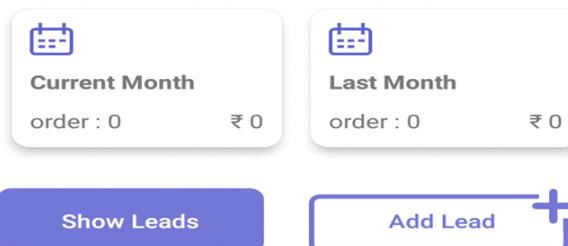
View Leads

User can see his/ her Lead Status Monthly, Quarterly, & Total.

On the Dashboard click the dropdown.



Orders



Filter the leads based on:

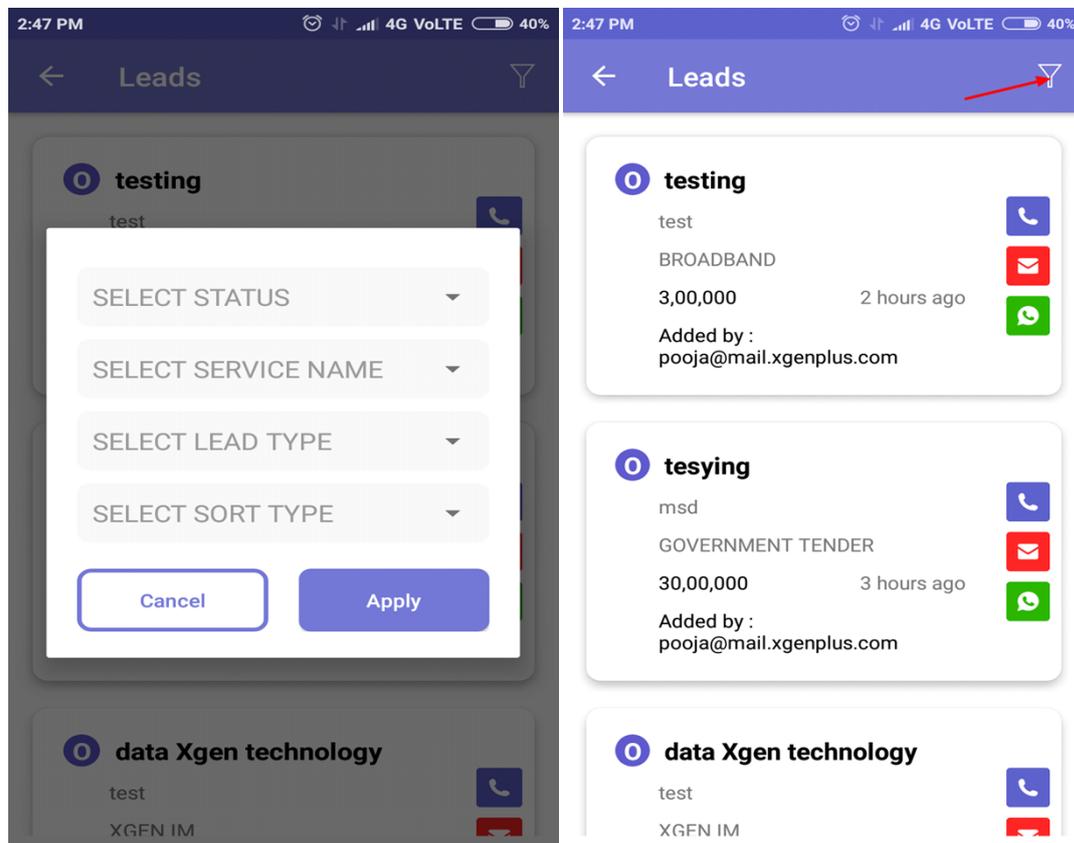
- This month leads
- Last Month Leads
- Quarter
- Total Leads

Filter Lead

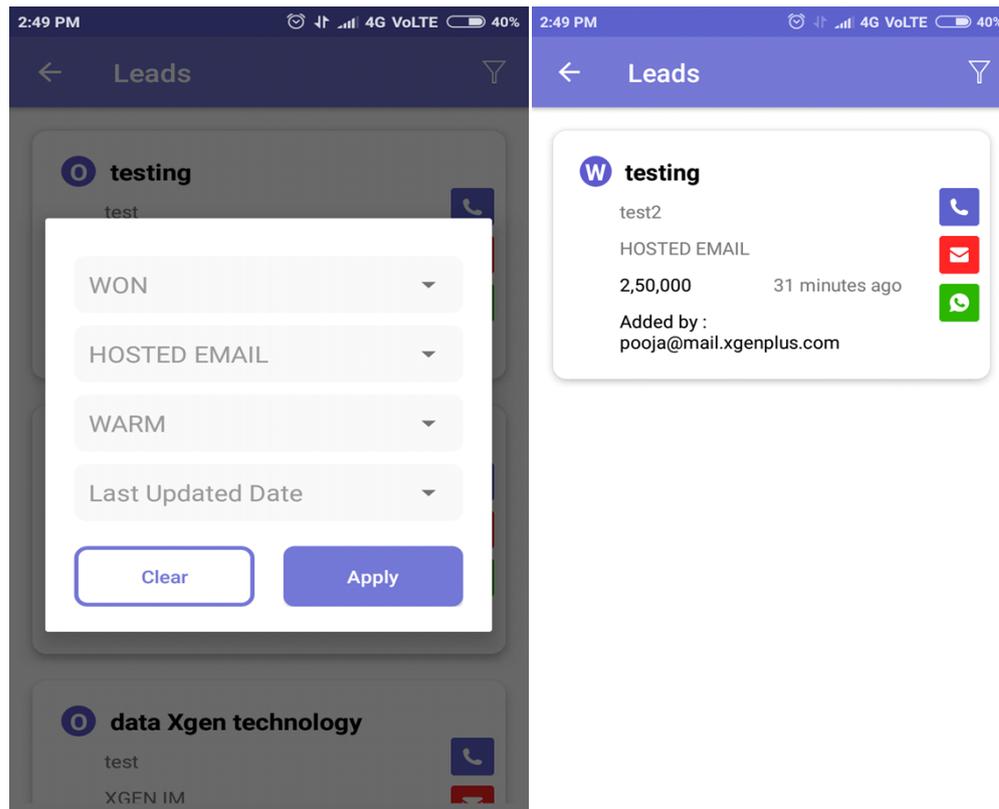
Lead Filter allows user to Search Leads. From this option user can Search For the specific lead, as sales persons have many leads so it becomes difficult to find previous leads & their status quickly. So this filter allows user to Search for the lead by sorting easily. User can search for a specific lead and the lead opens.

Filter lead can be done as -

- ✓ Select Status- user can select status whether the lead is Open, Closed, Lost, Postponed or Won.
- ✓ Select Service Name- Which kind of service offered for the lead.
- ✓ Select Lead Type- To search for a lead user have to enter lead type Cold, Hot, or Warm
- ✓ Select Sort Type- User can sort leads by last updated date, Amount or Company Name.



Fill all or relevant fields and hit Apply.



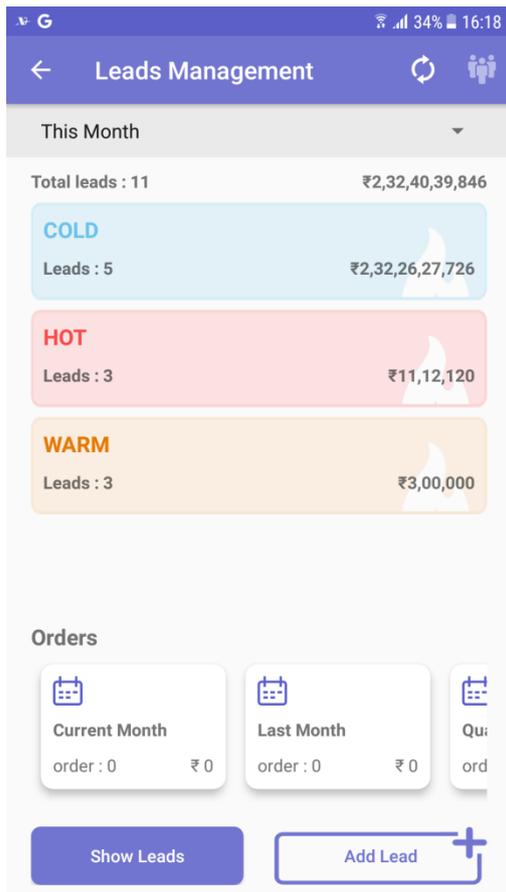
As per above screenshot, user can see all the details through Lead Filter.

The Sales Manager can view the lead status of his team. Simply click on the people icon to view your team progress. To view specific progress, filter the criteria.

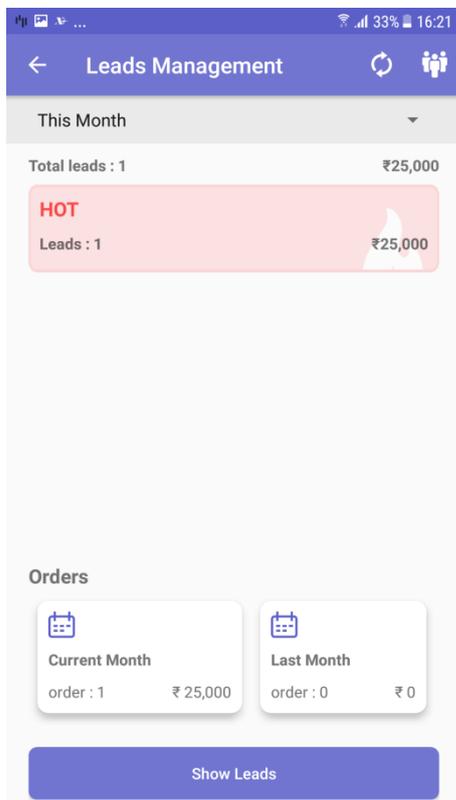
For Eg.;

Mahima is the Team Leader and has John, Vikram under her team who reports to Mahima. So Mahima has the authority to see their progress.

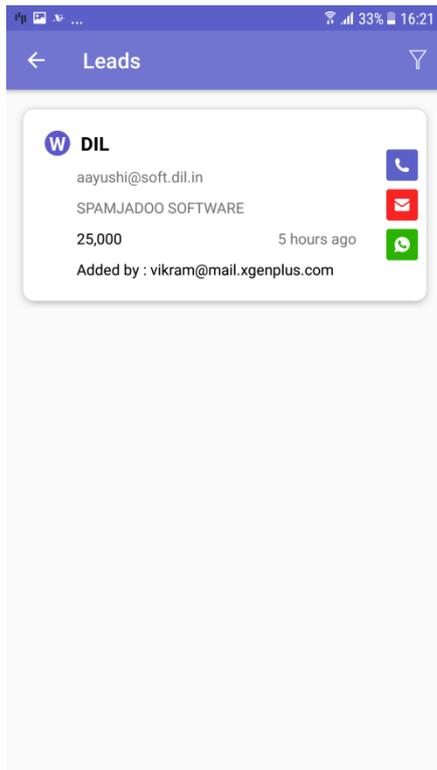
Mahima's dashboard looks like:



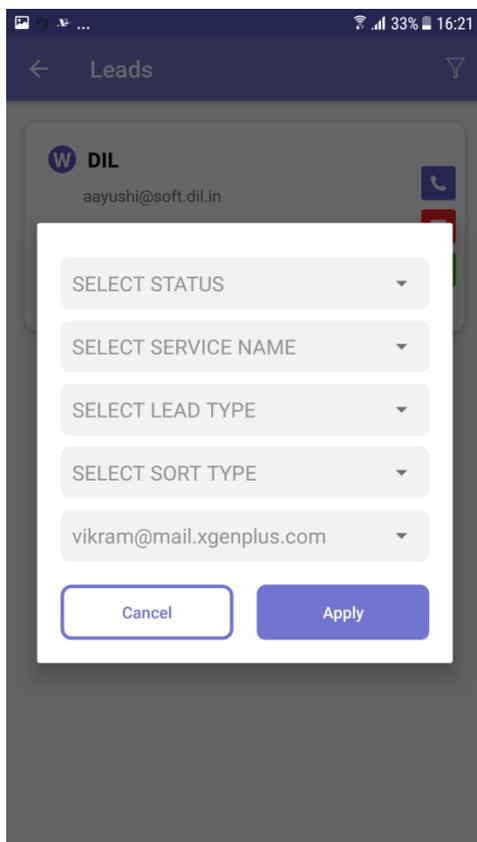
Click on the people button on tope left corner to view team leads. On click teams lead will look like:



Click on the lead to view details.



Under added by heading user can view which team member has added the lead or to figure out who has created this lead use the filter feature.



13.Xgen IM

XgenPlus is an Encrypted Instant Messaging App for organizations available on play store and app store. Xgen IM allows a user to exchange messages (including images, videos, voice messages, files, live location) within the private groups, public groups or an individual chat. It also allows the user to send instant video recording and image capture within the chat. The app is designed in such a way that it provides the ease of chatting with utmost reliability and security.

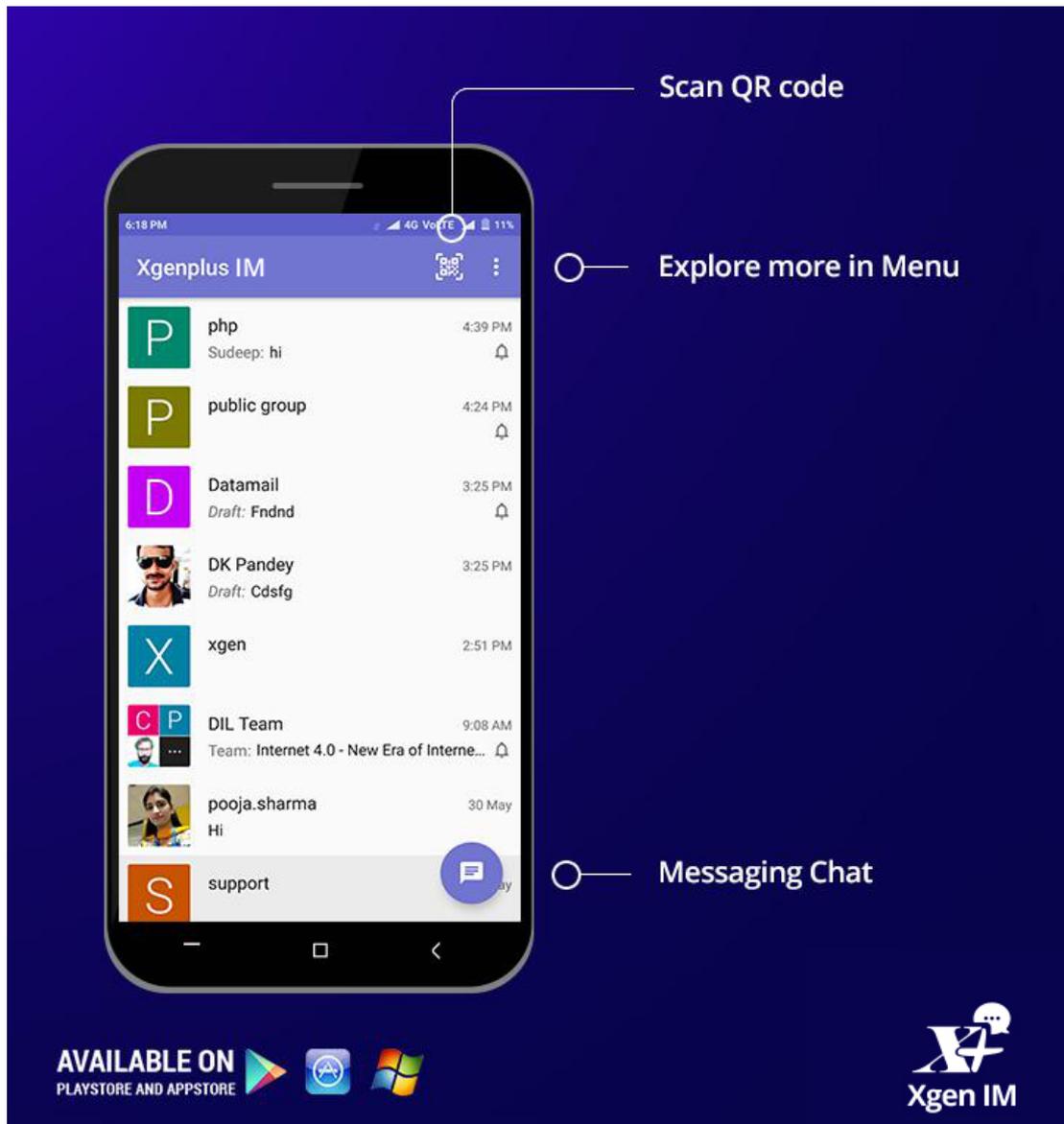
Why A Business Needs Xgenplus Instant Messaging Chat

In today's collaborative world where everything is shifting towards making interaction fast, secure and reliable. Instant messaging platform has found a new space in the business. Though a secure email can be a choice to convey the message for instance but for deep, longer and continuous interaction a business needs an end to end encrypted instant real-time messenger that allows a user to send/receive a message in no time and enables interaction within the business or with customers flawlessly. Xgen IM provides end to end 256-bit encryption that protects your business conversation with all kinds of attacks and hacks.

Most of the free instant messaging platforms provide end to end encrypted chat facility but encryption keys are stored in their own servers. So, anyone having access to the server can easily peep into your account and would be able to access information. Whereas, Xgen IM messenger gives flexibility to the business to have control of their database on their servers that eliminates the risk of data privacy hack.

Steps

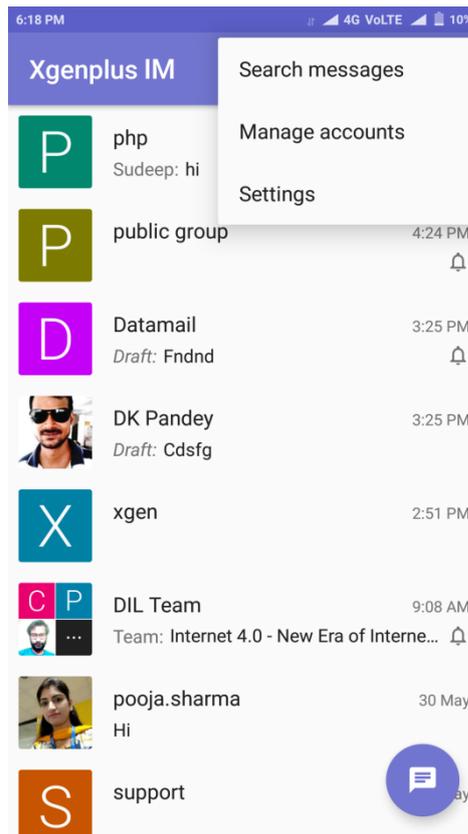
To download the app go to the Google playstore /Appstore and search for Xgen IM. Click on the open, you will be directed to the login page where you need to enter your organization email ID and password. Once login into your account you will see the Message dashboard.



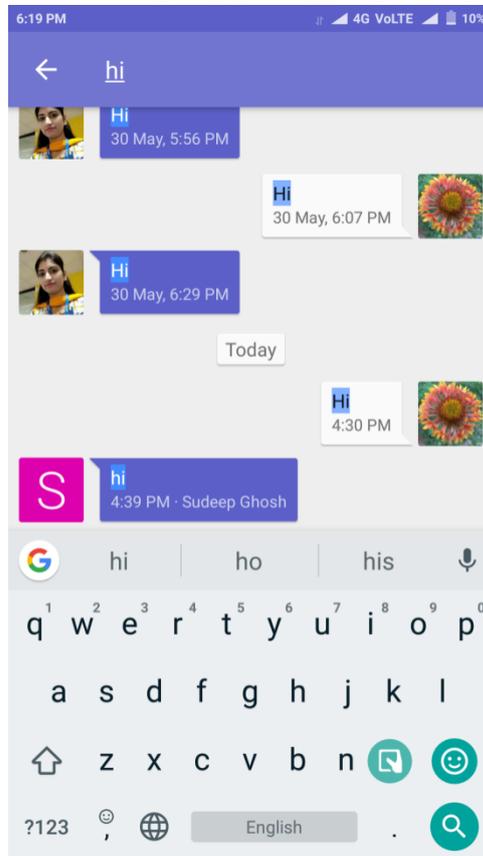
Message Dashboard

User will have three action icons on the top of the screen as-

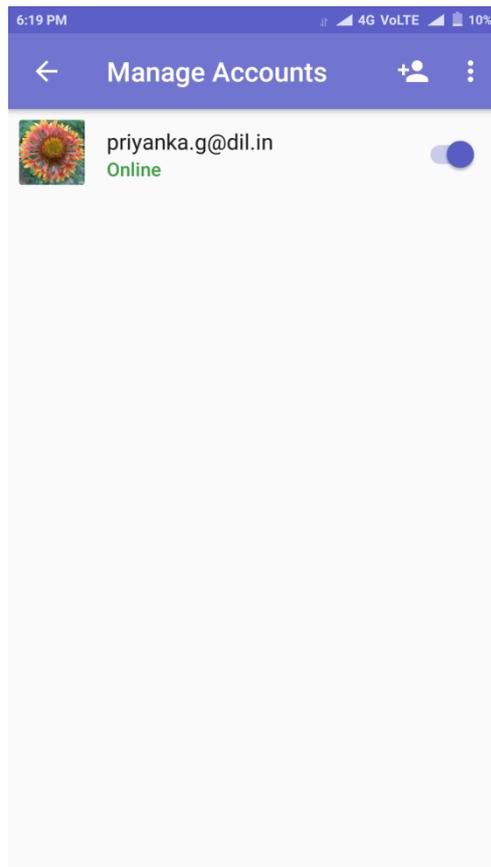
1. Scan QR code - User can add a contact with just scanning the barcode. A user can check its own QR code at **Menu>>Manage Accounts >> Tap On Account >> Share >> Show 2D Barcode**
2. Menu – Menu will have three options in list
 - Search Message
 - Manage Accounts
 - Settings



- **Search Message:** - Find out a specific message from the huge log of a message by just typing a single keyword.

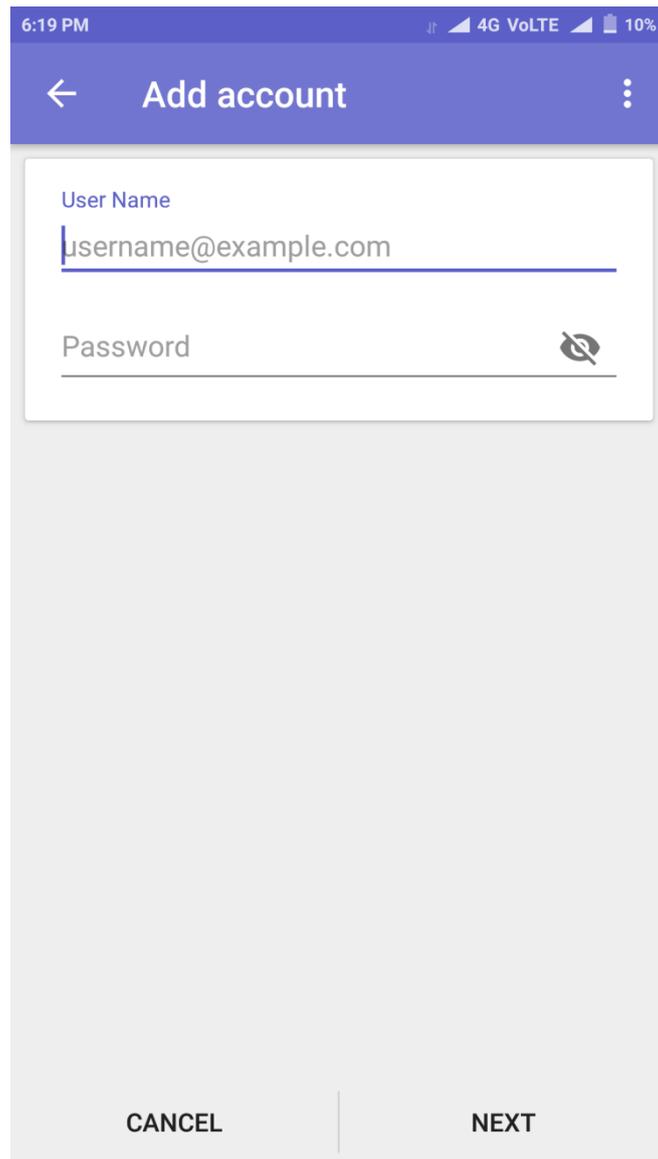


- Manage Accounts - A user can manage all his accounts from here.

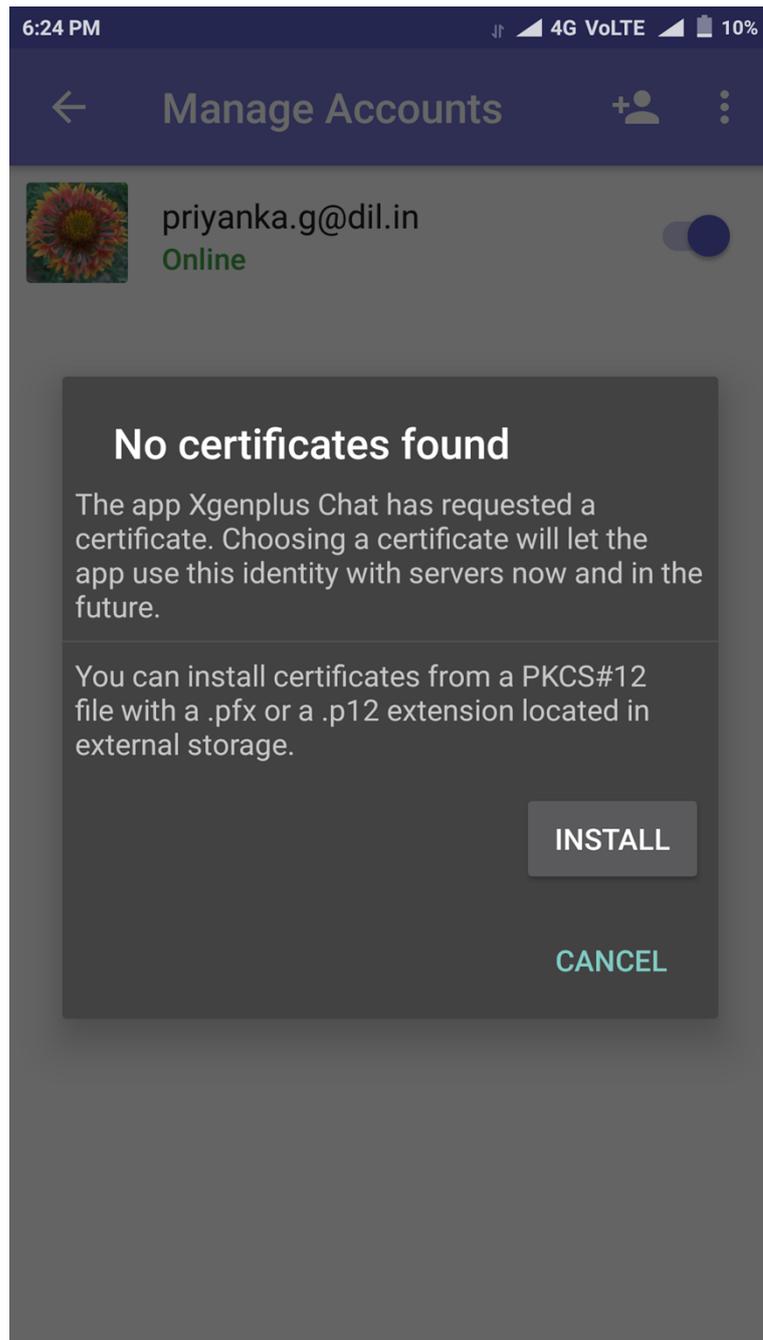


A user can

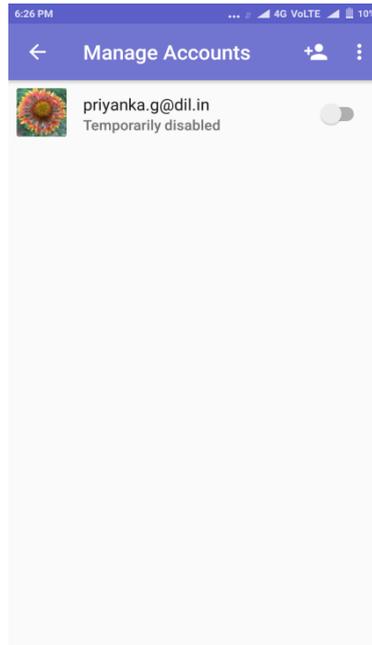
- Add Account  - Add/configure a new chat account by entering the email id and password.



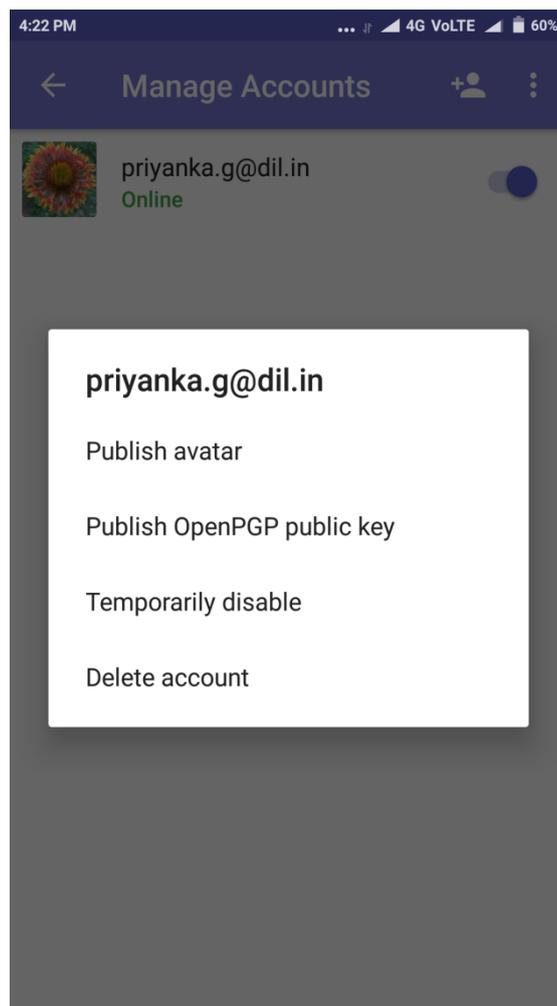
- Menu
 - ✓ Restore Backup- User can back up content, data from the chat account. He can restore all his chat data on his local phone memory.
 - ✓ Add account certificate -Choosing a certificate will let the app use this identity with servers now and in the future.



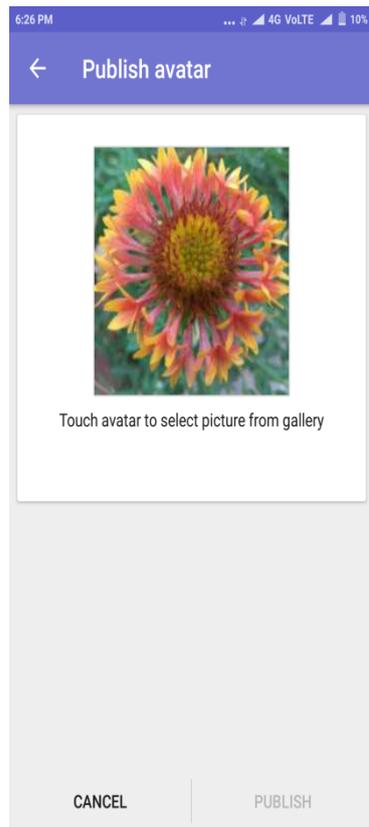
Disable all accounts - User can disable all account at once temporarily with just a single tap.



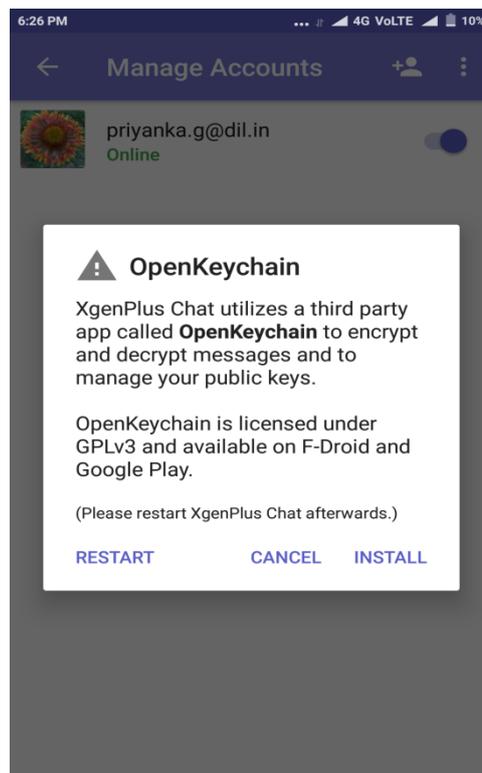
On long pressing of account, a user will get



Publish Avatar - From here a user can change the profile picture of the chat.

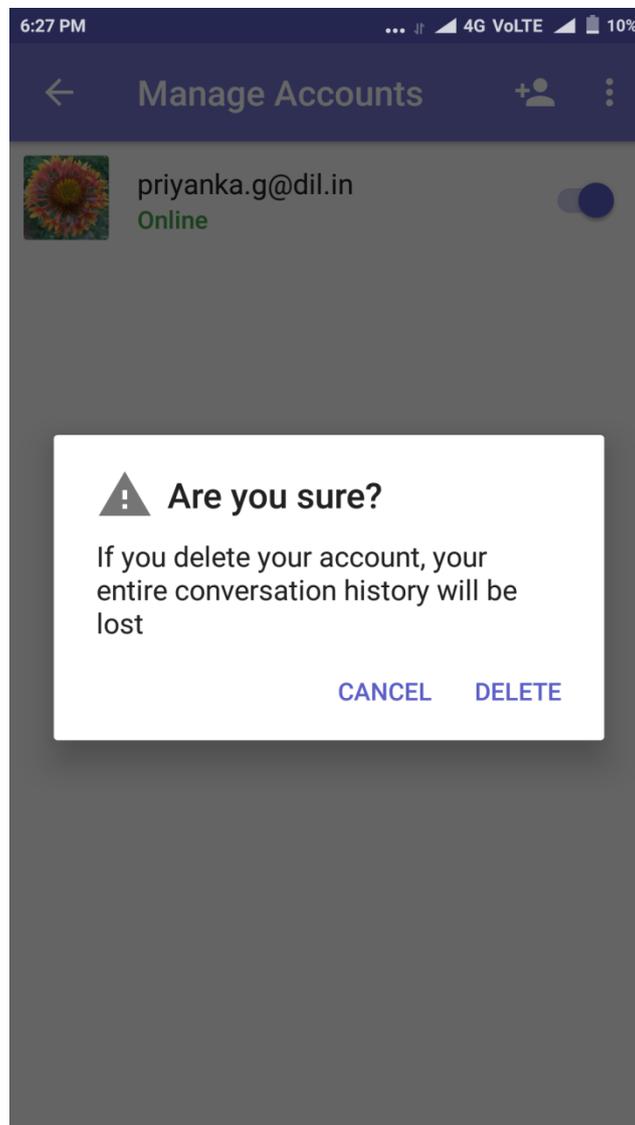


Publish public key – Xgen IM utilizes open key chain to encrypt and decrypt messages and manage public keys.

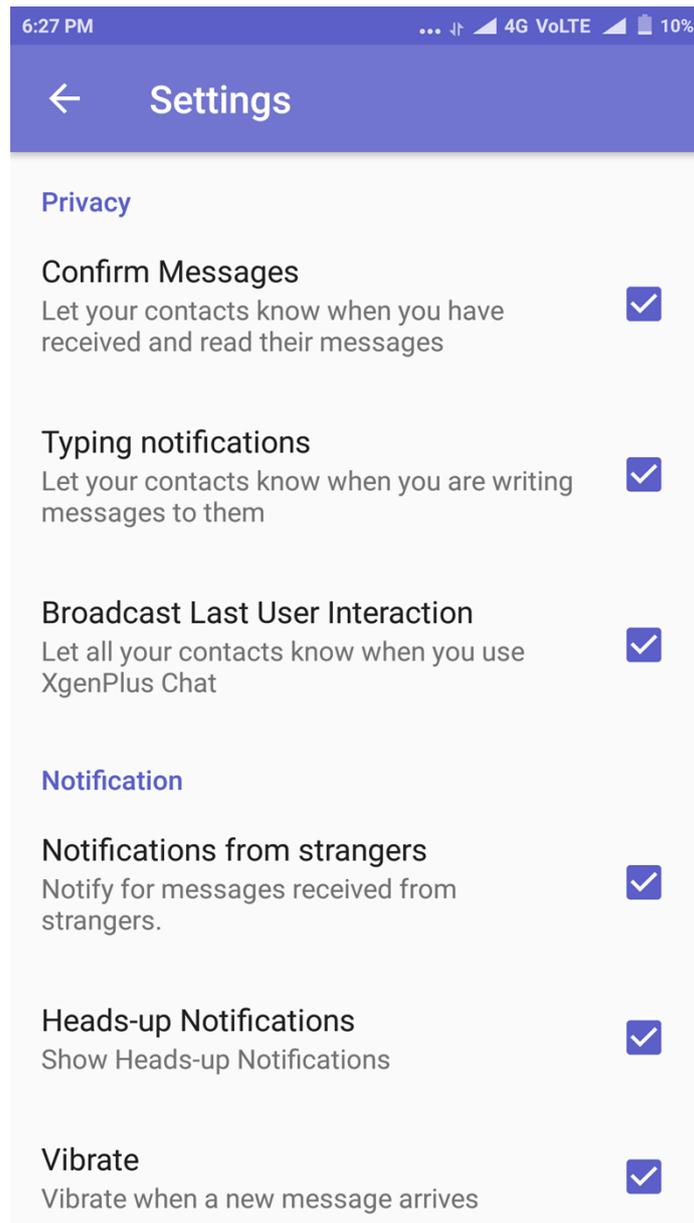


Temporarily disable - A user can temporary disable the chat account. User profile, photos will be hidden until he deactivated his account

Delete account - Permanently delete the account

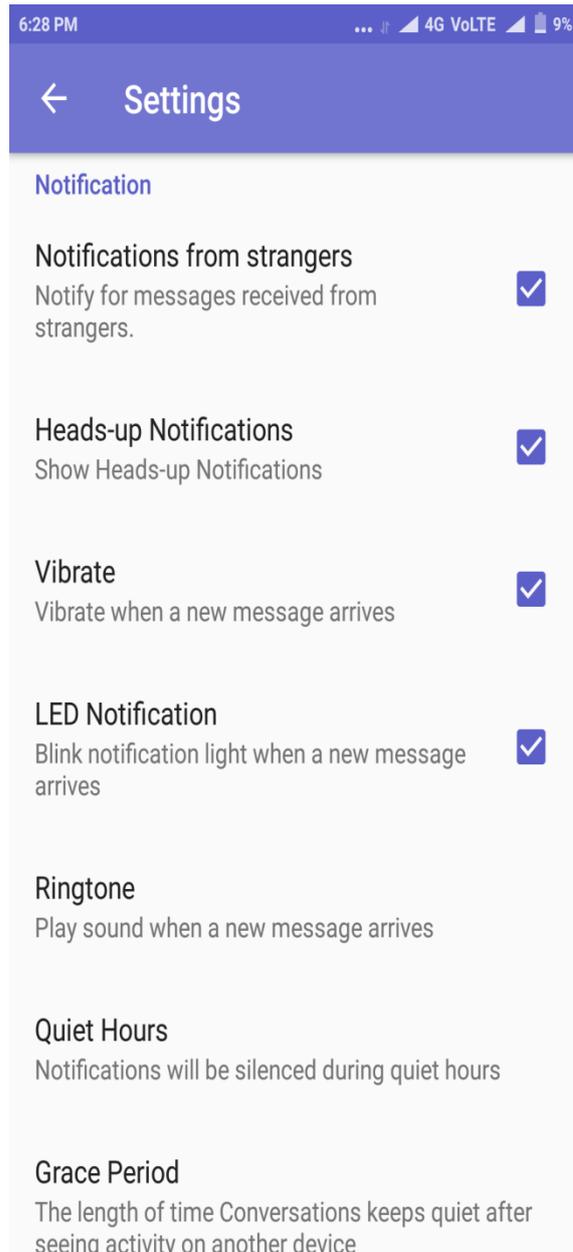


Settings - From here a user can manage all his chat account settings.



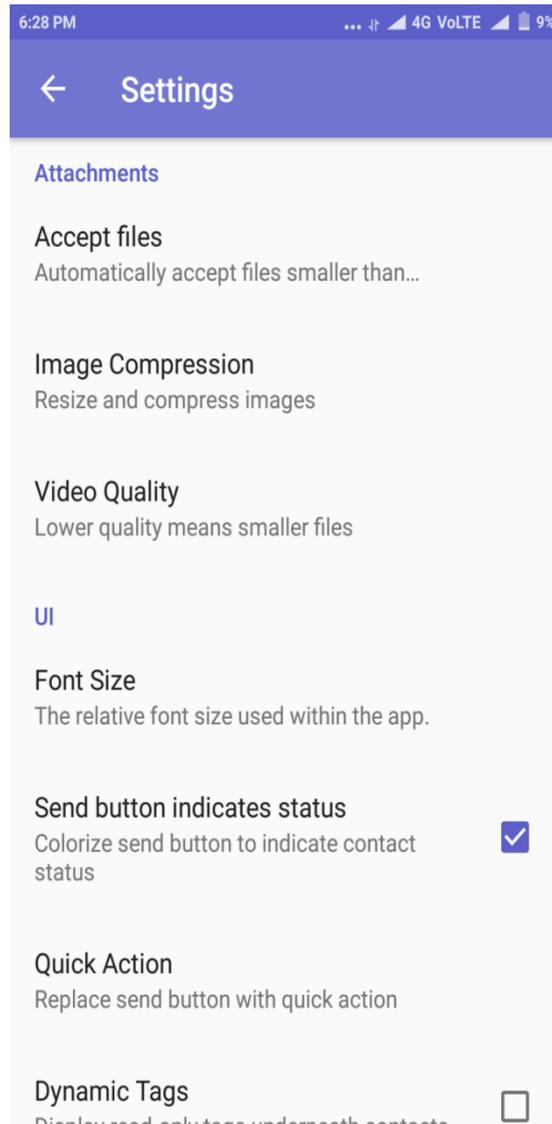
- **Confirm Messages** - Enable or Disable contacts to keep watch on the received and read messages.
- **Typing Notifications** - Let your contacts know when you are writing a message to them.
- **Broadcast Last User interaction** - Let all your contacts know when you use Xgen IM.

Notifications



- Notifications from strangers - Notify for messages received from strangers (one who is not available in your contact)
- Heads up Notifications - Show Heads-up on the device when the device is locked.
- Vibrate - Vibrate when any new message arrives
- LED Notification - Blink notification light when a new message arrives
- Ringtone - Play sound when a new message arrives
- Quiet Hours - Stop receiving notification for a few hours.
- Grace Period - Allows conversations to be quiet after seeing activity on another device. User can either disable or change the grace period to short, medium & long

Attachments



- Accept Files - User can set the size of a file he can receive
- Image Compression - Allow to compress image automatically, never or always.
- Video Quality - Allow to compress video to medium (360p), High (720p) or original (Uncompressed) quality

UI

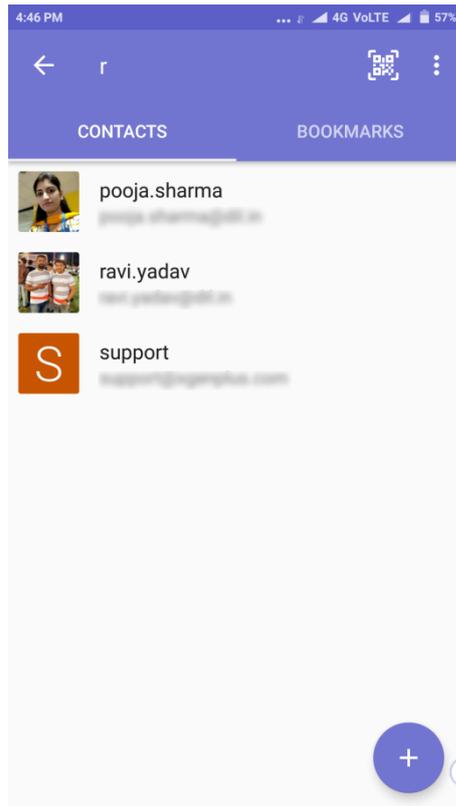
- Font Size - Change the font size within the app
- Send button indicates status - Enable or Disable color change on the send button to indicate the status of the contact
- Quick Action - User can replace send button with any of the quick actions lists including none, most recently used, take a picture, record video, choose picture, record voice & send location
- Dynamic tags - Display read-only tags underneath contacts

Advanced

- Never Send crash reports - Allow/disallow the notification asked to send report to incase Xgen IM app get crashed

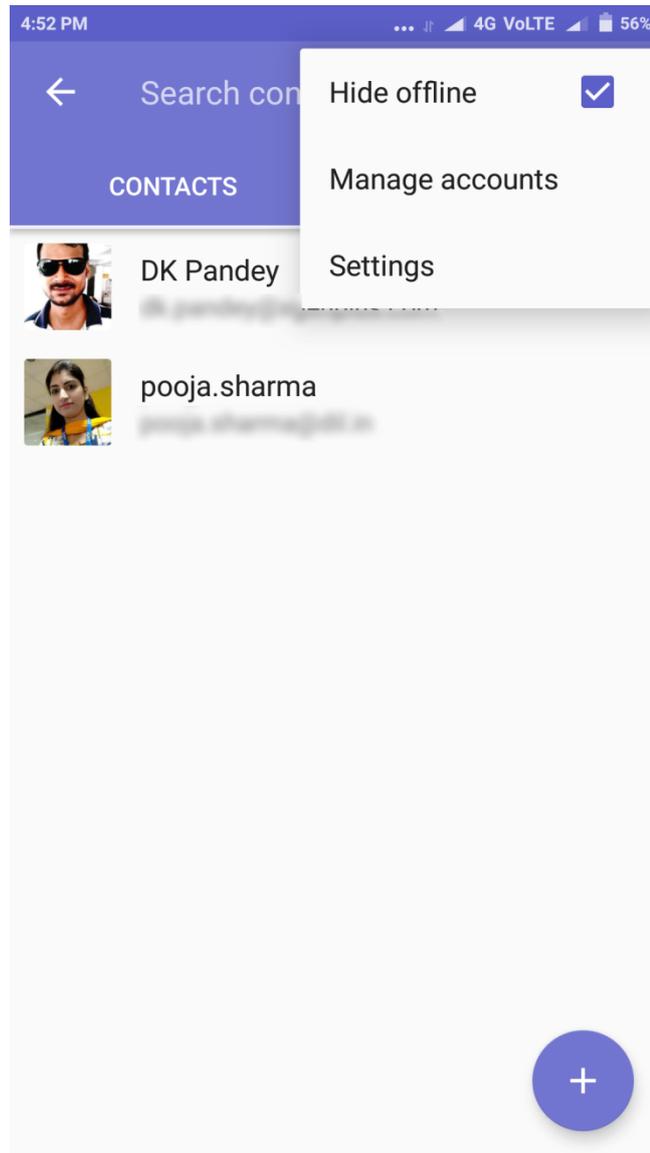
3. Messaging Chat

- Search - User can search for the contacts by start typing their ID in the search bar.

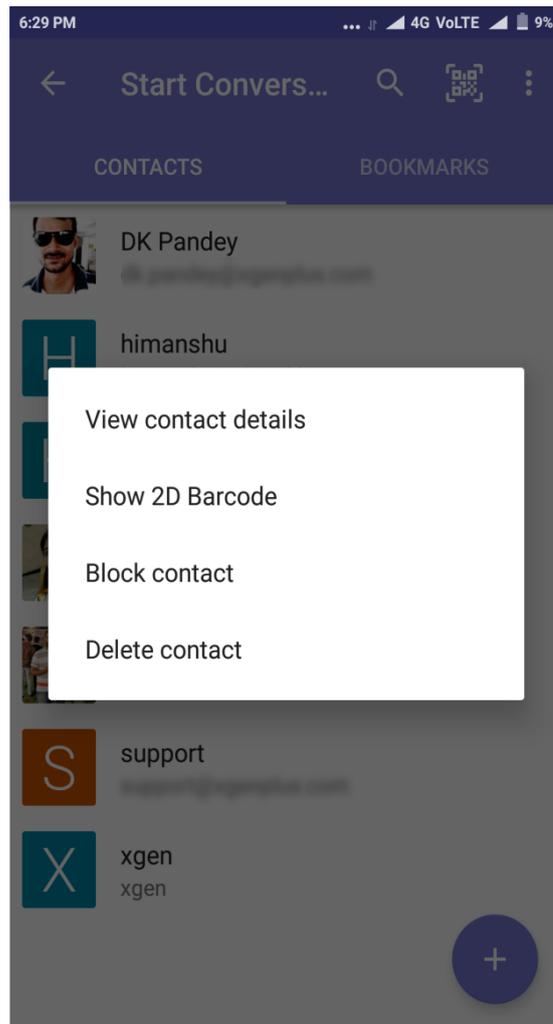


Menu

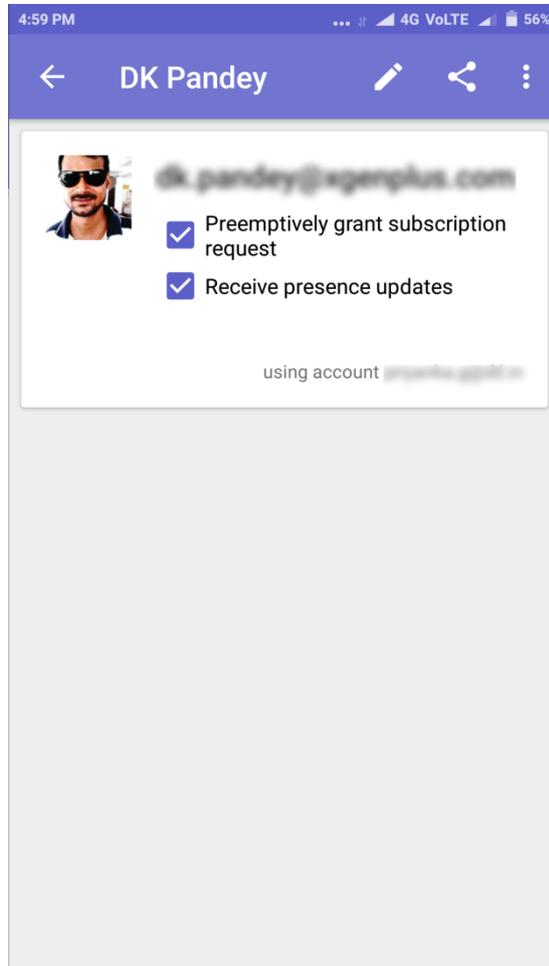
- Hide Offline - User can hide/unhide contacts which are offline or inactive on chat.



- Contacts - On long pressing, any contact user perform the following mentioned task



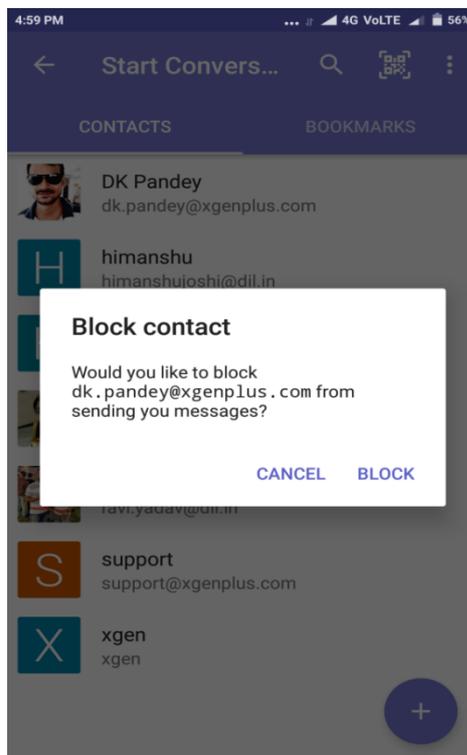
- View Contact Details - User can check and the details such as email id associated with the chat, send and receive presence updates of the contact.



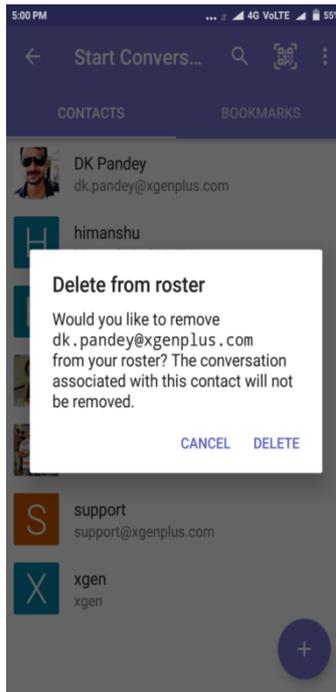
- Show 2D Barcode



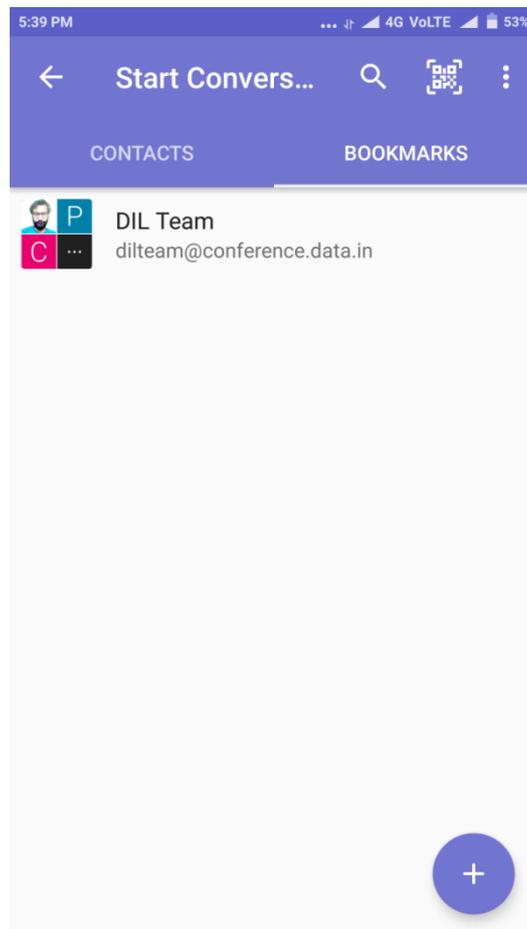
Block contact



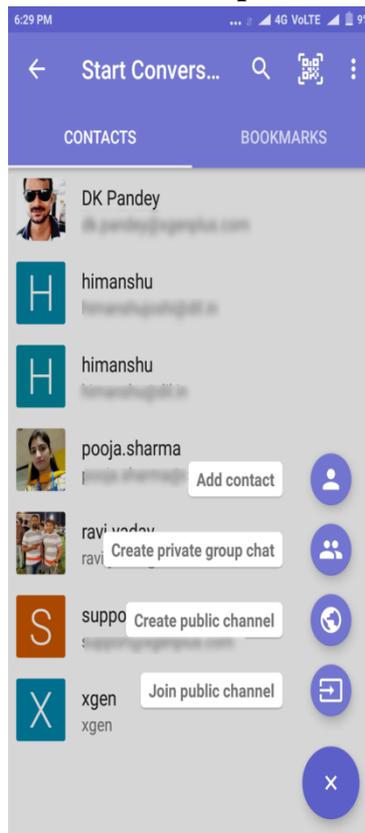
Delete Contact



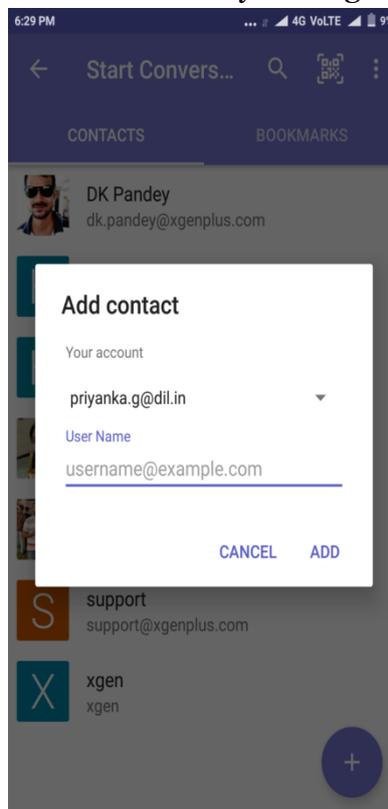
Bookmarks - Bookmark allows user to save chat for the future reference.



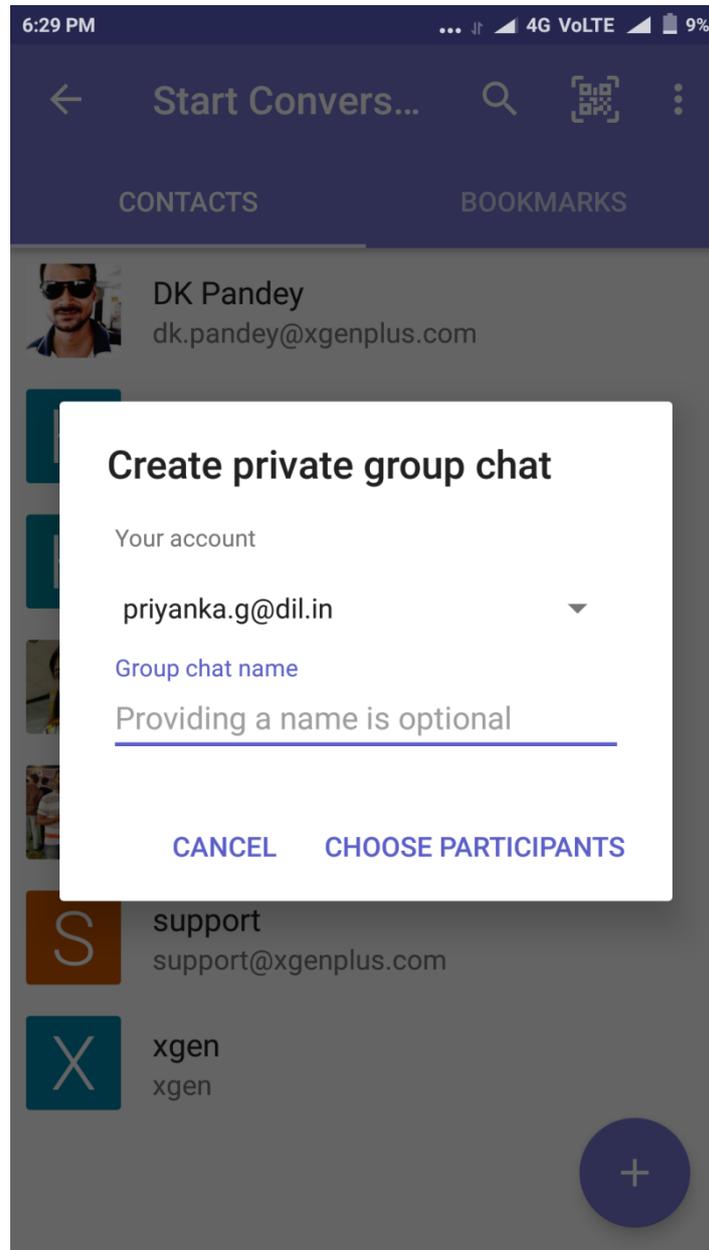
Add  - Clicking on the + icon user can perform the following actions:-



Add Contact - User can add the contacts by adding username

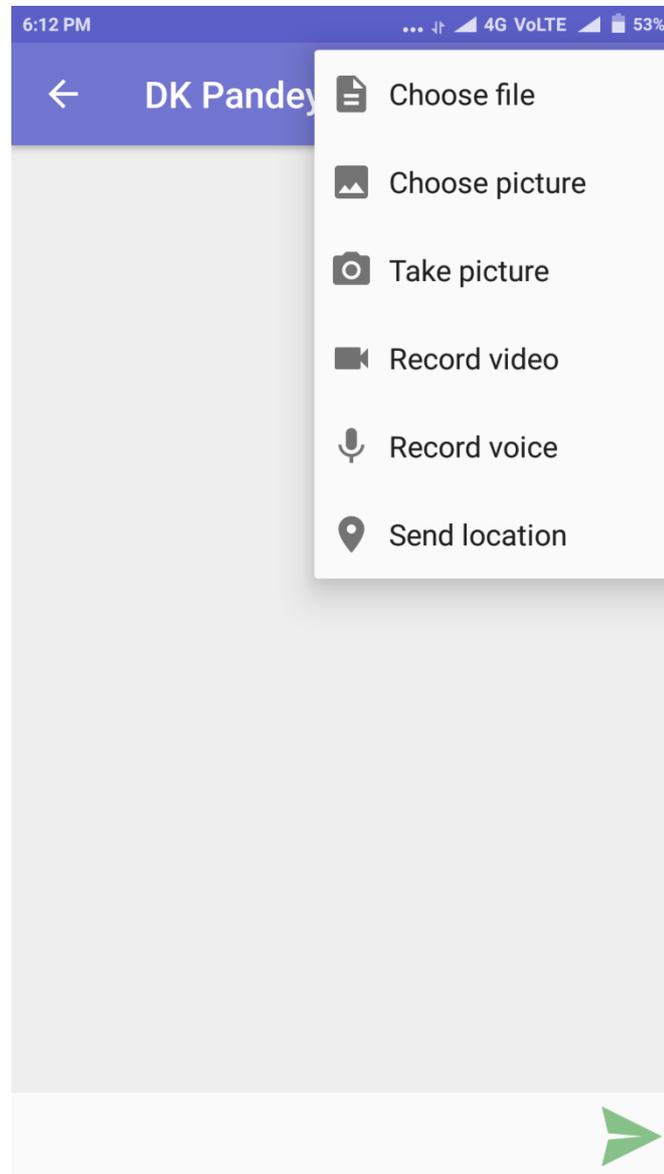


Create Private Group Chat - User can create a private group that can be accessed only by the participant of the group admin.

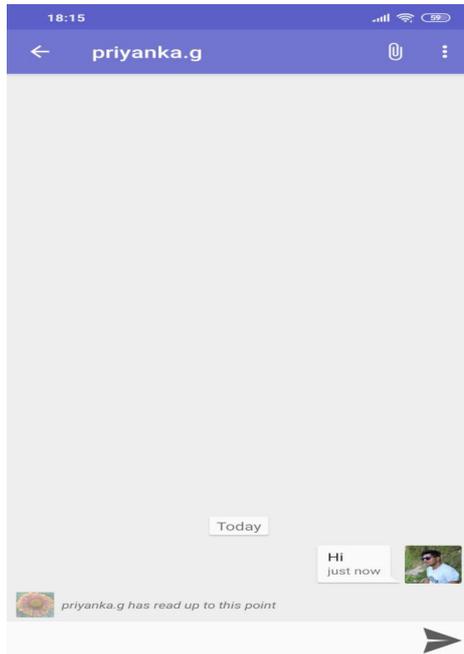


Do more within the chat

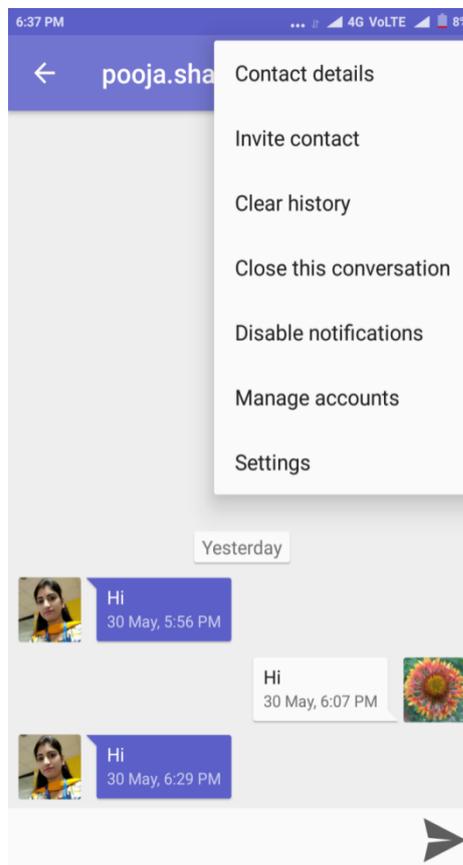
- Start your conversation within a group or individually. Send/ receive text, audio, video, file location. Record audio & video and more can be done.



- See when your message has been read, who is typing in the chat and more.



- Actions that can be performed on the individual/group chat menu



Contact/Channel Details: User can view details of all participants within the group or individually. Here, the user can also invite new members from the contact list.

Invite Contact: When you click on the menu, you will get invite contact option, on clicking this option you can add new members from your contact list.

Clear history: After clicking on clear history option from the menu bar, your all conversation and messages will be deleted from the chat.

Note- This will not delete copies of those (deleted) messages that are stored on other devices or services.

Close this conversation: Xgen IM gives you an option to hide your chat without deleting it.

Note- Archived chats will reappear when you receive a new message from that (hide) conversation.

Disable notifications: When you turn notification setting off, your notification will not vibrate on the device. You can turn off notification as per your desired timings.

Manage accounts: By selecting managed accounts option you can set your online and offline status. Once you clicked on the toggle button you can temporarily disabled from the chat. You can connect or temporarily disconnect through this button.

14.Attendance& Team Management System

XgenPlus Email App has emerged to relieve the hard work of HR / Managers to manage the company's employees and Team member's attendance. Managing the location and attendance of field / remote workers have become easy as this can now be done through the XgenPlus Attendance Management System.

This feature allows HR to manage employee's attendance and keep track of the field team. Now employees can mark their attendance remotely from the app itself and share their live location as well. XgenPlus attendance management system is built within the email app that eliminates the need to install any third-party application(s). Admin gets access to decide the tracking of an individual or a group of individual. Admin can enable the tracking fully or partially as per the business requirement.

Need For Attendance Management System

Tracking and managing Attendance is a crucial part of any organization's employee management protocol. It is a complex task for the management to track and mark the presence/absence of each and every employee working on field/remotely.

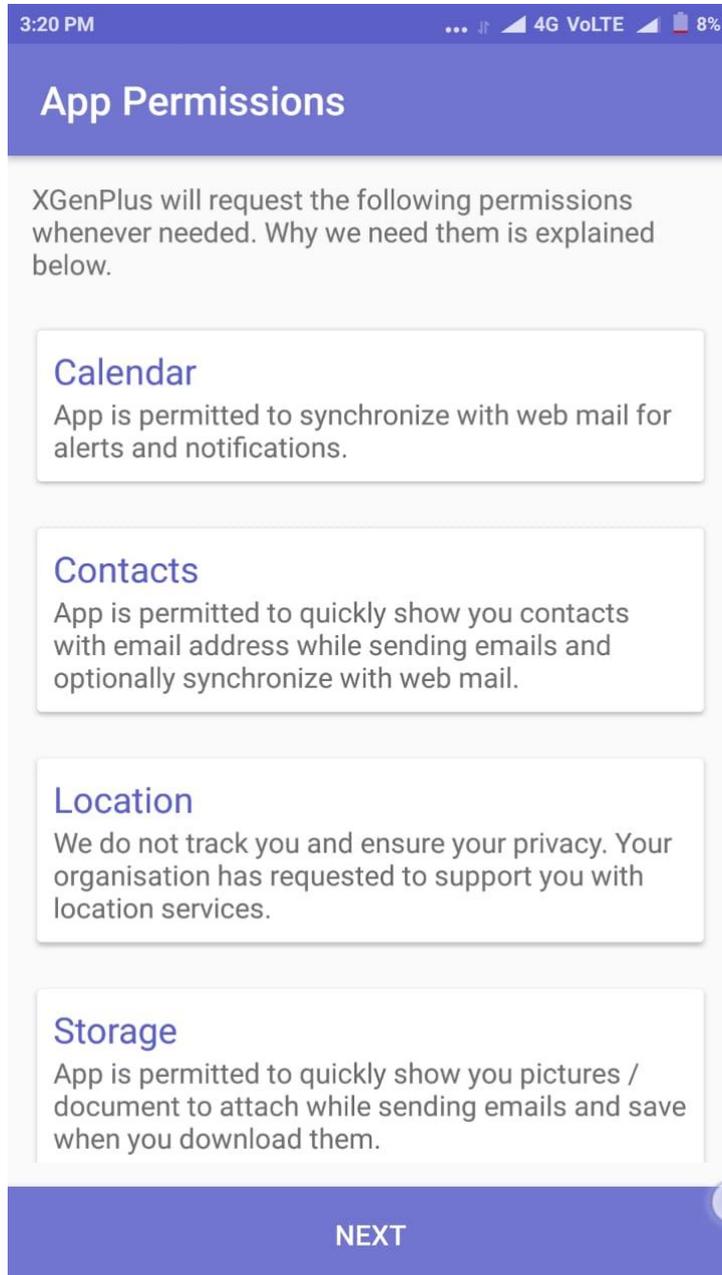
Attendance marking is a tedious job for the employees who need to visit the office to mark the attendance and then go on the field for the work. Still, the employer is not sure about the current work location of his team. This calls for an urgent need for the workforce system to integrate attendance management with the app and with the payroll system.

With the Geo Tracking System built within the XgenPlus mobile app, the manager can now have access to know the location of his team. XgenPlus attendance marking system can bring the ease of tracking and managing the attendance. Employees can check in and out & share live location from the mobile app anytime; anywhere. HR can have the record and validate the marked attendance for off campus employees. XgenPlus mail app is integrated with the payroll system so the moment employee marks the attendance; it directly gets updated in the payroll system making the process seamless and error free.

Steps:

Install the XgenPlus Email app and open.

Accept the permissions and Tap “**Next**”.



Welcome to XGenPlus

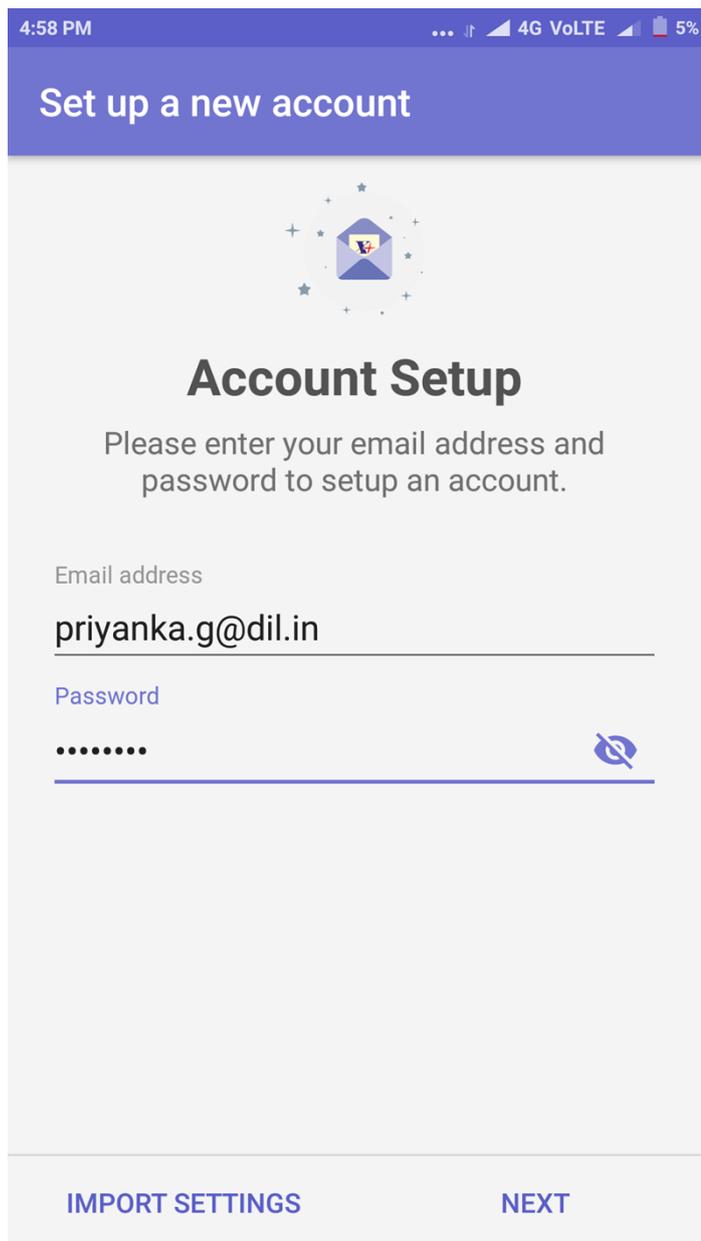
XGenPlus is a powerful free email client for Android.

Its improved features include:

- * Push mail using IMAP IDLE
- * One-to-one chat
- * Call log backup
- * Call Recording (optional backup)
- * Push mail using IMAP IDLE
- * SMS log backup
- * Chat Conferencing
- * Better performance
- * Message refiling
- * Email signatures
- * Bcc-to-self
- * Folder subscriptions
- * All folder synchronization
- * Return-address configuration
- * Keyboard shortcuts
- * Better IMAP support
- * Saving attachments to SD
- * Empty Trash
- * Message sorting
- * IDN (Internationalized domain name) Compliant
- * EAI (Email Address Internationalization) Compliant
- * Delivery and Read Notifications
- * OTP Code without SMS
- * ...and more

[NEXT](#)

Enter your Email_ID and Password (Provided by your admin).



4:58 PM 4G VoLTE 5%

Set up a new account



Account Setup

Please enter your email address and password to setup an account.

Email address

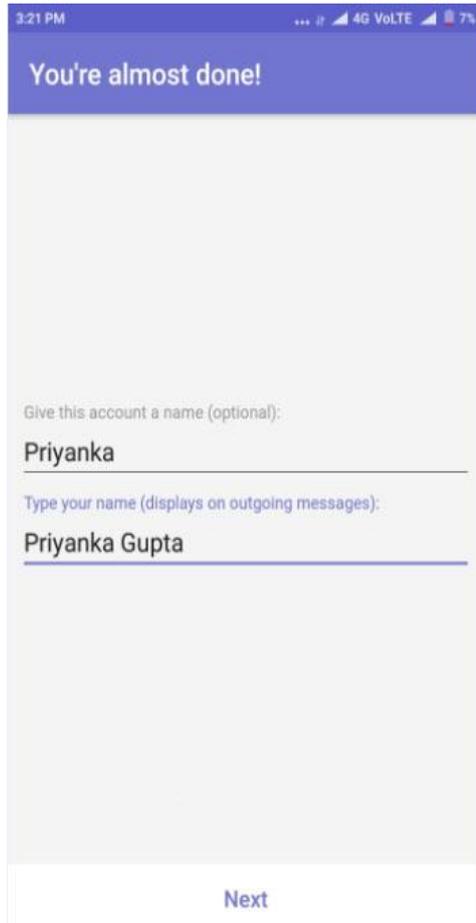
priyanka.g@dil.in

Password

.....

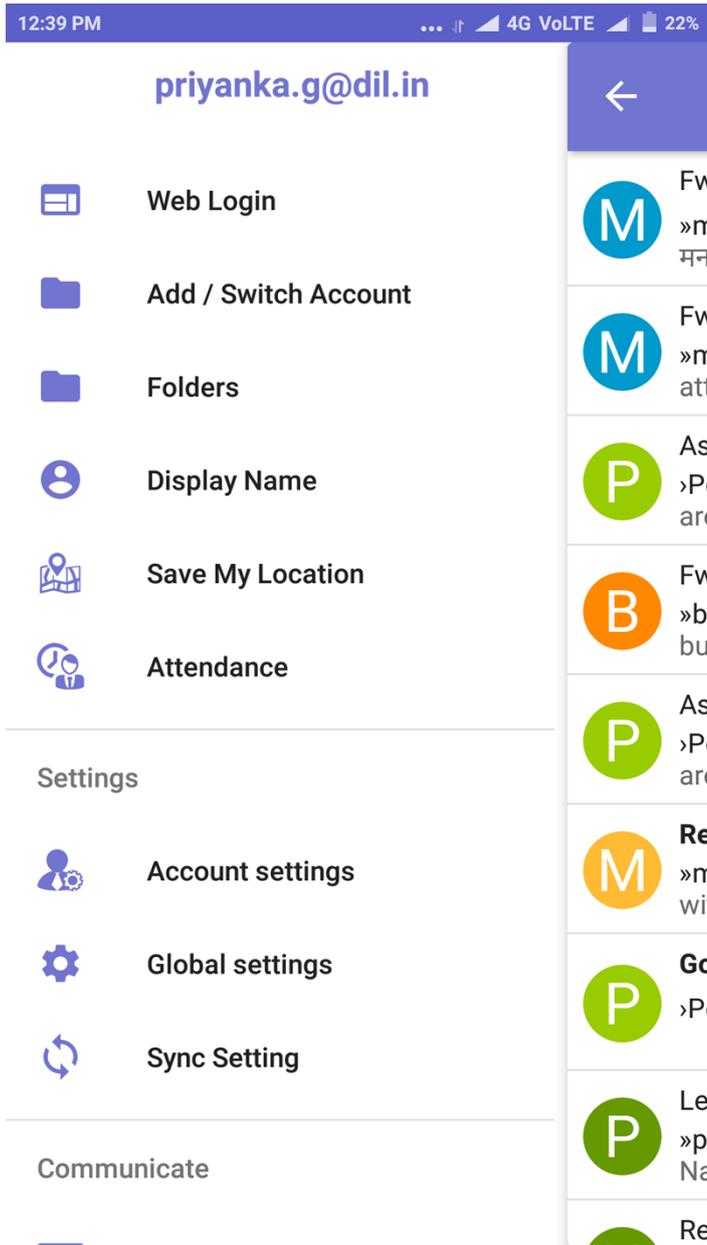
IMPORT SETTINGS NEXT

Now, enter your display name and Tap “**Next**”.

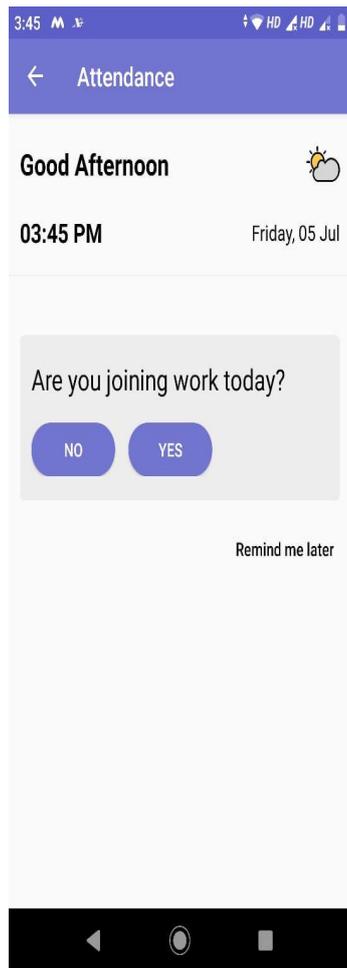


Tap on allow permissions of contacts & calendars.

Go to the menu option and tap on "Attendance".



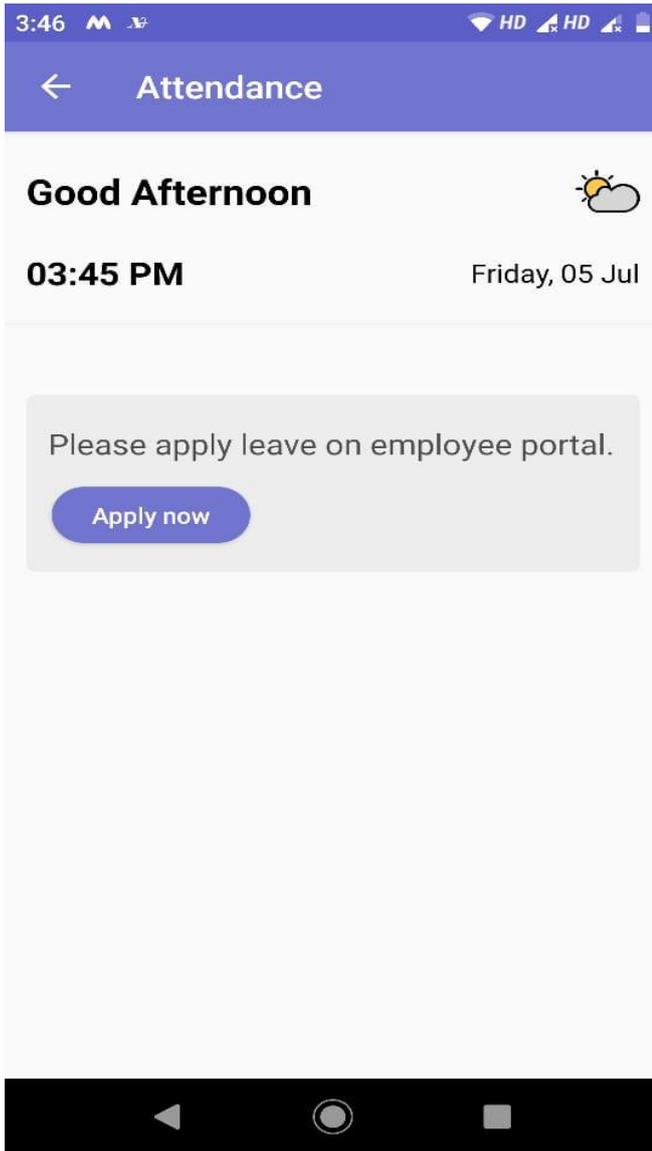
The application will ask you “**Are you joining work today?**”



Case 1) If you tap on the option **No**.

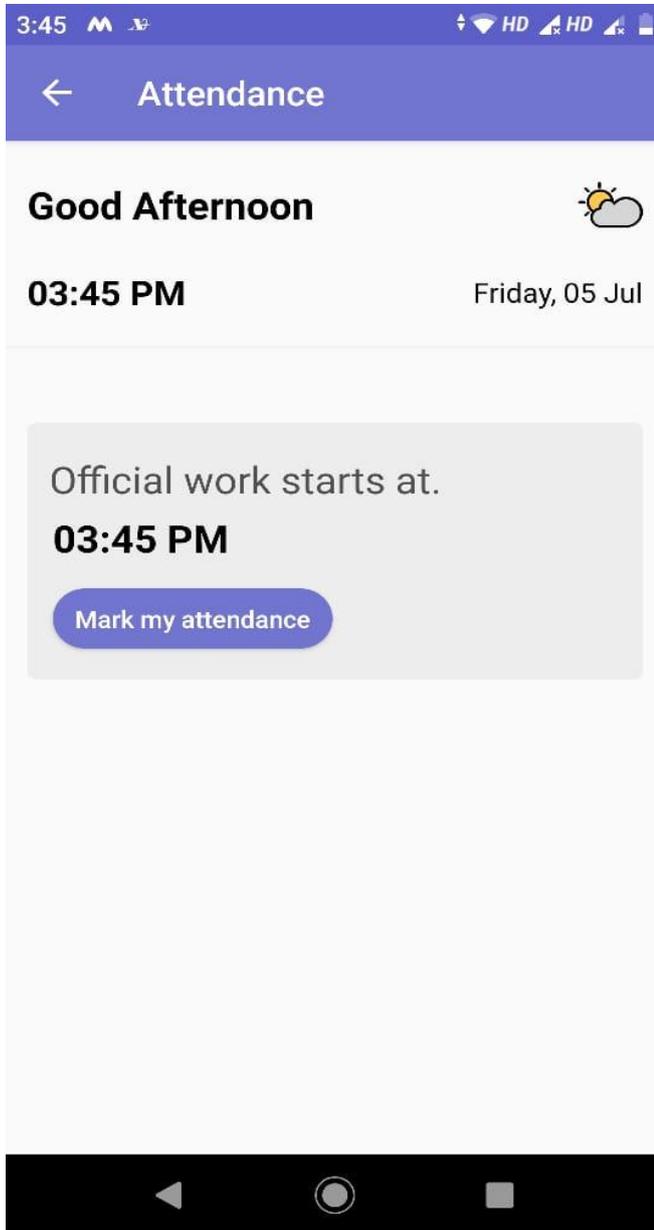
The app will bring you to the next step where it will ask you to apply leave on employee portal.

Tap on “**Apply Now**” it will get redirected to the employee portal where you can apply for the leave.

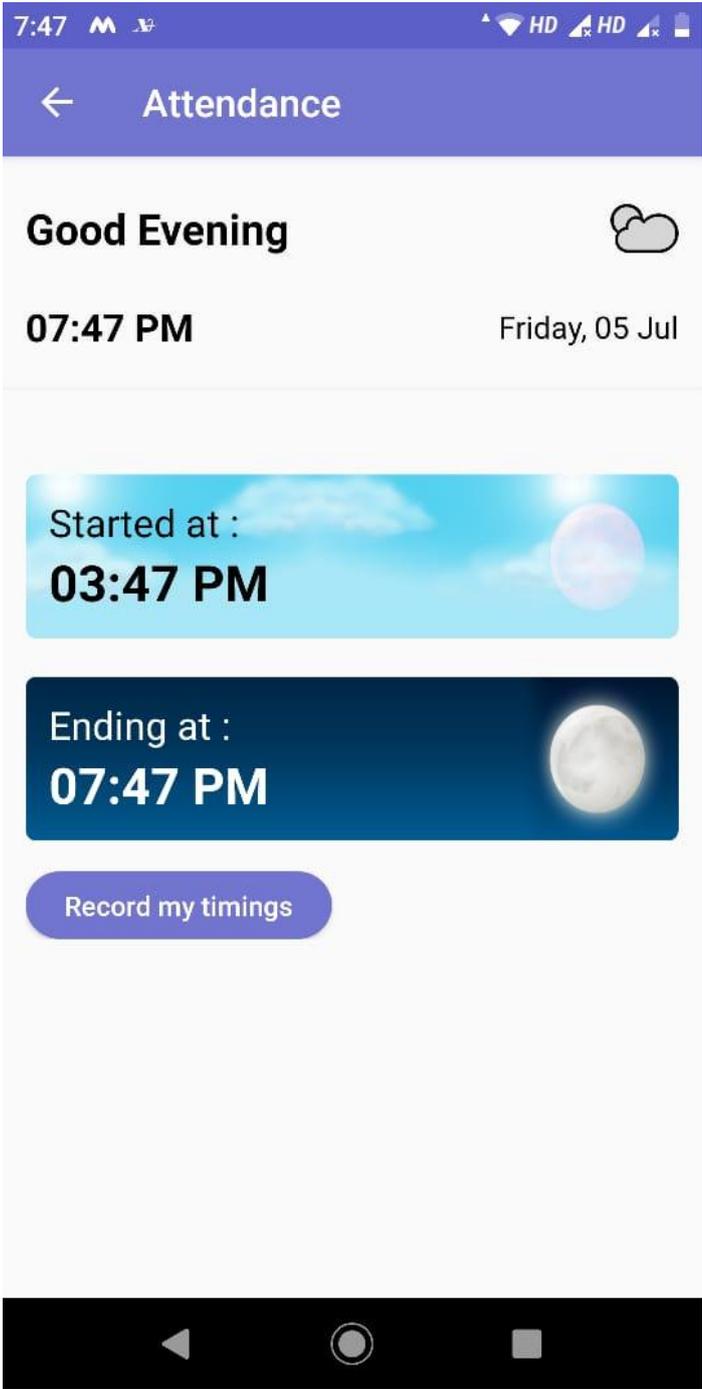


Case 2) If You tap on the option **Yes**.

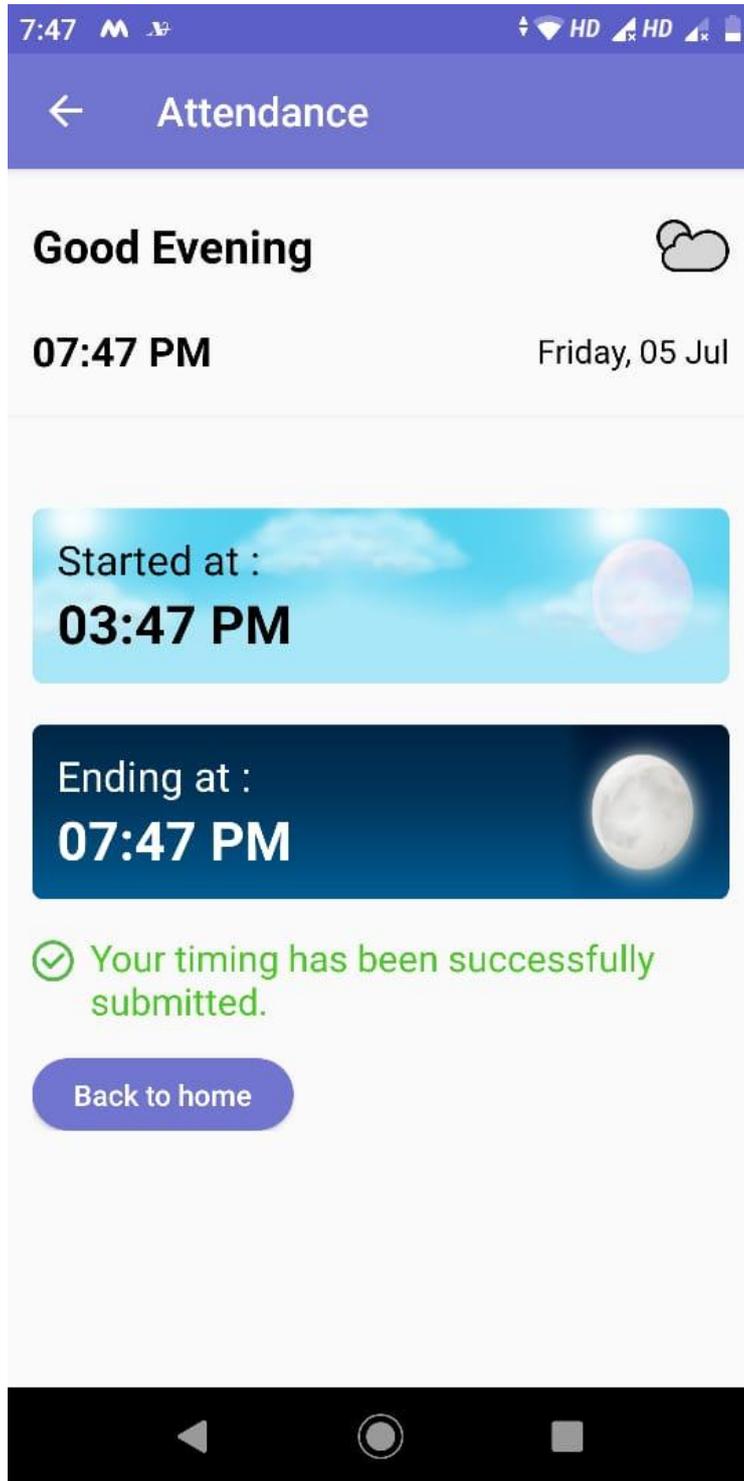
The app will mark the attendance time from the server and your official work will start from that time. Now Tap on “**Mark my attendance**” to mark attendance.



Now, when you tap on the “Attendance” option again then your actual working hours will be counted from start time till this time.

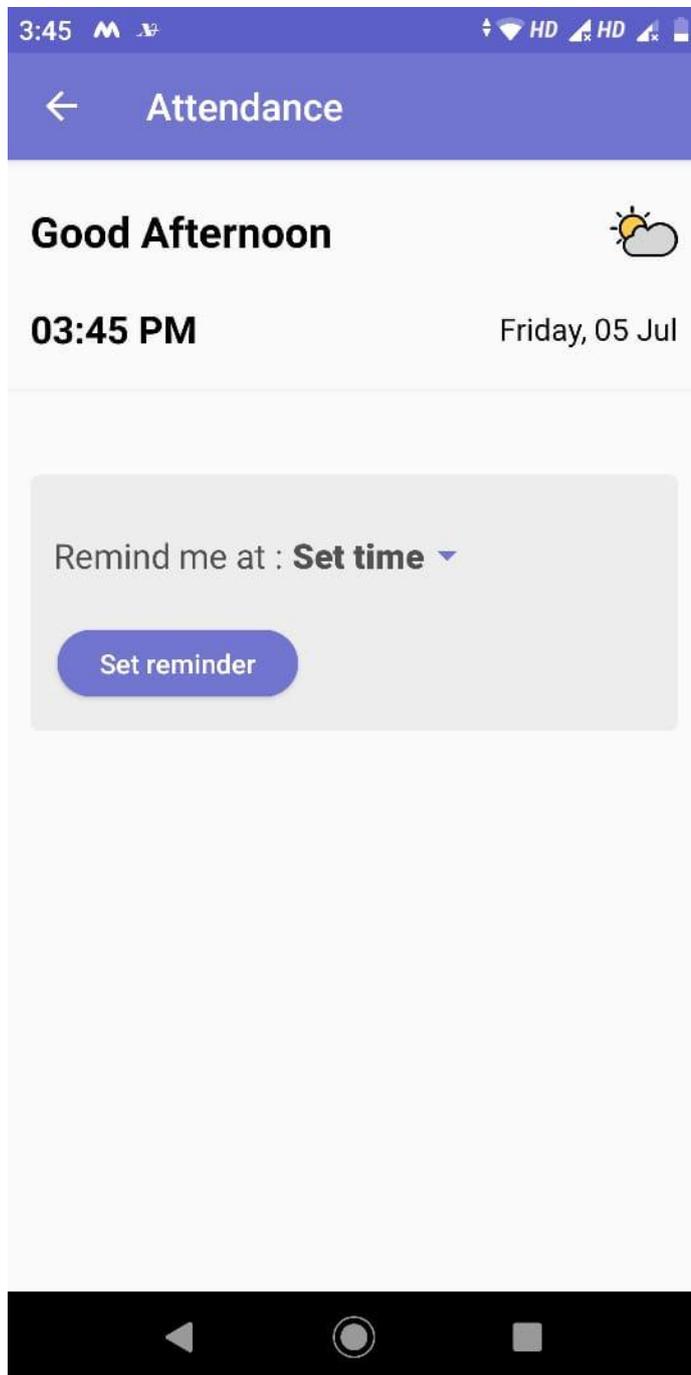


When you tap on “Record my Timing”, time will be updated in the payroll system.

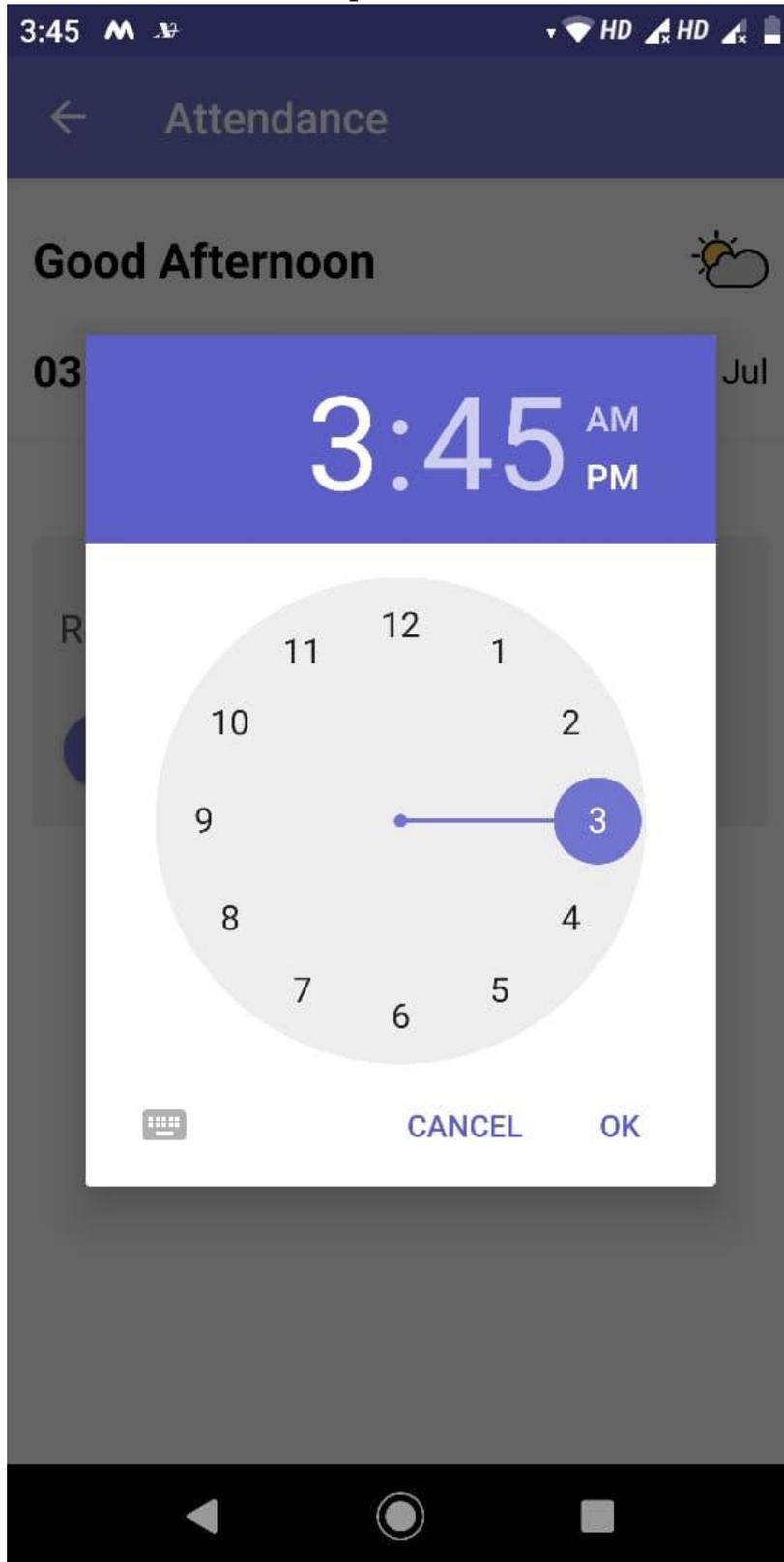


Case 3) If You tap on the option **“Remind Me Later”**

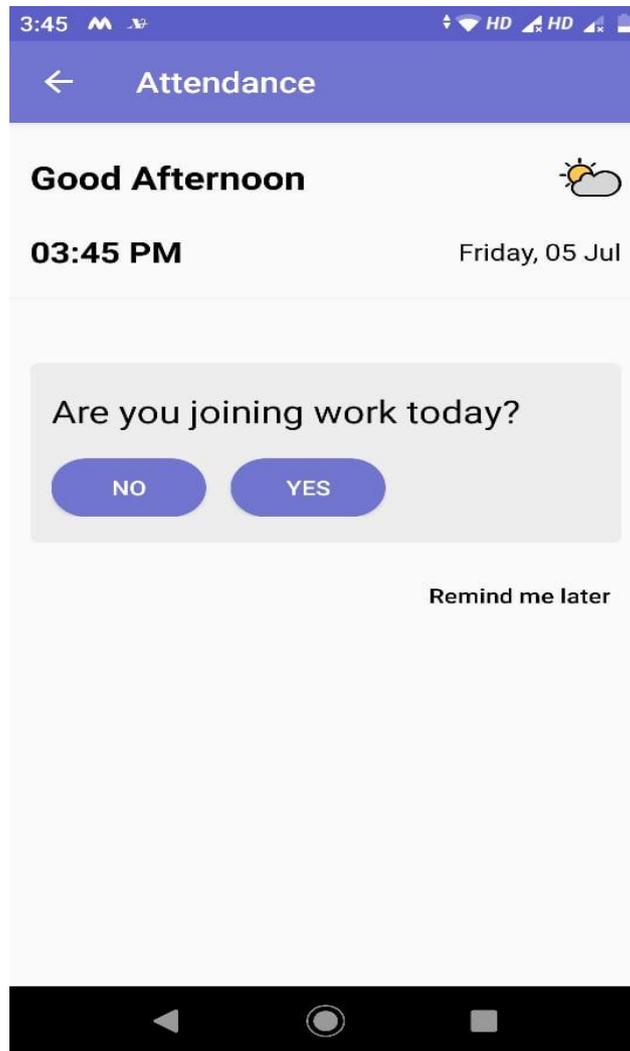
You can set reminders to mark attendance at your set time. Tap on **“Set Reminder”**



Set reminder time and tap on **OK**



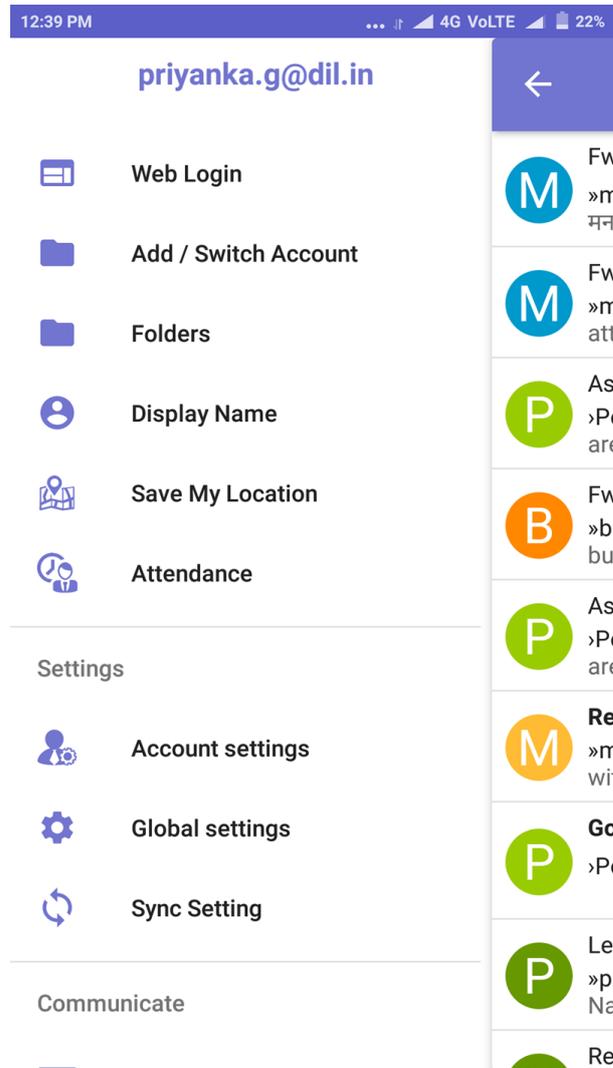
At the set time, a push notification will appear on your mobile screen. Tap on the notification and mark your attendance.



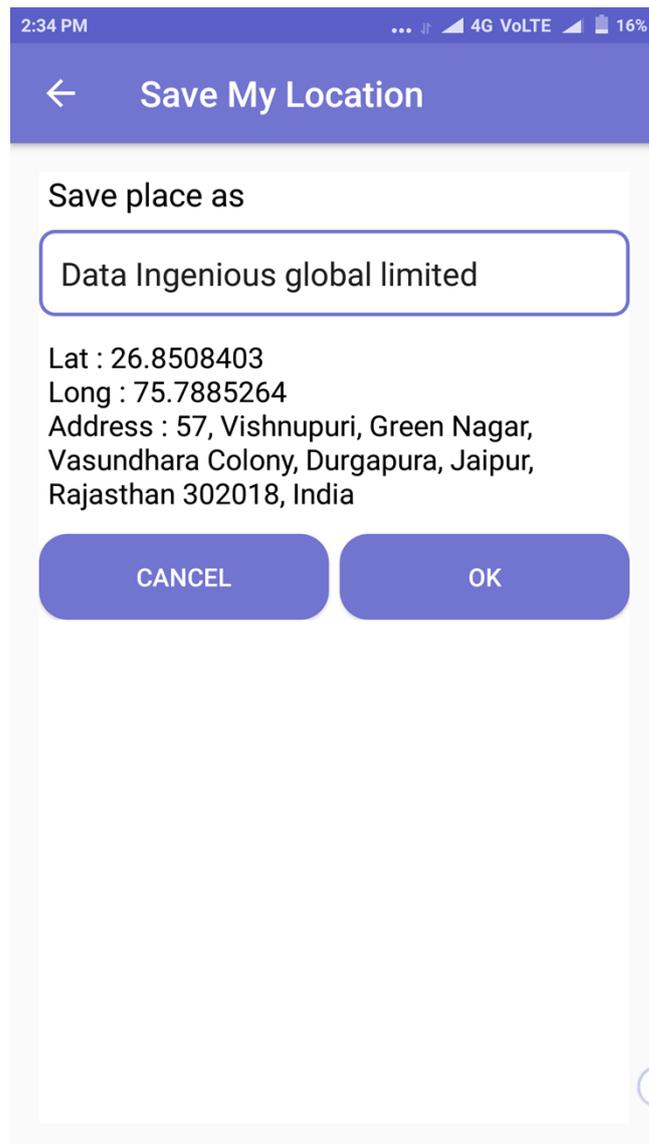
Save My Location

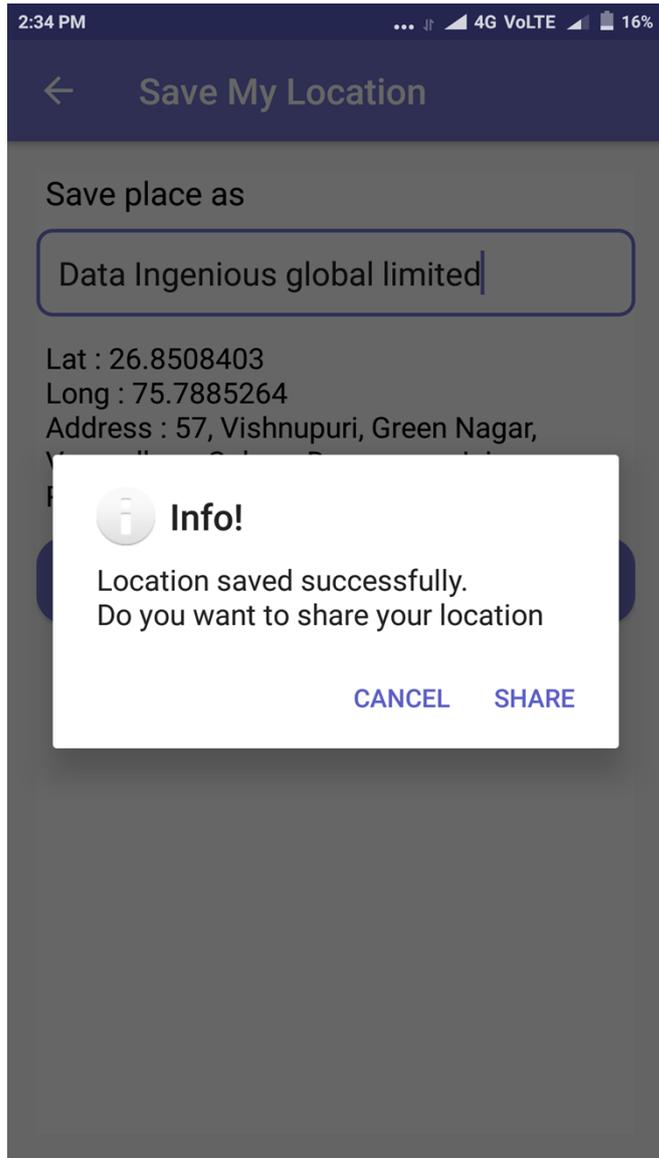
Employee can save his live location and share it with anyone. To share the live locations go to menu and tap on “**Save My Location**”.

Once the location is enabled, your reporting (concerned person) can view the locations as per his requirement.



Enter the place name and tap OK.





Now tap on **Share** to share the location

Save My Location

Save place as

Data Ingenious global limited

Lat : 26.8508403

Long : 75.7885264

Address : 57, Vishnupuri, Green Nagar,
Vasundhara Colony, Durgapura, Jaipur,
Rajasthan 302018, India

Share via



Transfer data-free



WhatsApp



Skype



Xgenplus Chat



LinkedIn



Facebook



Messaging



XGenPlus

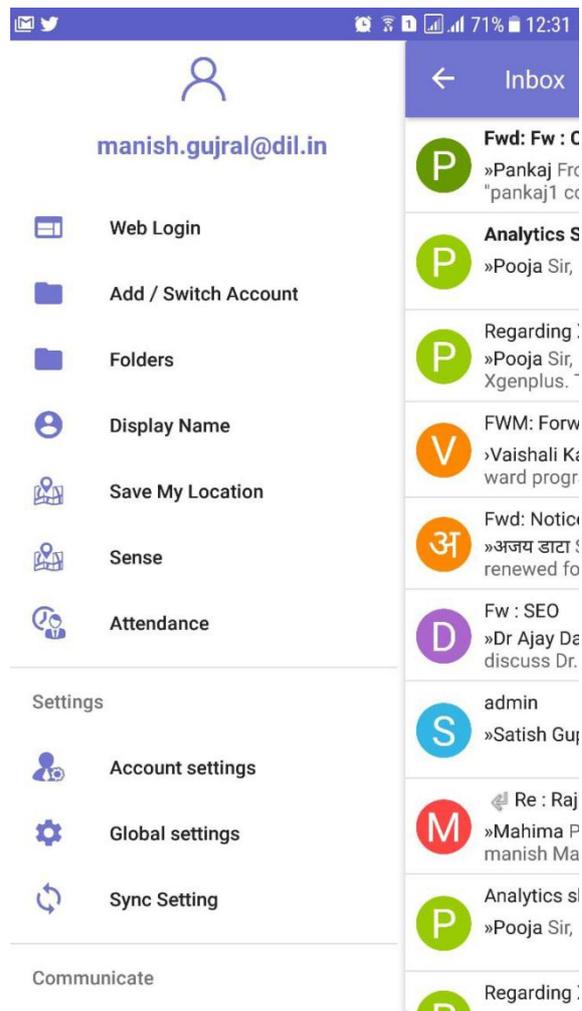


Cancel

Sense

Sense feature option is for the managers handling the team. The manager can check all the locations saved by his team at different locations.

Let's say, the admin has enabled your location tracking with a condition that after hour the location should be captured, so after every hour the app will automatically send the updated location of the field employee to the admin / HOD which will be visible in the sense feature.



Sense

priyanka.g@dil.in

To 01/07/2019 From 15/07/2019

Date : 05 Jul 2019 15:48:05
Latitude : 26.8508402
Longitude : 75.788526000000005

Date : 05 Jul 2019 15:48:44
Latitude : 26.8508402
Longitude : 75.788526000000005

Date : 05 Jul 2019 15:59:37
Latitude : 26.8508399
Longitude : 75.788526300000001

Date : 05 Jul 2019 16:00:05
Latitude : 26.8508399
Longitude : 75.788526300000001

Date : 05 Jul 2019 16:05:08
Latitude : 26.850843999999999
Longitude : 75.788518499999995

Date : 05 Jul 2019 16:06:57
Latitude : 26.850843999999999
Longitude : 75.788518499999995

Date : 05 Jul 2019 16:30:46
Latitude : 26.850860999999998
Longitude : 75.788526000000005

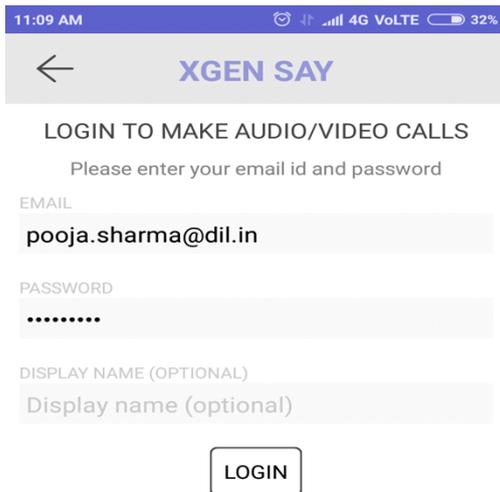
15.Xgen Say

It is designed to communicate with team members without any contact number. User can login to Xgen Say by using their email ids. User can make an audio, video, conference calls as required.

In today's digital communication world making interaction fast, secure & reliable and stay connected with your colleagues, peers, teammates anytime anywhere as well as attending a meeting when you are not available in the organization every business needs a secure and reliable Audio/Video calling App. Xgen Say is SIP phone for voice/video calls available on your mobile and SIP phone at your desk. Xgen Say allows secure calls through secure user authentication with TLS to make audio/ video calls secure and encrypted.

Digital communications including audio and video are sensitive user data that need to be protected against unauthorized access. Xgen Say make your email address as your stand alone identity for everyone, no need to share your mobile or any other number to communicate with team members. User can talk unlimited on Wi-Fi or 3G/4G internet connection.

Steps:



11:09 AM 4G VoLTE 32%

← XGEN SAY

LOGIN TO MAKE AUDIO/VIDEO CALLS

Please enter your email id and password

EMAIL
pooja.sharma@dil.in

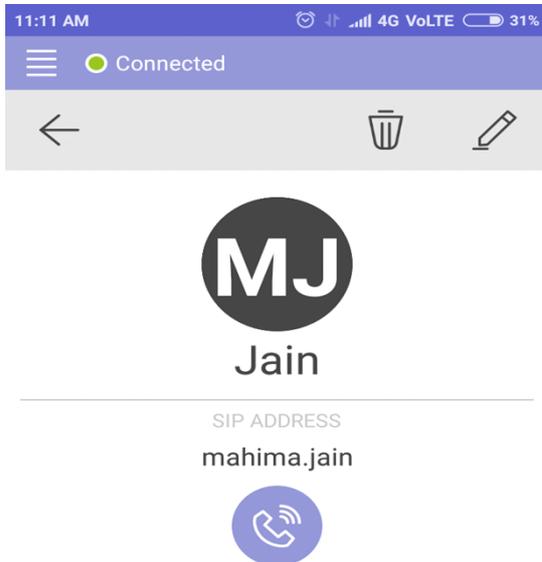
PASSWORD
.....

DISPLAY NAME (OPTIONAL)
Display name (optional)

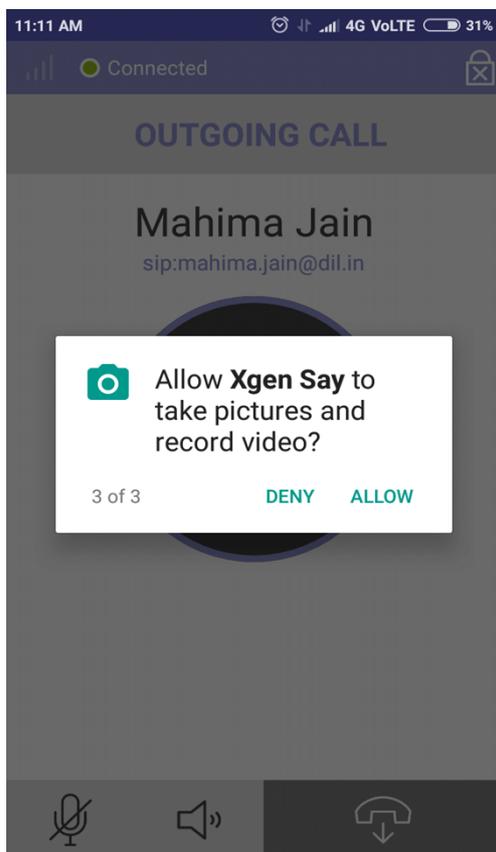
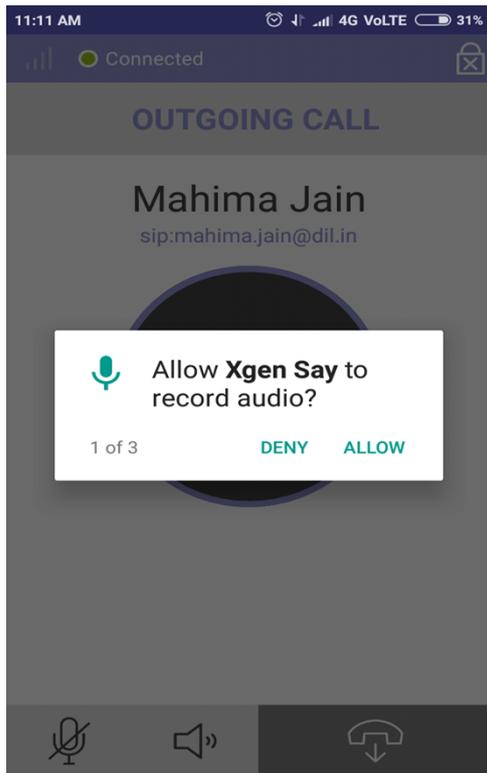
LOGIN

If your email ID is not working. Get Free ID from [Datamail App](#) and login.

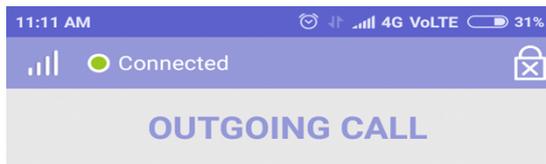
Select the contact with whom user want to connect



•Allow Permission



Make an Outgoing Call

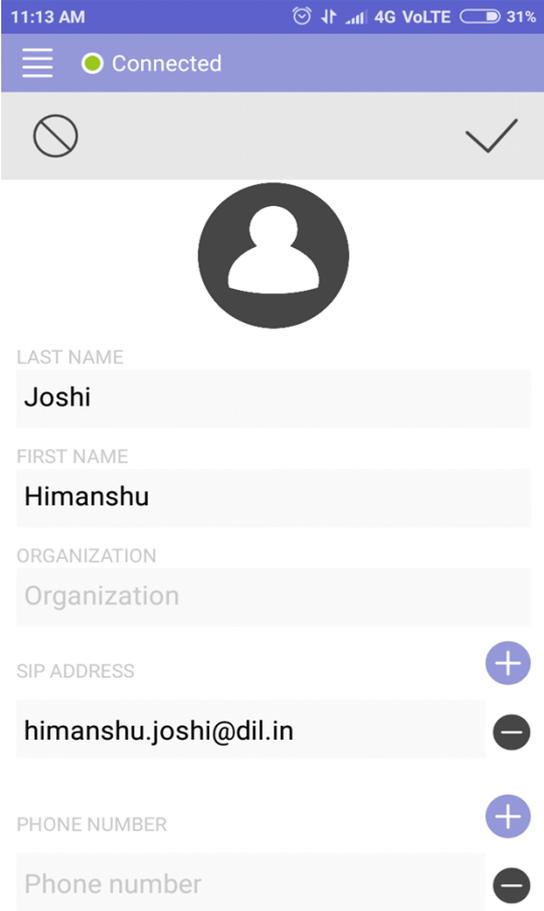


Mahima Jain
sip:mahima.jain@dil.in



How To Add Contact In Xgen Say

- Click on the Add Contact Icon
- Enter the contact details
- Click on Save icon



11:13 AM 4G VoLTE 31%

Connected

⊘ ✓



LAST NAME
Joshi

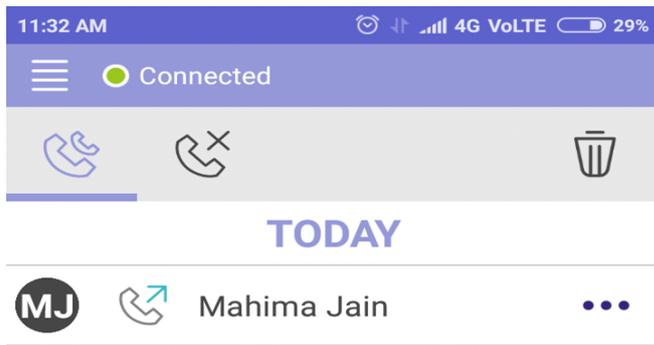
FIRST NAME
Himanshu

ORGANIZATION
Organization

SIP ADDRESS 
himanshu.joshi@dil.in 

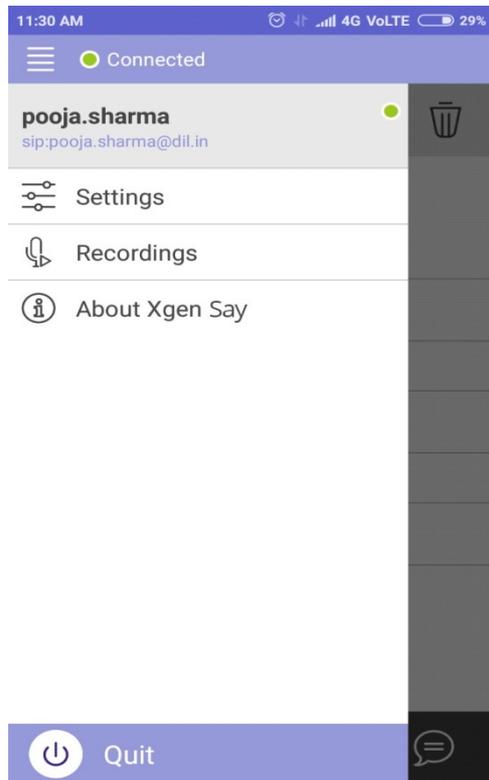
PHONE NUMBER 
Phone number 

Click on The View Call History Icon where user can see all the call details.



How To See Call Recording List In Xgen Say

- Click on the Menu icon
- Select Recording option
- Now user can see all the saved recordings.



Domain Level Feature

1. Domain Cleaner with subject

We have enhanced this feature to make it more convenient for admin to clear emails from the domain. Now if admin defined any keyword in subject and it matches with any word in subject of an email (it should be first word), then that email will be cleaned.

For e.g. In subject admin has defined Sales then it will search all emails with subject test whether it is **Salesdata, Sales1, salesperson**. But if it is **departmentsales, groupsales**, then it will not be removed.

Previously there were restriction to match with exact word in subject, then only that mail would be removed. But due to its enhanced feature, there is no need to define exact subject. You just put any keyword in the subject field and wherever it will be found this keyword in subject, then mail will be cleaned.

The screenshot shows a web interface for 'Domain Cleaner' on the domain 'soft.dil.in'. The breadcrumb trail indicates the user is in the 'Domain Cleaner' section. The search bar contains 'Domain / Email / Mobile'. The main form has the following fields and options:

- Domain: soft.dil.in
- Email Address: vaishali@soft.dil.in
- Subject: test
- Folder: Inbox
- From Date: 15-08-2018
- To Date: 31-08-2018
- Mark as: All (selected), Read, Unread
- Apply Retention Policy: 4 Months
- Delete Mail... button

Process:

1. For this go to server setting or Domain (if you do not have rights of server admin). In domain dropdown, you will get an option domain cleaner.
2. On click of domain cleaner, fill entries in the field like:
 - Domain Name
 - Email Address
 - To-From Dates
 - Subject
 - Select Apply Retention policy if you want to apply it. (Later on, if you want to retrieve it, then you can do that through "Search in Archive" for the defined time period.)
3. Once you will click on submit, it will search email subjects with defined keyword and will delete it.

2. Add/ Delete Alias while creating User

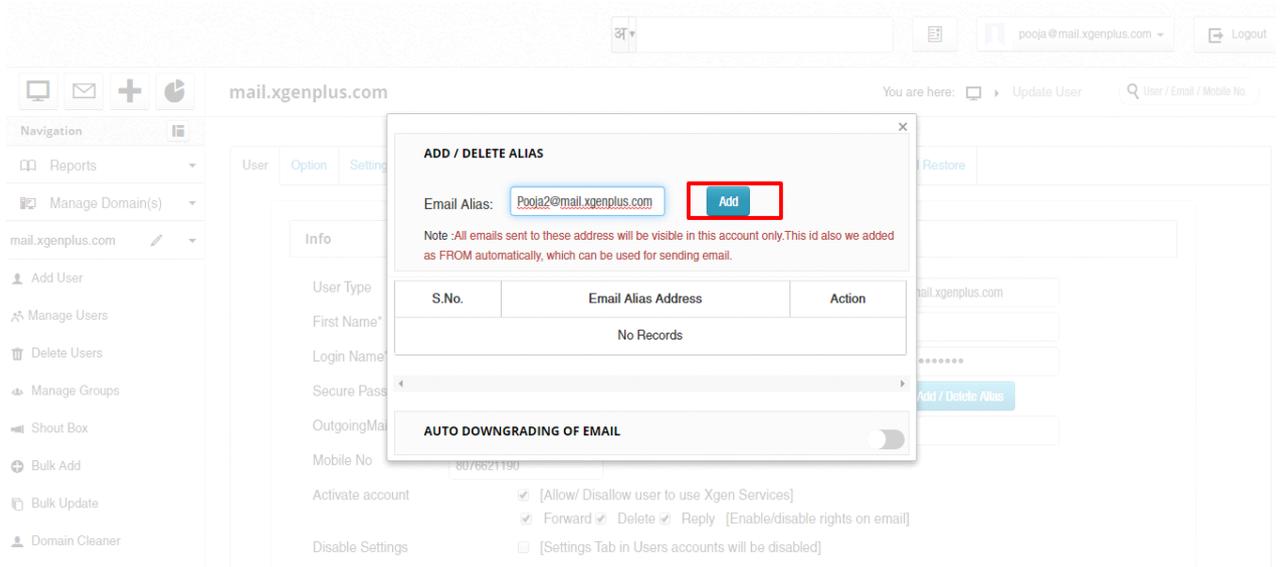
We have enhanced this feature for the Domain Administrator to create the Alias of user's email ID, while creating them itself so that from starting itself, user has alias ID's. Rest User can also create Alias ID's on its own.

Steps:

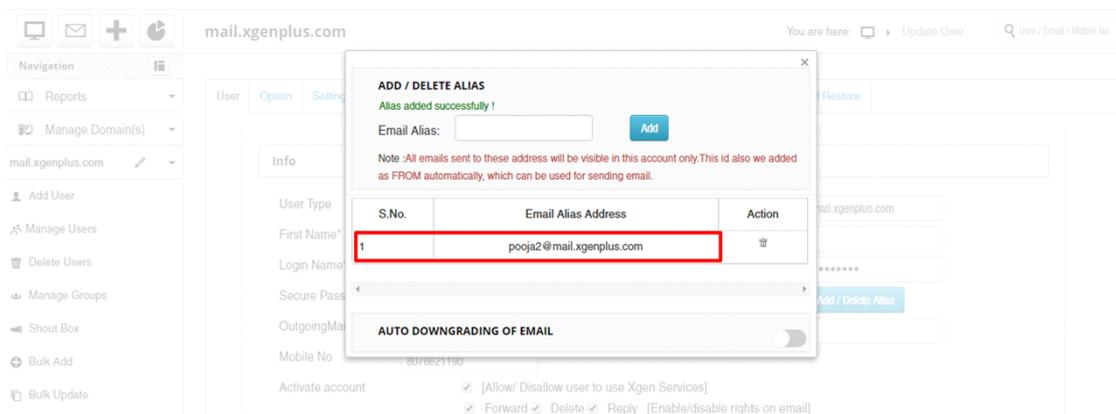
- Domain Admin needs to Login Xgen Admin Account.
- Click on the Manage Users and enter the user whose alias needs to be created.
- Select the Email Alias and Enter Alias Details.

The screenshot shows the Xgen Admin interface. The navigation menu on the left includes 'Manage Users', which is highlighted with a red box. The main content area displays the user management page for 'pooja@mail.xgenplus.com'. The 'Email Alias' field is highlighted with a red box, and the 'Add / Delete Alias' button is also highlighted. The form includes fields for User Type, First Name, Login Name, Secure Password, OutgoingMail ID, Mobile No, Domain Name, Last Name, Password, and Alternate Mail ID. There are also checkboxes for 'Activate account' and 'Disable Settings'.

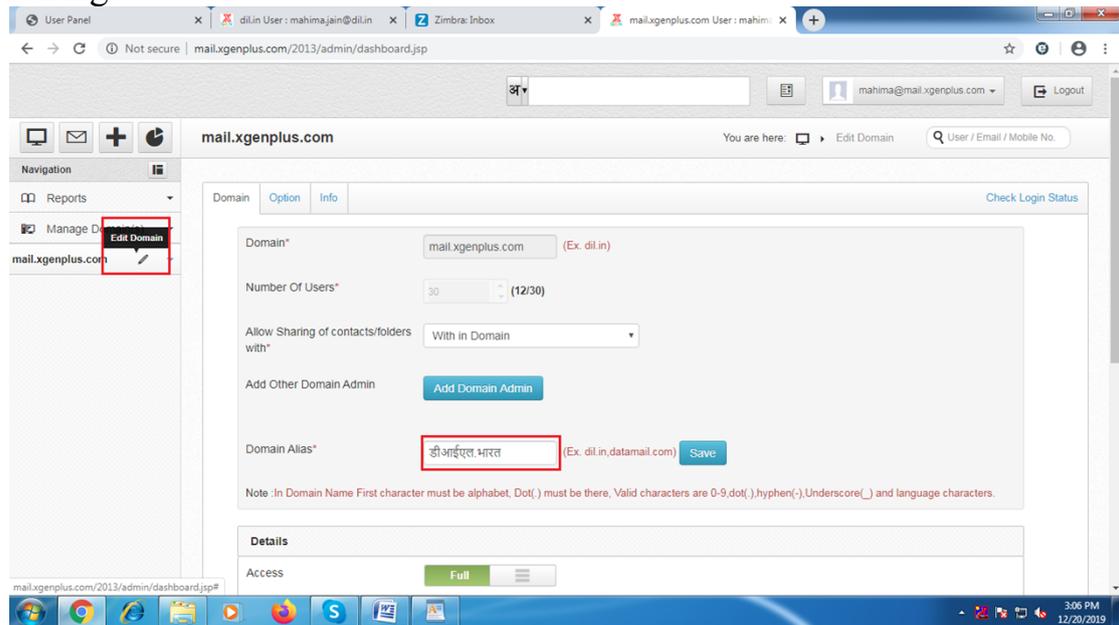
- Enter the Alias name and hit Add.



The alias domain name needs to be prior approved in the domain section. Only those domains which have been assigned / approved for this domain can be used.



For Eg.



I want to create alias of a user named John on domain mail.xgenplus.com. So select “edit domain”.

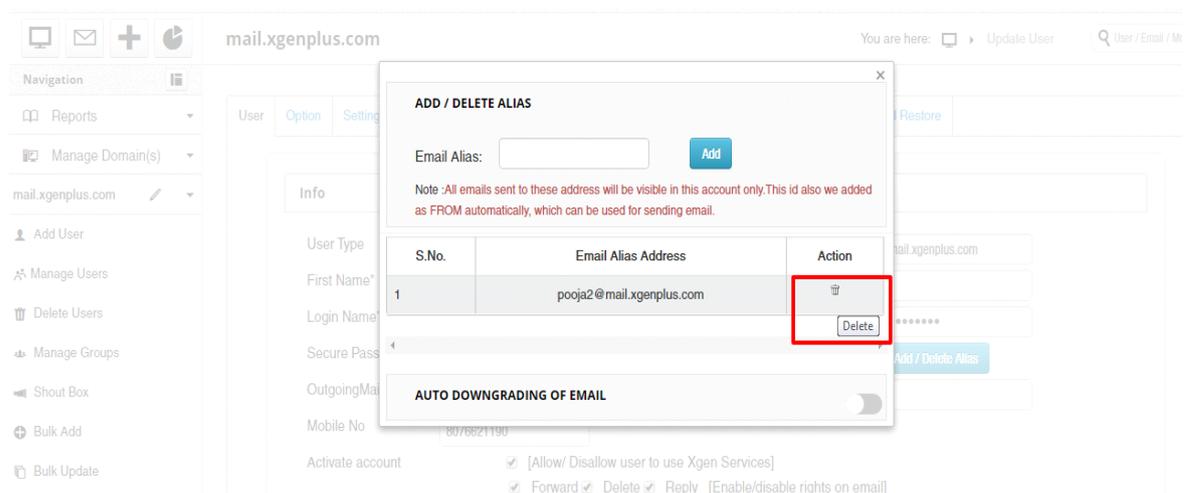
Under Domain Alias watch which all domains are allowed for you to create an alias email ID.

In this case, डीआईएल.भारत is the only domain allowed for which I can create alias of a user.

The Email ID added as alias will be added at user’s front for sending the email. User can select this ID to send mails. Similarly, all emails sent to these address will be visible on the main account only.

How To Delete Alias-

User can delete created alias by clicking on delete icon and the alias will be deleted.



3. Dynamic Groups

If you are a Domain Administrator, you can add users and groups, and assign users to groups, in order to determine their permissions. Groups are, shared by a set of users for a common purpose. When an email is sent to the group account, a copy of email gets delivered to all the individual members of the Group. This email delivery can be controlled by Moderation Settings, Permissions and rules.

Dynamic group has an advantage over regular groups, Unlike regular groups that contain a defined set of members, dynamic groups has distributed list of members added into the groups based on the filters and rules that you define. When an email message is sent to a dynamic group, it's delivered to all recipients in the organization that match the criteria/rules defined for that group. Every time you add a new user having same value to the attributes (as assigned to other users) will authentically add to that dynamic group and the user will also start receiving the email messages, sent in his group which means there is no need to manually add users in the group every time a new user is added.

A dynamic group includes any recipient in Active Directory with attribute values that match its filter.

As your organization's administrator, you can make all users in your organization members of the same group, to easily email everyone without having to enter each person's address. After you create the group, any new users you add to your organization's account are automatically added to the group.

Dynamic Group: Dynamic group is created to auto add users in this group there are pre- defined rules and option that can be configured. Follow below steps to add dynamic group.

- **Step 1:** In the Admin panel, Navigate to Manage Groups > Dynamic Groups

soft.dil.in You are here: Dynamic Groups Domain / Email / Mobile No

Navigation

- Manage Server
- Reports
- Manage Domain(s)
- soft.dil.in
- Add User
- Manage Users
- Delete Users
- Manage Groups**
- Shout Box
- Bulk Add
- Bulk Update
- Domain Cleaner
- Mailing Lists
- Alert/Notice
- Policy
- Service Report
- Add Themes

Internal Groups Public Groups **Dynamic Groups**

Group Name Add

List Of Groups

Search

#	Group Name	Action
1	माईन	
2	हिन्दजी	
3	ACCOUNTS	
4	AW	
5	TEST	
6	VJAY2233	
7	ZABIGROUP	

Showing 1 to 7 of 7 entries

← Previous 1 Next →

Rule(s) List of Group :

Rule(s)

- **Step: 2** To Add a new group you need to write a desirable name of choice which you want to be added in the dynamic group list, once you add the group it will show in the list.

Internal Groups Public Groups Dynamic Groups

DEMOGROUP Add

List Of Groups

Search

#	Group Name	Action
1	माईन	
2	हिन्दजी	
3	ACCOUNTS	
4	ANIL1234	
5	AW	
6	DEMOGROUP	
7	TEST	
8	VJAY2233	
9	ZABIGROUP	

Rule(s) List of Group :

Rule(s)

- **Step 3:** Click on the group in which you want to add users accomplishing the set of rules on the right side.

The following are the supported operators and their syntax for a single expression

- i. Equals
- ii. Not Equals
- iii. And
- iv. Or

The values that you enter for the selected attribute must exactly match those that appear in the recipient's properties. For example, if you enter Madhya Pradesh for ****State****, but the value for the recipient's property is MP, the condition will not be met. Also, text-based values that you specify aren't case-sensitive.

In the sample figure we have added the users based on set of rules i.e 'equals' & 'And' with attributes 'area' and 'department' respectively. This will add the users that appear in the mentioned attributes.

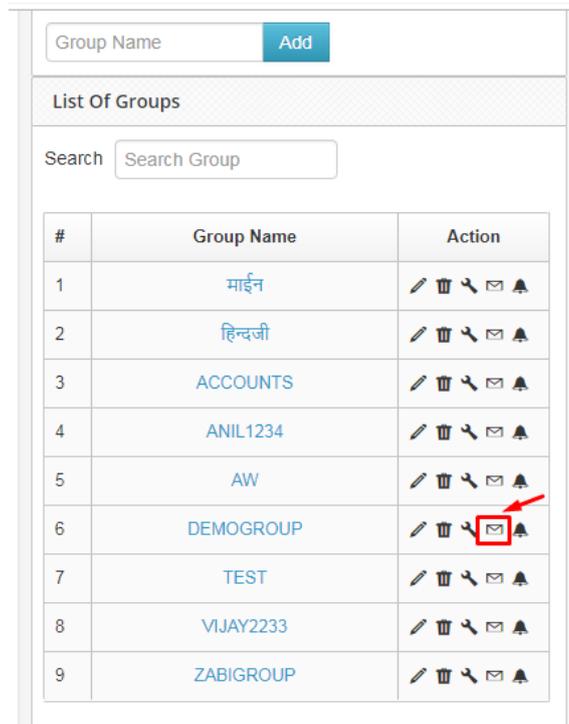
The screenshot displays a user management interface with three tabs: 'Internal Groups', 'Public Groups', and 'Dynamic Groups'. The 'Dynamic Groups' tab is active. On the left, there is a 'List Of Groups' section with a search bar and a table of groups. The table has columns for '#', 'Group Name', and 'Action'. The groups listed are: 1. माईन, 2. हिन्दजी, 3. ACCOUNTS, 4. ANIL1234, 5. AW, 6. DEMOGROUP, 7. TEST, 8. VIJAY2233, and 9. ZABIGROUP. On the right, the 'Rule(s) List of Group :DEMOGROUP' panel is shown. It includes a rule configuration area with a dropdown set to 'and', a 'Select Key' dropdown, a dropdown set to 'equals', and an 'Attribute Value' input field. The rule text 'area is mansarovar and department is qa' is displayed in the input field and is highlighted with a red box and a red arrow. Below the rule list, it shows 'Total User(s) in Group: 1'.

#	Group Name	Action
1	माईन	✍️ 🗑️ 📧 🔔
2	हिन्दजी	✍️ 🗑️ 📧 🔔
3	ACCOUNTS	✍️ 🗑️ 📧 🔔
4	ANIL1234	✍️ 🗑️ 📧 🔔
5	AW	✍️ 🗑️ 📧 🔔
6	DEMOGROUP	✍️ 🗑️ 📧 🔔
7	TEST	✍️ 🗑️ 📧 🔔
8	VIJAY2233	✍️ 🗑️ 📧 🔔
9	ZABIGROUP	✍️ 🗑️ 📧 🔔

Send Email through Dynamic Group:

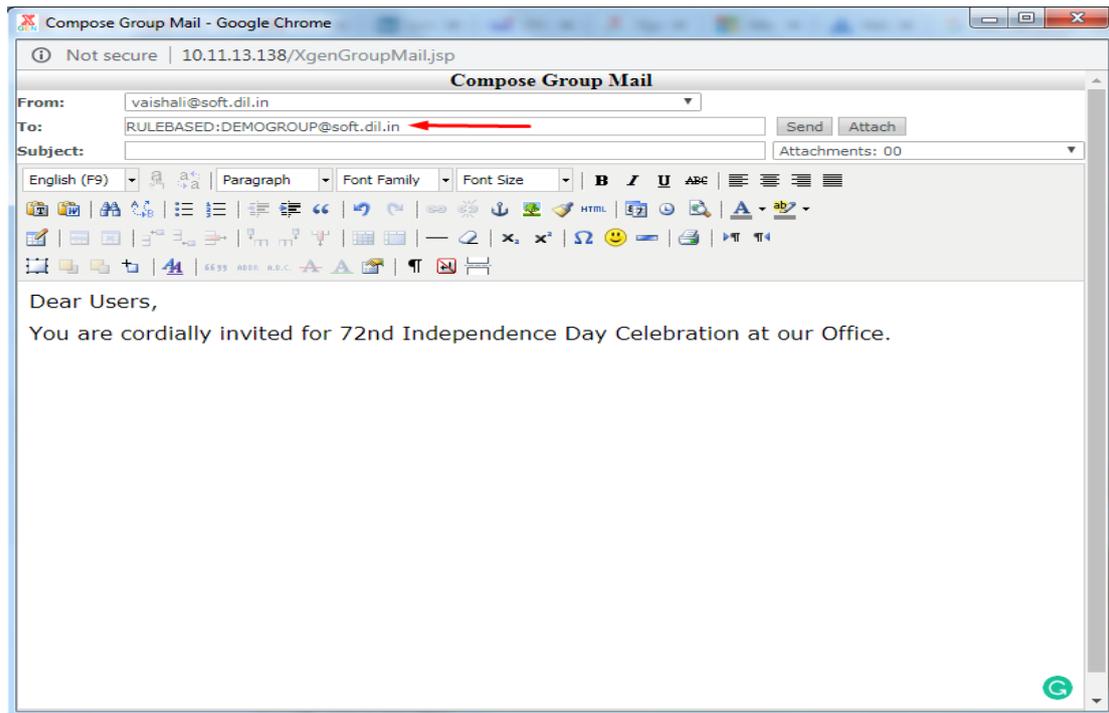
Now, you have created the dynamic group and have added the users into it, let's see how we can send the email messages through dynamic group?

Click 'mail' icon beside the group name and it will redirect to the 'Compose Group Mail' window.

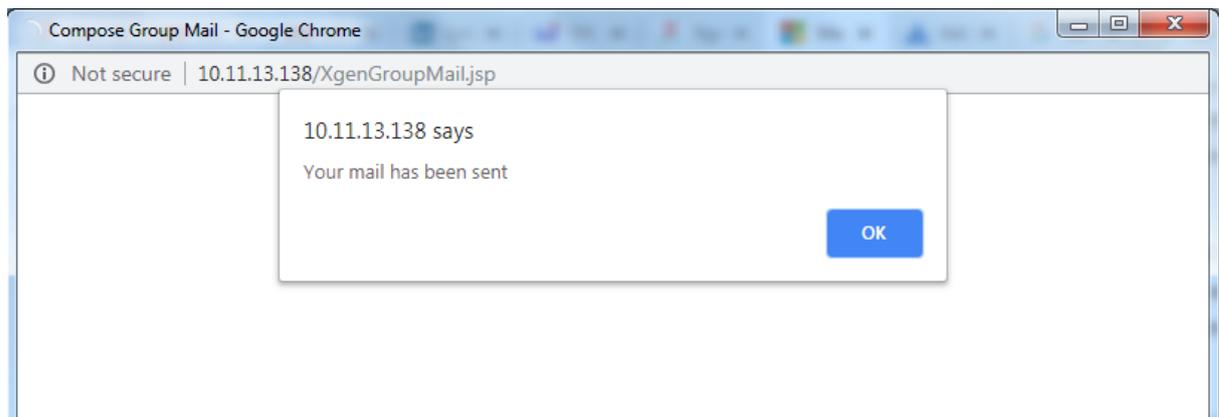


#	Group Name	Action
1	माईन	✎ 🗑️ 📧 📧 🔔
2	हिन्दजी	✎ 🗑️ 📧 📧 🔔
3	ACCOUNTS	✎ 🗑️ 📧 📧 🔔
4	ANIL1234	✎ 🗑️ 📧 📧 🔔
5	AW	✎ 🗑️ 📧 📧 🔔
6	DEMOGROUP	✎ 🗑️ 📧 📧 🔔
7	TEST	✎ 🗑️ 📧 📧 🔔
8	VIJAY2233	✎ 🗑️ 📧 📧 🔔
9	ZABIGROUP	✎ 🗑️ 📧 📧 🔔

The group name appears in the shared address book, on the To: line when email is sent to this group



Once you send the mail, you will receive the confirmation about the successful mail delivery



4. Permit Lead Management

To allow user to use lead management feature the domain admin has to allow with the feature.

Domain Admin search the User.

Under Option settings allow the User to “Enable Lead”.

Mobile Service			
<input type="checkbox"/> YES	Enable Contact Sync	<input type="checkbox"/> YES	Enable Calendar Sync
<input type="checkbox"/> No	Enable Call Recording	<input type="checkbox"/> YES	Enable Lead

Also, if the Sales Manager has to view the progress of his team members, domain admin has to give the permission for the same. Let’s say Mahima wants to keep record for John, vikram then mahima should have ability to view their leads.

Domain Admin search the User.

Under User settings select Default Settings.

Select Enable Tracking.

Select Share data location with. Here give the name of the person who wants to track.(Here mahima’s mail ID).

<input type="checkbox"/> Yes	Enable Tracking
<input checked="" type="checkbox"/>	Capture Location Data from mobile app in every <input type="text" value="30"/> minutes From <input type="text" value="09:00 AM"/> To <input type="text" value="06:00 PM"/>
<input checked="" type="checkbox"/>	Enable Mark Attendance Module in Mobile APP
<input type="checkbox"/> Yes	Share Location Data With <input type="text" value="mahim@mail.xgenplus.com"/>
<input type="button" value="View / Update Changes"/>	

Server Level Feature

Lead management

Server Admin can set the options available for user to create Leads.

Server Admin will fill in:

The screenshot shows the 'Server' management interface. The left sidebar contains navigation options like 'Manage Server', 'Add Domains', 'Manage Groups', 'Search', 'Shout Box', 'Add Resource Type', 'Add Resource', 'Alerts/Notices', 'SpamJadoo Settings', 'Services', 'Add Themes', 'Server Settings', 'Manage Gateway', and 'SMS Gateway'. The main content area is titled 'Lead Services Type' and includes a form to add a new service type with a 'Service Type*' field and a 'Save' button. Below the form is a table listing existing service types.

ID	Service Type	Date	Actions
1	HOT	02-11-2019	
2	COLD	02-11-2019	
3	WARM	02-11-2019	

Showing 1 to 3 of 3 entries

< Previous 1 Next >

The screenshot shows the 'Lead Services' configuration page. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Lead Services' and includes a form to add a new service with a 'Service Name*' field and a 'Save' button. Below the form is a table listing existing services.

ID	Service Name	Date	Actions
1	XGEN IM	09-11-2019	
2	XGEN SAY	09-11-2019	
3	INTERNET BANDWIDTH	10-12-2019	
4	BROADBAND	10-12-2019	
5	SOFTWARE DEVELOPMENT	10-12-2019	
6	MOBILE APP DEVELOPMENT	10-12-2019	
7	WEB DEVELOPMENT	10-12-2019	
8	HOSTED EMAIL	10-12-2019	
9	XGEN SOFTWARE	10-12-2019	
10	SPAMJADOO SOFTWARE	10-12-2019	

Showing 1 to 10 of 13 entries

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