

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

## 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 Env.n.xml file.

#### Introduction

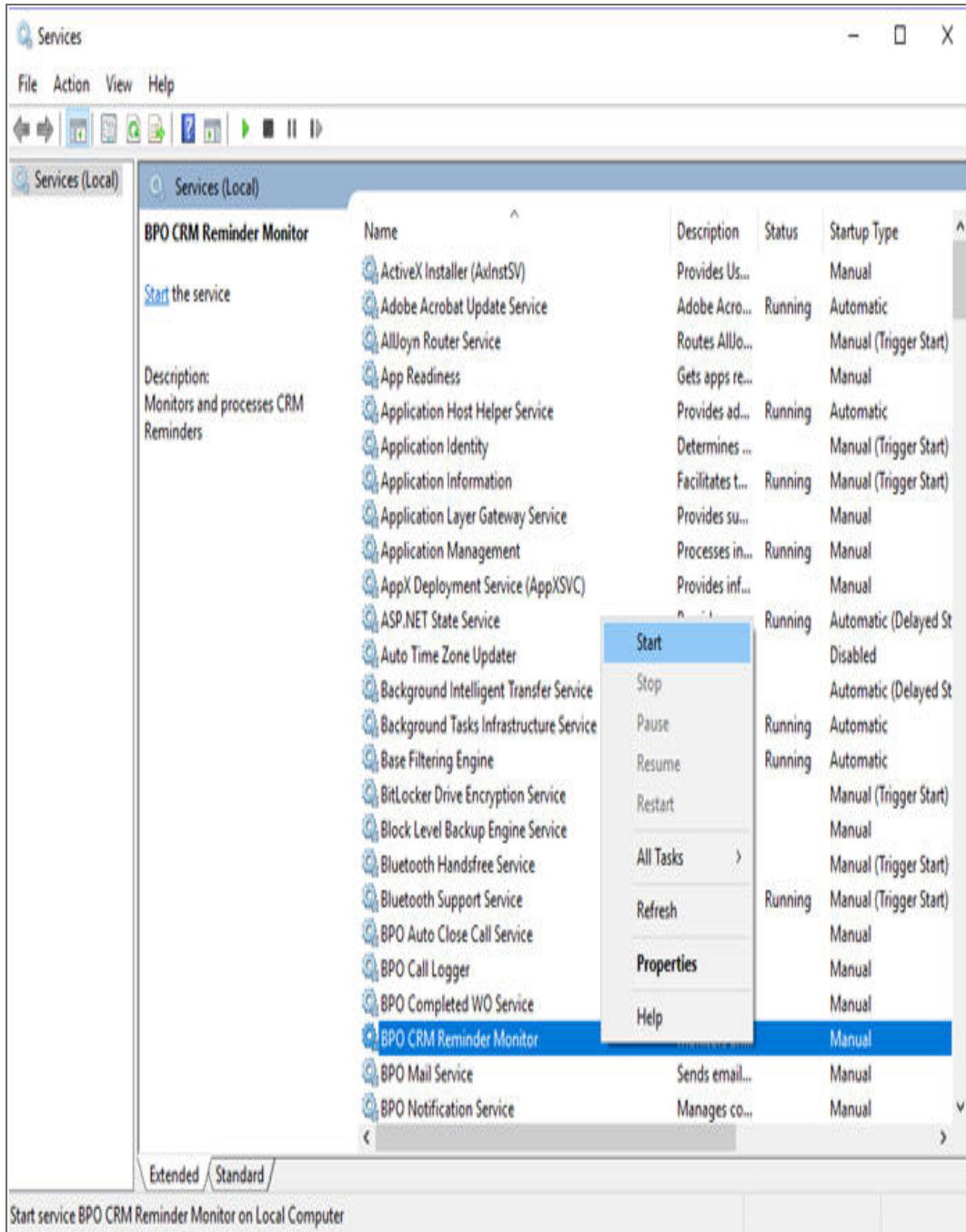
BPOCRM\_RecommendationEngine needs to be installed, configured and managed on your server

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

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**Ribbon Access:** BPOCRM\_RecommendationEngine

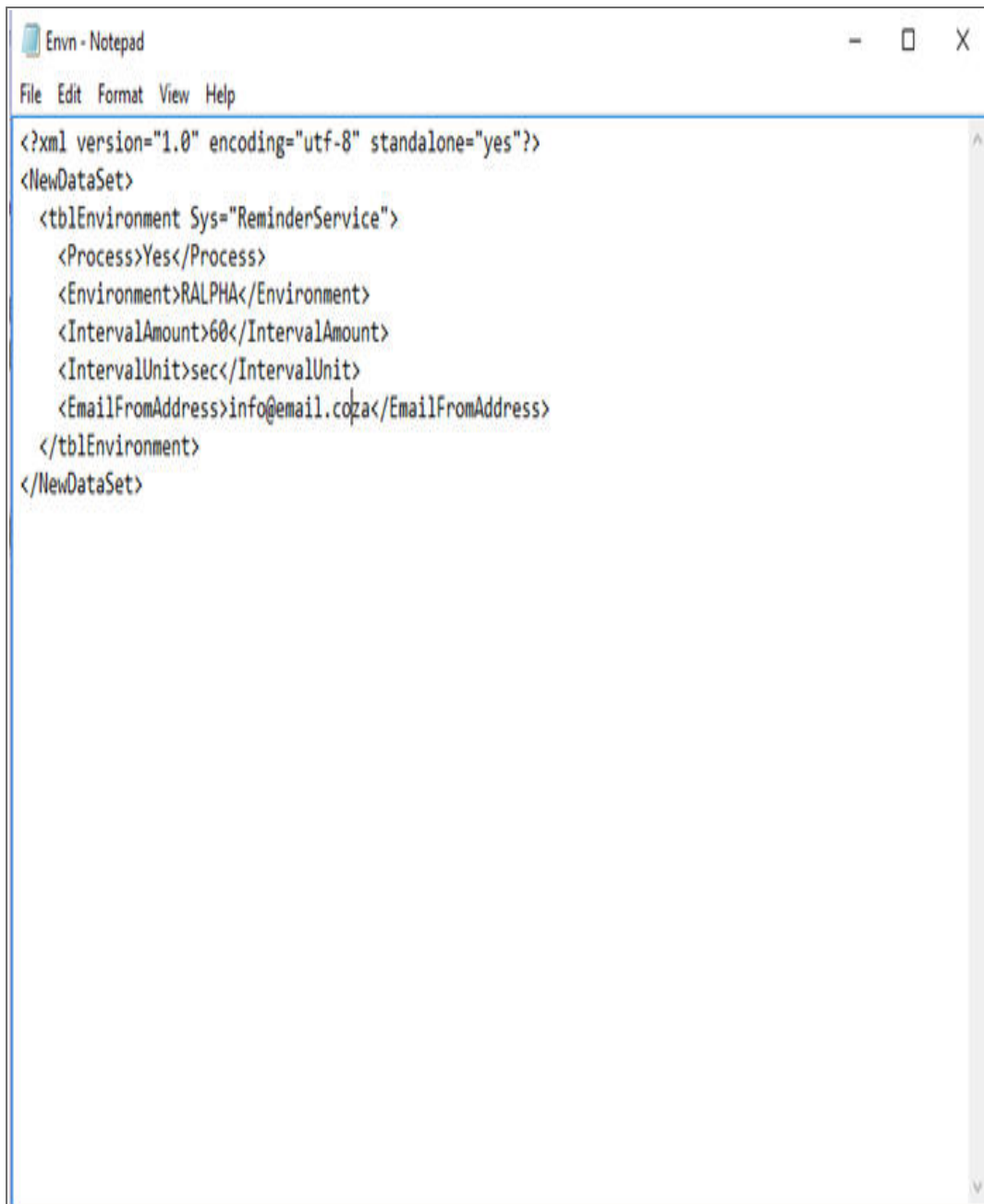
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## ENVIRONMENT CONFIGURATION

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- **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
<?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.coza</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=28&case...

**+ 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

The screenshot shows an Outlook window with the title "CRM Reminder: Meet to discuss requirements - Message (Plain Text)". The ribbon includes "File" and "Message" tabs. The ribbon contains various icons for actions like Ignore, Delete, Archive, Reply, Forward, Meeting, NoReply, To Manager, Done, Create New, Move, Actions, Mark, Categorize, Follow Up, and Translate. The email content is as follows:

Fri 2016/09/30 2:44 PM  
noreply@.co.za  
CRM Reminder: Meet to discuss requirements

To

**ACTIVITY**  
Subject: Meet to discuss requirements  
Contact: Bettie Summervel  
Mobile:  
Telephone: 031 123 4567

Customer: Betties Summer Shop at the Beach  
Business:

Schedule: 30 September 2016, 14:20 - 15:00  
Location: Corner of Lexington and Stewart Roads, Settlers Way Park

**CASE**  
Subject: Activity Email check  
Information: Activity Email check

CAP.007.001

