

# **NuSoft Alert Pro**

Version 8.6.0.0

## **Installation and Configuration 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 install and configure NuSoft Alert Pro.

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

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

## Requirements/Compatibility

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NuSoft Alert Pro is compatible with CRM 2016.

The following browsers are supported:

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

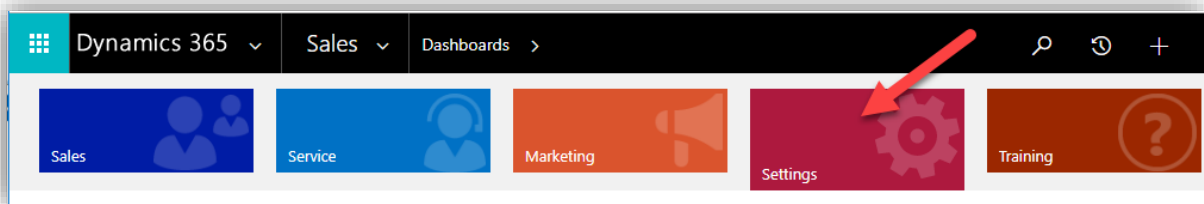
NuSoft Alert Pro may work on previous browser versions, the mentioned versions have been tested and are known to work.

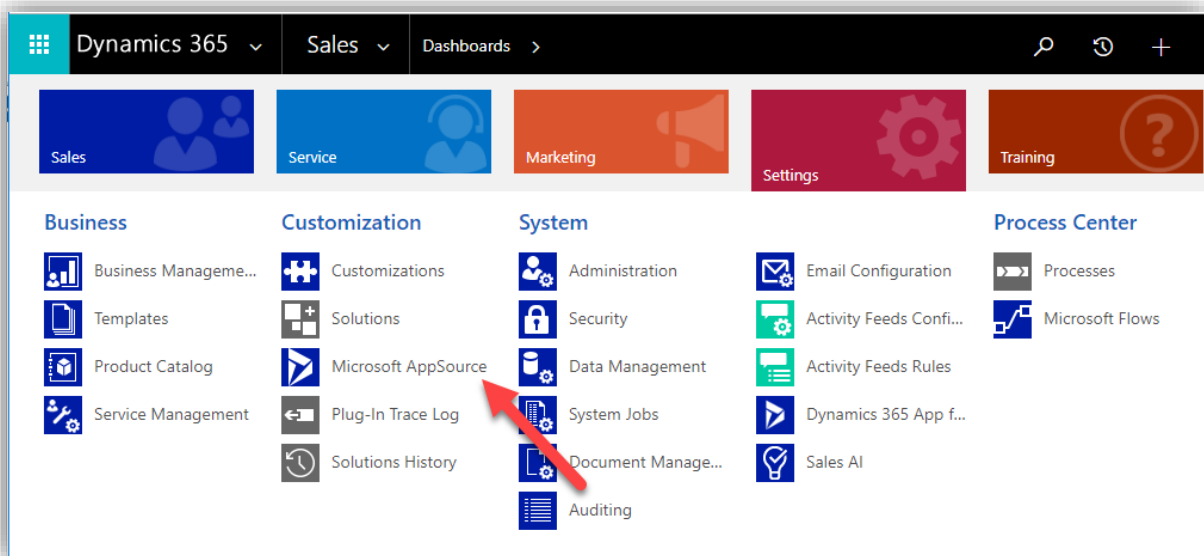
## Installing NuSoft Alert Pro

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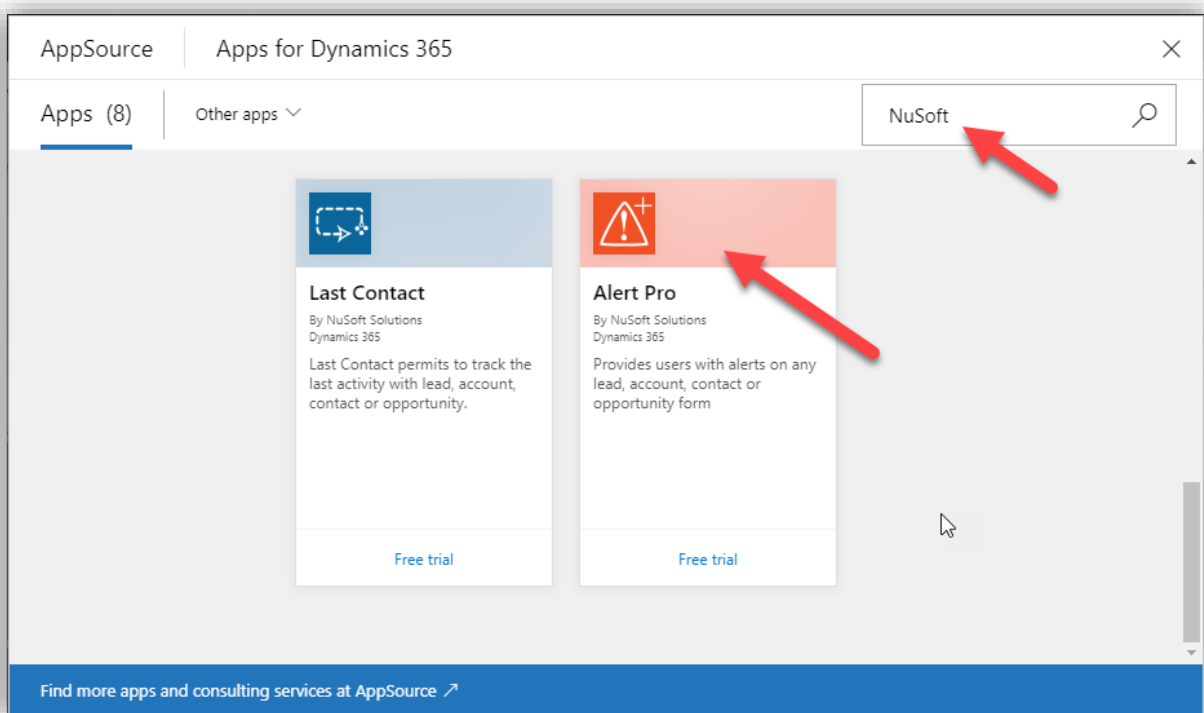
### Installing NuSoft Alert Pro

1. Navigate to **Settings -> Microsoft AppSource**

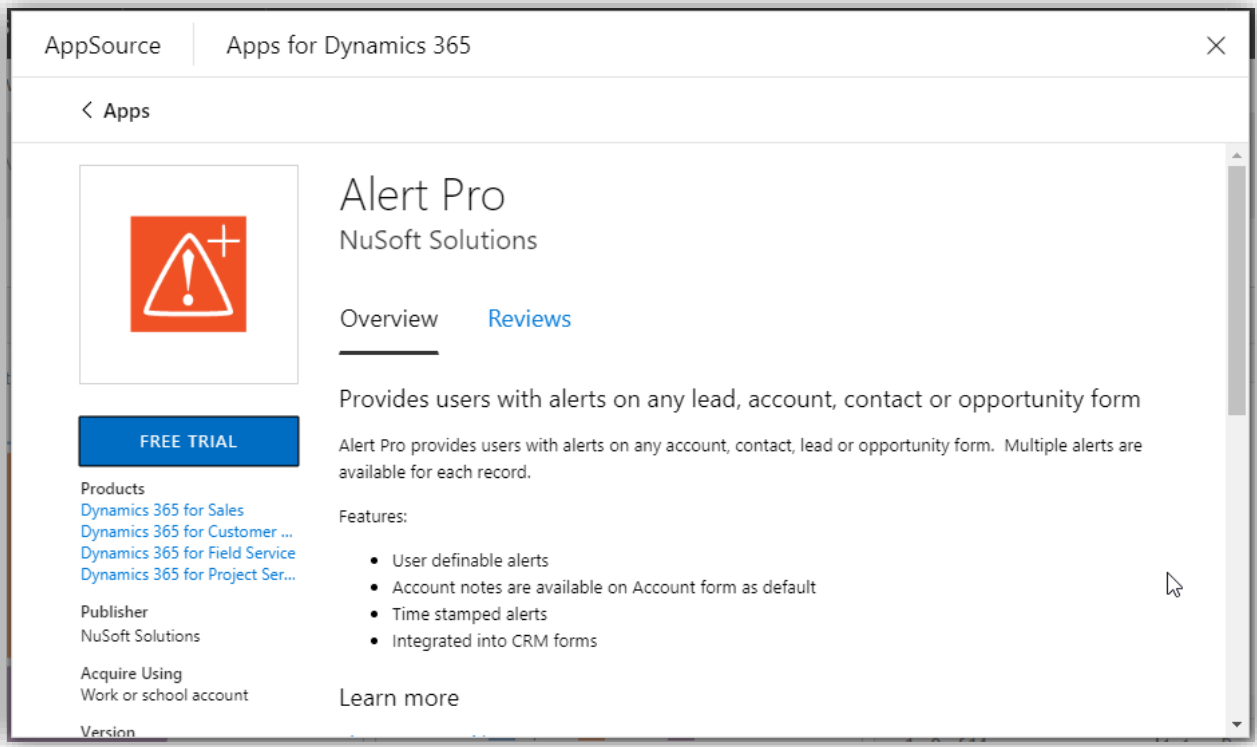




2. Enter **“NuSoft”** in the search box and click on **“Get it Now”** for **NuSoft Alert Pro**.




3. Check the box and click **Free Trial**. A popup will prompt for your contact information. Enter your data and click continue.



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

Atrio Systems



**ATRIO Alert Pro**

Atrio Alert provides users with alerts on any lead, account, contact or opportunity form. Individual alerts are available for each record.

Features:

- User definable alerts
- Account notes are available on contacts
- Time stamped alerts
- Copy account alerts
- Integrated into CRM forms

Publisher: Atrio Systems

Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365

Organization to add the application to: ankur (org4d9e0b99)

☒ Agree to Microsoft's [Legal Terms](#) and [Privacy Statement](#)











☒ Agree to [Privacy Statement](#) and [Legal Terms](#) for importing solutions into Dynamics 365

Agree

Cancel

- Come back to **Settings > Solutions > All Solutions** records page after the installation has completed, **NuSoft Alert Pro** solution file should show up in the records.

All Solutions ▾

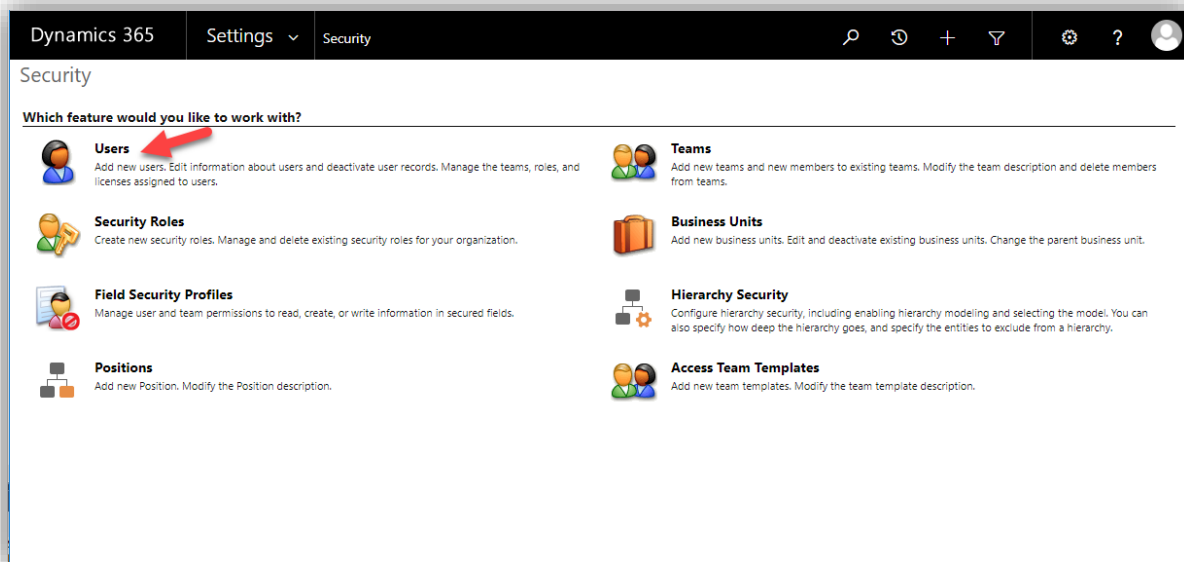
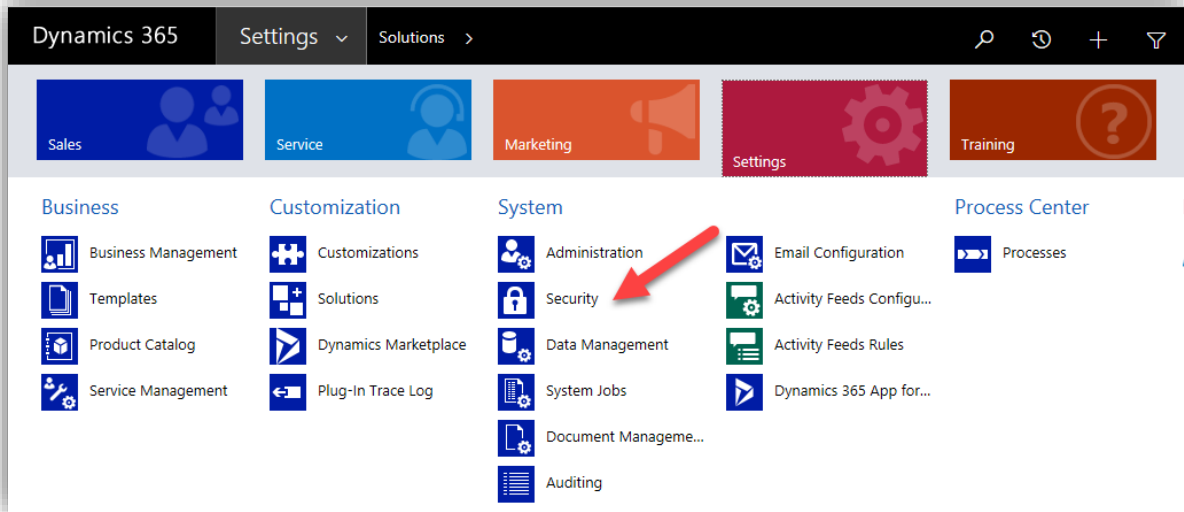
More Actions ▾

	Name	Display Name	Version	Installed On ▾	Package T...	Publisher	Description
<input checked="" type="checkbox"/>	AtrioAlertsPro	NuSoft Alert Pro	8.6.0.0	3/8/2019	Managed	NuSoft Solutions	

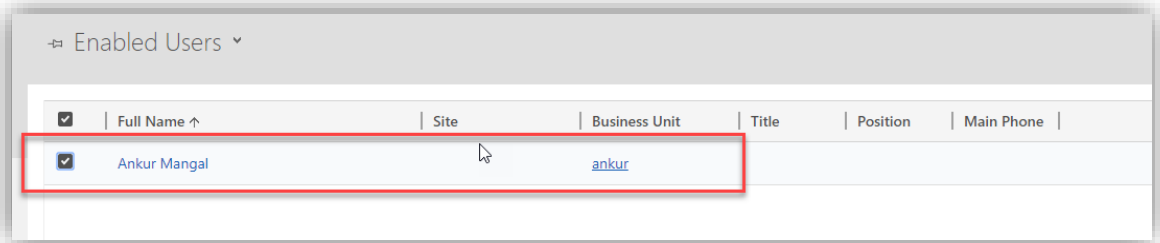
# Assign User Roles

Anyone who needs to see NuSoft Alert pro needs the **NuSoft Alert Pro** security role.

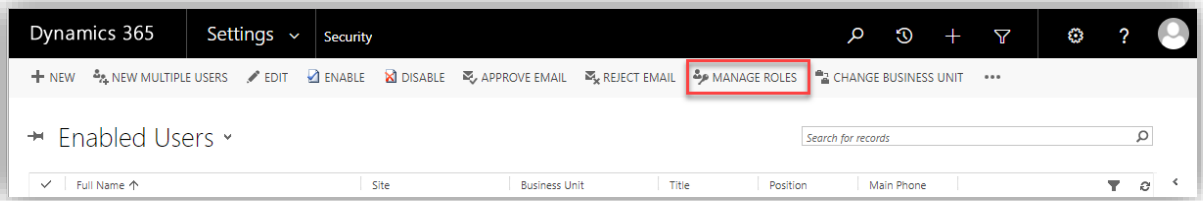
1. Navigate to **Settings->Security->Users**.



2. Select the users whom you wish to use NuSoft Alert Pro.



3. Select **Manage Roles** in the ribbon.



4. Choose the **NuSoft Alert Pro** role and select **OK**.

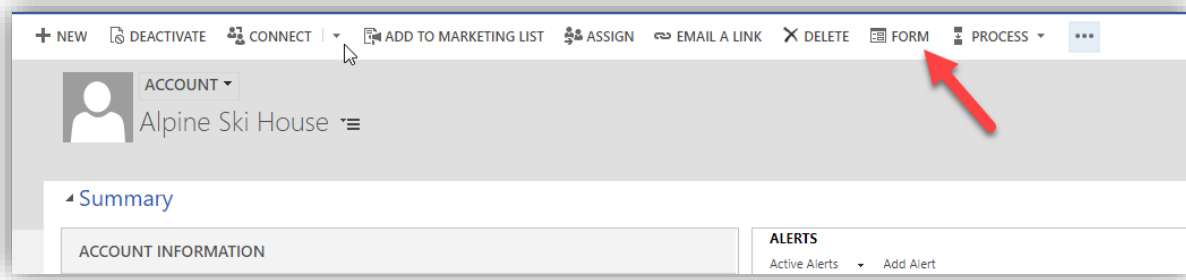


## Adding Alert Box to Forms

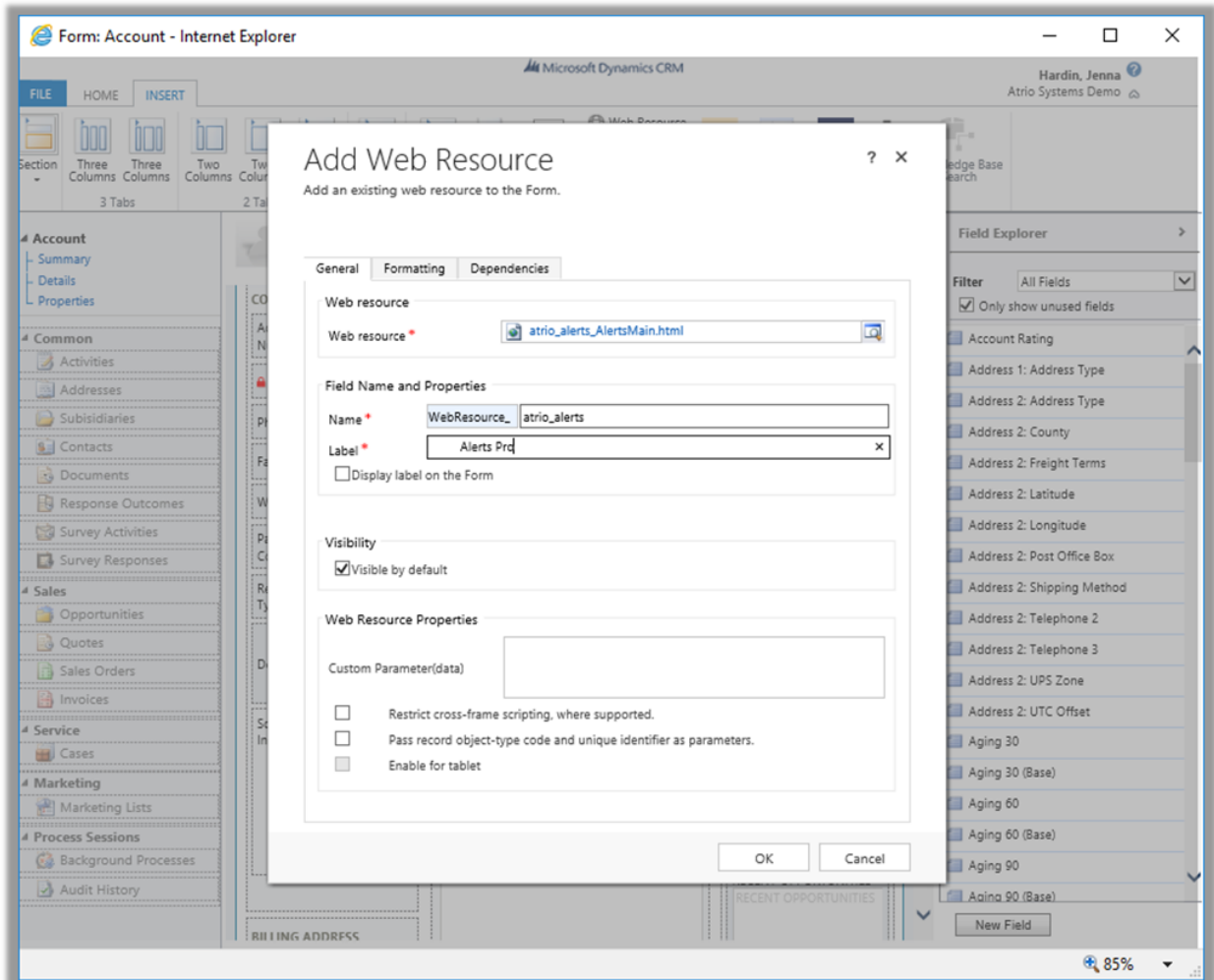
If you are a system customizer NuSoft Alert Pro will provide you with a web resource to display Alerts in the Account, Lead, Contact, or Opportunity form.

**Note : Web Resource is already added in the accounts entity**

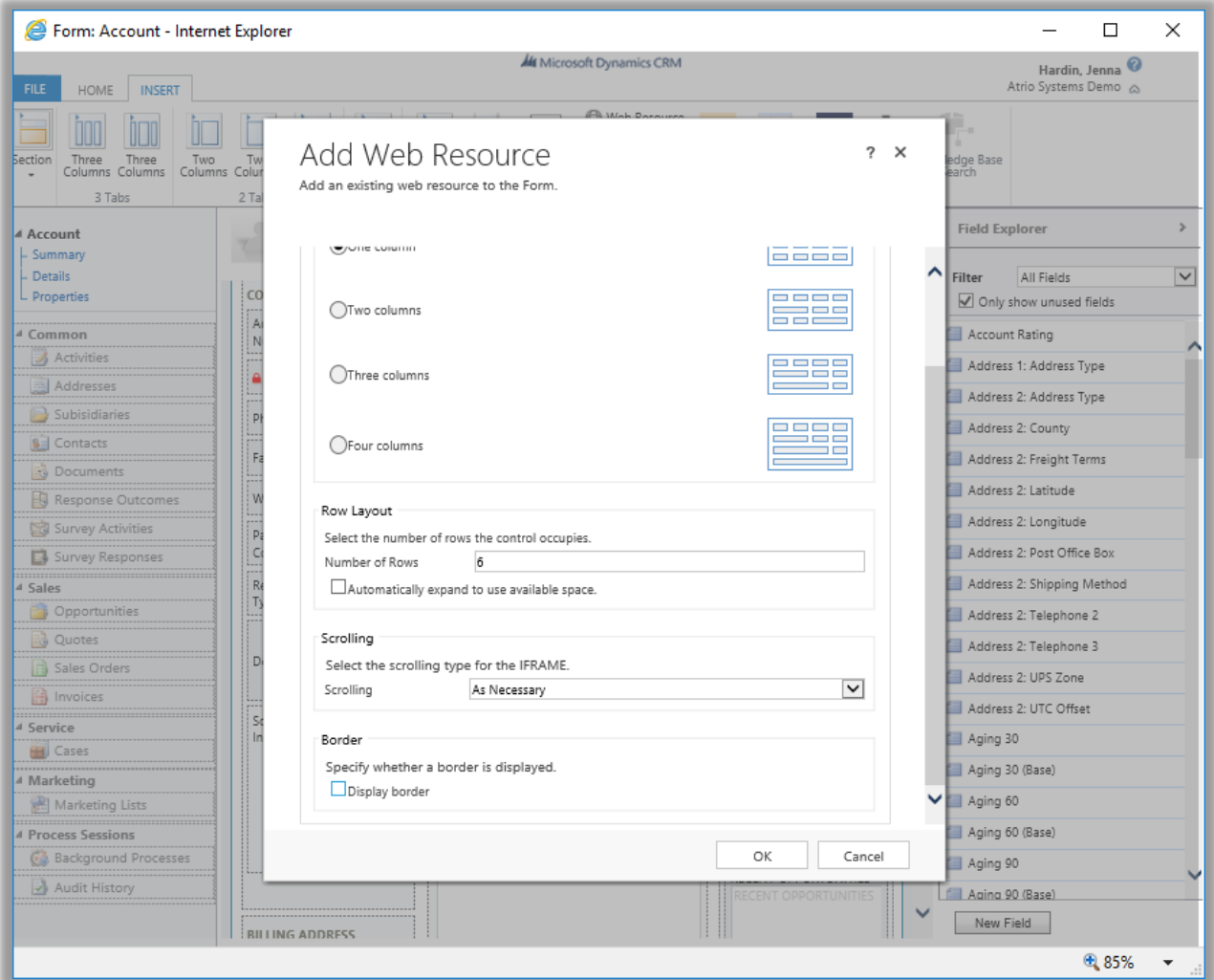
1. Go to **Sales -> Accounts**. Select any account to open the Account Form.
2. Click on **Form**.



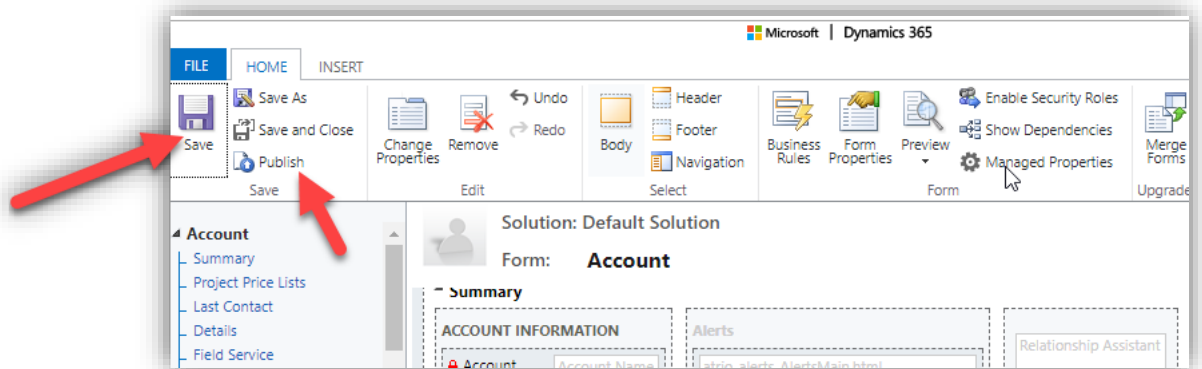
3. Go to **Insert -> Web Resource** component in the form and in the webresource name select the file `atrio_alerts_AlertsMain.html`.



4. Click in the **Formatting** tab and uncheck the "Display border"




5. Click **Ok** -> **Save** -> **Publish**.



6. Refresh the account page, and the web resource will be visible.

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
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7. After that Click on Add Alert.

**ALERTS**

Active Alerts ▾ Add Alert

Exp. Date	Alert Text	Created By	Alert Type	↻ t
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Write the alert text, select an expiration date and set the priority and click save.

The screenshot shows a form titled "ALERTS". It contains the following elements:

- Alert Text \***: A text input field containing the word "Test".
- Exp. Date**: A date picker showing "March 2019". The calendar grid has the 8th of March highlighted.
- Priority Buttons**: Three buttons labeled "Low", "Medium", and "High". The "Medium" button is highlighted with a red box.
- Action Buttons**: Two buttons at the bottom right, "Save" and "Cancel". The "Save" button is highlighted with a red box.

Now, you will be able to see the Alerts in the form and create, update or deactivate alerts for the current record in the form.

**ALERTS**

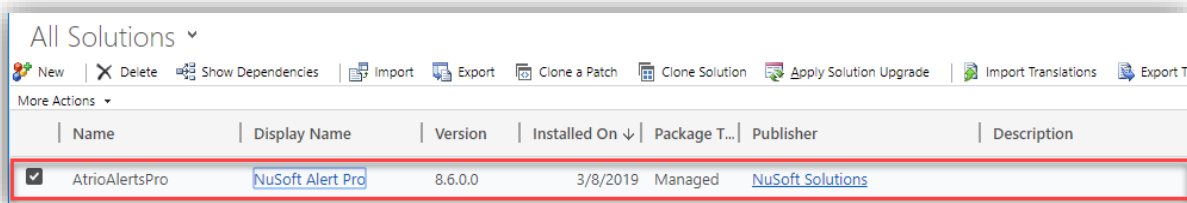
Active Alerts ▾ Add Alert

Exp. Date	Alert Text	Created By	Alert Type	
11/3/2017	Alert	Ankur Mangal	1 Low	cont

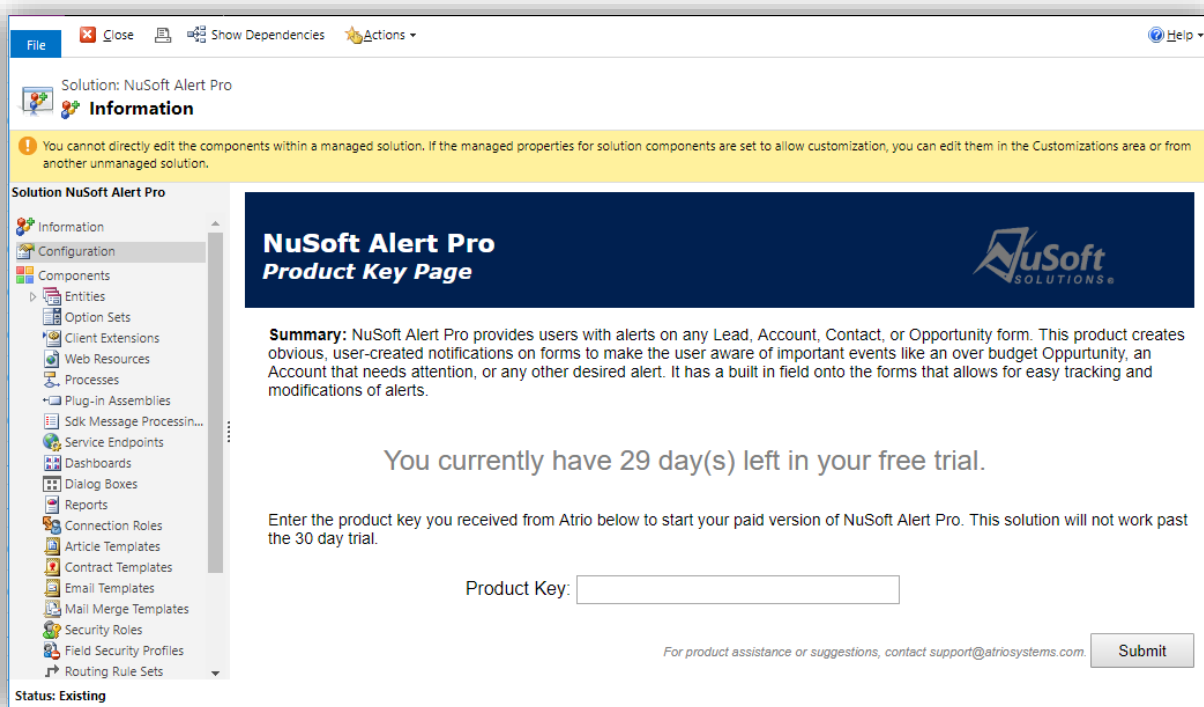
## Product Key

After 30 days of use, NuSoft Alert Pro will no longer work. To enter a purchased product key, follow the steps below.

1. Navigate to the **Solutions** page again and open up the **NuSoft Alert Pro** solution.



2. The **Configuration Page** will appear. Towards the bottom of the page will be a slot for the product key. Type in the product key you received from NuSoft and click **Submit**. If you do not have a product key, contact us at [support@nusoftsolutions.com](mailto:support@nusoftsolutions.com) to receive one.



## Support

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

## Disclaimer

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