

How to Configure Reminder Emails in DBXL

5/26/2021

Overview

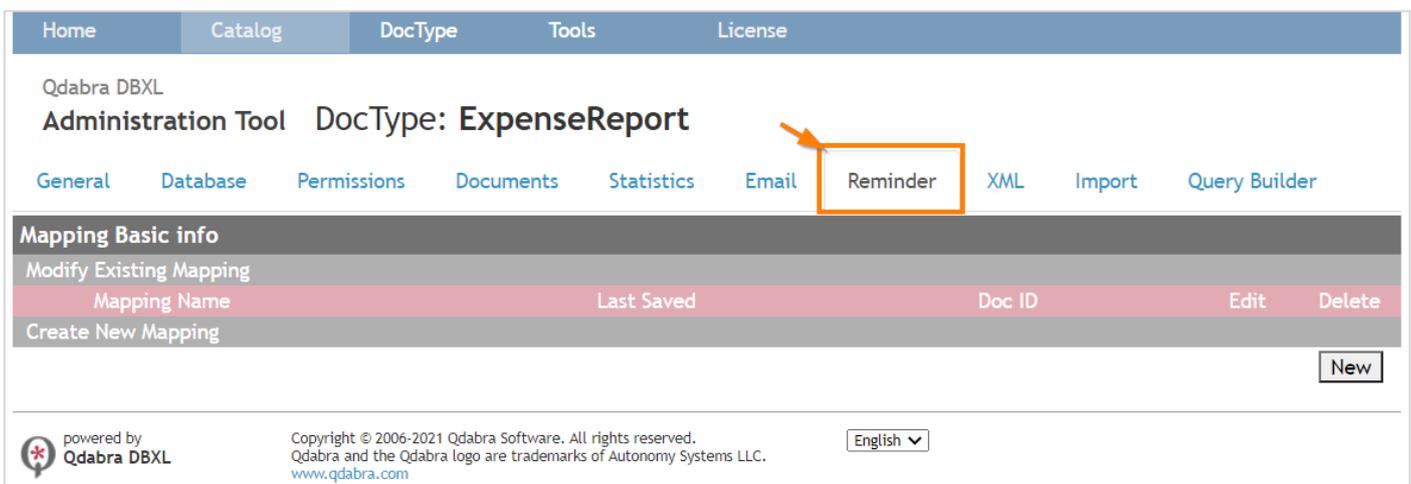
New for DBXL version 3.4, reminders allow you to re-send email mappings based on additional conditions or time frames. You can even use the new SendReminders feature to manually resend specific emails. This document describes how to configure these reminders using two types – Pre-set and On-demand.

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Adding Pre-set Reminders

Pre-set reminders can either run every x days or hours or be sent at specific date times from the XML data. This type of reminder is configured on the new Reminders tab in the DBXL Administration Tool.



To add a reminder, click New and enter a Reminder mapping name.

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Qdabra DBXL
Administration Tool DocType: **ExpenseReport**

General Database Permissions Documents Statistics Email Reminder XML Import Query Builder

Mapping Basic info

Modify Existing Mapping

Mapping Name	Last Saved	Doc ID	Edit	Delete
Create New Mapping				

New

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English

Qdabra DBXL
Administration Tool DocType: **ExpenseReport**

General Database Permissions Documents Statistics Email Reminder XML Import Query Builder

Mapping Basic info Save Back to Select Mapping

Reminder Name: Email Mapping: View: Email Mapping Condition: Active

Manager Reminder [Dropdown]

Each reminder mapping must be associated with an email mapping. If the email mapping has any conditions, the reminder mapping will use the same conditions.

For example, here’s an email mapping with a condition to send email only when Form Status is “Submitted”:

Qdabra DBXL
Administration Tool DocType: **ExpenseReport**

General Database Permissions Documents Statistics **Email** Reminder XML Import Query Builder

Mapping Basic info Save Save As Back to Select Mapping

Mapping Source DocType:	Type:	View:	Mapping Name:
ExpenseReport	PDF	PDF	Manager Notifications

Rendering Process

Rendering is initiated when: Action to take on the rendered PDF:

When a new document is submitted Save as QdFile and send Email with link

When an existing document is modified Send Email with Attachment

PDF Naming (XPath):

Additional Condition (XPath):

/my:ExpenseReport/my:Form/my:Status = "Submitted" ←

By design, the reminders associated with this email mapping will also not be sent unless the Form Status is “Submitted”. Thus, the “Email Mapping Conditions” field is automatically populated in the Reminders tab after you’ve selected an Email Mapping with conditions present in them:

Qdabra DBXL
Administration Tool DocType: ExpenseReport

General Database Permissions Documents Statistics Email **Reminder** XML Import Query Builder

Mapping Basic info Save Back to Select Mapping

Reminder Name: Email Mapping: View: PDF Email Mapping Condition: Active

Reminders use the information in the associated email mapping to determine the reminder content and the other email information, such as To, Cc's and so forth.

General Database Permissions Documents Statistics Email **Reminder** XML Import Query Builder

Mapping Basic info Save Save As Back to Select Mapping

Mapping Source DocType: ExpenseReport Type: PDF View: PDF Mapping Name: Manager Notifications

Rendering Process

Rendering is initiated when: When a new document is submitted When an existing document is modified Action to take on the rendered PDF: Save as QdFile and send Email with link Send Email with Attachment

PDF Naming (XPath):

Additional Condition (XPath):

Archival location: XPath Expression

Rendering Contents

Email Subject: Body: Static Text XPath Expression View HTML Plain Text XPath Expression

Attachments:

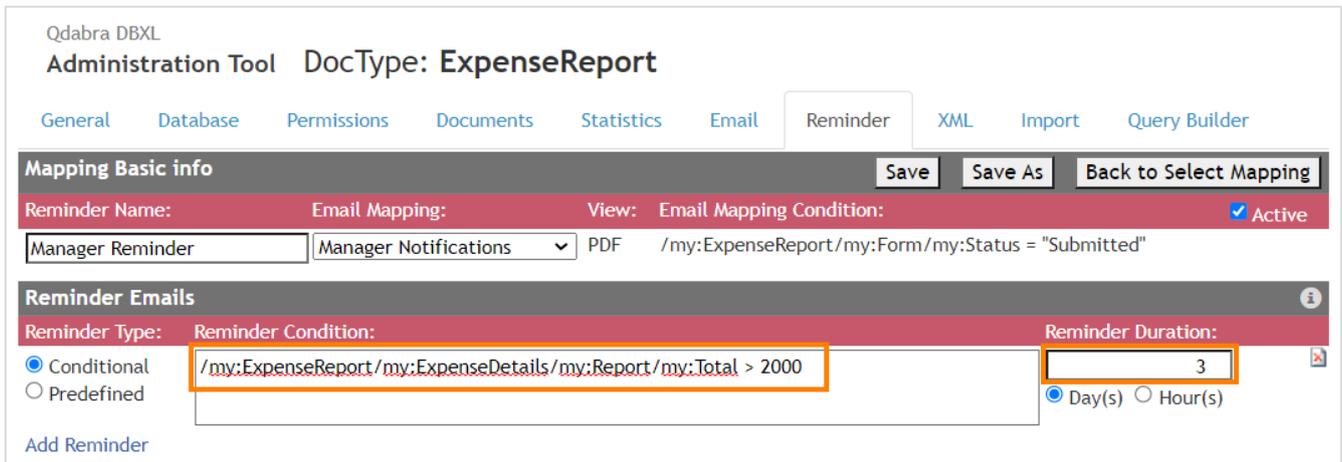
XPath of attachment: Email: Archive Location (optional): File Name (optional): [Add attachment](#)

Email Address

	Type:	Email Address: (XPath for Dynamic):	Display Name (Optional, XPath for Dynamic):
From Address	<input type="text" value="static"/>	<input type="text" value="Notifications@Qdabra.com"/>	<input type="text" value="Qdabra Notifications"/>
To Address	<input type="text" value="Dynamic (XPath)"/> <input type="text" value="Static"/>	<input type="text" value="/my:ExpenseReport/my:Resource/my:Manager, "/> Add To Email Address	<input type="text" value="/my:ExpenseReport/my:Resource/my:Manager/"/>
CC Address	<input type="text" value="Dynamic (XPath)"/> <input type="text" value="Static"/>	<input type="text"/> Add CC Email Address	<input type="text"/>

After selecting an Email Mapping for your Reminders, add a condition and duration (days or hours) to your Reminder Email if applicable, and click Save. Duration and data-based reminder settings are discussed further in the sections below.

These reminder conditions can be used to fine-tune reminders. Perhaps the reminder only needs to be sent if a specific assignee has been selected in the form, or a total dollar amount is over a certain limit. XPath's are not validated in the reminder conditions – double check your syntax prior to saving your reminder mapping.



Qdabra DBXL
Administration Tool DocType: ExpenseReport

General Database Permissions Documents Statistics Email Reminder XML Import Query Builder

Mapping Basic info Save Save As Back to Select Mapping

Reminder Name: Email Mapping: View: PDF Email Mapping Condition: Active

Reminder Emails i

Reminder Type: Conditional Predefined

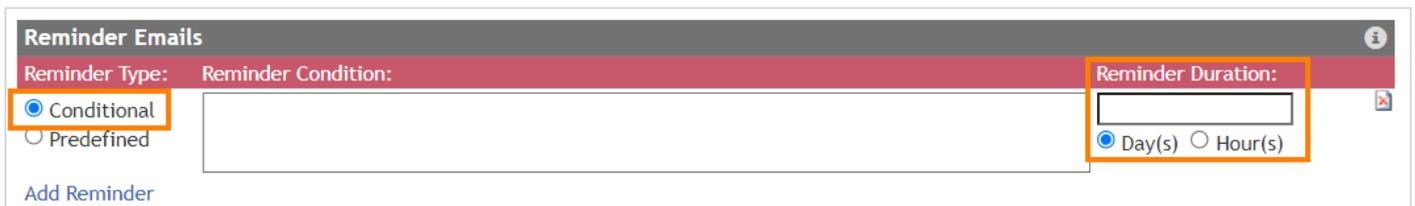
Reminder Condition:

Reminder Duration: Day(s) Hour(s)

[Add Reminder](#)

Duration Reminders

Duration Reminders are reminders that are sent at a specific duration, if any conditions in the reminder or the associated email mapping are met. For example, if the email mapping is set to send when the Form Status is "Submitted" and the reminder email is set to send the reminder every 3 days when Total Amount is greater than a certain amount, reminder emails will be sent for the email mapping every 3 days only until both conditions are met.



Reminder Emails i

Reminder Type: Conditional Predefined

Reminder Duration: Day(s) Hour(s)

[Add Reminder](#)

Data-based Reminders

Data-based Reminders are sent at a date & time specified in your form data. In the reminder mapping, select the Predefined option and provide the XPath to the field with the date & time when the reminder should be sent, along with an optional condition. If the field is blank or not a valid datetime in a submitted XML, or if the XPath is incorrect, no reminder will be sent.

Reminder Emails

Reminder Type: Conditional Predefined

Reminder Condition: [Empty field]

Reminder Duration: XPath to field with date/time for reminder

Add Reminder

Modifying Pre-set Reminders

Reminder Emails in a reminder mapping cannot be edited once saved. You'll notice this section becomes disabled after saving:

Qdabra DBXL
Administration Tool DocType: ExpenseReport

General Database Permissions Documents Statistics Email **Reminder** XML Import Query Builder

Mapping Basic info Save Save As Back to Select Mapping

Reminder Name: Manager Reminder Email Mapping: Manager Notifications View: PDF Email Mapping Condition: /my:ExpenseReport/my:Form/my:Status = "Submitted" Active

Reminder Emails

Reminder Type: Conditional Predefined

Reminder Condition: /my:ExpenseReport/my:ExpenseDetails/my:Report/my:Total > 2000

Reminder Duration: 3 Day(s)

Add Reminder

If the condition, duration, or XPath for a reminder needs to be changed, the reminder email must be deleted and re-added.

Reminder Emails

Reminder Type: Conditional Predefined

Reminder Condition: /my:ExpenseReport/my:ExpenseDetails/my:Report/my:Total > 2000

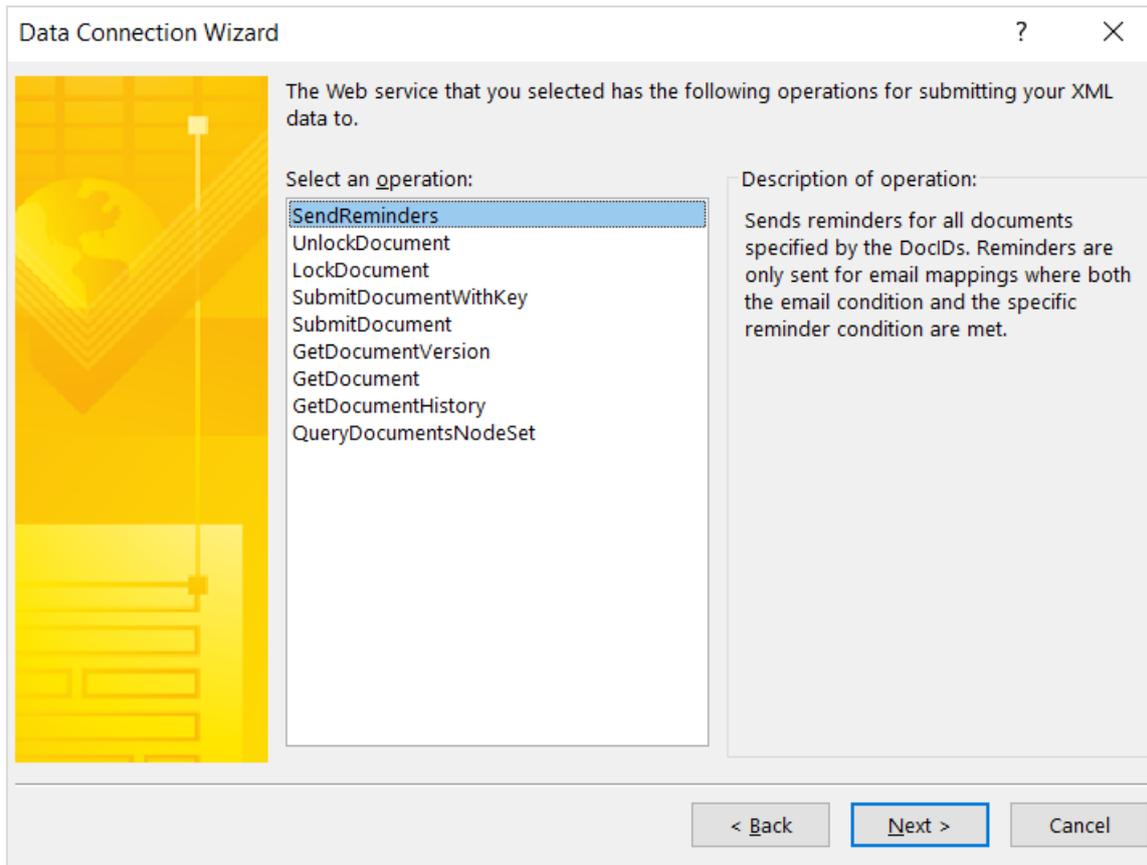
Reminder Duration: 3 Day(s)

Add Reminder

On-demand Reminders

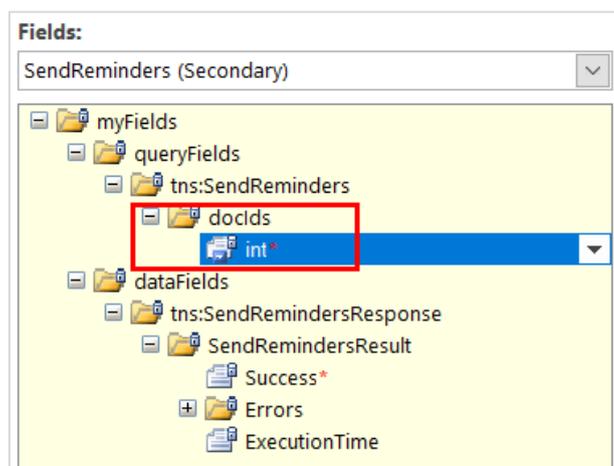
Reminders can be sent on-demand using the new SendReminders web service. Add a data connection to your form by following the steps below:

1. In InfoPath, go to Data → Data Connections.
2. Click Add → Submit data → To a Web service. Click Next.
3. Enter <http://<ServerName>/QdabraWebService/DbxlDocumentWithUserKeyService.aspx> or <http://<ServerName>/QdabraWebService/DbxlDocumentService.aspx> and click Next.
4. Select the SendReminders operation.



5. Leave the defaults and click Next.
6. Name your reminder data connection and click Finish.

This method from the DBXLDocumentService reprocesses any email mappings for a specified document id. So, the SendReminders docId field (/dfs:myFields/dfs:queryFields/tns:SendReminders/tns:docIds) must be set before running the SendReminders query:



Rules

Button: Send Reminders (Manual)

Set DocIds

Query

* New ▾

Details for:
Query

Condition:
None - Rule runs when button is clicked

Rule type:
Action

Run these actions: *
[Query using a data connection: SendReminders](#)

Don't run remaining rules if the condition of this rule is met

The method accepts an array of integers. qRules commands can be used to insert additional document ids. For example, you can use Insert to add additional rows:

```
Insert /dsname=SendReminders
/parent=/dfs:myFields/dfs:queryFields/tns:SendReminders/tns:docIds /child=tns:int
```

SetValue or CopyTable commands can be used to add the docId values and you can also set based on a condition. In the example below, the user checks which document to process the send reminders email. Only the selected docIds will be re-processed:

	Doc Id	Legal Name	Email Address	Status	Last Emailed
<input checked="" type="checkbox"/>	67704	██████████	██████████	Draw Received	05/21/2021, 7:38 AM
<input type="checkbox"/>	67686	██████████	██████████	Application Received	05/21/2021, 7:24 AM
<input checked="" type="checkbox"/>	67679	██████████	██████████	Application Received	05/21/2021, 12:38 AM
<input checked="" type="checkbox"/>	67674	██████████	██████████	Draw Received	05/21/2021, 12:23 AM
<input type="checkbox"/>	66705	██████████	██████████	Funded	05/10/2021, 8:04 AM
<input type="checkbox"/>	66697	██████████	██████████	Funded	05/10/2021, 8:03 AM

SEND REMINDERS (MANUAL)

AUTOMATIC REMINDERS

All email mappings for the doctype of the provided doc id will be re-evaluated and applicable emails will be resent. If there are no errors, the method will return Success = true. If there are any errors, that information will be returned in the error info.

Code	Description
19999	Document not found for doc id: 19990
	Successfully created reminders for 1 of 2 documents. 1 failed.

ADDITIONAL NOTES:

1. This method doesn't check this part of the email mapping because users may want to resend emails that are sent only when a document is created.

Rendering Process

Rendering is initiated when:

When a new document is submitted
 When an existing document is modified

2. This method checks for this condition in the email mapping:

Additional Condition (XPath):

```
/my:ExpenseReport/my:Form/my:Status = "Submitted"
```

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