

We are currently updating our site; thank you for your patience.

CRM CUSTOMERS

RECOMMENDATIONS

Recommendations are notifications that that you can view and follow up on. For example, you may receive a notification that a [Rank Call is due](#), or a contract expiry or contact birthday.

You can configure which recommendation types to use from within **BPO**.

The **CRM Recommendation Engine** must be installed and configured on the server, and be set up to run nightly via the **Windows Task Scheduler**.

Client specific recommendations can be accessed from the **Customer Home page**. A full list of recommendations can be accessed from the **Dashboard (Home page)**.

Ribbon Access: Webpage > `http://[servername]:[port-no]/BPOCRM/User.aspx`

Access the customer-specific list of Recommendations from the CRM Cus-tomer Home page



UNDER CONSTRUCTION

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