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 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

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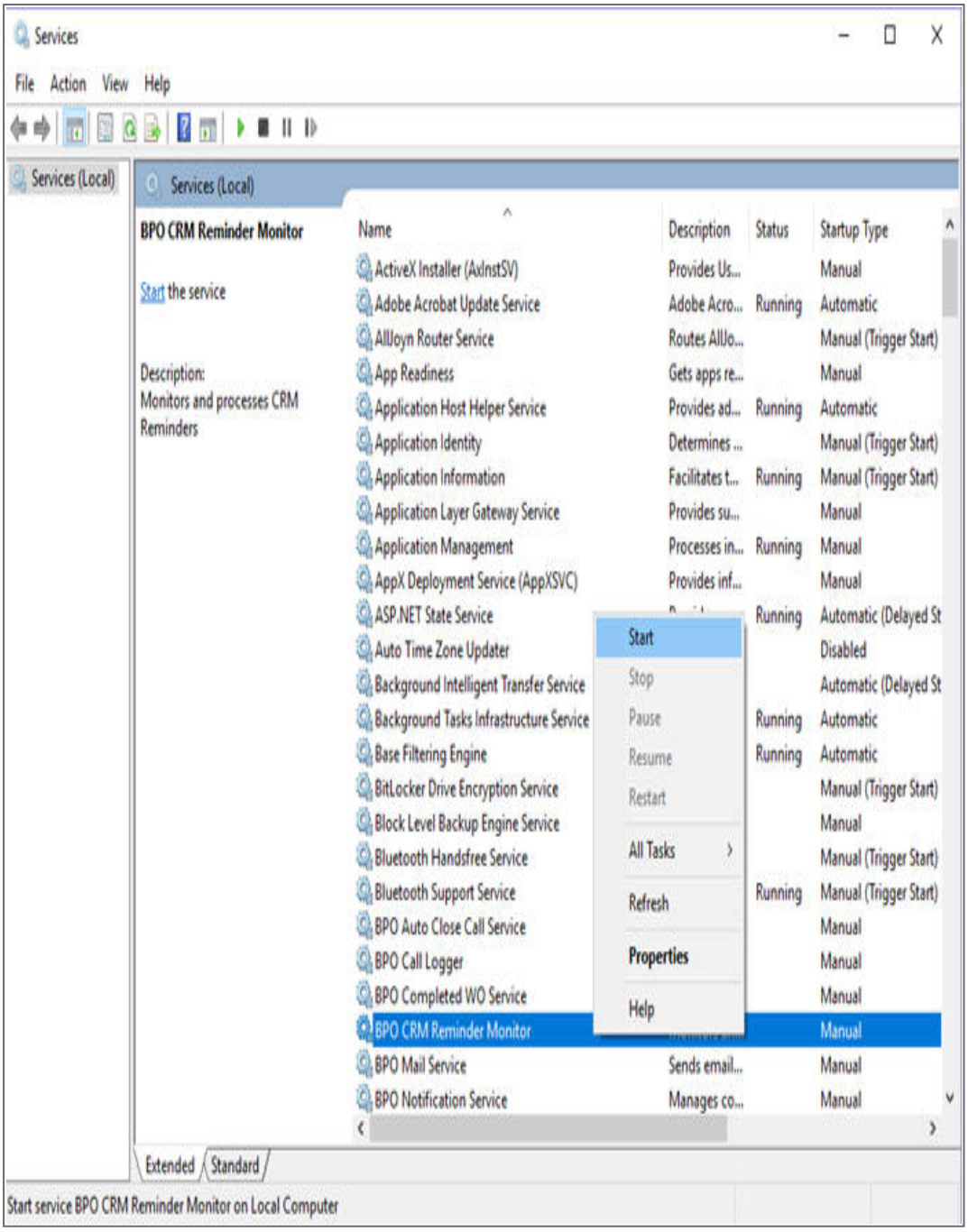

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ENVIRONMENT CONFIGURATION

- **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.

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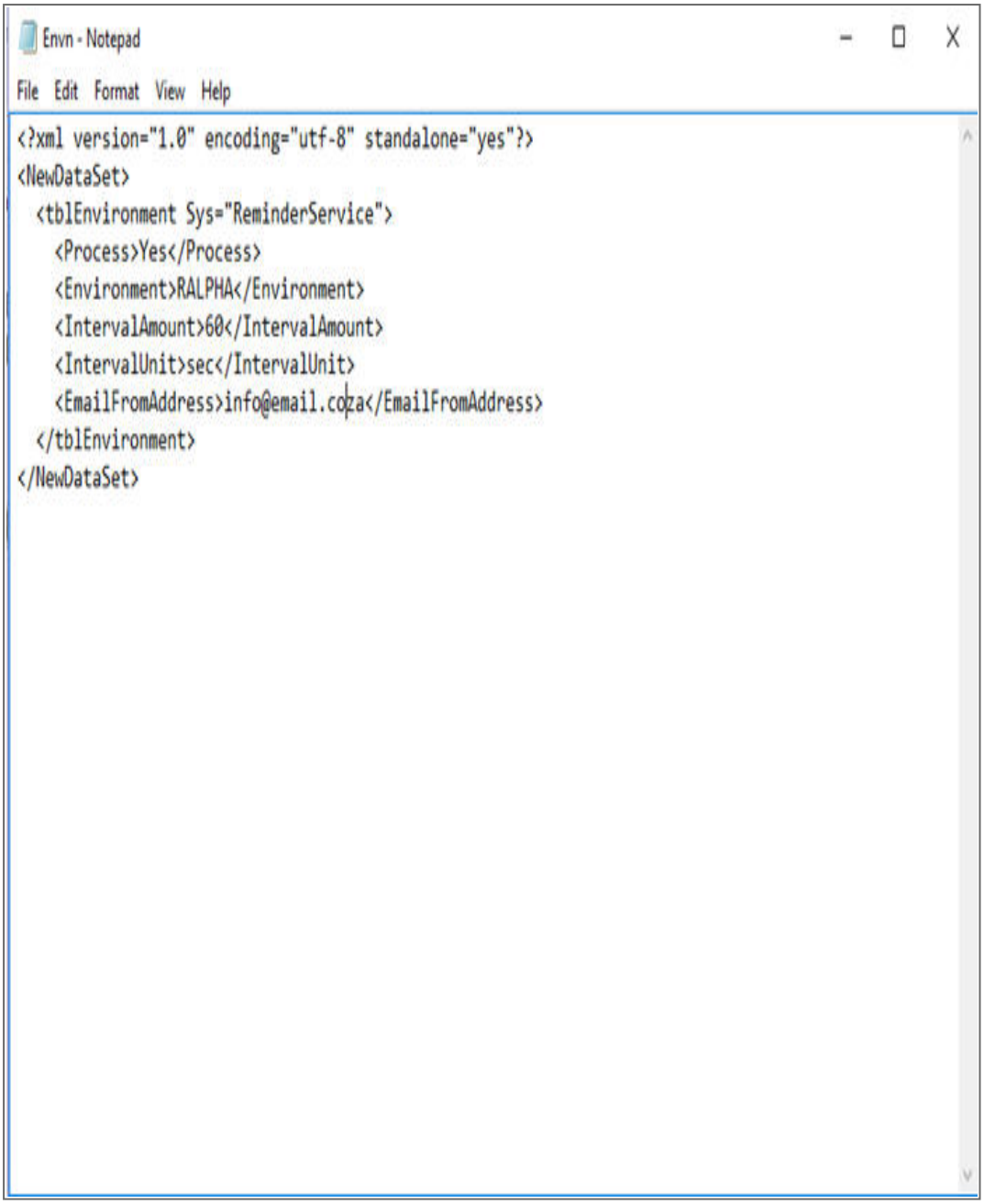

START SERVICE

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

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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**'.

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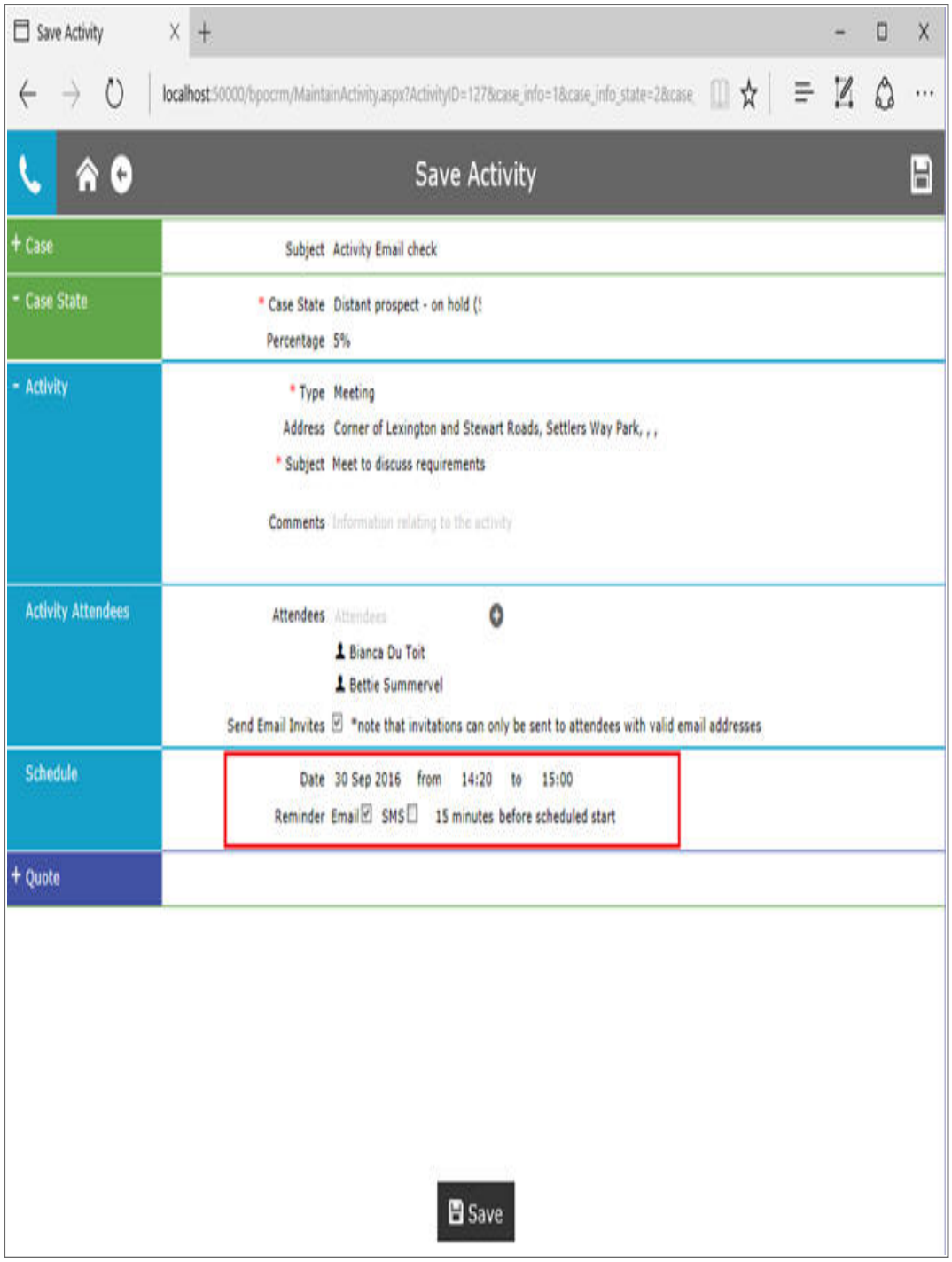

EXAMPLE REMINDER EMAIL

- Example of an Activity Reminder Email

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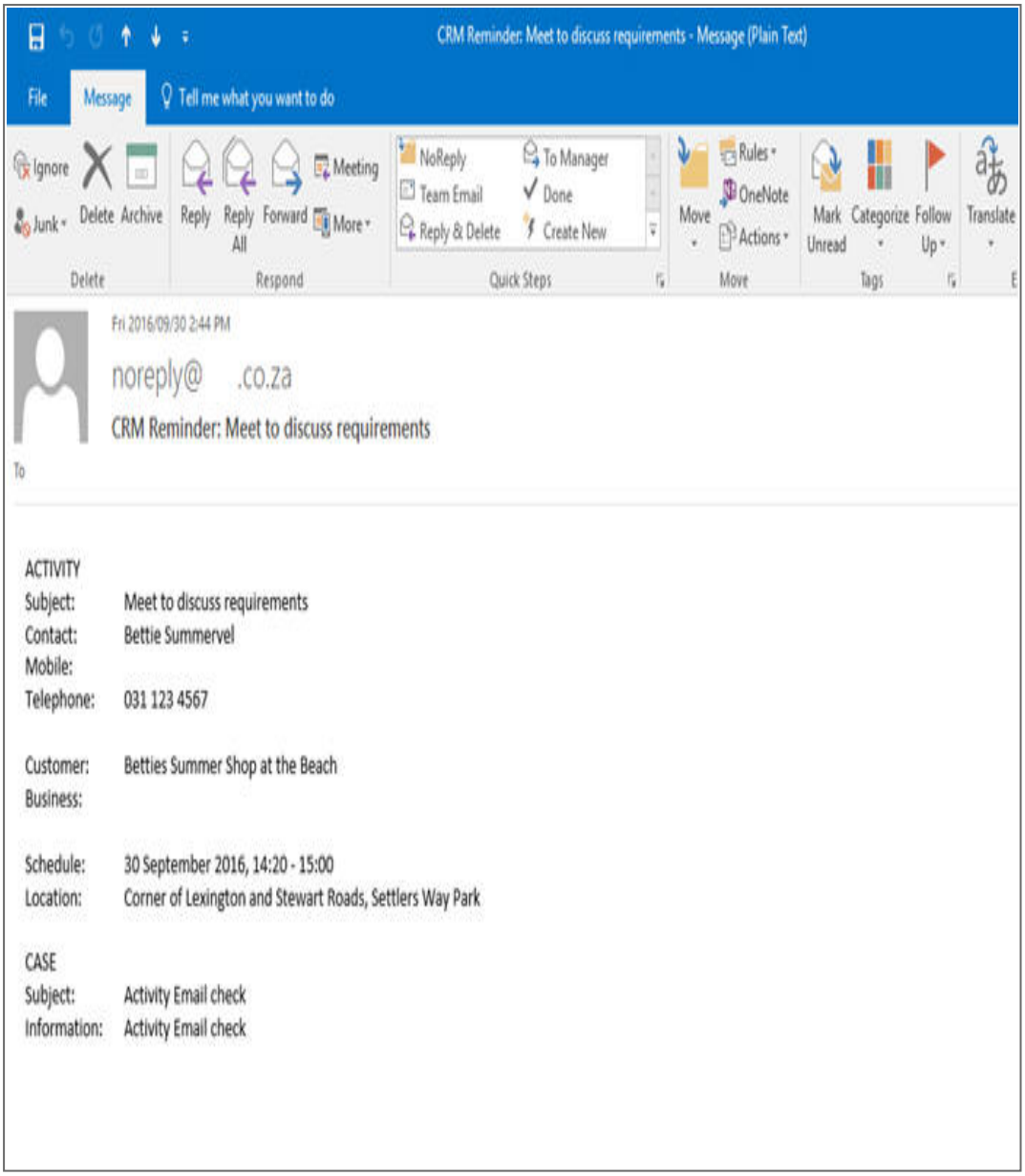

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