



DYNAMICS RESOURCES
MICROSOFT DYNAMICS **GOLD** PARTNER

Birthday Notification Manual

1. Install solution (admin permissions are required) from <https://appsource.microsoft.com>
2. Open the solution from your list of solutions

Solution: Birthday notification

Information

Solution Birthday notification

Component Type: All

Managed Properties

Display Name	Name	Type	State	Customizable	Description
Birthday notification	Birthday notification	Process	Unmanaged	True	
Birthday notification (Child)	Birthday notification (Child)	Process	Unmanaged	True	
BirthdayNotification	BirthdayNotification	Plug-in Assembly	Unmanaged	True	
Contact	contact	Entity	Managed	True	Person with w
Contact Birthday	Contact Birthday	Email Template	Unmanaged	True	

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Solution contains:

- Birthday notification and Birthday notification (child) workflows
- BirthdayNotification plug-in
- Contact entity with one added field named 'Send notification about Birthday' (two options)
- Contact Birthday Email template
- Contact 'Birthday Do not delete' data

3. Go to Processes and double check that processes are activated

Solution: Birthday notification

Processes

Component Type: Process View: Customizable

New Add Existing Delete Remove Activate Deactivate Show Dependencies

Add Required Components Managed Properties More Actions

Process Name	Category	Primary Entity	Status
Birthday notification	Workflow	Contact	Activated
Birthday notification (Child)	Workflow	Contact	Activated

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4. Go to Email Templates and make changes for your business requirements

Solution: Birthday notification

Email Templates

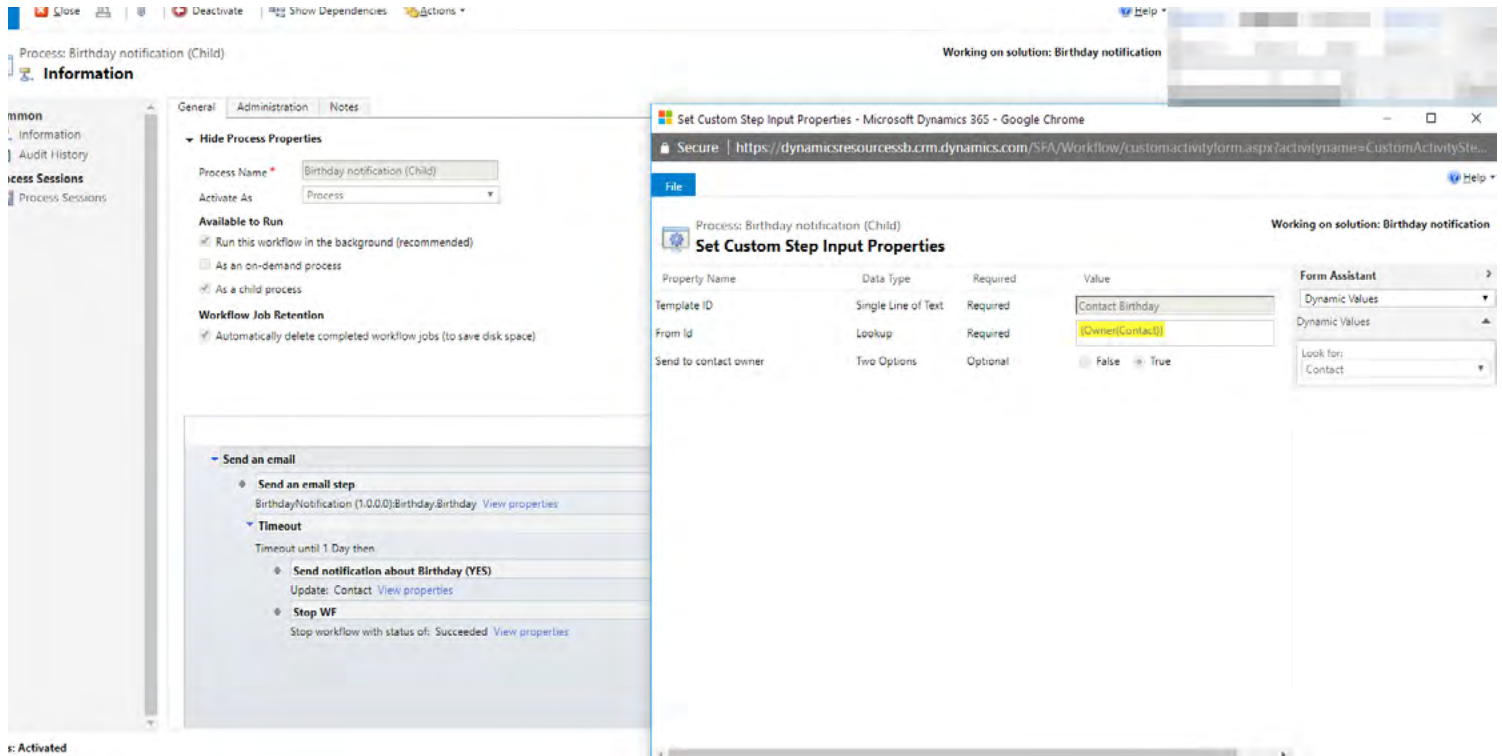
Component Type: Email Template View: Customizable

New Add Existing Delete Remove Show Dependencies Add Required Components Managed Properties

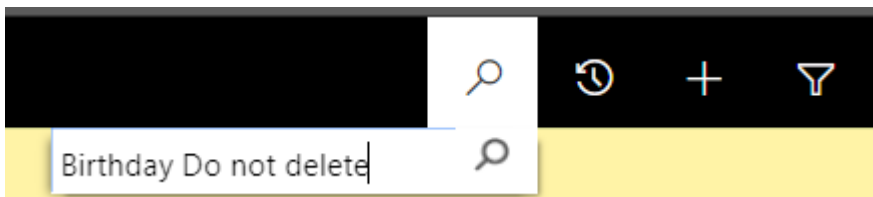
Display Name	Name	Type	State	Customizable	Description
Contact Birthday	Contact Birthday	Email Template	Unmanaged	True	

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5. If you want to change a logic go to the 'Birthday notification (Child)' process -> Deactivate -> Make changes in the 'BirthdayNotification (1.0.0.0):Birthday.Birthday' step:
 - a. Use already existing Email Template - Change 'Template ID'
 - b. From whom an email will be sent - Change 'From Id' (it can be a dynamic value)
 - c. Send an email directly to the Contact - Set 'Send to contact owner' to False (If True an email will be sent to Owner of the Contact)



6. Activate functionality. Search for the 'Birthday Do not delete' Contact in the Contact table (or use Global Search)



- Set 'Yes' in the 'Send notification about Birthday' field (Administrator should put this field on the form)

Send notification about

Yes

No

- Make sure that the WorkFlows were started

The screenshot shows the Dynamics 365 interface with the following components:

- Navigation bar: Dynamics 365, Sales, Contacts, Birthday Do not delete.
- Process Sessions section: Background Processes, Process Sessions.
- Table of Process Sessions:

System Job Type	System Job Name	Regarding	Status Reason	Owner	Started On
Workflow	Birthday notification (Child)	Birthday Do not delete	Waiting		11/20/2017 2:55 PM
Workflow	Birthday notification	Birthday Do not delete	Succeeded		11/20/2017 2:55 PM

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Active

Note: You can change all changeable parameters in the WorkFlows.