NuSoft Alert Pro

Version 8.6.0.0

User Guide

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Introduction

This document is designed as an introductory guide for Microsoft Dynamics CRM users to learn how to use the NuSoft Alert Pro product.

NuSoft Alert Pro is a handy tool that allows the users to add a custom alert to Accounts and Contacts

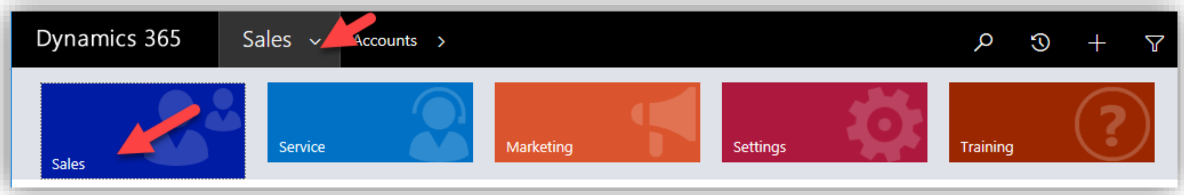
Features:

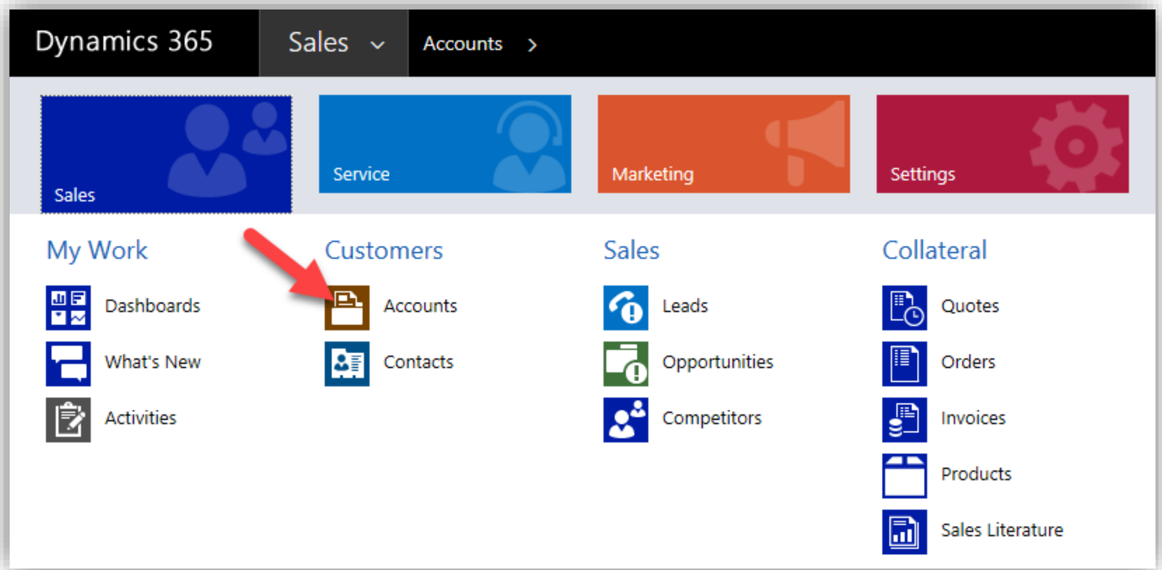
- Display multiple custom note/alert in a subgrid inside the form(Accounts, Contacts, Lead, and Opportunity) up to 500 characters.
- Different views and easy modification of alerts
- A colored escalation level for each alert
- An expiration date on the alerts to deactivate when they are no longer relevant

Using NuSoft Alert Pro

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 entites the Alert Pro table has been added (see the installation and configuration guide for instructions). For this example we used **Accounts**.





Dynamics 365
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Quotes
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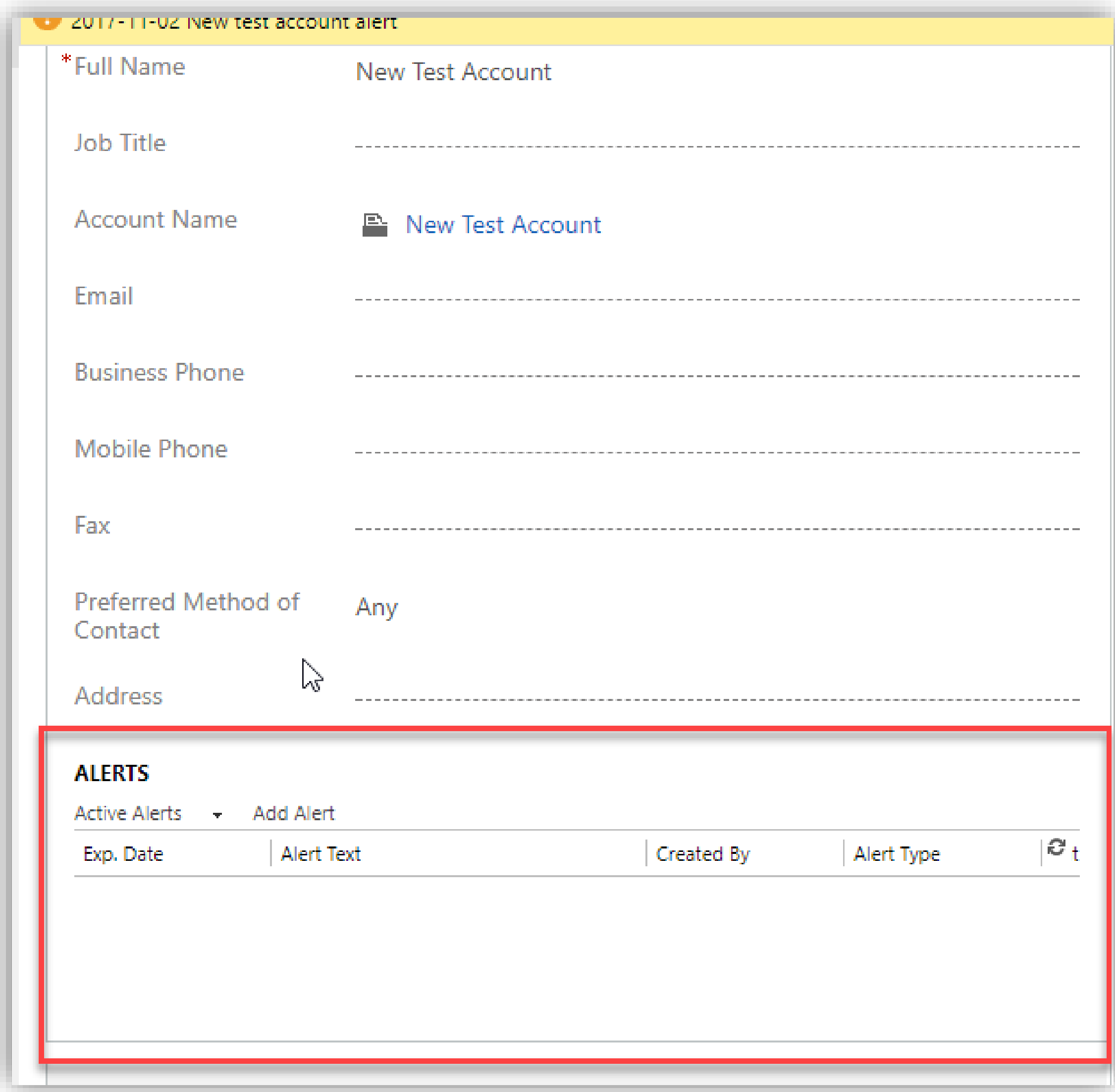
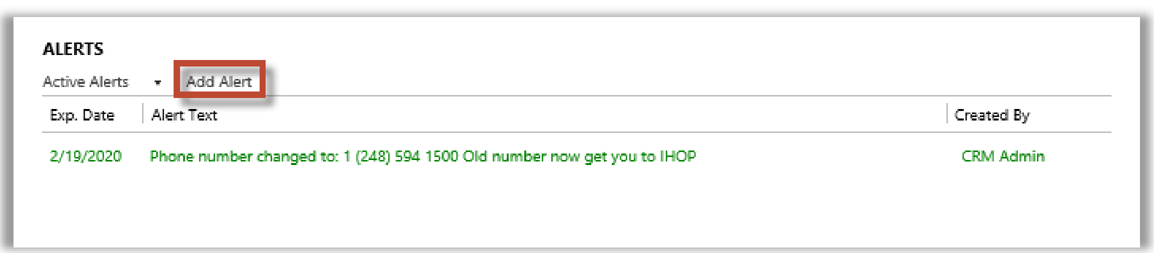
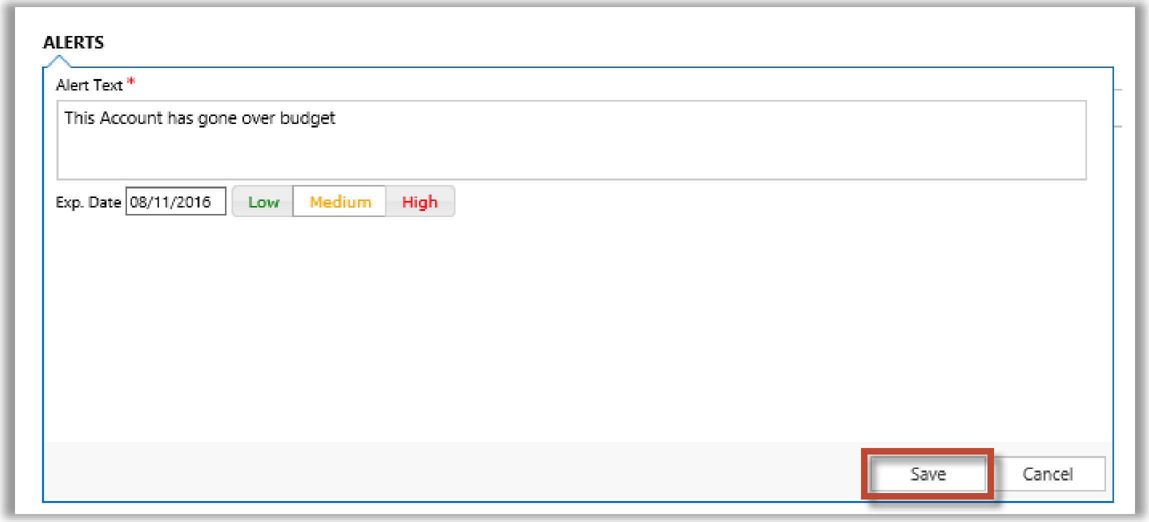
Invoices
Products
Sales Literature

2. Open the form of the desired entity that needs the alert. Under **ALERTS section**, select **Add Alert**.

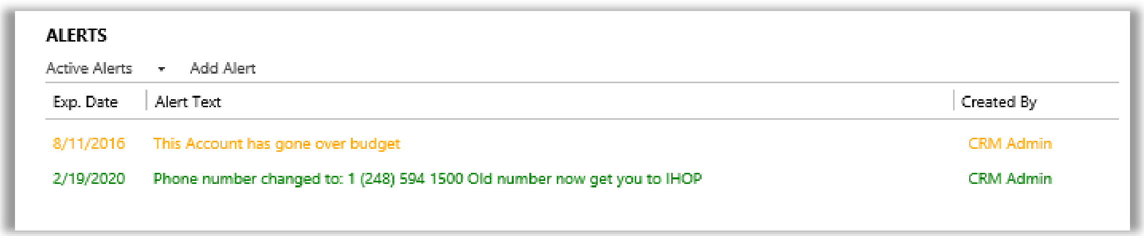




3. Enter the alert in the text box, select the date the alert will expire, and choose the priority level. Select **Save** when finished.

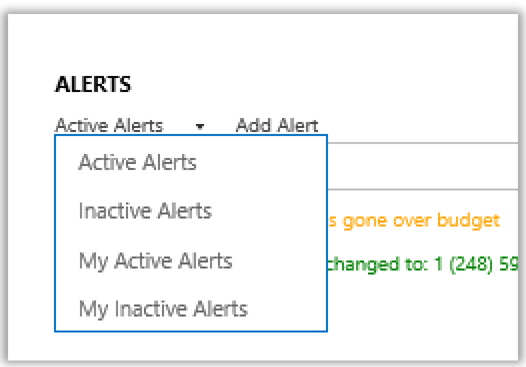


The alert will appear in the box. Alerts will become inactive after their expiration date.



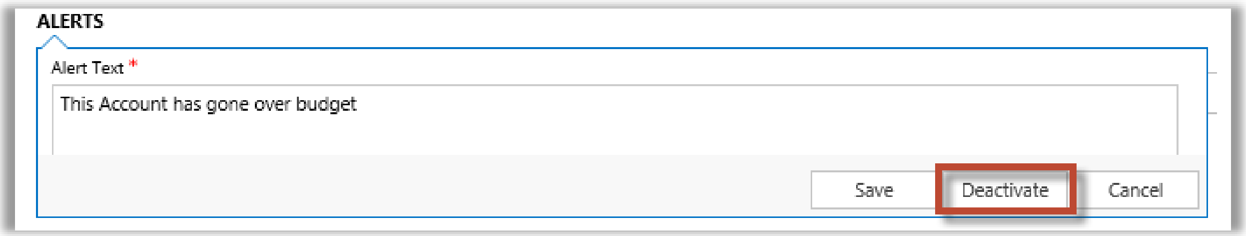
Filtering Alerts

Selecting the drop down menu below the current view will open a list of other views. Use these to filter your alerts.



Deactivating Alerts

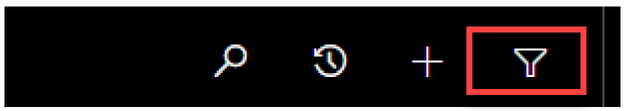
Double click on the alert you wish to remove, and click **Deactivate.**

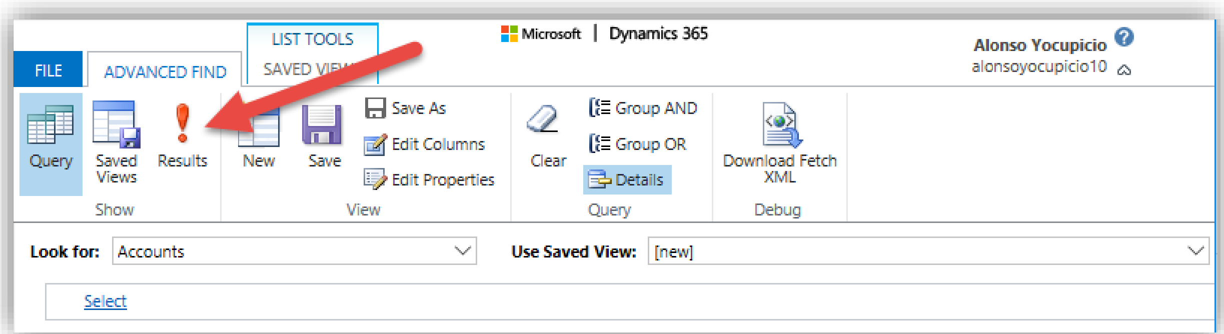


Bulk creation of New Alerts

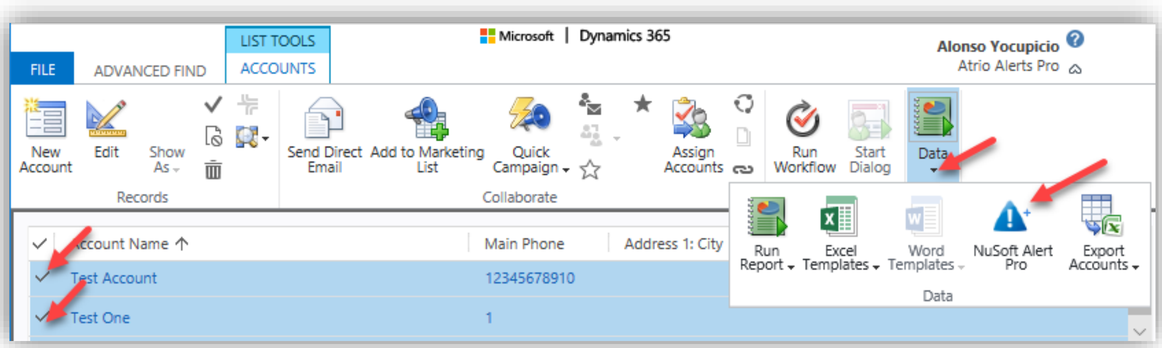
Bulk creation of alerts can be done on Accounts and Contact. For this example we used Accounts.

1. To add an alert message to multiple Account, navigate to **Advanced Find,** select Accounts then click execute results.

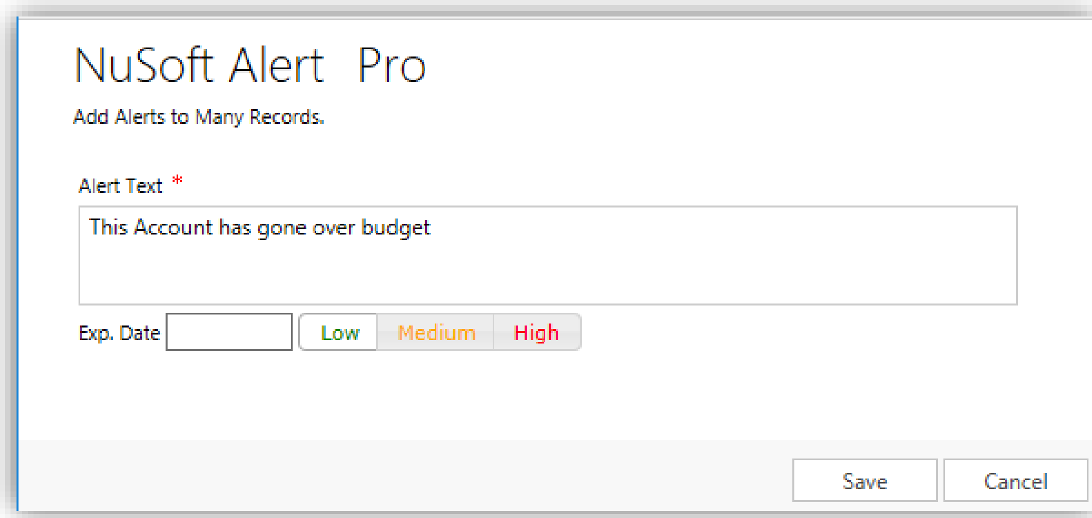




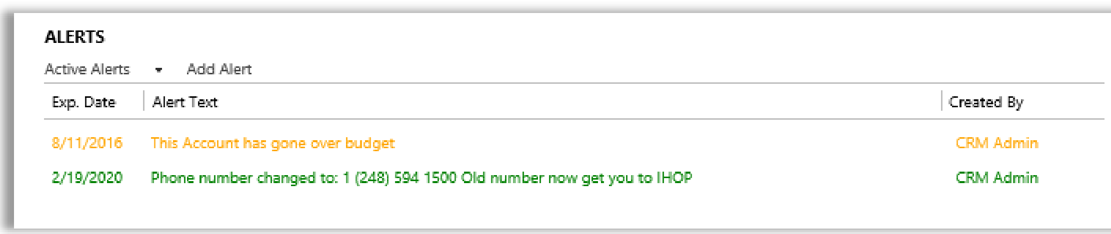
2. Select the desired entities that need the alert. Under data group buttons click **NuSoft Alert Pro**.



3. Enter the alert in the text box, select the date the alert will expire and choose the priority level. Select **Save** when finished.



4. Once closed the popup, open the account form of any of the selected accounts. The alert will appear in the box.



Support

Please send any product issues and suggestions to support@nusoftsolutions.com.

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