

Microsoft Dynamics CRM 2013/2015/2016

Xrm.Notification AddOn

User Manual



Overview

Xrm.Notification addon provides a way for users to set up automatic notifications. Users can specify different messages that will be appearing on load of any entity record.

The solution allows for different levels of notifications and is using a built-in way of displaying those on a form.

The conditions under which the record for will show the notification are configured by the means of a selected view.

Xrm.Notification will notify on any entity and allow for multiple notifications on one entity record.



Configuring Xrm.Notification

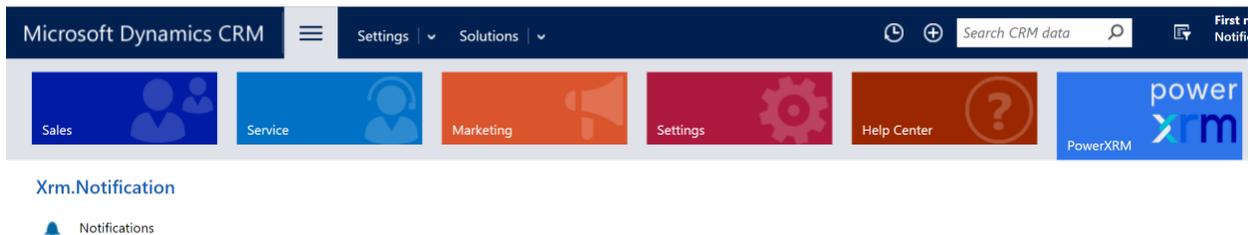
Before using Xrm.Location addon one must configure the solution on the solution configuration page. When first importing the solution we can see a simple login form.

The screenshot displays the configuration interface for the 'Solution Xrm.Notification'. On the left, a sidebar lists various configuration categories: Information, Configuration, Components, Entities, Option Sets, Client Extensions, Web Resources, Processes, Plug-in Assemblies, Sdk Message Processing S..., Service Endpoints, Dashboards, Reports, Connection Roles, Article Templates, Contract Templates, Email Templates, Mail Merge Templates, Security Roles, Field Security Profiles, Routing Rule Sets, Record Creation and Upda..., and SLAs. The main content area features the 'power xrm' logo at the top, followed by the heading 'Power XRM user name and password'. Below this, there are two input fields: 'User:' with the value 'edinm' and 'Password:' with masked characters. A blue 'Validate Licence' button is positioned below the password field. At the bottom of the form, a green checkmark and the text 'Licence Validated' are displayed.

These credentials come from an account previously created at powerxrm.com. The Validate License button checks if the entered credentials are valid and in case of a success prints the validation message showing the remaining two configuration tabs afterwards. If the validation failed the appropriate error message will be shown together with the link to the powerxrm portal where an account can be created.

Using Xrm.Notification

After configuring the solution, we can create our first notification and configure it to show on our desired entity form. Import of the solution will add a new PowerXRM sitemap item.



We access the notification form by clicking on Notifications item in the sitemap. This will bring up a form with all the configuration in it.

We have to specify a couple of things on a notification form:

NOTIFICATION : INFORMATION

test

General

Name *	test
Owner *	 First name Last name
	Contact <input type="text" value="Contact"/> All Members <input type="text" value="All Members"/>
Notification Message *	Test information for all members
Level	INFORMATION
Clear Notification	Yes
Clear Timeout (seconds)	10

- Entity: Entity for which the notification will appear
- View: Filter based on which the notification appears for the selected entity
- Notification Message: The text which appears
- Level: These are the supported notification levels defined by Dynamics (Information, Error, Warning)

- Clear Notification: If set to Yes we have to enter clear timeout. This means that we want the notification to disappear in certain period of time

If everything was done correctly we can then go on a contact form and see if the notification appears as it is supposed to.



Test information for all members

Summary

CONTACT INFORMATION

Full Name *	edin milic
Job Title	--
Account Name	--
Email	--
Business Phone	--
Mobile Phone	--
Fax	--
Preferred Method of C	Any
Address	--

POSTS ACTIVITIES NOTES

Enter post here

Both Auto posts User posts

 **edin milic**
Contact: Created By [First name Last name.](#)
On [edin milic's wall](#)
Yesterday