

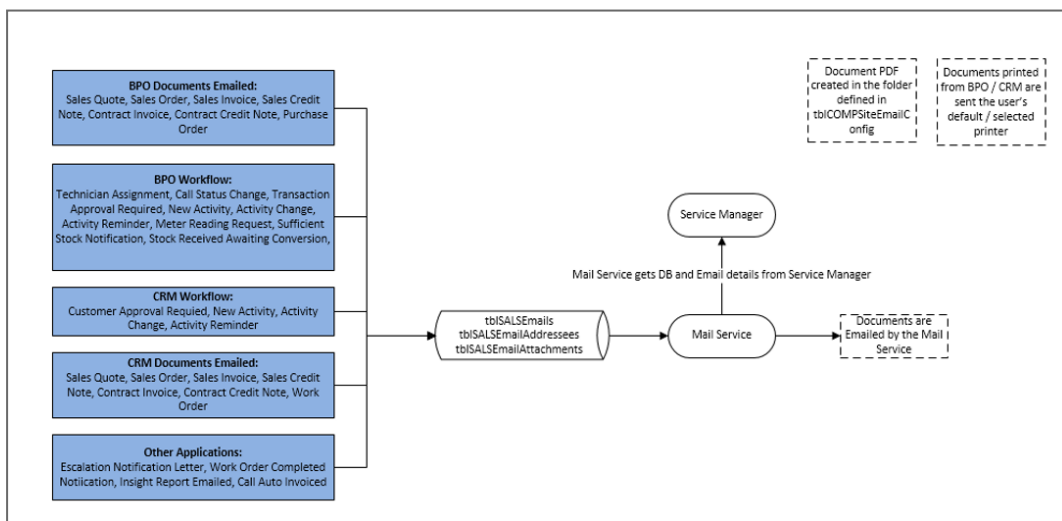
We are currently updating our site; thank you for your patience.

## BPO MAIL SERVICE

The Mail Service sends out all emails that are not handled by the Print Service.

Mail Service (sends Emails based on unsent records in tblSALSEmails that are not handled by Print service).

- Gets Environment details from Service Manager.
- Monitors Sales Email table (records created from various places within our software suite)
- Document PDF saved to 'Invoices' folder within the Mail Service folder
- Related To Types NOT handled:
  - CINV Sales Invoice
  - CRNT Sales Credit Note
  - CTIN Contract Invoice
  - CTCN Contract Credit Note



RelatedToType	Description	Process
CINV	Sales Invoice	Print Queue Reprint in BPO
CRNT	Sales Credit Note	Print Queue Reprint in BPO
CTIN	Contract Invoice	Print Queue \ Print Queue Reprint in BPO
CTCN	Contract Credit Note	Print Queue Reprint in BPO
CALL	Sales Quote	Select Email Document in BPO
CALL	Sales Order \ Proforma Invoice	Select Email Document in BPO
CALL	Sales Invoice	Select Email Document in BPO
CALL	Sales Credit Note	Select Email Document in BPO
CALL	Contract Invoice	Select Email Document in BPO
CALL	Contract Credit Note	Select Email Document in BPO
CALL	Purchase Order	Select Email Document in BPO
CTCA	Contract Credit Note Awaiting Approval	Release for Approval in BPO
CTRT	Contract Awaiting Approval	Release for Approval in BPO
SCRN	Sales Credit Note Awaiting Approval	Release for Approval in BPO
ADJR	Adjustment Request Awaiting Approval	Release for Approval in BPO
PREQ	Purchase Requisition Awaiting Approval	Release for Approval in BPO
PRAPP	Part Request Awaiting Approval	Release for Approval in BPO
PRRQ	Part Request Sufficient Stock	Workflow Notification - when stock received for open part request
PINV	Supplier Invoice Awaiting Approval	Release for Approval in BPO
ESCA	Contract Escalation Notification	Run Escalation Notifications in BPO
SCHED	New Activity Notification	Create New Activity in CRM
WKOR	Work Completed	Completed Work Service monitors calls and completes calls where all items have been actioned
PMON	Prepaid Contract Usage Limit Reached - Contract put on Hold	Prepaid Monitor Service monitors meter readings against contract usage limit
IRIC	Part Request Stock Received Awaiting Conversion to Asset	Workflow Notification - when stock received for open part request against asset warehouse

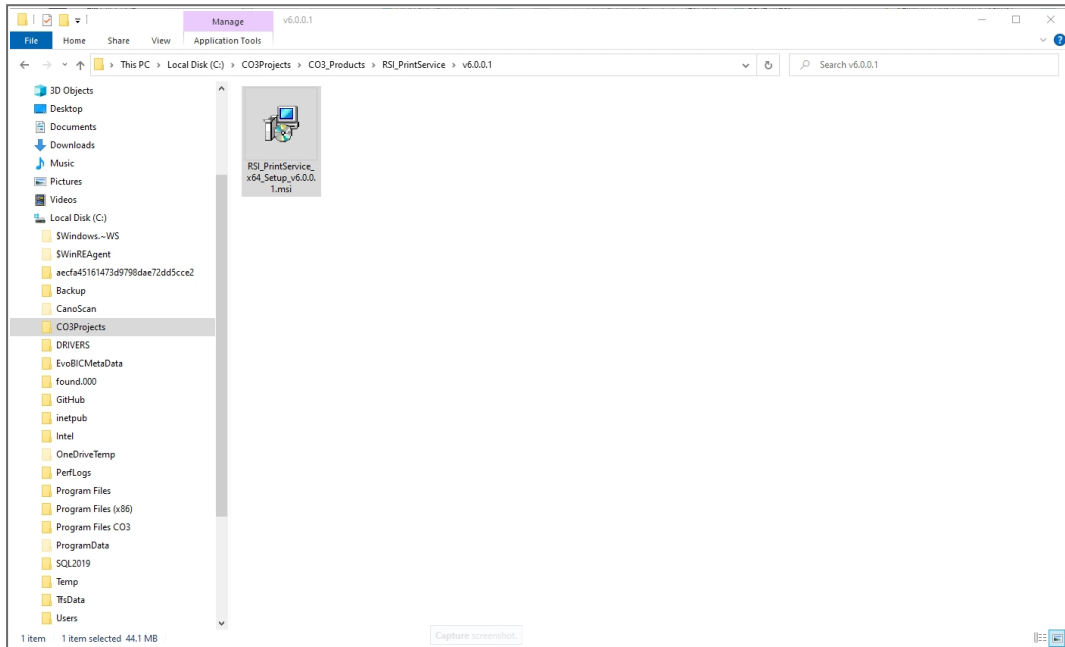
RelatedToType	Description	Process
PMNG	Technician Assigned to Project Notification	Assigned a Technician to a Project in BPO
WKRQ	Work Request Awaiting Approval	Work Request created in BPO
ACTIVITY	Activity Change Notification	Change made to the activity in CRM
CUST	Customer Awaiting Approval	Release a Customer in CRM
DRS	Distributed Reporting Services Report Generated	DRS Reporting Service checks for reports due to be run
REMINDER	CRM Activity Reminder	Reminder that Activity is due based on reminder set on Activity
QUOT	Quote Email	Quote emailed from CRM
QUOT	Quote Status Change	Quote Accepted / Rejected in CRM
WORKORDER	Work Order	Work Order Emailed from CRM
SALESCREDITNOTE	Sales Credit Note	Sales Credit Note Emailed from CRM
SALESORDER	Sales Order \ Proforma Invoice	Sales Order Emailed from CRM
SALESCREDITNOTE	Sales Credit Note	Sales Credit Note Emailed from CRM
CONTRACTINVOICE	Contract Invoice Report Email	Contract Invoice Emailed from CRM
SALESQUOTE	Sales Quote Report Email	Sales Quote Emailed from CRM
SALESINVOICE	Sales Invoice	Sales Invoice Emailed from CRM
MTRS	Meter Reading Request Email	Send Meter Reading requests from BPO
INSIGHT	Insight Report	Report emailed from Insight
SLIM	Contract placed on Hold (CO3 only)	Contract Placed on Hold by Service Limiter when support hours have been reached
TIME	Time Booked (CO3 only)	Time Manager application calculates and emails time booked
AREP	Service Report	Auto Reporter application creates service report per customer
CALL	New Call	New Call created in BPO
CALL	Call Assignment	Call Assigned to Technician in BPO
CALL	Call in Progress	Call moves to In Progress - either by call Assignment or call Acceptance
CALL	Call on Hold	Call Placed on Hold in BPO
CALL	Call in Pending	Call Placed in Pending in BPO
CALL	Call Completed	Call Completed in BPO
CALL	Call Closed	Call Closed in BPO
CALL	Call Invoiced	AutoInvoice application checks for billable items to invoice

## REQUIREMENTS

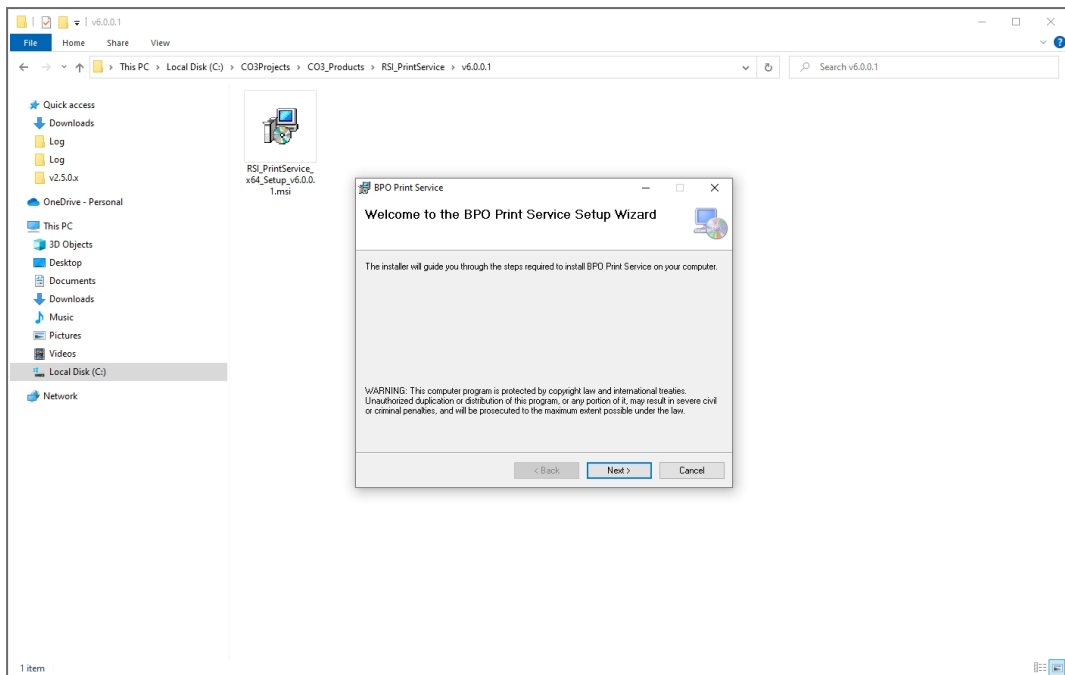
- This local service console application will be installed by your CO3 Analyst or BPO System Administrator on your company's application server, and run automatically through Windows Services at the interval defined in the Environment file. Confirm with your System Administrator to check on the interval configured for your company.

## INSTALLATION

- Double click on the 'RSI\_PrintService' install file.
  - **Note:** Check that you have the latest version compatible with your version of BPO.



- The **Installation Wizard** will open.
- Click on **Next**.

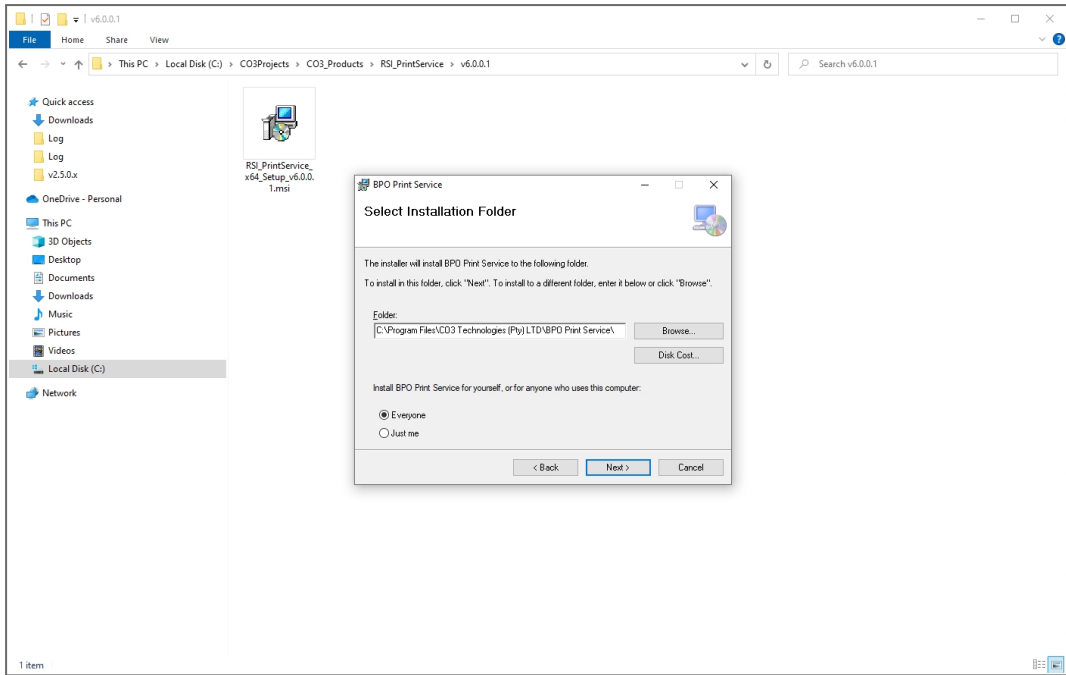


- The default location for installation is:

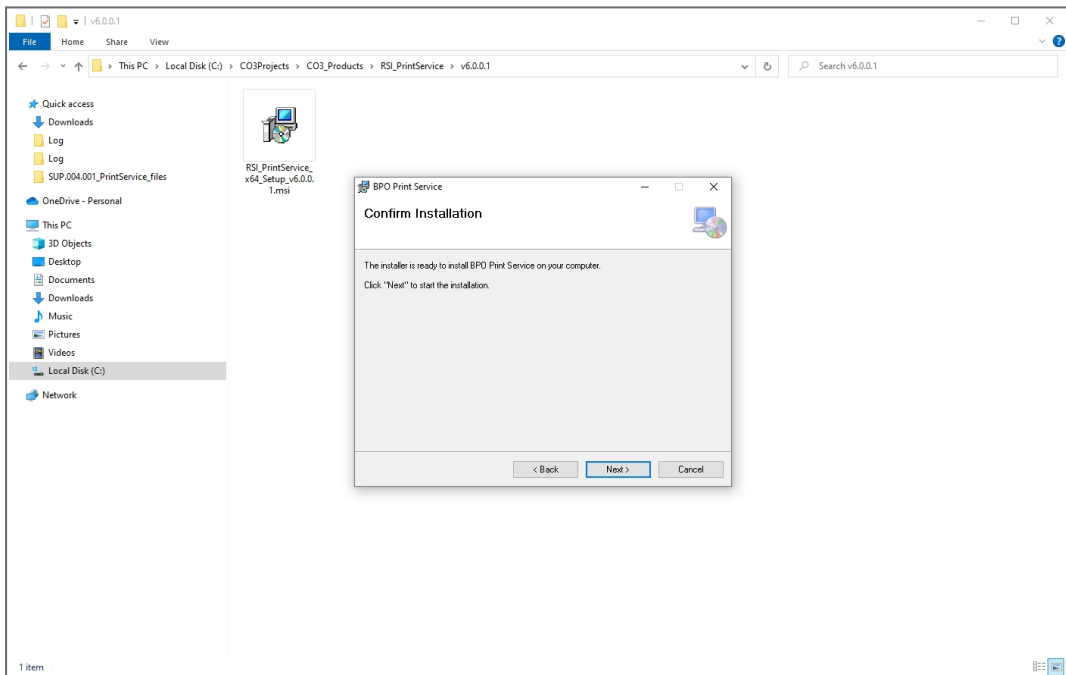
**C:\Program Files\CO3 Technologies (Pty) LTD\RSI Print Service**

It is recommended that you keep this default location. Keeping a standard will make upgrades easier.

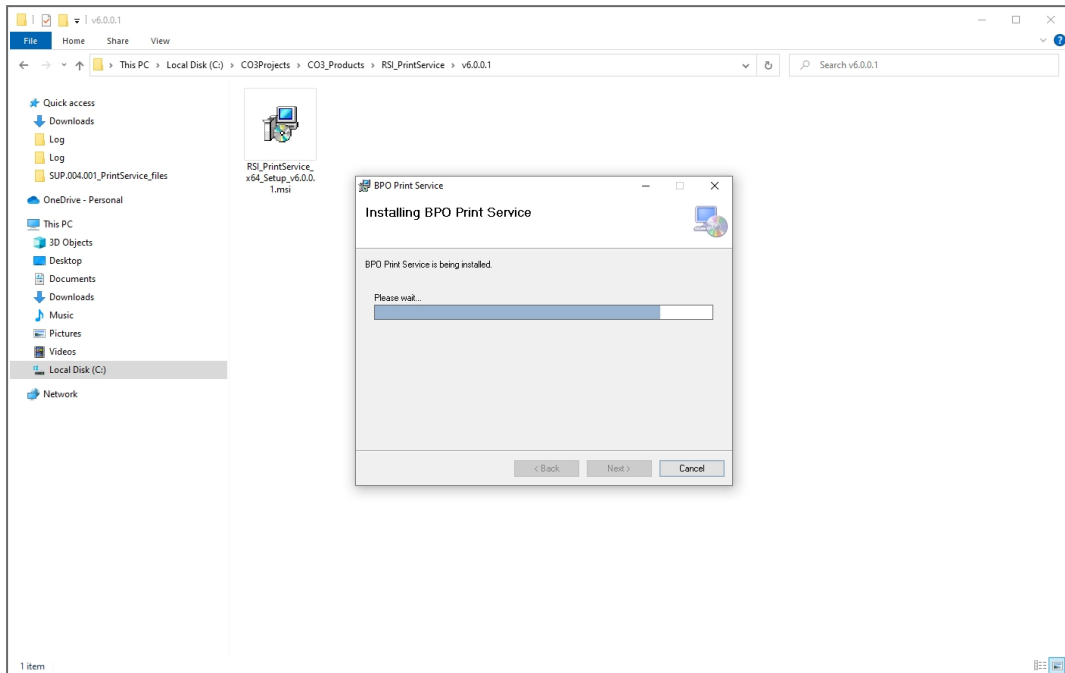
- Ensure that **Everyone** is selected for the install.
- Click on the **Next** button.



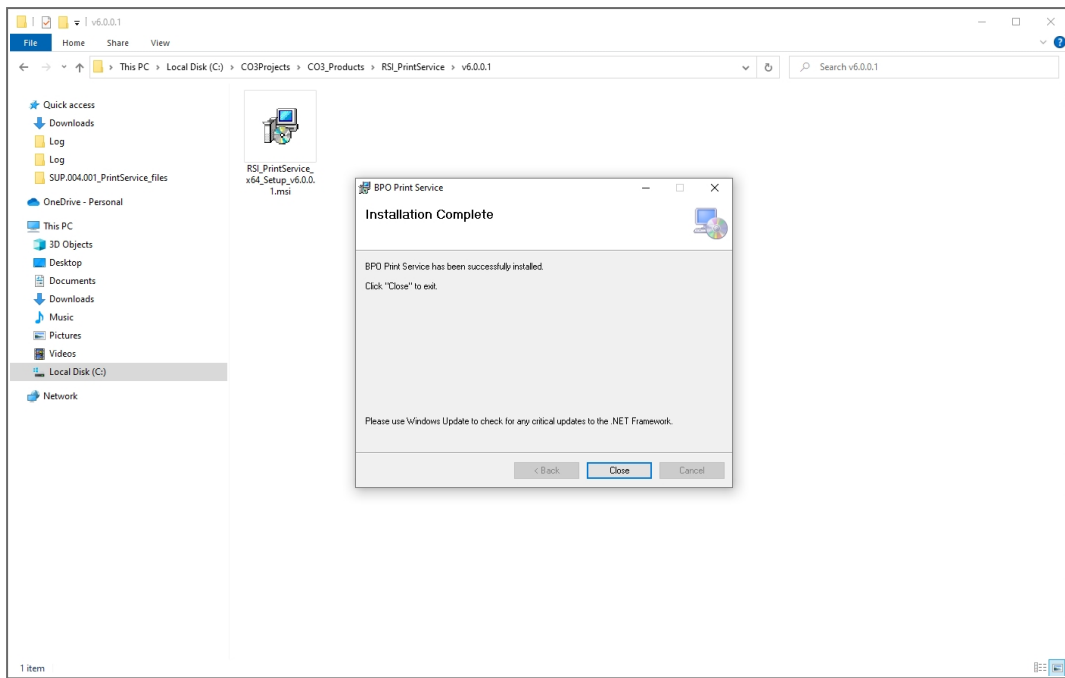
- The installer will ask you to **Confirm Installation**.
- Click on **Next** to start the installation.



- The **Print Service** installation will begin.
- **Wait** for it to be completed.



- Once Installation is **Complete**.
- Click on **Close**.

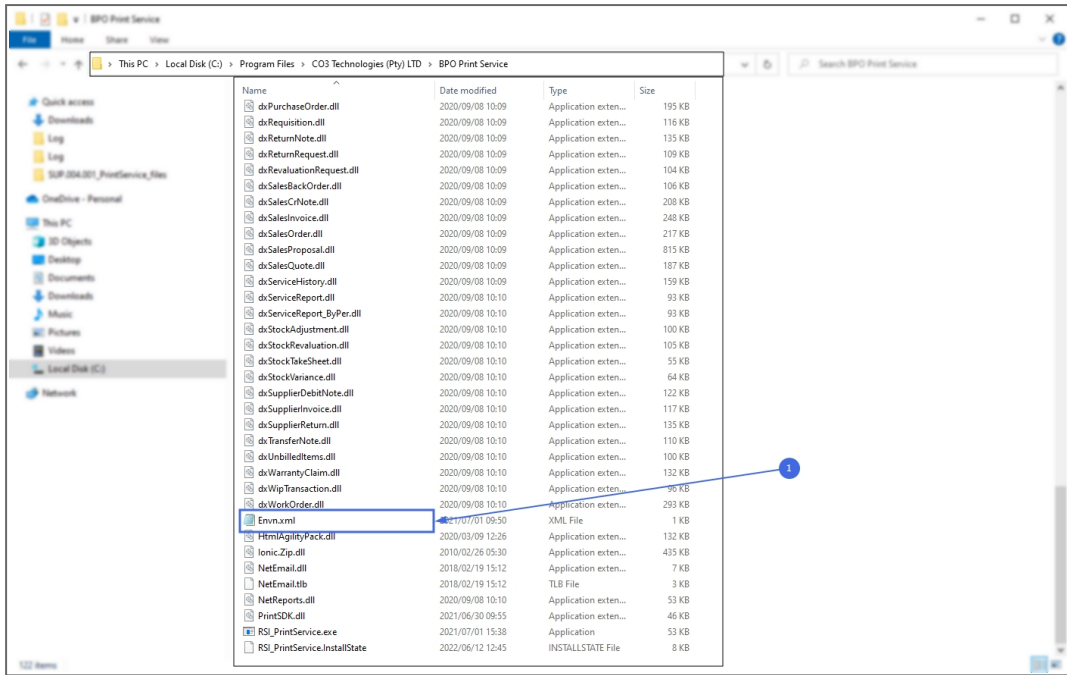


## CONFIGURATION

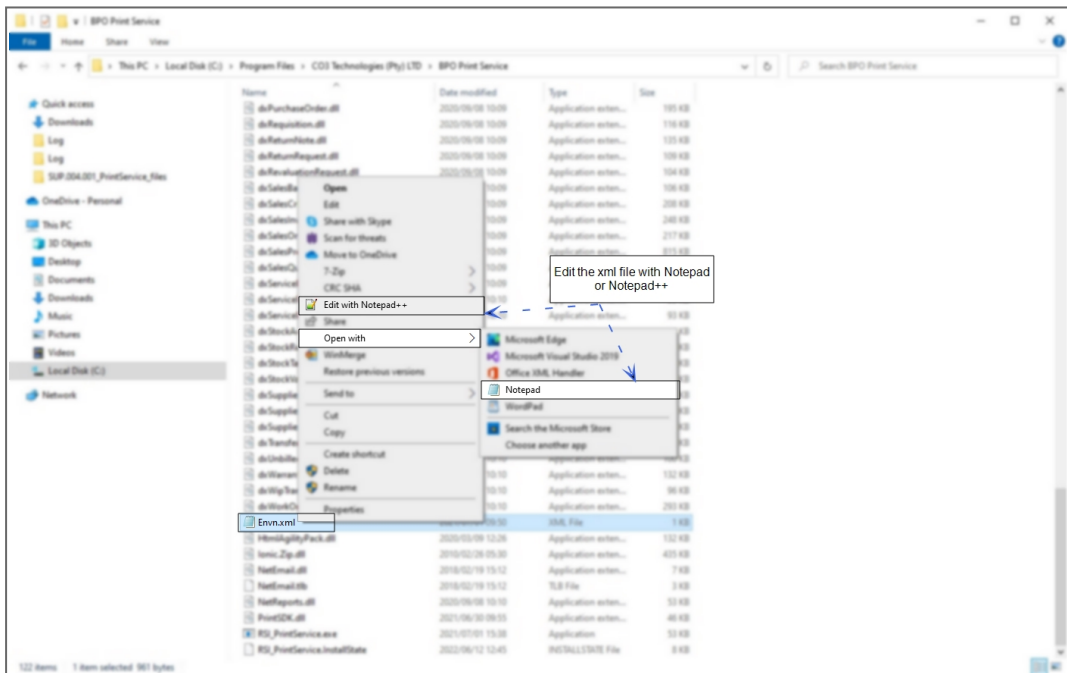
1. In your File Explorer, search for the following file location:

**C:\Program Files\CO3 Technologies (Pty) LTD\RSI Print Service**

- Right click on the **Envn.xml** file.



- The **File** menu will open.
- Select to either Open with *Notepad* or **Edit with Notepad++** (or any program that will allow editing and saving an xml file).





The xml file will open in the selected program.

Define the following tags:

- **Environment:** as defined for this database, in the **Service Manager**.
- **IntervalAmount** and **IntervaUnit:** The frequency with which the application will be run by Windows Services. In this example I have set the interval to 10 minutes.
- **DomainAuthentication:** True or False depending on whether required for your email server.
- **SmtptAuthentication:** True or False depending on whether required for your email server.
- **EnableSSL:** True or False depending on whether required for your email sever.
- **ReadReceipt:** True or False depending on whether you require the recipient to mark as read.
- **UseCertificate:** True or False depending on whether required for your email sever. If required, ensure the certificate name is noted in the <CertificateName> tag, and is in a folder named Certificates within the Print Service installation folder.
- **ProcessZeroValueInvoices:** True or False depending on whether you want Zero Value Invoices to be printed or emailed to your clients.
- **ZIPFiles:** True or False depending on whether you want the files to be zipped when the number of attachments exceed the number specified in the <ZIPWhenFilesCount> tag.
- **ZIPWhenFilesCount:** This count only needs to be specified when the <ZIPFiles> tag is True.

```

1 <?xml version="1.0" encoding="utf-8" standalone="yes"?>
2 <NewDataSet>
3   <tblEnvironment Sys="PrintService">
4     <Environment:EnvironmentName</Environment>
5     <IntervalAmount>10</IntervalAmount>
6     <IntervalUnit>min</IntervalUnit>
7     <DomainAuthentication>false</DomainAuthentication>
8     <SetupAuthentication>true</SetupAuthentication>
9     <EnableSSL>true</EnableSSL>
10    <ReadReceipt>false</ReadReceipt>
11    <UseCertificate>false</UseCertificate>
12    <CertificateName><!-- Put the full name of the certificate in here including the file type ie certificate.cer--></CertificateName>
13    <ProcessZeroValueInvoices>false</ProcessZeroValueInvoices>
14    <ZIPFiles>true</ZIPFiles>
15    <ZIPWhenFilesCount><!-- This only applies if ZIPFiles is true and if attachments exceed the no. specified-->10</ZIPWhenFilesCount>
16    <TemplateName><!-- Name of the email template that the service must use-->DOCPrintServiceEmail</TemplateName>
17  </tblEnvironment>
18  <tblEnvironment Sys="PrintService">
19    <Environment:EnvironmentName</Environment>
20    <IntervalAmount>10</IntervalAmount>
21    <IntervalUnit>min</IntervalUnit>
22    <DomainAuthentication>false</DomainAuthentication>
23    <SetupAuthentication>true</SetupAuthentication>
24    <EnableSSL>true</EnableSSL>
25    <ReadReceipt>false</ReadReceipt>
26    <UseCertificate>false</UseCertificate>
27    <CertificateName><!-- Put the full name of the certificate in here including the file type ie certificate.cer--></CertificateName>
28    <ProcessZeroValueInvoices>false</ProcessZeroValueInvoices>
29    <ZIPFiles>true</ZIPFiles>
30    <ZIPWhenFilesCount><!-- This only applies if ZIPFiles is true and if attachments exceed the no. specified-->10</ZIPWhenFilesCount>
31    <TemplateName><!-- Name of the email template that the service must use-->DOCPrintServiceEmail</TemplateName>
32  </tblEnvironment>
33 </NewDataSet>
34

```

- Multiple environments are configured by setting up additional <Environment> tags within the main <dsEnvironments> tag.

## CONFIGURE SCHEDULED TASK

BPO Service Console Applications run automatically through Windows Services at the interval defined in the Environment file. This interval should be defined by the frequency invoice and credit notes are created throughout the day, and depends on your company's requirements, e.g., every 30 minutes.

## RUN APPLICATION AND CHECK LOGS

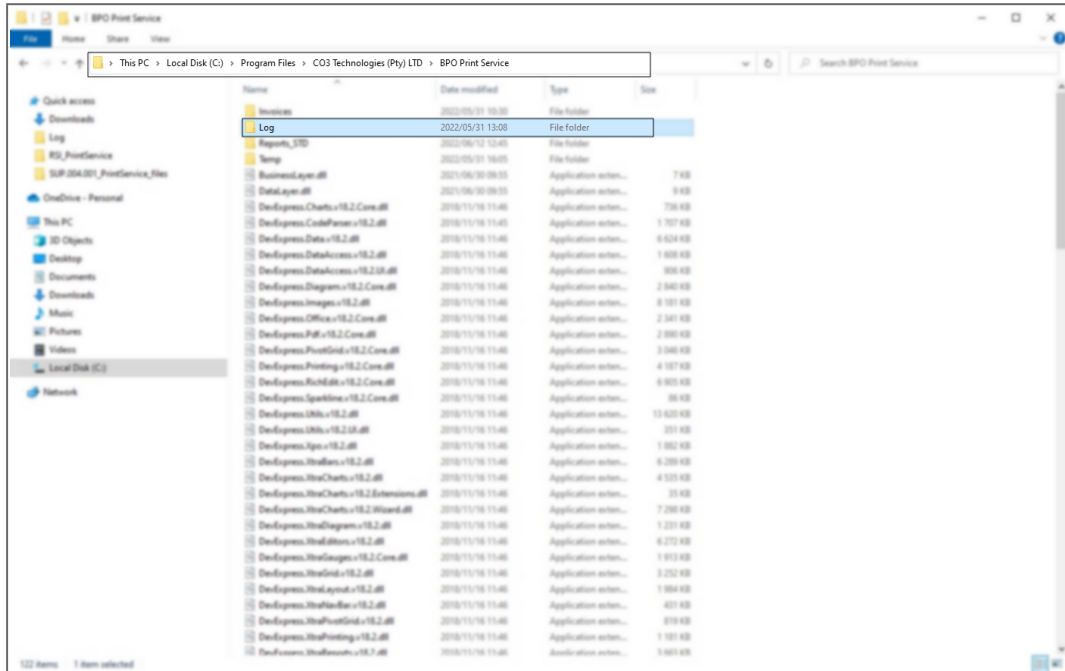
Running the application after installation and configuration is important, in order to ensure all configuration has been done correctly.



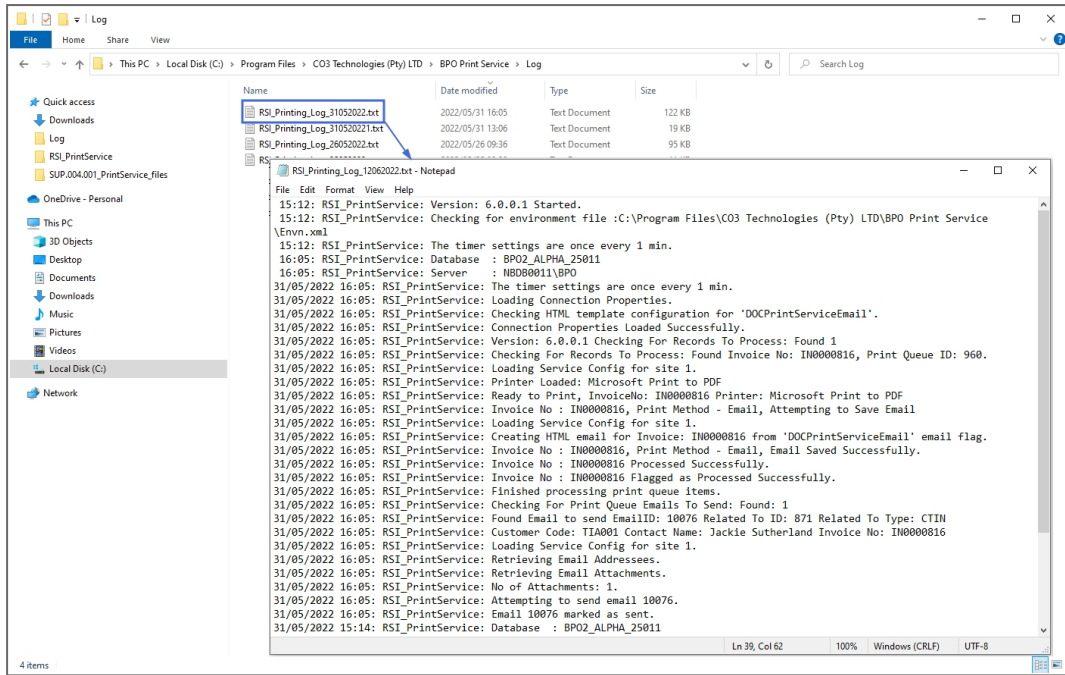
Refer to **"Start a service"** on page 1 for more information relating to starting a Windows Service.

After running the application check the application's log to ensure the application is running correctly.

- Browse to the application's installation folder.
- Log text files are generated by date within the **Log** folder.



- Open the Log file generated for the corresponding date.
- Check that connection was successful, and that there are no errors in the log.
- Resolve any issues until the log file is clear of errors.



- It is recommended that you check the log files the following day to make sure the Scheduled Task fired that there are no errors in the log.
- This application can now be left to run via the Windows Scheduled Task.
- Review the log if any issues arise on BPO related to this functionality.

## Related Topics

- [Print Queue](#)
- [Print Queue Reprint](#)
- [Print Queue Viewer](#)

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