



# Feature Guide: Event Reminders

For Community Software Version 4.4+/5.x+

Revision 2.0

May 4, 2022

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## About this Document

This document outlines the steps to build and configure an event reminder, including global parameters and options.

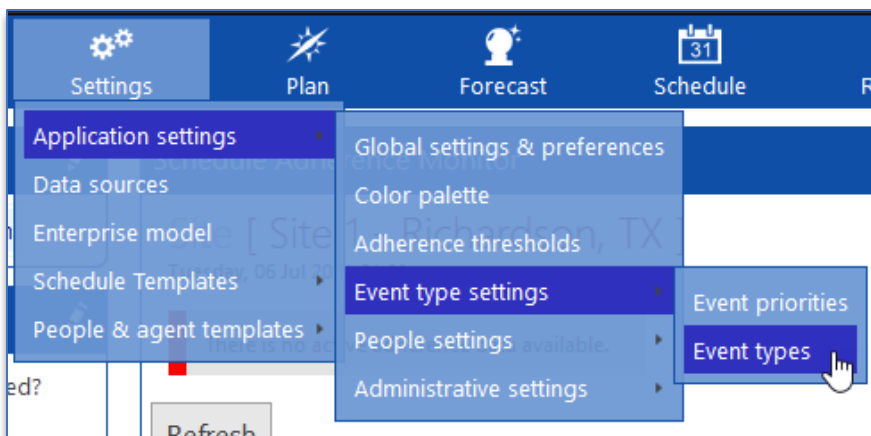
## What are Event Reminders?

Event reminders are pop-up browser windows that remind an agent when it is time for an event to occur. You may associate reminders with any event type that you have configured. The most common use for an event reminder is reminding agents to go to on a break or to lunch.

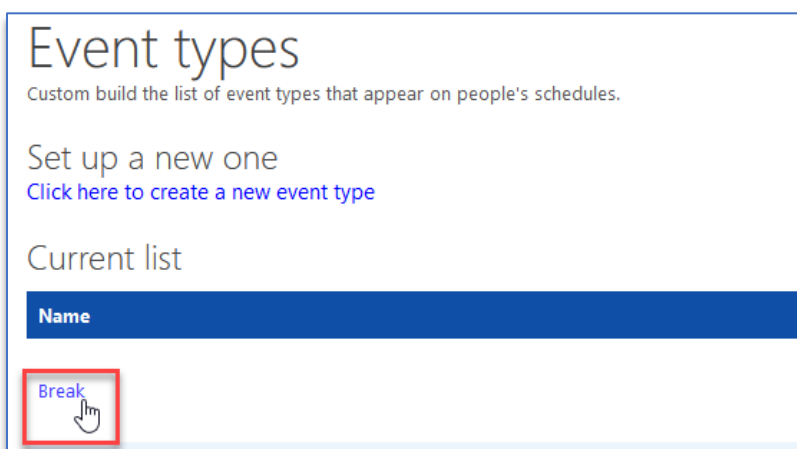
## How to Configure an Event Reminder

Event reminders are set up as part of an event type.

Navigate to Settings > Application settings > Event type settings > Event types.

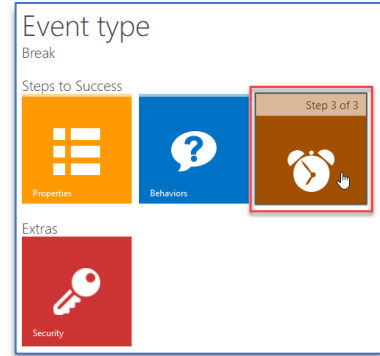
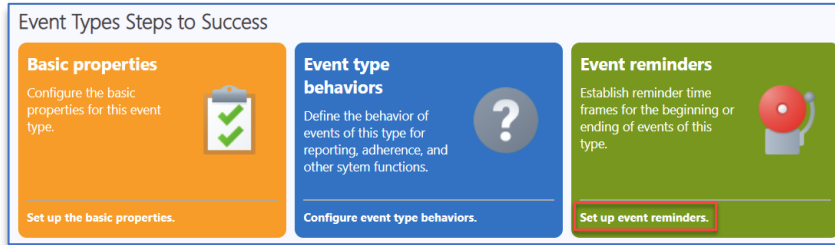


Select the event that you wish to configure from the list of all event types. In this example, we are applying a reminder to *Break*.



In 4.4: Select Step 3 of the wizard: Reminders.

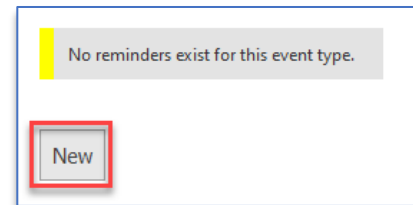
In 5.0: Select *Set up event reminders* in the Event Reminders tile.



## Event Reminder Configuration

Click *New* to add an event reminder.

In the pop-up window, configure the basics of your reminder.

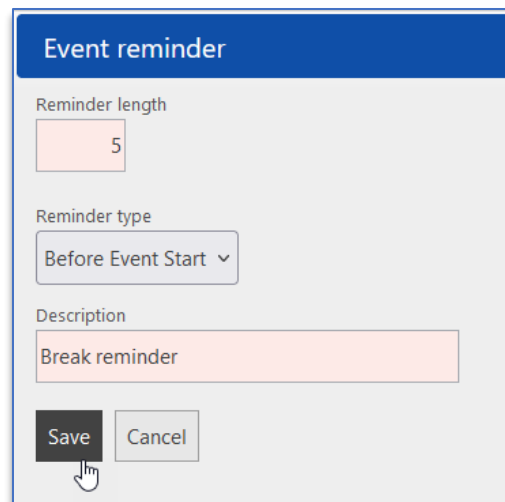


**Reminder Length** – Define the number of minutes away from the event to display the reminder.

- Minimum allowable time is 1 minute
- Maximum allowable time is 90 minutes

**Reminder Type** – Select whether to display the event reminder—

- **Before event start time**  
Remind an agent of a break 5 minutes before the start time.
- **Before event end time**  
Remind an agent 10 minutes before the end of their shift.





**Description** (required) –The description is for the WFM Administrator and will not be displayed in the agent pop-up. Only those with access to the event reminder configuration screen will see the descriptions.

## Editing and Deleting Event Reminders

Select the pencil *edit* icon (4.4) or button (5.0) to change the properties of the reminder.

Select the red X *delete* icon (4.4) or button (5.0) to remove the reminder.

Version 4.4

Reminder length	Type	Description	
5	Before Event Start	Break reminder	 

Version 5.0

Reminder length	Type	Description	
5	Before Event Start	Break reminder	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

## Other Considerations

You may configure multiple reminders for a single event. For example, you may create a 7-minute reminder followed by a 1-minute reminder for a break.

**Changes made to reminders will only affect *future events*.** Reminders are inserted into the reminder feed when newly published events are added to a schedule or when an existing published event is modified. Agents will not receive reminders for events in their existing published schedules unless you modify the affected events, after you create the reminder.

Adding a new reminder, and then walking to an agent's desk to see it in action will not work unless you modify the scheduled event after you add the reminder.

## Event Reminders Display

### Reminder Pop-Up

Agents will see a pop-up window depending on their browser settings.

The display includes:

- Event Type
- Event Description (not the reminder description)
- Location
- Event Start Time
- Event End Time
- Notification Details – Starts in and number of minutes

Current event reminders & notifications 06 Jul 2021 02:11:48 PM

Event type	Description	Location	Start time	End time			
■	Lunch	Off phone interval	02:15:00 PM	02:45:00 PM	Starts In	0:04 Minutes	<input type="button" value="Delete"/>

---

■ No current notifications.


### Snooze

If the agent clicks the *Snooze* button, the reminder will re-appear one minute later by default. You may customize this interval in the Application settings > Global settings & preferences.

## Auto Refresh

If the event reminder tab / window is left open, the reminder will auto refresh the *Starts In* value every 60 seconds to count down to the event.

Once it is past the scheduled start time, the event reminder will display that the event is *Past Due*.

Current event reminders & notifications					06 Jul 2021 02:16:18 PM	
Event type	Description	Location	Start time	End time		
 Lunch	Off phone interval		02:15:00 PM	02:45:00 PM	Starts In	Past Due <input type="button" value="Delete"/>

## Closing an Event Reminder

Event reminder tabs / windows that are closed will re-appear at the next 60-second cycle of reminder updates. Event reminders automatically delete after 90 minutes (or selected interval).

## Workstation Requirements

To receive pop-up reminders, an agent's desktop must meet several requirements. Every customer has a different desktop environment so no single set of rules will apply to every situation. The following may be used as guidelines.

### Community must be open

Community is 100% browser-based with nothing installed on the desktop. Agents must have the Community application open in order to receive an event reminder. Community can be minimized, but it must be open in a browser window.

### Workstation must have correct time

Event reminders appear at the agent workstation based upon the date / time that is defined on the workstation. If the workstation has an incorrect date / time, the reminder will display at an incorrect date / time.

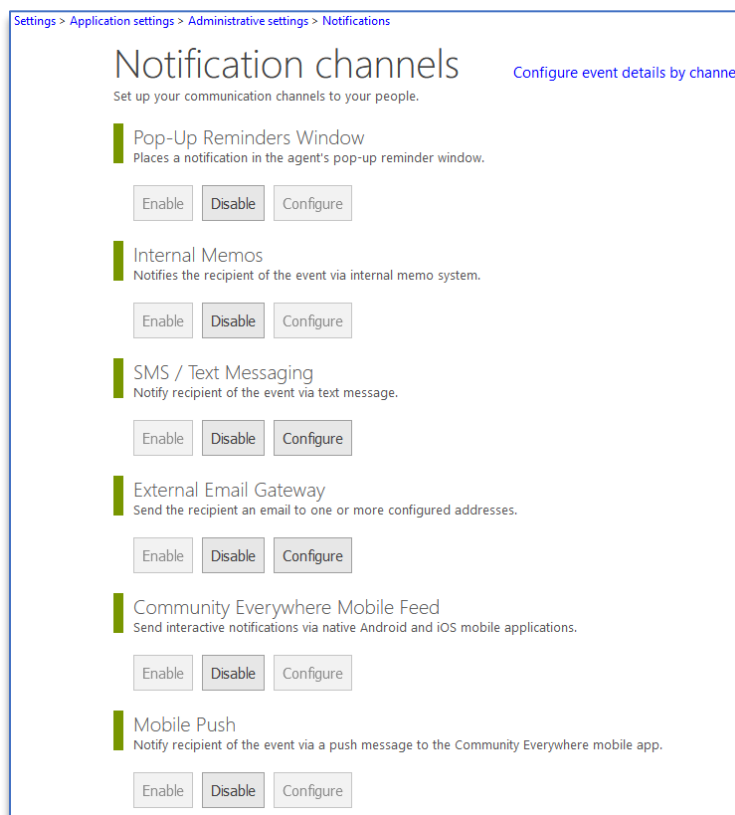
## Internet settings

If a user is actively working in another application that consumes the entire desktop, the pop-up may be hidden behind other application windows. The browser's internet options will dictate the reminder's performance, such as whether it will be in a new tab or window, and whether the user will be taken to the new reminder or it will be displayed in the background.

If you are displaying another tab when an event reminder is left open and the page refreshes, the reminder page will display in red to notify you of a new refreshed page.

## Additional Reminder Settings

Notifications are on by default. You can turn notifications off or on in Settings > Application settings > Administrative settings > Notifications.



You can customize the event settings in the global settings: Settings > Application settings > Global settings and preferences. Scroll to the bottom.

You can edit three reminder event settings:

### Event Reminders & popup notifications

Maximum role to see event reminder & popup window:

Event Reminder time interval:

Automatic event reminder delete interval:

**Maximum role to see event reminder and popup window.** Typically set to those who get schedules.

**Event reminder time interval:** Setting that determines the frequency of the display of reminders.

**Automatic event reminder delete interval:** Setting that defines when the database purges old reminders.