



Alert Reminder Boost 3.0

User Guide

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Our web site: <http://www.boostsolutions.com>

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1. Introduction

SharePoint Alert Reminder Boost is a powerful alert and reminder tool that sends out detailed, fully-customizable email and SMS messages. Alerts are event-triggered and emails and SMS messages are sent out whenever an item is created, modified or deleted. Reminders are time-triggered and reminders can be sent automatically based on customizable intervals.

This user guide is used to instruct and guide the users to configure and use Alert Reminder Boost.

For the latest copy of this and other guides, please visit:

<http://www.boostsolutions.com/download-documentation.html>

2. Installation

2.1 Product Files

After you download and unzip the Alert Reminder Boost file from www.boostsolutions.com, you will find the following files:

Path	Descriptions
Setup.exe	A program that installs and deploys the WSP solution packages to the SharePoint farm.
EULA.rtf	The product End-User-License-Agreement.
Alert Reminder Boost_V3_User Guide.pdf	User guide for Alert Reminder Boost in PDF format.
Condition User Guide.pdf	User guide for Condition component in PDF format.
Migration Tool.exe	A tool that helps you to migrate your Alert Reminder Boost settings from Version 2.0 to Version 3.0.
Library\2.0\Setup.exe	The product installer for .Net Framework 2.0.
Library\2.0\Setup.exe.config	A file containing the configuration information for the installer.
Library\4.0\Setup.exe	The product installer for .Net Framework 4.0.
Library\4.0\Setup.exe.config	A file containing the configuration information for the installer.
Solutions\Foundation\BoostSolutions.FoundationSetup12.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2007 or WSS 3.0.
Solutions\Foundation\BoostSolutions.FoundationSetup14.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Foundation\BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\AlertReminder\BoostSolutions.AlertReminderSetup14.3.wsp	A SharePoint solution package containing Alert Reminder Boost files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\AlertReminder\BoostSolutions.AlertReminderSetup15.3.wsp	A SharePoint solution package containing Alert Reminder Boost files and resources for SharePoint 2013 or SharePoint Foundation 2013.

2.2 Software Requirements

Before you install Alert Reminder Boost, ensure your system meets the following requirements:

SharePoint 2013

Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2008 R2 SP1
Server	Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013 Microsoft .NET Framework 4.5
Browser	Microsoft Internet Explorer 8 or above Mozilla Firefox Google Chrome

SharePoint 2010

Operating System	Microsoft Windows Server 2008 x64 Microsoft Windows Server 2008 R2
Server	Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010 Microsoft .NET Framework 3.5
Browser	Microsoft Internet Explorer 7 or above Mozilla Firefox Google Chrome

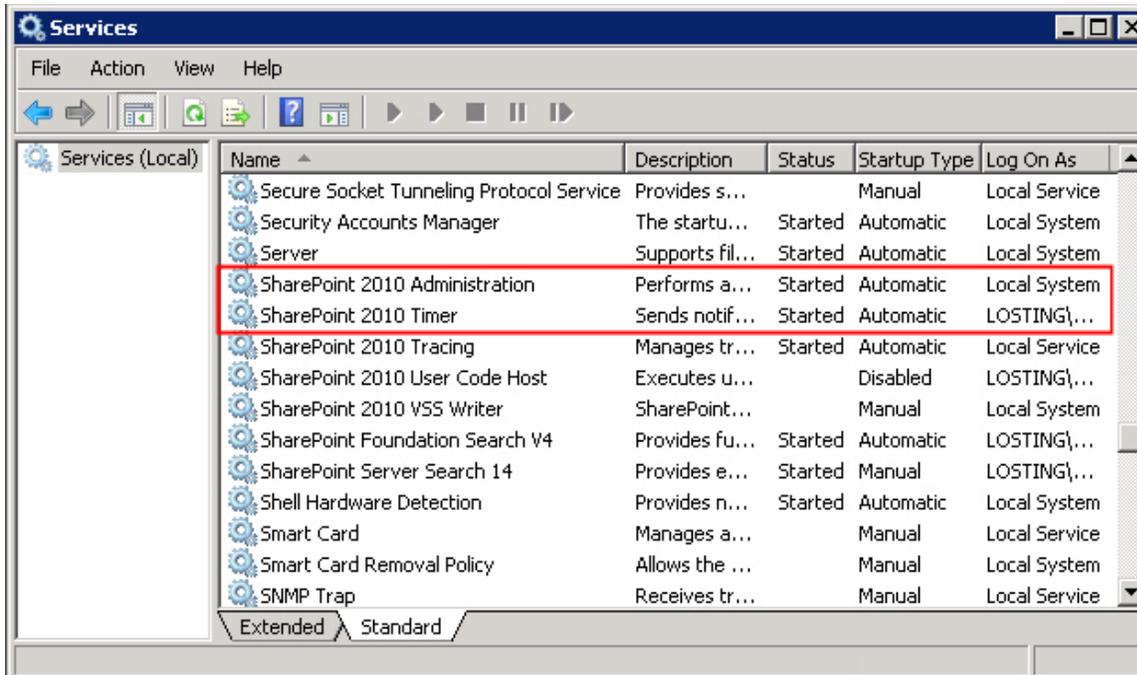
2.3 Installation

Follow these steps to install Alert Reminder Boost on your SharePoint servers.

Note During installation, the **SharePoint Timer** service will be restarted automatically.

Installation Preconditions

Before you start installing Alert Reminder Boost, please make sure these services are started on your SharePoint servers: **SharePoint Administration** and **SharePoint Timer**.



Alert Reminder Boost must be run on one front-end Web server in the SharePoint farm where **Microsoft SharePoint Foundation Web Application services** are running. Check **Central Administration → System Settings** for a list of servers running this service.

Required Permissions

To perform this procedure, you must have the following specific permissions and rights:

- Member of the local server's **Administrators** group.
- Member of the **Farm Administrators** group.

To install Alert Reminder Boost on SharePoint server

- a. Download the Alert Reminder Boost zip file (*.zip) from the BoostSolutions website and extract the file.
- b. Open the created folder and run the **Setup.exe** file.

Note If you cannot run the setup file, please right click the **Setup.exe** file and choose Run as administrator.

- c. A system check is performed to verify if your machine meets all the requirements for installing the product. After the system check is finished, click **Next**.
- d. Review and accept the End-User License Agreement and click **Next**.
- e. In the **Web Application Deployment Targets**, select the web applications you are going to install and click **Next**.

Note If you select **Automatically activate features**, the product features will be activated in the target site collection during the installation process. If you want to manually activate the product feature later, uncheck this box.

- f. Upon completion of the installation, details are displayed showing which web applications your product has been installed to. Click **Close**.

2.4 Upgrade

Download the latest version of Alert Reminder Boost and run the **Setup.exe** file.

In the **Program Maintenance** window, select **Upgrade** and click **Next**.

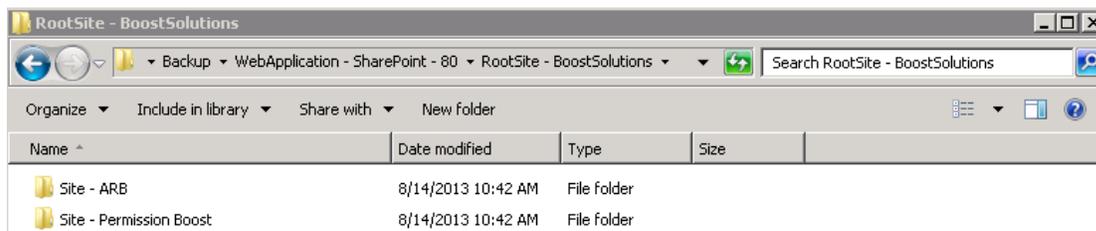
Note During product upgrade, the **SharePoint Timer** service will be restarted automatically.

If you upgrade the product from Version 2.0 to Version 3.0, in the **System Check** Window, you will get a warning: *An older version of Alert Reminder is detected. Please run the migration tool to migrate your data settings to the new version after the setup is finished.*

To Migrate Alert Reminder Boost Settings from Version 2.0 to Version 3.0

- a. Open the product folder and run the **Alert Reminder Boost Settings Migration Tool.exe** file.
- b. A Welcome window will open, click **Next** to continue.
- c. A system check is performed to verify if your machine meets all the requirements for using this tool. After the system check is finished, click **Next** to proceed with the migration tool.
- d. In the **Migration Targets** window, select the web applications you are going to migrate settings for and click **Next**.
- e. Wait until all the operations are successfully completed, then click **Next**.
- f. In the **Migration Successfully Completed** window, details are displayed showing which lists with Alert Reminder Boost Settings have been migrated successfully. Click **Close**.

After the Migration, your Alert Reminder Items settings will be saved as XML files in the Backup folder as a backup. And you can find the Backup folder in the folder that contains the Migration tool.



2.5 Uninstallation

If you want to uninstall Alert Reminder Boost, double-click the **Setup.exe** file.

In the **Repair or Remove** window, select **Remove** and click **Next**. The application will be removed.

2.6 Command_Line Installation

The following instructions are for installing the solution files for Alert Reminder Boost using the SharePoint STSADM command line tool.

Open the STSADM command line tool on the SharePoint server.

- **SharePoint 2013**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\15\BIN\stsadm.exe

- **SharePoint 2010**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\BIN\stsadm.exe

Required permissions

To use STSADM, you must be a member of the local Administrators group on the server.

To install Alert Reminder Boost to SharePoint servers.

- Extract the files from the product zip pack to a folder on one SharePoint server.
- Open a command prompt and make sure your path is set with the SharePoint bin directory.

- **SharePoint 2010**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\BIN

- **SharePoint 2013**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\15\BIN

- Add the solution files to SharePoint in the STSADM command line tool.

```
stsadm -o addsolution -filename BoostSolutions.AlertReminderSetup14.3.wsp
```

```
stsadm -o addsolution -filename BoostSolutions.FoundationSetup14.1.wsp
```

- Deploy the added solution with the following command:

```
stsadm -o deploysolution -name BoostSolutions.AlertReminderSetup14.3.wsp -
```

```
allowgacdeployment -url [virtual server url] -immediate  
stsadm -o deploysolution -name BoostSolutions.FoundationSetup14.1.wsp -allowgacdeployment  
-url [virtual server url] -immediate
```

- e. Wait for the deployment to complete. Check the final status of the deployment with this command:

```
stsadm -o displaysolution -name BoostSolutions.AlertReminderSetup14.3.wsp  
stsadm -o displaysolution -name BoostSolutions.FoundationSetup14.1.wsp
```

The result should contain a <Deployed> parameter for which the value is TRUE.

- f. In the STSADM tool, activate the features.

```
stsadm -o activatefeature -name SharePointBoost.AlertReminder -url [site collection url] -force  
stsadm -o activatefeature -name SharePointBoost.AlertReminder.TimerJob -url [virtual server url] -  
force
```

To remove Alert Reminder Boost from SharePoint servers.

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.AlertReminderSetup14.3.wsp -immediate -url  
[virtual server url]
```

- b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

```
stsadm -o displaysolution -name BoostSolutions.AlertReminderSetup14.3.wsp
```

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the Retraction Succeeded value.

- c. Remove the solution from the SharePoint solutions storage:

```
stsadm -o deletesolution -name BoostSolutions.AlertReminderSetup14.3.wsp
```

To remove BoostSolutions Foundation from SharePoint servers.

BoostSolutions Foundation is mainly designed to provide a centralized interface to manage licenses for all BoostSolutions software from within SharePoint Central Administration. If you are still using BoostSolutions product on your SharePoint server, please do not remove Foundation from the servers.

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.FoundationSetup14.1.wsp -immediate -url  
[virtual server url]
```

- b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

```
stsadm -o displaysolution -name BoostSolutions.FoundationSetup14.1.wsp
```

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

- c. Remove the solution from the SharePoint solutions storage:

```
stsadm -o deletesolution -name BoostSolutions.FoundationSetup14.1.wsp
```

2.7 Feature Activation

Activate features in site collection

By default, the application's features are automatically activated once the product is installed. You can also activate the product feature manually.

- a. On the Site Actions menu  click **Site Settings**.
- b. Under **Site Collection Administration** click **Site collection features**.
- c. Find the application feature and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.



Activate Alert Reminder Timer Job in Central Administration

- a. Using the Quick Launch click **Application Management**.
- b. On the Application Management page, under Manage Applications, click **Manage Web applications**.
- c. Select a web application you want to configure and click **Manage Features** on the ribbon.

- d. Find Alert Reminder Timer feature and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.

**Alert Reminder Timer Job 3.0.821.1**

Automatically send notification e-mails based on a schedule (Powered by BoostSolutions).

[Deactivate](#)**Active**

3. Getting Started with Alert Reminder Boost

After you install Alert Reminder Boost on the SharePoint Server, you will find Alert Reminder Boost on the Ribbon.



Or go to the list settings and find the entry **Alert Reminder Boost** under the **Permissions and Management** section.

Permissions and Management

[Delete this list](#)

[Save list as template](#)

[Permissions for this list](#)

[Workflow Settings](#)

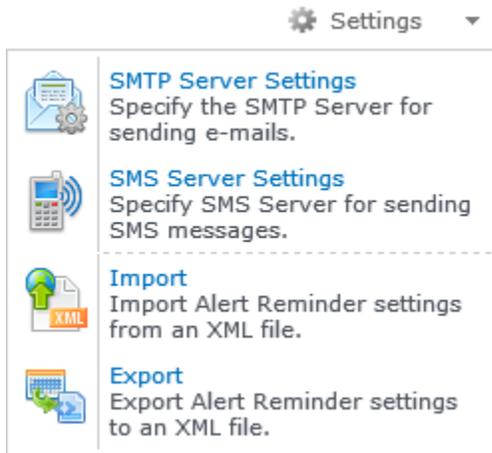
[Alert Reminder Boost \(Powered by BoostSolutions\)](#)

Note To configure Alert Reminder Boost settings, you must have at least **Design** Permission level.

Using either method, enter the Alert Reminder Boost Settings page. On this page, you can manage Alert and Reminder items. There are two tabs, one for Alert and one for Reminder. You can view the following information for Alert or Reminder on this page: Title, Delivery Method, Status, Modified, and Modified By.

Alert		Reminder			Settings
Title	Delivery Method	Status	Modified	Modified By	
Alert	E-Mail	Active	8/7/2013 3:48:12 PM	System Account	
+ Add new alert item					
BoostSolutions Alert Reminder Boost v3.0.807.0					

To the right of the Alert and Reminder tabs, there is a settings drop-down menu which contains the following settings:



SMTP Server Settings: Specify the SMTP Server for sending e-mails.

SMS Server Settings: Specify the SMS Server for sending SMS messages.

Import: Import Alert and Reminder settings from an XML file.

Export: Export Alert and Reminder settings to an XML file.

4. Configuring an Alert Item

To configure an alert item, click Add new alert item to open the New Alert Item page. You will need to set-up the following basic settings:

Alert Title
Enter a title for this alert item.

Alert Status
Specify the status of this alert item. If the status is disabled, the alert e-mail will not be sent.

Enabled Disabled

Delivery Method
Specify which method you want to use to deliver a message.

E-Mail SMS Message

Alert Title: Enter a name for the alert item. This field is required.

Alert Status: The Alert Status options controls whether the alert is enabled or disabled. New alert items are enabled by default.

Delivery Method: Select the method you want to use to deliver a message, E-mail or SMS Message.

The New Alert Item page also contains the following 4 tabs for configuring the new alert item: **Event, Message, External Path and Note.**

4.1 Event

There are 3 sections in the **Event** Tab: Change Type, When to Send Alerts and Which Items Generate Notifications.

Change Type

In this section, you can specify events that generate an alert. There are four options for you to choose from: On all changes, When new items are added, When existing items are modified and When items are deleted.

Change Type
Specify the type of changes that you want to be alerted to.

Alert me:

On all changes

When new items are added

When existing items are modified

When items are deleted

On all changes: An alert will be generated when any changes are made to an item in the list.

When new items are added: An alert will be generated when an item is created in the list.

When existing items are modified: An alert will be generated when an item in the list is modified.

When items are delete: An alert will be generated when an item in the list is deleted.

When to Send Alerts

In this section you can specify how often alert e-mails are sent. There are three options for you to choose from: Send notification immediately, Send a daily summary and Send a weekly summary.

Send notification immediately
 Send a daily summary
 Send a weekly summary

Time:
Sunday ▼ 8:00 AM ▼

Maximum number of items per summary
50

Send notification immediately: Send a notification as soon as items are changed.

Send a daily summary: Send a notification every day at a specified time.

Send a weekly summary: Send a notification every week at a specified day and time.

If you choose to send a daily or weekly summary, you can set a **Maximum number of items per summary**.

Note For SMS Messages, you can only select Send notification immediately.

Which Items Generate Notifications

In this section you can select which items will generate an alert. There are three options for you to choose from: All items, Item from List View and Items with conditions.

All Items: All items in the current list.

All Items Items in a List View Items with conditions

Item from List View: Items in a specified list view.

All Items Items in a List View Items with conditions

Due Today ▼

Items with conditions: Items that meet certain conditions. In the Condition Type menu, select either Basic or Advanced from the drop down list.

Basic Mode:

All Items Items in a List View Items with conditions

Condition Type: Basic ▾

And

[Due Date] is less than [Today] ✕

Advanced Mode:

All Items Items in a List View Items with conditions

Condition Type: Advanced ▾

```
AddDays([Today],2)==[Due Date]
```

✔
📄 x= fx +-=

Note For more information about conditions, please refer to the **Condition User Guide**.

4.2 Message

In the Message tab, you can configure the Alert notification email or SMS message.

Note: The configuration settings for Emails and SMS Messages are different.

E-Mail Header

The E-Mail Header allows you to specify the Alert notifications: sender, recipient, CC and Bcc fields, persons you wish to exclude from receiving this notification and subject.

Note: For SMS Messages, only the **To...** and **Exclusion...** fields are available for configuration.

E-Mail Header

From...	
To...	
CC...	
BCC...	
Exclusion...	
Subject...	

From...	Specify the email Sender. For more information please refer to: Specify the Sender.
To..., CC... and BCC...	Specify the Recipient, CC and BCC fields. For more information please refer to: Specify the Recipient, CC and BCC Fields.
Exclusion...	Specify the persons you want to exclude from receiving this Alert email. For more information please refer to: Specify the Persons you want to Exclude.
Subject...	Set the Subject for the Alert Notification email. For more information please refer to: Set the Email Subject.

Specify the Sender

Click the **From...** button to configure the email sender. A dialog box will appear. In the dialog box, you can specify the **Display Name**, **E-Mail Address** and **Reply to E-Mail Address**. You can select the **Send Test E-mail** to send an email to test if the alert email can be sent successfully.

Note: If you have configured the Sender in the SMTP Settings, you do not need to configure the Sender in the E-Mail header. If the Sender you enter is different from the SMTP Settings, users will get the following email header:

Carol is the Sender in the SMTP Settings.

Alert : (Modified)

■ Carol <Carol@boostsolutions.com> on behalf of □ Brandon <Brandon@boostsolutions.com>

Brandon is the Sender in the E-Mail Header

Specify the Recipient, CC and BCC Fields

The settings for the Recipient, CC and BCC fields are the same. We will use the **To...** field as an example.

First click **To...** and a dialog box will appear.

In the **Select Users** section, you can enter users and groups names as recipients.

Select Users

Enter user names and group names; separate them with semicolons (;).

In the **Select Person/Group Column** section, you can select a column that contains a Person/Group as the recipient from the current list. Or, you can enable the **Get users from external list columns**, and select the column that contains the Person/Group in the external list.

Select Person/Group Column

Select user column.

Person or Group Columns

Current list columns (containing Lookup columns)

- Created By
- Modified By
- Predecessors.Created By
- Predecessors.Modified By

External list columns

- Get users from external list columns

Site (click to edit)	List	Columns	
Foundation10-7777	Announcements	Created By	Delete

Add external list column

In the **Specify E-Mail Address** section, you can input email addresses directly or insert columns that contain email addresses.

Specify E-Mail Addresses

Specify e-mail addresses or columns containing e-mail addresses, separating multiple addresses with a comma (,) or semicolon (;).

E-mail addresses or columns containing e-mail addresses

Sandy@boostsolutions.com

[Insert column...]

Specify the Persons you want to Exclude

First click **Exclusion...** and a dialog box will appear. In the dialog box you can enter user and group names directly in the **Select Users** section or you can input the email addresses you want to exclude directly in the **E-Mail Address Section**.

Exclusion

Select Users
Enter user names and group names; separate multiple names or group names with semicolons (;).

Users/Groups
PERFORMANCE\Administrator ;

E-Mail Address
Specify e-mail addresses; separate multiple addresses with a comma (,) or semicolon (;).

E-mail address

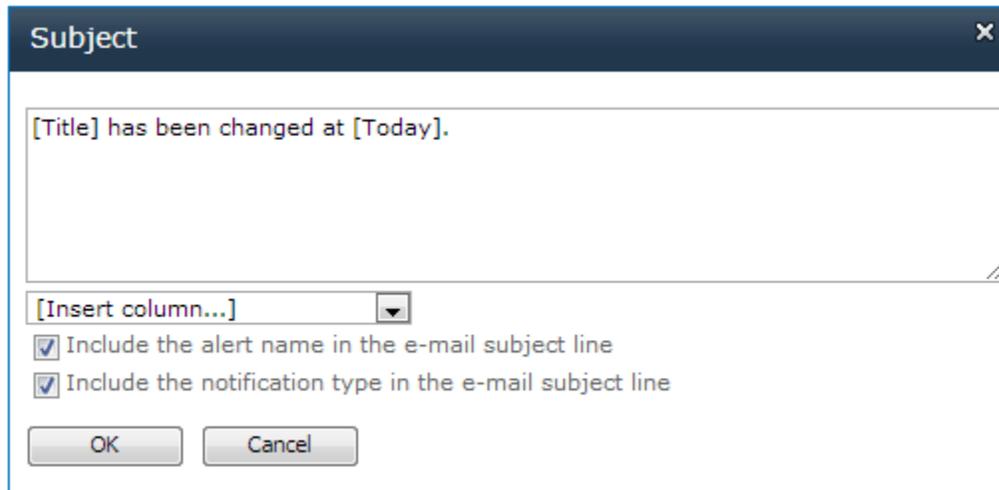
OK Cancel

Set the Email Subject

First click **Subject...** and a **Subject** dialog box will appear. In the dialog box you can enter a subject according to your needs or company policy. You can also insert a column from the current list into the subject line as well.

Include the alert name in the e-mail subject line: Select this option to add the alert name to the subject line.

Include the notification type in the e-mail subject line: Select this option to add the notification type (**Add, Modify or Delete**) to the subject line.



Subject

[Title] has been changed at [Today].

[Insert column...]

Include the alert name in the e-mail subject line

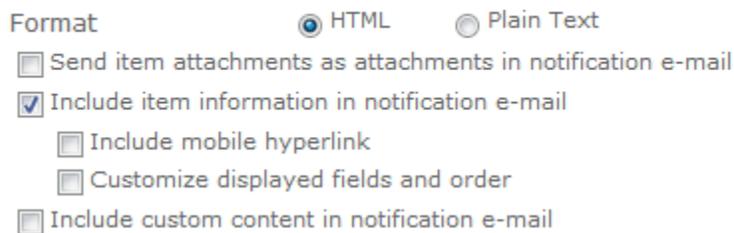
Include the notification type in the e-mail subject line

OK Cancel

E-Mail Body

The E-Mail Body section allows you to set up the email itself.

E-Mail Body



Format HTML Plain Text

Send item attachments as attachments in notification e-mail

Include item information in notification e-mail

Include mobile hyperlink

Customize displayed fields and order

Include custom content in notification e-mail

Format: You can select either **HTML** or **Plain Text**.

Send Item attachments as attachments in notification e-mail: If the modified list item contains an attachment, you can select this option to attach it to the notification email.

Include item information in notification e-mail: Enable this option to include item information in the notification email. You can select **Include mobile hyperlink** to display the mobile hyperlink in the notification email. Select **Customize displayed fields and order** to customize which columns will be displayed in the notification email, as well as the columns order.

Event	Message View	External Path	Note
-------	--------------	----------------------	------

External Path

Using default host path
 Select alternate access mappings
 Enter a new site collection's URL

4.4 Note

The note tab allows you to send an email notification to select users informing them of new Alert items. Note is optional and is only for email messages.

Event	Message	External Path	Note
-------	---------	---------------	-------------

You can send an email notification to select users informing them of new Alert emails.

Send a note informing users every time you click OK in the New/Edit Alert Item Page.
 Send a note that will appear at the top of a Alert email.

Note

B *I* U ABC | Styles | Paragraph | Font family | Font size

[Rich text editor toolbar with icons for bold, italic, underline, list, link, unlink, anchor, image, video, audio, table, etc.]

An Alert Item in your Tasks list is created or modified.

Path: p Words: 11

[Insert column...]

Send a note informing users every time you click OK in the New/Edit Alert Item Page: Select this option to send notification emails to users every time you create a new alert item or modify an alert item.

Send a note that will appear at the top of an Alert email: Select this option to combine a Note and Alert email into one email. The note will appear at the top of the Alert email.

Note: Type the note and insert list columns into the note message. Bold, italic, colored fonts and other text formatting are supported.

5. Configuring a Reminder Item

To configure a Reminder, click Add new reminder item to open the New Reminder Item page. You will need to set-up the following basic settings:

Reminder Title Enter a title for this reminder item.	<input type="text" value="Reminder"/>
Reminder Status Specify the status of this reminder item. If the status is disabled, the reminder e-mail will not be sent.	<input checked="" type="radio"/> Enabled <input type="radio"/> Disabled
Delivery Method Specify which method you want to use to deliver a message.	<input checked="" type="radio"/> E-Mail <input type="radio"/> SMS Message

Reminder Title: Enter a name for the reminder. This field is required.

Reminder Status: The Reminder Status options controls whether the reminder is enabled or disabled. New Reminders are enabled by default.

Delivery Method: Select the method you want to use to deliver a message, E-mail or SMS Message.

The New Reminder Item page also contains the following 4 tabs for configuring the new Reminder:

Schedule, Message, External Path and Note.

5.1 Schedule

In the Schedule tab, you can specify when and how often you want to be reminded. There are two section in the Schedule tab: **Recurrence** and **Which Items Generate Notifications**.

Recurrence

In this section, you can specify how often and when you want to be reminded. There are three options for you to configure: **Pattern, Date Range** and **Time Range**.

Recurrence

Use this section to modify the schedule, specifying when the reminder will run.

- Minutely
- Hourly
- Daily
- Weekly
- Monthly
- Yearly

Pattern

- Every day(s)
- Every workday
 - Sun Mon Tue Wed Thu Fri Sat

Date Range

- Start Date 
- No end date
 - End after: occurrence(s)
 - End by: 

Time Range

Starting every day between

 and no later than

Pattern

There are six time option patterns to choose from: Minutely, Hourly, Daily, Weekly, Monthly, and Yearly.

Minutely	<ul style="list-style-type: none"> <input checked="" type="radio"/> Minutely <input type="radio"/> Hourly <input type="radio"/> Daily <input type="radio"/> Weekly <input type="radio"/> Monthly <input type="radio"/> Yearly <p>Pattern</p> <p>Every <input type="text" value="5"/> minutes</p>
Hourly	<ul style="list-style-type: none"> <input type="radio"/> Minutely <input checked="" type="radio"/> Hourly <input type="radio"/> Daily <input type="radio"/> Weekly <input type="radio"/> Monthly <input type="radio"/> Yearly <p>Pattern</p> <p>Starting every hour between <input type="text" value="1"/> minutes past the hour and no later than <input type="text" value="59"/> minutes past the hour</p>
Daily	<ul style="list-style-type: none"> <input type="radio"/> Minutely <input type="radio"/> Hourly <input checked="" type="radio"/> Daily <input type="radio"/> Weekly <input type="radio"/> Monthly <input type="radio"/> Yearly <p>Pattern</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Every <input type="text" value="1"/> day(s) <input type="radio"/> Every workday <ul style="list-style-type: none"> <input type="checkbox"/> Sun <input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tue <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat

Weekly	<input type="radio"/> Minutely Pattern <input type="radio"/> Hourly <input type="radio"/> Daily <input checked="" type="radio"/> Weekly <input type="radio"/> Monthly <input type="radio"/> Yearly Recur every <input type="text" value="1"/> week(s) on: <input type="checkbox"/> Sun <input checked="" type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat
Monthly	<input type="radio"/> Minutely Pattern <input type="radio"/> Hourly <input type="radio"/> Daily <input type="radio"/> Weekly <input checked="" type="radio"/> Monthly <input type="radio"/> Yearly <input checked="" type="radio"/> Day <input type="text" value="1"/> of every <input type="text" value="1"/> month(s) <input type="radio"/> The <input type="text" value="first"/> day of every <input type="text" value="1"/> month(s)
Yearly	<input type="radio"/> Minutely Pattern <input type="radio"/> Hourly <input type="radio"/> Daily <input type="radio"/> Weekly <input type="radio"/> Monthly <input checked="" type="radio"/> Yearly <input checked="" type="radio"/> Every <input type="text" value="January"/> <input type="text" value="1"/> <input type="radio"/> The <input type="text" value="first"/> day of <input type="text" value="January"/>

Date Range and Time Range

In the Date Range section you can choose from three options: No end date, End after X occurrence(s) or End by a specific date in the Date Range section.

In the Time Range section you can specify the time range to send notification e-mails to select users.

Date Range

Start Date 

No end date
 End after: occurrence(s)
 End by: 

Time Range

Starting every day between

and no later than

Which Items Generate Notifications

The configurations for this section are the same as Alert item.

Please refer to section [Which Items Generate Notifications](#) for more information.

5.2 Message

The configurations for this section are the same as Alert item.

Please refer to section [4.2 Message](#) for more information.

5.3 External Path

The configurations for this section are the same as Alert item.

Please refer to section [4.3 External Path](#) for more information.

5.4 Note

The configurations for this section are the same as Alert item.

Please refer to section [4.4 Note](#) for more information.

6. Manage Alert Reminder Items

The procedure for creating an Alert and Reminder are similar. This section will highlight, step by step, how to: Create an Alert Item, View an Alert Item, Edit an Alert Item, Duplicate an Alert Item, Delete an Alert Item and Deactivate or Activate an Alert Item. You can follow these steps when creating and configuring a Reminder.

6.1 Create an Alert Item

- a. On the Alert Reminder Settings page, select the Alert tab, and then click **Add new alert item**.



There are currently no alert items. To add a new alert item, click "Add new alert item" below.

[+ Add new alert item](#)

BoostSolutions [Alert Reminder Boost](#) v3.0.806.0

- b. In the New Alert Item page enter a title for your Alert item, select if you want to enable this Alert item, and select a Delivery Method.

Alert Title

Enter a title for this alert item.

Alert Status

Specify the status of this alert item. If the status is disabled, the alert e-mail will not be sent.

Enabled Disabled

Delivery Method

Specify which method you want to use to deliver a message.

E-Mail SMS Message

- c. In the Event tab, you need to specify the Alert triggers, when to send Alerts and which items in the list will generate an Alert.

Event	Message	External Path	Note
Change Type Specify the type of changes that you want to be alerted to.		Alert me: <ul style="list-style-type: none"> <input type="checkbox"/> On all changes <input checked="" type="checkbox"/> When new items are added <input checked="" type="checkbox"/> When existing items are modified <input type="checkbox"/> When items are deleted 	
When to Send Alerts Specify how frequently you want to be alerted.		<ul style="list-style-type: none"> <input checked="" type="radio"/> Send notification immediately <input type="radio"/> Send a daily summary <input type="radio"/> Send a weekly summary Time: Thursday ▼ 12:00 AM ▼ Maximum number of items per summary 50	
Which Items Generate Notifications Specify which items in this list will generate alerts. You can configure conditions so that only certain items can generate alerts.		<ul style="list-style-type: none"> <input type="radio"/> All Items <input checked="" type="radio"/> Items in a List View <input type="radio"/> Items with conditions All Tasks ▼	

- d. Select the Message tab to set up email details.

Event	Message View	External Path	Note
E-Mail Header			
From...	Administrator<System@boostsolutions.com> ;System@boostsolutions.com		
To...	[Created By]		
CC...			
BCC...			
Exclusion...	SPBMDISA\administrator		
Subject...	[Title] will due at [Today].		
E-Mail Body			
Format <input checked="" type="radio"/> HTML <input type="radio"/> Plain Text			
<input checked="" type="checkbox"/> Send item attachments as attachments in notification e-mail			
<input checked="" type="checkbox"/> Include item information in notification e-mail <ul style="list-style-type: none"> <input type="checkbox"/> Include mobile hyperlink <input type="checkbox"/> Customize displayed fields and order 			
<input type="checkbox"/> Include custom content in notification e-mail			

- e. In the External Path tab, you can choose a path you want to use.

Event	Message View	External Path	Note
-------	--------------	----------------------	------

External Path

Using default host path

Select alternate access mappings

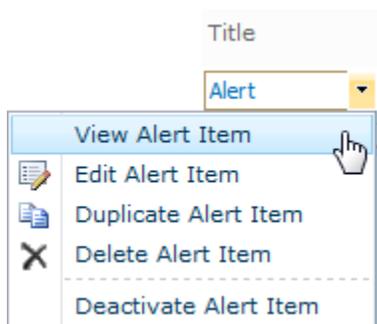
Enter a new site collection's URL

- f. The Note tab is optional. In this tab you can send an email notification to select users informing them of new Alert items.
- g. Click **OK** to save the Alert item.

6.2 View an Alert Item

To View an Alert item, click on the Alert tab and then click on an Alert item. Alternatively you can hover over an Alert item to reveal a drop down menu and then click **View Alert Item**. Once you click on the Alert Item you will enter the View Alert Item page. On this page, you can view all the settings for the Alert item, including basic settings, event settings, condition, message, external path and note.

From the View Alert Item page you can create a new Alert item, enter the edit the Alert item and delete the Alert item.



New alert item
 Edit this alert item
 Delete this alert item
 Back

Basic

Title	Alert
Delivery Method	E-Mail
Status	Active
Last Modified	8/7/2013 5:45:11 PM
Modified By	System Account

Event

Condition

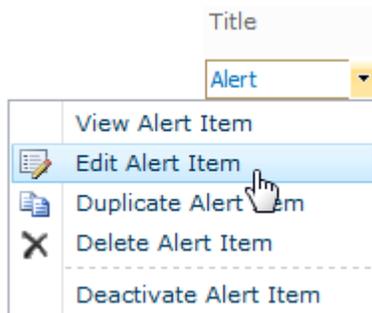
Message

External Path

Note

6.3 Edit an Alert Item

To edit an alert item in the Alert Reminder Boost Settings page, click the **Edit Alert Item** from the drop down menu to enter the Edit Alert Item page. Make your changes and then click **OK** to save the changes.



6.4 Duplicate an Alert Item

Sometimes the most convenient way to create a new Alert item is to duplicate an Alert item, especially if you want to keep similar settings. To duplicate an existing Alert item, hover over an Alert item you want to duplicate to reveal a drop down menu and select **Duplicate Alert Item**. A copy of the Alert item will be created and added to the Alert items list. The title of the new alert will be suffixed with **-copy**. You can change the new duplicated Alert item by editing it.

The screenshot shows the 'Alert' tab selected in the interface. A context menu is open over the 'Alert' item, with 'Duplicate Alert Item' highlighted. Below the menu, a table lists alert items:

Title	Delivery Method	Status	Modified	Modified By
Alert	E-Mail	Active	8/7/2013 5:45:11 PM	System Account
Alert-copy	E-Mail	Inactive	8/7/2013 5:52:56 PM	System Account

Note: The newly created duplicate Alert item will be deactivated by default.

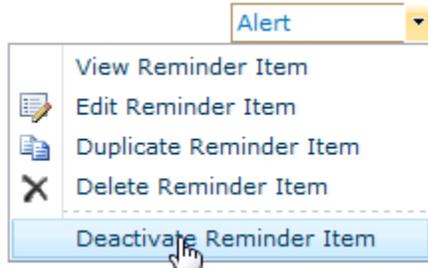
6.5 Delete an Alert Item

To delete an Alert item in the Alert Reminder Boost Setting page, hover over an Alert item you want to delete to reveal a drop down menu and click **Delete Alert Item**. A message box will appear asking if you are sure to delete this alert item. Click **OK** to confirm the deletion.

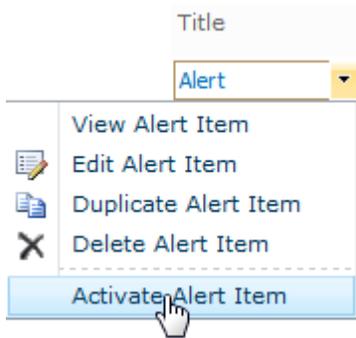
The screenshot shows the 'Alert' tab selected in the interface. A context menu is open over the 'Alert' item, with 'Delete Alert Item' highlighted.

6.6 Deactivate or Activate an Alert Item

To deactivate an Alert item so that an alert will not run or send alert emails, hover over an Alert item you want to deactivate to reveal a drop down menu and select **Deactivate Alert Item**. The status of the Alert item will change to **Inactive**.



To activate an Alert item, hover over an Alert item you want to activate to reveal a drop down menu and select **Activate Alert Item**. The status of the Alert item will change to **Active**.



7. Alert Reminder Boost General Settings

7.1 SMTP Server Settings

The SMTP Server Settings allows you to customize the SMTP settings for Alert Reminder Boost.

Use SharePoint Outgoing E-Mail Settings

Customize Outgoing E-Mail Settings

SMTP domain name or IP address:

Port:

From display name (this will be displayed in the 'From' field of each e-mail):

From address (this will be set as the default 'From address' for each e-mail):

Reply-to address (this will be set as the default 'Reply-to address' for each e-mail):

Authentication

Username:

Password:

Enable SSL/TLS connection

- **SMTP domain name or IP address:** Enter the name or IP address of your email server.
- **Port:** Enter the port number.
- **From display name:** Enter the email display name (optional).
- **From address:** Enter an email address.
- **Reply-to address:** Enter an email address (optional).
- **Authentication:** Enter the user's credentials to connect to your server.
- **Send Test Email:** Send a test email to test if emails can be sent successfully.

Note: There is no need to customize these settings if the SMTP server settings are already configured in SharePoint Central Administration.

7.2 SMS Server Settings

The SMS Server Settings allows you to customize the Test Message Service Settings.

Use web application Text Message (SMS) Service settings

Use customized Text Message (SMS) Service settings

The URL of Text Message (SMS) Service:

https://a

Username:

Boostsolutions

Password:

••••••••

Mobile Phone Number:

13641171889

Test Service

The account is valid.

You can use the default web application Test Message (SMS) Service settings if the SMS Service settings are already configured in the SharePoint web application. Or you can use customized Text Message (SMS) Service settings.

- **The URL of Text Message (SMS) Service:** Specify the URL of the Text Message (SMS) Service to be used when sending notifications.
- **User Name** and **Password:** Enter the User Name and Password to connect to the SMS Server.
- **Mobile Phone Number:** Enter the Phone Number of the mobile that will receive a test message.
- **Test Service:** Click this button to test if the service is available.

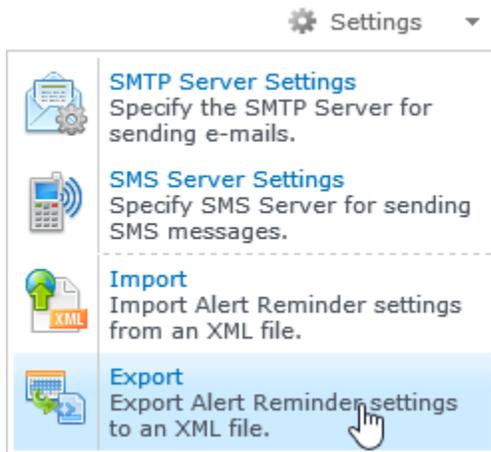
7.3 Export and Import Alert Reminder Items

You can export and import Alert Reminder items as an xml file, as a template or use it on other lists.

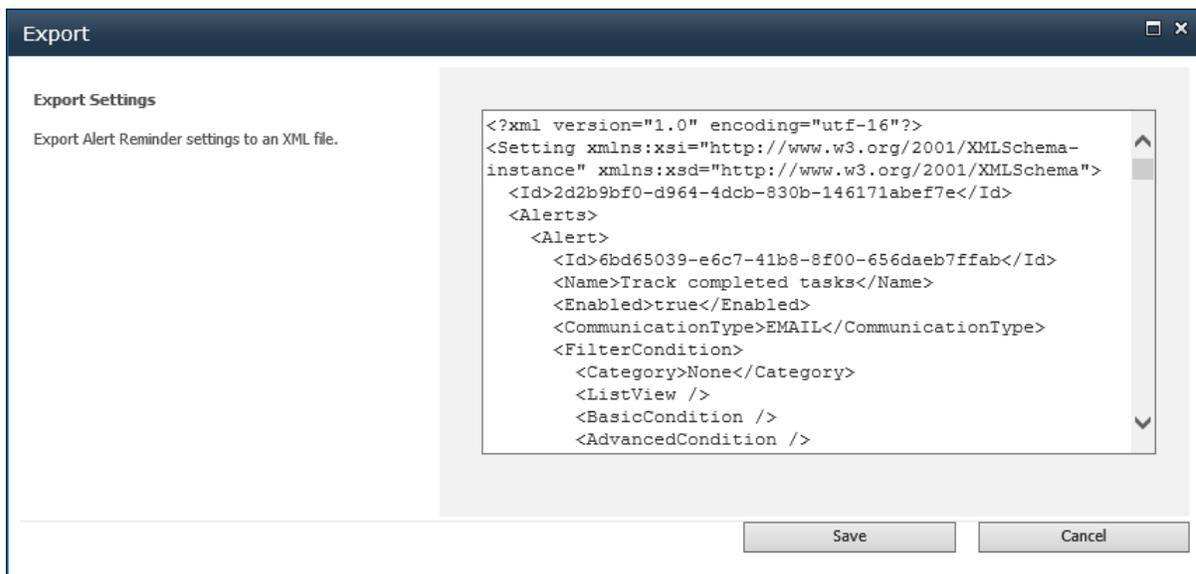
7.3.1 Export

To export Alert Reminder items:

- a. In the Alert Reminder Settings page, click **Export** in the **Settings** drop-down menu.



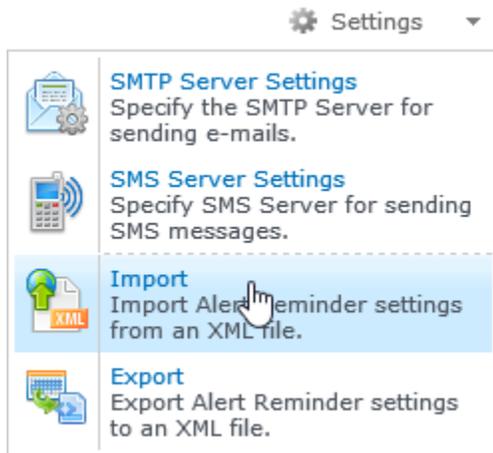
- b. An **Export Settings to XML** dialog box will appear, click **Save** to save the XML file to your local computer.



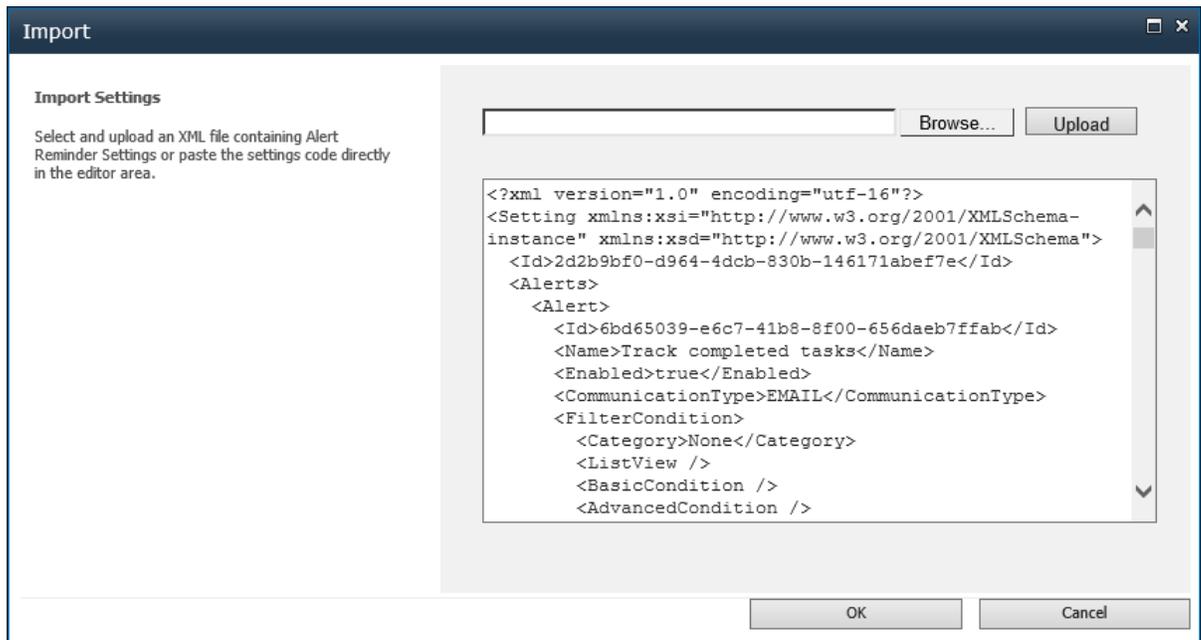
7.3.2 Import

To import Alert Reminder items:

- a. In the Alert Reminder Settings page, click **Import** in the **Settings** drop-down menu.



- b. An **Import** Settings dialog box will appear, click **Browse** to choose a XML file that contains Alert Reminder items or you can paste the code directly.



- c. Click **OK** to import the settings.

8. Use Case

8.1 Set up an Alert on a Tasks List

Suppose you are a project manager, you have created a Tasks list for your team to view their assignments. Every time an item in the Tasks list is created, modified or deleted, you want to send an alert message to the person which the task is assigned to.

Project Name	<input type="checkbox"/> Assigned To	Status	Due Date	<input type="checkbox"/> Created By
Taks1	Nick Simth	Not Started	8/16/2013	Jenny Fowler
Task2	Lucy Green	In Progress	9/13/2013	Jenny Fowler
Task3	Susan Yu	In Progress	9/11/2013	Jenny Fowler

To set up an Alert item for this tasks list, follow these steps:

- Click on the **Alert Reminder Boost** button under the List tab on the ribbon.
- In the Alert Reminder Settings page, click the **Alert** tab and then click **Add new alert item**.
- Fill in the basic settings for this Alert item:

Alert Title: Enter a title for this alert item.

Alert Status: Specify the status of this alert item.

Delivery Method: Specify the method you want to use.

- In the Event tab, you need to make the following configurations:

Change Type: Select **On all changes**.

Change Type

Specify the type of changes that you want to be alerted to.

Alert me:

- On all changes
- When new items are added
- When existing items are modified
- When items are deleted

When to Send Alerts: Select **Send notification immediately**.**When to Send Alerts**

Specify how frequently you want to be alerted.

 Send notification immediately Send a daily summary Send a weekly summary

Time:

Sunday 12:00 AM

Maximum number of items per summary

Which Items Generate Notifications: Select **All Items****Which Items Generate Notifications**

Specify which items in this list will generate alerts. You can configure conditions so that only certain items can generate alerts.

 All Items Items in a List View Items with conditions

- e. In the **Message** tab, specify the sender, recipient, CC and Bcc fields and the subject for the Alert e-mail.

E-Mail Header

From...	Jenny<jenny@boostsolution.com>; jenny@boostsolution.com
To...	[Assigned To]
CC...	
BCC...	
Exclusion...	
Subject...	Your task has been changed at [Today].

E-Mail Body

Format HTML Plain Text

Send item attachments as attachments in the notification e-mail

Include item information in the notification e-mail

Include mobile hyperlink

Customize displayed fields and order

Include custom content in the notification e-mail

- f. Then save the settings.
- g. Now modify an item in the Tasks list to check if the user in the assigned to column can receive the Alert email.
- h. The following is the notification email your team member received. The changes are highlighted and the notification type is displayed in the subject line.

From: Jenny <jenny@boostsolution.com> Sent: Thu 8/8/2013 3:02 PM

To: Nick

Cc:

Subject: Project_Task: Your task has been changed at 8/8/2013 (Modified)

[BoostSolutions >Tasks](#)

[View Task1](#) | [Edit Task1](#) | [View Tasks](#) |

Title:	Task1
Predecessors:	
Priority:	(2) Normal
Status:	Not Started
% Complete:	
Assigned To:	Nick Simth
Description:	
Start Date:	8/8/2013
Due Date:	8/14/2013 8/15/2013
Project Name:	Taks1

Last modified at 8/8/2013 3:02 PM by [Jenny Fowler](#)

8.2 Sending Reminders with an SMS Message

You are the marketing team manager and your team members always forget due dates for important events and tasks, such as turning in sales report, website traffic statistics, etc. Your marketing team members are also often away from the office visiting clients, so they may not check their e-mail box frequently. You want to set up a reminder to send an SMS Message to your team members two days before a due date.

The following is the Tasks list for your marketing team:

Title	Status	Due Date	Priority
Sales Report NEW	Not Started	8/11/2013	(2) Normal
Website traffic statistics NEW	In Progress	8/12/2013	(2) Normal
Quarterly Sales Target NEW	In Progress	8/11/2013	(2) Normal

To set up a Reminder for this list, please follow these steps:

- Click on the **Alert Reminder Boost** button under the List tab on the ribbon.
- In the Alert Reminder Settings page, click the **Reminder** tab and then click **Add new alert item**.

- c. Fill in the basic settings for this Reminder item:

Reminder Title: Enter a title for this reminder.

Reminder Status: Specify the status of this reminder.

Delivery Method: Select SMS Message.

<p>Reminder Title Enter a title for this reminder item.</p>	Marketing_Reminder
<p>Reminder Status Specify the status of this reminder item. If the status is disabled, the reminder e-mail will not be sent.</p>	<input checked="" type="radio"/> Enabled <input type="radio"/> Disabled
<p>Delivery Method Specify which method you want to use to deliver a message.</p>	<input type="radio"/> E-Mail <input checked="" type="radio"/> SMS Message

- d. In the Schedule tab, you need to make the following configurations:

Recurrence: You will send a SMS Message to your team members between 9:00 AM and 10:00 AM every workday with no end date.

<input type="radio"/> By minute <input type="radio"/> Hourly <input checked="" type="radio"/> Daily <input type="radio"/> Weekly <input type="radio"/> Monthly <input type="radio"/> Yearly	<p>Pattern</p> <input type="radio"/> Every <input type="text" value="1"/> day(s) <input checked="" type="radio"/> Every workday <input type="checkbox"/> Sun <input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tue <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat
<p>Date Range</p> <p>Start Date <input type="text" value="8/9/2013"/> </p> <input checked="" type="radio"/> No end date <input type="radio"/> End after: <input type="text" value="10"/> occurrence(s) <input type="radio"/> End by: <input type="text"/> 	
<p>Time Range</p> <p>Starting every day between <input type="text" value="9 AM"/> <input type="text" value="00"/></p> <p>and no later than <input type="text" value="10 AM"/> <input type="text" value="00"/></p>	

Which Items Generate Notifications: From the drop down menu select Advanced and enter the following function: `AddDays([Today],2)=[Due Date]` (two days before the Due Date).

All Items Items in a List View Items with conditions

Condition Type: Advanced ▾

```
AddDays([Today],2)==[Due Date]
```

  $x = fx$ $\frac{+}{x} \div$

- e. In the **Message** tab, specify the recipient and the content of the SMS Message.

Schedule **Message** External Path

Recipients

To...

Exclusion...

Content

- f. Save your settings.
- g. Now create an item in the Tasks list with a Due Date in two days. Your team members will receive the following SMS Message:

Edit **Messages** 

+86 189-0286-7637 10:46
The item "Website traffic statistics" in list >
"Tasks" was la

+86 189-0286-7943 10:46
st modified at 8/12/2013 10:09:25 AM by >
System Account. (You

+86 189-0286-8094 10:46
r task will due in two days.) >

9. Troubleshooting & Support

Troubleshooting FAQ:

<http://www.boostsolutions.com/general-faq.html#Show=ChildTitle9>

Contact Info:

Product & Licensing Inquires: sales@boostsolutions.com

Technical Support (Basic): support@boostsolutions.com

Request a New Product or Feature: feature_request@boostsolutions.com

Live chat:

<http://www.boostsolutions.com/support/chat/livezilla.php?intgroup=U3VwcG9ydA==&reset=true>

Appendix 1: License Management

You can use Alert Reminder Boost without entering any license code for a period of 30 days from when you first use it.

To use the product without limitation after expiration, you will need to purchase a license and register the product.

Finding License Information

1. Navigate to the **BoostSolutions Software Management** section in Central Administration. Then, click **License Management Center** link.
2. Click Download License Information, choose a license type and download the information (Server Code, Farm ID or Site Collection ID).

Download License Information

Download the license type information and send to sales@boostsolutions.com to get license.

Choose a license type

Server License
Server Code: e4c9171bd1aa49cea8903e0a7e0e812643f8360bea74459ca3bf6b2e0240f194

Farm License
Farm ID: {e4c9171b-d1aa-49ce-a890-3e0a7e0e8126}
Number of Users: 24 user(s)

Site Collection License
Site Collection ID: 1316fb72-1436-41cf-949d-56ca6020320e Change
Site Collection: <http://pro-mac>

Download Close

In order for BoostSolutions to create a license for you, you MUST send us your SharePoint environment identifier (Note: different license types need different information). A server license needs a server code; a Farm license needs a farm ID; and a site collection license needs a site collection ID.

3. Send the above information to us (sales@boostsolutions.com) to generate a license code.

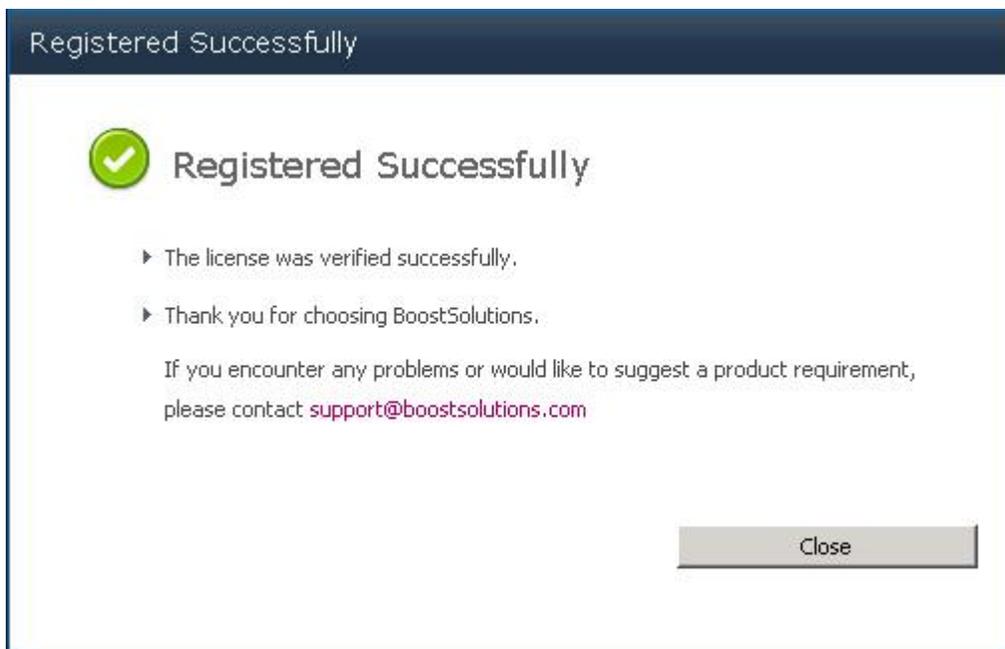
License Registration

1. When you receive a product license code, enter the **License Management Center** page.
2. Click **Register** on the license page and a **Register or Update license** window will open.



The screenshot shows a dialog box titled "Register or Update license". The main text reads: "Please upload a license code file or enter the license code to activate the product." There are two radio button options: "Upload a license code file" (which is selected) and "Enter license code". Under the first option, there is a text input field and a "Browse..." button. Under the second option, there is a larger text input field. At the bottom of the dialog, there are two buttons: "Register" and "Close".

3. Upload the license file or enter the license code and click **Register**. You will get confirmation that your license has been validated.



The screenshot shows a dialog box titled "Registered Successfully". It features a green checkmark icon in a circle. The main text reads: "Registered Successfully". Below this, there are two bullet points: "▶ The license was verified successfully." and "▶ Thank you for choosing BoostSolutions." A paragraph of text follows: "If you encounter any problems or would like to suggest a product requirement, please contact support@boostsolutions.com". At the bottom right, there is a "Close" button.

For more details on license management, see the [BoostSolutions Foundation](#).