



## Diary Email Alerts

The KEYPrime Diary Email alert module allows an Email reminder for upcoming diary actions to be sent to specified people. Reminders can be sent any number of days ahead of the due date, as well as at midnight on the day before the activity is due. The Email Alert system can only work well where KEYPrime Data is on a computer that remains switched on 24/7.

The Email alert module can be used on any level or version of KEYPrime Property, although alerts can only be sent to contractors where the Works Manager module is enabled.

### Configuring System Settings

**NOTE – a reasonable level of technical competence is required to configure this module initially.**

This is carried out from Diary Settings which is within the Admin Section of KEYPrime Property.

Log in to KEYPrime Property as an Administrator user and select the menu option Diary Settings on the Admin menu.

A configuration screen is shown as illustrated:  
DON'T PANIC it looks more complex than it is.

Take each section at a time to complete the process.

A screenshot of the 'Diary Settings' configuration window. The window is titled 'Diary Settings' and has a close button (X) in the top right corner. It is divided into several sections: 'Connection Details' with fields for 'Server\Instance' (PC81\LMKEYPRIMESERVER), 'Database Name' (Demo data), 'User Name' (LMKPAdminUser), and 'Password' (masked with dots), plus a 'Use Default Credentials' button; 'Diary Alerts Configuration' with a checked 'Enabled' checkbox; 'Email' section with 'Email Configuration' fields for 'Email Server' (smt.office365), 'Port' (587), 'User name' (your.networkusername), 'Password' (masked), and 'From Address' (office@estate.co.uk), plus a 'Test Email' button; 'Alert Types' with 'Days Before' set to 30 and a 'Send midnight alert' checkbox; and 'Alert Email Settings' with radio button options for 'Assignee', 'Contractor', 'Tenant', 'Landlord', and 'Created By' (all set to 'Off'), and 'Action Type' (radio buttons for 'To', 'CC', 'BCC'). At the bottom right are 'Save' and 'Exit' buttons.

First tick the **Enabled** option in the Diary Alerts Configuration section. This can be unticked at any stage to disable sending of any more alerts.

The rest of the configuration is as follows:

<b>Connection Details</b>	
<b>Server \ Instance</b>	The Server and Instance name of your Prime Data. This can be quickly checked in the Change Database option on Launchpad Administrator menu. Copy and paste the value if needed.
<b>Database Name</b>	This is the database that your Diary Alert system will monitor in order to identify when to send Email alerts.
<b>User Name</b>	In most cases simply press the Use Default Credentials and this will use the same information that has been provided by Landmark. If, however, you are the rare exception and you installed and maintain your own copy of Microsoft SQL Server, you will need your System Administrator's log in.
<b>Password</b>	A valid SQL Server password for the SQL Admin User name entered.
<b>Use Default Credentials</b>	To automatically enter the Landmark default SQL User and Password for a KEYPrime installed Instance of SQL Server.
<b>Email Configuration</b>	The details required in order to generate and send out emails from the Server machine automatically. Please consult your Email Administrator.
<b>Email Server</b>	The Simple Mail Transfer Protocol (smtp) type Email server that sends out emails for your organisation, usually Outlook or Exchange.
<b>Port</b>	Usually 587 unless specifically blocked by you Network or Email Administrator, in which case you will need to consult them. This is a port that allows you to connect to the Email server.
<b>User Name</b>	A valid user name authorised to send out emails for the organisation, i.e. your user name.
<b>Password</b>	The valid password for the User name entered on the left.
<b>From Address</b>	The Address from which you wish to show the recipients that the emails have been sent, this must be a valid email address in your Organisation.
<b>Alert Types</b>	Default settings for when to send alerts.
<b>Days before</b>	How many days before the due date and time of an action you wish to send out alerts, as a default.

<b>Send midnight alert</b>	Whether to send out alerts for actions due the following day.
<b>Alert Email Settings</b>	A configuration screen of who to send Alerts to and where to include their email address. Options are Off - Send no alerts to this person. To - Include the recipient in the To field of the email, all other recipients will see their email address. CC - Include the recipient in the CC field of the email, all other recipients will see their email address. BCC- Include the recipient in the BCC field of the email, other recipients will not see this email address.
<b>Assignee</b>	The KEY Prime property user or assignee that the task is Assigned to.
<b>Contractor</b>	For Works Manager tasks, any Contractor that has an email address and is linked to the task types which are flagged to receive alerts.
<b>Tenant</b>	Any tenant that has an email address and is linked to diary action codes which are flagged to receive alerts.
<b>Landlord</b>	A Landlord with an email address can be included in the recipients of email alerts where appropriate.
<b>Created By</b>	The KEYPrime Property user that created the diary action.
<b>Action Type</b>	Each Action and Task code can have an email address of the person that wants to receive email reminders; this may be the manager or an agent or some other person that is not covered by any of the other options here. There is no Off option on this section as this is determined for each action code by leaving the email field empty.

## Notes

Settings can be reviewed and changed at any point. Accessing them through the same Admin menu. Changes that are made which would mean that an Alert should have gone out the previous midnight will not be sent immediately. Although midnight alerts that have been missed can be forced by restarting the Support Service (see later).

Once an Email Alert has been sent for an Action or Task as a Midnight Alert or a regular X Days Before alert, these alerts cannot be resent, i.e. if the Days Before was set to 60 days and then changed to 30 days, no additional alert will be sent 30 days after the first one.

## Individual Settings

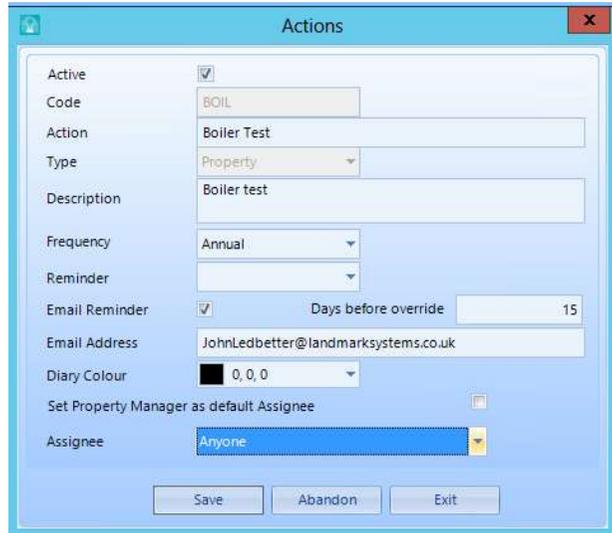
Each Diary Action Type and Works Manager Task Type requiring email prompts has their own Email Alert Setting, e.g. a boiler service action could be sent to the boiler service company, whilst a rent review action is sent to the managing agent.

## Diary Actions

For each diary action type code that you wish to send out an Alert for tick the Email Reminder option.

This will then send alerts to all records that are linked to the diary action, as determined by the global settings in configuration as shown above.

Each action type has an option to override the default notice period set in configuration. If you leave the Days before override as 0 it will use the system default.



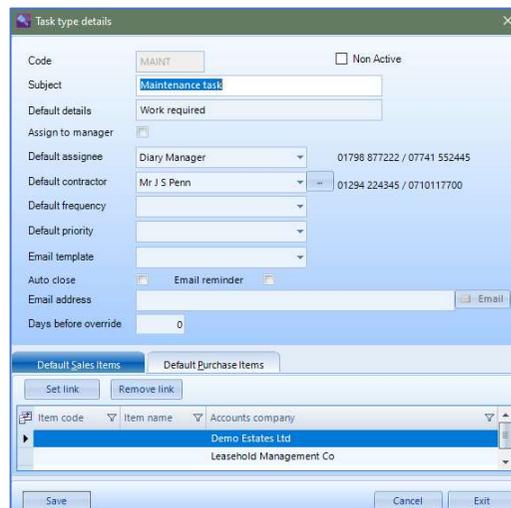
Each Action type can have its own specified recipient(s), the email address field can hold multiple email addresses, separated with the ; character, up to 100 characters in total. All recipient addresses will be entered in the same To, CC or BCC fields for the action. These recipients may be a manager, an outside professional or whoever else you wish to be reminded of the specific type of upcoming diary action.

## Using Diary Alerts with Works Manager Module

As with diary action types, the Works Manager Tasks have a tick box to indicate whether to send out alerts.

There is also the field to enter the recipient email addresses for those responsible for monitoring the tasks; where more than one person is required several email addresses can be entered separated by a ;

Like Actions the system default notice can be overruled by changing the days before override from 0 to the required number of days' notice needed.

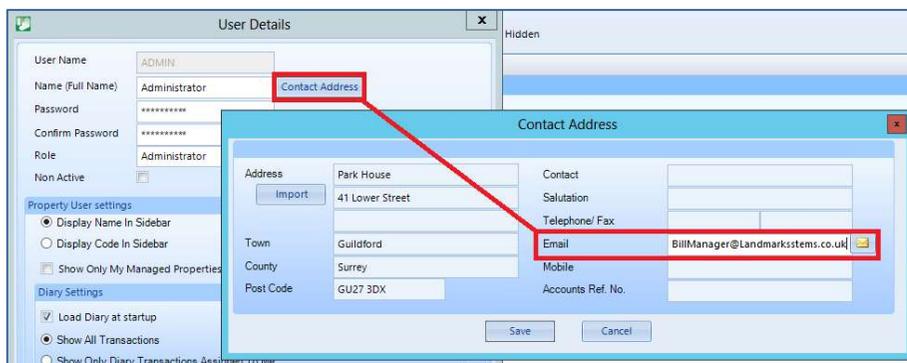


**Remember only one Alert of each type can be sent for each Action or Task record; if an Alert has already been sent, reducing the notice period will not result in a new Alert being produced.**

Having configured the settings make sure that other recipient records have an appropriate email address set in the main email address field. Potential recipients include the Assignee, Tenant, User that created the action, the Landlord and, in the case of Works Manager, the Contractor records.

### Email Addresses

Users and Assignee email addresses are entered under the Contact Address button on the User record.



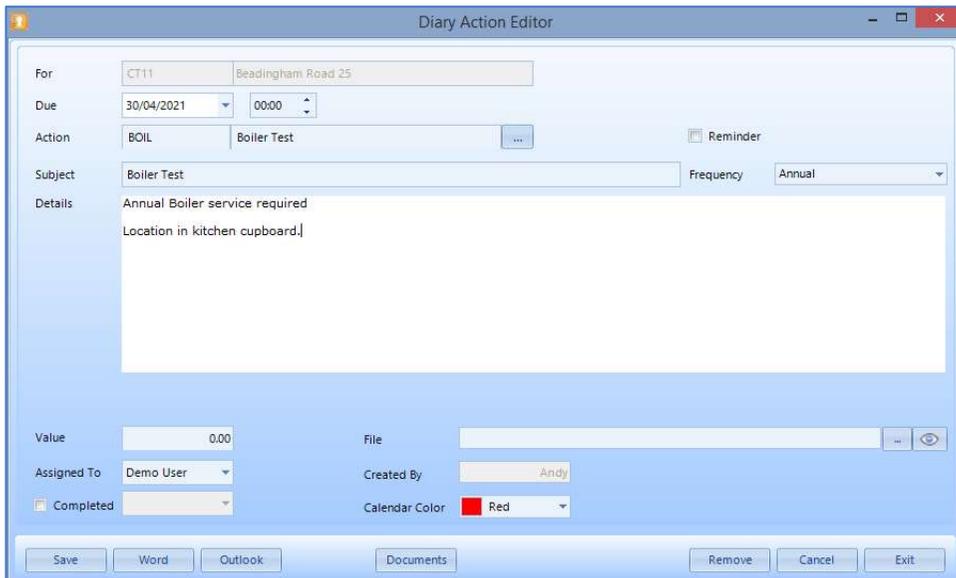
Landlords, Tenants and Contractors email address should be entered in the Email field on their record, the CC Email addresses (Email2) will be ignored.

### For Works Manager

Contractors email details are entered in the Email field on the contractor's record under the Works Manager, Contractors menu. Again the Email2 option will be ignored but multiple email addresses, up to one hundred characters in total, can be recorded in the Email field when separated by a ;

### Email Information

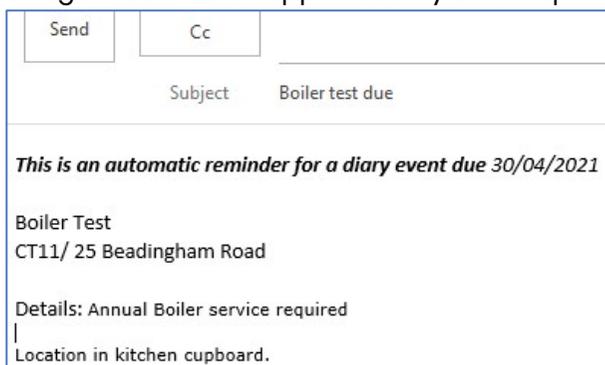
The email alerts generated will use information from the Action (or Task in the case of Works Manager) so that the action displayed will generate the email shown below.



The Subject from the Action/Task is shown in the email subject.

The Due date, Action type name, Code and Name of linked record and the details go into the body of the email as shown. (The format of the email received can depend on whether additional carriage returns are suppressed by the recipient.)

The code and name shown in the Email body will be the first of any Tenancy/Property/Tenant or Landlord code associated with the Action/Task. The alerts emails will be from the email address entered during configuration.



This can be used to help organise and apply rules for alerts at the recipients end.

**Note:** The purpose of the Alert is to act as a reminder in addition to and not to replace the use of KEYPrime Property Diary. The Diary is where the records should be maintained and updated.

## Troubleshooting

### Forcing missed Alerts to be sent

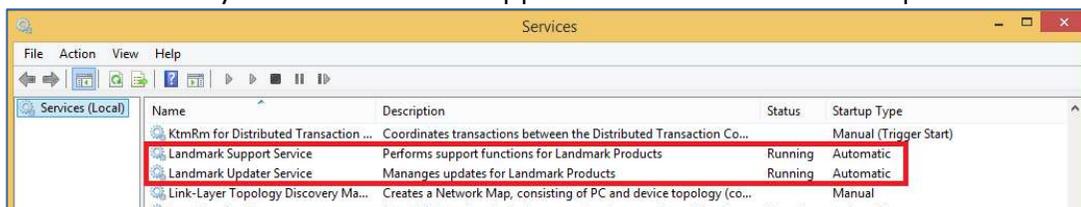
Alerts for actions due in the current day cannot be resent.

However midnight alerts that were missed will be sent if the Landmark Support Service is restarted.

Only the computer administrator can restart the Landmark Support Service.

Press the Windows key (between Ctrl and Alt on standard Microsoft Keyboards) then type in SERVICES.MSC you may be prompted for a Windows Administrator user name and password at this point. Once you have entered the appropriate security details you will see a list of Services that are currently running on the machine, these are usually listed alphabetically.

Scroll down until you find Landmark Support Service and Landmark Updater Service.



These should be running and set to Automatic Start or occasionally Delayed Start. Right click on Landmark Support Service and choose the Restart option, this will trigger the immediate sending of any Midnight Alerts that had not been previously sent.

Before closing the screen make sure that both Landmark Support and Updater Services are running and set to Automatic or Delayed Start.

### **Configure settings on a Server without KEYPrime Launchpad installed**

First ensure that Landmark Services are installed on the Server (these will be required for Automated updates).

Then search for the Diary Alert Settings program in the start menu or run the following command `C:\Program Files (x86)\Landmark\KeyPrime\CommonService\Key_CommonService.Application.exe" /Diary`.

You will still need to enable the module for the property company as described earlier.