Mail Integration

Integrating Client’s official mail application(Ex – Outlook, Zoho, etc.,) to Revenuintel.

Purpose

* To share the KPI reports generated from CRO dashboard, Ideal customer profile, and from other features pages.
* To share user activity reports, team reports, Invoices, account owner related reports and various reports generated in admin console
* For admin to generate and share user activity, login reports, contact an existing user and group moderator and group members regarding user profile and access management matters.

Functionality – User Aspect

User – all types of users

* When report is successfully generated, following options should be given to the user.
  1. To share it via email
  2. To share it in slack
  3. To upload in client’s official cloud storage
  4. To download locally in the system – If it’s downloaded locally, a record should be created and maintained in that user profile. Super admin and Admin should have access and records to all the reports related activities.
* Following are the details to be added in user activity report

1. User name
2. Report name, Report generation time, date, IP address
3. Report downloading time, date, IP address

Functionality – IP Admin Aspect

* When a report is generated in any page of the product, it should be recorded in user activity record of that particular user. These recorded activities will be added as a list view in user profile display.
  + - * Following are the details to be added in user activity report
        1. User name
        2. Report name, Report generation time, date, IP address
        3. Channel used to share the report (mail, slack or cloud storage)
        4. If downloaded locally, Report downloading time, date, IP address
* IP Admin should be able to view and access the list contains the details of reports generated during a custom time period.
* Expiration time limit should be set for user activity records. Once the expiration time is reached an automatic deletion of all the records should happen and new records should be created in that space.
* A reminder message to be sent to IP admin on expiration date of user activity records and to create a backup of those records.