USER MANUAL

Smart Alerts

Version: 3.0

Compatibility:

Microsoft Dynamics 365 (Online and On-premise)

Browser Compatibility:

Edge (v12) and above
Firefox (v29) and above
Chrome (v33) and above
Safari (v7.1) and above
Opera (v20) and above

TABLE OF CONTENTS

Introduction

Smart Alerts for Dynamics CRM is a meticulously developed plugin that enables Dynamics CRM users to add and manage alerts for different entities in the CRM. Once Microsoft Dynamics CRM Smart Alerts is integrated, CRM users can add critical data/information to individual records. Thereafter, every time the connected CRM users access a particular record, they will receive an alert about the upcoming events, workflows, follow-ups and other actions that need immediate attention.

Using Smart Alerts for Dynamics CRM, you can manage bulk alerts, add multiple alerts for each record, set alert types, cascade alerts, set criteria-based alerts, get alert in email directly, manage user roles, add start and expiry date for each alert and do much more!

Smart Alert can smartly be configured and used in any language the CRM supports.

Benefits of Smart Alerts

- Address customer issues on time
- Reduce Response Cycles
- Streamline Business Processes
- Never miss on Follow-ups
- Enable users to take immediate action
- Boost productivity

Prerequisites

Following point must be followed before starting the Plugin installation:

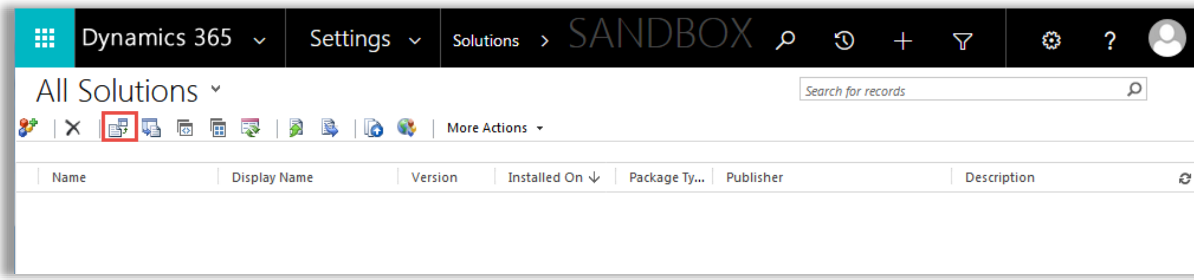
- You should be logged into Dynamics 365, Online or On-premises.

Installation & Configuration

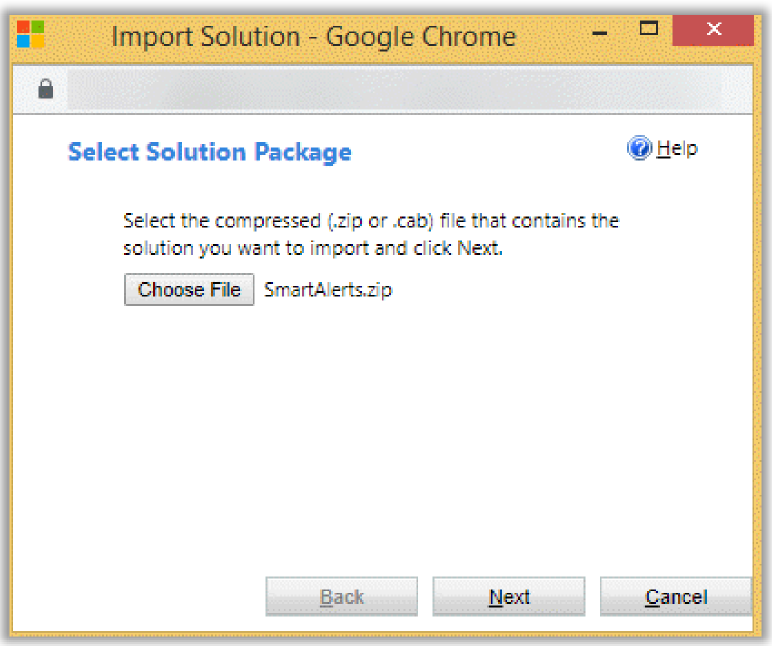
Installation Steps

To install 'Smart Alerts' plugin, the following steps has to be followed:

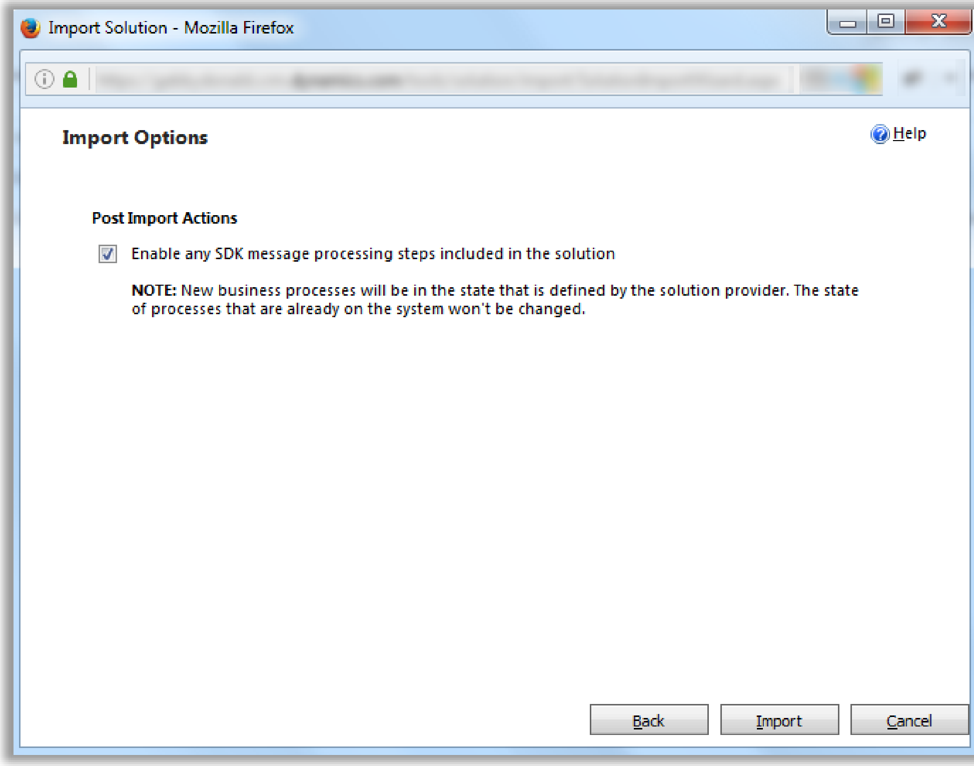
- On purchasing the plugin, you will get a zip file named **"SmartAlerts.zip"**.
- Login into your CRM Account and click **on Settings -> Solutions.**



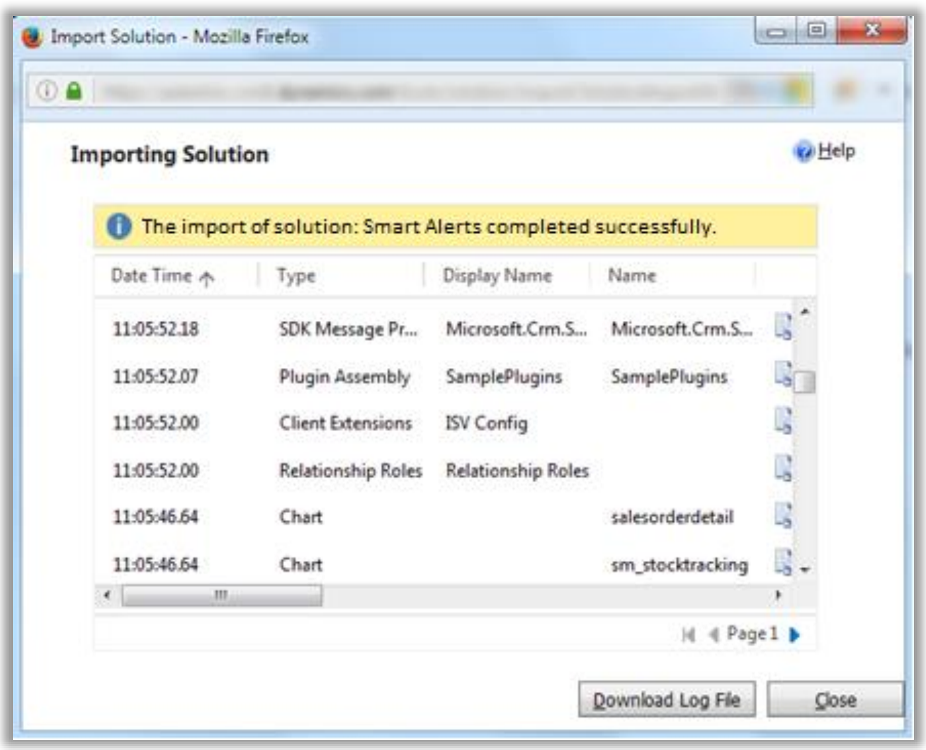
- Click on **'Import'** to upload and install the Solution.
- Click on **'Browse'** button and choose the Package Zip File for Smart Alerts from the Import Solution Window.



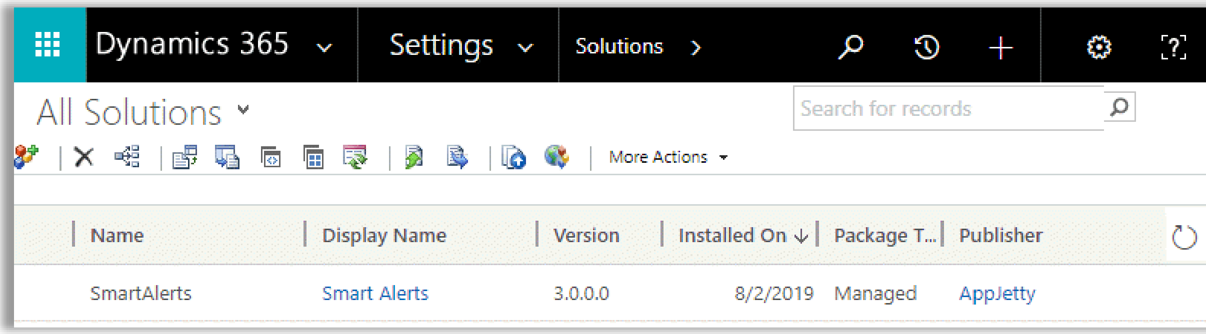
- Click on **'Next'** for further processing.



- Check the box to enable any SDK message processing steps included in the solution and click on **'Import'** button to Import the Solution.



- Click on **'Close'** after successful completion message is displayed.

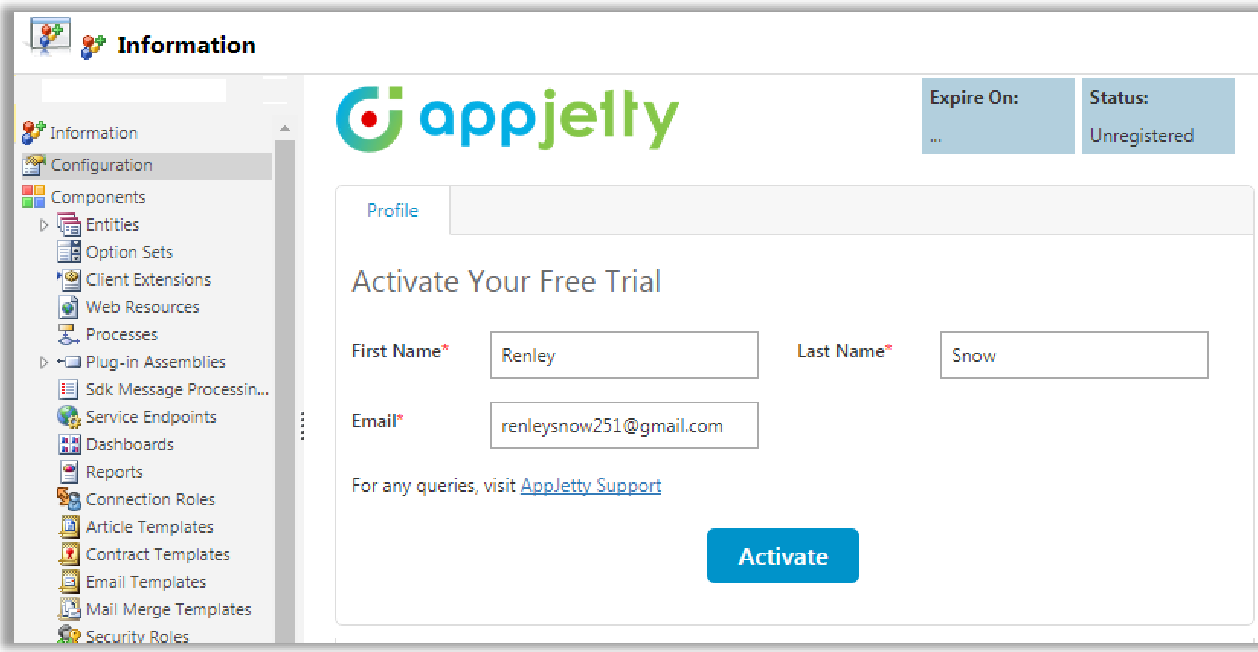


- Once you import the solution, it will be displayed in the solutions grid view.

Configuration Steps

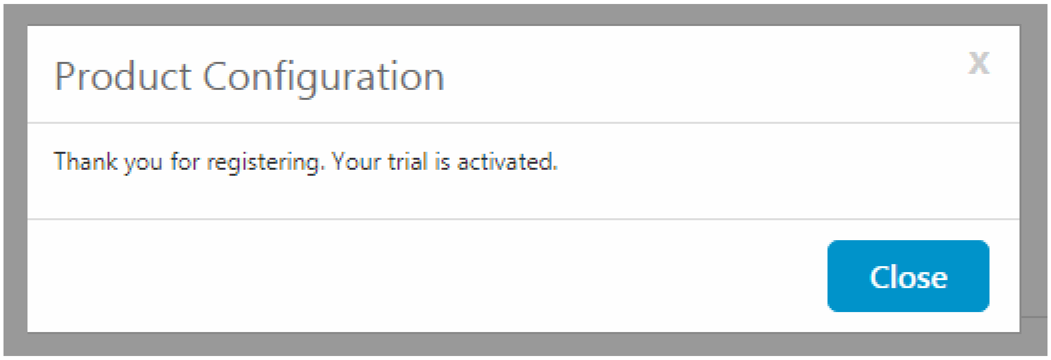
- Double click on **'Smart Alerts'** solution to configure the plugin with your license key.

- This will open a new window. Click on **'Configuration'** from the options provided on the left side.

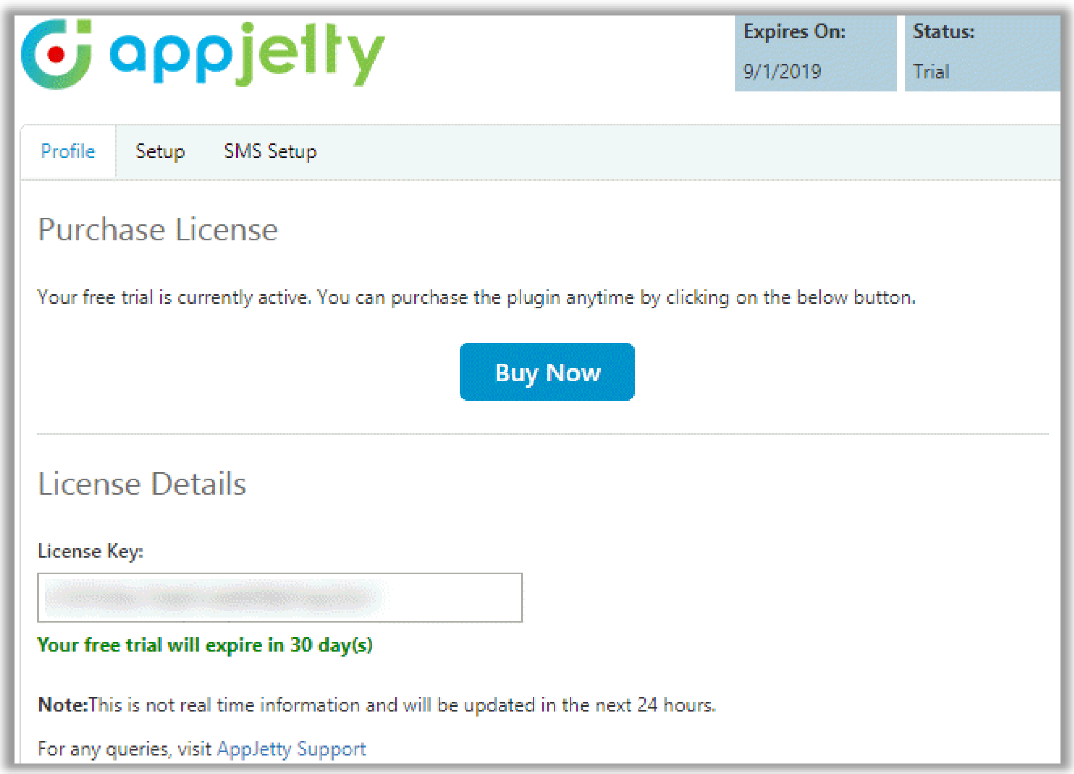


- You can activate your one-month free trial.

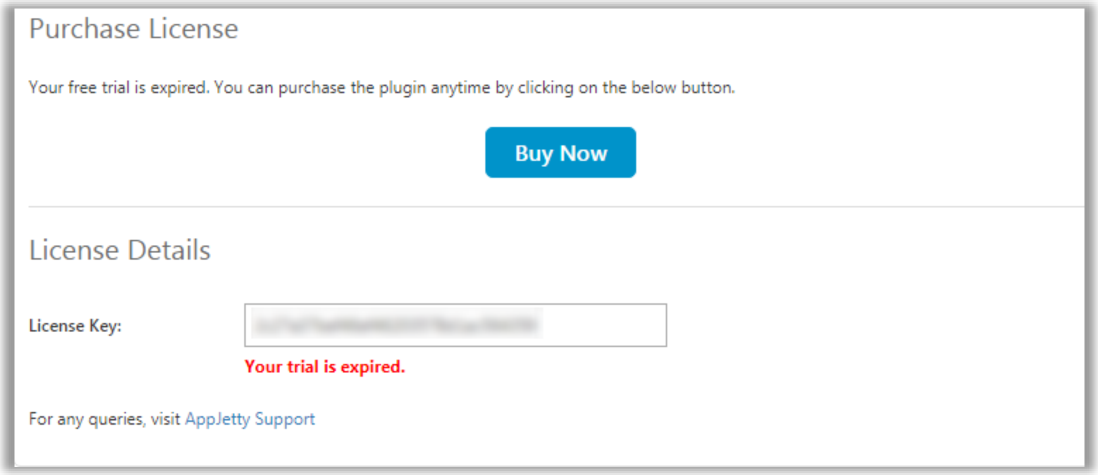
- To get a one-month free trial license key, fill out the details and click on **'Activate'** button.



- Your trial will get activated and expiry date will be displayed on top.

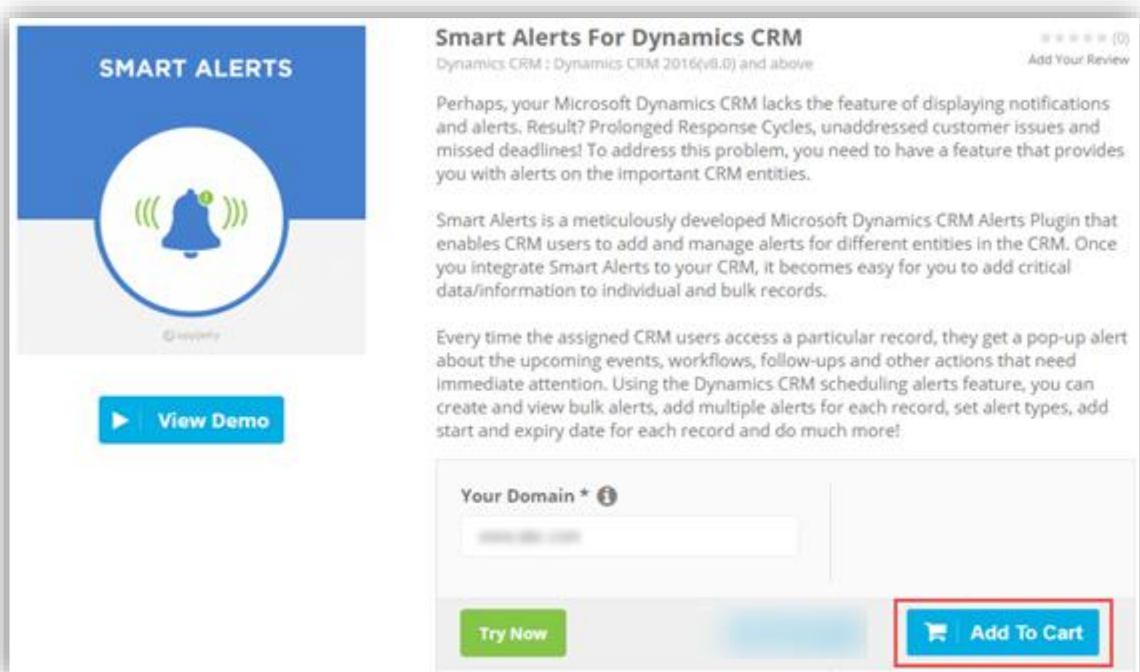


- You can purchase the licensed version any time. To purchase the license, click on **'Buy Now'** button.

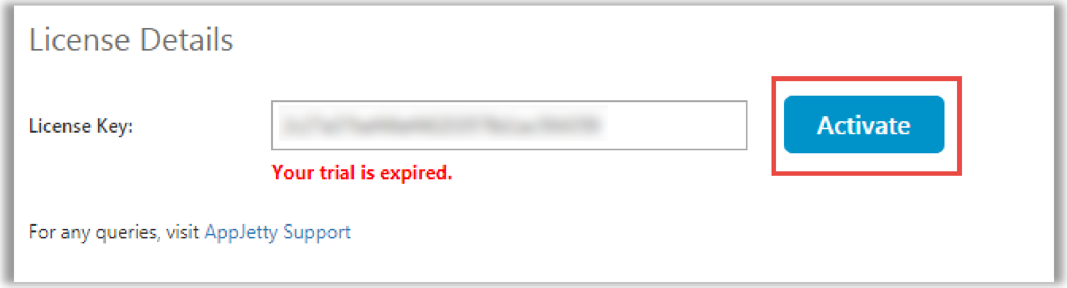


- On expiration of Trial, a message will appear that the trial has expired. Now to purchase the license click on **'Buy Now'** button.

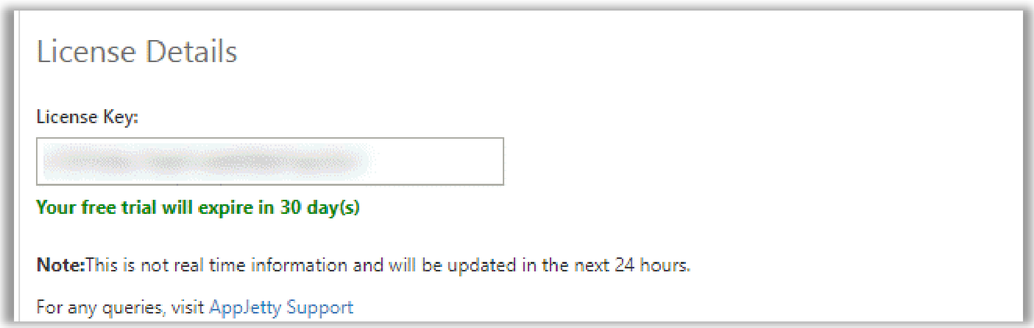
- This will redirect you to our product page and a pop-up will appear. Click on **'Add to Cart'** button and complete the purchase process.



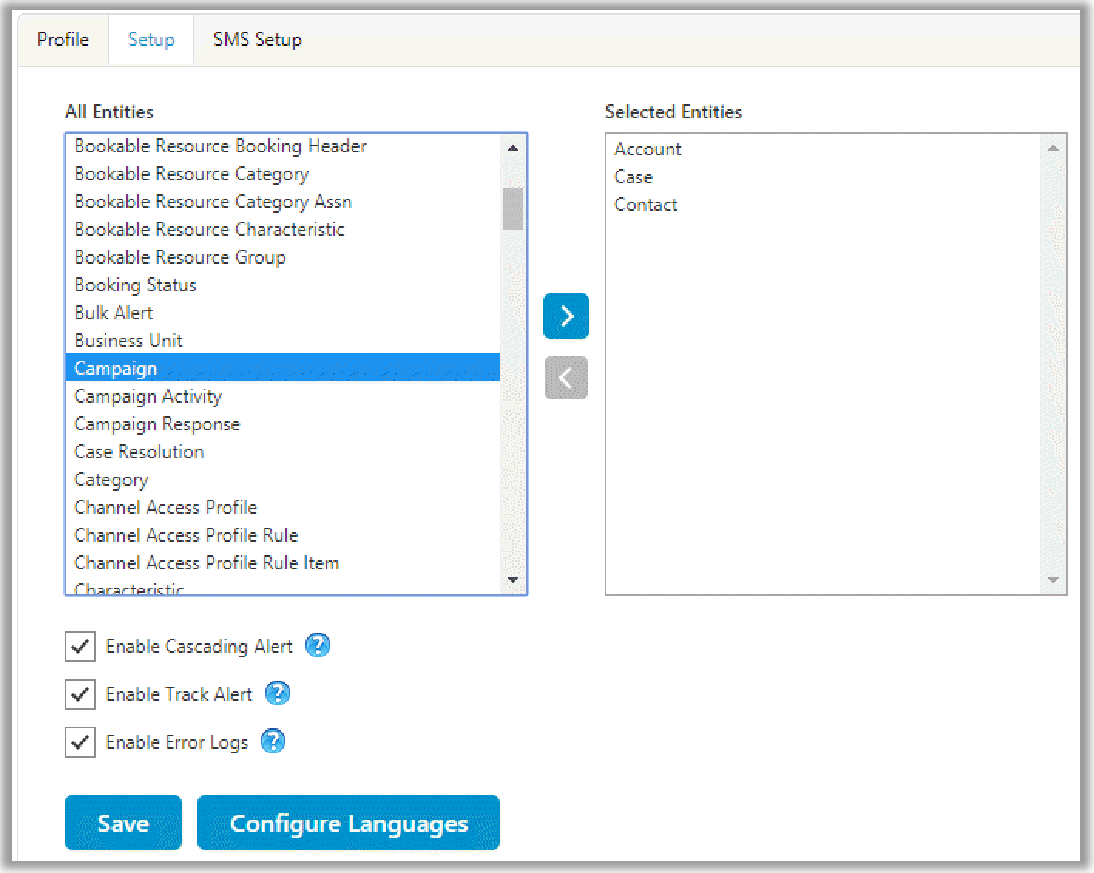
- On successfully completing the purchase process, you will receive your license key via email along with steps to complete the license configuration.



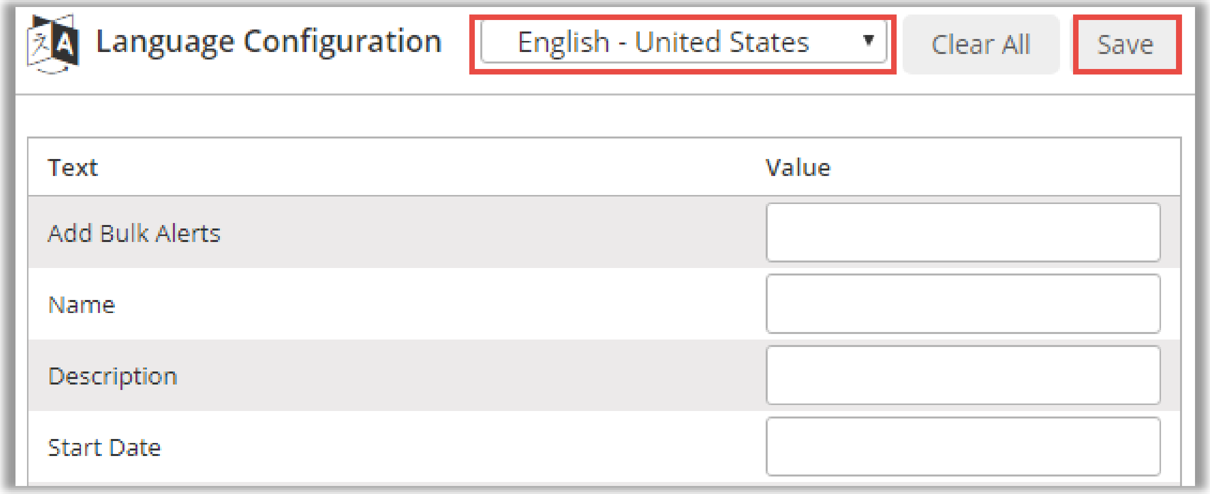
- Enter the New License key received on mail. This will enable the **'Activate'** button.
- Click on **'Activate'** button to activate your license.



- Once you have activated the license, **'Setup'** tab and **'SMS Setup'** tab will be displayed besides the **'Profile'** tab.
- To manage the default configuration settings, click on **'Setup'** tab.
- From **'Setup'** tab, you can move required entities to **"Selected Entities"** list from **"All Entities"** by using "**Add**" and "**Remove**" icon.



- Along with entity selection, manage settings for cascading alerts and tracking of alerts.
- Checking Enable Cascading Alert checkbox will enable cascading feature in smart alerts.
- Checking Enable Track Alert checkbox will enable track alerts feature in smart alerts.
- Checking Error Logs tracking checkbox will enable error log tracking in smart alerts.
- Click on **"Save"** button to save or update selected entities.
- Click on **"Configure languages"** button, to configure Smart Alert in any CRM supported language you want.

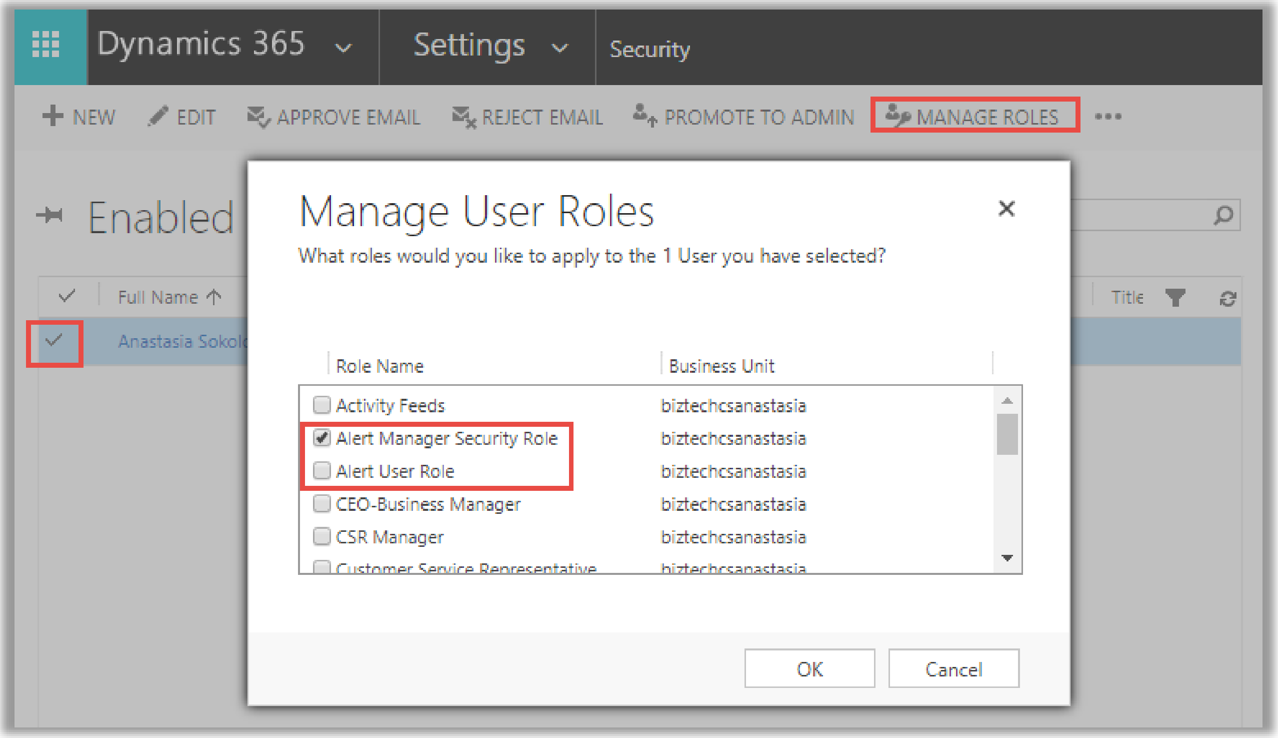


Note: User can use Smart Alerts on selected entities only.

- To manage the default SMS configuration settings, click on **'SMS Setup'** tab.
- Clicking on SMS Setup page, configure default Twilio API details, which you can directly use if you are already a registered user of Twilio.
- Check the checkbox to enable SMS alert.
- Upon enabling, enter your Twilio application Sid.
- Along with that enter Authentication token and "From" number, from which you want SMSs to be sent to your other users.
- Click on Save to configure this one-time SMS Setup.

Manage User Roles

- To assign roles to users, navigate to Settings -> Security -> Users
- In the list, select the user or users whom you want to assign a security role.
- Once users are selected, click on **"Manage Roles"** option from users list page.
- From dialog box, select the security roles you want to assign.

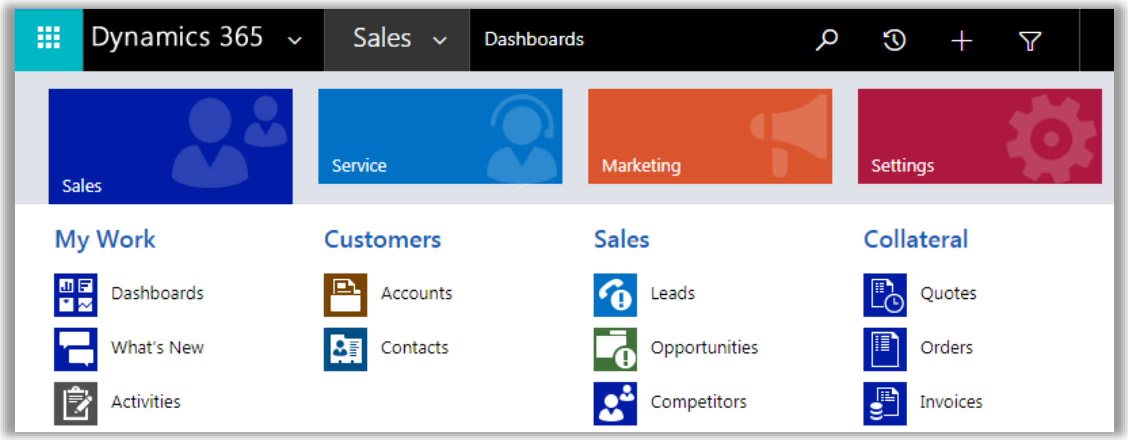


- You can set the following roles for a **Smart Alert Users**:
  - **Alert Manager Security Role**: CRM User will be able to create, view, edit and delete alerts.
  - **Alert User Role:** CRM User will be able to create, view and edit alerts. He/she will not be able to delete alerts.

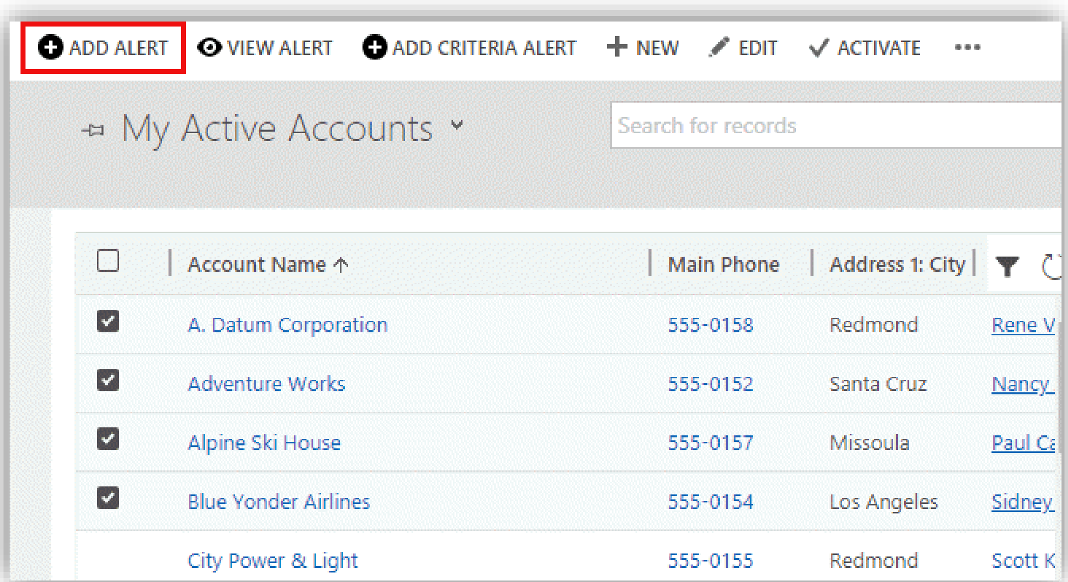
Procedure

Add Bulk Alert

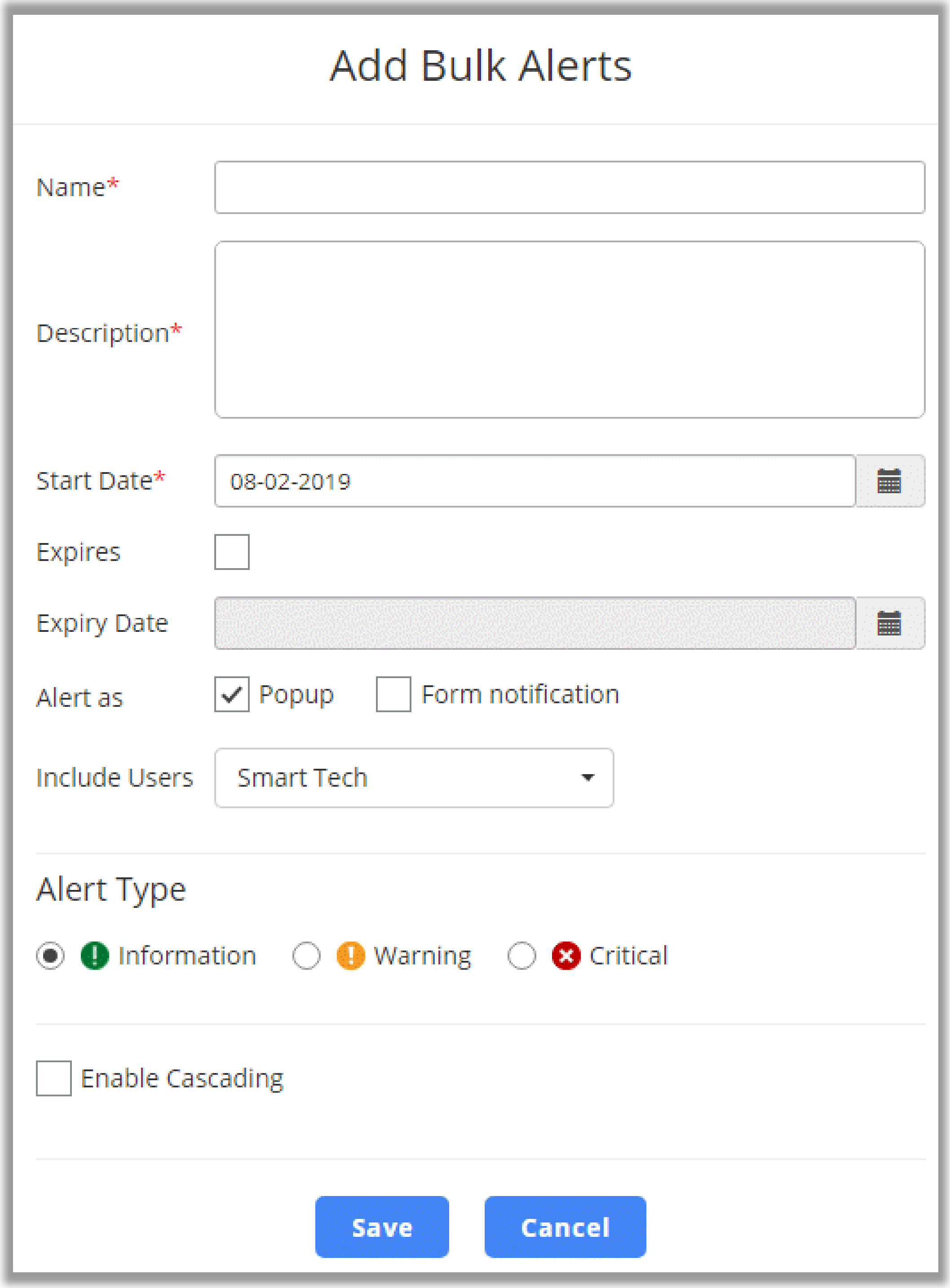
- Navigate to any entity for which you want to set alerts. For example, if you want to set alerts for contacts, go to **Sales -> Contacts.**



- Select records for which you want to set alert.



- Click on **"Add Alert"** button, this will open a new window for creating bulk alert, applicable for all records which are selected.



- **Name**: It will help to identify the alert by its name.
- **Description**: It will contain the brief description of alert.
- **Start Date:** It will hold the date from which the alert will be active.

- **Expires:** If it is checked, then it will hold the date on which your alert will expire.

- **Expiry Date:** It will set the expiry date for alert.

- **Alerts As:** Select the option of how you would like to view alert. It can either be pop up type or form notification. Based on your selection, alert will be displayed when particular record is opened.

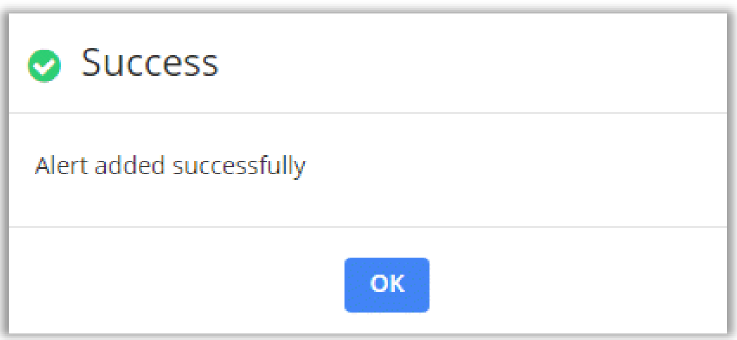
- **Include Users:** Select all those users, whom you want should be alerted of that particular activity. Once selected, only selected users will receive notifications on form or in pop up.

- **Alert Type**: It will set the alert type as **Information**, **Warning,** or **Critical**.

- **Enable Cascading**: It will allow to cascade the alerts of related entities` records with current entity record. So, for example: In account module, if contact's module records are set as cascading, then while accessing account, it will display alerts of account as well as contact's alert which are related to that account.

  Note: Cascading can only be set for listed entities: **Account, Contact, Case, Lead, Opportunity, Quote, Order** and **Invoice** modules.

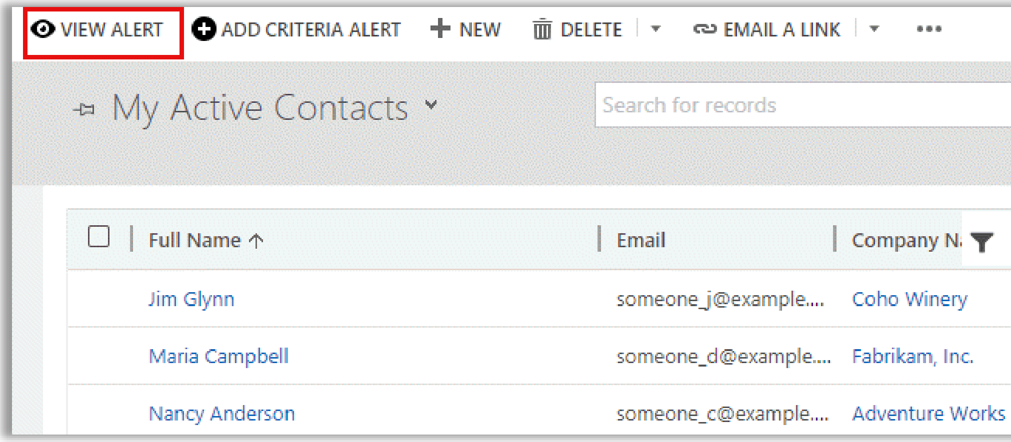
- Once you fill the details, click on **"Save"** button.



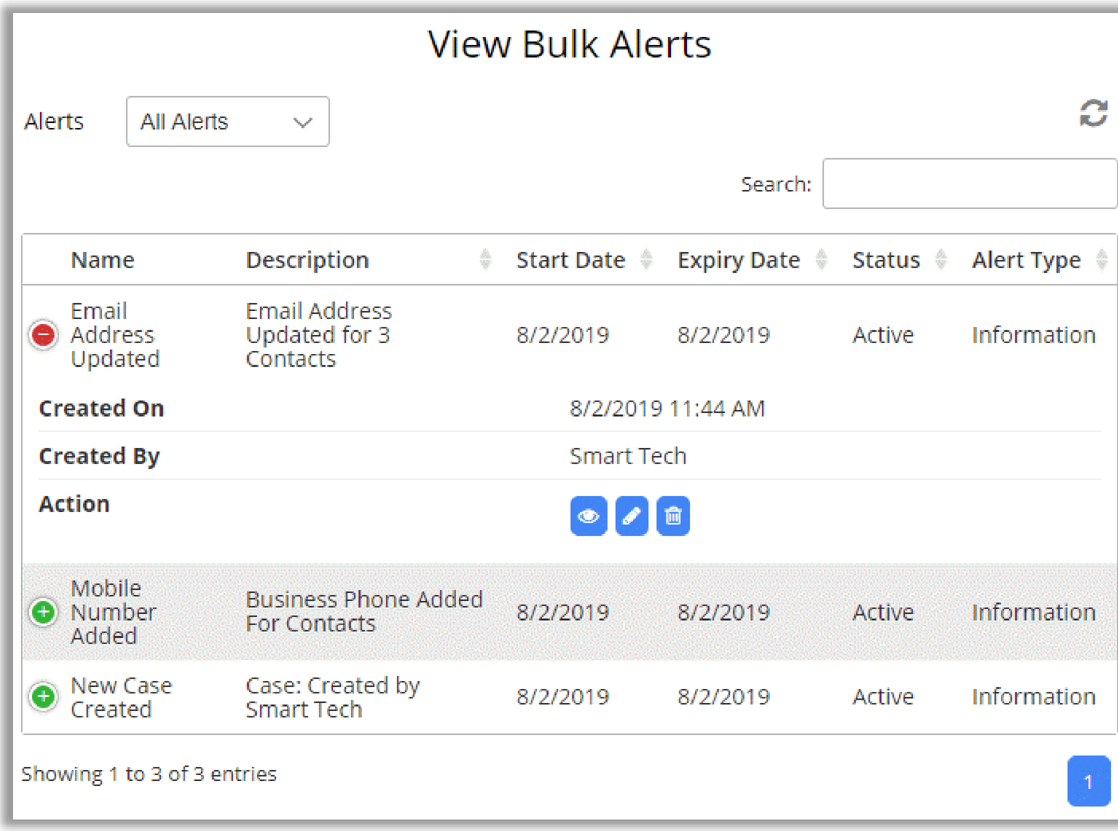
- It will display success/failure message.

View Bulk Alert

- Navigate to an entity for which you want to view alerts. For example, if you want to view alerts for contacts, go to **Sales -> Contacts.**

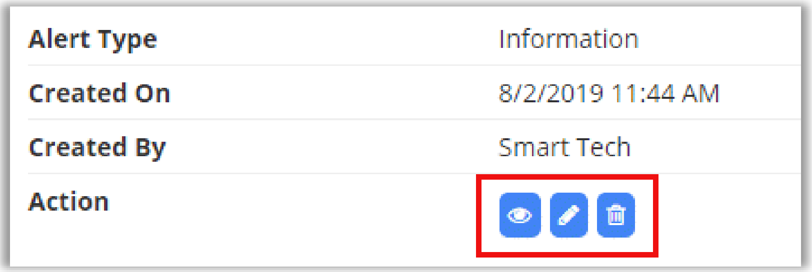


- Click on **'View Alert'** to view the list of bulk alerts and criteria alerts.

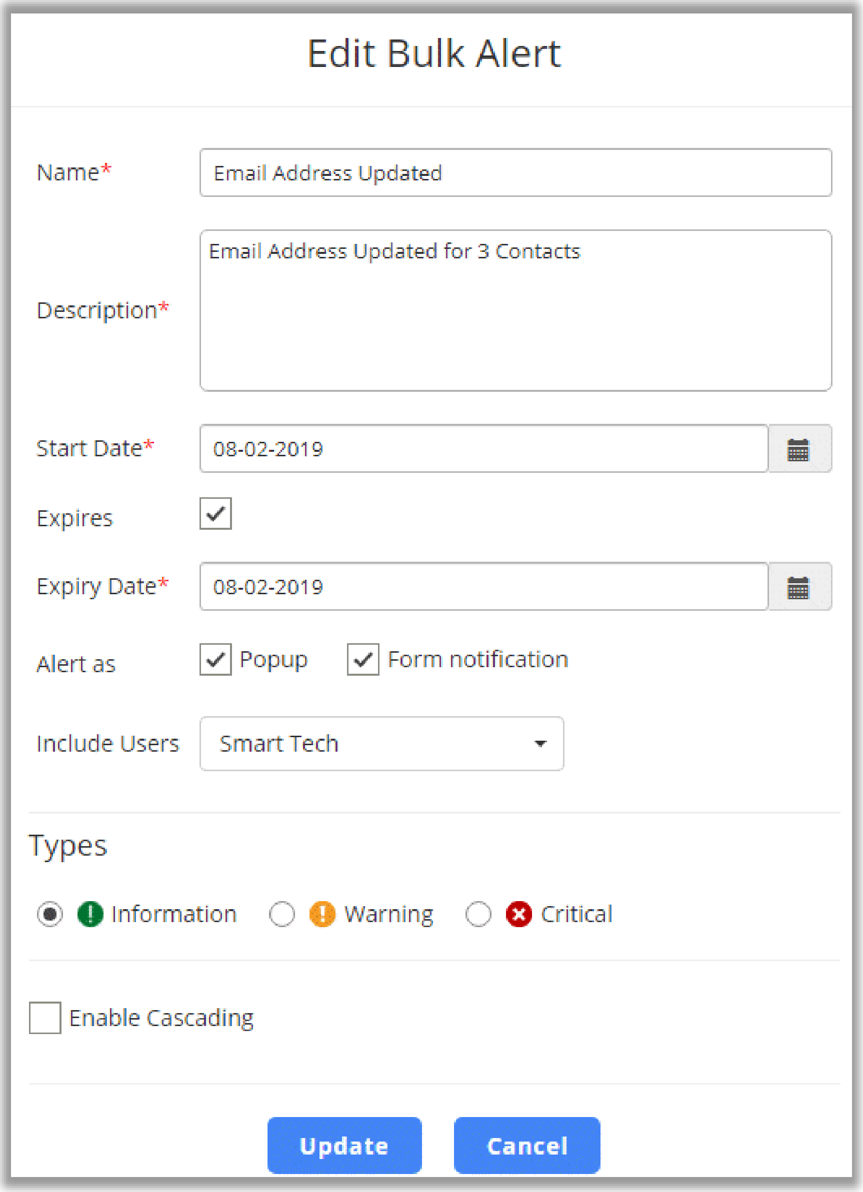


- List will also have option to filter alerts.

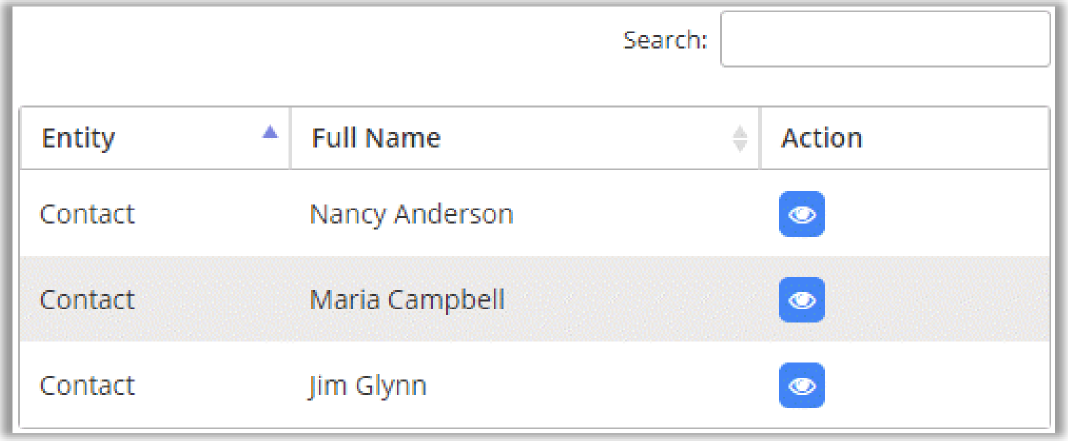
- Filter options are as below: -
    - **All Alerts -** It will list all alerts.
    - **Active Alerts -** It will list active alerts and you can **"Deactivate"** active alerts.
    - **Inactive Alerts -** It will list inactive alerts and you can **"Activate"** inactive alerts.
    - **Expired Alerts -** It will list expired alerts.
    - **Pop-up Alerts –** It will list all pop-up alerts.



- For alerts created, you can edit and delete them by clicking on action icons as required.



- In edit view, you can edit all the information as required and click on Update button to complete the changes.


Search:

Entity	Full Name	Action
Contact	Nancy Anderson	
Contact	Maria Campbell	
Contact	Jim Glynn	

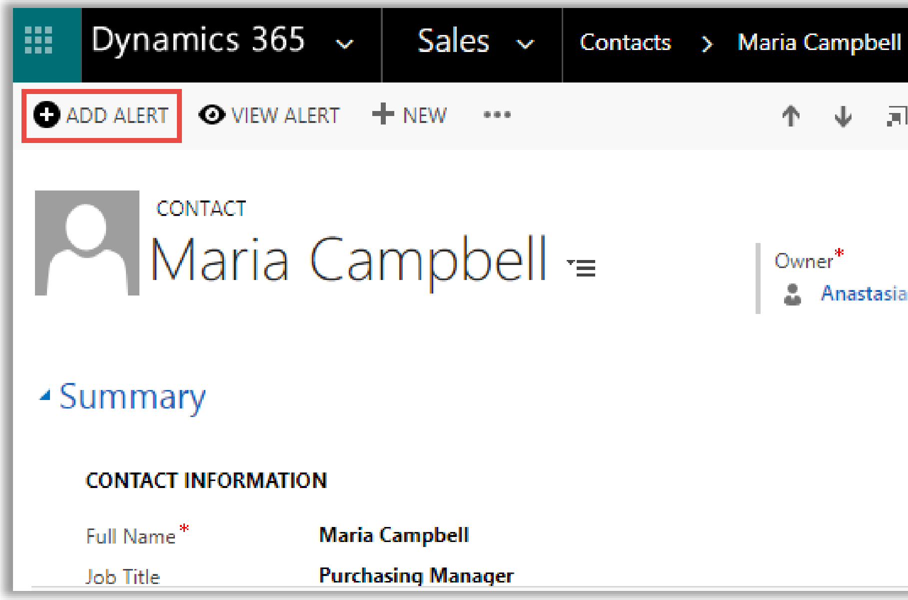
- On edit bulk alert, you can also view particular record for which that particular alert is created.

Note: Only user with **'Alert Manager Security Role'** or **'System Administrator Role'** will be able to delete an alert.

Add Alert

- Navigate to an entity for which you want to set alerts. For example, if you want to set alerts for contacts, go to **Sales -> Contacts.**

- Click on record name and navigate to detail view of that particular record.



- Click on **"Add Alert"** button to add new alert and fill require details as mentioned below: -

- **Name**: It will help to identify the alert by its name.

- **Description**: It will contain the brief description of alert.

- **Start Date:** It will hold the date from which the alert will be active.

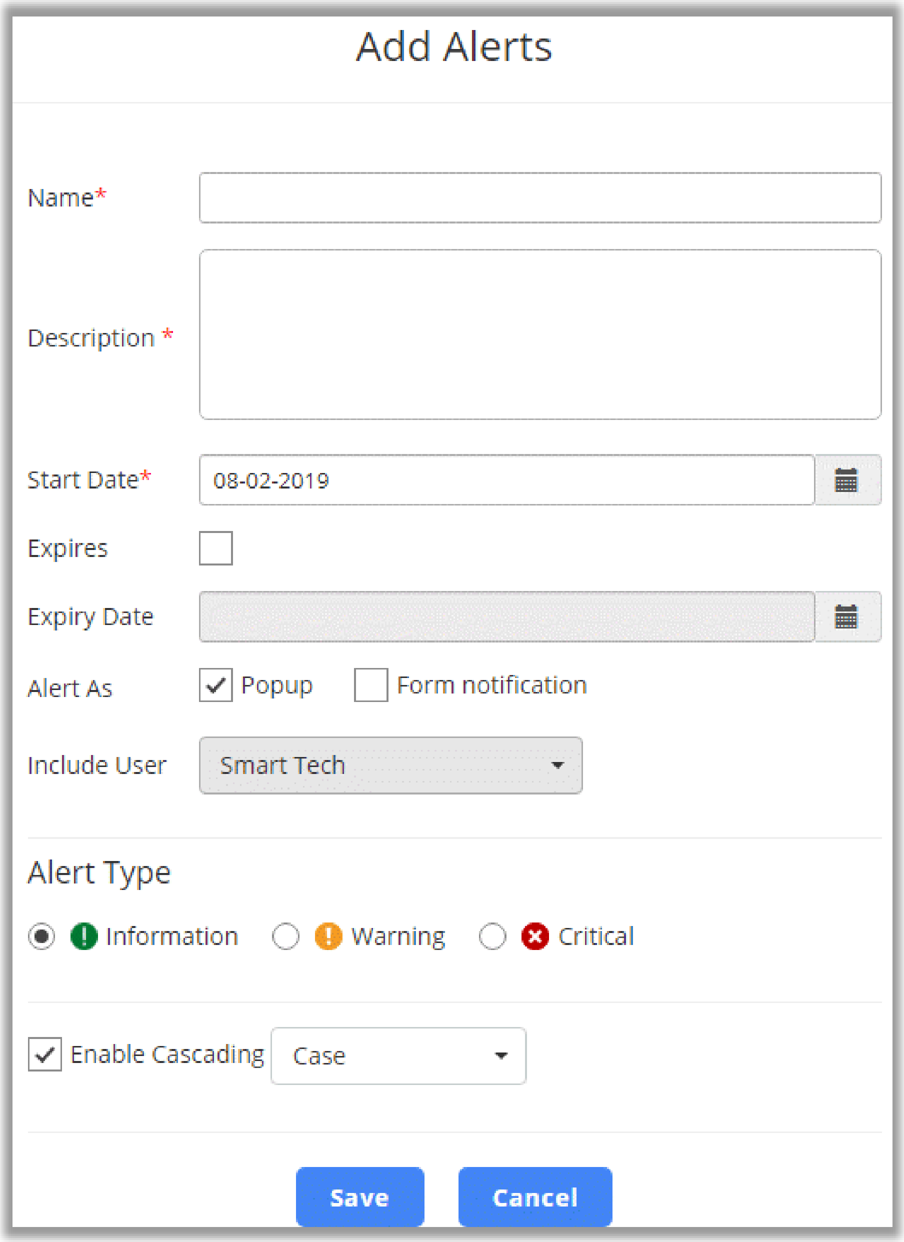
- **Expires:** If it is checked, then it will hold the date on which your alert will expire.

- **Expiry Date:** It will set the expiry date for alert.

- **Alerts As:** Select the option of how you would like to view alert. It can either be pop up type or form notification. Based on your selection, alert will be displayed when particular record is opened.

- **Include Users:** Select all those users, whom you want should be alerted of that particular activity. Once selected, only selected users will receive notifications on form or in pop up.

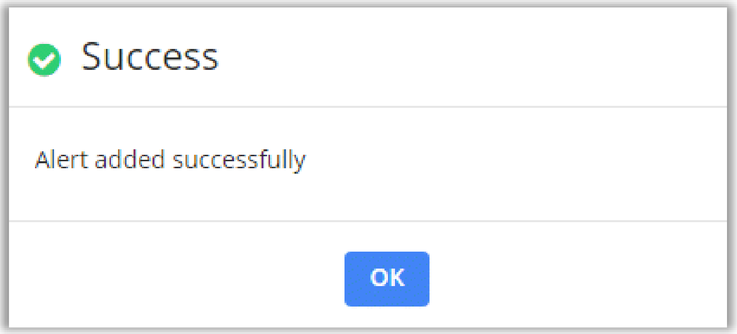
- **Alert Type**: It will set the alert type as **Information**, **Warning,** or **Critical**.



- **Enable Cascading**: It will allow to cascade the alerts of related entity's records with current entity record. So, for example: If in account module, contact's module records are set in cascading, then while accessing account it will display alerts of account as well as contact's alert which are related to that account.

Note: Cascading can only be set for listed entities: **Account, Contact, Case, Lead, Opportunity, Quote, Order** and **Invoice** modules.

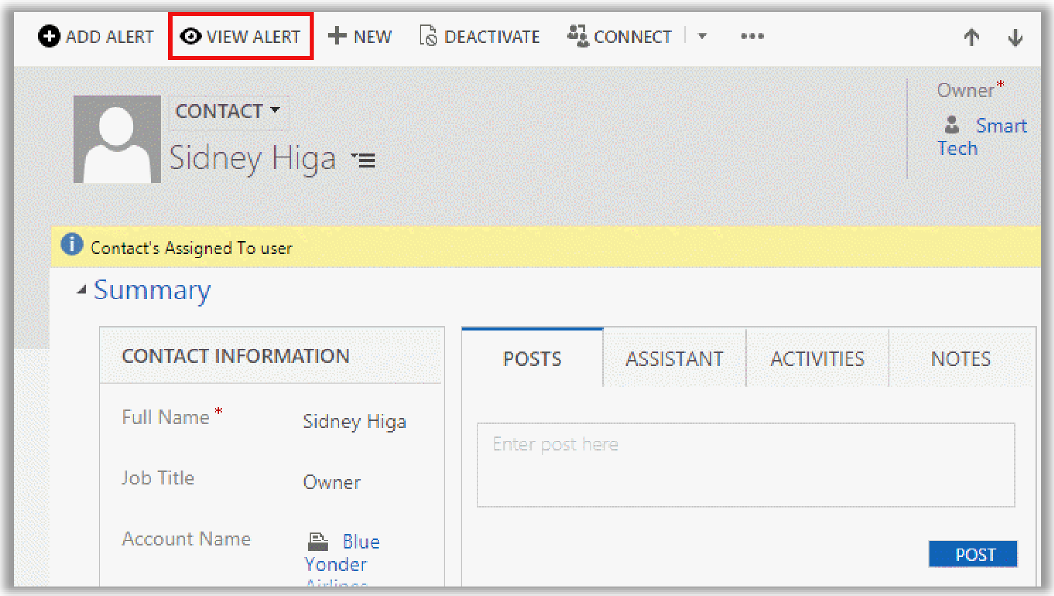
- Once you fill the details, click on **"Save"** button.



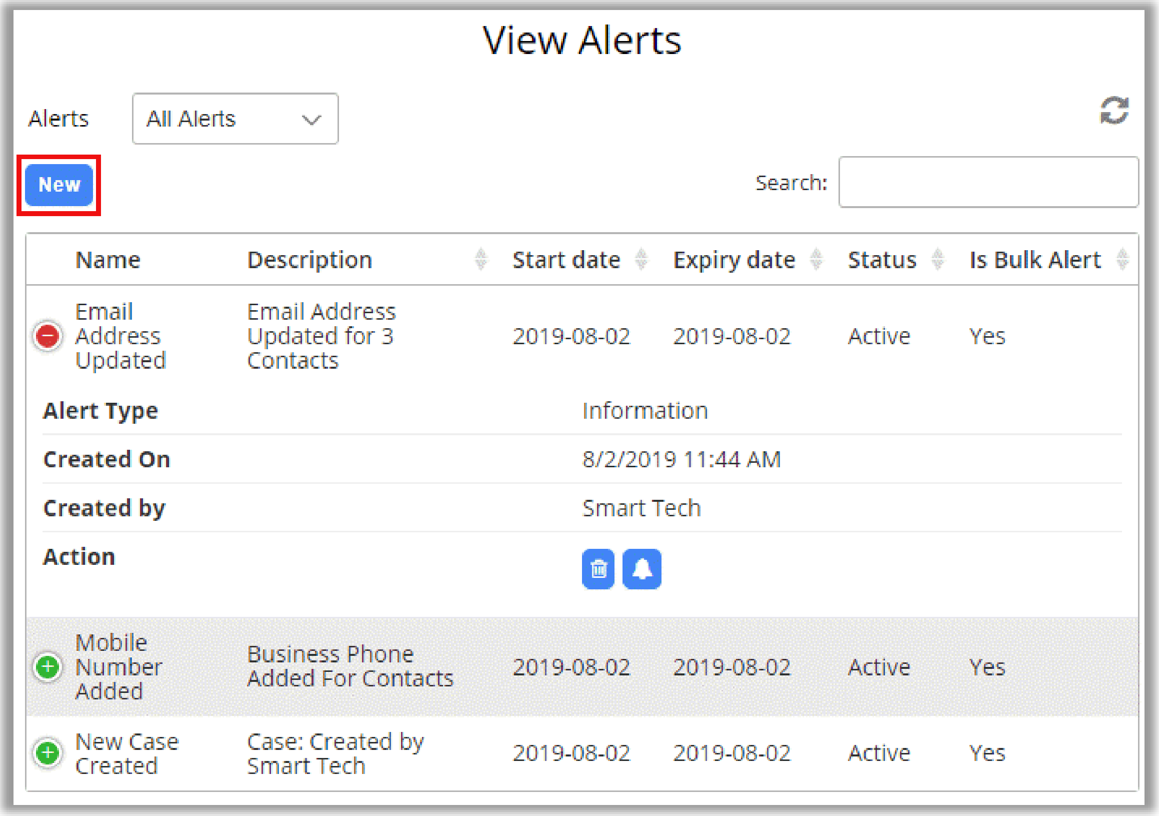
- It will display success/failure message.

View Alert

- Navigate to detail view of that particular record.



- Click on **"View Alert"** to view the list of alerts.

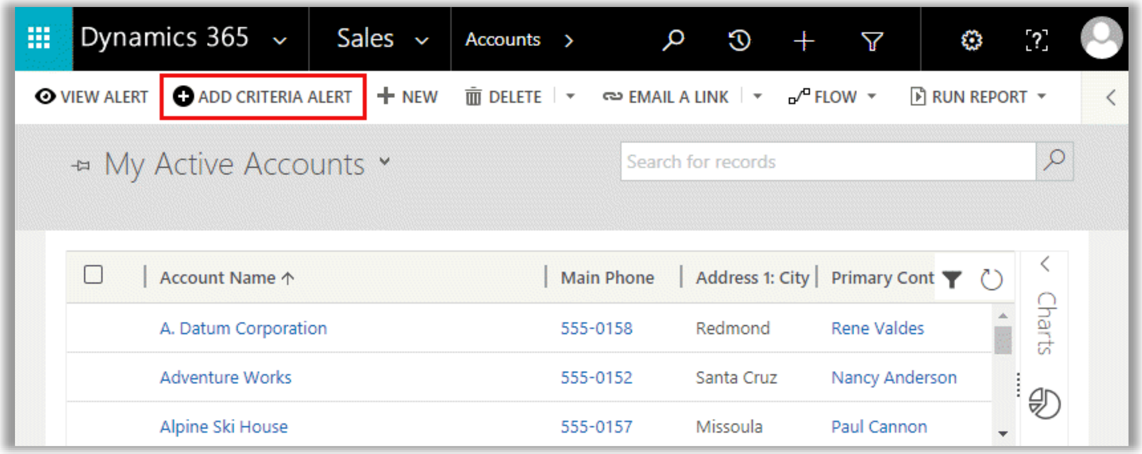


- The list will also have option to filter alerts.
- Filter option are as below: -
    - **All Alerts -** It will list all alerts.
    - **Active Alerts -** It will list active alerts and you can **"Deactivate"** active alerts.
    - **Inactive Alerts -** It will list inactive alerts and you can **"Activate"** inactive alerts.
    - **Expired Alerts -** It will list expired alerts.
    - **Pop-up Alerts –** It will list all pop-up alerts.
- For alerts shows, you can edit, delete as well as track alerts.
- You can add new alert from view page by clicking on **"New"** button.

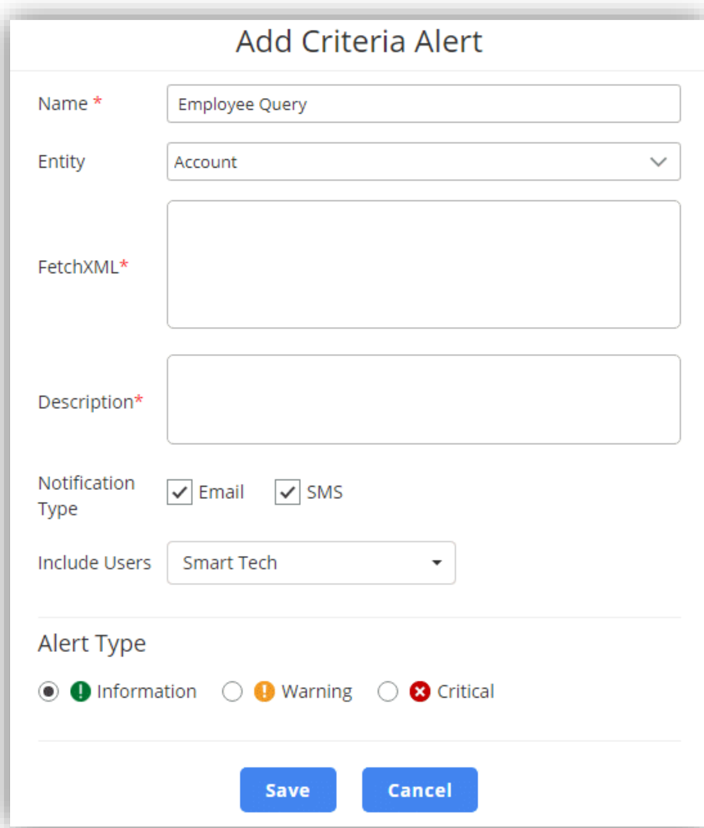
Note: Bulk alerts can only be edited and viewed from bulk alert list.

Add Criteria Alert

- Navigate to any entity for which you want to set criteria alerts. For example, if you want to set alerts for accounts, go to **Sales -> Accounts.**



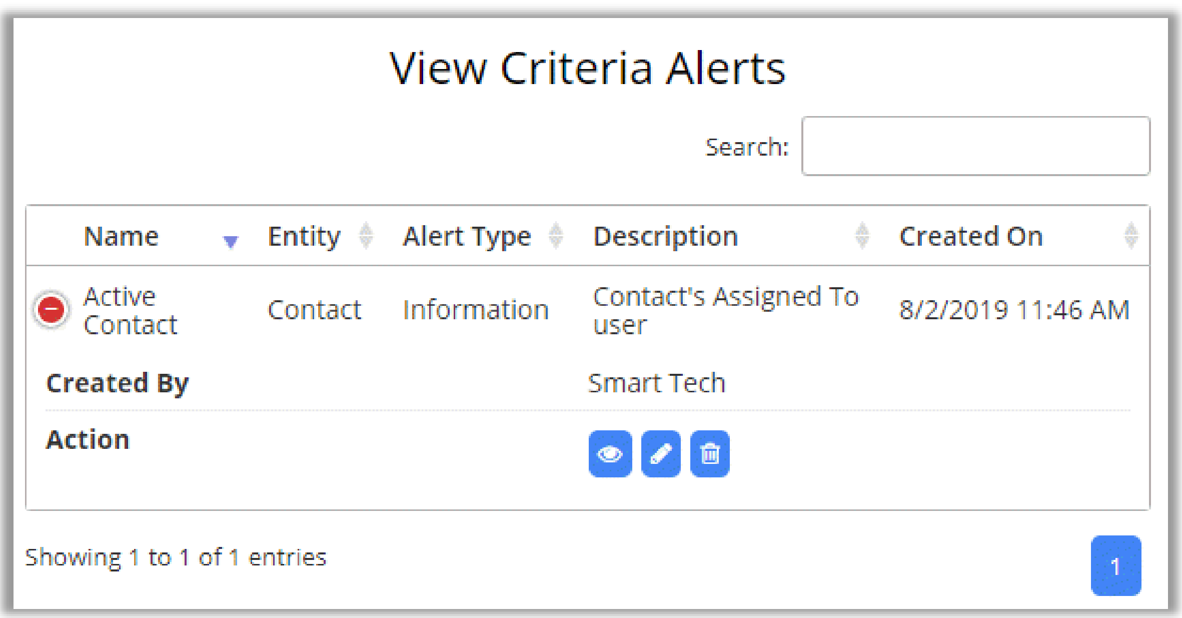
- Click on **"Add Criteria Alert"** button, this will open a new window for creating criteria alert, applicable for all records as mentioned in the query.



- **Name**: It will contain the brief description of alert.
- **Entity**: It will show the entity name for which the alert is being set.
- **FetchXML:** User needs to add FetchXML Query file.
- **Description:** Add the description of the alert that you wish to view.
- **Notification Type:** For critical alert by default form notification is shown upon accessing a particular record. Other than that, you can select Email and SMS as the notification form. SMS option will be shown only when SMS set up has been done.
- **Include Users:** You can select users to whom alert should be shown.
- **Alert Type**: It will set the alert type as **Information**, **Warning** or **Critical**.
- Once you fill the details, click on **"Save"** button.
- It will display success/failure message.

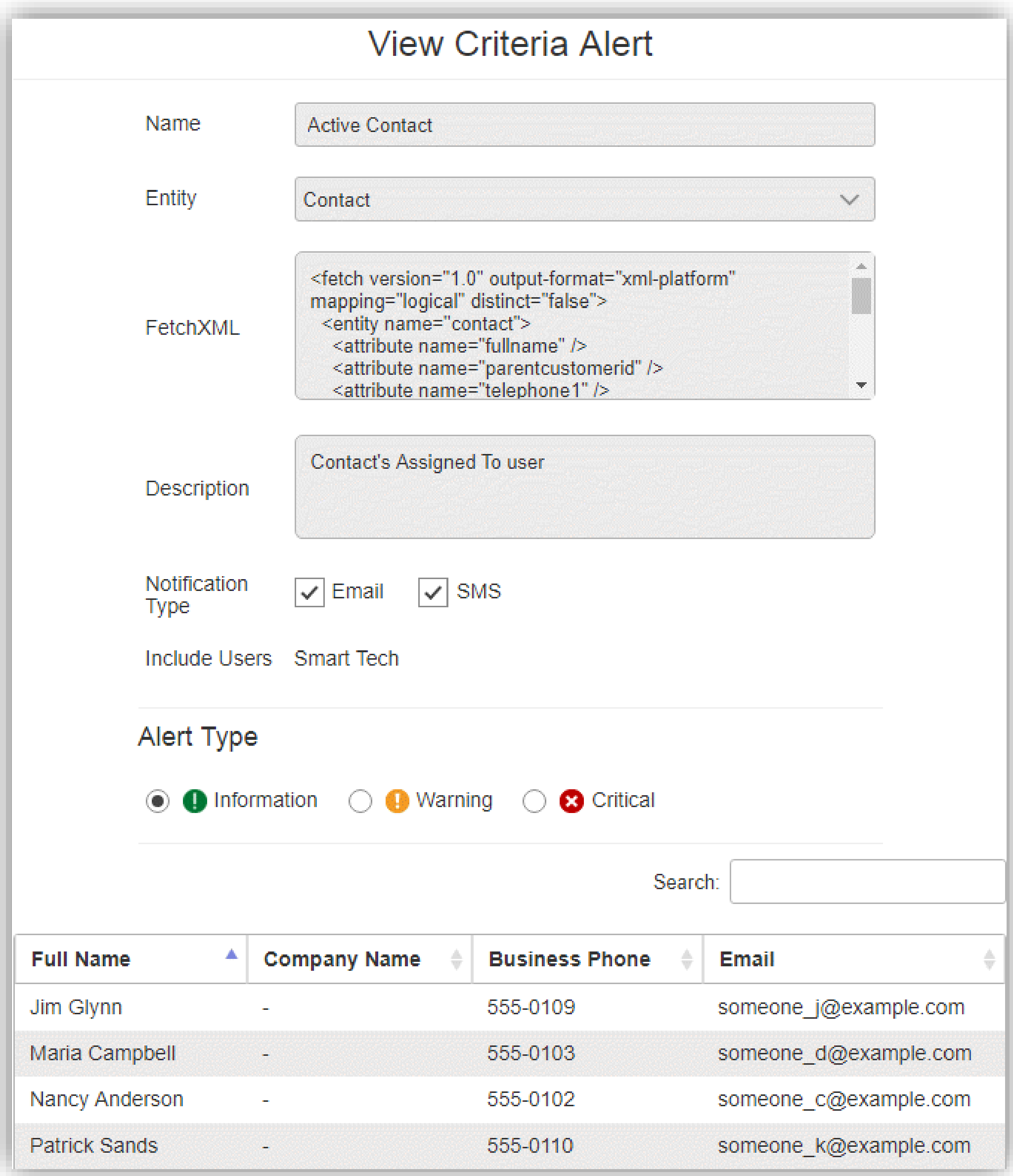
View Criteria Alert

- Navigate to an entity for which you want to view criteria alerts. For example, if you want to view alerts for contacts, go to **Sales -> Contacts.**



- Clicking on **'View Alerts'**, user will also be able to view criteria alerts created for the particular entity.

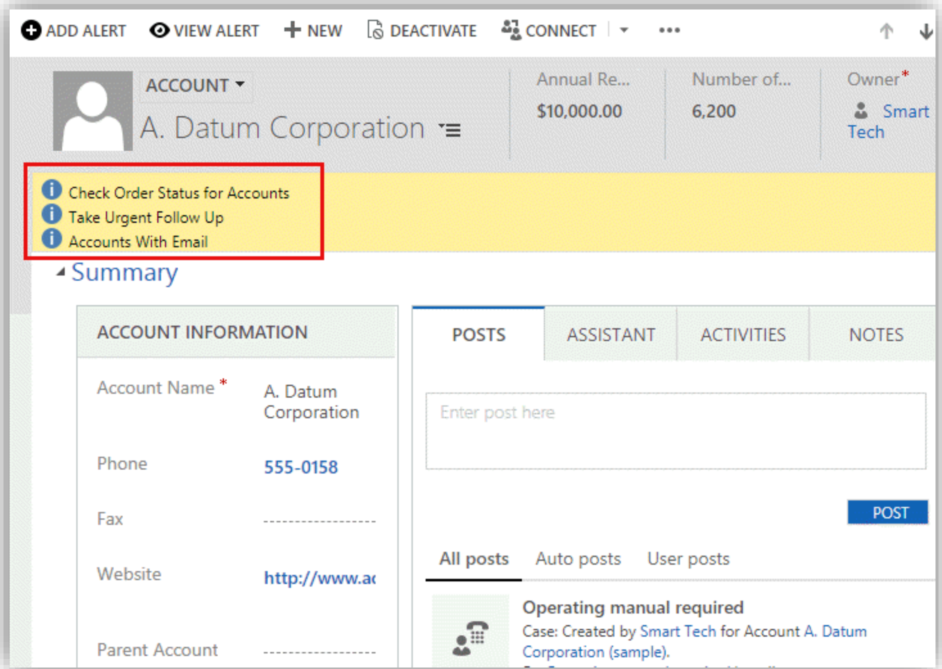
- For each criteria alert, there are different action buttons like View, Edit and Delete.



- Clicking on View, you also get to know with which records criteria alert is associated to.

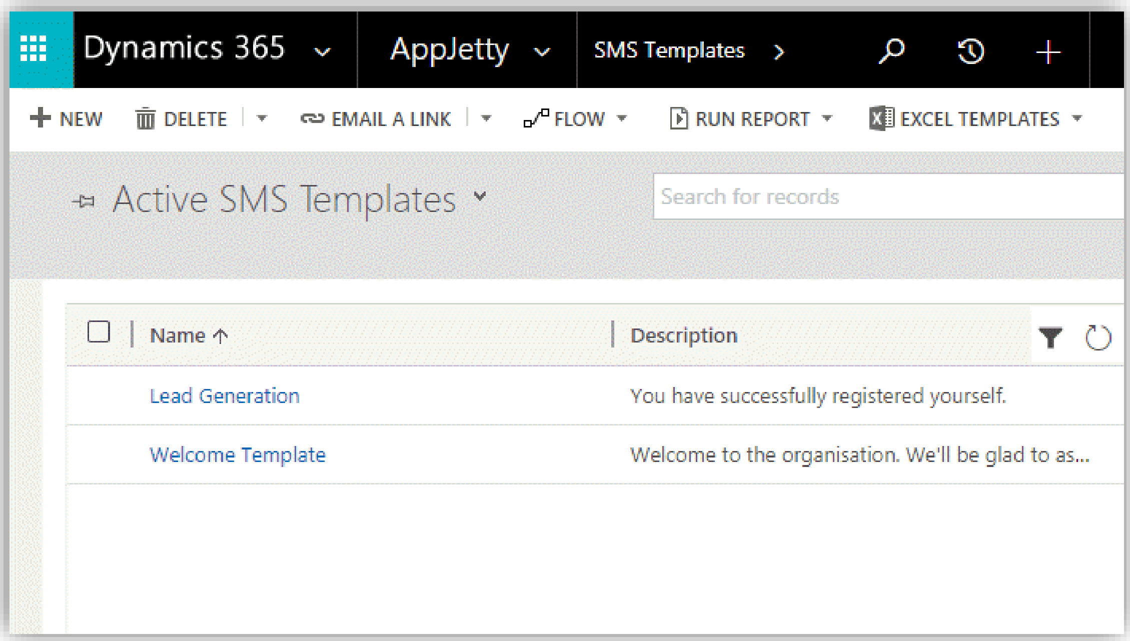
- If you have checked the email option at the time of adding criteria alert, on fulfilling the alert condition, you will get an email.

- Also, if you access any record, then on its open action it will display criteria alert messages as form notification, as shown below, for that particular record.



SMS Alert

- SMS Alerts are sent for criteria alerts as well as process-based SMSs. Criteria SMS alert will be sent only when records matching those criteria have phone numbers associated with them.
- For all SMS alerts created or sent, you can view them under Activities -> All SMS Messages.
- For adding SMS description, you can also choose pre-defined description in form of templates. These SMS templates are available within AppJetty > SMS Templates.



- On navigating to SMS templates, you can view the list of all created templates. You can create as many templates as you want by clicking on New button.

Note: SMS templates option will be available only when SMS setup is done.

Popup Alert

- If you access any record, then on its open action it will display popup alert message for that particular record sliding from the right which can be collapsed and expanded as required.

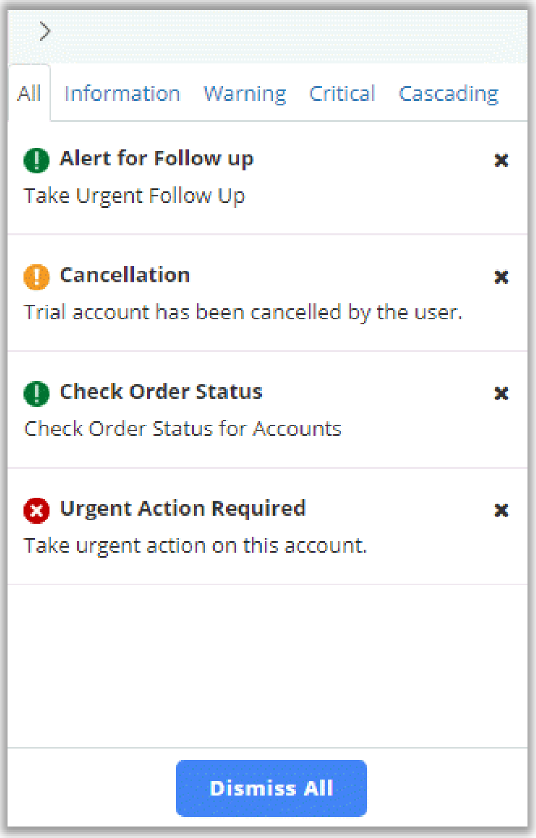
- In the pop up, alerts are bifurcated based on alert type like Information, Warning, Critical, Cascading. Also, it has All section that lists out all the alerts.

Track Alerts

- From the pop up, user gets option to dismiss alert. Any alert once dismissed will get removed as pop up notification which means it won't be available on again opening the record in the pop up.

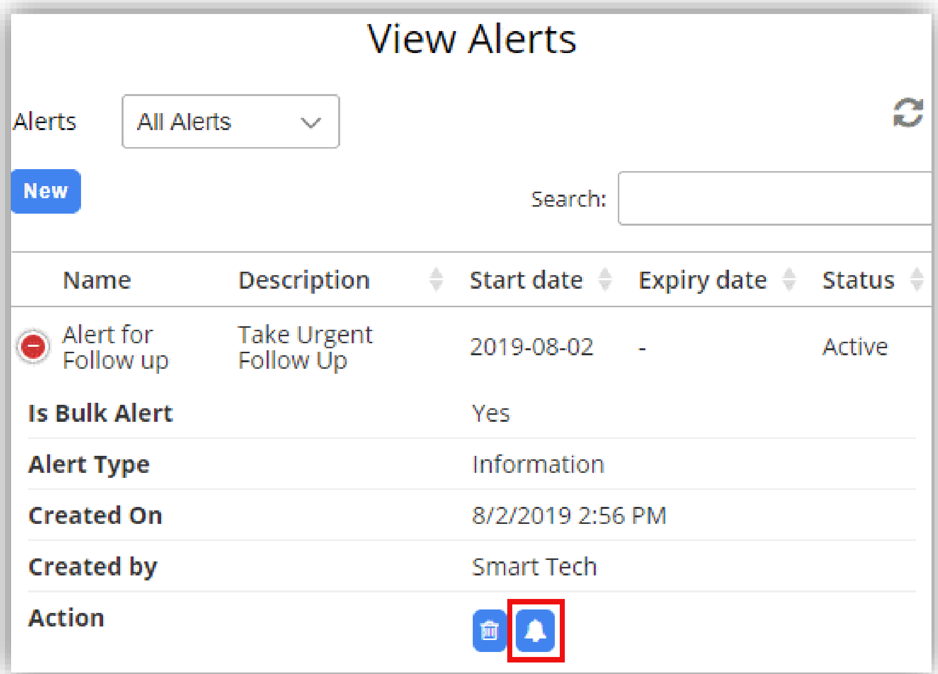
- To dismiss an alert, you may just click on the cross icon available with every alert and to dismiss all alert at once just click on Dismiss All button.

Note: Alerts that are not dismissed, are marked as read under alert track status.

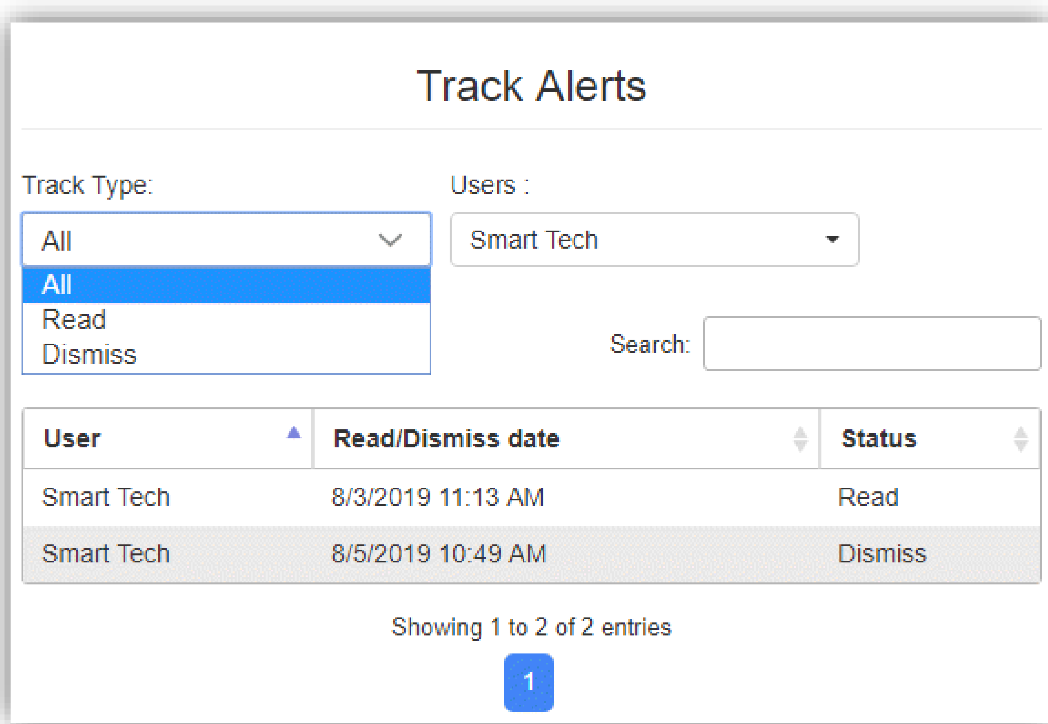


- Admin user can view the status of the record i.e. If it is read or dismissed from the detail view of the particular record.

- Navigate to detail view of the record, click on View Alert option. Click on bell icon available with each alert record.

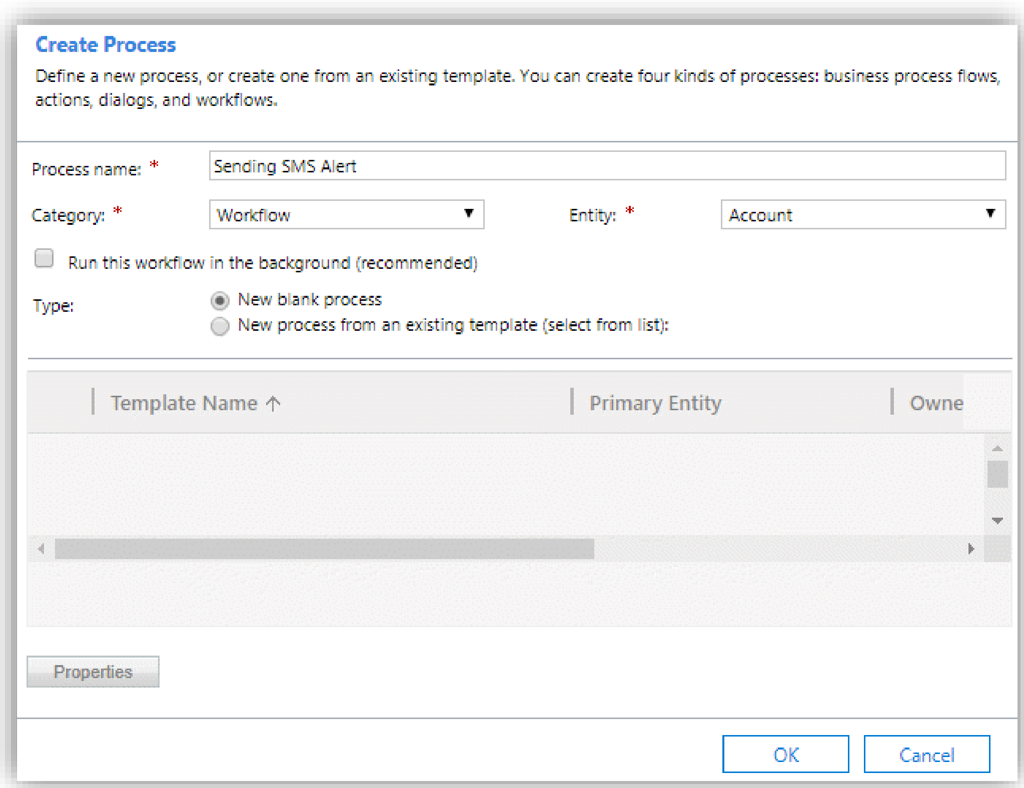


- Clicking on the icon, track alerts screen shows up that status of particular alert. You can further filter results based on users or track status as required.

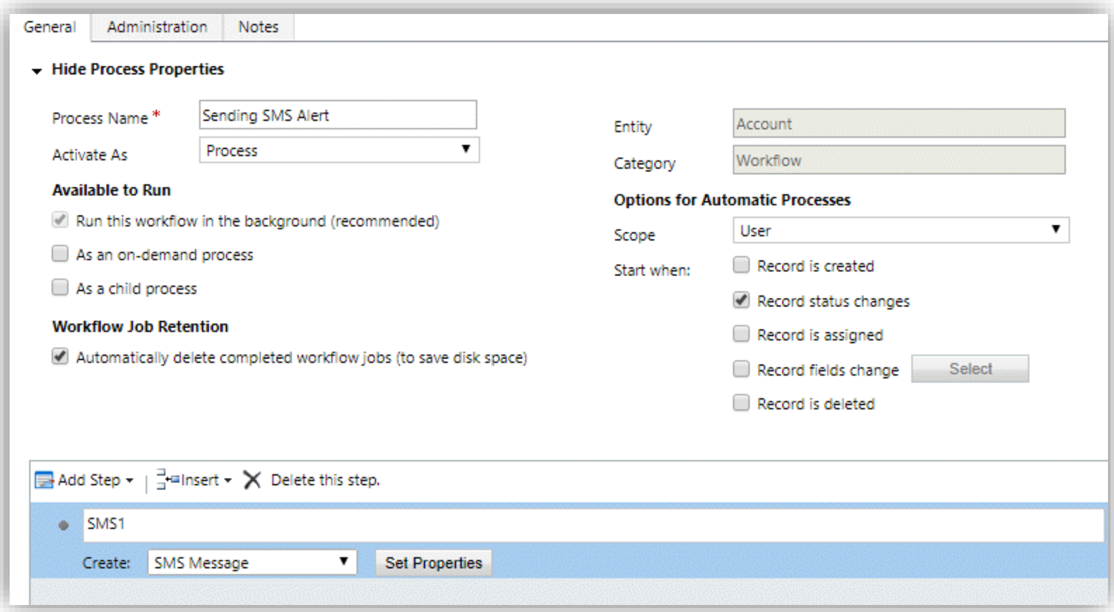


Send SMS via process

- To send SMS using workflow, you need to follow default CRM flow for creating workflows.
- Navigate to Settings > Processes
- Select New to create a new process. Enter valid process name, entity for which the process is being created and select Workflow as the Category.

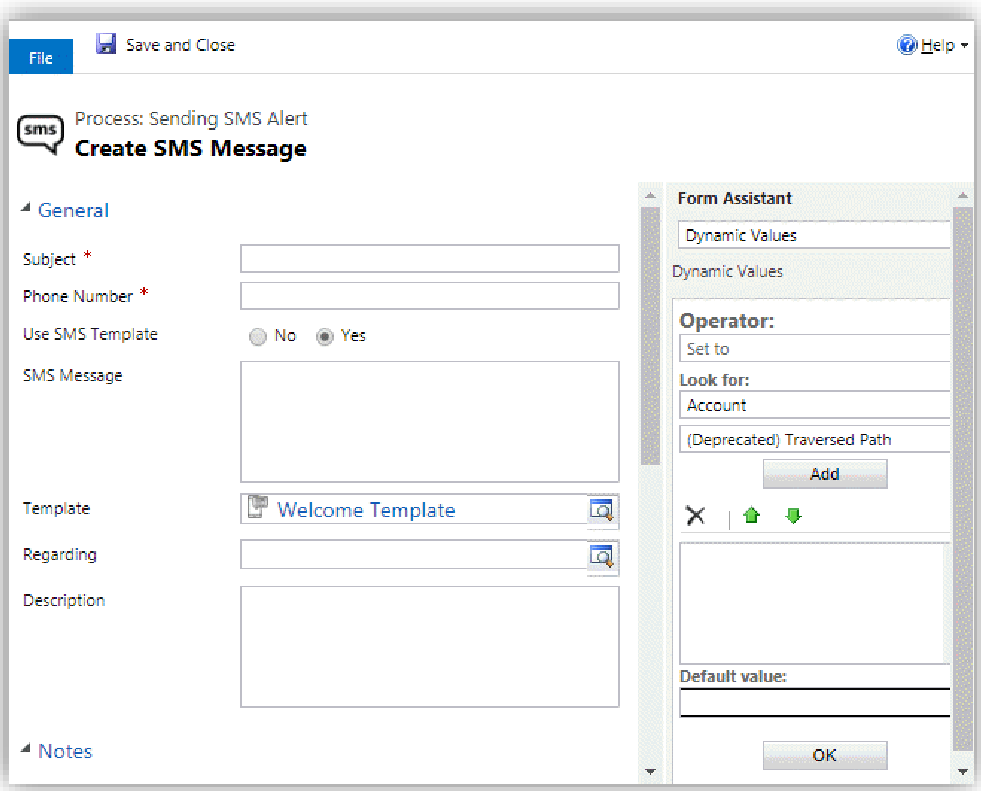


- Click on Ok to proceed further.
- Here you may select the action as required for workflow to work.
- For SMS to be sent, you need to create a message record.

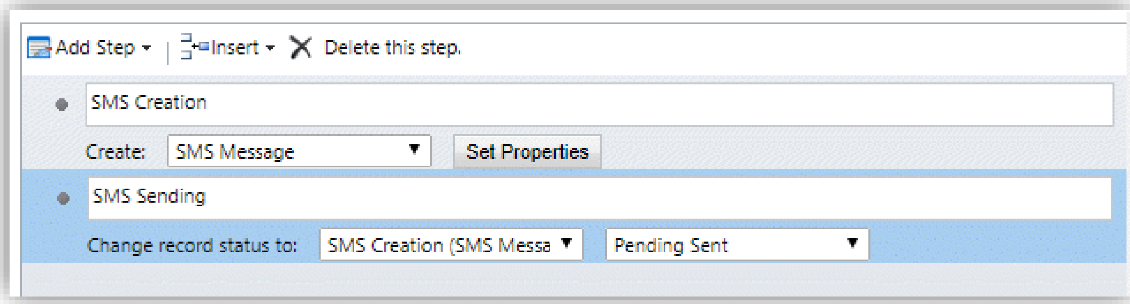


- For creating message record, you need to select SMS Message from the option and you need to set properties as required.

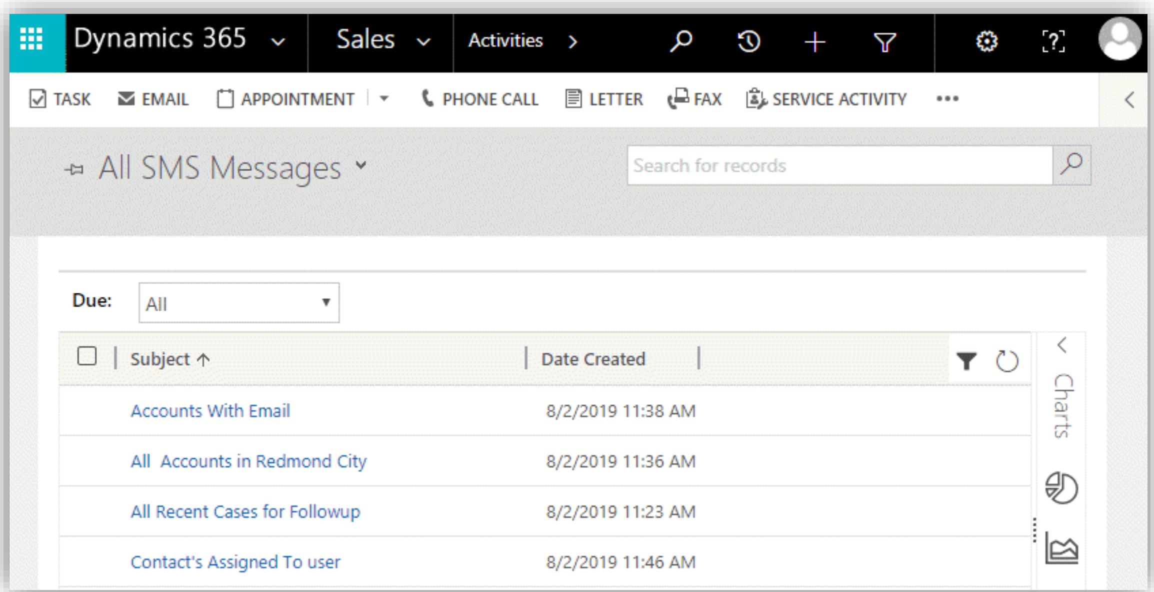
- Under set properties, you need to enter the phone number or fetch it from dynamic values.



- You must also enter the SMS Message or select message based on SMS template. For SMS templates you can select template from the look up selection.
- This would just create SMS record, in order to send SMS message, another step needs to be created within the same workflow process that triggers sending of the SMS.
- Add one more step and select option Change Status.

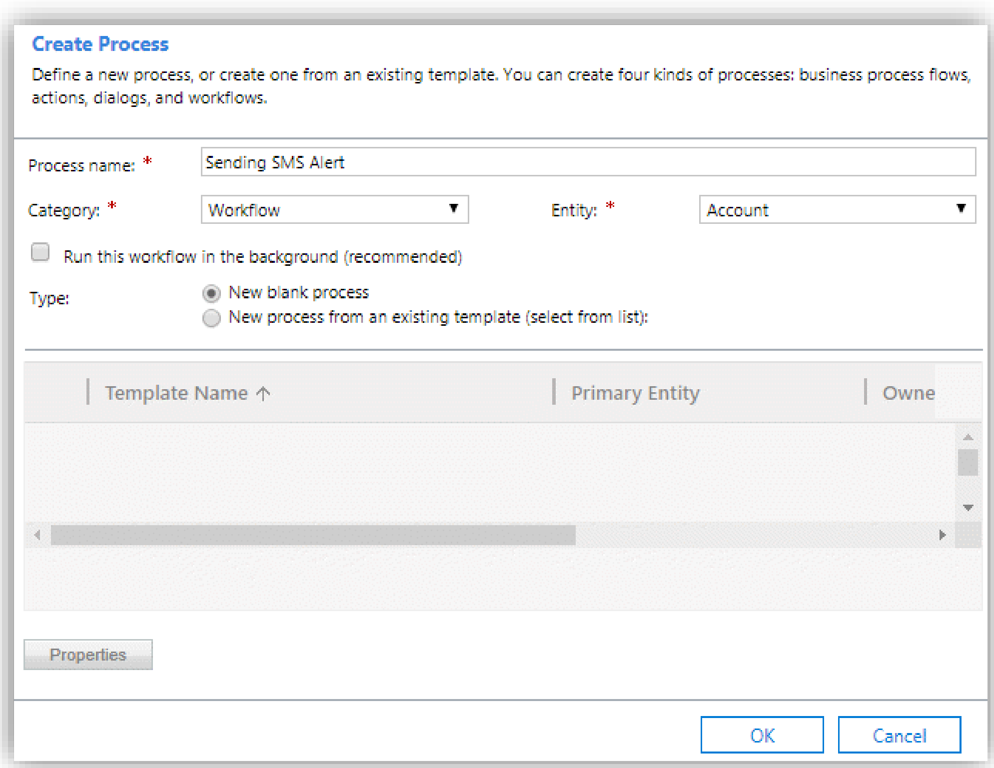


- On selecting Change Status, you need to select the entity for which status has to be changed. Select SMS Message in first dropdown and select status Pending Sent in the second dropdown.
- Changing status of the SMS Message to Pending Sent will send the message.
- Once you are done with the configurations, you need to Save and Activate the process.
- All SMS created and sent from the CRM are easily accessible under Activities -> SMS

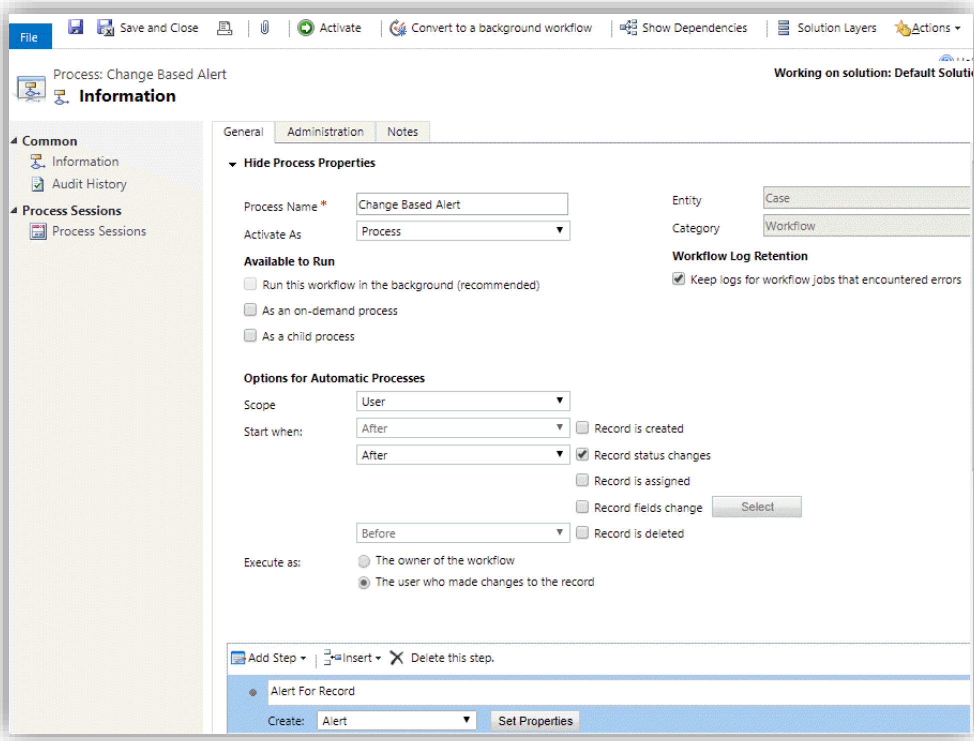


Send Alerts via process

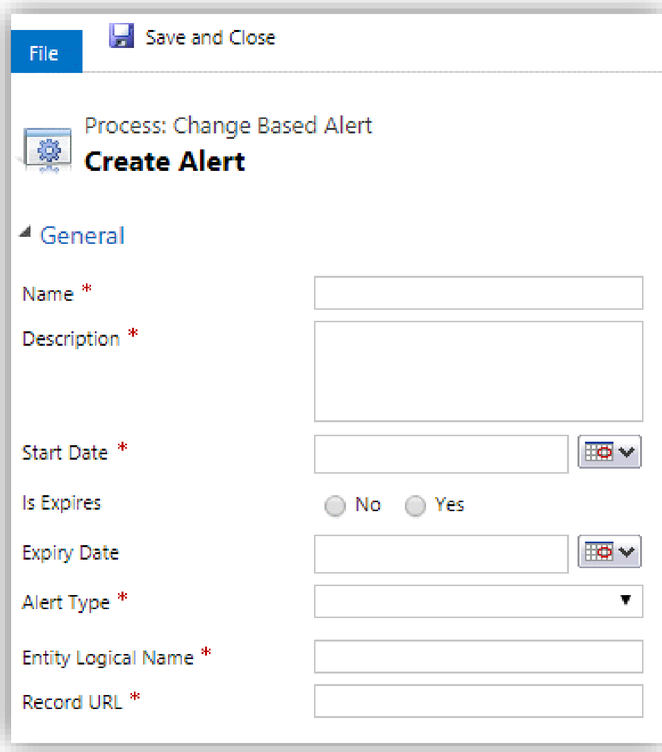
- To send alerts using workflow, you need to follow default CRM flow for creating workflows.
- Navigate to Settings > Processes
- Select New to create a new process. Enter valid process name, entity for which the process is being created and select Workflow as the Category.



- Click on Ok to proceed further.
- Here you may select the action as required for workflow to work.
- For alert to be sent, you need to create an alert record.



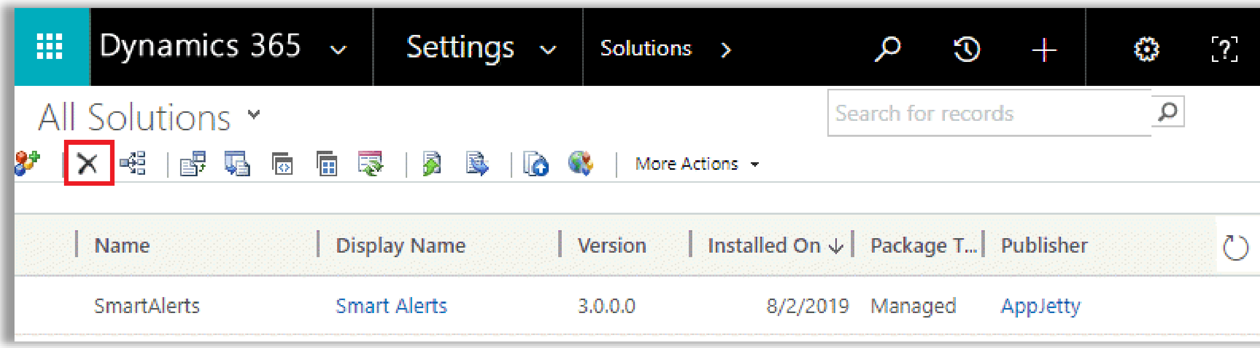
- For creating alert record, you need to select Alert from the option and you need to set properties as required.



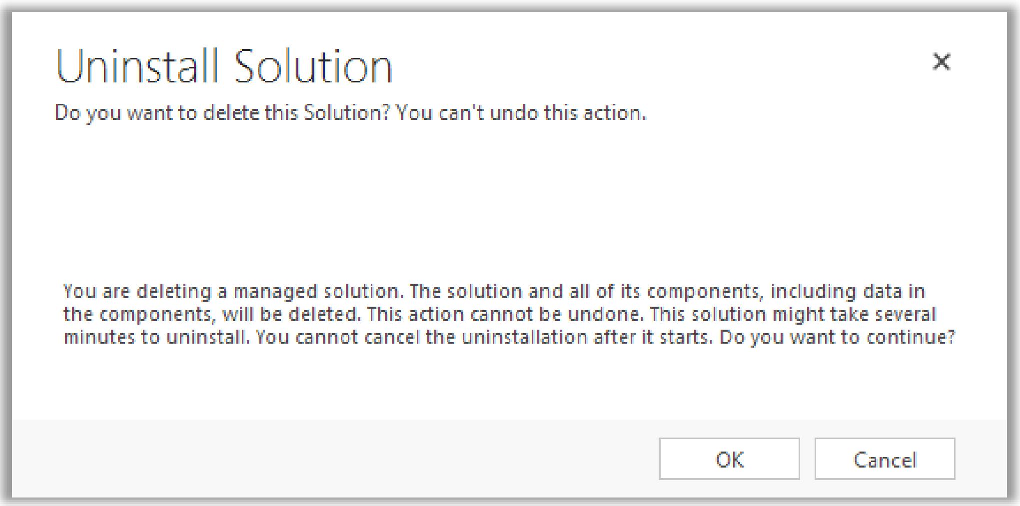
- Under set properties, you need to enter the relevant information or fetch it from dynamic values. Here using the logical name of entity is mandatory.
- For Example: Logical name of case is incident. So that is to be used.
- Once you are done with the configurations, you need to Save and Activate the process.

Un-installation Steps

- To uninstall the Solution, navigate to **Settings - > Solutions**.
- Check on the Plugin Name and click on **'Delete'**.



- Click on **'OK'** to Delete and uninstall the solution from CRM.



Contact Us

We simplify your business, offer unique business solution in digital web and IT landscapes.

Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: https://www.appjetty.com/dynamicscrm-smart-alerts.htm and click on the Live Chat button for instant support.

Tickets

- Raise tickets for your specific question!
- Send an email to support@appjetty.com or you can login to your account @ www.appjetty.com and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

Customization:
If you would like to customize or discuss about additional features for **Dynamics CRM Smart Alerts**, please write to sales@appjetty.com