

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.

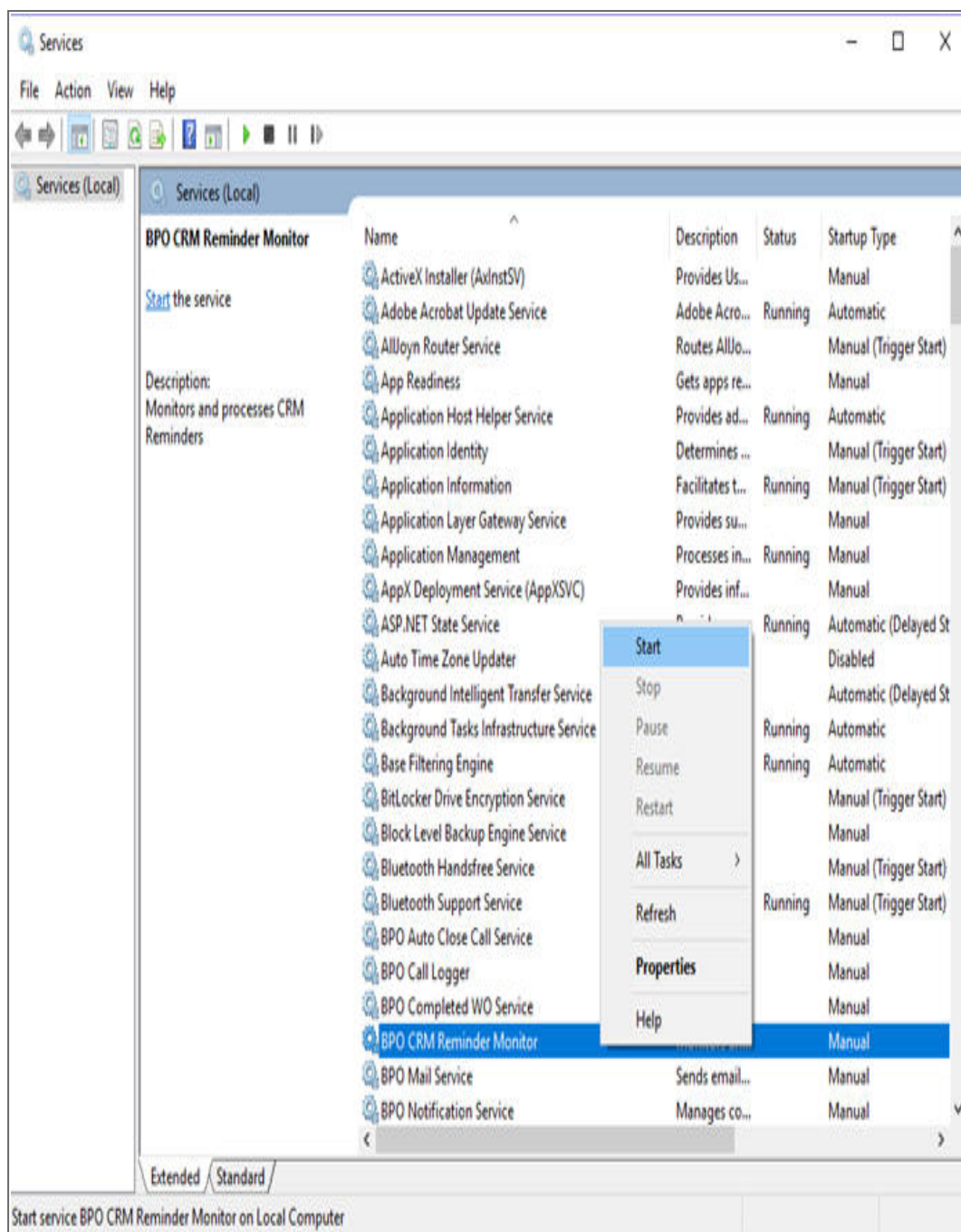
BPOCRM_ReminderService is a Local Service that runs on a time basis as defined in the Envvn.xml file.

Introduction

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

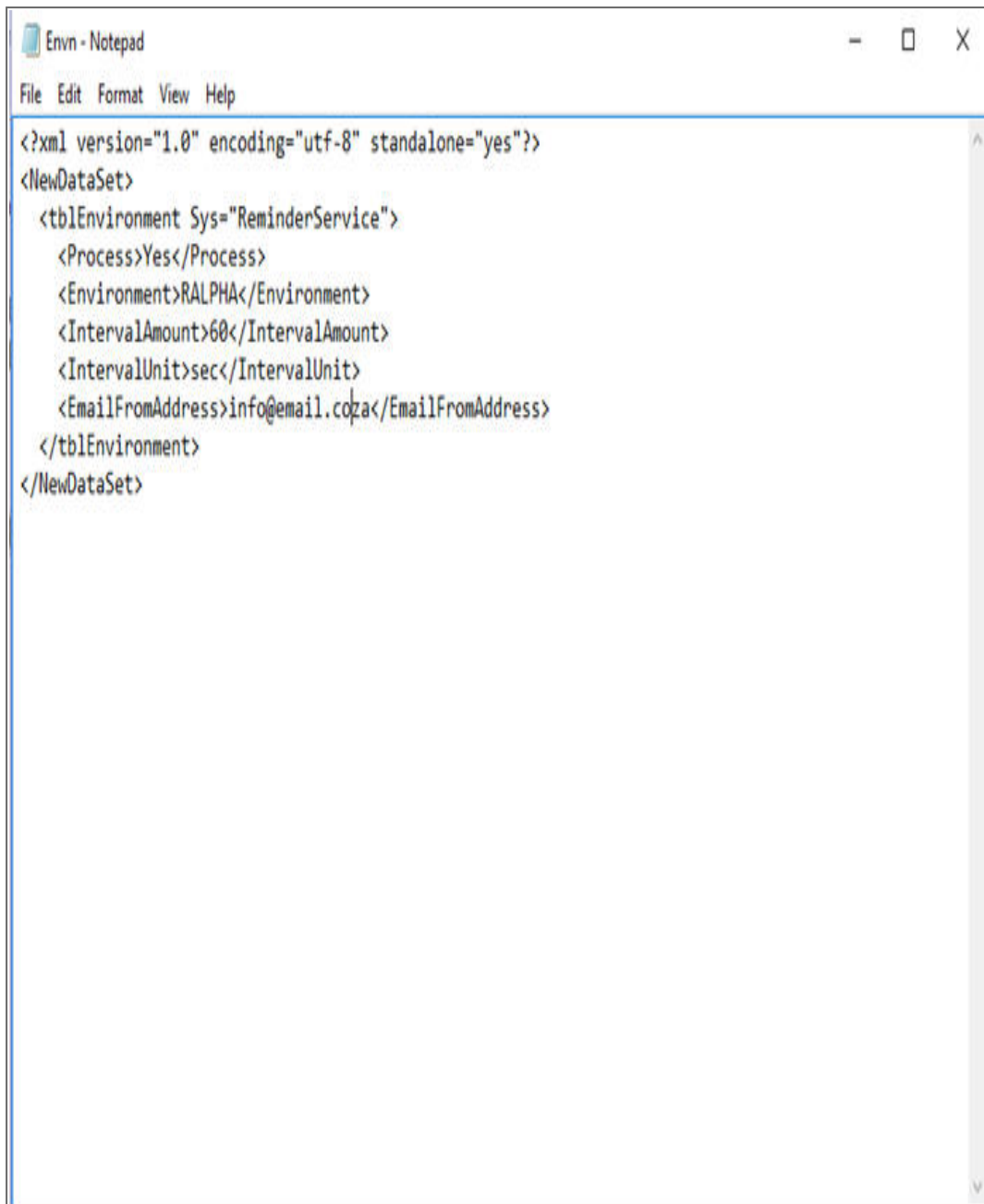
This service monitors Activities where you have selected to be reminded by email, and will send out an email reminder for your upcoming activities.

Ribbon Access: *BPOCRM_RecommendationEngine*



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.



```
<?xml version="1.0" encoding="utf-8" standalone="yes"?>
<NewDataSet>
  <tblEnvironment Sys="ReminderService">
    <Process>Yes</Process>
    <Environment>RALPHA</Environment>
    <IntervalAmount>60</IntervalAmount>
    <IntervalUnit>sec</IntervalUnit>
    <EmailFromAddress>info@email.co.za</EmailFromAddress>
  </tblEnvironment>
</NewDataSet>
```

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**'.

Save Activity

localhost:50000/bpocrm/MaintainActivity.aspx?ActivityID=127&case_info=1&case_info_state=2&case...

Save Activity

+ Case

Subject: Activity Email check

- Case State

* Case State: Distant prospect - on hold (!)

Percentage: 5%

- Activity

* Type: Meeting

Address: Corner of Lexington and Stewart Roads, Settlers Way Park, , ,

* Subject: Meet to discuss requirements

Comments: Information relating to the activity

Activity Attendees

Attendees: Attendees

Bianca Du Toit

Bettie Summervel

Send Email Invites: ☒ *note that invitations can only be sent to attendees with valid email addresses

Schedule

Date: 30 Sep 2016 from 14:20 to 15:00

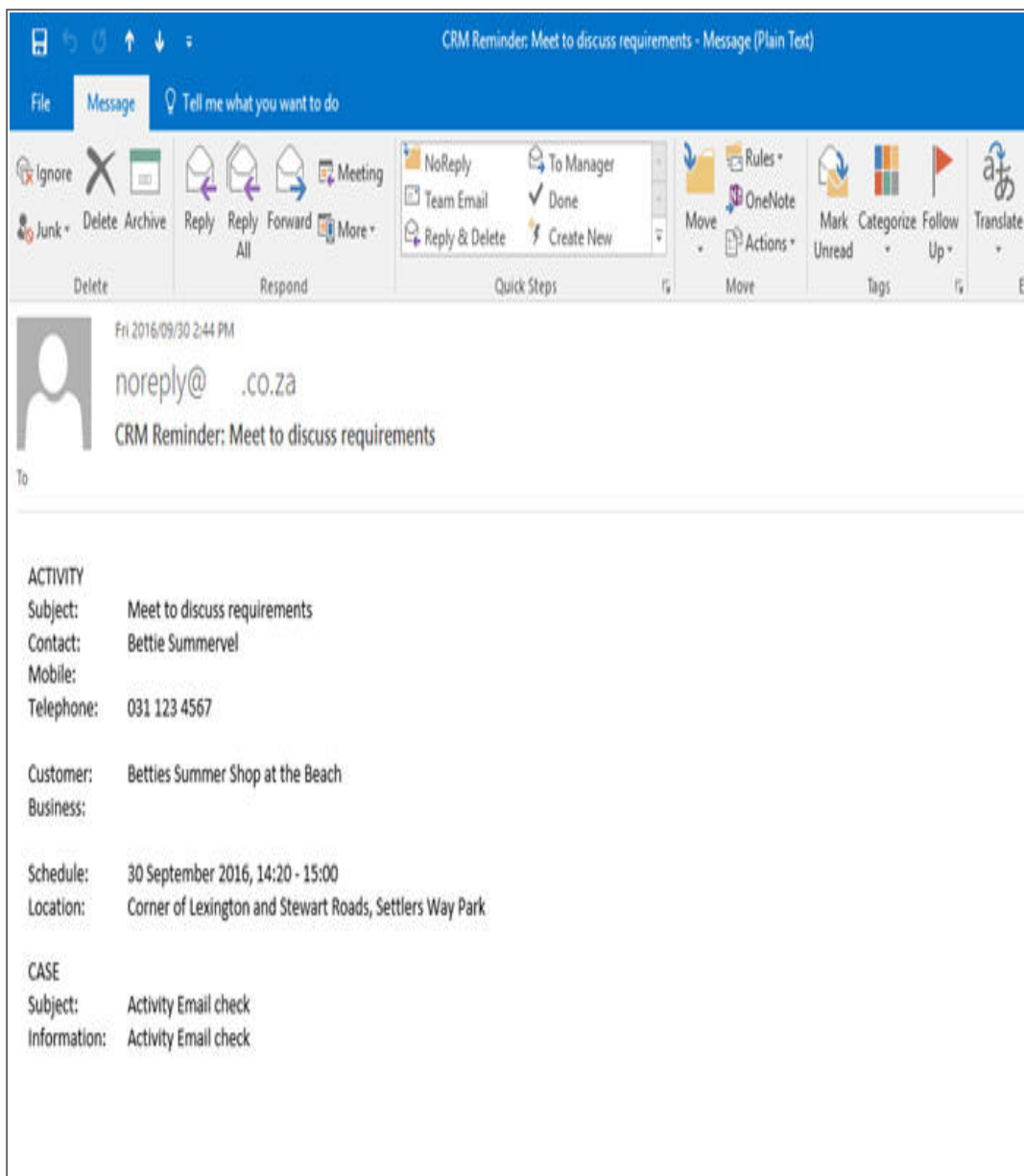
Reminder Email ☒ SMS ☐ 15 minutes before scheduled start

+ Quote

Save

EXAMPLE REMINDER EMAIL

- Example of an Activity Reminder Email



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