

# Unit 4

# Software As a Service

# Agenda

- Email communication in the cloud using AWS WorkMail
- CRM as a service (Streak)
- Task Management –(Calendar & Scheduler)
- Document services
- Spread sheets and databases
- Social computing Service

G Suite

# If there is a job to be done !!!!!

- Chances are, there's a SaaS application to help.
- Email, Project management, CRM, Content marketing, Cold calling
- You can find numerous free applications promising to save time and resources
- You want to create email accounts for all your employees with a particular domain – [Workmail](#), [Gsuite](#)
- Manage your tasks and events - [alexa](#)
- Design without a professional designer – [stencil](#) or [canva](#)
- Scheduling social media posts in advance – [buffer](#)

- Connecting quickly via video chat, using one link – [Appear.in](#)
- Monitor and manage projects with customizable project stages - [Trello](#)
- Collect your visitors' email addresses – [sumo](#)
- Send newsletters and automated mailing campaigns to your subscribers – [Mailchimp](#)
- Create your own, publicly available website, with simple drag and drop editor – [WIX](#)
- Manage your leads/contacts/marketing in one place – [Hubspot CRM](#)

# Software as a Service

- IaaS- Computing as a Service
- PaaS- Application Development Platforms
- SaaS -Generic applications can be created as a service
- Users use the applications directly without installing any software in their system
- Applications execute in the browser.
- Youtube, gmail, google docs, facebook,
- The software will be available for multiple platforms and can be used any of the user devices

# Traditional vs SaaS

Traditional Packaged Software	Software as a service
Build your own	Plugin, subscribe & pay per use
Designed for customers to install, manage and maintain	Designed from the outside and set up for delivery as Internet-based services
Architect solutions to be run by an individual company in a dedicated instantiation of the software	Designed to run thousands of different customers on a single code
Infrequent, major upgrades every 18-24 months, sold individually to each installed base customer	Frequent, "digestible" upgrades every 3-6 months to minimize customer disruption and enhance satisfaction.

-contd...

Traditional Packaged Software	Software as a service
Version control, upgrade fee	Fixing a problem for one customer fixes it for everyone
Streamlined, repeatable functionality via Web services, open APIs and standard connectors	May use open APIs and Web services to facilitate integration, but each customer must typically pay for one-off integration work.

# Advantages of SaaS

- Application available for short time, then pay per use
- Some applications are customizable, then payment can be for the features use
- It helps software not to be pirated
- Newer versions can be delivered easily
- Hence, lowers support cost
- The application vendor also gets a wide insight about the customer behaviour and their requirements
- SaaS has expanded the cloud wider.

# Disadvantages

- Security Issues
- Data is stored by vendor of software
- Some applications are not offered through SaaS
- Must have a strong internet connection (fast and reliable)
- Customization

# The Cloud Spectrum



Experts on the Business of Cloud Computing  
Mr. Tamal Dey

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# What kind of Applications as SaaS?

- Enterprise Software Application
- Single-User software application
- Infrastructure software
- Embedded Software

# Enterprise Software Application

- Perform business functions
- Organize internal and external information
- Share data among internal and external users
- The most standard type of software applicable to SaaS model
- Example:
  - Salesforce.com CRM application
  - Siebel On-demand application

## -contd. Single-User software application

- Organize personal information
- Run on users' own local computer
- Serve only one user at a time
- Inapplicable to SaaS model
  - Data security issue
  - Network performance issue
- Example: Microsoft office suite

## -contd. Infrastructure software

- Serve as the foundation for most other enterprise software application
- Inapplicable to SaaS model
  - Installation locally is required
  - Form the basis to run other application
- Example: Window XP, Oracle database

## -contd. Embedded Software

- Software component for embedded system
- Support the functionality of the hardware device
- Inapplicable to SaaS model
  - Embedded software and hardware is combined together and is inseparable
- Example: software embedded in ATM machines, cell phones, routers, medical equipment, etc

# Email CaaS - Features

- Secure
- Managed
- Accessibility
- Availability
- Cost efficient

AWS – Service for Email – WorkMail

Google Apps – Service for Email – Google Apps for Work

# SaaS

## Streak

By: Tamal Dey,  
MCA, PESU

# Getting Started

**Streak** lets you **organize your emails, manage and prioritize your work, and collaborate with your team**, all within Gmail.

Streak is a **fully embedded** workflow (**CRM**) and productivity software in Gmail, and empowers you to **manage all your work right in your inbox**.

Streak often replaces entire CRMs, and also provides a suite of **email power tools** like email-tracking.

# Who Uses Tracking?

## Sales

Receive a notification when your proposal is viewed, and you'll know exactly when to follow up. Know if your email is read and not responded to, or never reaches the recipient.

## Support

Know if your support message has resolved an issue or if the contact hasn't yet read your helpful message.

## Fundraising

You're trying to get legal documents in order - is your investor forgetting to follow through or do they simply need more time?

## Streak Features and Benefits Integrated With Email Sidebar

**View Chart:** Streak creates a visual of the history of your message views so you can understand what's happening at a glance.

**Exact View Times:** Access a full list of every time (and device type) the message has been read.

**Mapping:** Know which city your recipient has viewed your message from.

## Sort By Response

**Recently Viewed:** Sort your email not by when you sent it, but when it was viewed. Streak helps you see which messages are generating a response.

**Awaiting Replies:** See all the messages that need follow up in one location.

**Integrated With Search:** Use the syntax "has:tracking" to search your inbox for specific messages.

# Streak Features and Benefits

## **Viewable From Inbox**

**Real Time Notifications** : Receive a notification every time a recipient views your message.

**Always Accessible:** Anywhere you can view an email, also view the tracking status.

**Snapshot View:** Mousing over the Tracking icon in the inbox will display the total number of views.

## **To Use**

### **Easy Remembers Preference**

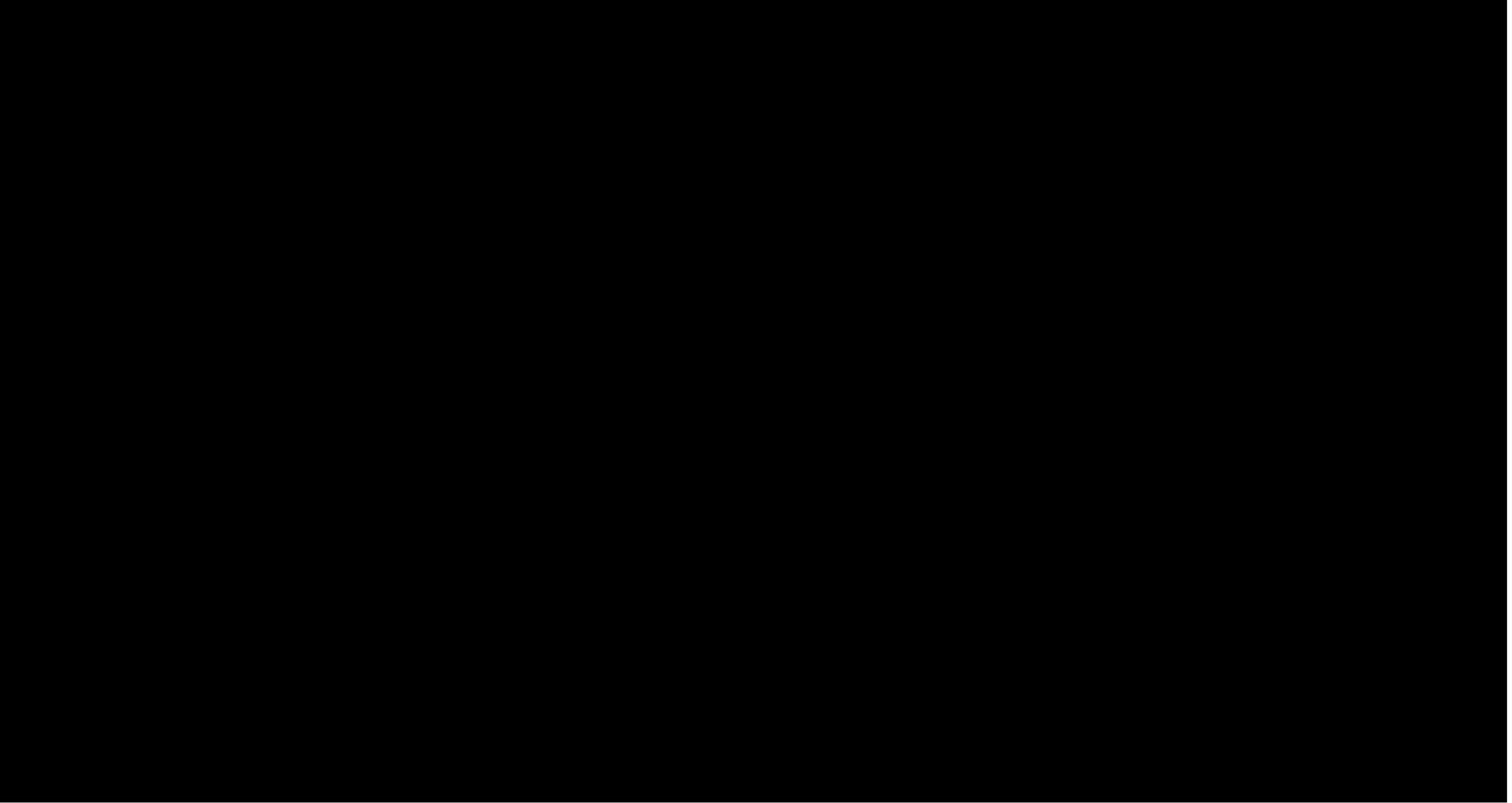
Turn Tracking On (or Off) via your settings so email is automatically Tracked. Streak will remember your preference so you don't have to.

### **Single Toggle in 'Compose'**

If necessary, Tracking is a 1-click toggle in the 'compose' window.

# What is Streak?

(Part 1 Organize your emails)



# What are Streak's Email Power Tools?

Streak provides a range of tools to let you work faster and smarter in Gmail.

**Email Tracking** - Know instantly when someone sees your message

**Mail Merge** - Send personalized mass emails

**Snippets** - Build a shared library of commonly written emails

**Thread Splitter** - Split conversations when topics branch

Our email power tools are best used with our **workflow management and CRM functionalities**.

# Pipelines, Columns, Stages

**Pipelines** are the foundational layer of Streak. They present your data in a spreadsheet view.

Unlimited for private pipeline and 50 max for shared pipeline

Each row in a pipeline represents a **box**.

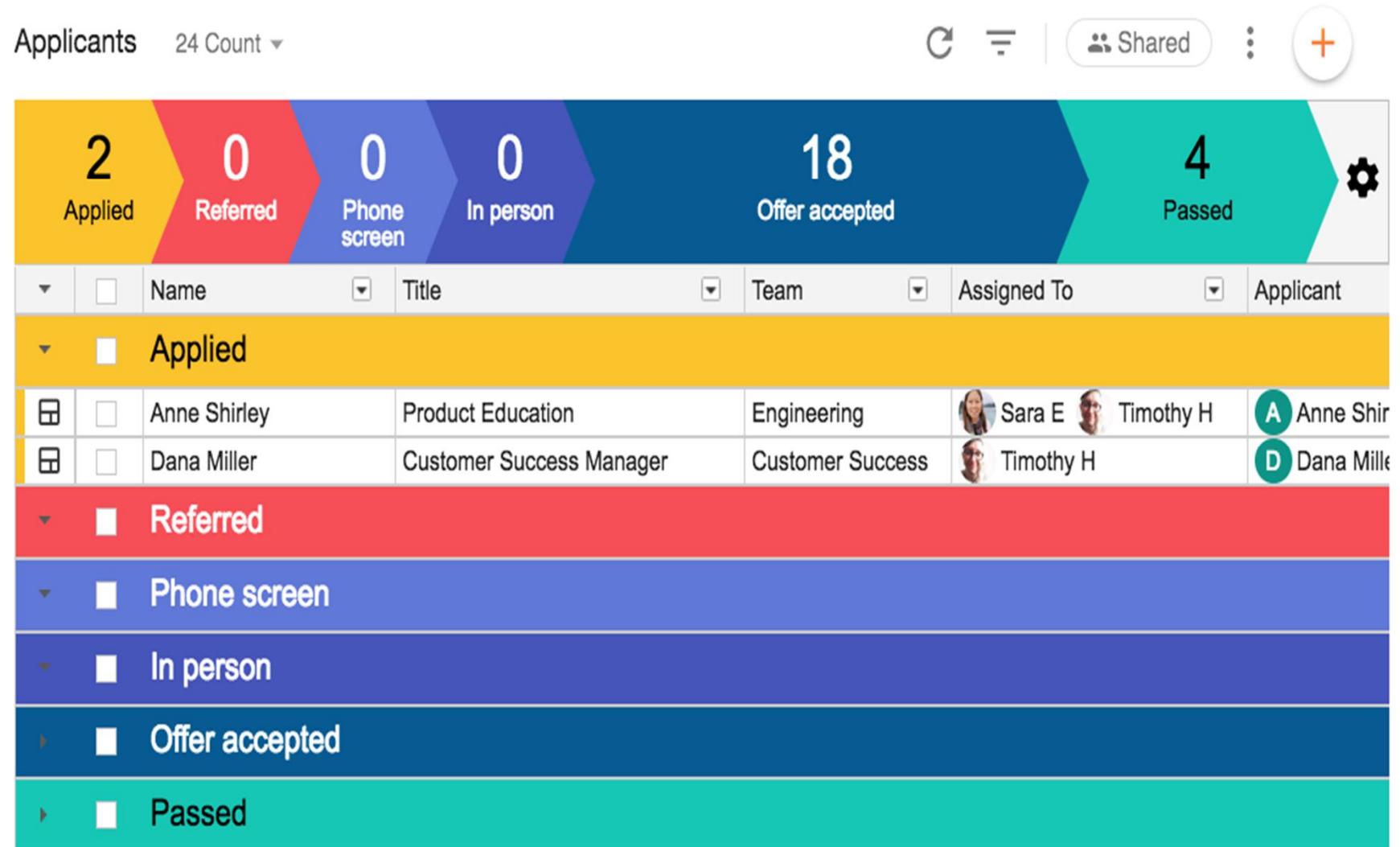
*Boxes are flexible:* they can represent leads, opportunities, accounts, candidates etc., depending on what you're trying to manage.

The first step to using Streak is to **add boxes!**

**Columns** specify what data is stored in a box. You can add as many of your own custom columns, or magic columns to your pipeline.

**Stages** define a box's progress through a pipeline.

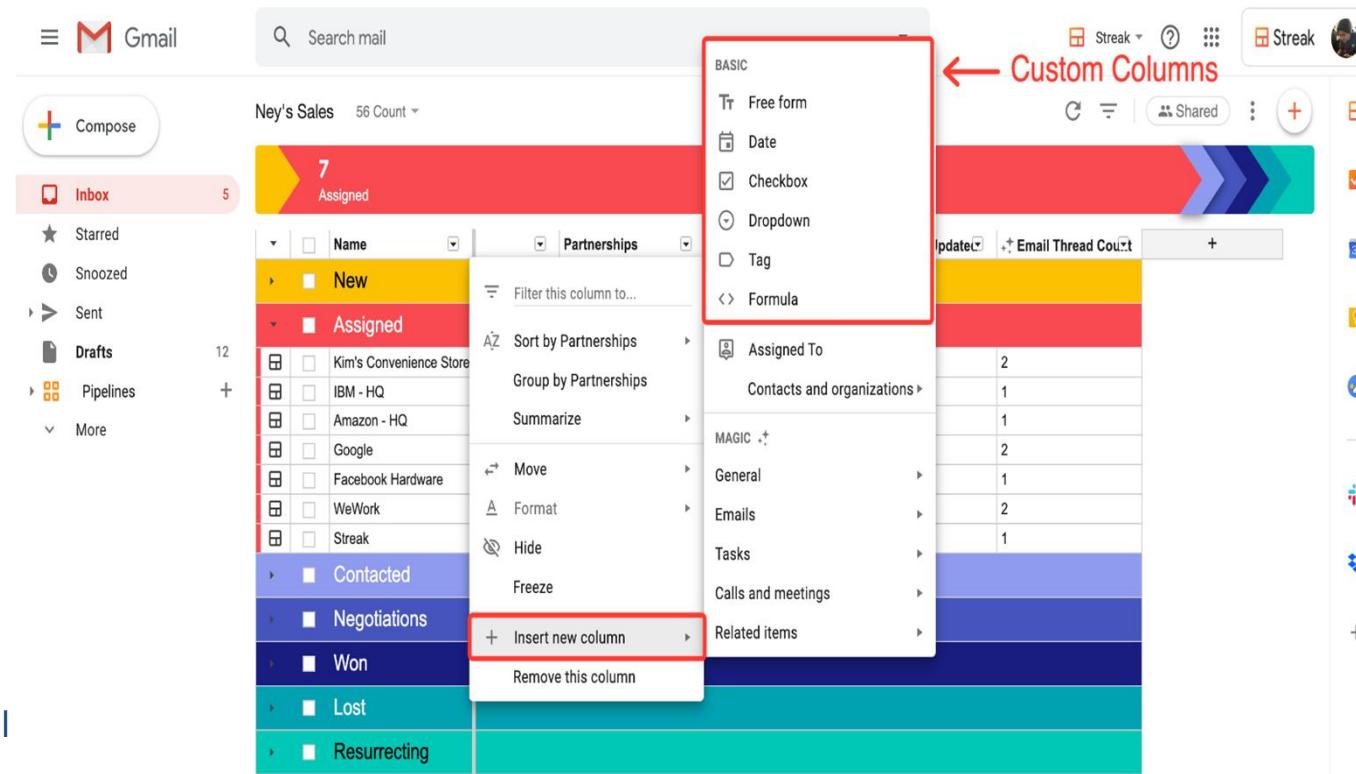
# Pipeline



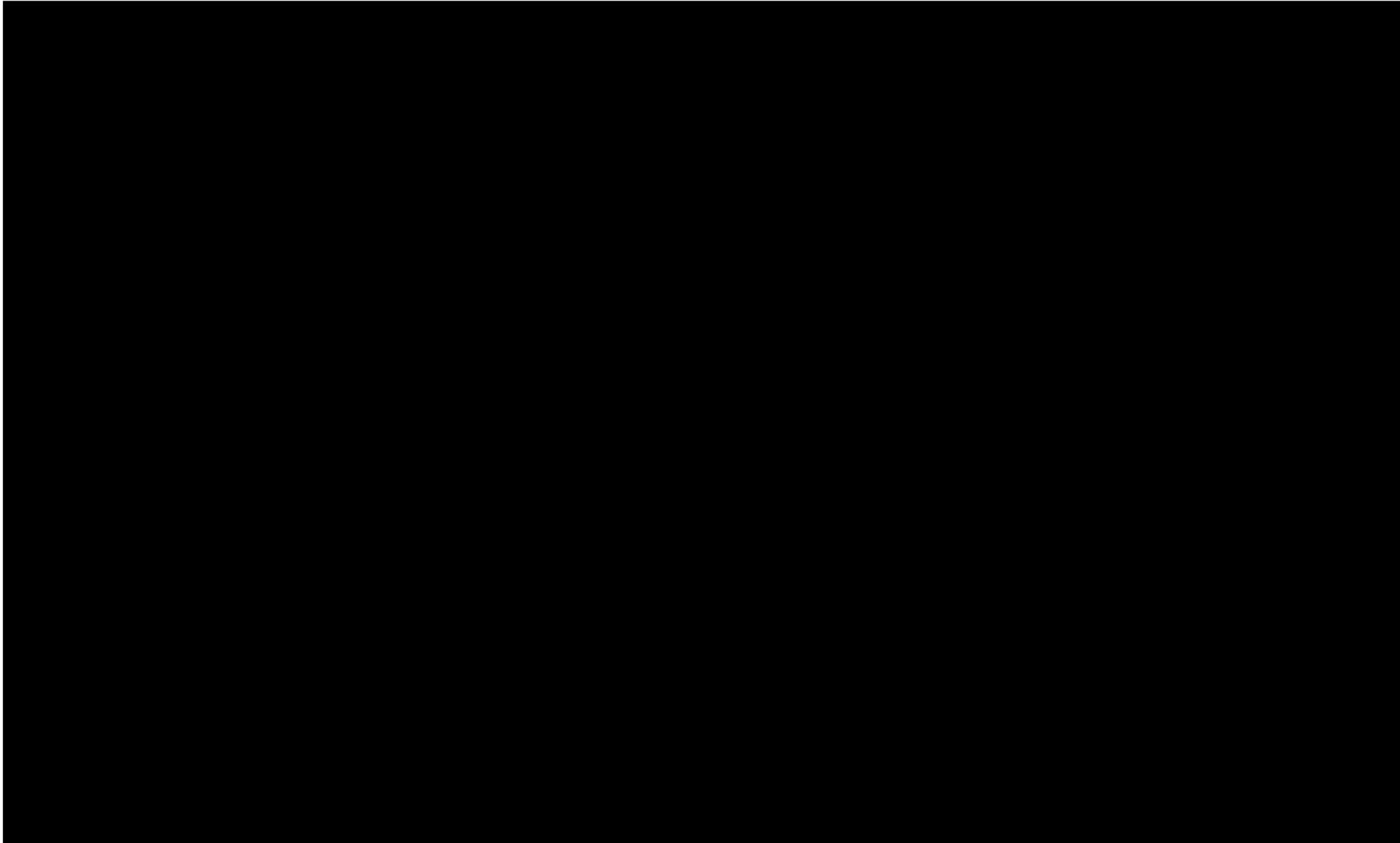
**Custom Columns** are "basic" fields that allow you to organize and **record any kind of information** you want about what you're tracking.

## Adding Custom Columns

Create a new Column through the **+ button** at the top right of the Pipeline, or right-clicking on any existing Column header and selecting **Insert Column** from the menu.



# What is Streak? (Part 2 - Prioritize your work)



# Magic Columns

**Magic Columns** are fields with data that **Streak automatically records for you**. When you add a Magic Column, every Box in that Pipeline will inherit that field.

These fields will also then show up in your sidebar

Magic Column data is system data that cannot be edited.

If you remove a Magic Column you will not lose the data stored in it.

## Adding Magic Columns

Create a new Column through the **+ button** at the top right of the Pipeline, or right-clicking on any existing Column header and selecting **Insert Column** from the menu.

The screenshot shows the Streak app interface for managing sales pipelines. A context menu is open over a pipeline item labeled "Assigned". The menu includes options for "BASIC" and "MAGIC" columns.

**BASIC**

- Free form
- Date
- Checkbox
- Dropdown
- Tag
- Formula
- Assigned To
- Contacts and organizations

**MAGIC**

- General
- Emails
- Tasks
- Calls and meetings
- Related items

A red box highlights the "Insert new column" option under the MAGIC section. A red arrow points from the text "Magic Columns" to the "General" option in the MAGIC list.

Category	Sub-Category	Count
Update	Email Thread Count	+
		31
		1
		1
		2
		1
		1
		1
		2
		1

# #1. Set up your pipeline

A **pipeline** represents the **workflow** you are managing. This could be Sales, Business Development, Projects, Hiring, Recruiting, Investing, Fundraising, or *any other workflow* you might have.

**Customize stages and columns to what you need**

Each **stage** is a step in your workflow. Stages represent the progression from start to finish. Have as many or as few stages as you like!

Each **column** represents the different fields of information you want to record about your boxes. (Streak automatically populates some for you!) Add and remove as many columns!

162  
Lead5  
Contacted8  
Proposal7  
Shipping2  
Closed - Lost10  
Closed Won [...]6  
Nurturing0  
Lost

Name	Contacts and organization	Country	City	State	Deal Size	Com.
<b>Contacted</b>						
<b>Crocus Coffee Bar</b> Lani Kumar United States Napa California \$500.00 \$75.0						
<b>Proposal</b>						
Lavender Coffee	Andrew S Mexico Mexico City \$2,400.00 \$360.					
Rosemallows Tea	Franklin Feeney United States Oakland California \$4,500.00 \$675.					
Alyssum Tea	Lexi-May Lu Mexico Napa \$1,200.00 \$180.					
Zinnia Tea	Elliot H Mexico Mexico City \$2,400.00 \$360.					
Dahlia Coffee & Tea	Tatiana Cortez United States Houston Texas \$250.00 \$37.5					
Bellflower Tea	Drew Spitzer United States Oakland California \$500.00 \$75.0					
Buttercup Coffee - 2020	Justine Delgadillo  United States San Francisco California \$2,400.00 \$360.					
Let's Connect	Drew Spitzer \$2,400.00 \$360.					
<b>Shipping</b>						
Rose Coffee & Tea	Franklin Feeney  L \$500.00 \$75.0					
Jasmine Bar	Linzi Howarth \$2,400.00 \$360.					
Anemone Tea	Hoang Nguyen \$2,400.00 \$360.					
Daffodil Coffee Emporium	Adi R \$4,500.00 \$675.					

# Step 1: Creating Your Pipeline in Streak

Go to stream.com and add streak extension in Chrome/Safari browser (Latest)

Click on  Pipelines + New Symbol in left panel

Choose Sales

Rename Your Sales Pipeline and choose Visibility

Coloured Ribbons- Stages->

Add New Stage + , Delete a Stage or Rename a stages,

Drag and Drop stages and rearrange, Change Color Schemes

Add emails to the stages

Add a column to track

Create a new column from drop down column and add free from

Select checkbox for tsk completion and add tags

## Add Magic Column from drop down

Fetch key pieces of data (Date of last email), (Date in Stages)

## #2. Organize your emails, starting with boxes

### **Add boxes**

Quick Add is one of several ways to add boxes to your pipeline.

Each box is a row in your pipeline, and represents what you're trying to track in your pipeline. In many cases these are companies or individuals.

# Adding Boxes

The screenshot shows the Gmail inbox with a focus on the 'Hiring' pipeline. The pipeline consists of six stages: Resume, Phone Screen, Interview, Internal Deci..., Offer Negotia..., Hired, and Pas... (partially visible). Each stage has a count of 0. To the right, a sidebar titled 'STREAK Quick add' is open, displaying sections for 'Contacts' and 'Companies'. The 'Contacts' section lists several individuals with their names and email addresses. The 'Companies' section lists several companies with their names and websites. A central illustration of a person meditating is positioned between the inbox and the sidebar.

Hiring 0 Count ▾

0 Resume 0 Phone Screen 0 Interview 0 Internal Deci... 0 Offer Negotia... 0 Hired 0 Pas...

Get started by quick adding from the sidepanel

click on any company or contact

[Import](#) [Intro to pipelines](#)

STREAK Quick add

Find companies or contacts

Contacts

- angela@roadsidedentalmarketin...
- Alvin Phun • alvin.p@roserocket...
- Daisy Parker • ms.daisyparker89...
- Ryan Sandoval • ryansandoval@...
- Katelyn Larson • katelyn@skylin...
- Jo Bradney • info@galleriafresco...
- Manuel Guadarrama • mguadarr...
- Paulo Souza • sopaulo@google...
- Grace Cohen • grace@silvonhom...

[View all \(+490\)](#)

Companies

- Roadside Dental Marketing • roa...
- Rose Rocket • roserocket.com
- Google • google.com
- Skyline Music • skylineonline.com
- galleriafresco.com
- Smart IT • smartitcompany.es
- Silvon • silvonhome.com
- barbaramontesanto.com

## What is a box?

A box is an item that you move through your pipeline - it could be a sales lead, a candidate's job application, a support ticket, an investor, or anything else you'd like to track.

Each row in a pipeline opens into a detailed box **view**, where you can **track emails, files, contacts, details, and communication** related to your box.

## Step 2: Creating & Managing Boxes in Streak

Add a new Stage -> Box element under Stages

- Add contact details and more information

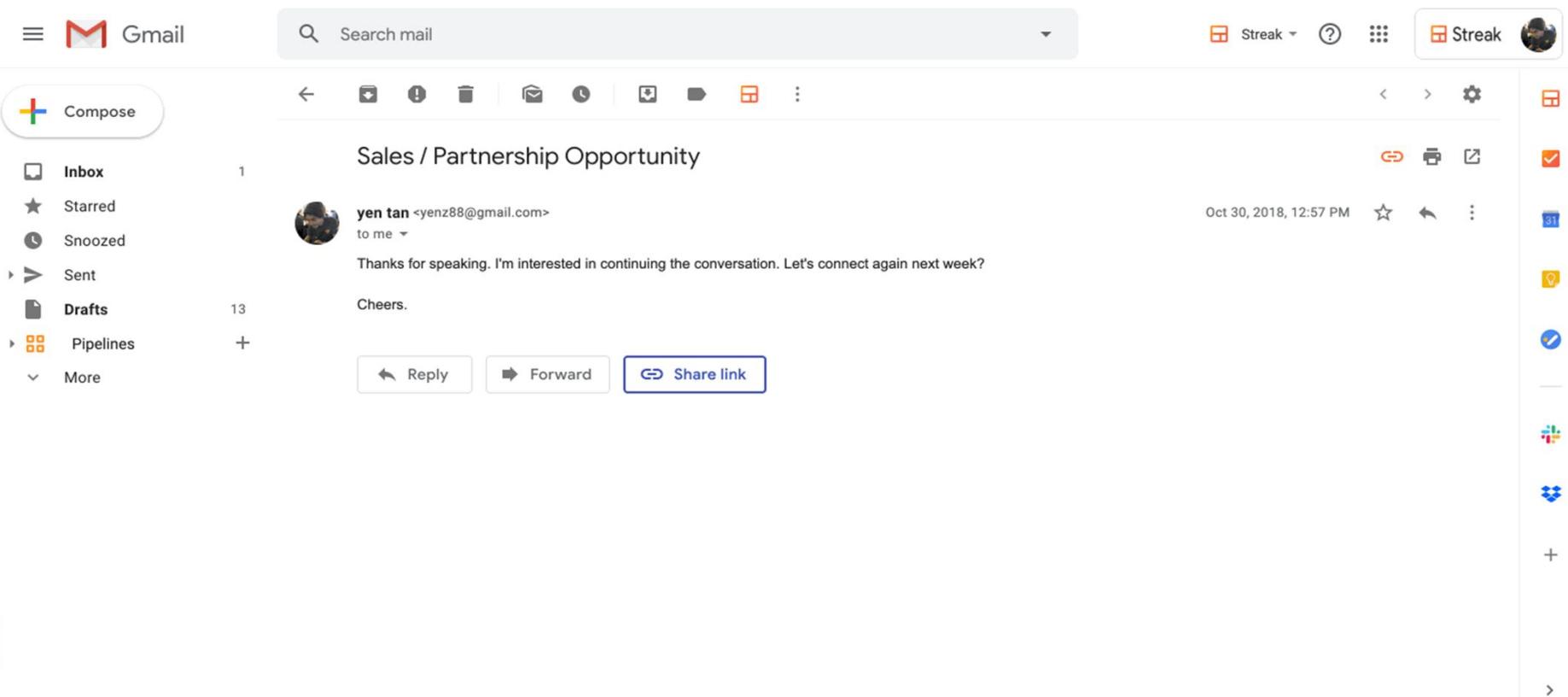
- Add information for Data Enrichment

Add the boxes from mail and inside stages

Move the Contacts emails either single or mass move

**Organize your emails through the sidebar  
Add your emails to existing boxes, OR create new boxes  
for them**

After an email is added to a Box (new or existing), you can now access Box details through the sidebar. You'll also be able to see this email in that Box.



## #3. Enrich and collaborate

Within **each of your boxes**, you could:

- Add and view emails (including any email your team adds!)

- Add comments and meeting notes (shared with your entire team)

- Collaborate and tag team members (we'll notify them when you @mention them)

- Add contacts (we'll automatically enrich them with publicly available data)

- Assign tasks (we'll notify them when assigned)

- Upload files

Gmail Search mail

Ney's Sales > Streak Product Team

Add comment Stage Assigned To

Contacted Yen T

Inbox 5

All Emails Files Comments

Call CFO for project 2mos ago

Streak update

See all tasks: 2 Overdue | 2 Completed

Yen T, Jasen K completed: ✓ Align team for proj... 2mos ago

Yen T added a contact (Yen T) 2mos ago

2 files uploaded by Yen T 2mos ago

Streak Mail - ... results-20180...

Yen T removed a Meeting 2mos ago

Call Log on 11/12/18 2mos ago

Yen T

Great call with Aleem. He's supportive of the trial. Some concerns around compatibility on their software stack but nothing beyond that. Met CTO for first time...

Yen T 2mos ago

Met with Aleem today - seems like a great guy! Streak is promising Let's discuss @Jasen 2mos ago

Sounds good. I like him too. Let's connect with @Yvonne to sync up. 2mos ago

Reply

Follow

Stage

Assigned To

Priority Medium Source Website

Deal size \$150,000 Probability 20%

Last Call Sep 13, 2018 Location London

Interested In General Learning More Contacts Orgs

Custom Columns

Contacts and Organizations

Aleem Mawani CEO, aleem@streak.com

Eric Schmidt Technical Writer 3, eric@google.com

Omar Ismail CTO, omar@streak.com

Yen Tan Growth, yen@streak.com

Google google.com

streak.com

ADD EMAIL CONTACTS

Notes

## Step 3: Utilizing the Box View

Single Contact View in detail tracking

Box View

Send an intimation to the team mates

Create and Assign a task to any member

Streak Upcoming

# What else should I do?

**If you have completed steps #1 - 3 ,!** You're set up for success. Streak has **a lot more** to offer:

**Email power tools.** Email tracking, mail merge, snippets, and send-later.

**magic columns.** We automatically capture lots of data (e.g. date of last email, number of emails, days in stage etc.) for you to organize and prioritize your pipeline.

**Saved views.** Filter, sort and group your pipeline to tell you which boxes need attention, what to work on next, and even to analyze your data!

**Add your team.** Start collaborating with others: share anything you want: your emails, contacts, Boxes, and Pipelines.

**Tasks.** Create and assign flexible tasks to yourself or your team.

**Mobile.** If you're someone on-the-go, download our **iOS and Android apps!**

# Reference

1. <https://support.streak.com/en/articles/2624039-getting-started>
2. [https://docs.google.com/document/d/1tIdg0PcZavq2OuMZ1hRI4sjIVtm3u1FsTFC4pne\\_pE/edit](https://docs.google.com/document/d/1tIdg0PcZavq2OuMZ1hRI4sjIVtm3u1FsTFC4pne_pE/edit)
3. <https://www.youtube.com/watch?v=N2rdXnxMXxU>
4. <https://www.youtube.com/watch?v=EKvJhQNgpXk>
5. <https://youtu.be/qC39fAY2amo>
6. Step 1: Creating Your Pipeline in Streak  
[https://www.youtube.com/watch?v=7INX\\_KSuzMg](https://www.youtube.com/watch?v=7INX_KSuzMg)
7. Step 2: Creating & Managing Boxes in Streak  
<https://www.youtube.com/watch?v=QTTAB8R2QpA>
  - Create a new lead from your pipeline
  - Create a new lead from an email thread
  - Create a new lead through a google sheet import
8. Step 3: Utilizing the Box View  
<https://www.youtube.com/watch?v=vCG4ACZBtN0>

# SaaS Business Applications



By: Tamal Dey,  
MCA, PESU

# Introduction

Amazon WorkMail is a secure, managed business email and calendar service with support for existing desktop and mobile email client applications.

Amazon WorkMail gives users the ability to seamlessly access their email, contacts, and calendars using the client application of their choice, for

Microsoft Outlook

native iOS

Android email applications

Using any client application supporting the IMAP protocol, or directly through a web browser.

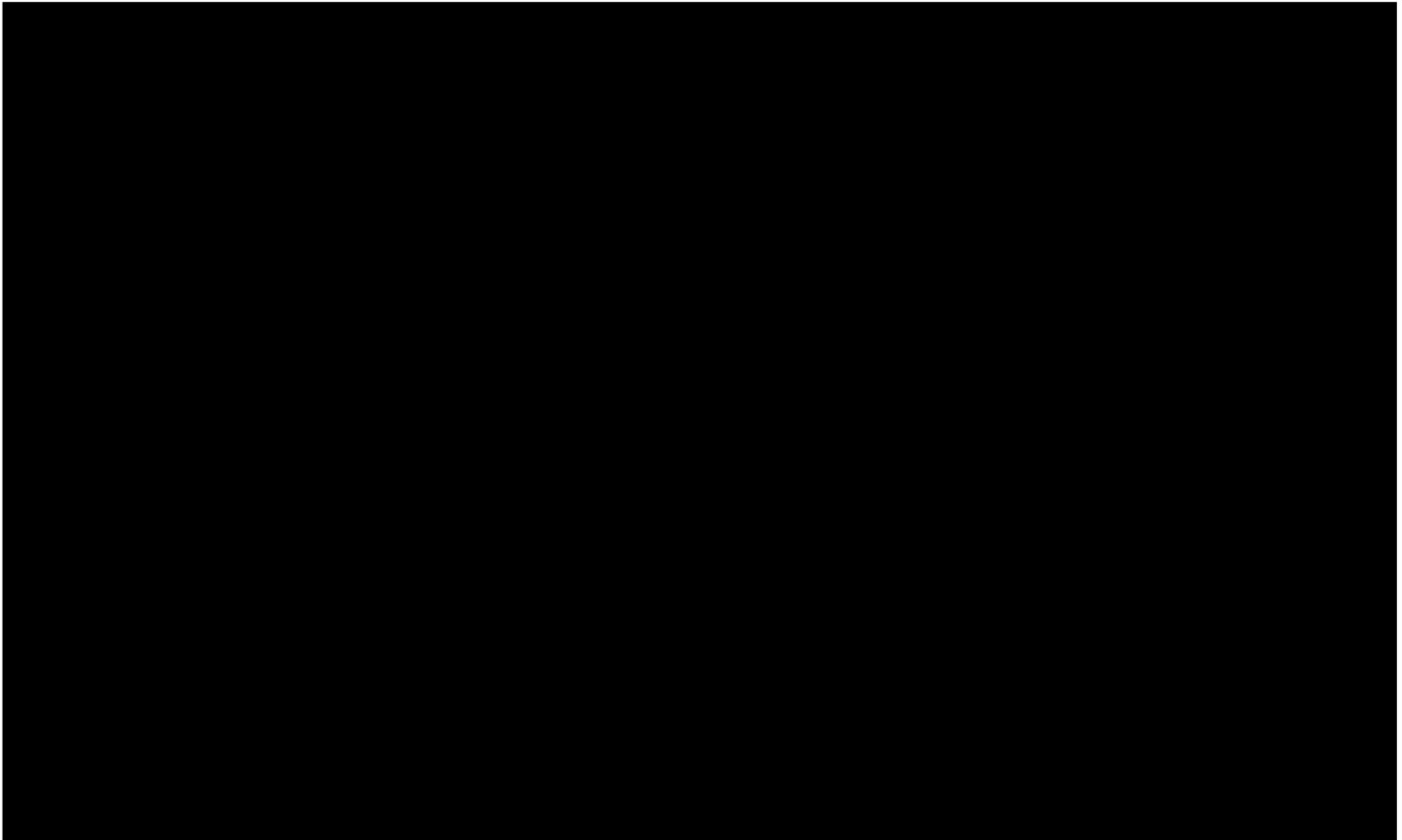
Integrate Amazon WorkMail with your existing corporate directory,

Set up interoperability with Microsoft Exchange Server

# Features

- Keep track of Business process
- Work mail provides Email with Calendar services
- Integrate with AWS securities
- Key management services

# Amazon WorkMail



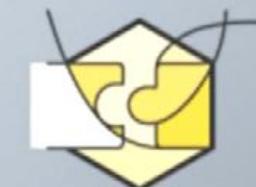
# Features of WorkMail



Managed Service



Enterprise-Grade Security



Outlook Compatible



Anywhere Access



Low Cost

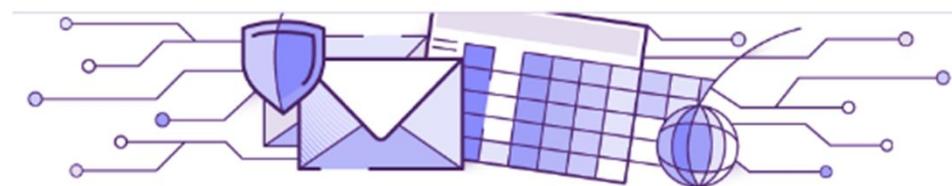


Active Directory Integration

<https://data-flair.training/blogs/amazon-workmail/>

# Functions of Amazon WorkMail

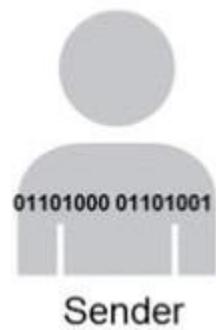
- Enterprise Grade Security.
- Compatibility with Microsoft Outlook.
- Journaling.
- Active Directory Integration.
- Administrative SDK.
- IMAP Protocol Support.
- Interoperability with Microsoft Exchange Server.
- Feature rich web client.
- Remote Management.
- Large storage for Mailboxes.
- Protection against Spam and viruses.



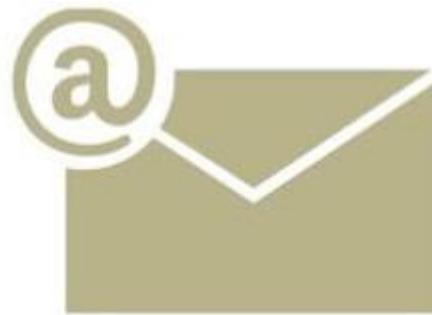
# AWS Work mail

- Sign in to AWS account and open the AmazonWorkMail console
- Click the Get Started button.
- Select the desired option and choose the Region from the top right side of the navigation bar.
- Fill the required details and proceed to the next step to configure an account.
- Go to users and create new users for the default domain space
- Now click to the application tab in the left panel and click to the url.
- It will open the mail application. Provide the username and password

- Work Mail uses the Amazon SES (simple Email service) to deliver your messages to the recipient which the SMTP implemented



Sender



Amazon SES



Receiver ISP

# Demo- Quick Setup

## Using Wizard [3 Setup procedure]

Create a new directory

Create a free test domain

Use default encryption key to protect mailbox contents

1. Under Business Application in Dashboard find WorkMail
2. Choose Quick Setup
3. Provide a Domain name [E.g. pesu-mail]
  - adding users, groups, resources, domains, or mobile policies.
  - Check details
4. Create a user name with password (Atlest 3 users) and enable user access
5. Create a group and add few existing users.
6. Create a resource- [E.g. Schedule a Meeting with contact info]
7. Change to custom domain and mobile policy [**If required**]

**Click the URL in Organization settings  
E-mail [Explore other possibilities]**

Login and send mail from the members chosen from address book

**Calendar [Explore other possibilities]**

Schedule a meeting with other users

Login to different users and see the output

## Reference

1. <https://www.youtube.com/watch?v=9sj2UqKMKGI&t=468s>
2. <https://youtu.be/3Wq-ghtB0XQ>

## Free services

<https://aws.amazon.com/workmail> [upto 15 users]

<https://aws.amazon.com/free>

## Start-up ideas

<https://aws.amazon.com/activate>

# G Suite

# G Suite



# G Suite

- G Suite - previously Google Apps for Work and Google Apps for Your Domain is now G Suite
- It is brand of cloud computing, productivity and collaboration tools, software and products developed by Google, first launched on August 28, 2006
- Google – email client – Gmail – top providers of email
- Gmail – just an email service. Users who have gmail account can have access to G Suite
- **G Suite's Basic edition includes 30GB of online storage per user.**
- For unlimited storage, upgrade to the Business or Enterprise edition.

# What you can do?

- You can
  - Connect – reach your colleagues wherever they are
  - Access – store file and find what you need instantly
  - Create – everything you need to bring your project to life
  - Control- manage users, devices, and data securely and easily

# G Suite Services

- Drive – cloud storage, file backup systems
  - All files, photos etc.
  - 15GB space , Allows to purchase morespace
- Docs – Write documents
  - Leave it as it is, it will save automatically
- Sheets – create worksheets
- Slides – can be converted in any platform
- Forms – for survey, Data stored in sheets

- **Calender** – Reminder, schedules
- **Groups** – connect users into one
- **Sites** – to create simple sophisticated web pages
- **Hangouts** – to communicate with your friends, customers either through texting or video calls
- **Blogger** – run your own blogger
- **Classroom** – for teachers to connect to students, setting assignments
- **G+** - Social network profile
- **You tube** – account to create your own video channel and post your videos there

# Specific Products



Unlimited no. of users  
Unlimited storage for  
each user



Google  
Apps for Work

Commercial site for  
Private organization

# Any Platform...



# Shareable, editable, Versioning



# Where you can find??

- Open gmail account, use the apps icon at the top right corner
- Click on it and start using it.



# Document Service

- Fully managed, secure, enterprise document storage and sharing service
- Key features and benefits
  - Administrators can add file, delete, modify
  - Drag and drop
  - Across multiple devices
  - Office docs
  - Txt files
  - Users can share internally and externally

