**NuSoft Alert**
Version 8

**Installation and Configuration Guide**

Table of Contents

[Introduction 3](#_Toc497378060)

[Requirements/Compatibility 3](#_Toc497378061)

[Installing Atrio Alert 3](#_Toc497378062)

[Backing up Entities 3](#_Toc497378063)

[Installing Atrio Alert 9](#_Toc497378064)

[Reimporting Entities 12](#_Toc497378065)

[Support 12](#_Toc497378066)

[Disclaimer 12](#_Toc497378067)

# **Introduction**

This document is designed as a guide for Microsoft Dynamics CRM users to install NuSoft Alert. It includes step by step instructions on how to complete the installation of NuSoft Alert.

NuSoft Alert is a handy tool that allows the users to add 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 Account record to related Contacts with workflow.

# **Requirements/Compatibility**

NuSoft Alert is compatible with CRM 2016.

The following brwosers are supported:

* Internet Explorer 10+
* Google Chrome 43+
* Safari 8.0.5+
* Firefox 38.0.5+

NuSoft Alert may work on previous browser versions, the mentioned versions have been tested and are known to work.

# **Installing NuSoft Alert**

## Backing up Entities

Importing the NuSoft Alert solution can cause changes to be made to the following entities forms if they have been customized: Accounts, Contacts, Leads, and Opportunities.

To prevent this from happening, the 4 entities should be backed up and re-imported after importing NuSoft Alert.

1. Navigate to **Settings -> Solutions** and create a new Solution.





1. Name the solution Backup, add values to all required fields and click **save**.



Select the “Default Publisher ” if you are working on a trial CRM platform.

1. After saving click **Entities** and then **Add Existing** and select **Accounts, Contacts, Leads and Opportunities** from the list. Click **Ok** and the Click **Next** until you get to the Solution backup screen where you can see **Accounts, Contacts, Leads and Opportunities** in the list.

Now select each entity name and add the required components.





1. Click **Save and Close** and then select the Backup solution click **Export**





1. Click **Publish All Customizations** then click **Next**



1. Follow the wizard instructions and add any required components if required and ignore advanced settings.



1. Export as an **unmanaged** **solution** and your current CRM version



1. Click **Export** and a backup zip file would be downloaded.

## Installing NuSoft Alert

1. Navigate to **Settings -> Dynamics Marketplace**





1. Enter “NuSoft” in the search box and click on “**Get it now**” for **NUSOFT Alert.**



1. Check the box and click **Continue**



1. Agree to the conditions and click **Agree**



1. Come back to **Settings > Solutions > All Solutions** records page page after the installation has completed, **NUSOFTAlert** solution file should show up in the records.



## Reimporting Entities

If your CRM views or forms become modified after importing NuSoft Alert and publishing customizations, import your backup unmanaged solution created above in the “Backing Up Entities” section.

# **Support**

Free products are provided without support, but we value your feedback. Please send product issues and suggestions to support@nusoftsolutions.com. We will take your suggestions to make the product better.

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