Alert Reminder Boost 3.0

User Guide

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Our web site: https://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:

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

2. Installation

2.1 Product Files

After you download and unzip the Alert Reminder Boost file from https://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.
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.
Library\4.6\Setup.exe	The product installer for .Net Framework 4.6.
Library\4.6\Setup.exe.config	A file containing the configuration information for the installer.
Solutions\Foundtion\ BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundtion\ BoostSolutions.FoundationSetup16.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2016/2019/Subscription Edition.
Solutions\Foundtion\Install.config	A file containing the configuration information for the installer
Solutions\AlertReminder\ BoostSolutions.AlertReminderSetup15.3.wsp	A SharePoint solution package containing Alert Reminder Boost files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\AlertReminder\ BoostSolutions.AlertReminderSetup16.3.wsp	A SharePoint solution package containing Alert Reminder Boost files and resources for SharePoint 2016/2019/Subscription Edition.
Solutions\AlertReminder\Install.config	A file containing the configuration information for the installer.

2.2 Software Requirements

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

SharePoint Server Subscription Edition

Operating System	Windows Server 2019 Standard or Datacenter Windows Server 2022 Standard or Datacenter
Server	Microsoft SharePoint Server Subscription Edition
Browser	Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2019

Operating System	Windows Server 2016 Standard or Datacenter Windows Server 2019 Standard or Datacenter
Server	Microsoft SharePoint Server 2019
Browser	Microsoft Internet Explorer 11 or above Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2016

Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2016 Standard or Datacenter
Server	Microsoft SharePoint Server 2016 Microsoft .NET Framework 4.6
Browser	Microsoft Internet Explorer 10 or above Microsoft Edge Mozilla Firefox Google Chrome

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 Microsoft Edge Mozilla Firefox Google Chrome

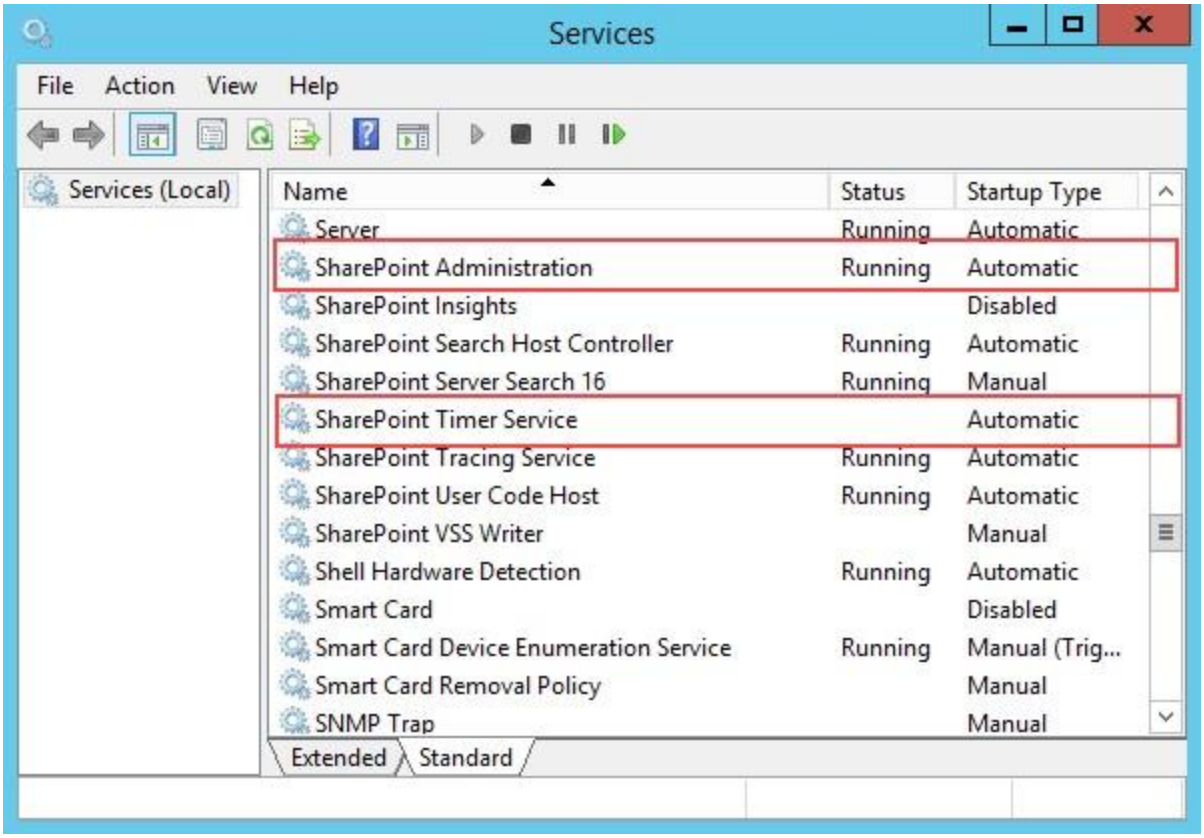
2.3 Installation

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 you 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.

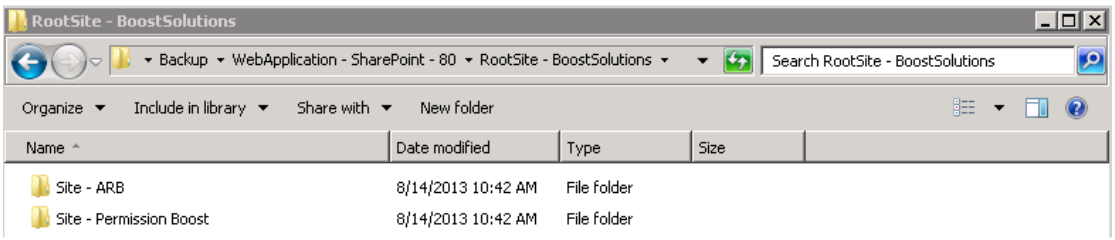
c. A system check is performed to verify if your machine meets all the requirements for using this tool. After the system check is finished, click **Next** to proceed with the migration tool.

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 in SharePoint 2010 using the SharePoint STSADM command line tool.

Required permissions

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

Install Alert Reminder Boost to SharePoint Servers

a. Extract the files from the product zip pack to a folder on one SharePoint server.

b. Open a command prompt and make sure your path is set with the SharePoint bin directory.

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

stsadm -o addsolution -filename BoostSolutions.AlertReminderSetup16.3.wsp

stsadm -o addsolution -filename BoostSolutions.FoundationSetup16.1.wsp

d. Deploy the added solution with the following command:

stsadm -o deploysolution -name BoostSolutions.AlertReminderSetup16.3.wsp -allowgacdeployment –url [virtual server url] –immediate

stsadm -o deploysolution -name BoostSolutions.FoundationSetup16.1.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.AlertReminderSetup16.3.wsp

stsadm -o displaysolution -name BoostSolutions.FoundationSetup16.1.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

Note:

After install product using command line, you can check whether the product is installed and deployed successfully in Central Administration.

a. On the Central Administration Home page, click **System Settings**.

b. In the Farm Management section, click **Manage farm solutions**.

c. On the Solution Management page, check whether the solution

"BoostSolutions.AlertReminderSetup16.3.wsp" is deployed to the web applications.

d. On the Solution Properties page, click **Deploy Solution**.

e. On the Deploy Solution page, in the Deploy When section, select **Now**.

f. In the Deploy To? section, in the A specific web application list, click either All web applications or select a specific Web application.

g. Click **OK**.

Remove Alert Reminder Boost from SharePoint Servers

a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.AlertReminderSetup16.3.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.AlertReminderSetup16.3.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.AlertReminderSetup16.3.wsp
```

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.FoundationSetup16.1.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.FoundationSetup16.1.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.FoundationSetup16.1.wsp
```

2.7 Feature Activation

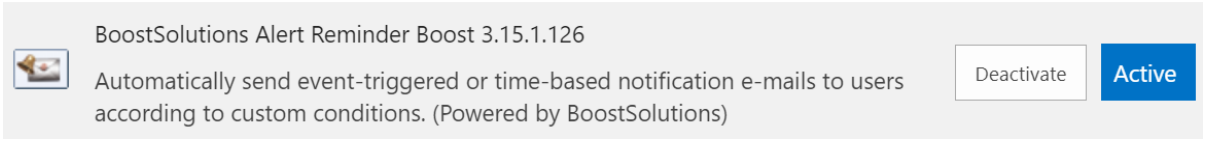
Activate features in Site Collection

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

a. Go to **Site Settings** page.

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**.



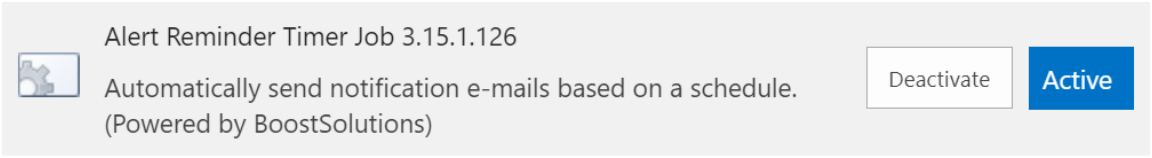
Activate Alert Reminder Timer Job in Central Administration

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**.

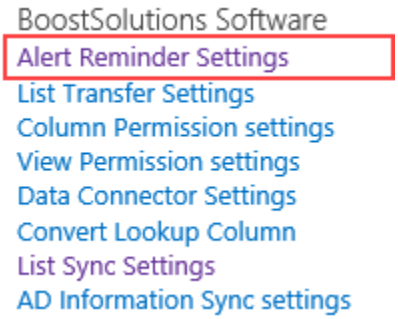

Alert Reminder Timer Job 3.15.1.126
Automatically send notification e-mails based on a schedule. (Powered by BoostSolutions)
Deactivate
Active

3. Getting Started with Alert Reminder Boost

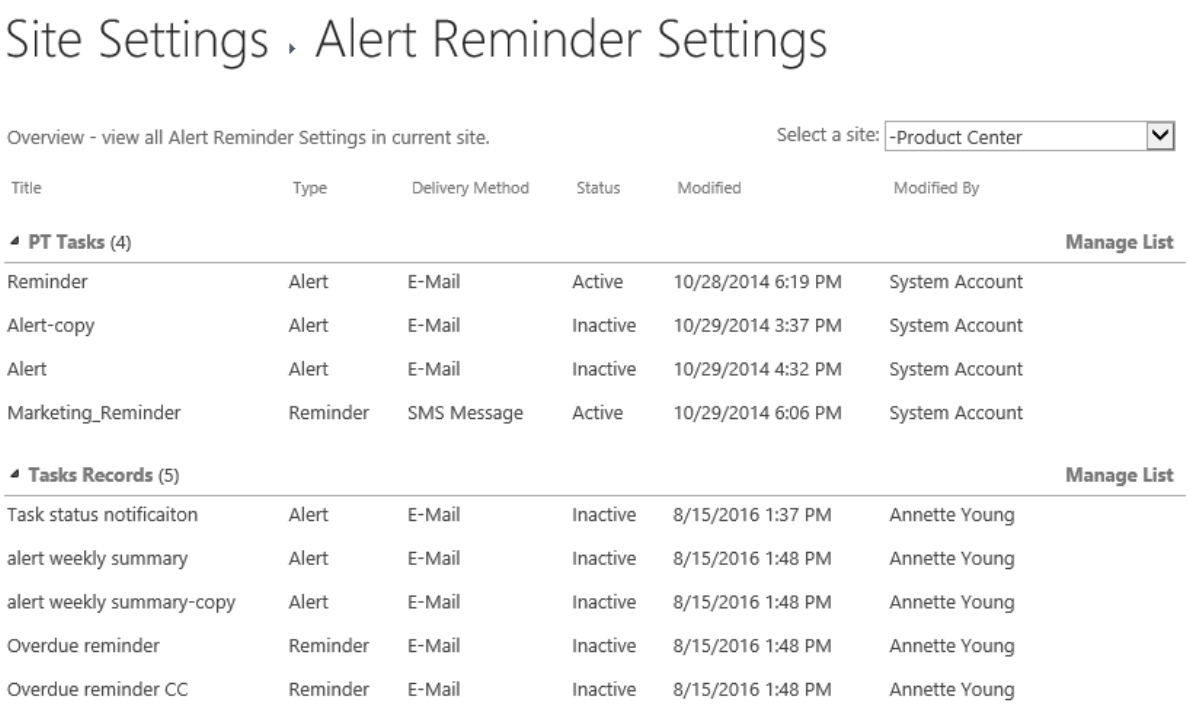
There are three entrances to access the Alert Reminder Boost page, both require users to have the appropriate permissions.

- Entering from Site Settings

Go to **Site Actions | Site Settings** and then click **Alert Reminder Settings** under **BoostSolutions Software**. You will enter the Alert Reminder Settings page.



In the Alert Reminder Settings page, all list alert and reminder items are listed in the page as following:

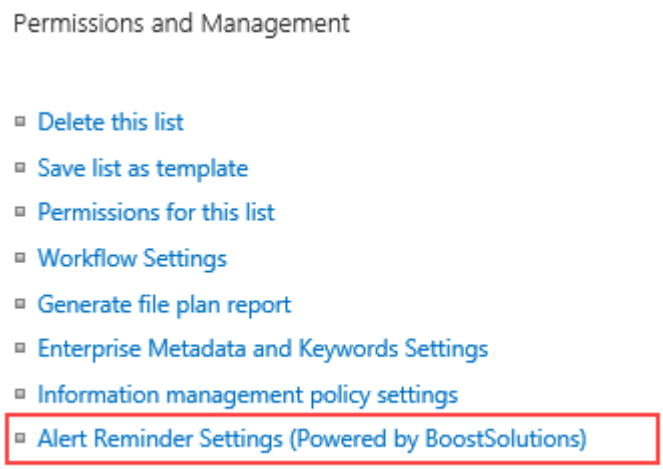


To view the alert or reminder items of other sites, select the site name from the drop-down list in top right corner.

To manage an alert or reminder item, click **Manage List** link of each list or library.

➢ Entering from List Settings

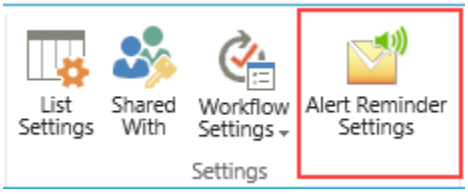
Go to the list settings and find the entry **Alert Reminder Boost** under the **Permissions and Management** section.



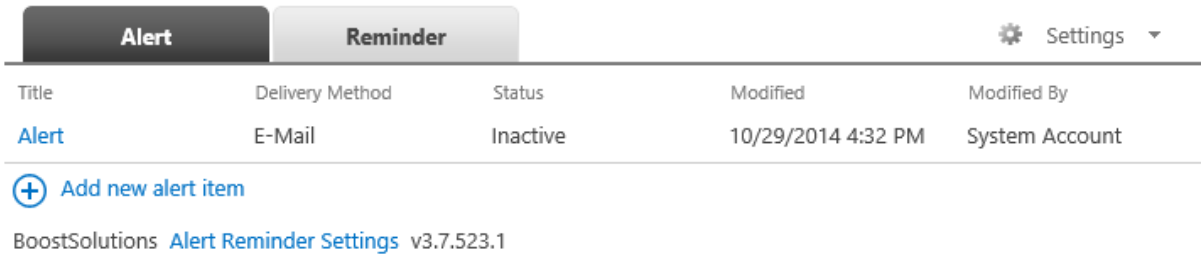
Note To configure Alert Reminder Boost settings, you must have at least **Design** Permission level.

➢ Entering from Ribbon Command

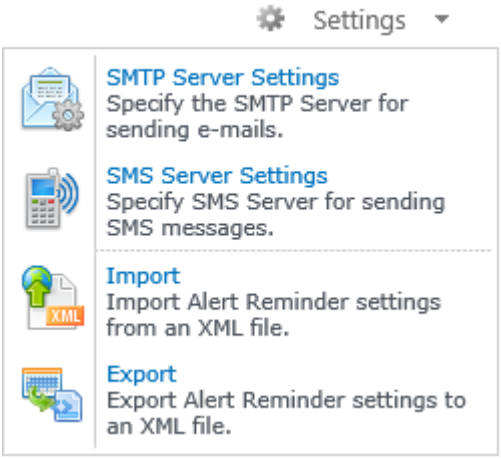
After you install Alert Reminder Boost on the SharePoint Server, you will find Alert Reminder Boost on the Ribbon.



If you enter Alert Reminder Settings page from list, 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.



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



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

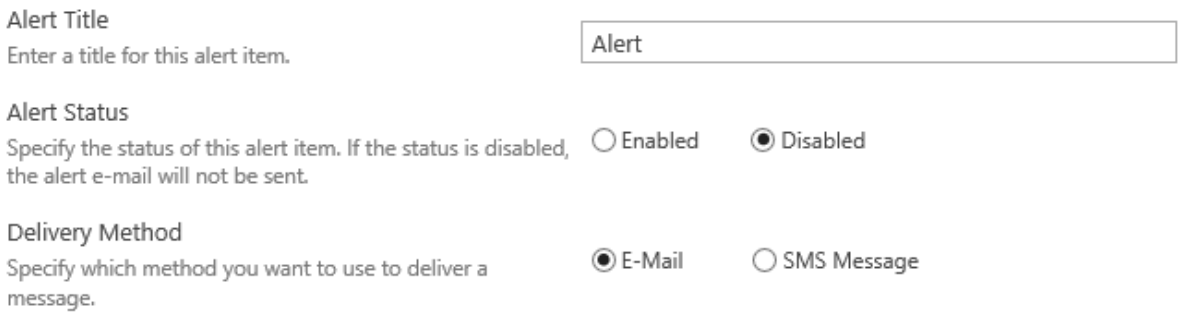
SMS Server Settings: Specify the SMS Server for sending SMS messages.

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 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.

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

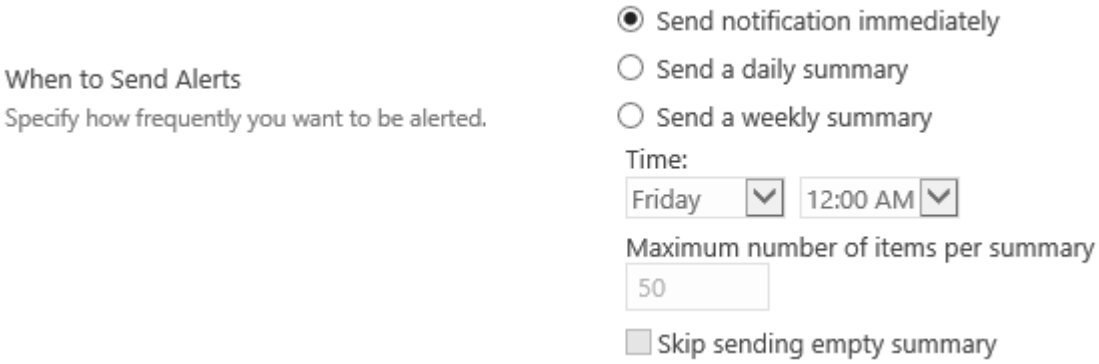
When new items are added: An alert will be generated when an item is created in the list.

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 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**.

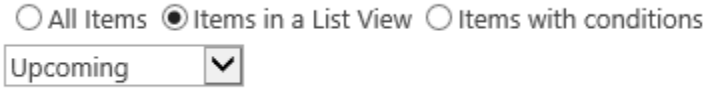
> ***Note*** For SMS Messages, you can only select Send notification immediately.

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.

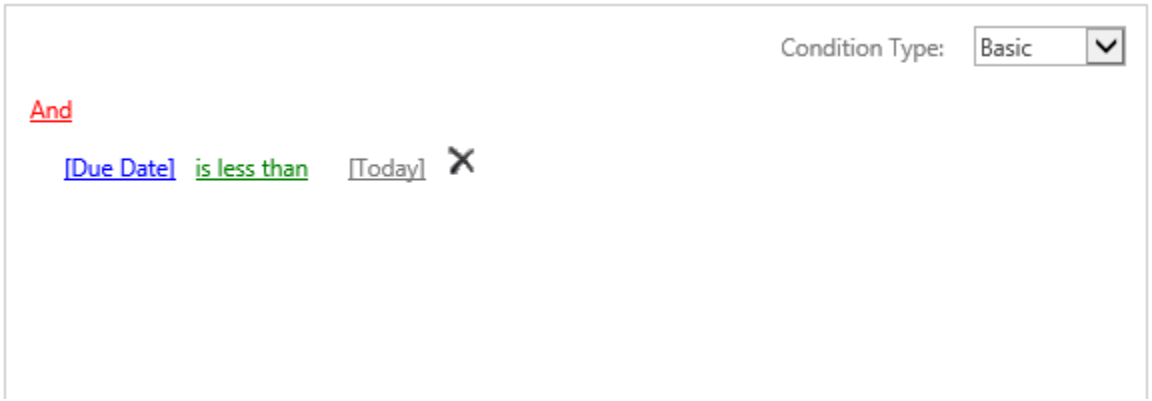
All Items: All items in the current list.

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

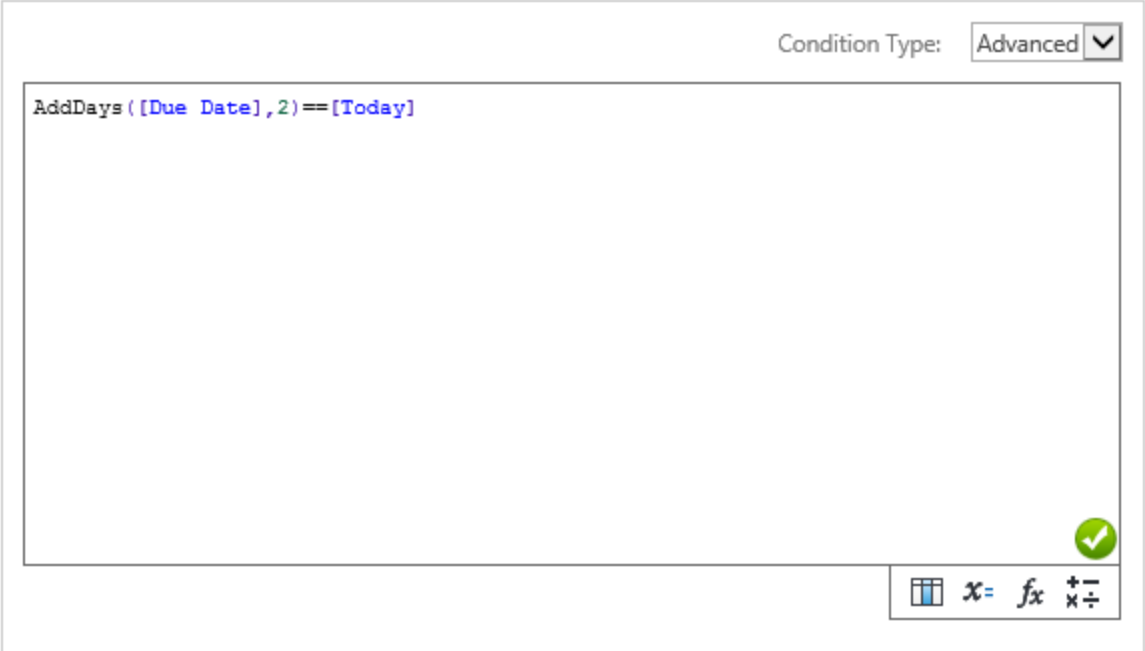


Items with conditions: Items that meet certain conditions. In the Condition Type menu, select either Basic or Advanced from the drop down list.

Basic Mode:



Advanced Mode:



> ***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.

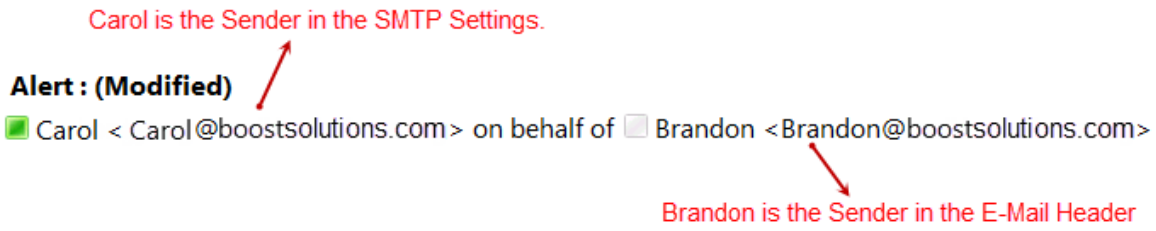
From...	Specify the email Sender. For more information please refer to: *Specify the Sender*.
To..., CC... and BCC...	Specify the Recipient, CC and BCC fields. For more information please refer to: *Specify the Recipient, CC and BCC Fields*.
Exclusion...	Specify the persons you want to exclude from receiving 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:



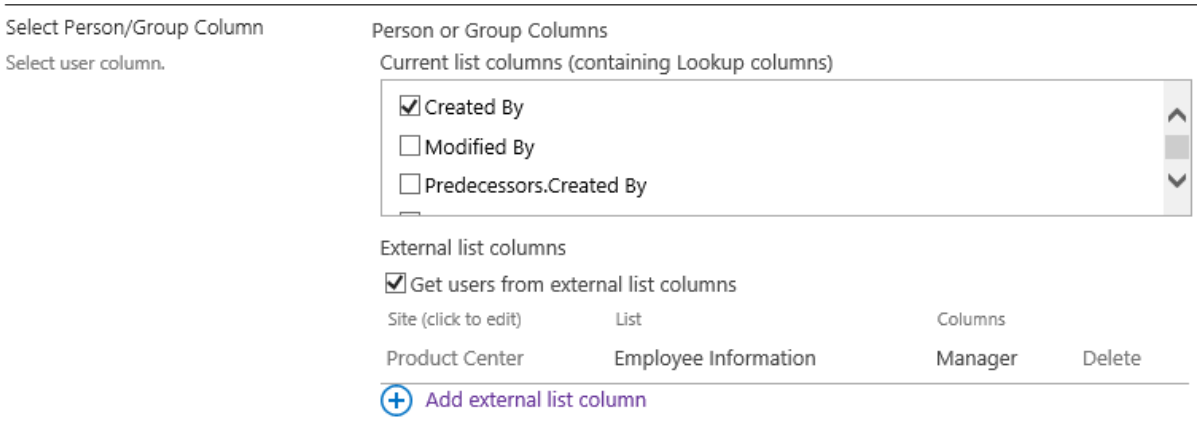
Specify the Recipient, CC and BCC Fields

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

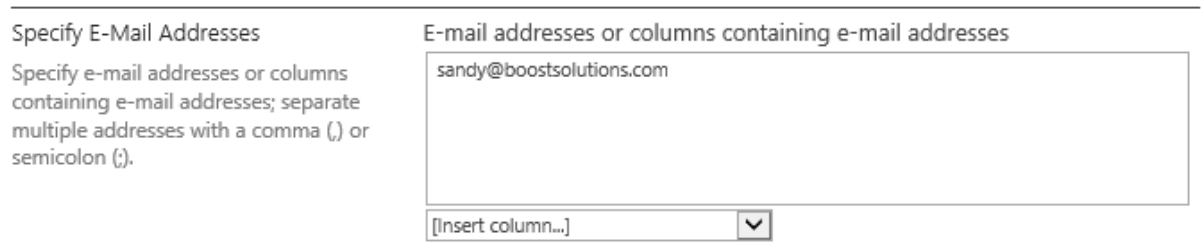
First click **To...** and a dialog box will appear.

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

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.

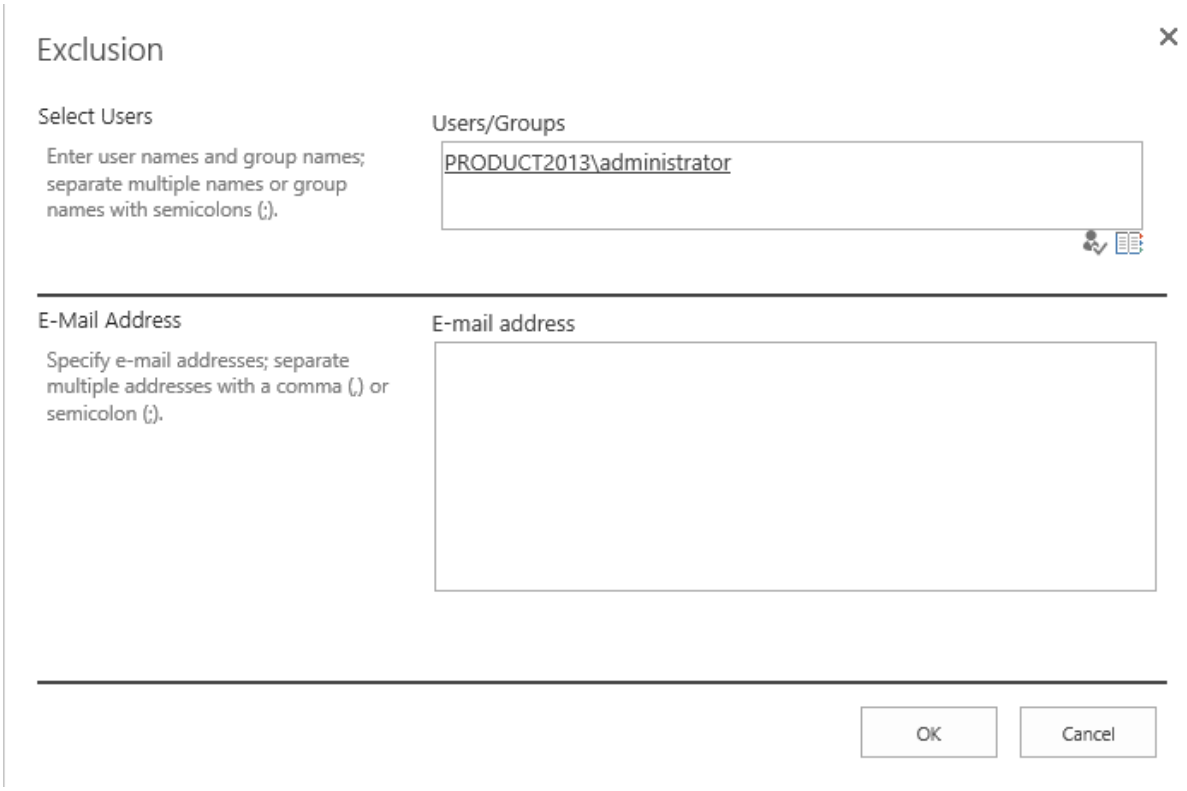


In the **Specify E-Mail Address** section, you can input email addresses directly or insert columns that contain email addresses.



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**.

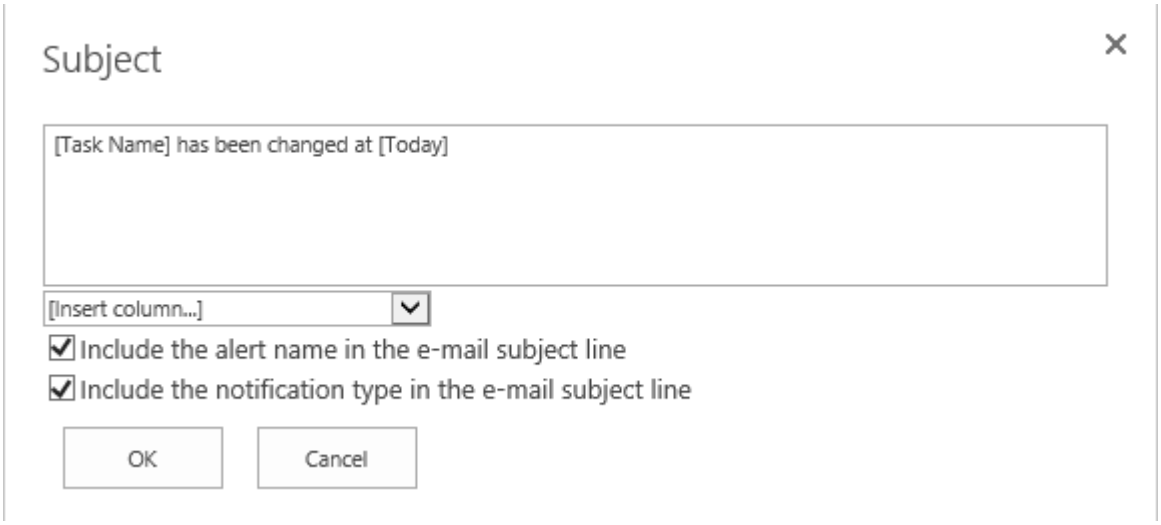


Set the Email Subject

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.

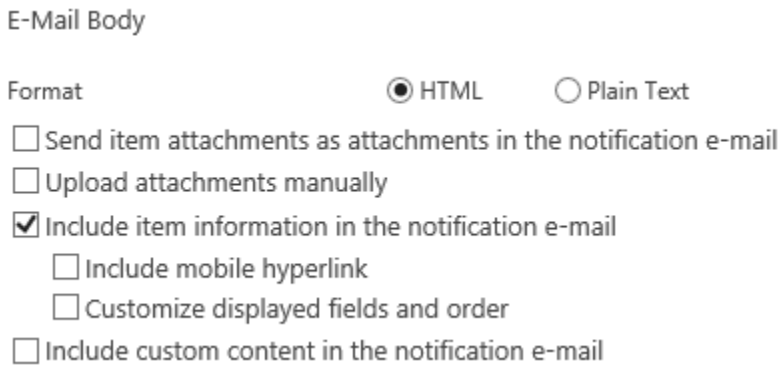
Include the alert name in the e-mail subject line: Select this option to add the alert name to the subject line.

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.



E-Mail Body

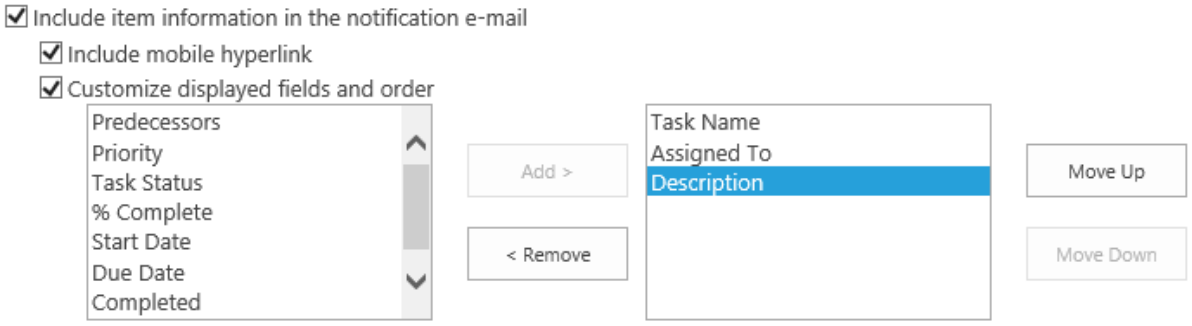
The E-Mail Body section allows you to set up the email itself.



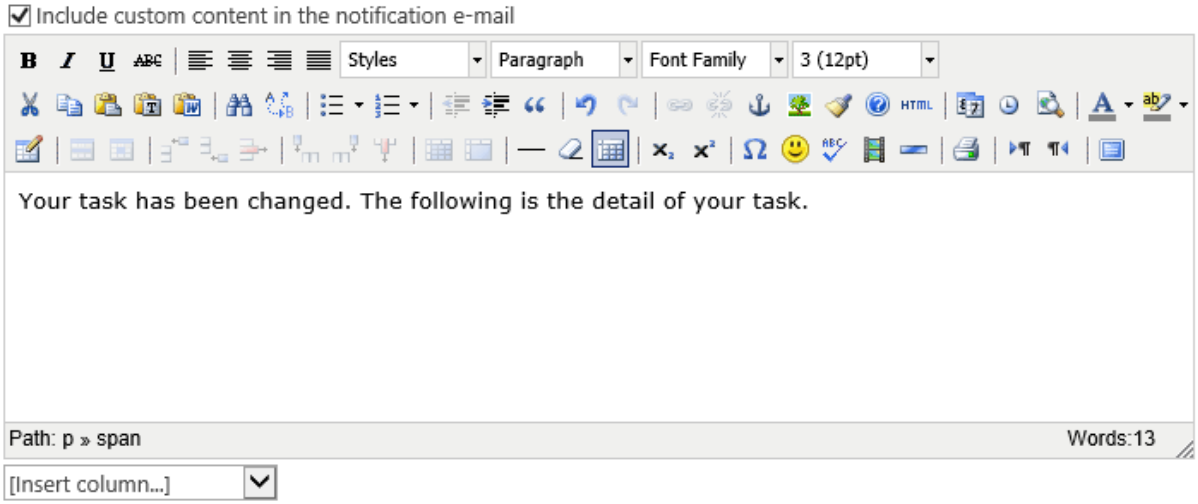
Format: You can select either **HTML** or **Plain Text**.

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.



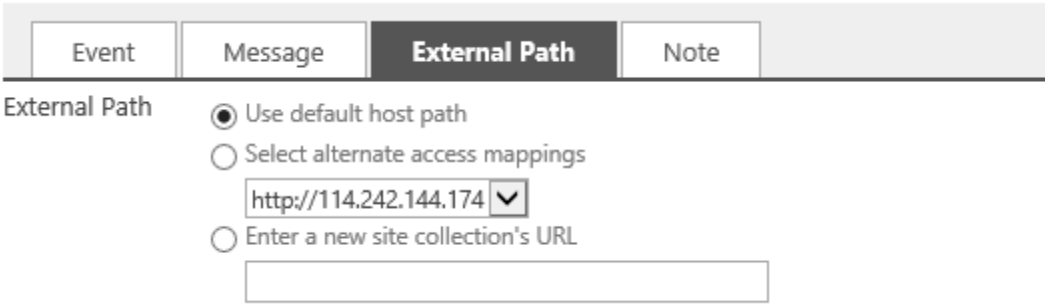
Include custom content in the notification e-mail: Select this option to enter customized content in the notification email. This content will appear under the list navigation in the notification email.



> ***Note:*** For SMS Messages you need to enter the message content. You are also allowed to insert list columns into the message content.

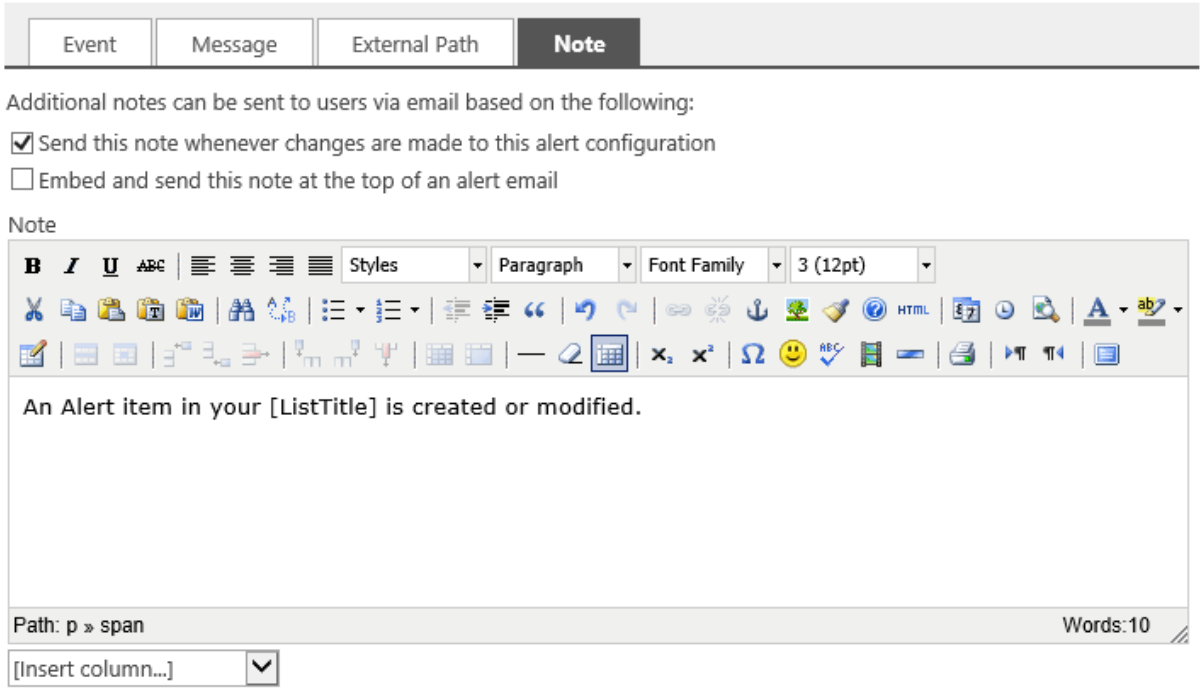
4.3 External Path

The External Path tab allows you to set different external paths to your web application. You can choose to use the default host path, select from one of the custom alternative access mappings or 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.



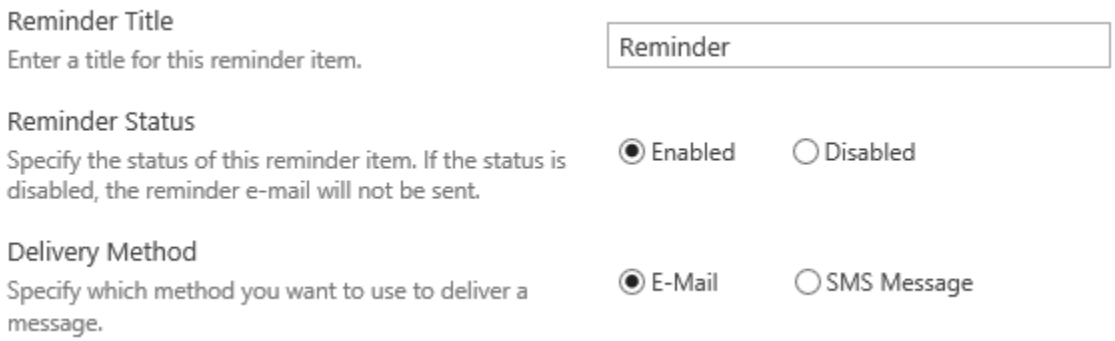
Send a note informing users every time you click OK in the New/Edit Alert Item Page: Select this option to send notification emails to users every time you create a new alert item or modify an alert item.

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 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.

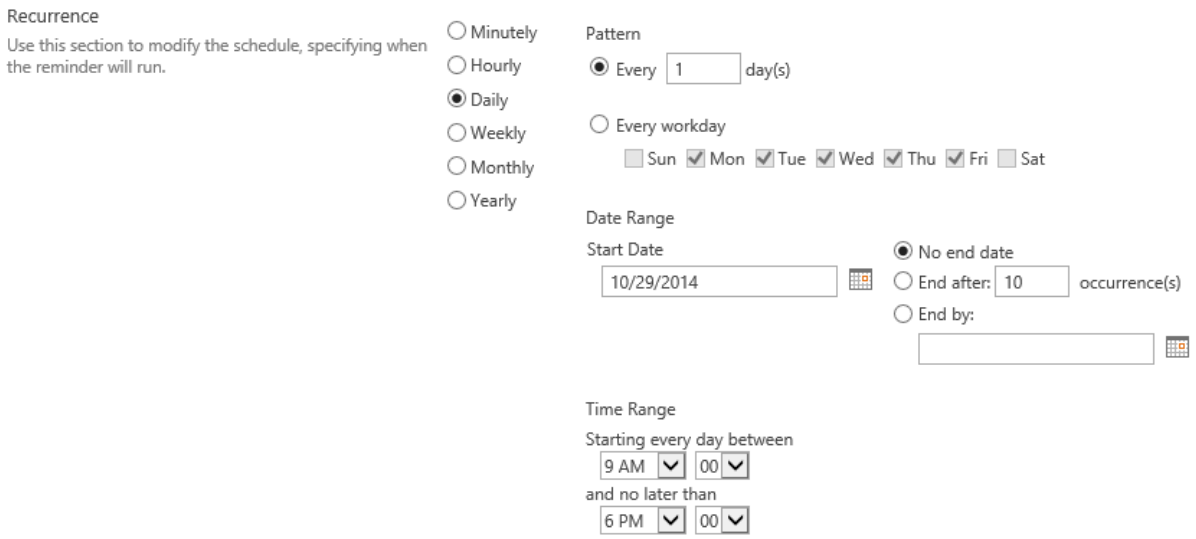
The New Reminder Item page also contains the following 4 tabs for configuring the new Reminder: **Schedule**, **Message**, **External Path and Note**.

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**.

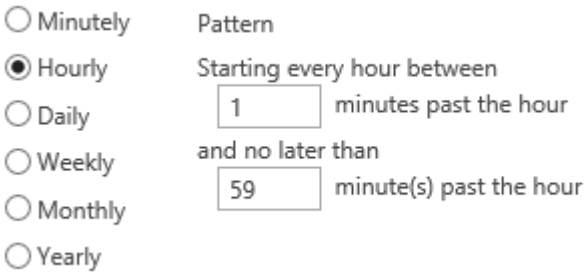
Recurrence

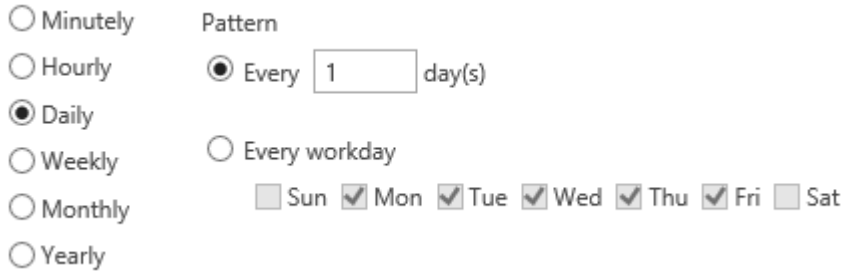
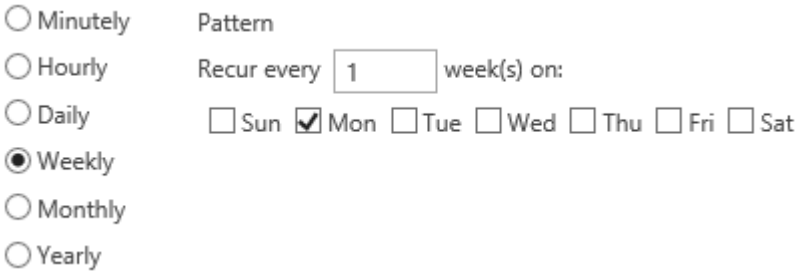
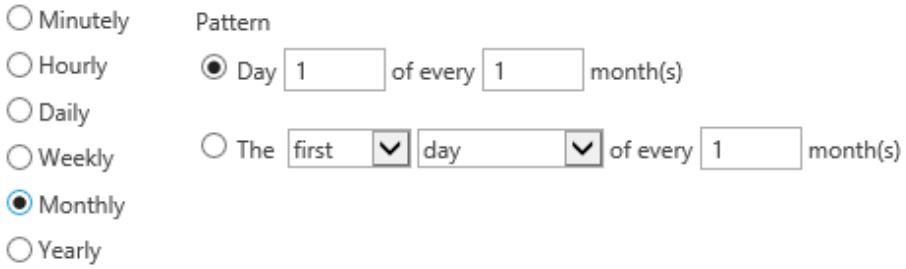
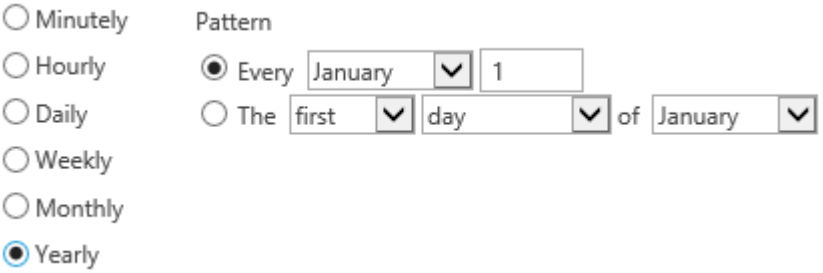
In this section, you can specify how often and when you want to be reminded. There are three options for you to configure: **Pattern**, **Date Range** and **Time Range**.



Pattern

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

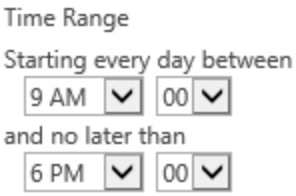
Minutely	
Hourly	

Daily	
Weekly	
Monthly	
Yearly	

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.



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.

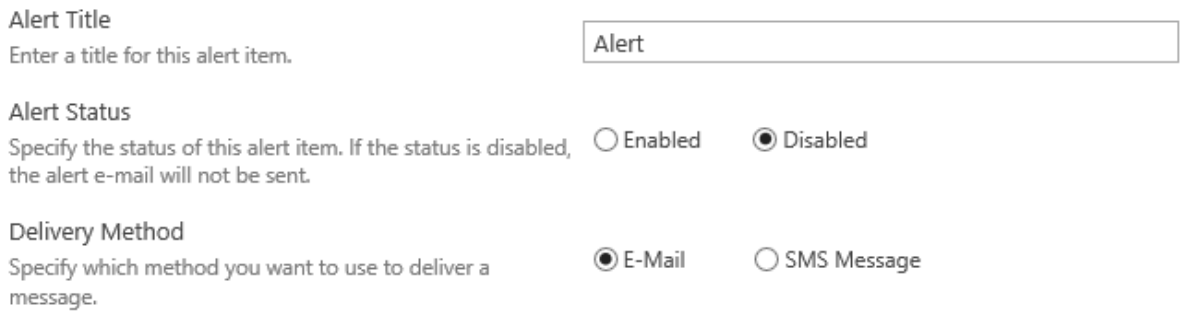
6. Manage Alert Reminder Items

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.

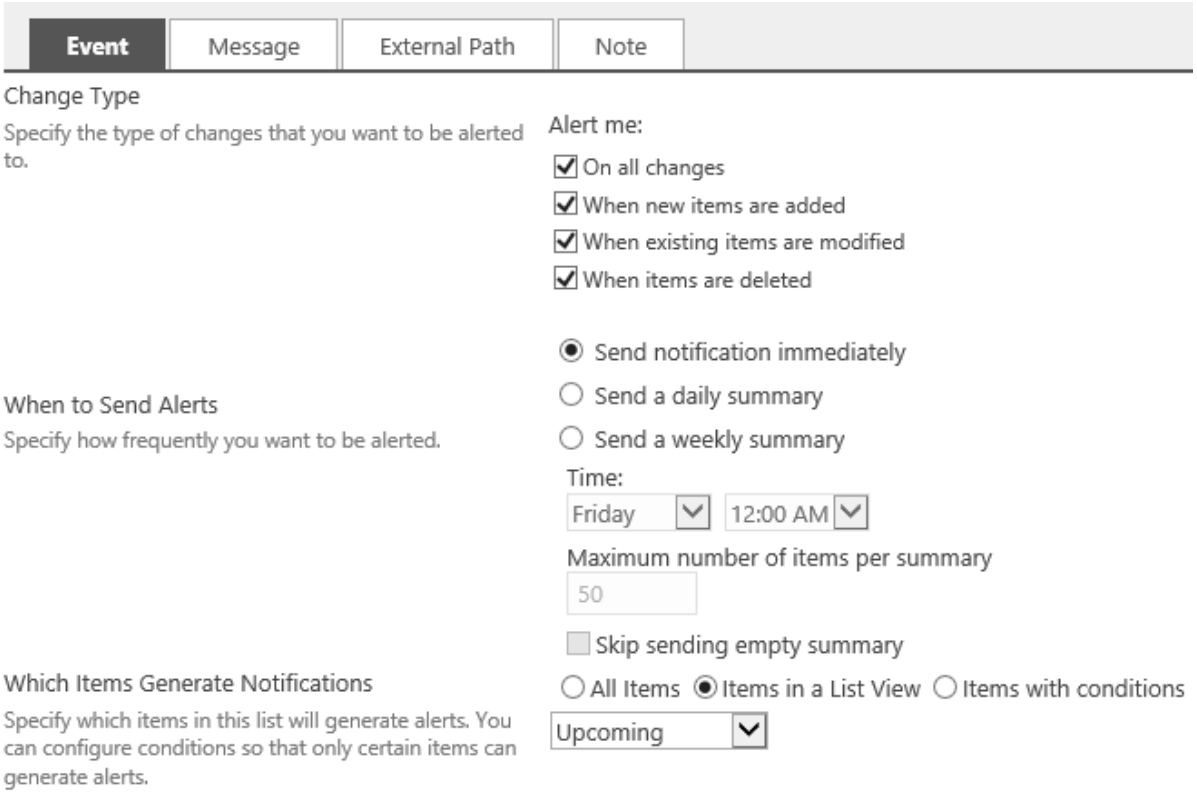
6.1 Create an Alert Item

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

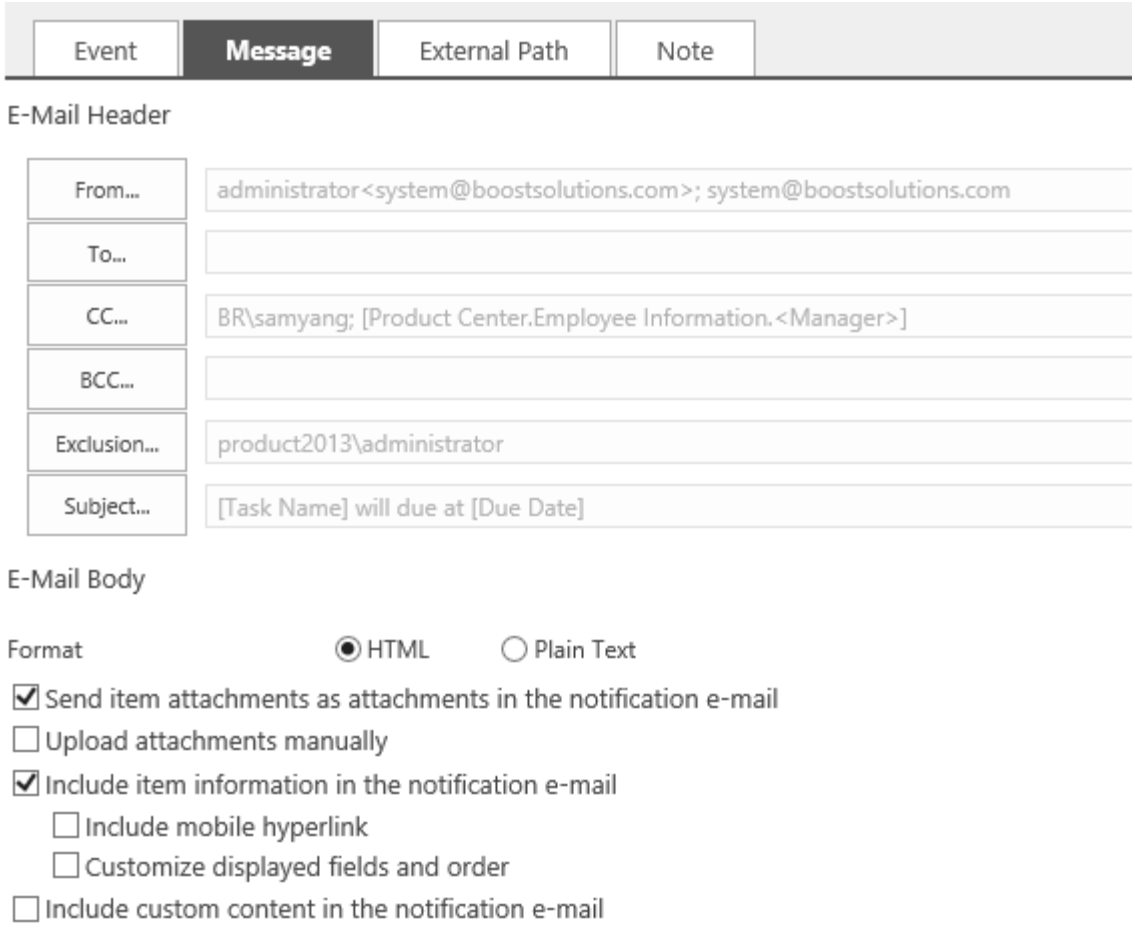
b. In the New Alert Item page enter a title for your Alert item, select if you want to enable this Alert item, and select a Delivery Method.



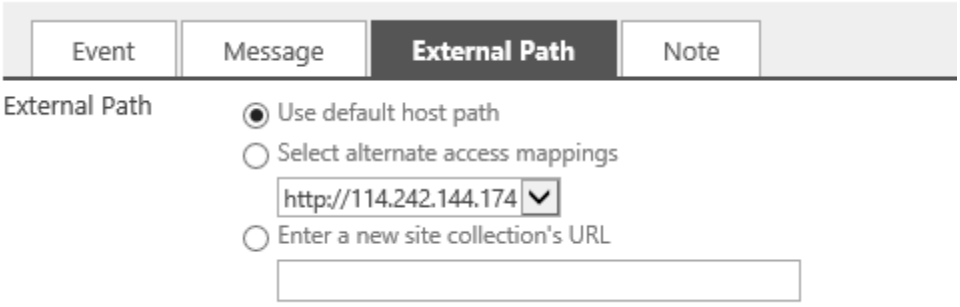
c. In the Event tab, you need to specify the Alert triggers, when to send Alerts and which items in the list will generate an Alert.



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



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



f. The Note tab is optional. In this tab you can send an email notification to select users informing them of new Alert items.

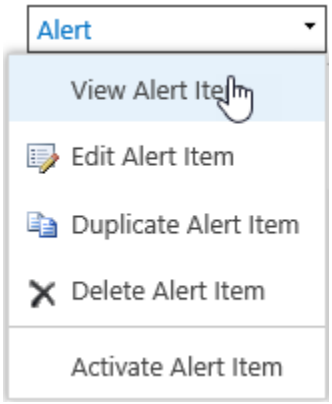
g. Click **OK** to save the Alert item.

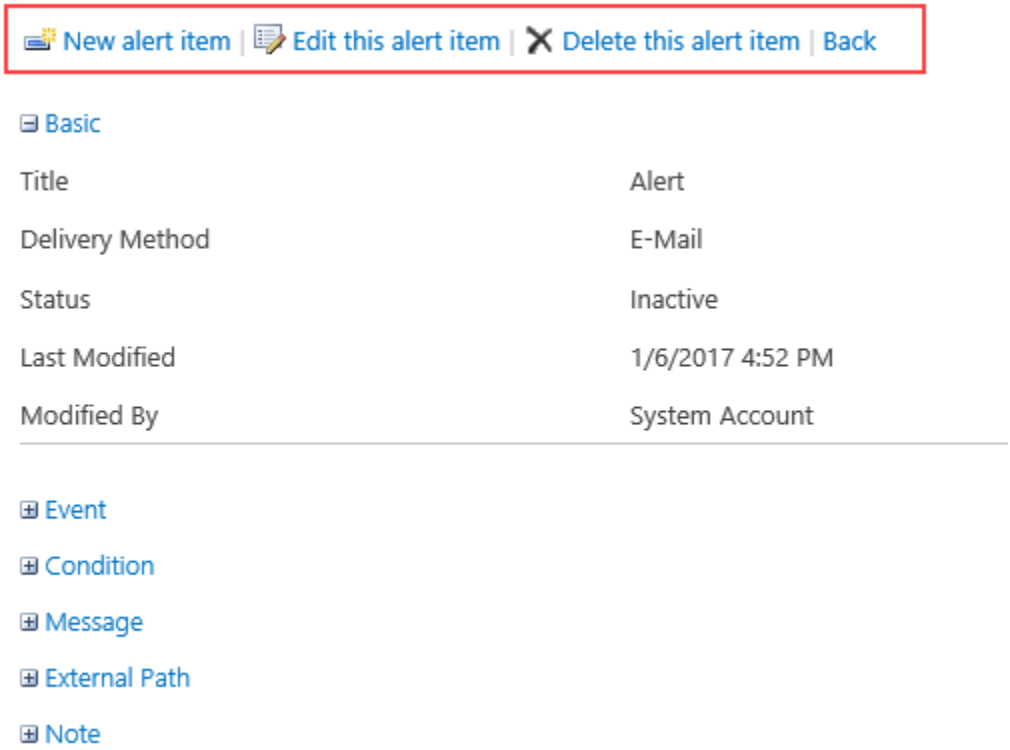
6.2 View an Alert Item

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.

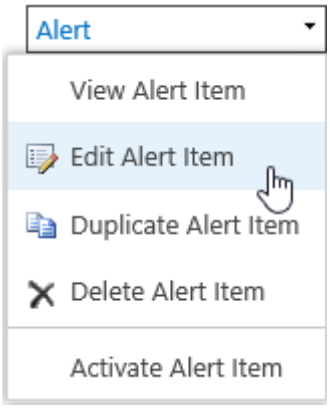
From the View Alert Item page you can create a new Alert item, enter the edit the Alert item and delete the Alert item.





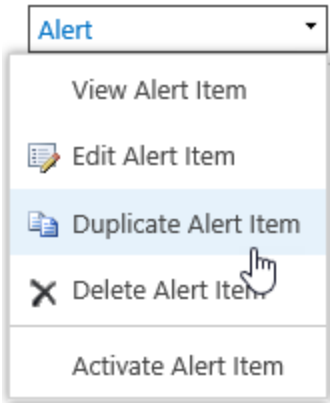
6.3 Edit an Alert Item

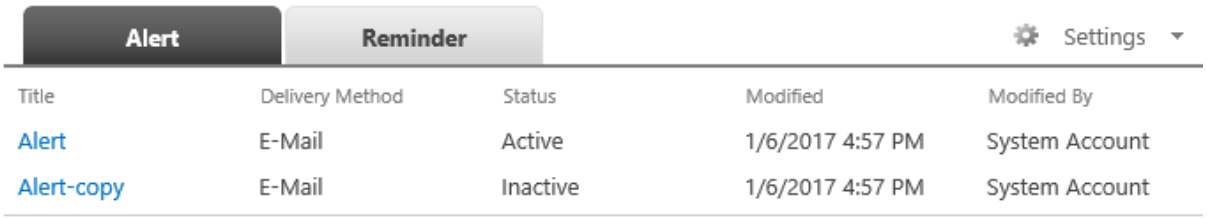
To edit an alert item in the Alert Reminder Boost Settings page, click the **Edit Alert Item** from the drop down menu to enter the Edit Alert Item page. Make your changes and then click **OK** to save the changes.



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.

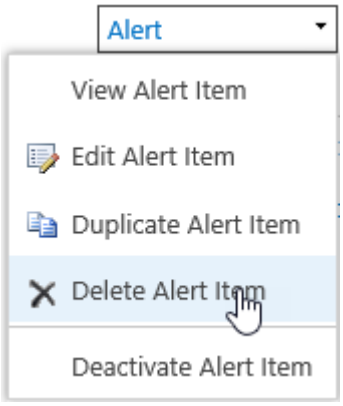




Note: The newly created duplicate Alert item will be deactivated by default.

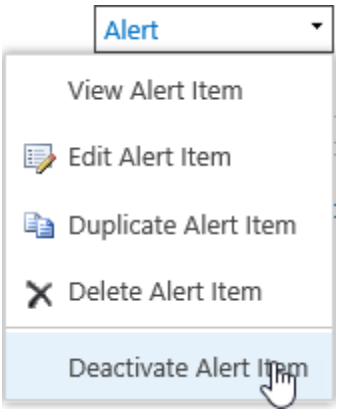
6.5 Delete an Alert Item

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.

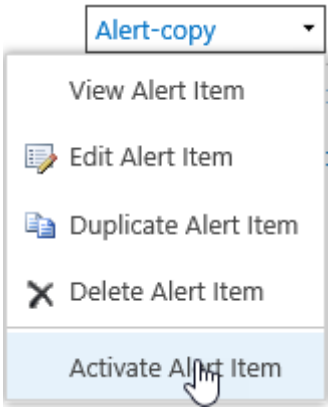


6.6 Deactivate or Activate an Alert Item

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**.



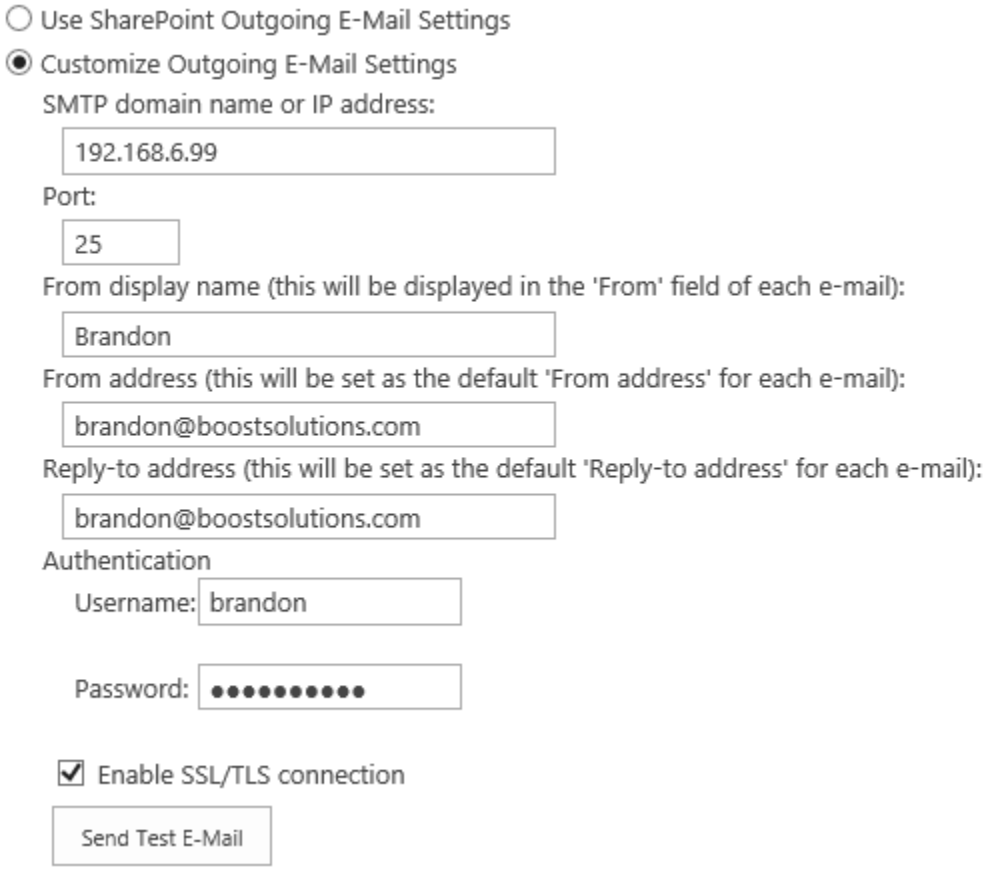
To activate an Alert item, hover over an Alert item you want to activate to reveal a drop down menu and select **Activate Alert Item**. The status of the Alert item will change to **Active**.


Alert-copy
View Alert Item
Edit Alert Item
Duplicate Alert Item
Delete Alert Item
Activate Alert Item

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.



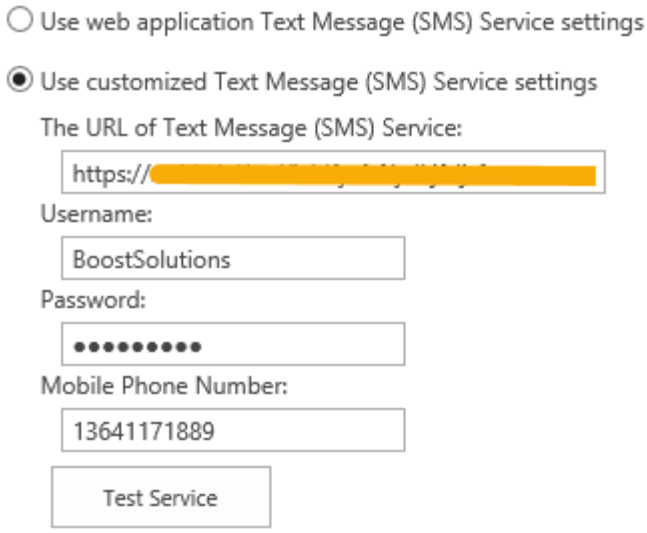
- **SMTP domain name or IP address**: Enter the name or IP address of your email server.
- **Port**: Enter the port number.
- **From display name**: Enter the email display name (optional).
- **From address**: Enter an email address.
- **Reply-to address**: Enter an email address (optional).
- **Authentication**: 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.



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.

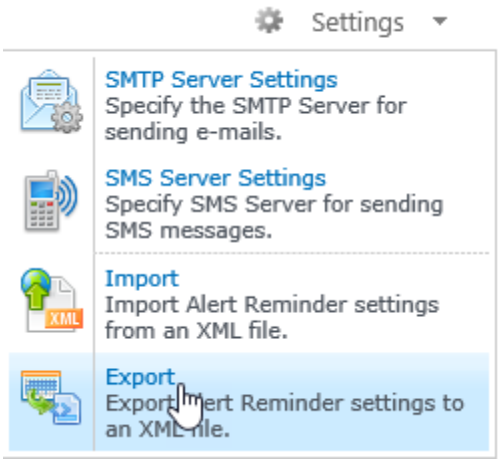
7.3 Export and Import Alert Reminder Items

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.

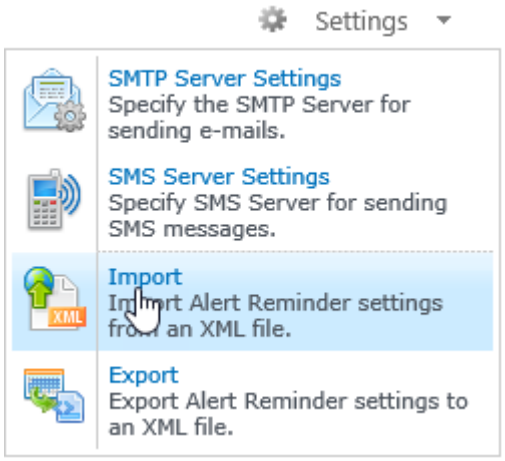


b. An **Export Settings to XML** dialog box will appear, click **Save** to save the XML file to your local computer.

7.3.2 Import

To import Alert Reminder items:

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



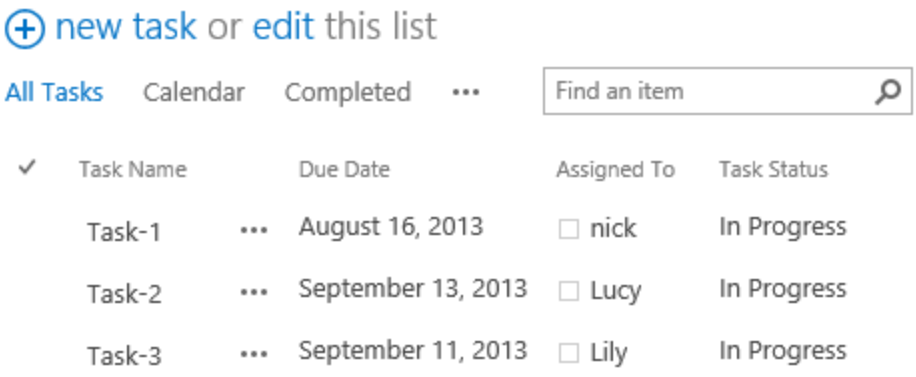
b. An **Import** Settings dialog box will appear, click **Browse** to choose a XML file that contains Alert Reminder items or you can paste the code directly.

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.



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

a. Click on the **Alert Reminder Boost** button under the List tab on the ribbon.

b. In the Alert Reminder Settings page, click the **Alert** tab and then click **Add new alert item**.

c. Fill in the basic settings for this Alert item:

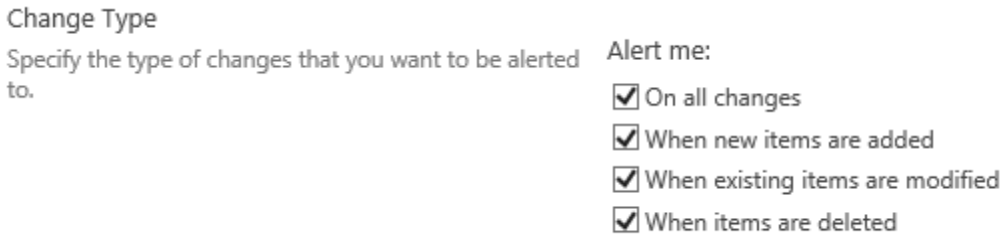
Alert Title: Enter a title for this alert item.

Alert Status: Specify the status of this alert item.

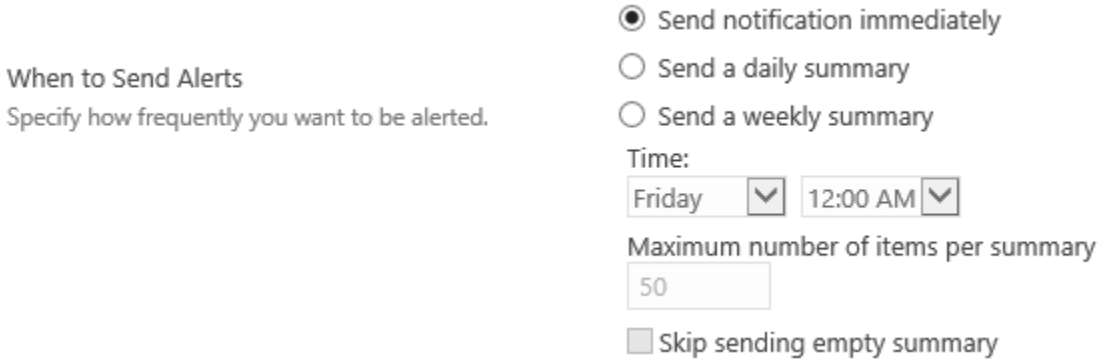
Delivery Method: Specify the method you want to use.

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

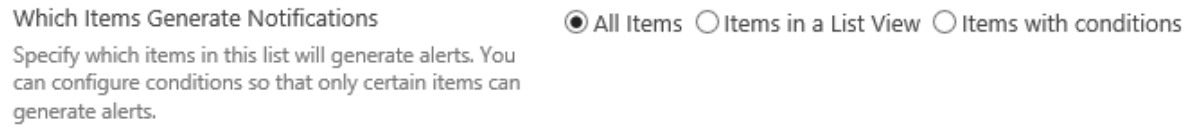
Change Type: Select **On all changes**.



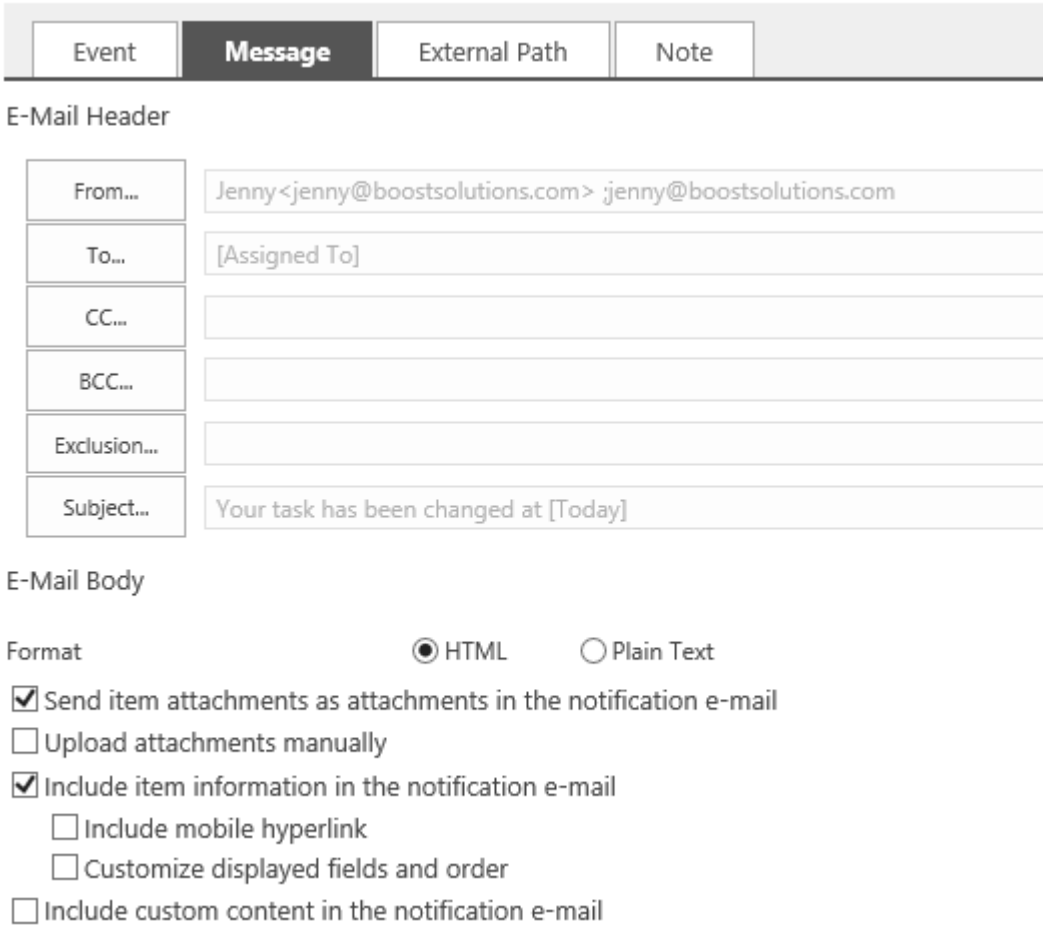
When to Send Alerts: Select **Send notification immediately**.



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



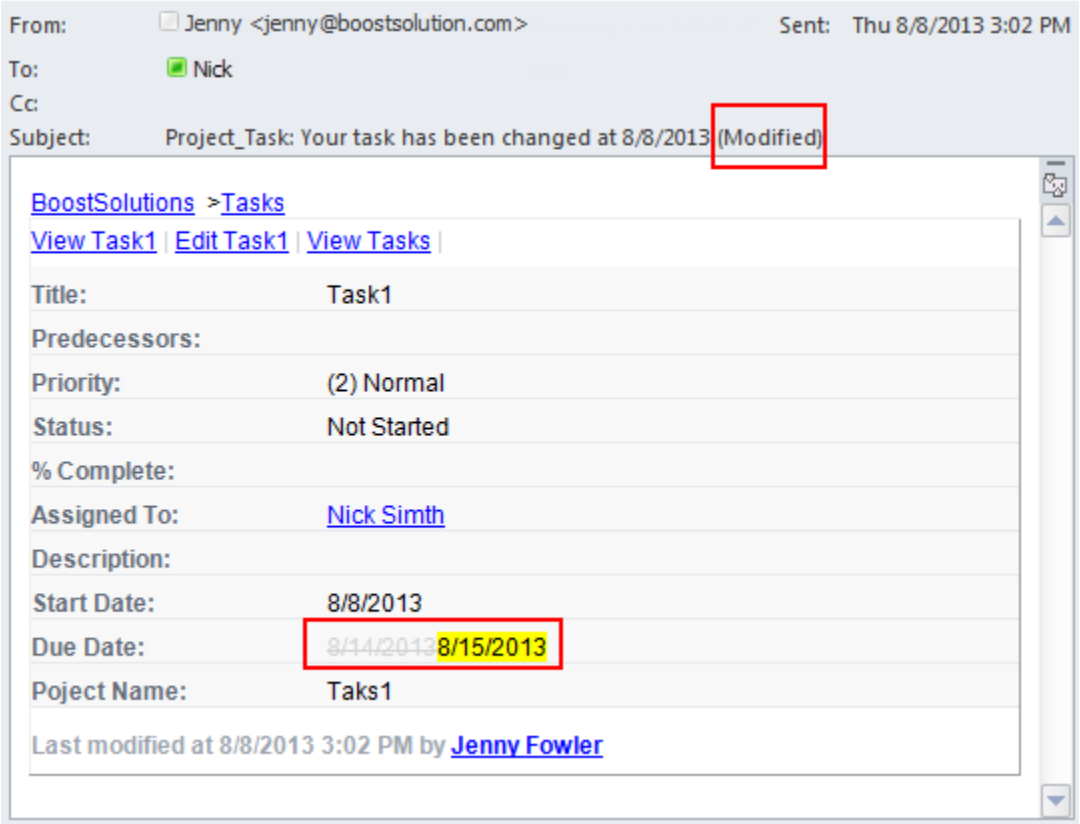
e. In the **Message** tab, specify the sender, recipient, CC and Bcc fields and the subject for the Alert e-mail.



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.

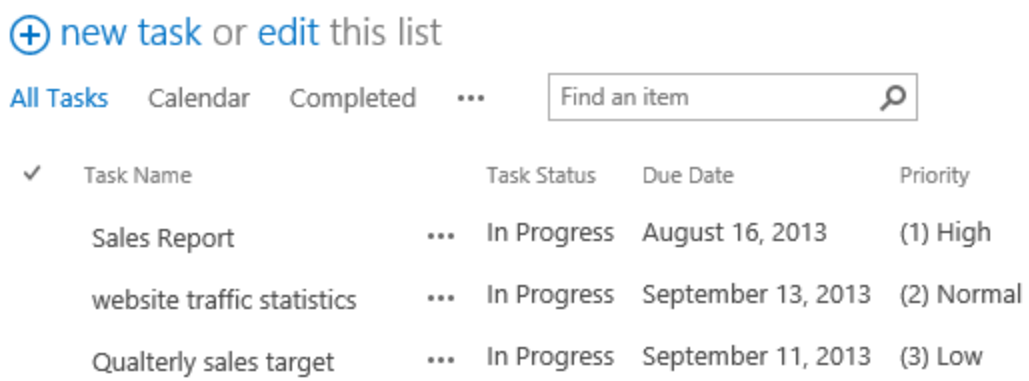
h. The following is the notification email your team member received. The changes are highlighted and the notification type is displayed in the subject line.



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:



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

a. Click on the **Alert Reminder Boost** button under the List tab on the ribbon.

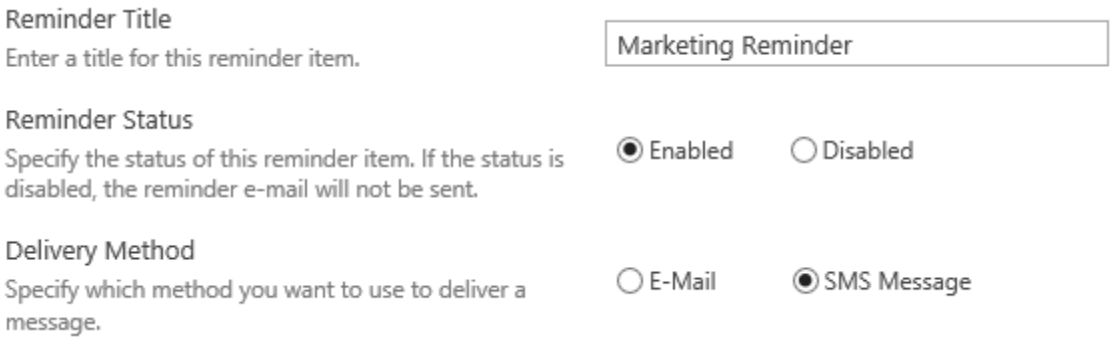
b. In the Alert Reminder Settings page, click the **Reminder** tab and then click **Add new alert item**.

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

Reminder Title: Enter a title for this reminder.

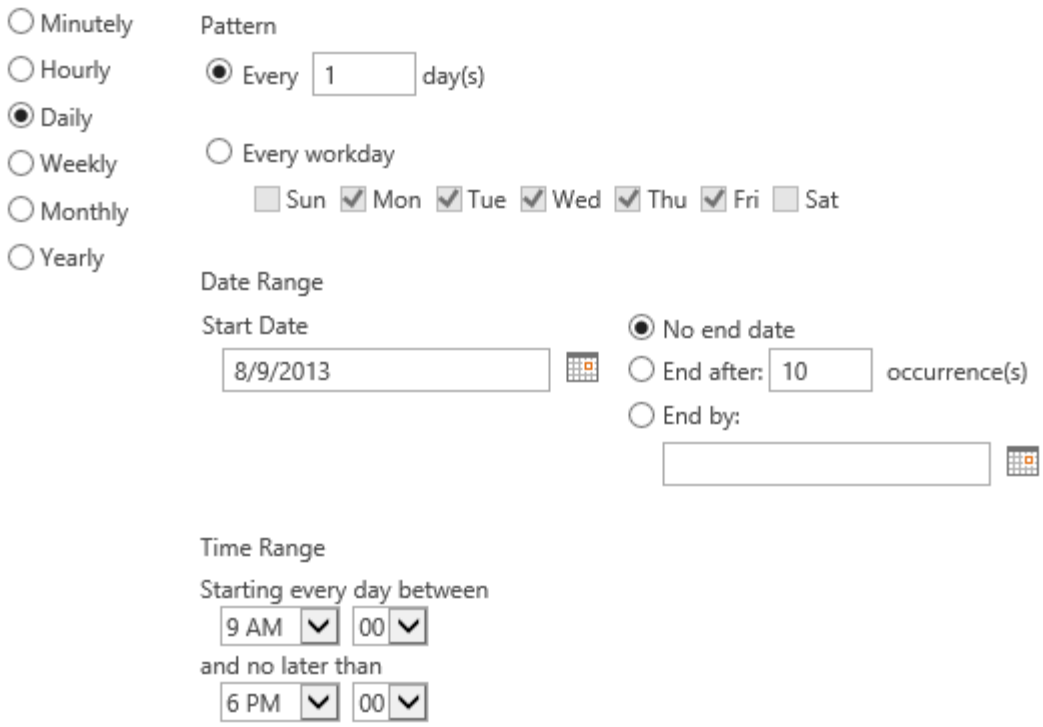
Reminder Status: Specify the status of this reminder.

Delivery Method: Select SMS Message.

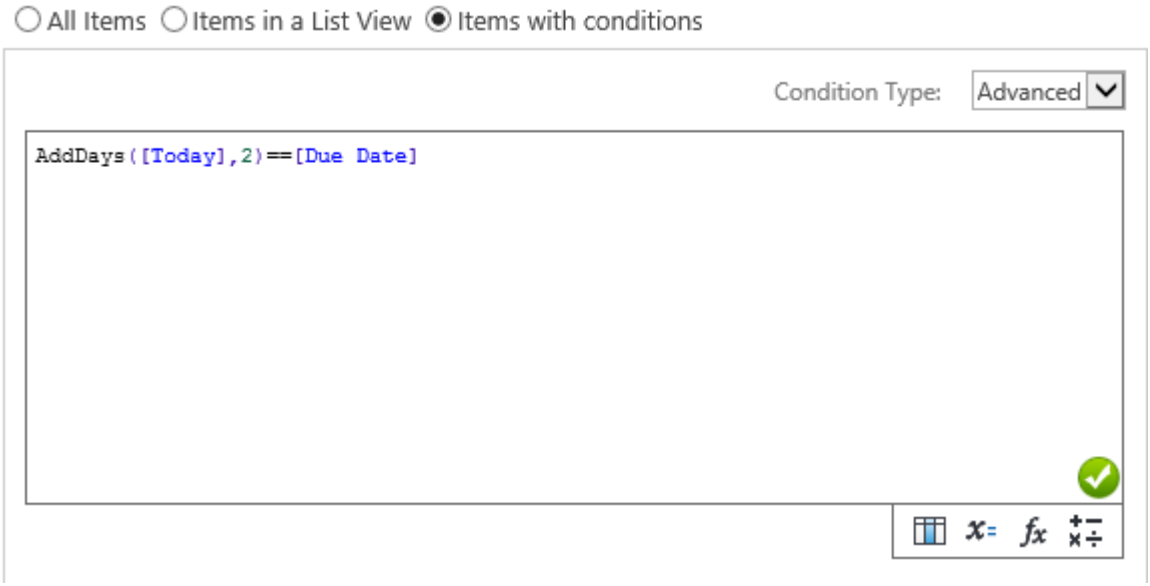


d. In the Schedule tab, you need to make the following configurations:

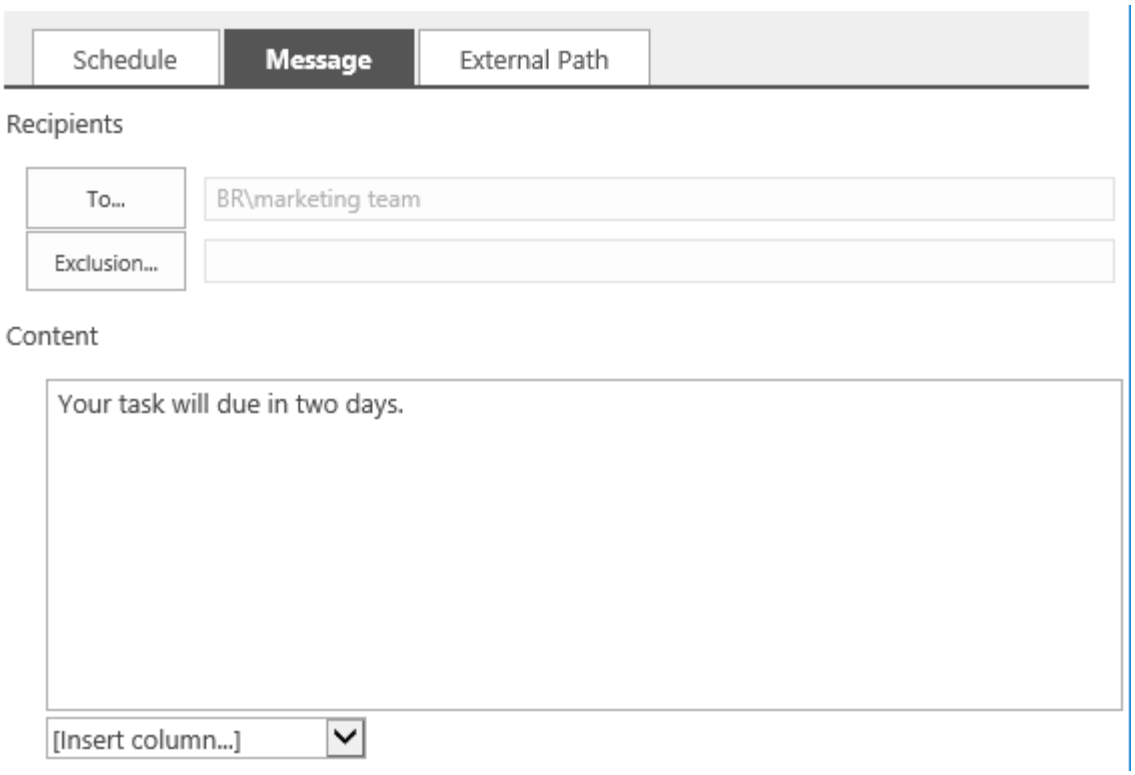
Recurrence: You will send a SMS Message to your team members between 9:00 AM and 10:00 AM every workday with no end date.



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).

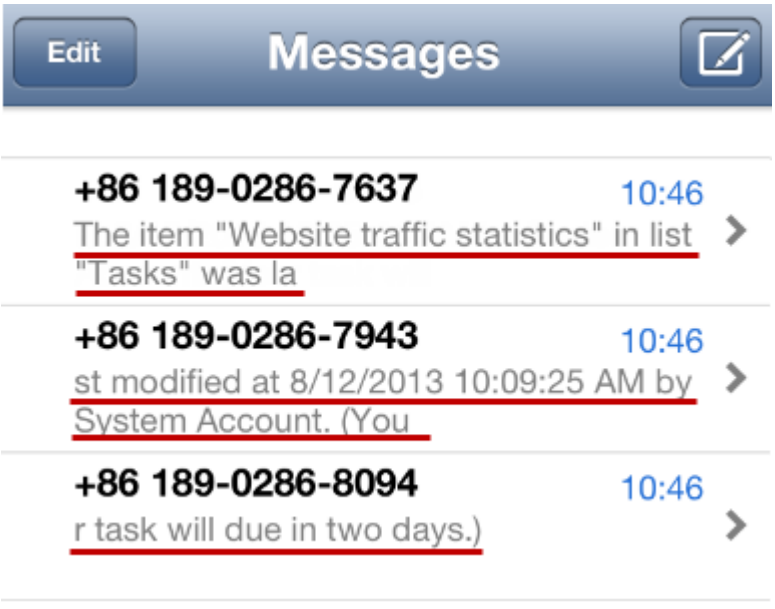


e. In the **Message** tab, specify the recipient and the content of the SMS Message.



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:



9. Troubleshooting & Support

Troubleshooting FAQ:

https://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

Appendix 1: License Management

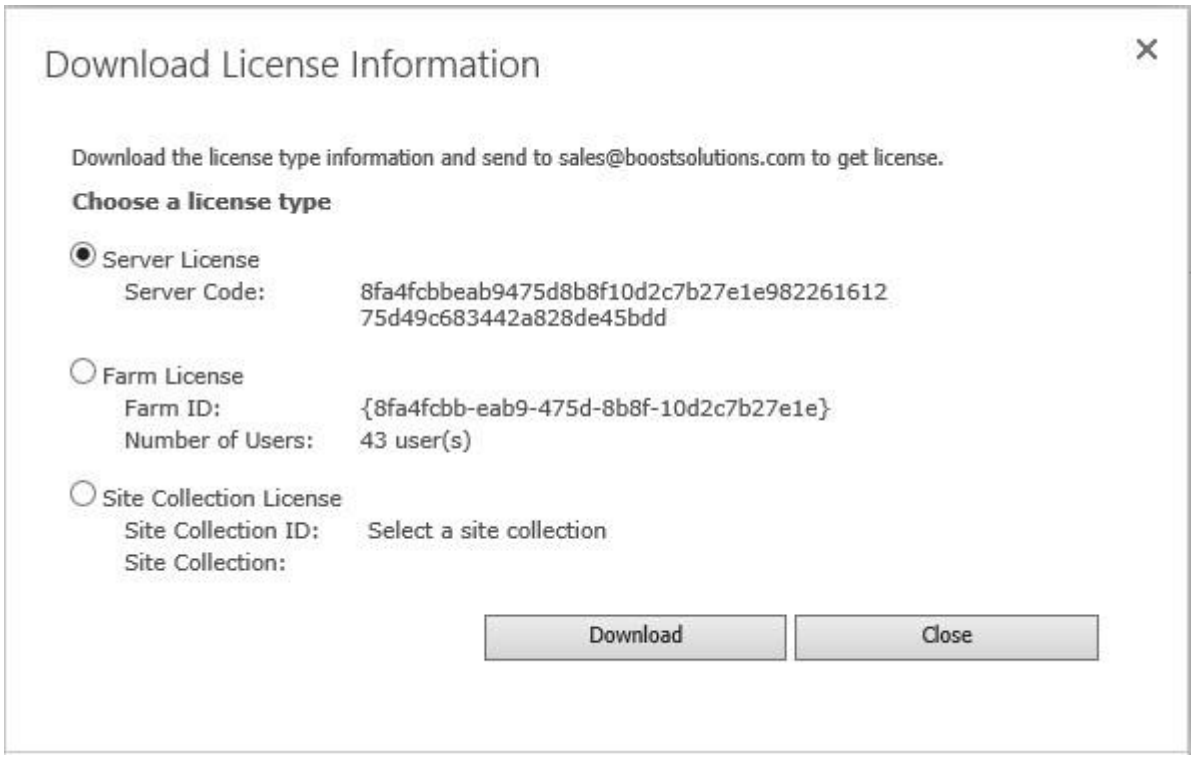
You can use Alert Reminder Boost without entering any license code for a period of 30 days from when you first use it.

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).

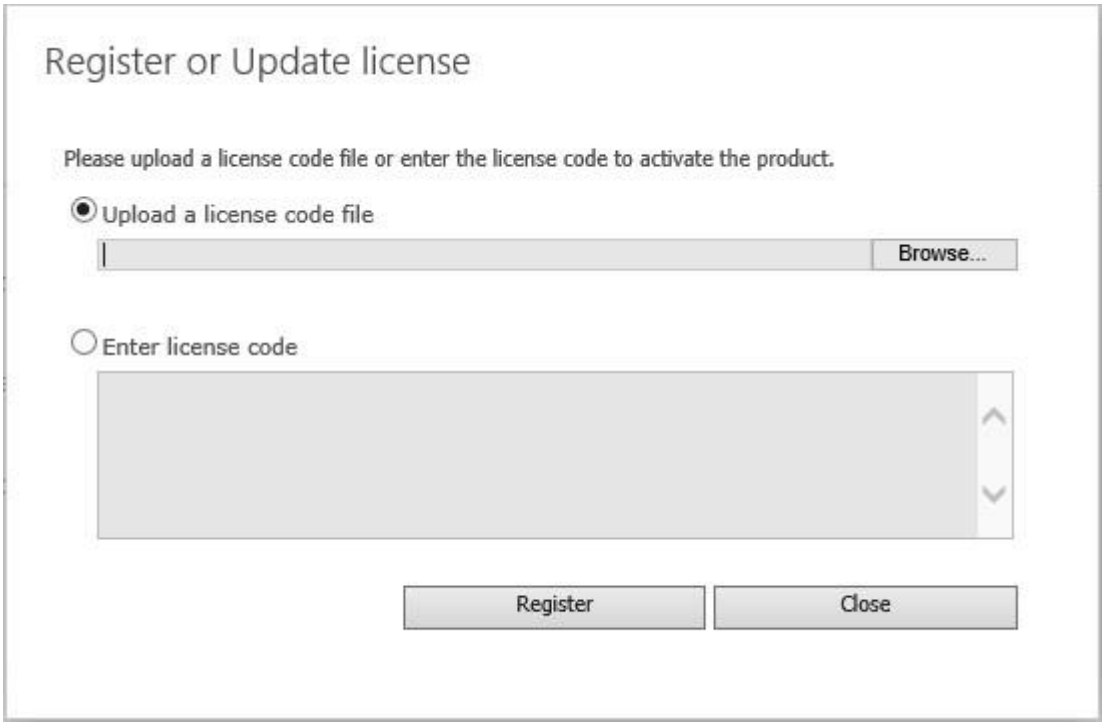


   In order for BoostSolutions to create a license for you, you MUST send us your SharePoint environment identifier (Note: different license types need different information). A server license needs a server code; a Farm license needs a farm ID; and a site collection license needs a site collection ID.

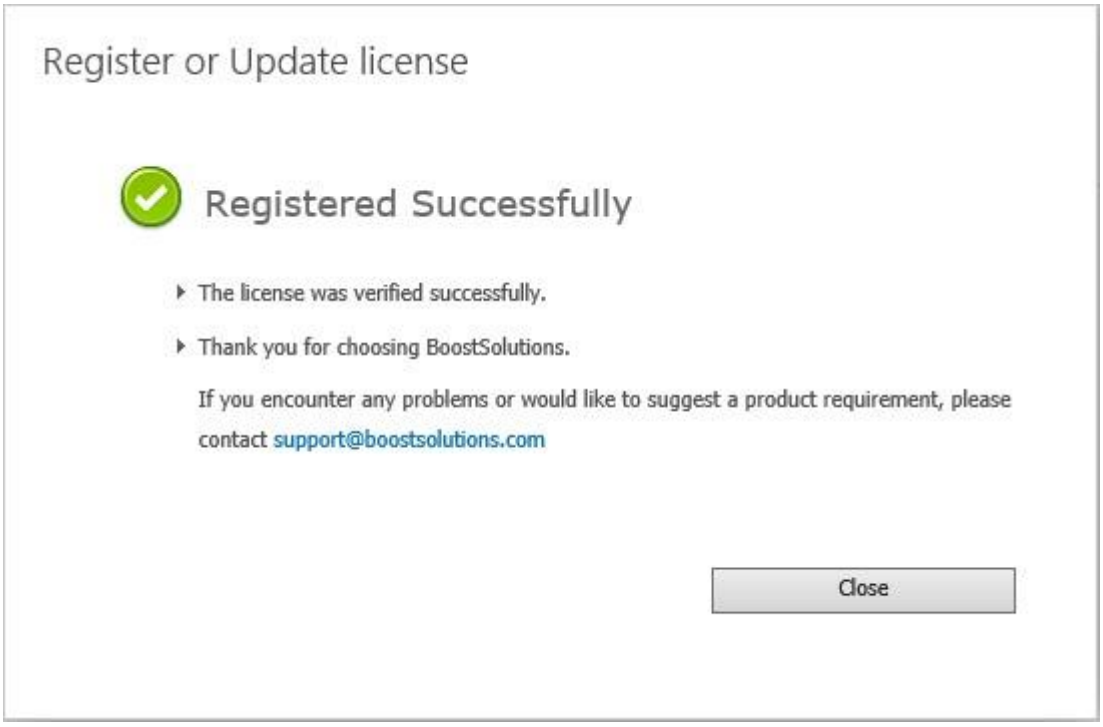
3. Send the above information to us (sales@boostsolutions.com) to generate a license code.

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.



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



For more details on license management, see the BoostSolutions Foundation.