



# **NuSoft Alert Pro**

Version 8.6.0.0

## **User Guide**

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## Introduction

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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:

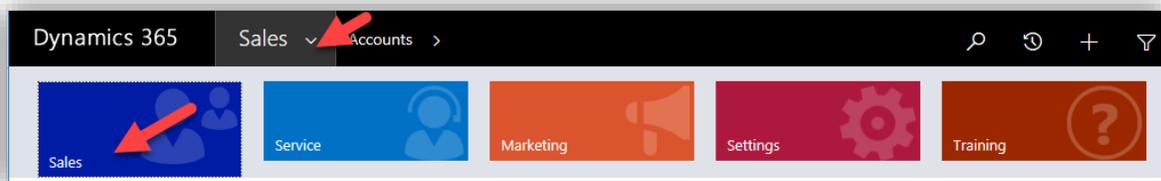
- Display multiple custom note/alert in a subgrid inside the form(Accounts, Contacts, Lead, and Opportunity) up to 500 characters.
- Different views and easy modification of alerts
- A colored escalation level for each alert
- An expiration date on the alerts to deactivate when they are no longer relevant

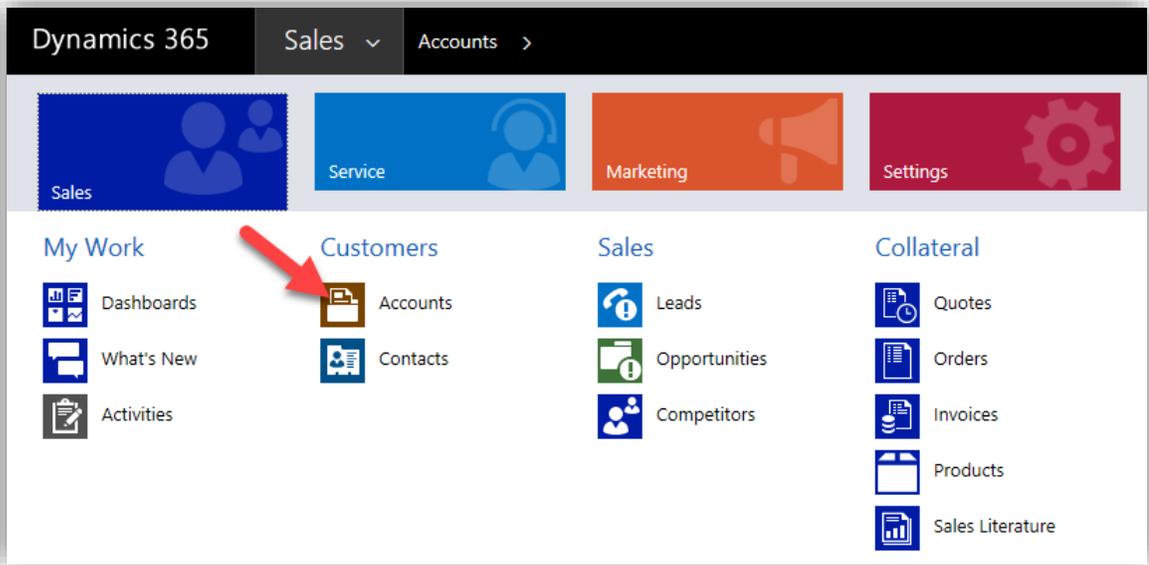
## Using NuSoft Alert Pro

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### 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**.





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

2017-11-02 New test account alert

\*Full Name New Test Account

Job Title -----

Account Name New Test Account

Email -----

Business Phone -----

Mobile Phone -----

Fax -----

Preferred Method of Contact Any

Address -----

**ALERTS**

Active Alerts ▾ Add Alert

| Exp. Date | Alert Text | Created By | Alert Type | t |
|-----------|------------|------------|------------|---|
|           |            |            |            |   |

**ALERTS**

Active Alerts ▾ Add Alert

| Exp. Date | Alert Text   | Created By |
|-----------|--|------------|
| 2/19/2020 | Phone number changed to: 1 (248) 594 1500 Old number now get you to IHOP | CRM Admin  |

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

**ALERTS**

Alert Text \*

This Account has gone over budget

Exp. Date 08/11/2016 Low Medium High

Save Cancel

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

**ALERTS**

Active Alerts ▾ Add Alert

| Exp. Date | Alert Text   | Created By |
|-----------|--|------------|
| 8/11/2016 | This Account has gone over budget  | CRM Admin  |
| 2/19/2020 | Phone number changed to: 1 (248) 594 1500 Old number now get you to IHOP | CRM Admin  |

### Filtering Alerts

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

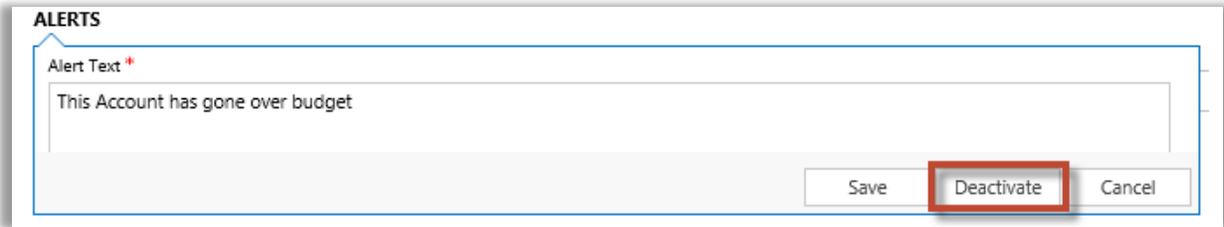
**ALERTS**

Active Alerts ▾ Add Alert

- Active Alerts
- Inactive Alerts
- My Active Alerts
- My Inactive Alerts

### Deactivating Alerts

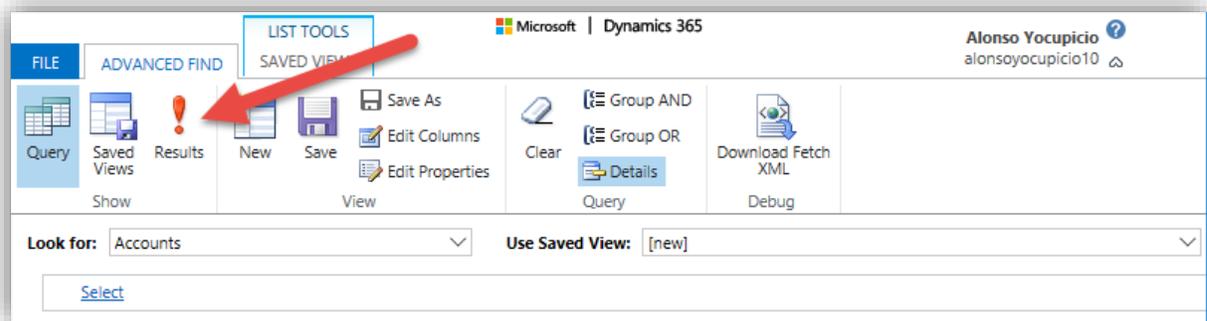
Double click on the alert you wish to remove, and click **Deactivate**.



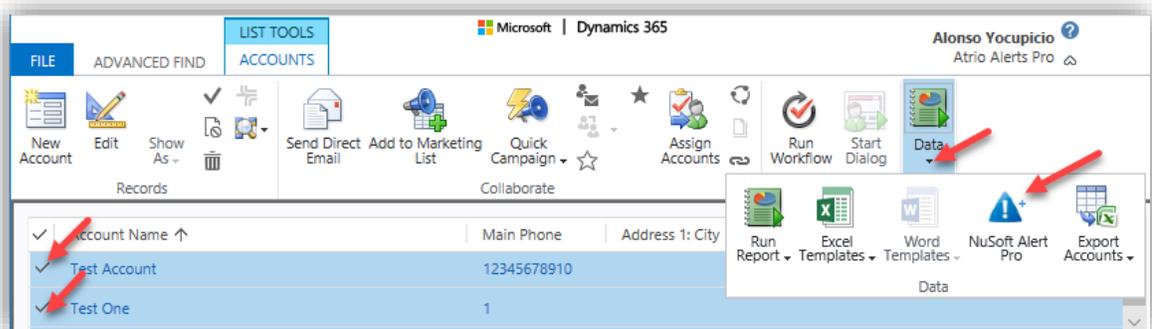
## Bulk creation of New Alerts

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

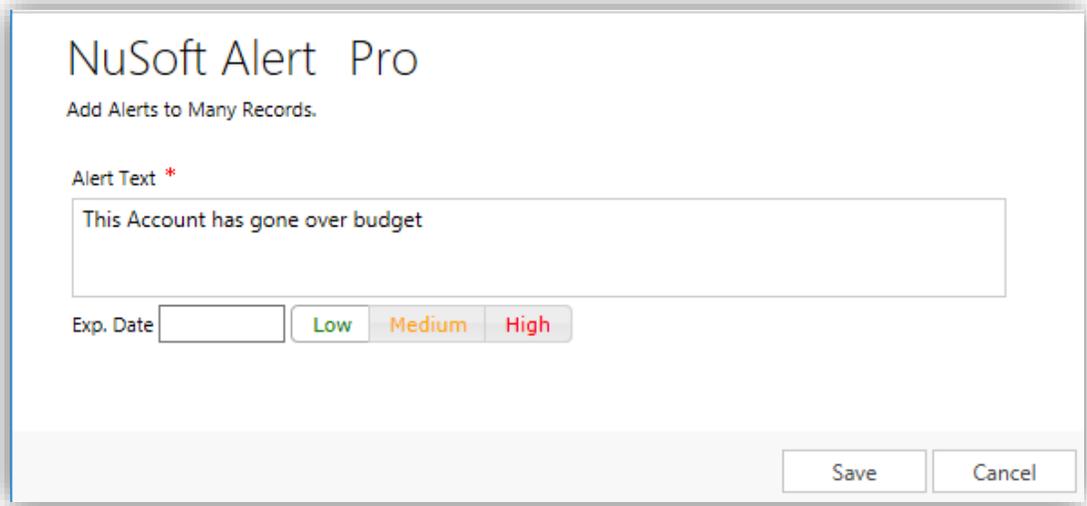
1. To add an alert message to multiple Account, navigate to **Advanced Find**, select Accounts then click execute results.



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

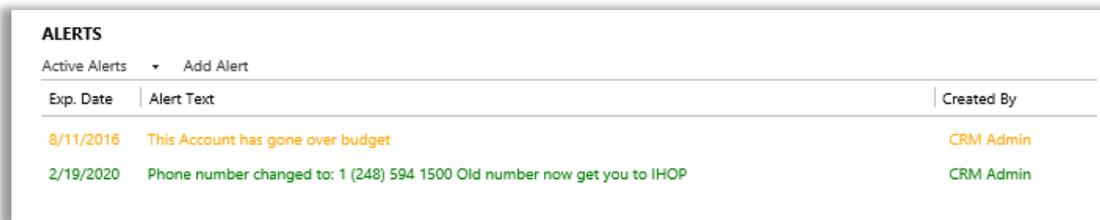


3. Enter the alert in the text box, select the date the alert will expire and choose the priority level. Select **Save** when finished.



The image shows a dialog box titled "NuSoft Alert Pro" with the subtitle "Add Alerts to Many Records." It contains a text input field for "Alert Text \*" with the value "This Account has gone over budget". Below it is an "Exp. Date" field and three radio buttons for "Low", "Medium", and "High" priority. At the bottom right are "Save" and "Cancel" buttons.

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



The image shows a table titled "ALERTS" with columns for "Exp. Date", "Alert Text", and "Created By". It lists two active alerts.

| Exp. Date | Alert Text   | Created By |
|-----------|--|------------|
| 8/11/2016 | This Account has gone over budget  | CRM Admin  |
| 2/19/2020 | Phone number changed to: 1 (248) 594 1500 Old number now get you to IHOP | CRM Admin  |

## Support

Please send any product issues and suggestions to [support@nusoftsolutions.com](mailto:support@nusoftsolutions.com).

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