Standard Operating Procedure (SOP)

Title: Creation of Single and Bulk Email IDs on New Platform by Zoho Delegated Admins through eForms

Objective:
This SOP outlines the process for the creation of single and bulk email IDs through the new automated platform in eForms by Zoho Delegated Admins (DAs). Please follow the steps below to complete the process efficiently.

Scope:
This procedure applies to Zoho Delegated Admins who have the necessary permissions to access the platform and perform email ID creation tasks.

Pre-requisites:

- You must be connected via **Zscaler**.
- You must have the **Zoho DA-Admin role** to access and perform actions on the platform.

Procedure:

1. Login to eForms Platform:

- Open the eForms platform by navigating to eforms.nic.in.
- Login with your **Zoho email ID**.

2. Access Delegated Admin Panel:

- After login, you will see the **Delegated Admin** panel on the left side of the dashboard.
- Click on this panel to view the requests available for processing.

3. View Pending Requests:

- On the dashboard, you will see a list of **single and bulk requests** that are currently pending with you.

4. Authenticate Yourself:

- Click on the **"Authenticate yourself on New Email Platform"** button (in red color).
- You will be redirected to the Zoho platform for authentication.

5. Login to Zoho Platform:

- Enter your **Zoho email ID** (the one assigned for DA console access) and **password** to log in to the Zoho platform.

6. Successful Authentication:

- Upon successful authentication, you will be redirected back to eForms.
- The **"Authenticate yourself on New Email Platform"** button will now turn **green**, indicating that you have been successfully authenticated.

*Note: Authentication is a **one-time process**.

7. Create Email ID (Single Request):

- Click on the **Delegated Admin panel** again.
- Select the **Action** button next to the request you want to process.
- Click on the **"Create email ID"** button.

8. Provide Remarks:

- In the space provided, enter any relevant **remarks** related to the request.
- Click on the **Create ID** button to proceed with the creation.

9. Confirmation Pop-up:

- A **pop-up window** will appear confirming that the email ID creation request was successfully processed.
- In the pop-up, click on **"User Details"** to view the request details.

10. Track Request Status:

- In the **Delegated Admin Panel**, click on **"Under Process Request"** to view all requests where action has been taken.
- To track the status of a request, click on the **Track icon** available in the **Action column**.
    - Initially, the icon will be **Yellow** (indicating that the request is under process).
    - After 2-3 minutes, the icon will turn **Green** (indicating that the request has been completed).

11. Notification of Completion:

- Upon successful completion of the request, all stakeholders and the user will receive **email and SMS notifications** regarding the successful creation of the email ID.

12. Bulk Email ID Creation:

- The procedure for **bulk email ID creation** follows the same steps as the single email ID creation process outlined above. The **bulk request** will be processed similarly, with updates and notifications sent accordingly.

Notes:

- Ensure you are connected through **Zscaler** and have the correct permissions (Zoho DA-Admin role) to access and execute the steps.
- The authentication process is required only once. Subsequent requests will not require re-authentication.

This SOP aims to provide clear and easy-to-follow instructions to help Zoho Delegated Admins perform email ID creation effectively. If you encounter any issues, please contact the support team for assistance.