



c360 Reminder User Guide

Microsoft Dynamics CRM 4.0 compatible

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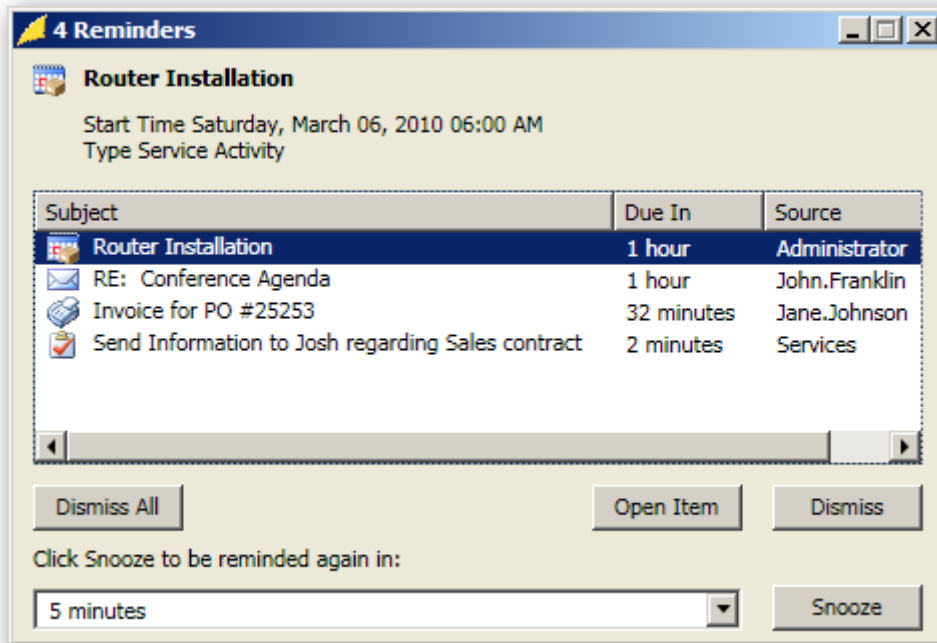
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c360 Reminder

Overview

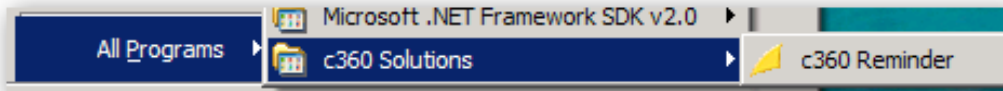
c360 Solutions Reminder is a Microsoft CRM enhancement that notifies Microsoft CRM users of any upcoming activities and appointments. Reminder lets you monitor any combination of users and/or queues and activity types, enabling users to monitor queues and other members in a team. Features include:

- 1) Monitor all or a subset of activities
- 2) Configure how long in advance to be notified of each activity type
- 3) Monitor any queues and / or users
- 4) Set snooze for each activity, to be reminded again in a certain amount of time
- 5) Configure how frequently the reminders appear
- 6) Identify quickly who owns the activity (queue or user)
- 7) No requirement to have CRM open
- 8) Supports multiple languages and works with IFD.



Accessing c360 Reminders

Reminders can be started automatically on start up or from the program menu:



When c360 Reminders is running, an icon will appear in the system tray:

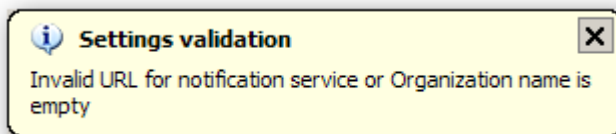


Right-clicking on the icon offers the following options:

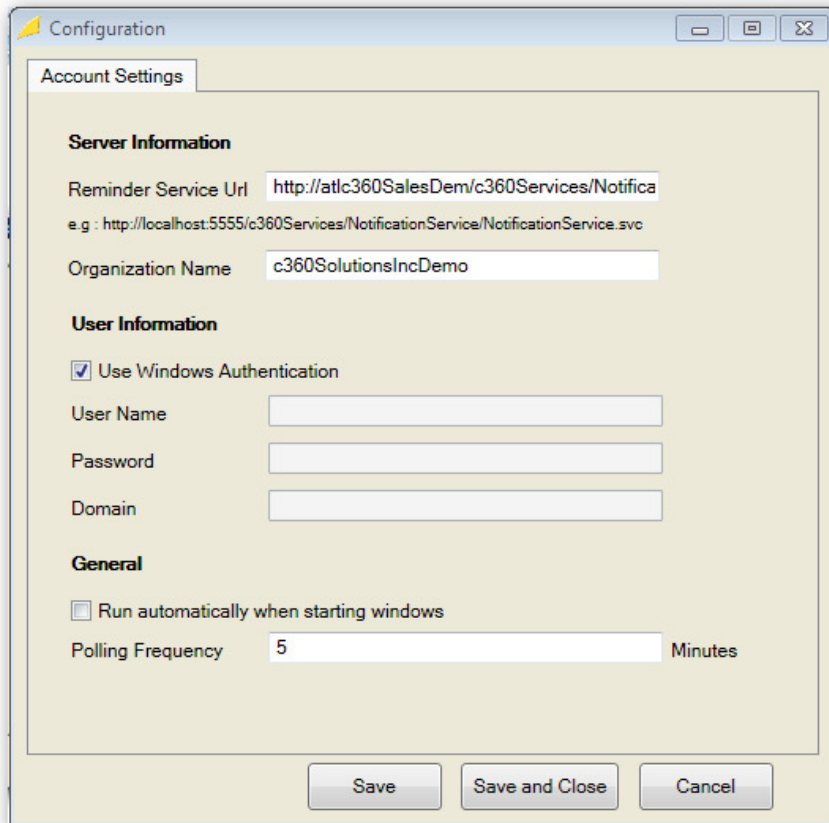
- 1) Configurations
- 2) Preferences
- 3) Notifications
- 4) Exit

Configuring c360 Reminders

c360 Reminders must be configured the first time it is launched. Upon launching the application for the first time, a reminder will appear showing that the Organization name and URL are invalid:



along with the configuration screen:

A screenshot of a Windows-style configuration window titled 'Configuration'. The 'Account Settings' tab is selected. The window is divided into three sections: 'Server Information', 'User Information', and 'General'.
- **Server Information:** 'Reminder Service Url' is set to 'http://atlc360SalesDem/c360Services/Notifica' with a sub-note 'e.g.: http://localhost:5555/c360Services/NotificationService/NotificationService.svc'. 'Organization Name' is set to 'c360SolutionsIncDemo'.
- **User Information:** 'Use Windows Authentication' is checked. There are empty text boxes for 'User Name', 'Password', and 'Domain'.
- **General:** 'Run automatically when starting windows' is unchecked. 'Polling Frequency' is set to '5' with the unit 'Minutes'.
At the bottom are three buttons: 'Save', 'Save and Close', and 'Cancel'.

To configure the product, enter the correct values to the Account Settings tab in the configuration screen, as outlined below:

Server Settings

- 1) '*Notification Service URL*': This is the endpoint the Reminder client uses to communicate with the CRM Server.

Note: When navigating from inside to outside the network (IFD), the URL will need to be changed to reflect the IFD URL.

- 2) '*Organization Name*': This is the name of the organization to which the client is subscribing.

Note: The c360 Client can only subscribe to one organization at a time.

User Information

- 3) '*Use Windows Authentication*': This should be checked when in network. The credentials used to log into the workstation will be used to communicate with CRM.



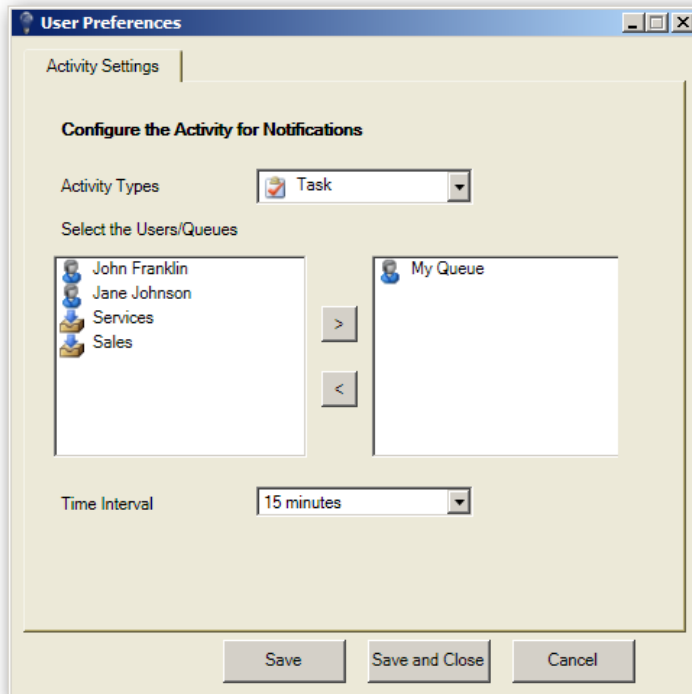
- 4) '*User Name / Password / Domain*': Fill in this information when you are outside the network (IFD).
Note: This option can be used when in network to impersonate a different user.

General

- 5) '*Run automatically...*': When this option is checked, c360 Reminder will start when the workstation is turned on.
- 6) '*Polling Frequency*': This determined how often the reminder service will check for any activities.

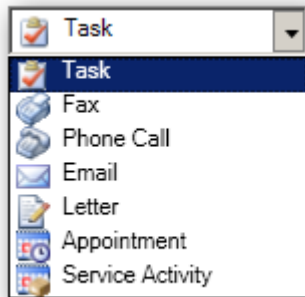
Setting Preferences

C360 Reminder allows users to set preferences for each activity in CRM, including which users and queues the user would like to be notified, as well as the amount of forewarning given for each activity.

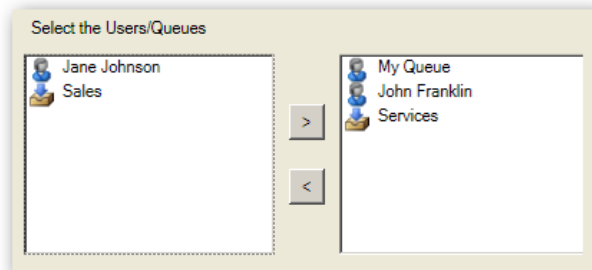


When clicking 'preferences', the preferences screen is displayed.

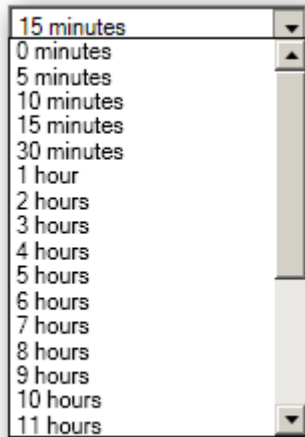
1) Choose the activity to be configured:



2) Select the users and / or queues to monitor.

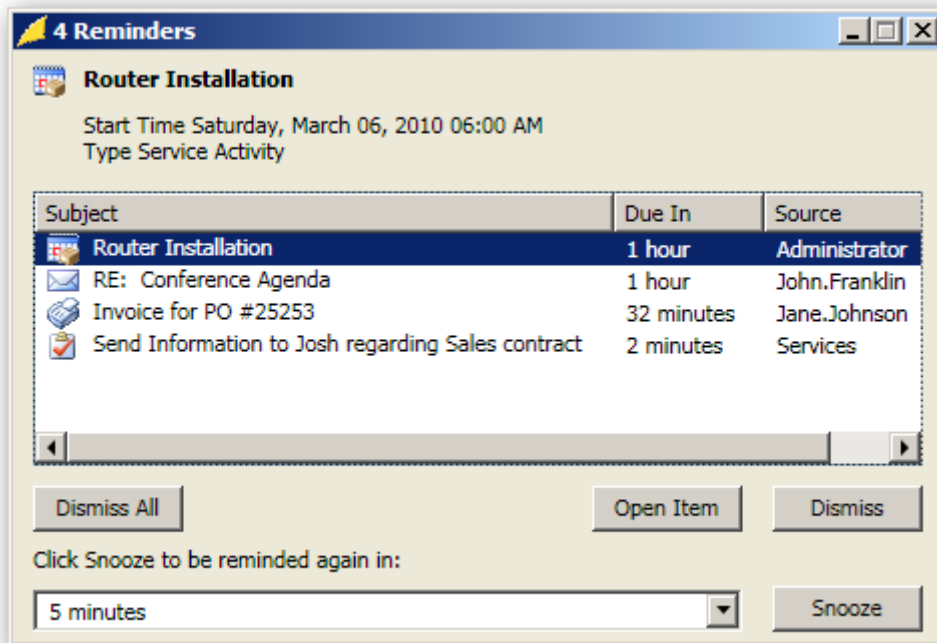


3) Select the time interval for the activity (for example, if the time interval is set to 15 minutes for tasks, then the user will be notified about a task until 15 minutes before it is due).



Reminders

Reminders will appear in the form of a dialog with the same feel and functionality of Microsoft Outlook, as seen in figure



Selecting on an item will show pertinent information at the top of the dialog, including the exact start date and time and type of activity. The following actions can then be taken on that item (or items):



- 1) '*Dismiss All*' – this will dismiss the reminders for all items currently visible so that the user will not be notified of them again.
- 2) '*Open Item*' – highlight a selection and click 'Open Item' will open the activity in a CRM window
- 3) '*Dismiss*' – the same as 'Dismiss All', but only affects the chosen selection
- 4) '*Source*' – the owning user or queue for the item selected
- 5) '*Snooze*' – choose how long before the user is reminded of the action again.

Note: by holding down the shift key, the user can take action on multiple items