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

COMPANION APPLICATIONS

INTRODUCTION TO CRM RECOMMENDATION ENGINE

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.

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

A full list of recommendations can be accessed from the Dashboard (Home page), or customer specific recommendations can be accessed from the Customer Home page.

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 BPOCRM_RecommendationEngine must be installed on the same server as the BPO database and main BPOCRM application.
- BPOCRM_RecommendationEngine must be configured in Windows Scheduler to run nightly.
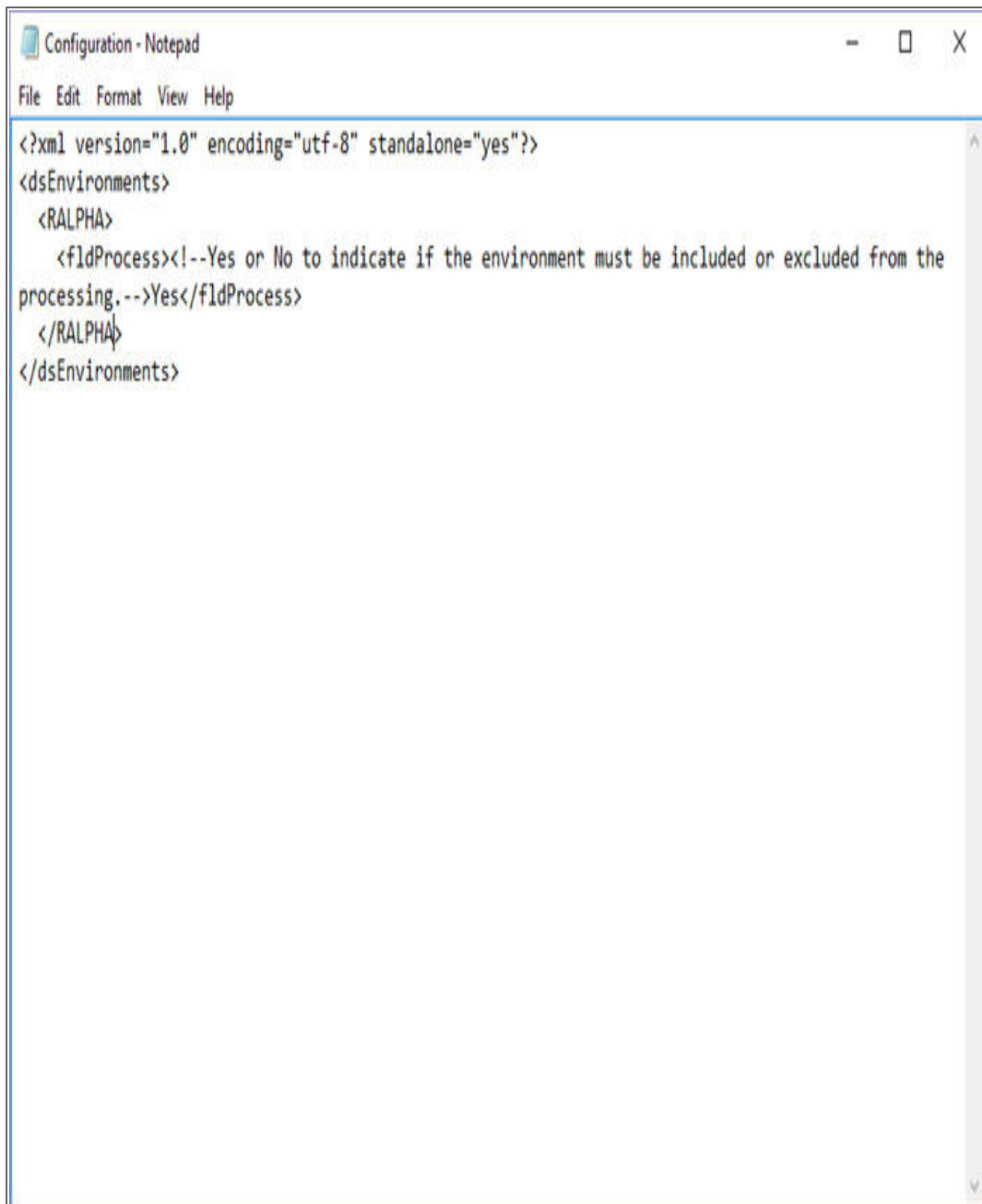- You need configure which recommendation types to use from

within BPO.

- Each customer must be linked to a valid Customer Rank.

Ribbon Access: BPOCRM_RecommendationEngine

ENVIRONMENT CONFIGURATION

- **Environment:** Type in the environment **name**, as defined for this database, in the Service Manager.
- Select **Yes** to process the selected environment.

```
Configuration - Notepad                                    —   □   X

File  Edit  Format  View  Help

<?xml version="1.0" encoding="utf-8" standalone="yes"?>
<dsEnvironments>
  <RALPHA>
    <fldProcess><!--Yes or No to indicate if the environment must be included or excluded from the
processing.-->Yes</fldProcess>
  </RALPHA>
</dsEnvironments>
```
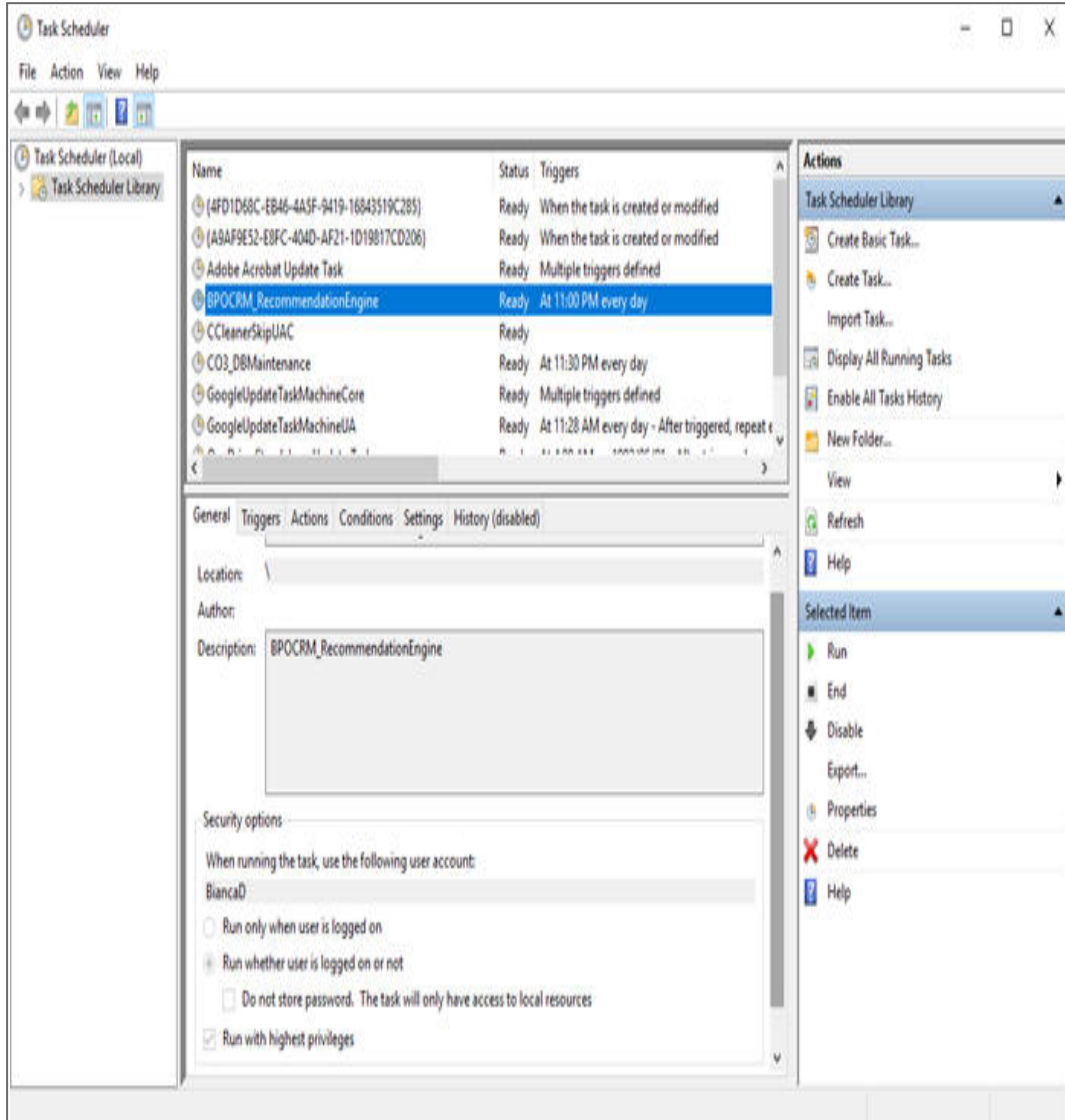
CONFIGURED SCHEDULED TASK

- Once you have done the service configuration, you need to set up a Scheduled Task in Windows.

- Ensure that the service runs whether user is logged in or not and runs with Administrator rights.
- Test the Scheduled Task to ensure it is configured and running correctly.

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