

Astrea smartCal



Get an Email Reminder for upcoming Tasks & Events

User Manual Guide



www.astreait.com

A Product By:



OVERVIEW

At times when Sales persons are on the road, they may not get an Opportunity to Log in to their Salesforce Account every day. They may have important tasks or events due in their Salesforce accounts and they may not remember it, if they do not login to their Salesforce instance. This product has been designed to overcome this issue.

This product basically informs Sales users about upcoming important tasks or event by sending email reminders.



FEATURES

The Key features of the product are-

1. Salesforce administrator can schedule an Event or Task reminder. At the scheduled time a mail will be sent to the Salesforce User.
2. Scheduled Event or Task can be of email, call, meeting etc.
3. In Event scheduling Administrator can send reminder mail to the Attendee also.
4. In Task scheduling, the administrator has the option, whether he also wants to inform related contacts or not, by checking the appropriate checkbox.



CALENDAR TAB

There are two basic features of this tab:-

1. To create new tasks and events.
2. Current logged in user can view his/her tasks and events in a single view for any particular month or year.

The Green colour indicates Task and Red colour is for Event.

To create new Task

Click this  image on any particular date, month and year for which you want your task to be created.

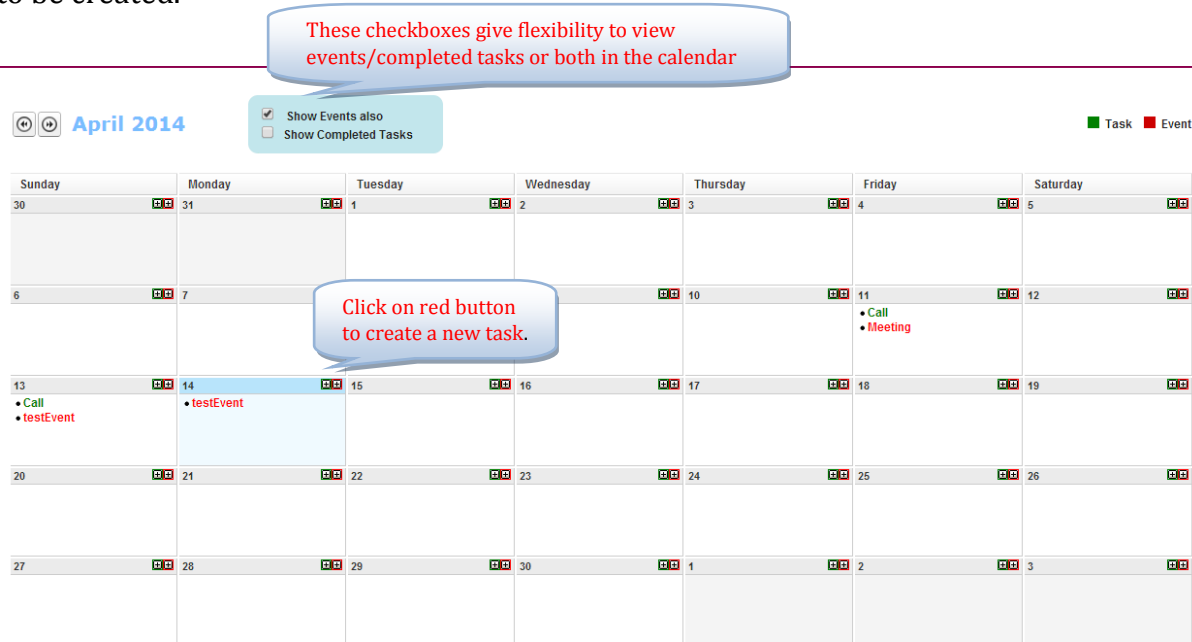


Fig 1.1

A new window will get opened for Task Creation. The 'page layout' for task activity should include two fields essentially i.e. 'send email reminder' which is required to send email of task.

Task New Task Help for this Page

Task Edit Save Save & New Task Save & New Event Cancel

Task Information ! = Required Information

Assigned To: 🔍 Status:

Subject: 🔍 Name: 🔍

Due Date: Related To: 🔍

Phone: Email:

Priority:

Send eMail Reminder: ☒

Description Information

Comments:

☐ Send Notification Email

Value for
'send email
reminder' is
required

Fig 1.2

Task Edit Save Save & New Task Save & New Event Cancel

Task Information ! = Required Information

Assigned To: 🔍 Status:

Subject: 🔍 Name: 🔍

Due Date: Related To: 🔍

Phone: Email:

Priority:

Description Information

Comments:

☐ Send Notification Email

Recurrence

☐ Create Recurring Series of Tasks

Reminder

Reminder: ☒

Chat

Date will automatically set as
we have clicked on 4th
December 2012

Fig 1.3: Creating a Task

The link gets created for task which will show Subject and Type(if selected) of Task in the Calendar view. Clicking on it will open a record in new tab.



Fig 1.4

To create new Event

Click this image . Similarly, as above we can view and create Event.



CONFIGURING THE EMAIL REMINDERS

How to Schedule a Task Reminder?

To Schedule a Task reminder the administrator needs to follow the following steps-

Step 1: Click on Task reminder Radio button, then a new section of the page will appear.

Step2: Provide details as per requirement for scheduling a task. **Send Reminder On** will specify when the mail will be sent that is on the Day of Meeting or the Day before Meeting depending on the Activity Date. Update **Send Reminder to Related Contact**, and choose the time of scheduling when you want to receive a mail. Click on **Submit**. Now, your Task reminder has been scheduled.

Create Task or Event Reminder Settings

▼ Current configuration for Task & Event Reminder

Task Reminder Values	
Send Reminder On	Day Of Meeting
Time for Task Scheduling	12:00 AM
Send Reminder to 'Related Contact'	☒

At 12:00 AM, the mail will be sent to the user and its related contact

Event Reminder Values	
Send Reminder On	Day Of Meeting
Time for Event Scheduling	12:00 AM
Send Reminder to 'Related Contact'	☒
Send Reminder to 'Related Attendees'	☐

Select this radio button to proceed the scheduling of task reminder batch

▼ Edit configuration for Task & Event Reminder

Edit the current selection of Task & Event Reminder.

☒ Task Reminder
 ☐ Event Reminder
 ☐ Both
 ☐ None

Select when you want to have the reminder mail

▼ Task Reminder

Send Reminder On	Day Of Meeting
Time for Task Scheduling	12:00 AM
Send Reminder to 'Related Contact'	☐

Check if you want to send the email to the related contact as

Submit

Click here to schedule a batch of tasks.

Fig 1.5: Scheduling a Task Reminder

How to schedule an Event Reminder?

The scheduling of event is similar to task reminder scheduling, but here you will have to choose Event Reminder radio Button.

In event Reminder scheduling, there is one additional feature that, an email can also be sent to the Related Attendees, by checking the 'Related Attendees' Checkbox. This will be applicable if you have added invitees at the time of creating the event.

Create Task or Event Reminder Settings

▼ Current configuration for Task & Event Reminder

Task Reminder Values	
Send Reminder On	Day Of Meeting
Time for Task Scheduling	12:00 AM
Send Reminder to 'Related Contact'	☒

At 12:00 AM, the mail will be sent to the user, related contact and its attendees

Event Reminder Values	
Send Reminder On	Day Of Meeting
Time for Event Scheduling	12:00 AM
Send Reminder to 'Related Contact'	☒
Send Reminder to 'Related Attendees'	☐

Select this radio button to proceed the scheduling of event reminder

▼ Edit configuration for Task & Event Reminder

Edit the current selection of Task & Event Reminder.

☐ Task Reminder
 ☒ Event Reminder
 ☐ Both
 ☐ None

Select when you want to have the reminder mail

▼ Event Reminder

Send Reminder On	Day Of Meeting
Time for Event Scheduling	12:00 AM
Send Reminder to 'Related Attendees'	☐
Send Reminder to 'Related Contact'	☐

Check if you want to send a reminder to related attendees

Submit

Click here to schedule a batch of events

Fig 1.6: Scheduling an Event Reminder

How to Schedule both Task and event reminder?

To schedule both Task and event reminders simultaneously, first choose **both** Radio button. Then a new section of the page will appear, fill the required information. Remaining steps are similar to Event reminder and task reminder scheduling.

After filling all required information click on the **Submit** Button. Don't forget to choose the 'Time for Task Scheduling' and 'Time for Event scheduling'; otherwise Task and event reminder will not be scheduled. Once you click on the **submit** button, Task and Event reminders are scheduled.

The screenshot displays the 'Create Task or Event Reminder Settings' form. It is divided into two main sections: 'Current configuration for Task & Event Reminder' and 'Edit configuration for Task & Event Reminder'.

Current configuration for Task & Event Reminder:

Task Reminder Values		Event Reminder Values	
Send Reminder On	Day Of Meeting	Send Reminder On	Day Of Meeting
Time for Task Scheduling	12:00 AM	Time for Event Scheduling	12:00 AM
Send Reminder to 'Related Contact'	☒	Send Reminder to 'Related Contact'	☒
		Send Reminder to 'Related Attendees'	

Edit configuration for Task & Event Reminder:

Edit the current selection of Task & Event Reminder.

☐ Task Reminder ☐ Event Reminder ☒ Both ☐ None

Task Reminder:

Send Reminder On: Day Of Meeting (dropdown)
Time for Task Scheduling: 12:00 AM (dropdown)
Send Reminder to 'Related Contact': ☐

Event Reminder:

Send Reminder On: Day Of Meeting (dropdown)
Time for Event Scheduling: 12:00 AM (dropdown)
Send Reminder to 'Related Attendees': ☐
Send Reminder to 'Related Contact': ☐

Submit

A blue callout bubble points to the 'Both' radio button with the text: "Select this radio button to proceed the scheduling of task and event reminder batch".

Fig 1.7: Scheduling both task and Event reminder

How to abort all scheduled Tasks and Event reminder?

To abort all scheduled Task and event Reminder Choose **None** radio button, then click on **Submit**. Once, you click on **Submit**, it will abort all Scheduled task and Event Reminder, and a message will be displayed, 'All scheduled jobs related to Task & Event reminder have been aborted'.

Create Task or Event Reminder Settings

▼ Current configuration for Task & Event Reminder

Task Reminder Values

Send Reminder On

Day Of Meeting

Time for Task Scheduling

12:00 AM

Send Reminder to 'Related Contact'

✓

Event Reminder Values

Send Reminder On

Day Of Meeting

Time for Event Scheduling

12:00 AM

Send Reminder to 'Related Contact'

✓

Send Reminder to 'Related Attendees'

☐

▼ Edit configuration for Task & Event Reminder

Edit the current selection of Task & Event Reminder.

☐ Task Reminder

☐ Event Reminder

☐ Both

☒ None

Submit

Click on this button to abort schedule batches for

All scheduled jobs related to Task & Event Reminder have been aborted

Create Task or Event Reminder Settings

▼ Current selection for Task & Event Reminder

There is no current record for Task and Event Reminder settings.

▼ Type of Activity to be Tracked

☐ Task Reminder

☐ Event Reminder

☐ Both

☐ None