

COMPANION APPLICATIONS

INTRODUCTION TO CRM REMINDER SERVICE

Requirements

Internet Information Services (IIS) must be configured. BPOConnect, BPOCRM and BPOCRM_WebServices must be installed. RSI_ServiceManager must be installed and have a valid environment configured. The email settings as configured in the Service Manager will be used to send out the reminder emails. The BPOCRM_ReminderService must be installed on the same server as the BPO database and main BPOCRM application.

BPOCRM_ReminderService is a Local Service that runs on a time basis as defined in the Envn.xml file.

Introduction

BPOCRM_RecommendationEngine needs to be installed, configured and managed on your server

This service monitors Activities where you have selected to be reminded by email, and will send out an email reminder for your upcoming activities.

Ribbon Access: BPOCRM_RecommendationEngine



Introduction to CRM Reminder Service

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Services (Local)	() Services (Local)	(
	BPO CRM Reminder Monitor	Name	Description	Status	Startup Type	
	Start the service Description: Monitors and processes CRM Reminders	ActiveX Installer (AxInstSV)	Provides Us	Manual		
		Adobe Acrobat Update Service	Adobe Acro	1/ 1/1/1/1/1/1/		
		Alloyn Router Service		Manual (Trigger Start		
		App Readiness	Gets apps re		Manual	
		Q Application Host Helper Service	Running	Automatic		
		Application Identity	Determines	÷.	Manual (Trigger Start	
		Application Information	Facilitates t	Manual (Trigger Start Manual		
		Application Layer Gateway Service	Provides su			
		Application Management	Processes in	Running	Manual	
		AppX Deployment Service (AppXSVC)	Provides inf	Manual		
		Image: State Service Image: Auto Time Zone Updater Image: State Service Image: State Service	n 11	Running	Automatic (Delayed	
			Start		Disabled	
			Stop	Automatic (Delayed		
			Pause	Running	Automatic	
			Resume	Running	A 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
		SitLocker Drive Encryption Service	Restart		Manual (Trigger Star	
		Block Level Backup Engine Service Block Level Backup Engine Service	All Tasks >		Manual Manual (Trianas Star	
		Bluetooth Hanostree Service	10000	Running	Manual (Trigger Start Manual (Trigger Start	
		BPO Auto Close Call Service	Refresh	Manual Manual		
		A BPO Call Logger	Properties			
		BPO Completed WO Service	U.J.		Manual	
		BPO CRM Reminder Monitor	Help		Manual	
		BPO Mail Service	Sends email	Sends email		
		BPO Notification Service	Manages co		Manual	
		(;	



ENVIRONMENT CONFIGURATION

- **Environment:** Type in the environment name, as defined for this database, in the Service Manager.
- Interval Amount and Interval Amount: Type in the time interval for this service to run. In this example, the service will run once every 60 seconds.



🗐 Envn - Notepad File Edit Format View Help		Х
<pre>ret to romat view Hep (?xml version="1.0" encoding="utf-8" standalone="yes"?> (NewDataSet></pre>		

START SERVICE

 Once you have done the service configuration, you need to start the service from the *Administrative Tools > Services* screen in

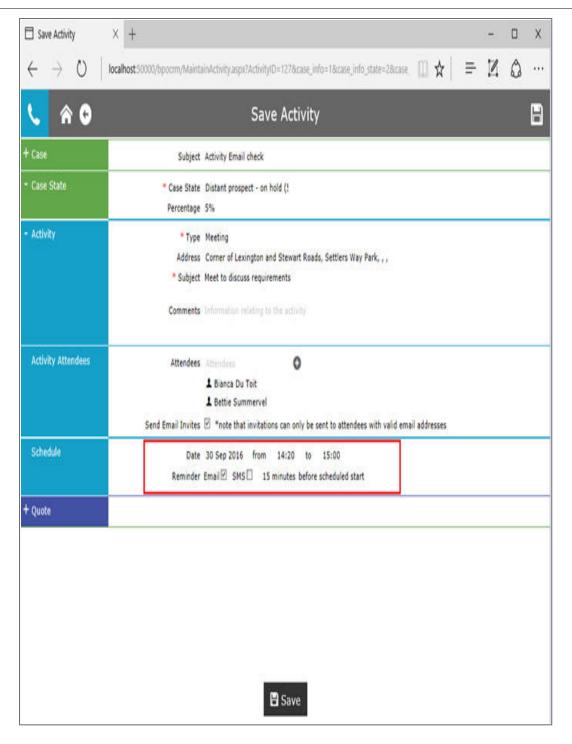


Windows.

 Ensure this service is set to 'Automatic (Delayed Start), which will ensure the service is restarted if your server is restarted. Then right click on the service and select 'Start'.



Introduction to CRM Reminder Service



EXAMPLE REMINDER EMAIL

• Example of an Activity Reminder Email



Introduction to CRM Reminder Service

িglignore X SojJunk∗ Delete	Archive Reply Reply Forward More -	NoReply Team Email	G To Manager ✓ Done ✓ Create New	0 0 It	Move	🔁 Rules * 🔊 OneNote 🕑 Actions *	Mark Unread	Categorize	Follow Up *	a Translat
Delete	Respond	Qui	ck Steps	6		Move		Tags	6	
F	ri 2016/09/30 2:44 PM									
U r	noreply@ .co.za									
		0000005								
	RM Reminder: Meet to discuss requi	rements								
To										
ACTIVITY										
Subject:	Meet to discuss requirements									
Contact:	Bettie Summervel									
Mobile:										
Telephone:	031 123 4567									
Customer:	Betties Summer Shop at the Beach									
Business:	30 September 2016, 14:20 - 15:00									
Schedule:	그렇다 같은 데 같은 것이 있는 것은 것이 같아? 한 것이 가지 않았다. 나는 것 같아?	ettlers Way Park								
	Corner of Lexington and Stewart Roads, S	ettlers Way Park								
Schedule:	그렇다 같은 데 같은 것이 있는 것은 것이 같아? 한 것이 가지 않았다. 나는 것 같아?	ettlers Way Park								
Schedule: Location:	그렇다 같은 데 같은 것이 있는 것은 것이 같아? 한 것이 가지 않았다. 나는 것 같아?	ettlers Way Park								

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