

BPO_CALL LOGGER

VERSION RELEASE NOTES

BPO_Call Logger Version List:

[\[1.0.0.1\]](#)

1.0.0.1 (06.09.2018 3:00 PM)

Client Configuration Requirements:

- This application is only to be used by clients who are using the 'Work Order Item Auto Assign' functionality

Call Logger Service Functionality:

- BPO_CallLogService is a server based service that checks a specified POP3 email account for emails from clients and logs BPO calls.
- The call is logged for the BPO contact who sends the email.
- If the email address is not found then the email domain is checked for a match against a customer's website domain.
- If an email address does not match a contact and the domain is not matched, then the call is logged against an "Unassigned customer" which is configured in the service config as DefaultCustomerCode. The unassigned customer will not be configured to receive automated emails.
- Calls can be created from emails not sent from a customer email address but forwarded internally by wrapping the contact's email address with ~@...@~, e.g.. ~@contact@domain.com@~

- The subject line of the email is checked for a call reference and if a call reference is found the service will not create a new call.
- The email subject is used as the Call Description and the email content is added as a call note.
- There are two text files that are used to filter incoming emails. Items can be added or removed in these files as required with any plain text editor.
 - SpamAddressList.txt: all incoming emails with a from address containing the text in one of the listed entries will be skipped. E.g. "@facebook.com" in the list will block any email from an email address at facebook.com.
 - SubjectExceptionPatterns.txt: all incoming emails with a Subject containing the text in one of the listed entries will be skipped. E.g. "Out of Office" will exclude any email with Out of Office anywhere in the subject line.

Configuration:

- BPO CallLogger uses environments configured by BPO Service Manager and supports multiple environments that are set up in the Configuration.xml file.
- Configuration.xml settings:
 - **tblTimerSettings**
Section containing the settings for the intervals between checking the configured email accounts.
 - **IntervalAmount**
Time interval between checking email account
 - **IntervalUnit**

Time interval units (sec/min/hr)

- **tblEnvironments**

Indicates a row in which a specific environment is configured

- **Environment**

Name of the environment configured in BPO Service Manager

- **DefaultCustomerCode**

Customer code of default customer if contact cannot be found

- **Process**

Yes/No to indicate whether to process this environment

- **CallEmailServer**

POP3 email server name/IP address

- **CallEmailPort**

POP3 email server port

- **CallEmailUsername***

POP3 email account username. *Changing this also requires the password to also be updated with the plain text password and Encrypted to be set to "No".

- **CallEmailPassword***

POP3 email account password.*Changing this also requires the username to also be updated and Encrypted to be set to "No".

- **CallEmailEnableSsl**

Specify whether POP3 server uses SSL.
(Yes/No)

- **CallEmailLastSequence**

Indicates the last email index retrieved from the email account. Set to 0 for new environment configuration to retrieve all mail. It should not be necessary to change this value but it can be changed to reprocess previously fetched emails.

- **Encrypted***

Indicates whether the username and passwords in the configuration have been encrypted in the configuration file. *Set this to “No” when updating the username and password and the service will encrypt it the next time it checks for email.



Upgrade Notes:

- Run BPO_CallLogger-1.0.0.1-Release to install the Windows service.
- Edit the BPO_CallLogger Service in Local Services and set it to Automatic. It may need to be started manually when first installed.
- Run the BPO_CallLogger_v1.0.0.0-v1.0.0.1_Upgrade.

BPO Configuration Requirements:

- An “Unassigned customer” to be created into BPO
- WO Item Auto Assign flag to be set to Yes in Company Config.
(Note that if this flag is being set to Yes specifically for this application, some data work will need to be done to ensure that each customer has only one WO Default Item).

Email Configuration - Extra Info:

- Outlook:
 - CallEmailServer: outlook.office365.com
 - CallEmailPort: 995
 - CallEmailEnableSSL: Yes
- Gmail:
 - CallEmailServer: pop.gmail.com
 - CallEmailPort: 995
 - CallEmailEnableSSL: Yes
 - Gmail users have to enable Allow less secure apps at <https://my-account.google.com/lesssecureapps>

Files Required:

Installer and Upgrade Script

BPO.RSI.036

