



BoostSolutions Alert Reminder App

User Guide

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

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1. Introduction

BoostSolutions' Alert Reminder simplifies the process of setting up a customized alert or reminder flow based on your specifications. This allows for the dispatch of detailed and fully customized alert or reminder emails.

An Alert Flow operates at intervals scan for any new creations, modifications, or deletions. Once such changes are detected, the flow initiates the dispatch of alert emails.

And a Reminder Flow operates based on a schedule you set, automatically sending out reminder emails accordingly.

Please ensure that you have a valid subscription license for Power Automate.

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


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

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


2. Install, Upgrade and Remove App

2.1 Add the App from the Microsoft AppSource

Before beginning, make sure the account that is performing this procedure is a member of the site Owners group, or has the same permission.

1. On the site where you want to add an app, go to Settings  and then select **Add an app**.
2. On the Site Contents page, click **Add an App**.
3. Search "Alert Reminder" in the search bar.
4. Once the app appears in the search result, click on it.
5. On the app page, click on **Add to Apps site** button.
6. Allow the system to complete the validation process. You can choose to either **Only enable this app** or **Enable this app and add it to all sites** (recommended). If the latter option is not selected, the app will need to be individually added to each site where you want to use it.

Confirm data access

 Alert Reminder

The app you're about to enable will have access to data by using the identity of the person using it. Enable this app only if you trust the developer or publisher.

This app gets data from:

- SharePoint

API access that must be approved after you enable this app

- Microsoft Flow Service, Flows.Read.All
- Microsoft Flow Service, Flows.Manage.All

App availability

This app contains an organization-wide extension. To make sure all features in the app work as designed, add the app to all sites.

☐ Only enable this app
Selecting this option makes the app available for site owners to add from the My apps page. [Learn how to add an app to a site](#)

☒ Enable this app and add it to all sites
Selecting this option adds the app automatically so site owners don't need to.

AddCancel

7. And then click **Add** button.
8. Now the app has been successfully added in your SharePoint. You can access it in your SharePoint list. If you can't locate it, navigate to the site contents, and add the Alert Reminder in this site.s

2.2 Grant Access to APIs

The app requires access to Flows, a Global Administrator must grant access in SharePoint Admin page to ensure the app functionality is enabled.

To grant the permissions, you need to do the following:

1. Navigate to the SharePoint Admin Center in your tenant.
2. In the left navigation pane, under **Admin centers**, click on **SharePoint**.
3. On the left menu click on **API access** under **Advanced**.
4. Approve the Microsoft Flow Service permission requests by selecting each permission request and clicking Approve.

API name	Package	Permission
Pending requests (2)		
Organization-wide (2)		
Microsoft Flow Service	Alert Reminder	Flows.Read.All
Microsoft Flow Service	Alert Reminder	Flows.Manage.All

Here you should be able to see the pending approval request for special permissions:

Microsoft Flow Service / Flows.Read.All: This allows the application to read all flows (automation processes) in the organization.

Microsoft Flow Service / Flows.Manage.All: This allows the application to read, update, delete, and create flows on behalf of all users in the organization.

2.3 Add the App in the Site

If you select **Only enable this app** option while adding the app, follow these steps to add the app to individual site.

1. From your Site Contents page, click on **Add an app**.
2. Alert Reminder is shown under Apps you can add. Click the Alert Reminder title.
3. The app is now listed on the Site Contents page.
4. Navigate to a list, the Alert Reminder action is visible on the command bar on the list.

Note: The action is only available for SharePoint Online modern experience.

2.4 Upgrade the App from AppSource

1. Navigate to the **App Catalog** site within your SharePoint Online tenant.
2. Find the **Alert Reminder** in the App Catalog and click on it.
3. If an update is available, you will see an **Upgrade Store App** option in the command bar. Click this option to begin the upgrade process.
4. You'll be directed to a deployment page. You can choose to make the solution available to all sites in the organization. If this option is not selected, you'll need to manually update the app on each individual site.
5. Click the **Deploy** button to install the latest version of the app.
6. Go to the Site contents page (A site where app already deployed), find Column View Permission and click the ellipses (...) to view the app properties dialog.
7. In the callout that opens, click on **Details**.
8. Click **Get It** button to upgrade the app to the latest version.
9. After upgrading the app to the latest version, you need to re-deploy the existing flows to ensure the updates work properly.


Alternatively, you can delete the app from the App Catalog and then install the latest version from Microsoft AppSource.

Please note that the product settings will not be lost when you upgrade to the latest version or delete the current version.

2.5 Remove the App from a Site

1. Click **Settings** and then click **Site Contents**.
2. On the **Site Contents** page, find the app and click the ellipses (...) to view the app properties dialog.
3. In the callout, click the ellipses (...) and then click **Remove** on the menu.
4. Click **OK**.

2.6 Remove the App from your App Catalog

1. Sign into Office 365 as a global admin or SharePoint admin.
2. Select the app launcher icon  in the upper-left and choose **Admin** to open the Microsoft 365 admin center.
3. In the left pane, choose **Admin centers** > **SharePoint**.
4. Select **apps** in the left pane, and then select **App Catalog**.
5. Click the **Apps for SharePoint** to display available SharePoint apps.
6. Click the **BoostSolutions Alert Reminder** to display the context menu and choose **Delete**.
7. Click **OK** on the confirmation message.
8. The BoostSolutions Alert Reminder App is removed from the **App Catalog**.

3. Create an Alert Item

An alert item acts as a profile, containing details such as connections, recipients, and email content. Once an alert item is successfully created, a corresponding flow is automatically generated in Power Automate.

By default, this flow is configured to run every 5 minutes, checking for any new creations, modifications, or deletions. When such changes are detected, the flow triggers the delivery of alert emails.

To create an alert item, the user must have the **Manage Lists** permission. This permission ensures that the user can create and manage alerts effectively.

To set up an alert item, navigate to a list or library in SharePoint Online.

1. At the top of the list, click on **Alert Reminder**.
2. In the pop-up dialog box, click **Add an alert** item.
3. And then, give a name for it in the **Title** section.
4. In the **Flow Settings** section, configure the following settings:

Flow Settings

Select a deployment environment for the flow.

The flow utilizes the given SharePoint connection to access data from SharePoint Online, and the specified Office 365 Outlook connection to send emails.

Deploy flow to:

bsmark (default) ▼

Specify a SharePoint connection:

▼

+ New SharePoint Connection

Specify an Office 365 Outlook connection:

▼

+ New Office 365 Outlook Connection

- **Deploy Flow to:** This allows you to specify the environment in which the flow should run. By default, the flow operates in the current environment. However, if you have multiple environments, you can specify a different one as needed.

Please note that once you specify an environment for the flow to run in the **Tenant Flow Settings** section, this setting cannot be changed.

- **Specify a SharePoint connection:** This involves selecting a SharePoint connection for the flow. This connection will be used to access data within SharePoint Online. By default, the current connection is utilized for data access. If there is no connection, click **New SharePoint Connection** to create a new one.

If you click **New SharePoint Connection**, you will be redirected to Power Automate to create a new connection. (Please refer to [8. Create New SharePoint Connection](#) section)

- **Specify an Office 365 Outlook connection:** This requires you to identify an Office 365 Outlook connection that will be used to send emails. The identified Outlook account will be the one from which emails are sent. By default, the current connection is used. If there is no connection, click **New Office 365 Outlook Connection** to create a new one.

If you click **New Office 365 Outlook Connection**, you will be redirected to Power Automate to create a new connection. (Please refer to [9. Create Office 365 Outlook Connection](#) section)

5. In the **Change Type** section, specify the type of changes that you want to be alerted to.

Change Type

Specify the type of changes for alert.

Note: the "Items are deleted" cannot be chosen along with other options as item information is not accessible after deletion.

- ☒ New items are added
- ☒ Existing items are modified
- ☐ Items are deleted (cannot be selected in conjunction with other options)

- **New items are added:** This will send alert emails when new items/documents are added in the list or library.
- **Existing items are modified:** This will send alert emails when existing items/documents are modified in the list or library.
- **Items are deleted:** This will send alert emails when items/documents are deleted from the list or library.

Please note that the **Items are deleted** option cannot be selected simultaneously with other options because item information cannot be obtained after deletion. Therefore, you need to create a separate alert item for sending alert emails when items are deleted.

6. In the **What to Send** section, you can select which items will trigger an alert. There are three options for you to choose from: All items, Item from a view and Conditional items.

What to Send

☒ All items ☐ Items from a view ☐ Conditional items

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

- **All items:** All items in the current list. It means that all items which are created, modified or deleted, an alert email will be sent.
- **Items from a view:** Only send alert emails when the changes happen in the items from a specific view.

☐ All items ☒ Items from a view ☐ Conditional items

Grouped by priority

- **Conditional items:** Only send alert emails when the items meet the specified conditions.

Alert Reminder supports comprehensive and powerful conditions, find it in [Conditions](#) section.

☐ All items ☐ Items from a view ☒ Conditional items

View Columns Function Operators

Priority == "High"

Expression is valid.

7. In the **Message** section, specify the receipts and email subject and body.

Specify the Sender

Click on the 'From...' button to configure the email sender. A dialog box will appear. In the dialog box, specify the email address you want to send the email from.

From

✕

Email Address

Specify the email address that emails are sent from (The Office 365 Outlook connector account should have "Send as" or "Send on behalf of" permissions for this mailbox).

OK

Cancel

Please note: If you're using the Office 365 Outlook Connector account, ensure it has the "Send as" or "Send on behalf of" permission for the mailbox you're using.

Specify the Recipients, To, CC and BCC

The configurations for the Recipients, To, CC and BCC fields are the same. We will use the To field as an example.

To

✕

Users and Groups

Enter user names and group names.

Users

 ✕**Email Addresses**

Specify email addresses or columns containing email addresses.

 ✕ ✕

OK

Cancel

The recipients can be of the following types:

- SharePoint users and groups – any SharePoint user or group on the current site. Note that the emails will be sent to each individual user email, even though a group appears as a recipient.
- Users in column – select a User/Group column (such as Created By or Assigned To) of the current list. The actual value of the column at the moment of alert sending will be used as recipients.
- Any text column can also be used and is assumed to contain email address[es]. If multiple addresses are used, they must be separated by semi-colon (;). Note that no validation is performed for the email addresses.
- Email addresses – manually enter one or more email addresses.

8. Then configure the email subject.

Here, you can specify the subject line of the email. You can include list columns and token to be dynamically replaced with values.

Subject

View Columns

New Task: Title

9. Then, specify the importance for this email.

Importance


Normal

By default, it is specified as Normal. However, you can modify it based on your preference.

If you select High, then the email will be sent with high importance.

! This message was sent with High importance.

If you select Low, the email will be sent with Low importance.

 This message was sent with Low importance

10. And then configure the email body.

In this section, you have the option to customize the email content, choose whether to include item attachments in the email, and decide if item information should be incorporated into the body of the email.

Email Body

- ☒ Send item attachments as attachments in the notification email
- ☒ Include item information in the notification email
- ☒ Include custom content in the notification email

Send item attachments as attachments in the notification email

Add attachments from the item or document (if the alert is set up on a document library) to the email message.

Include item information in the notification email

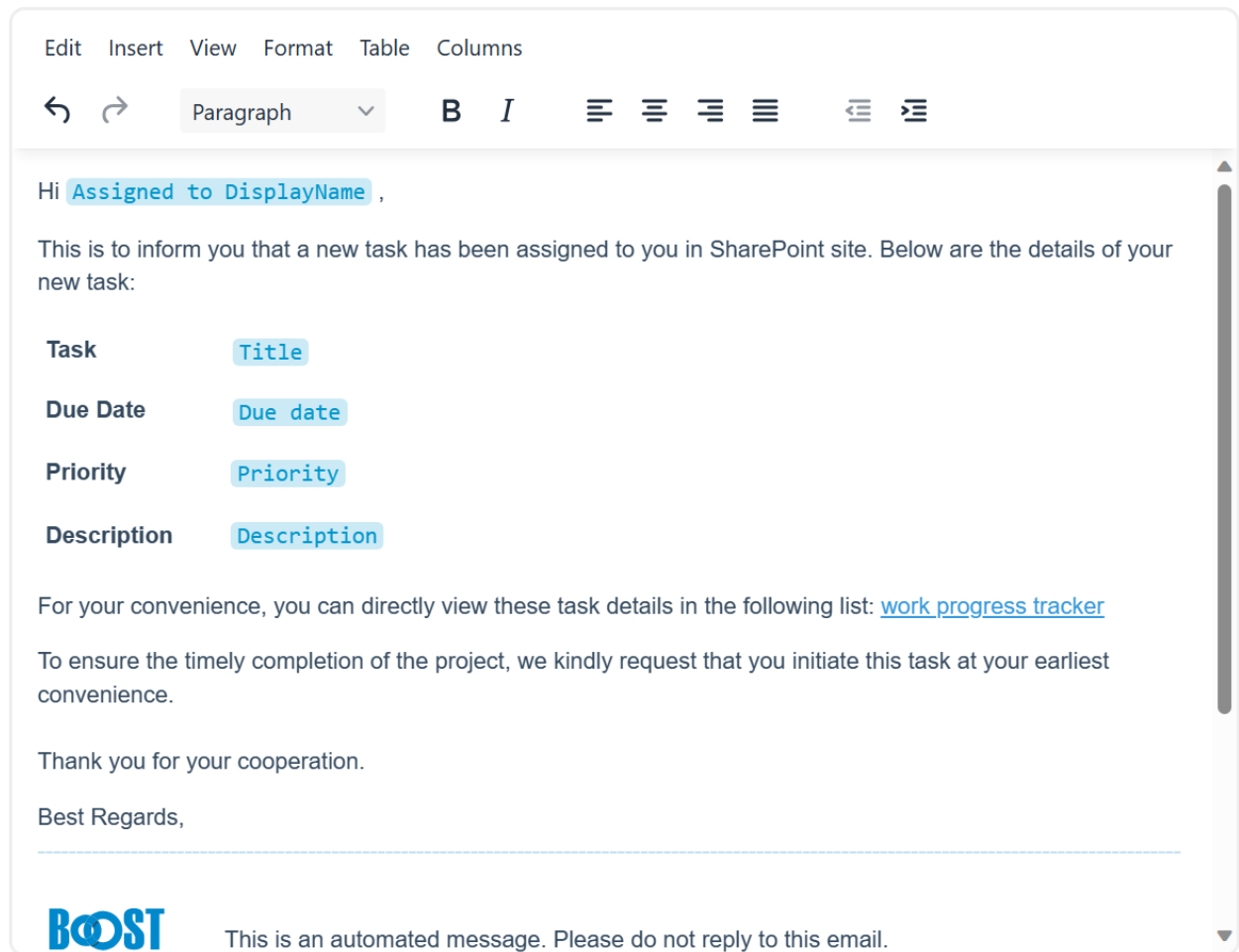
Activate this option to include item information in the body of the email. The column order will follow the same sequence as in the list. This item information will be positioned below any customized content.

Highlighted changes can be displayed in the email body only when this option is enabled.

Please note, the feature for tracking changes is only available when versioning is enabled in the list or library. The product compares the changes between the two latest versions and shows the changes in the email.

Include custom content in the notification email

This feature allows you to personalize the email body using rich text formatting. This includes the ability to insert links, images, tables, and text colors and effects using the editor. Furthermore, you can add columns and tokens that will dynamically replace with specific values when the email is sent.



11. Then click **OK**.
12. Now an alert item is created.
13. The product will create a flow based on the given configuration and wait until the flow is successfully deployed.
14. Then, when a new item is created in the list, the designated recipients will receive a notification email.

New Task: Update Company Website

1/15/2024 12:01 PM

To: Adele V

Hi Adele V,

This is to inform you that a new task has been assigned to you in SharePoint site. Below are the details of your new task:

Task	Update Company Website
Due Date	1/16/2024
Priority	Critical
Description	Refresh the content on the company website to ensure all information is current and accurate.

For your convenience, you can directly view these task details in the following list: [work progress tracker](#)

To ensure the timely completion of the project, we kindly request that you initiate this task at your earliest convenience.

Thank you for your cooperation.

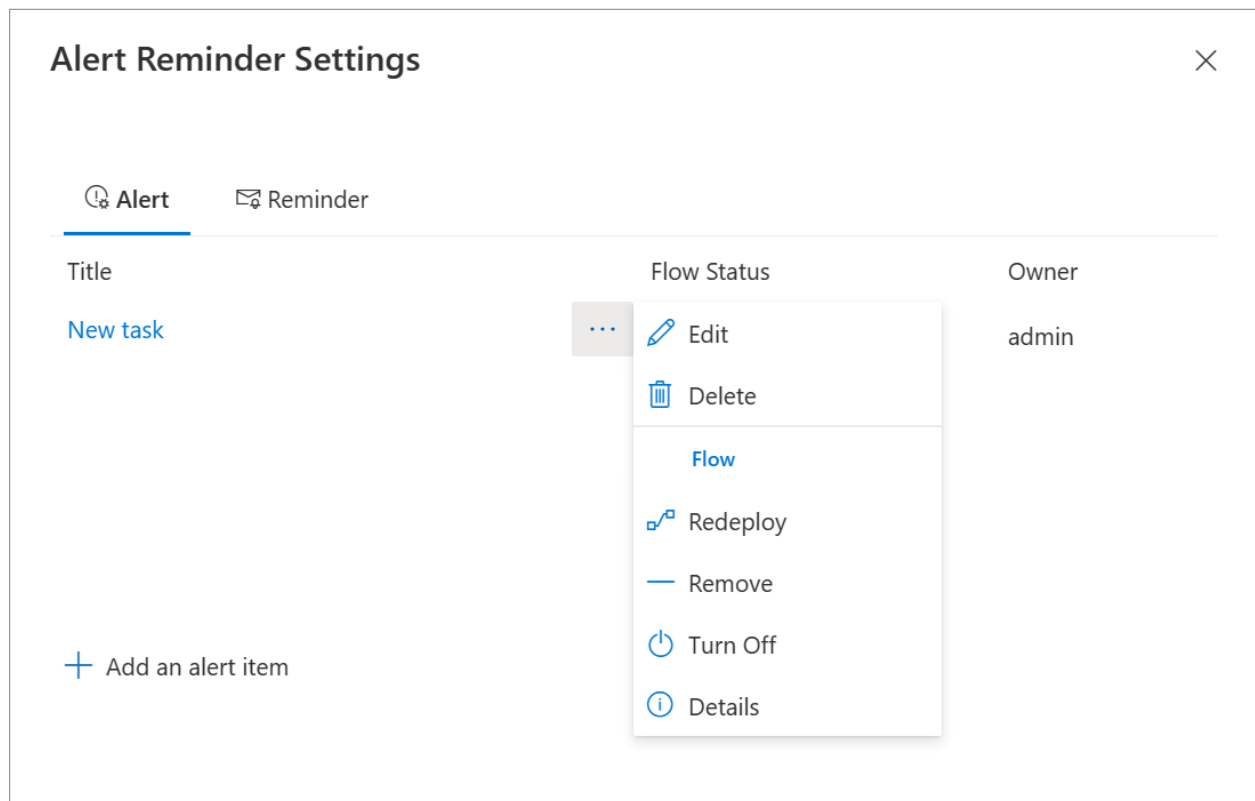
Best Regards,



This is an automated message. Please do not reply to this email.

4. Edit/Delete an Alert Item

To edit an alert item, click the ellipses (...) and then click **Edit** on the menu. This will open the **Edit Alert Item** dialog. Make the necessary changes and click **OK** to save these changes.



To delete an alert item, click the ellipses (...) and then click **Delete** on the menu.

To confirm the deletion of the alert item, click the **Delete** button. Please note that any flow created based on the settings of this alert will also be deleted along with the alert item.

Delete?

Are you sure you want to delete this item and the related flow?

Delete

Cancel

5. Create a Reminder Item

A reminder item serves as a profile, encompassing details of connections, recipients, schedule and email content. Upon successful creation of a reminder item, a corresponding flow is generated in Power Automate.

This flow operates according to your set schedule and sends reminder emails accordingly.

To create an alert item, the user must have the **Manage Lists** permission. This permission ensures that the user can create and manage alerts effectively.

To create a reminder item, navigate to a list or library in SharePoint Online.

1. At the top of the list, click on Alert Reminder.
2. In the pop-up dialog box, click **Add a reminder** item under the **Reminder** tab.
3. Give a name for it in the **Title** section.
4. In the **Flow Settings** section, configure the following settings:

Flow Settings

Select a deployment environment for the flow.

The flow utilizes the given SharePoint connection to access data from SharePoint Online, and the specified Office 365 Outlook connection to send emails.

Deploy flow to:

bsmark (default)

Specify a SharePoint connection:

+ New SharePoint Connection

Specify an Office 365 Outlook connection:

+ New Office 365 Outlook Connection

- **Deploy Flow to:** This allows you to specify the environment in which the flow should run. By default, the flow operates in the current environment. However, if you have multiple environments, you can specify a different one as needed.

Please note that once you specify an environment for the flow to run in the **Tenant Flow Settings** section, this setting cannot be changed.

- **Specify a SharePoint connection:** This involves selecting a SharePoint connection for the flow. This connection will be used to access data within SharePoint Online. By default, the current connection is utilized for data access. If there is no connection, click **New SharePoint Connection** to create a new one.

If you click **New SharePoint Connection**, you will be redirected to Power Automate to create a new connection. (Please refer to [8. Create New SharePoint Connection](#) section)

- **Specify an Office 365 Outlook connection:** This requires you to identify an Office 365 Outlook connection that will be used to send emails. The identified Outlook account will be the one from which emails are sent. By default, the current connection is used. If there is no connection, click **New Office 365 Outlook Connection** to create a new one.

If you click **New Office 365 Outlook Connection**, you will be redirected to Power Automate to create a new connection. (Please refer to [9. Create Office 365 Outlook Connection](#) section)

5. In the **Schedule** section, you can specify how often and when you want to be reminded.

Schedule

Set the schedule to determine when the reminder will run.

Repeat every	<input type="text" value="1"/>	*	<input type="text" value="Day"/>
<input checked="" type="checkbox"/> Start	<input type="text" value="Wed Jan 17 2024"/>	<input type="text" value="09:00"/>	
<input type="checkbox"/> End	No End Date		

Reminder will run every day.

In the Start time field, define the date and time when the reminder emails should start to be sent out.

You have the option to send reminder emails every specified number of seconds, minutes, hours, days, weeks, or months.

Alternatively, you can choose to send the reminder emails only on certain weekdays, such as every Monday.

Schedule

Set the schedule to determine when the reminder will run.

Repeat every	<input type="text" value="1"/>	*	<input type="text" value="Week"/>
On these days	<input type="text" value="Monday, Tuesday, Wednesday"/>		
<input checked="" type="checkbox"/> Start	<input type="text" value="Wed Jan 17 2024"/>	<input type="text" value="09:00"/>	
<input type="checkbox"/> End	No End Date		

Reminder will run on Monday, Tuesday, Wednesday every week.

6. In the **What to Send** section, you can select which items will generate an alert. There are three options for you to choose from: All items, Item from a view and Conditional items.

What to Send

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

☒ All items ☐ Items from a view ☐ Conditional items

- **All Items:** All items in the current list.
- **Items from a View:** Only send reminder emails for the items within a specific view.

☐ All items ☒ Items from a view ☐ Conditional items

Grouped by priority



- **Conditional Items:** Only send reminder emails when the items meet the specified conditions.

BoostSolutions Alert Reminder supports comprehensive and powerful conditions, find it in [Conditions](#) section.

☐ All items ☐ Items from a view ☒ Conditional items

View Columns Function Operators

Priority == "High"

Expression is valid.

7. In the **Message** section, specify the receipts and email subject and body.

Specify the Sender

Click on the **From...** button to configure the email sender. A dialog box will appear. In the dialog box, specify the email address you want to send the email from.

Please note: If you're using the Office 365 Outlook Connector account, ensure it has the **Send as** or **Send on behalf** of permission for the mailbox you're using.

Specify the Recipients, To, CC and BCC

The configurations for the Recipients, To, CC and BCC fields are the same. We will use the To field as an example.

To

Users and Groups

Enter user names and group names.

Email Addresses

Specify email addresses or columns containing email addresses.

Users

Danies Liu

Cynthia@bs.com

Assigned to Email

Columns

OK

Cancel

The recipients can be of the following types:

- SharePoint users and groups – any SharePoint user or group on the current site. Note that the emails will be sent to each individual user email, even though a group appears as a recipient.
- Users in column – select a User/Group column (such as Created By or Assigned To) of the current list. The actual value of the column at the moment of alert sending will be used as recipients.
- Any text column can also be used and is assumed to contain email address[es]. Note that no validation is performed for the email addresses.

- Email addresses – manually enter one or more email addresses.
8. Then configure the email subject.

Subject

View Columns

Upcoming Task: Title


Here, you can specify the subject line of the email. You can include list columns and token to be dynamically replaced with values.

9. Then, specify the importance for this email.


Importance Normal

By default, it is specified as Normal. However, you can modify it based on your preference.

If you select High, then the email will be sent with high importance.

 This message was sent with High importance.

If you select Low, the email will be sent with Low importance.

 This message was sent with Low importance

10. And then configure the email body.

Email Body

- ☒ Send item attachments as attachments in the notification email
- ☒ Include item information in the notification email
- ☒ Include custom content in the notification email

In this section, you have the option to customize the email content, choose whether to include item attachments in the email, and decide if item information should be incorporated into the body of the email.

Send item attachments as attachments in the notification email

Add attachments from the item or document (if the alert is set up on a document library) to the email message.

Include item information in the notification email

Activate this option to include item information in the body of the email. The column order will follow the same sequence as in the list. This item information will be positioned below any customized content.

Include custom content in the notification email

This feature allows you to personalize the email body using rich text formatting. This includes the ability to insert links, images, tables, and text colors and effects using the editor. Furthermore, you can add columns and tokens that will dynamically replace with specific values when the email is sent.

EditInsertViewFormatTableColumns

↶↷

Paragraph

▼

B

I

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≡≡

≡≡

Hi,

Here's a friendly reminder about your upcoming task:

Task	Title
Due Date	Due date
Description	Description

Please make sure all necessary preparations are completed in advance.

Best Regards,

BOOST
SOLUTIONS

This is an automated message. Please do not reply to this email.

11. Then click **OK**.

12. Now a reminder item is created.

13. Wait for minutes, then the recipients will receive the reminder email.

Upcoming Task: Update Company Website

9:01 AM

To: Adele V

Hi,

Here's a friendly reminder about your upcoming task:

Task	Update Company Website
Due Date	1/16/2024
Description	Refresh the content on the company website to ensure all information is current and accurate.

Please make sure all necessary preparations are completed in advance.

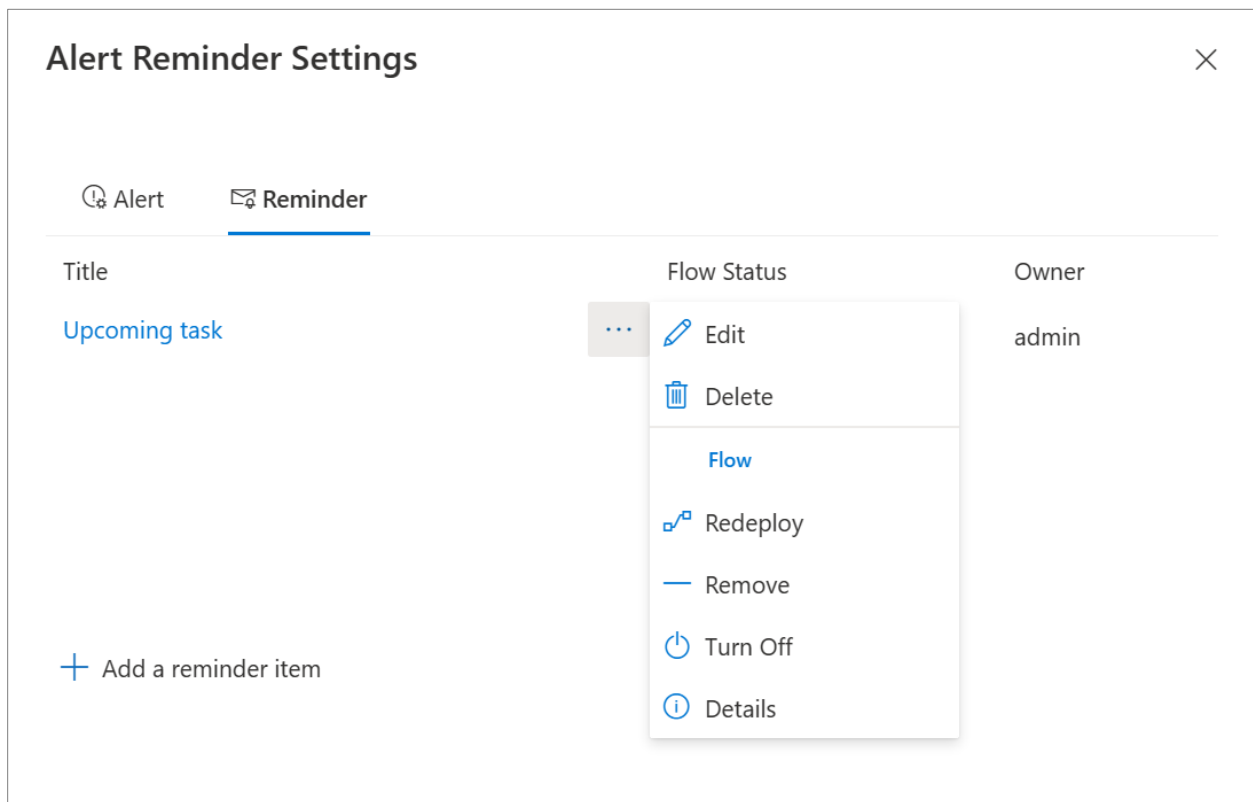
Best Regards,



This is an automated message. Please do not reply to this email.

6. Edit/Delete a Reminder Item

To edit a reminder item, click the ellipses (...) and then select **Edit** from the menu. This will open the **Edit Reminder Item** dialog. Make the necessary changes and click **OK** to save these changes.



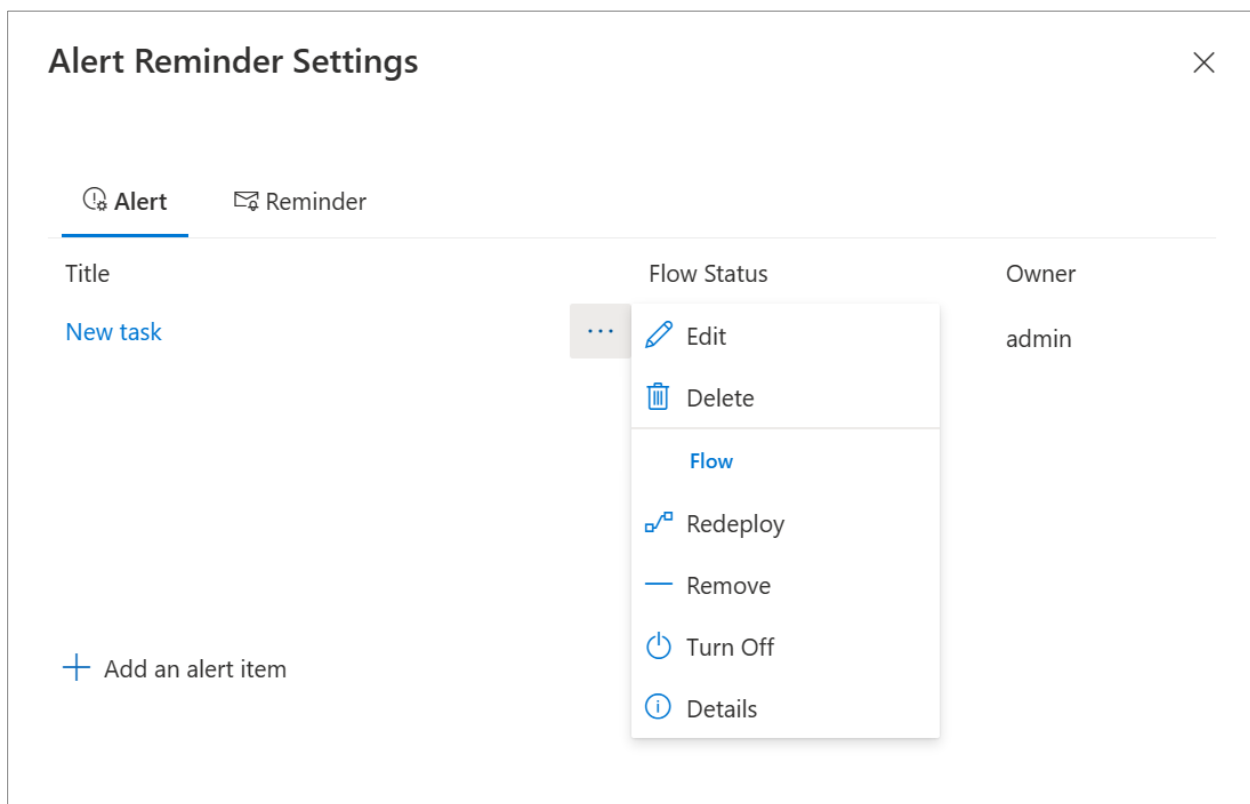
To delete a reminder item, click the ellipses (...) and then click **Delete** on the menu.

To confirm the deletion of the alert item, click the **Delete** button. Please note that any flow created based on the settings of this reminder will also be deleted along with the reminder item.

7. Manage or Monitor Flow

7.1 Turn On/Turn Off a Flow

After creating an alert or reminder item, if it's not being used for a while, it can be turned off. Once it's turned off, no alert or reminder emails will be sent until it is turned back on.

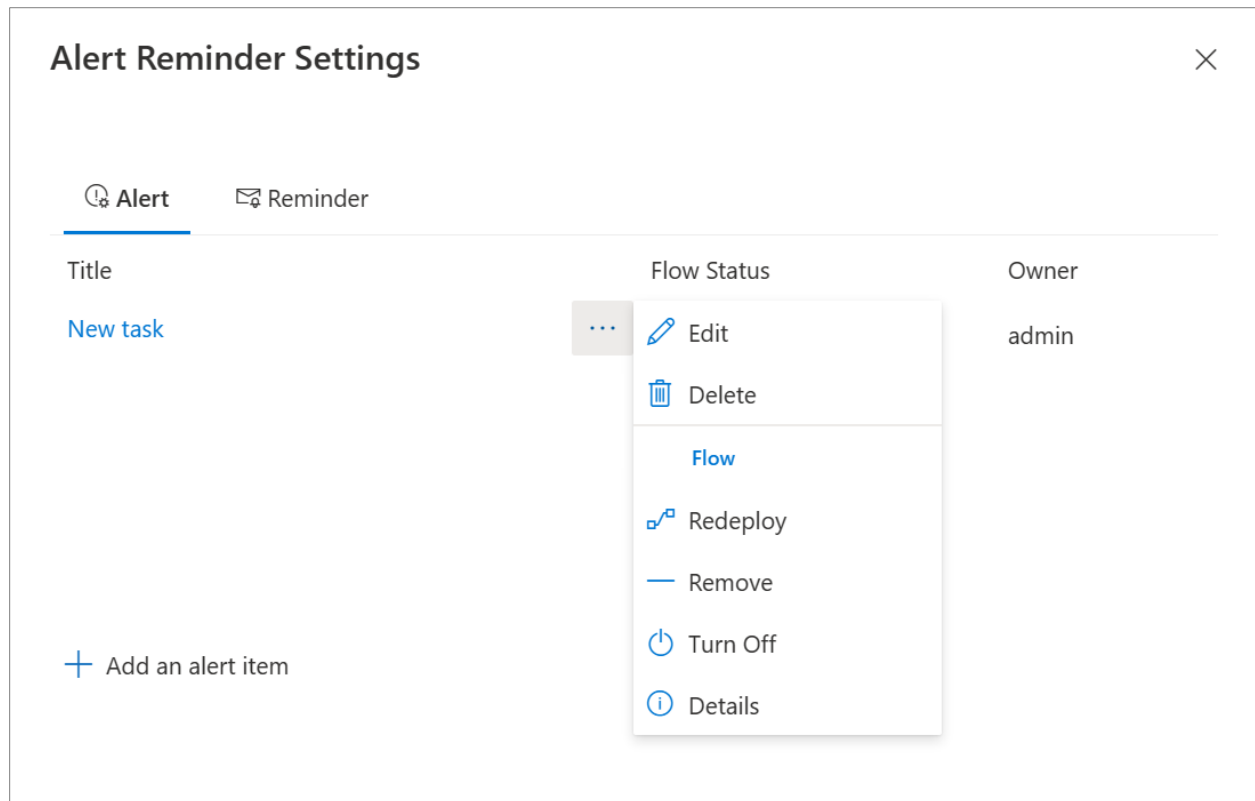


Turning off an alert or reminder item is the same process. Click the ellipses (...) and then select **Turn Off** from the menu. After this action, the status of the item will change to **Off**.

To turn the alert or reminder item back on, click the ellipses (...) and then select **Turn On** from the menu. The status of the item will then change to **On**.

Please note that all changes made while the flow is turned off will be recorded. Once you turn the flow back on, the alert flow will send notification emails for these changes.

7.2 Deploy/Redeploy/Remove a Flow



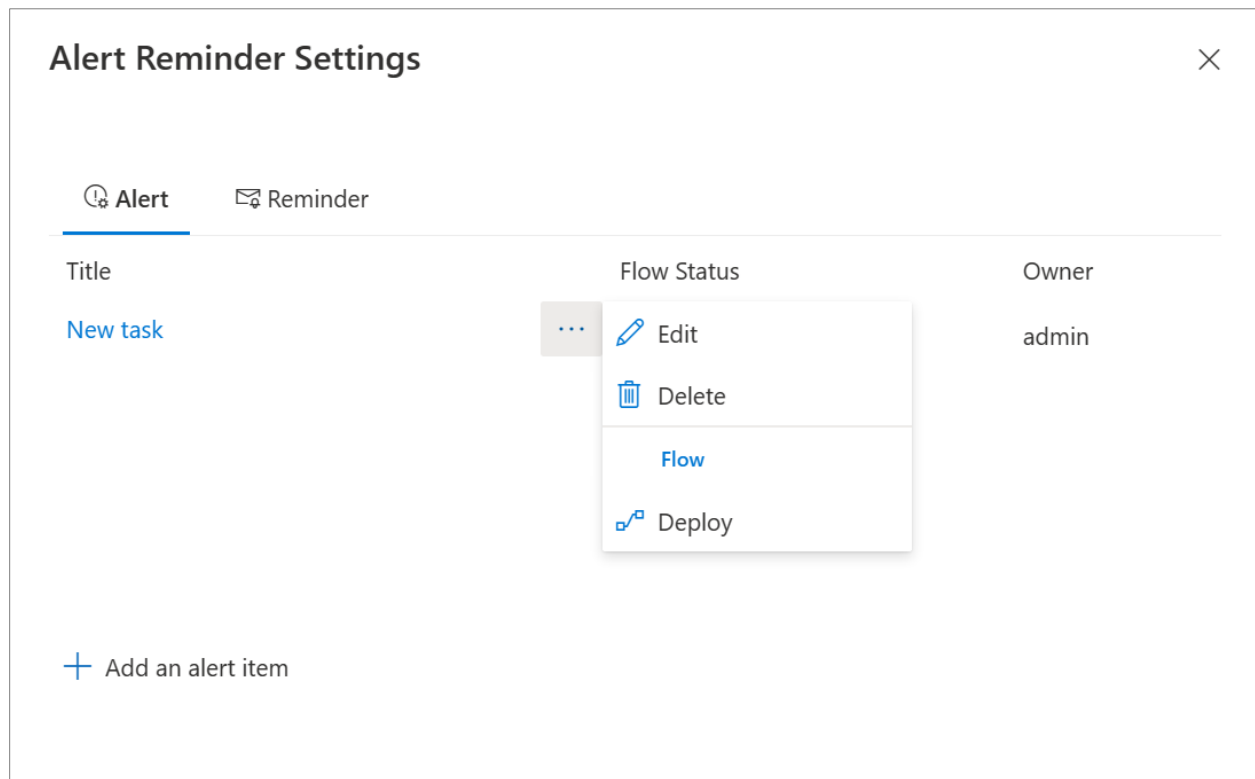
Redeploy Flow: This action creates a flow based on the settings of an alert or reminder item.

To redeploy a flow based on the settings of an alert or reminder item, click on the ellipses (...) and then select **Redeploy** from the menu. Please note that if the flow has already been deployed before, this action will overwrite the existing flow.

Remove Flow: This action deletes the corresponding flow but leaves the alert or reminder item intact.

To remove a flow, click on the ellipses (...) and then select **Remove** from the menu.

Deploy Flow: This action creates a flow based on the settings of an alert or reminder item. The action only is available when the flow status is Not deployed.



To deploy a flow based on the settings of an alert or reminder item, click on the ellipses (...) and then select **Deploy** from the menu.

BoostSolutions' Alert Reminder uses SPFX to create flows based on the configurations of alert or reminder items.

You can manage and monitor these flows by clicking **Details** from the menu. This action will navigate you to the **Power Automate > My Flows** > corresponding flow page. Here, you have the option to edit, turn off, delete, or export the flow just like any other flow. You can also monitor the flow's running history to check if the flow is working properly.

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My flows

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Power Platform

Edit

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Save As

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Send a copy

Export

Process mining (previ

Flows > New task (46fc0aac-87bc-4f67-8e72-3c5ee9484603)

Details

Edit

Flow

New task (46fc0aac-87bc-4f67-8e72-3c5ee9484603)

Owner

admin

Status

On

Created

Feb 4, 08:41 PM

Modified

Feb 5, 10:19 AM

Type

Automated

Plan

This flow runs on owner's plan

28-day run history ⓘ

Edit columns

All runs

Start

Duration

Status

Feb 4, 08:43 PM (13 h ago)

00:00:04

Succeeded

8. Create New SharePoint Connection

When setting up an alert or reminder item, you have the option to create a new SharePoint connection. This allows you to establish a new connection for accessing data within SharePoint.

To do this, click on the **New SharePoint Connection** link.

Flow Settings

Select a deployment environment for the flow.

The flow utilizes the given SharePoint connection to access data from SharePoint Online, and the specified Office 365 Outlook connection to send emails.

Deploy flow to:

bsmark (default)

Specify a SharePoint connection:

+ New SharePoint Connection

Specify an Office 365 Outlook connection:

+ New Office 365 Outlook Connection

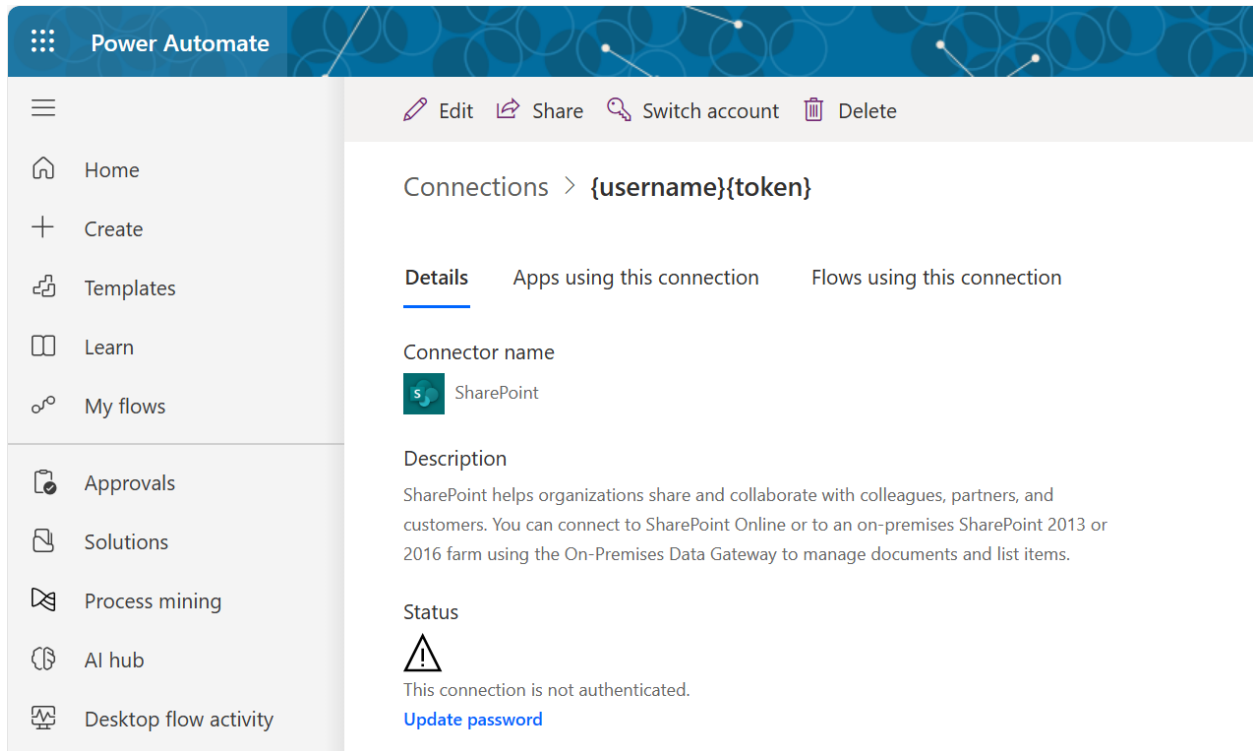
Create Connection

You will be redirected to Power Automate to create a new connection. Click "Switch account" button or "Update password" link to set your account info. Do you wish to continue?

Continue

Cancel

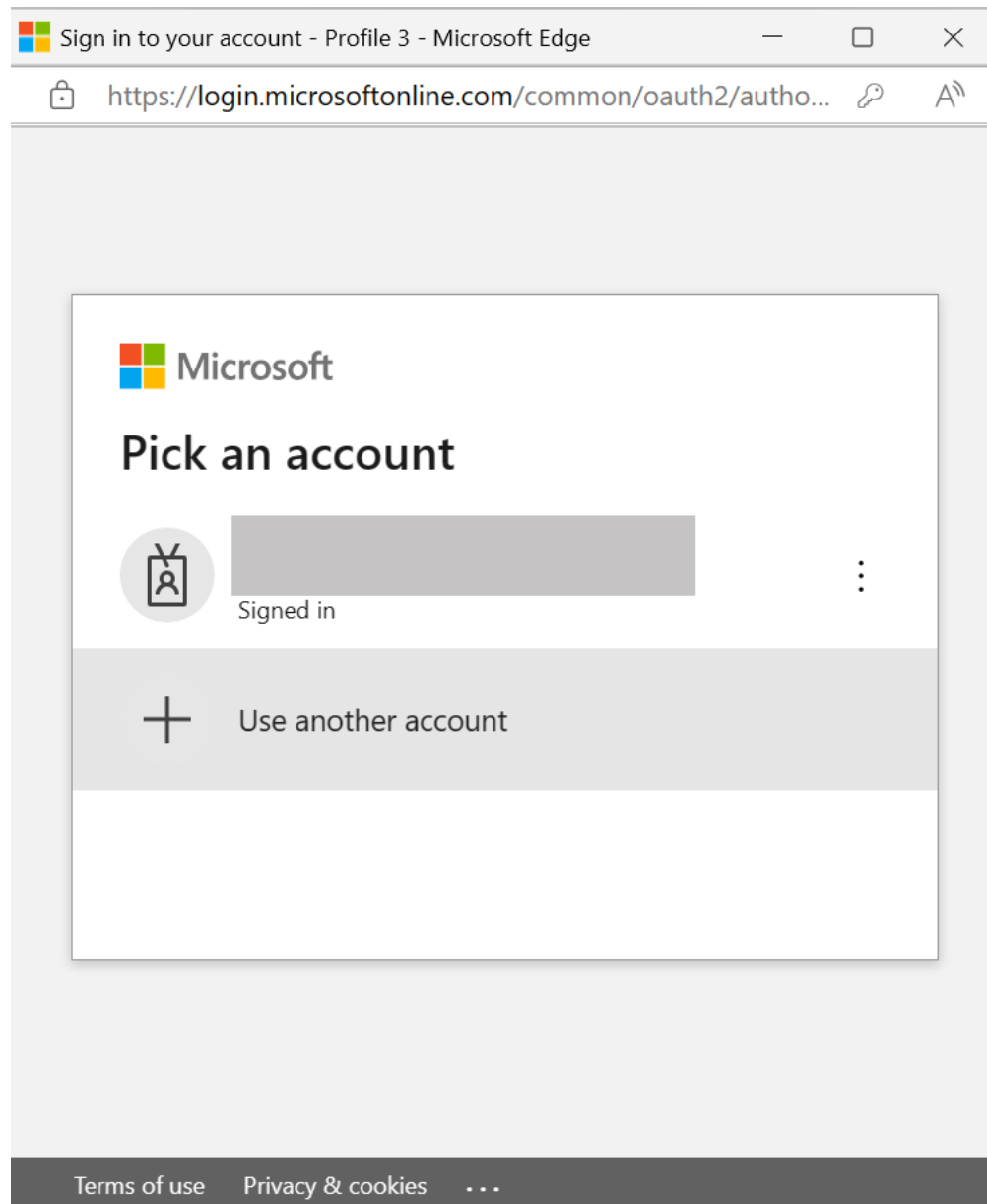
A dialog box will pop up, click the **Continue** button, you will then be redirected to the **Connections** page in Power Automate.



On this page, you have the options to either **Switch account** or **Update password** to input the credentials.

If you choose **Switch account**, a window will open that allows you to sign into a different account for the connection.

You can either select an existing account or click on the **Use another account** option. If you choose the latter, you will need to provide the necessary details for the new account.



Choosing either of these options will update and change the connection for the flow created by the current alert or reminder item.

If you choose **Update password**, the same window as described above will open. This allows you to either select an existing account or sign into a different account for the connection.

9. Create New Office 365 Outlook Connection

When setting up an alert or reminder item, you have the option to create a new Office 365 Outlook connection. This allows you to establish a new connection for sending emails.

To do this, click on the **New Office 365 Outlook Connection** link.

Flow Settings

Select a deployment environment for the flow.

The flow utilizes the given SharePoint connection to access data from SharePoint Online, and the specified Office 365 Outlook connection to send emails.

Deploy flow to:

bsmark (default)

Specify a SharePoint connection:

+ New SharePoint Connection

Specify an Office 365 Outlook connection:

+ New Office 365 Outlook Connection

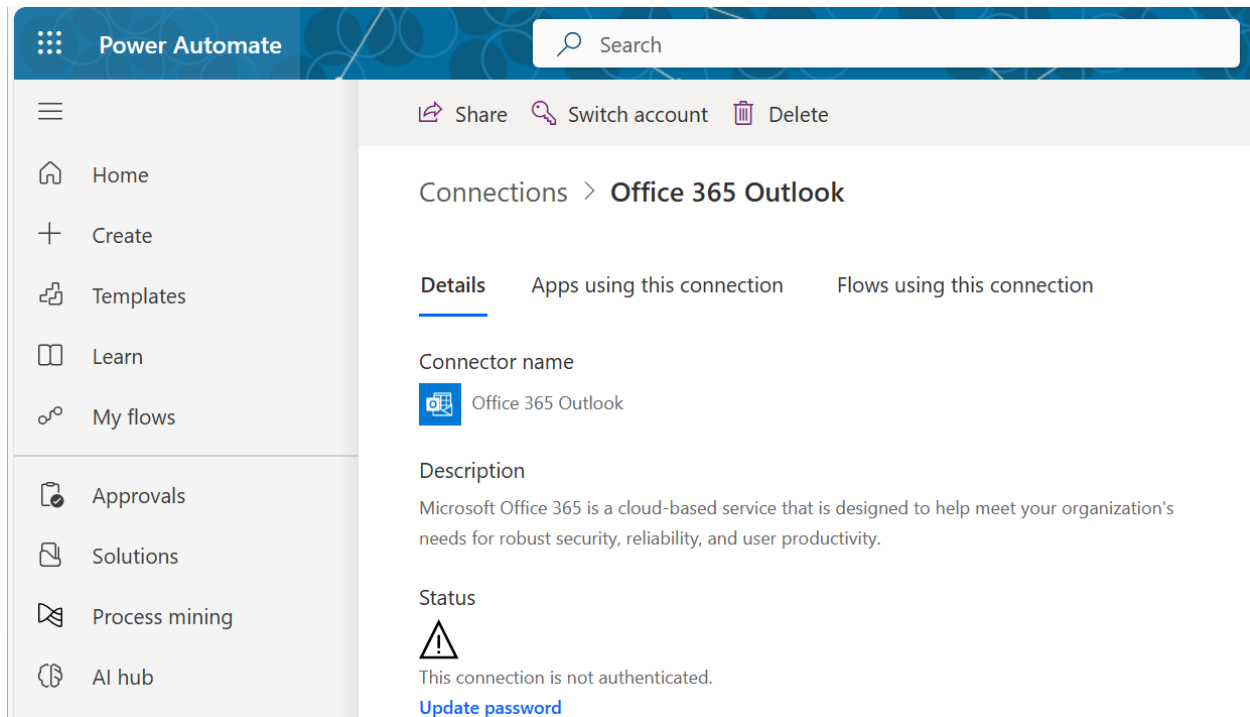
Create Connection

You will be redirected to Power Automate to create a new connection. Click "Switch account" button or "Update password" link to set your account info. Do you wish to continue?

Continue

Cancel

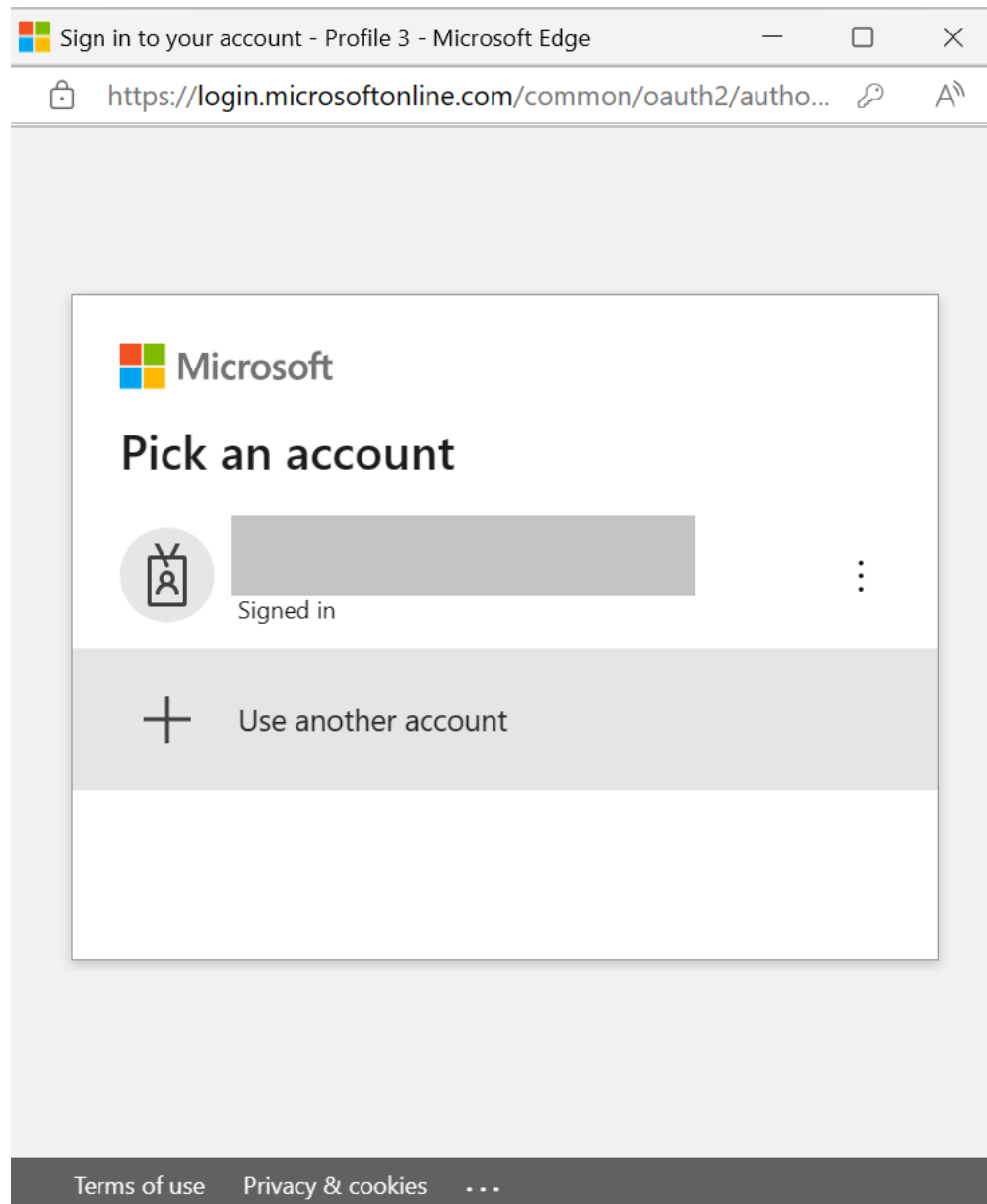
A dialog box will pop up, click the **Continue** button, you will then be redirected to the **Connections** page in Power Automate.



On this page, you have the options to either **Switch account** or **Update password** to input the credentials.

If you choose **Switch account**, a window will open that allows you to sign into a different account for the connection.

You can either select an existing account or click on the **Use another account** option. If you choose the latter, you will need to provide the necessary details for the new account.



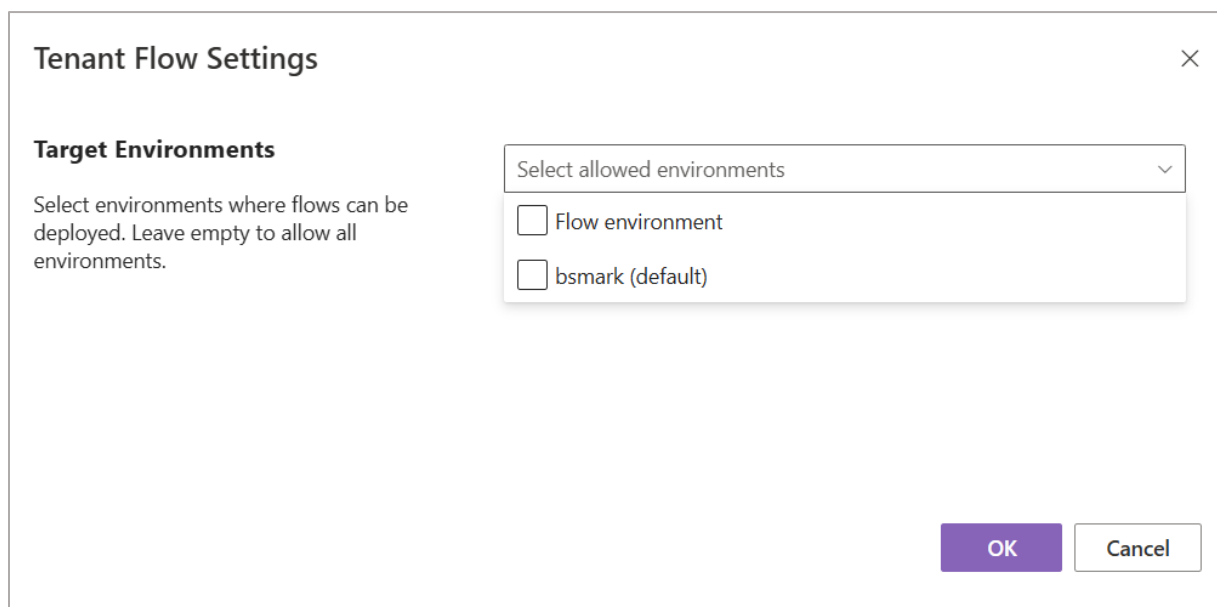
Choosing either of these options will update and change the connection for the flow created by the current alert or reminder item.

If you choose **Update password**, the same window as described above will open. This allows you to either select an existing account or sign into a different account for the connection.

10. Specify the Tenant Flow Settings

If you have multiple environments, you can specify an environment in which the flow will run.

Environment settings are tenant-wide configurations, meaning they are stored within the SharePoint Online Tenant Properties. Only **tenant administrators** or the **Tenant App Catalog Web Owner** have access to manage these properties, ensuring proper control and organization-wide management of these settings.



The screenshot shows a dialog box titled "Tenant Flow Settings" with a close button (X) in the top right corner. Inside the dialog, there is a section titled "Target Environments" with the instruction: "Select environments where flows can be deployed. Leave empty to allow all environments." To the right of this text is a dropdown menu labeled "Select allowed environments" with a downward arrow. The dropdown is open, showing two options: "Flow environment" and "bsmark (default)", each preceded by an unchecked checkbox. At the bottom right of the dialog are two buttons: "OK" (purple) and "Cancel" (white with a grey border).

Typically, once the environment is configured for one list, the same configuration is automatically applied to all lists within the same site.

Deploy flow to:



The screenshot shows a dropdown menu with the text "Flow environment" and a downward arrow on the right side.

11. Conditions

The condition in BoostSolutions' Alert Reminder is a powerful expression system capable of executing complex conditions. It is designed to return a Boolean value, either true or false. The return value then determines whether the function will perform its task. For instance, if a condition returns true, then an alert or reminder email is sent. If the condition returns false, or if an error occurs during the condition's execution, no email is dispatched.

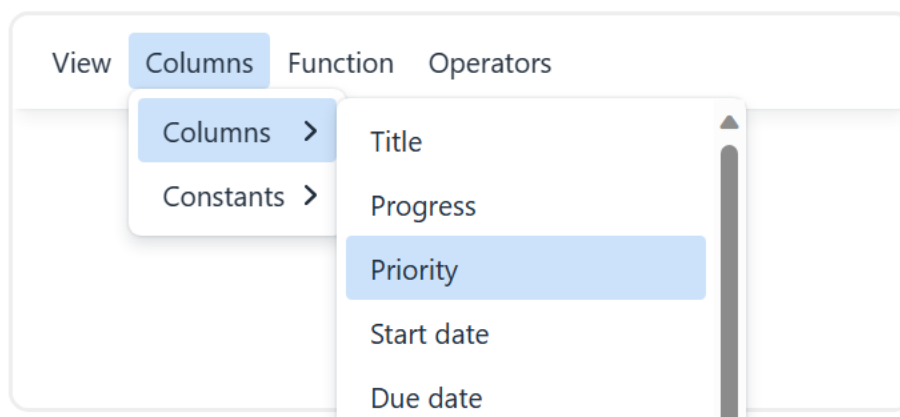
BoostSolutions' Alert Reminder provides a variety of functions and operators which can be selected and inserted from a drop-down list or entered manually. This flexibility allows users to create and customize the conditions according to their needs.

The provided functions include:

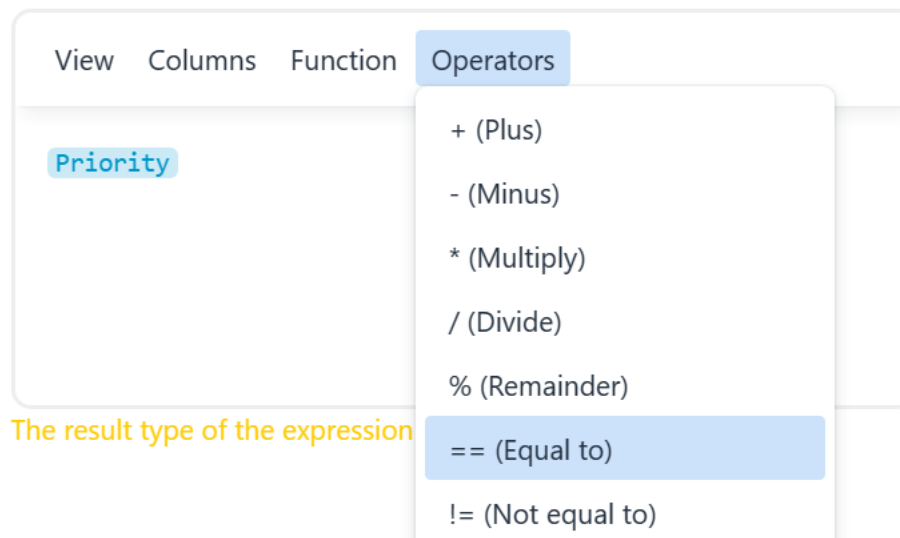
- View: Allows users to see the condition or formula in its source code format.
- Columns: Enables users to incorporate list columns or list properties into their condition. Columns represent SharePoint columns, which will be replaced by the actual values of the column during expression calculation.
- Function: Enhances the capabilities of operators, offering a broader range of functions.
- Operators: Symbols or words that perform operations on one or more operands. Used to manipulate data and variables.

To add a condition, follow these steps:

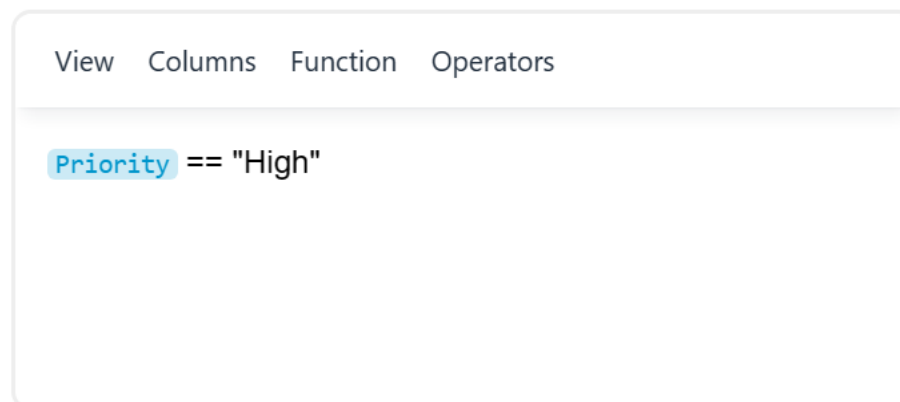
- a. In the editor area, select **Columns** > **Columns**, and choose a column.



- b. Either manually input an operator or select one from the **Operators** dropdown list. These predefined operators can assist in defining the condition.



- c. Next, determine the input value for your condition. You have the option to type in a value or select another list column or constant from the dropdown list.



Expression is valid.

- d. Upon completion of the expression, wait for the system to validate it. Please note, expressions deemed invalid by the system cannot be successfully saved.

The BoostSolutions' Alert Reminder provides the following functions:

Function	Type	Description
contains	Boolean	Check whether a collection has a specific item.

		Return true when the item is found, and false if not. This function is case-sensitive.
<p>Contain([Description], "Share")</p> <p>Check if the word 'Share' is present in the [Description] column. If 'Share' is found, the function will return 'true', otherwise, it will return 'false'.</p>		
empty	Boolean	Check whether a collection is empty. Return true when the collection is empty. Return false when not empty.
<p>empty([Description])</p> <p>Check if the [Description] column is empty. If the [Description] column is empty (has no content), the function will return 'true'. If the 'Description' column has content, the function will return 'false'.</p>		
length	Integer	Return the number of items in a string or array.
<p>length([Title])</p> <p>Calculate the length of the content in the [Title] column. If the [Title] is 'SharePoint', which comprises of 10 characters, the function will return the integer 10.</p>		
bool	Boolean	Return the Boolean version for an input value.
<p>bool([Text])</p> <p>For a [Text] column, if the value of 'Text' is 'True' or 'Yes', the function will return 'true'. Any other value will return 'false'.</p> <p>bool([Number])</p> <p>For a [Number] column, if the value is 0, the function will return false; otherwise, Any other value will return 'true'.</p> <p>If the value in the [Number] column is a decimal, the function will return 'false' if the decimal value is 0. Any other value will return 'true'.</p>		
float	Float	Return a floating-point number for an input value.
<p>float([Number])</p> <p>Convert the string representation of a floating-point number from the [Number] column into its numeric equivalent.</p> <p>If the value in [Number] column is '10,000.333', the function will return 10000.333.</p>		

int	Integer	Return the integer version for a string.
<p>int([Number])</p> <p>For a [Number] column, if the value is 10, the function will return 10;</p> <p>int([Text])</p> <p>For a [Text] column, if the value of [Text] is 123, the function will return the integer 123. If the value of [Text] cannot be converted to an integer (for example if it is a non-numeric string like 'hello'), the function may return an error.</p>		
string	String	Return the string version for an input value.
<p>string([Number])</p> <p>Create the string for the value in [Number] column.</p> <p>If the value in [Number] is 10, the function will return 10.</p>		
addDays	String	Add a specific number of days to a timestamp.
<p>addDays([Start Date], 10)</p> <p>Add 10 days to a [Start Date] column. If the [Start Date] is 2/15/2023, the function will return 2/25/2023.</p>		
addHours	String	Add a specific number of hours to a given timestamp.
<p>addHours([Start Time], 10)</p> <p>Add 10 hours to a [Start Time] column. If the [Start Time] is 2018-03-15T00:00:00, the function will return 2018-03-15T10:00:00.</p>		
addMinutes	String	Add a specific number of minutes to a timestamp.
<p>addMinutes([Start Time], 30)</p> <p>Add 30 minutes to a [Start Time] column. If the [Start Time] is 2018-03-15T00:00:00, the function will return 2018-03-15T00:30:00.</p>		
addSeconds	String	Add a specific number of seconds to a timestamp.
<p>addSeconds([Start Time], 10)</p> <p>Add 30 seconds to a [Start Time] column. If the [Start Time] is 2018-03-15T00:00:00, the function will return 2018-03-15T00:00:10.</p>		

addToTime	String	Add specified time units to a timestamp.
<p>addToTime([Start Time], 1, 'Day')</p> <p>Add 1 day to a [Start Time] column. If the [Start Time] is 2018-03-15T00:00:00, the function will return 2018-03-16T00:00:00.</p>		
dateDiffInSeconds	Integer	Return the difference between two DateTime and returns this difference as the number of seconds.
<p>dateDiffInSeconds([End Time], [Start Time])</p> <p>Calculate the difference between these two times in seconds. If the 'Start Time' is '2018-03-15T13:30:30Z', the 'End Time' is '2018-03-15T13:30:50Z', the function will return 20.</p>		
dateDiffInMinutes	Integer	Return the difference between two DateTime and returns this difference as the number of minutes.
<p>dateDiffInMinutes([End Time], [Start Time])</p> <p>Calculate the difference between these two times in minutes. If the 'Start Time' is '2018-03-15T13:30:00Z', the 'End Time' is '2018-03-15T13:40:00Z', the function will return 10.</p>		
dateDiffInHours	Integer	Return the difference between two DateTime and returns this difference as the number of hours.
<p>dateDiffInHours([End Time], [Start Time])</p> <p>Calculate the difference between these two times in hours. If the 'Start Time' is '2018-03-15T13:30:00Z', the 'End Time' is '2018-03-15T15:40:00Z', the function will return 2.</p>		
dateDiffInDays	Integer	Return the difference between two DateTime and returns this difference as the number of days.
<p>dateDiffInDays([End Date], [Start Date])</p> <p>Calculate the difference between these two times in days. If the 'Start Date' is '2018-03-15', the 'End Date' is '2018-03-18', the function will return 3.</p>		
dayOfMonth	Integer	Return the day of the month component from a timestamp.
<p>dayOfMonth([Start Time])</p> <p>Get the day of the month from the [Start Time] column. If the 'Start Time' is 2018-03-15T00:00:00, the function will return 15.</p>		

dayOfWeek	Integer	Return the day of the week component from a timestamp.
<p>dayOfWeek([Start Time])</p> <p>Get the day of the week from the [Start Time] column. If the 'Start Time' is 2018-03-15T00:00:00, the function will return 4.</p>		
dayOfYear	Integer	Return the day of the year.
<p>dayOfYear([Start Time])</p> <p>Get the day of the year from the [Start Time] column. If the 'Start Time' is 2018-03-15T00:00:00, the function will return 74.</p>		
parseDateTime	String	Return the timestamp from a string that contains a timestamp.
<p>parseDateTime([Date Time])</p> <p>Get a string from the [Date Time] column and convert it into a timestamp data type.</p> <p>If the [Date Time] column contains a string like '2022-01-01T00:00:00', the function will return a timestamp equivalent to January 1, 2022 at 00:00:00.</p>		
startOfDay	String	Return the start of the day for a timestamp.
<p>startOfDay([Date Time])</p> <p>Get the start of the day from the [Date Time] column.</p> <p>If the value of [Date Time] column is '2018-03-15T13:30:30Z', the function will return a timestamp equivalent to 2018-03-15T00:00:00Z.</p>		
startOfHour	String	Return the start of the hour for a timestamp
<p>startOfHour([Date Time])</p> <p>Get the start of the hour from the [Date Time] column.</p> <p>If the value of [Date Time] column is '2018-03-15T13:30:30Z', the function will return a timestamp equivalent to 2018-03-15T13:00:00.00Z.</p>		
startOfMonth	String	Return the start of the month for a timestamp.
<p>startOfMonth([Date Time])</p> <p>Get the start of the month from the [Date Time] column.</p>		

If the value of [Date Time] column is '2018-03-15T13:30:30Z', the function will return a timestamp equivalent to 2018-03-01T00:00:00.00Z.

subtractFromTime	String	Subtract a number of time units from a timestamp.
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subtractFromTime([Date Time], 1, 'Day')

Subtract 1 day from the [Date Time] column.

If the value of [Date Time] column is '2018-03-15T13:30:30Z', the function will return a timestamp equivalent to 2018-03-14T13:30:30Z.

isChanged	Boolean	Verify whether the value of a specific column has been altered in comparison with its latest version. It returns 'true' if the value has been changed, and 'false' if the value remains the same.
-----------	---------	---

isChanged([Status])

Suppose the current value of [Status] is 'To do'. If you change this value to 'Doing', the function will return true. If the value remains as 'To do', the function will return false.

Please note, for this function to work properly, versioning must be enabled in the list or library.

and	Boolean	Check whether all expressions are true. Return true when all expressions are true. Return false when at least one expression is false.
-----	---------	--

and(true, true)

Return true because both expressions are both true.

and(false, true)

Return false because one expression is false.

or	Boolean	Check whether at least one expression is true. Return true when at least one expression is true. Return false when all expressions are false.
----	---------	---

or(true, false)

Return true because at least one expression is true.

or(false, false)

Return false because both expressions are both false.

not	Boolean	Check whether an expression is false. Return true when the expression is false. Return false when the expression is true.
<p>not(false)</p> <p>Return true because the expression is false.</p> <p>not(true)</p> <p>Return false because the expression is true.</p>		
equals	Boolean	Check whether both values, expressions, or objects are equivalent. Return true when both are equivalent or return false when they're not equivalent.
<p>equals([Text], 'abc')</p> <p>Compare the value of the [Text] column with the string 'abc'.</p> <p>If the value in the [Text] column is 'abc', the function will return 'true'. If it is any other value, the function will return 'false'.</p>		
greater	Boolean	Check whether the first value is greater than the second value. Return true when the first value is more or return false when less.
<p>greater([Start Date], [Today])</p> <p>Compare the date of the [Start Date] and [Today] columns.</p> <p>If the [Start Date] is later than Today, it will return true. If the [Start Date] is the same day or earlier than Today, it will return false.</p>		
greaterOrEquals	Boolean	Check whether the first value is greater than or equal to the second value. Return true when the first value is greater or equal, or return false when the first value is less.
<p>greaterOrEquals([Start Date], [Today])</p> <p>Compare the date of the [Start Date] and [Today] columns.</p> <p>If the [Start Date] is the same day or later than Today, it will return true. If the [Start Date] is earlier than Today, it will return false.</p>		

less	Boolean	Check whether the first value is less than the second value. Return true when the first value is less or return false when the first value is more.
<p>less([Start Date], [Today])</p> <p>Compare the date of the [Start Date] and [Today] columns.</p> <p>If the [Start Date] is earlier than Today, it will return true. If the [Start Date] is the same day or later than Today, it will return false.</p>		
lessOrEquals	Boolean	Check whether the first value is less than or equal to the second value. Return true when the first value is less than or equal, or return false when the first value is more.
<p>lessOrEquals([Start Date], [Today])</p> <p>Compare the date of the [Start Date] and [Today] columns.</p> <p>If the [Start Date] is the same day or earlier than Today, it will return true. If the [Start Date] is later than Today, it will return false.</p>		
if	Any	Check whether an expression is true or false. Based on the result, return a specified value.
<p>if(equals([Text], 'abc'), 'yes', 'no')</p> <p>Compare the value of the [Text] column with the string 'abc' and return value.</p> <p>If the value in the [Text] column is 'abc', the function will return 'yes'. If it is any other value, the function will return 'no'.</p>		
add	Integer or Float	Return the result from adding two numbers.
<p>add([Number], 2)</p> <p>Add 2 to the value in the [Number] column.</p> <p>If the value in the [Number] is 2, the function will return 4.</p>		
div	Integer or Float	Return the result from dividing two numbers. The result from dividing the first number by the second number. If either the dividend or divisor has Float type, the result has Float type.
<p>div([Number], 2)</p>		

Divide the value in the [Number] column by 2.

If the value in the [Number] is 11, the function will return 2 in integer type, or 5.5 in float type.

max

Integer or Float

Return the highest value from a set of numbers or an array.

max([Number1], [Number2])

Get the highest value from [Number1] and [Number2] columns.

If the value in the [Number1] column is 10, the value in the [Number2] column is 5, the function will return 10.

min

Integer or Float

Return the lowest value from a set of numbers or an array.

min([Number1], [Number2])

Get the smallest value from [Number1] and [Number2] columns.

If the value in the [Number1] column is 10, the value in the [Number2] column is 5, the function will return 5.

mod

Integer or Float

Return the remainder from dividing two numbers.

mod([Number1], [Number2])

Get the remainder value when the value in the [Number1] column is divided by the value in the [Number2] column.

If the value in the [Number1] column is 3, the value in the [Number2] column is 2, the function will return 1.

mul

Integer or Float

Return the product from multiplying two numbers.

mul([Number1], [Number2])

Calculate the product of the values in the [Number1] and [Number2] columns.

If the value in the [Number1] column is 3, the value in the [Number2] column is 2, the function will return 6.

range

Array

Return an integer array that starts from a specified integer.

range([Number1], [Number2])

Create an integer array that starts from the value in the [Number1] column and includes the number of integers specified in the [Number2] column.

If the value in the [Number1] column is 1, the value in the [Number2] column is 4, the function will return [1, 2, 3, 4].

sub	Integer or Float	Return the result from subtracting the second number from the first number.
-----	------------------	---

sub([Number1], [Number2])

Subtract the value in the [Number2] column from the value in the [Number1] column.

If the value in the [Number1] column is 10.3, the value in the [Number2] column is 0.3, the function will return 10.

endsWith	Boolean	Check whether a string ends with a specific substring. Return true when the substring is found or return false when not found. This function is not case-sensitive.
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Endswith([Text], 'world')

Check if the value in the [Text] ends with the string 'world'.

If the value in the [Text] is 'hello world', the function will return true.

indexOf	Integer	Return the starting position or index value for a substring. This function isn't case-sensitive, and indexes start with the number 0. If the string isn't found, return the number -1.
---------	---------	--

indexOf([Text], 'world')

Find the starting index value of the substring 'world' in the [Text] column.

If the value in the [Text] is 'hello world', the function will return 6.

startsWith	Boolean	Check whether a string starts with a specific substring. Return true when the substring is found or return false when not found. This function isn't case-sensitive.
------------	---------	--

startsWith([Text], 'hello')

Check if the [Text] column starts with the "hello" substring.

If the value in the [Text] is 'hello world', the function will return true. If the value in the [Text] is 'Goodbye world', the function will return false, because it does not start with the substring "hello".

substring	String	Return characters from a string, starting from the specified position, or index. Index values start with the number 0
substring([Text], 6, 5) Create a five-character substring from the value in [Text] column, starting from the index value 6. If the value in the [Text] is 'hello world', the function will return 'world'.		
toLower	String	Return a string in lowercase format. If a character in the string doesn't have a lowercase version, that character stays unchanged in the returned string.
toLower([Text]) Convert the string in [Text] column to lowercase. If the value in the [Text] is 'Hello World', the function will return 'hello world'.		
toUpper	String	Return a string in uppercase format. If a character in the string doesn't have an uppercase version, that character stays unchanged in the returned string
toUpper([Text]) Convert the string in [Text] column to uppercase. If the value in the [Text] is 'Hello World', the function will return 'HELLO WORLD'.		

The BoostSolutions' Alert Reminder provides the following operators:

Operator	Description
+	Plus
-	Minus
%	remainder
*	Multiplied by
/	Divided by

==	Is equal to
!=	Is not equal to
!	Is not
<	Is less than
<=	Is less than or equal to
>	Is greater than
>=	Is greater than or equal to
&&	AND
	OR

Subscription Management

You can use the BoostSolutions' Alert Reminder trial subscription for a period of 30 days from the day you first use it, without any functional limitations.

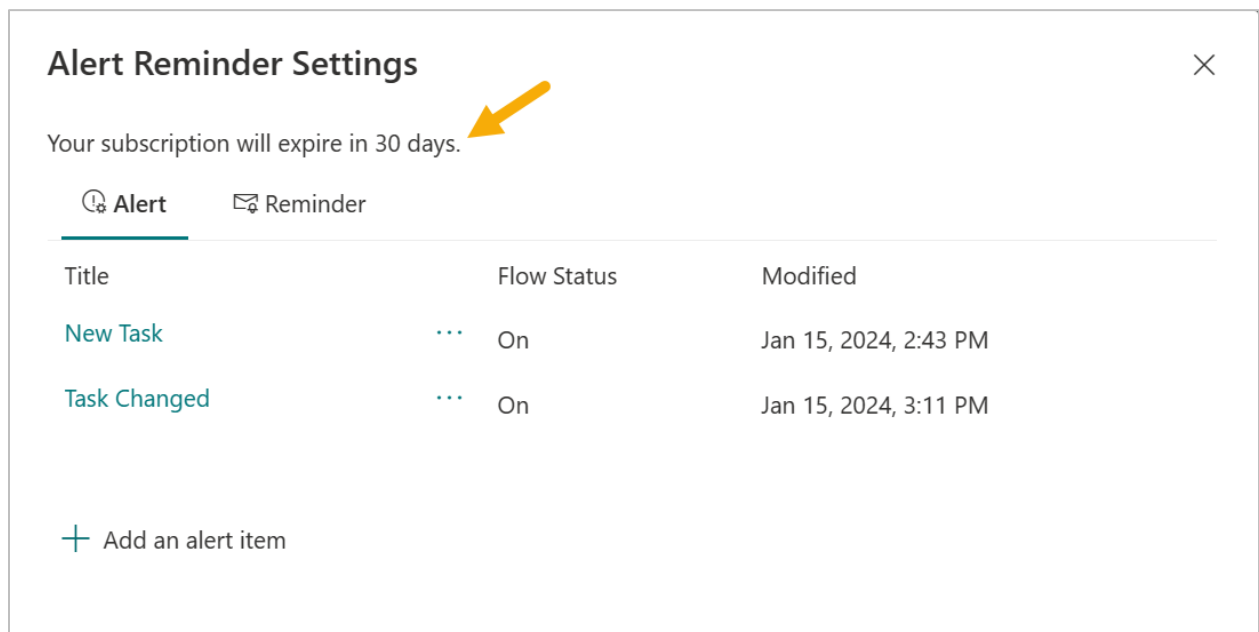
When the trial subscription period ends, you will need to buy a subscription.

The subscription for the BoostSolutions' Alert Reminder is per site (previously 'site collection') or tenant, and it is billed annually.

A site collection subscription allows all its users access to the app, while a tenant subscription grants access to all users across all sites or site collections within the tenant.

Check Subscription Status



- a. When you open the Alert Reminder dialog, the subscription status is displayed at the top of the dialog. If the subscription is about to expire within 30 days, the notification message will display the remaining days.



- b. To update the subscription status, click on the notification. In the License Information dialog that appears, click the refresh icon next to the expiration date to load the updated status.

License Information



Your subscription will expire in 30 days.

Tenant ID:	ae586225-a936-4e32-b424-6a57e257cf0c
Site ID:	{6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}
Site Url:	https://bsmark.sharepoint.com/sites/TutorialWeb...
Product:	BoostSolutions Aler Reminder 1.0.24.202 
License Type:	Trial
Expiration Date:	02/21/2024 

- c. Once the subscription status changes to "Your subscription has expired on mm/dd/yyyy", it indicates that your subscription is no longer active.

License Information




Your subscription has expired on 01/20/2024.

Tenant ID:	ae586225-a936-4e32-b424-6a57e257cf0c
Site ID:	{6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}
Site Url:	https://bsmark.sharepoint.com/sites/TutorialWeb...
Product:	BoostSolutions Aler Reminder 1.0.24.202 
License Type:	Trial
Expiration Date:	01/20/2024 

- d. To purchase a new subscription or renew an existing one, please email us at sales@boostsolutions.com with your Site URL, Site ID, or Tenant ID.
- e. If you purchase a site (formerly site collection) subscription, the license status will reflect this with the license type listed as 'Site'.

License Information

Your subscription will expire in 364 days.

Tenant ID:	ae586225-a936-4e32-b424-6a57e257cf0c
Site ID:	{6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}
Site Url:	https://bsmark.sharepoint.com/sites/TutorialWeb...
Product:	BoostSolutions Aler Reminder 1.0.24.202 
License Type:	Site 
Expiration Date:	01/20/2025 

- f. If you opt for a tenant subscription, your license status will list the license type as 'Tenant'.

License Information





Your subscription will expire in 339 days.

Tenant ID: ae586225-a936-4e32-b424-6a57e257cf0c

Site ID: {6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}

Site Url: <https://bsmark.sharepoint.com/sites/TutorialWeb...>

Product: BoostSolutions Aler Reminder 1.0.24.202 

License Type: Tenant 

Expiration Date: 01/06/2025 