**NuSoft Alert**

Version 8

**User Guide**

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# **Introduction**

This document is designed as an introductory guide for Microsoft Dynamics CRM users to learn the basics of using NuSoft Alert.

NuSoft Alert is a handy tool that allows the users to add a custom alert to Accounts, Contacts, Leads and Opportunities.

 Features:

* Display custom note/alert on the top of a record (Accounts, Contacts, Leads or Opportunities) up to 200 characters.
* Ability to copy note/alert from an Account record to related Contacts with workflow.

# **Using NuSoft Alert**

## Creating New Alerts

1. To add an alert message to a Lead, Account, Contact, or Opportunity record navigate to **Sales,** then any one of the preceding entities. For this example we used **Accounts**.





1. Open a record from the previous entities and write your note in the Alert Note field. When you click out of the field the Alert is created.



After clicking out of the Alert Note field, the current date is also saved to the Alert Note Date field, and is then displayed in the alert bar before your Alert Note text.



## Copying Alerts from Company to Related Contacts

If a company record has an alert, the alert can be copied to any related contact from the contact entity.

1. Navigate to **Sales -> Contacts**





1. Select Contact you wish to copy alert to, from parent company. Then select **Run Workflow.**



1. Select **Add Alert From Company to Contact** and click **Add** then **Ok.**





1. After running the workflow the Alert Note field will be populated from the Account and the contact will show the same alert.





This workflow can be run from individual records as well. Open up the contact record and follow the same procedure of selecting the **ellipses** clicking on **Run Workflow** and then selecting the **Add Alert from Company to Contact.** Then click **Add,** and then **Ok.** Now wait approximately 30 seconds and refresh the Contact record. Upon refresh, the Alert Note field will be populated with the data from the company and the alert will be shown.

**Note:** If the contact has an alert already, it will be overwritten by the related Company alert.

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