

User Guide



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Solution Version: 2016365_062017_0_0



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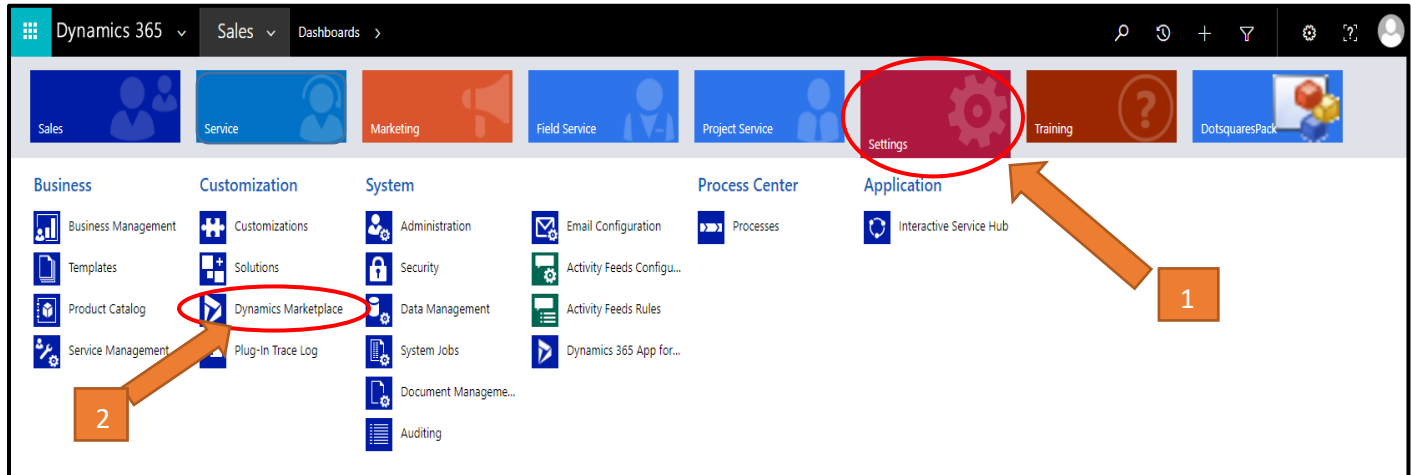
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How to Install Alerts in your Dynamics 365 CRM?

- To Install MTC' Alerts Solution, please follow the instructions given below.

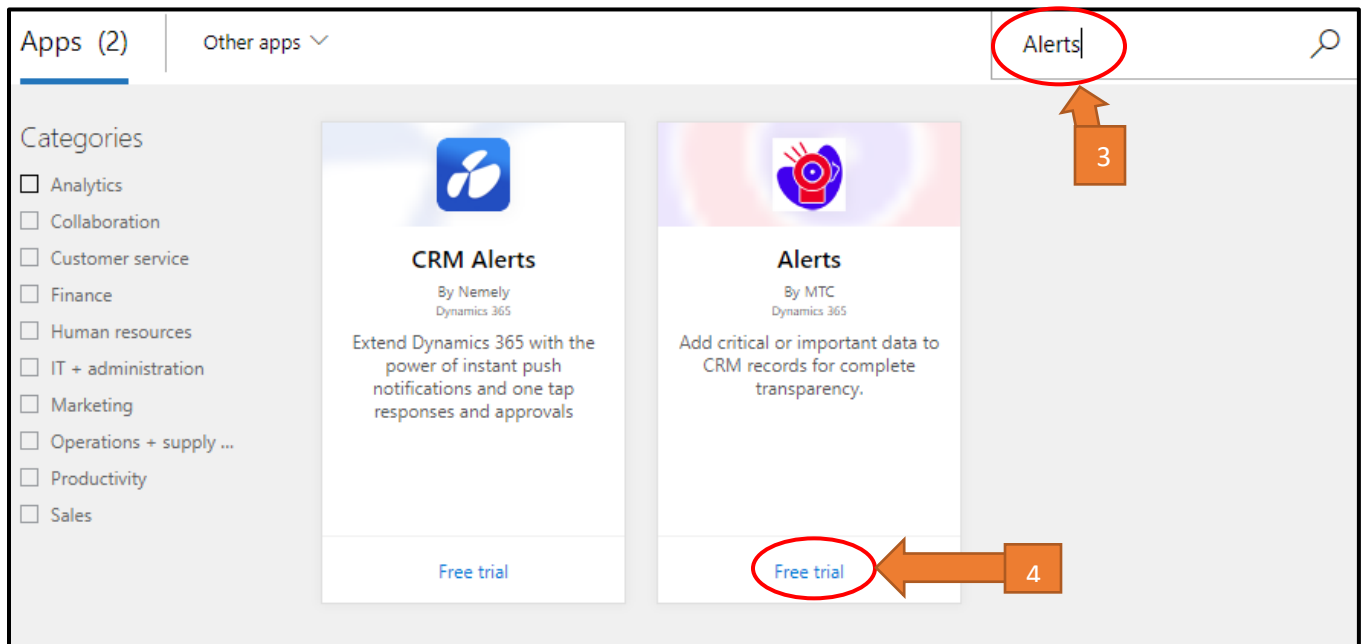
Step 1:

- Navigate to Dynamic 365 -> Settings and click on Dynamics Marketplace.



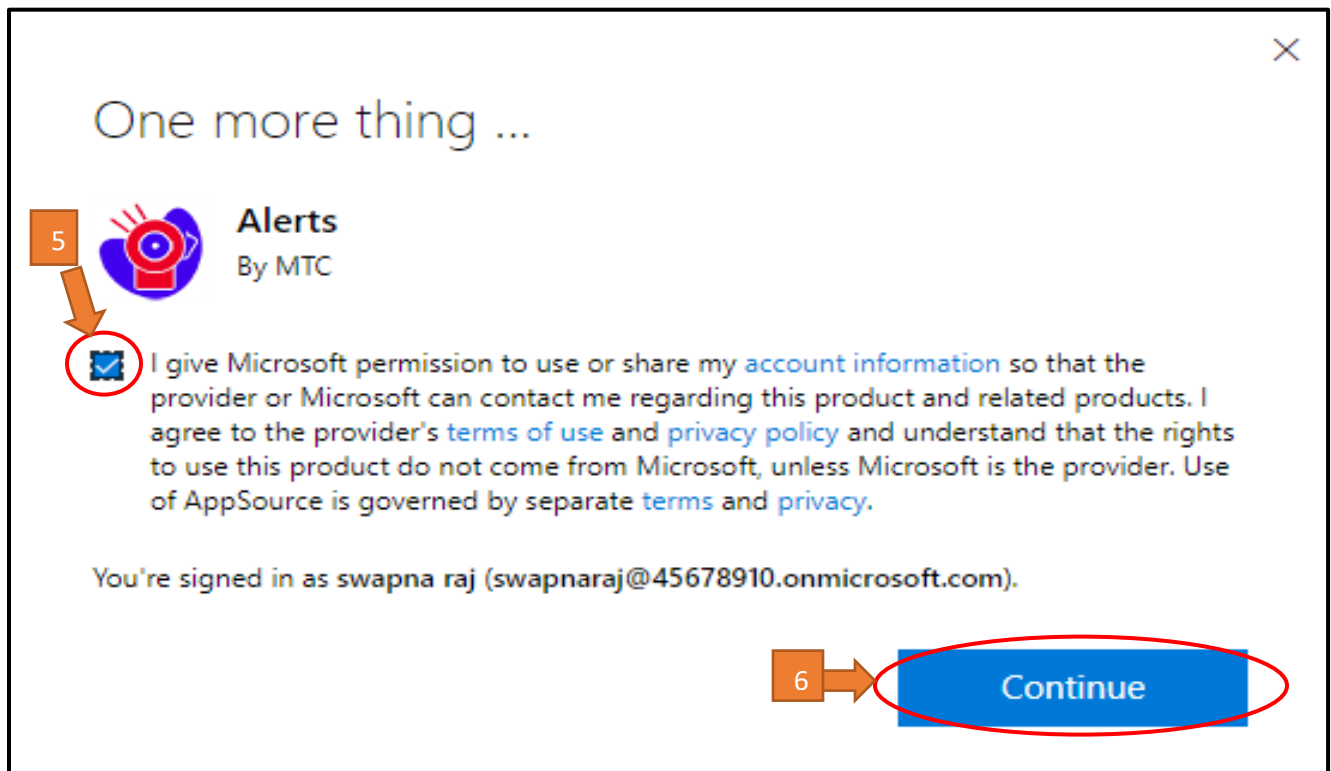
Step 2:

- In search box search for Alerts by MTC and click on free trial.



Step 3:

- Please tick the **Check Box** to give permissions and click on **Continue**.



Step 4:

- Please tick the two check boxes to agree **Microsoft Legal Terms and conditions** and agree to **Privacy Statement and Legal Terms** and click on **Agree** for importing the solution.

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: MTC (orge03d5402)

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

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

7

8

Agree

Cancel

Step 5:

- After clicking on agree the **Installation Process Begins**.

Select a preferred solution to manage on selected instance: mtc

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Activity Timer	365.52017.3.1	1/1/2050	Installed
Alerts	365.62017.3.3	1/1/2050	Installation pending
AttachmenttoSharepoint	365.62017.3.1	1/1/2050	Installed
Company News Timeline	1.0.1.0	12/31/2050	Installed
Crm Survey	20152016.12017.2.0	1/1/2050	Installed

Step 6:

- After completing the installation, you will notice that **licensing solution** also installed along with **Alert Solution**.
- To get the free trial Click on **licensing solution**.

Alerts	Alerts	365.062017....	8/18/2017	Managed	Management Technology Consulting
Licensing	Licensing	1.0.5.5	8/18/2017	Managed	Management Technology Consultanc..
ActivityTimer	Activity Timer	365.052017....	8/17/2017	Managed	Management Technology Consultanc...
dsautonumber	Dotsquares Auto Number ...	1.0	8/9/2017	Managed	Dotsquares Ltd.
MTC_AutoNumber	MTC AutoNumber	365.062017....	8/9/2017	Managed	Management Technology Consulting
MTC_MultipleFileAttachme...	MTC_MultipleFileAttachme...	1.0.0.0	8/8/2017	Managed	Management Technology Consultanc...
GroupCalendar	Group Calendar	365.062017....	8/8/2017	Managed	Management Technology Consulting

Step 7:

- Please fill up the **Account Information** and click on **submit**. “This will be a onetime activity.”

ACCOUNT INFORMATION

First Name*

Last Name*

Phone*

Company*

Website*

Email*

City*

State/Province*

Country*

Zip/Postal Code*

Submit

Step 8:

- After submitting the registration form, you can see all MTC products below and you can find **Alerts** as **Installed**.

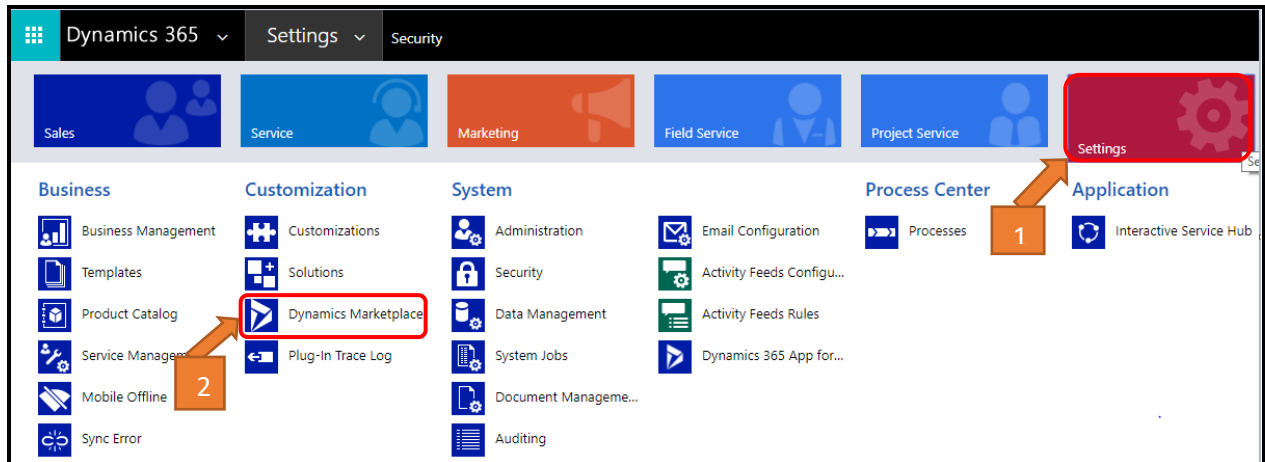
CRMStarterPack				Purchase As Bundle	Update License
	Activity Calendar			Get it Now	
	Alerts		Installed	Purchase License	Update License
	CRM Picture			Get it Now	
	Report To PDF			Get it Now	
	Auto Number		Installed	Purchase License	Update License
	Note Pro			Get it Now	

Security Roles for Alerts

Any user other than CRM Administrator must have Alerts security roles to access the solution. Only a CRM Administrator can administer these security roles using the below procedure.

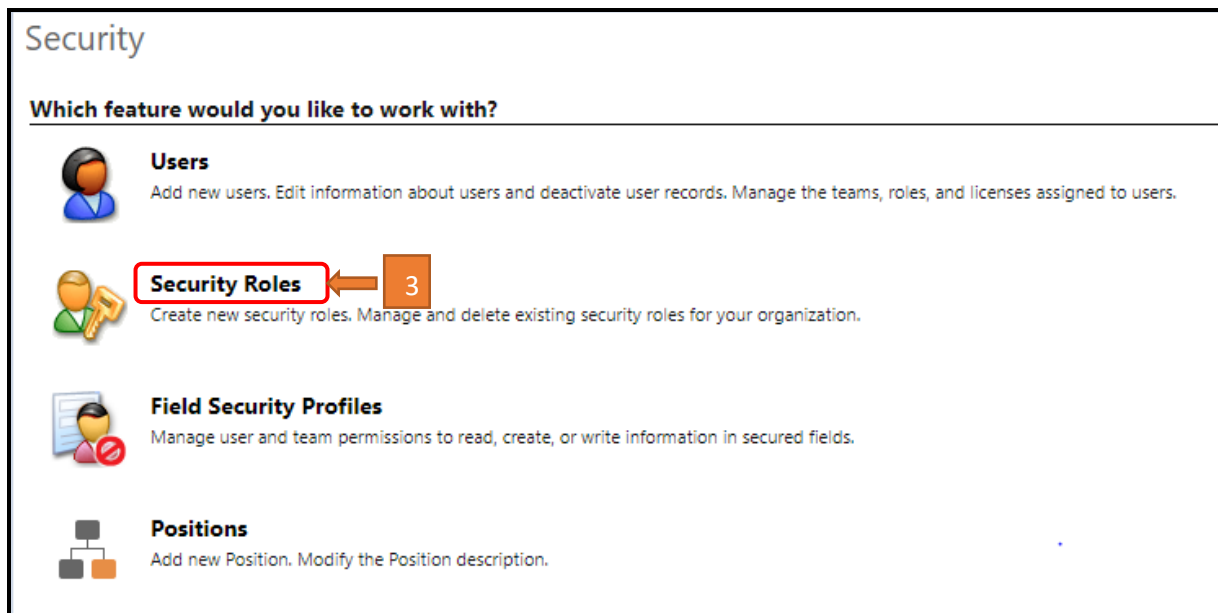
Step1:

- Navigate to **Dynamics Marketplace**, click on **settings** and **select security**.



Step2:

- Click on **Security Roles**.



Step3:

- Tick on MTC Alerts checkbox.

Account Manager	nasa17
Activity Feeds	nasa17
CEO-Business Manager	nasa17
CSR Manager	nasa17
Customer service app access	nasa17
Customer Service Representative	nasa17
Delegate	nasa17
Field Service - Administrator	nasa17
Field Service - App Access	nasa17
Field Service - Dispatcher	nasa17
Field Service - Inventory Purchase	nasa17
Field Service - Resource	nasa17
Knowledge Manager	nasa17
4 Marketing Manager	nasa17
Marketing Professional	nasa17
<input checked="" type="checkbox"/> MTC Alerts	nasa17
MTC Alerts Manager	nasa17

Step4:

- Click on **Custom Entities** and you can see the user has been given the permission of **Read** and **Write**.
- **Read** — Allows the user to view a record
- **Write** — Allows the user to edit a record

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share		
Account Project Price List	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Activity Timer Settings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Actual	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Actual Data Export (Deprecated)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Booking Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Booking Incident	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Booking Product	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Booking Service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Booking Service Task	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Booking Setup	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Invoice Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Invoice Product	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Invoice Setup	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Sub-Status	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Alert	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Alert Setting	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Batch Job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		

5

Step5:

- Tick the MTC Alerts Manager checkbox.

Account Manager	nasa17
Activity Feeds	nasa17
CEO-Business Manager	nasa17
CSR Manager	nasa17
Customer service app access	nasa17
Customer Service Representative	nasa17
Delegate	nasa17
Field Service - Administrator	nasa17
Field Service - App Access	nasa17
Field Service - Dispatcher	nasa17
Field Service - Inventory Purchase	nasa17
Field Service - Resource	nasa17
Knowledge Manager	nasa17
Marketing Manager	nasa17
Marketing Professional	nasa17
MTC Alerts	nasa17
<input checked="" type="checkbox"/> MTC Alerts Manager	nasa17
MTC License	nasa17

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Step6:

- Click on **Custom Entities** and you can see the user has been assigned the required permissions.


Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share		
Account Project Price List	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Activity Timer Settings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Actual	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Actual Data Export (Deprecated)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Booking Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Booking Incident	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Booking Product	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Booking Service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Booking Service Task	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Booking Setup	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Invoice Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Invoice Product	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Invoice Setup	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Agreement Sub-Status	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Alert	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>		
Alert Setting	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>		
Batch Job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		

Step7:

- Click on **Users**.


Security

Which feature would you like to work with?




Users

Add new users. Edit information about users and deactivate user records. Manage the teams, roles, and licenses assigned to users.




Security Roles

Create new security roles. Manage and delete existing security roles for your organization.



Field Security Profiles

Manage user and team permissions to read, create, or write information in secured fields.

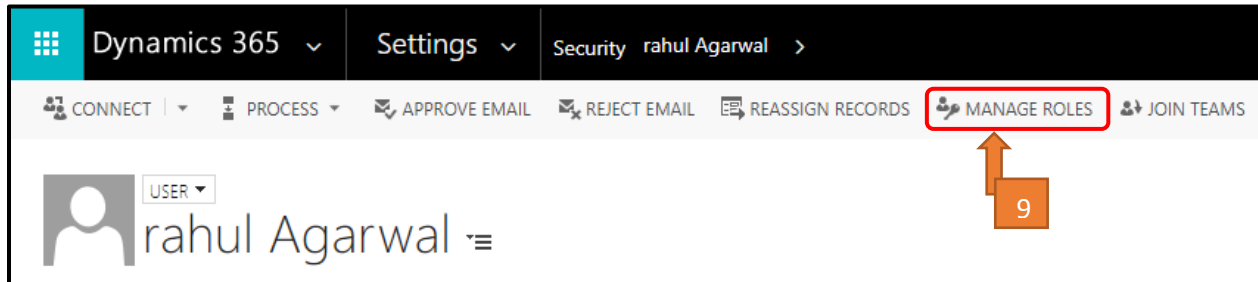


Positions

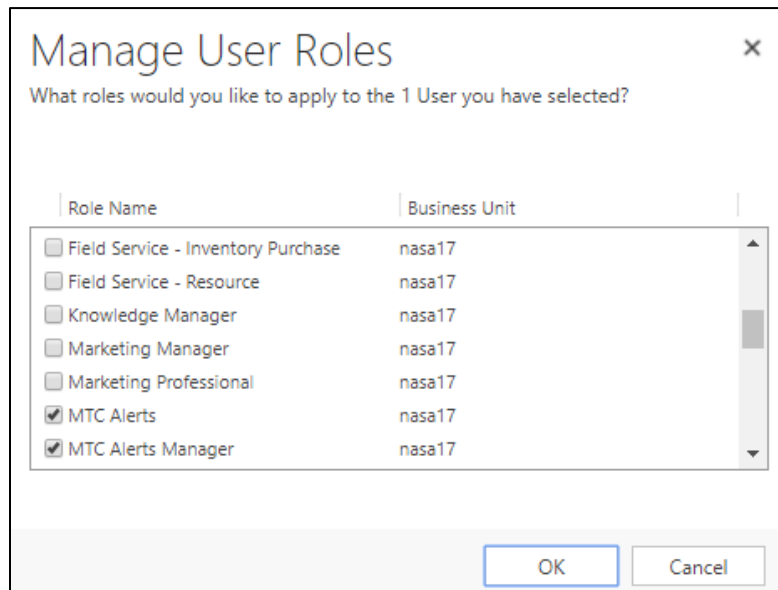
Add new Position. Modify the Position description.

Step8:

- Select any of the **users** and click on **Manager Roles**.



Step9:



Notes:

MTC Alerts - This User Roles has all the facilities as a regular user to use the functionality. But will not be able to create, or delete records.

MTC Alerts Manager - This User Roles has all the facilities and can create, or delete records.

How to Configure Alerts in your Dynamics 365 CRM?

Step 1:


- Navigate to **Dynamics365 -> Settings -> Solutions**. . You will find Alerts and Click on Alerts.

✓	Alerts	Alerts	365.062017....	8/18/2017	Managed	Management Technology Consulting
	Licensing	Licensing	1.0.5.5	8/18/2017	Managed	Management Technology Consultanc...
	ActivityTimer	Activity Timer	365.052017....	8/17/2017	Managed	Management Technology Consultanc...
	dsautonumber	Dotsquares Auto Number ...	1.0	8/9/2017	Managed	Dotsquares Ltd.
	MTC_AutoNumber	MTC AutoNumber	365.062017....	8/9/2017	Managed	Management Technology Consulting

Step 2:

- Click on **Alerts Settings**.

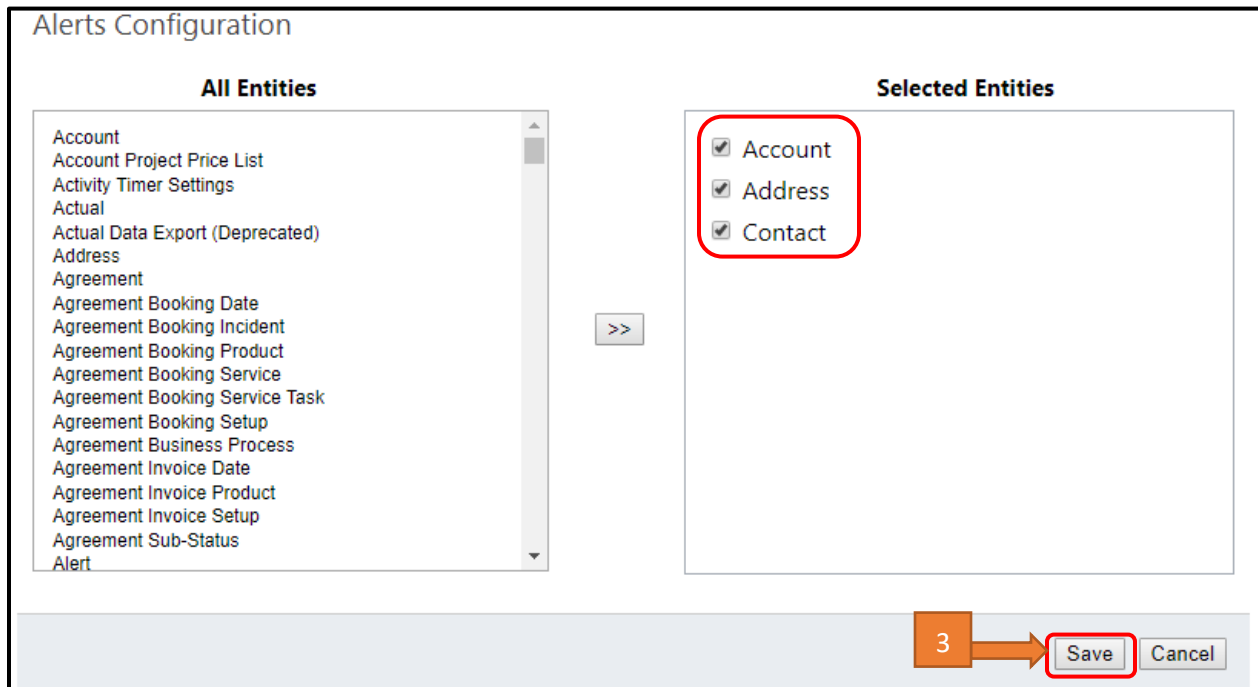
Alerts Configuration



Alerts Settings
This menu editor function allows you to add Alerts button in the best desired locations.

Step 3:

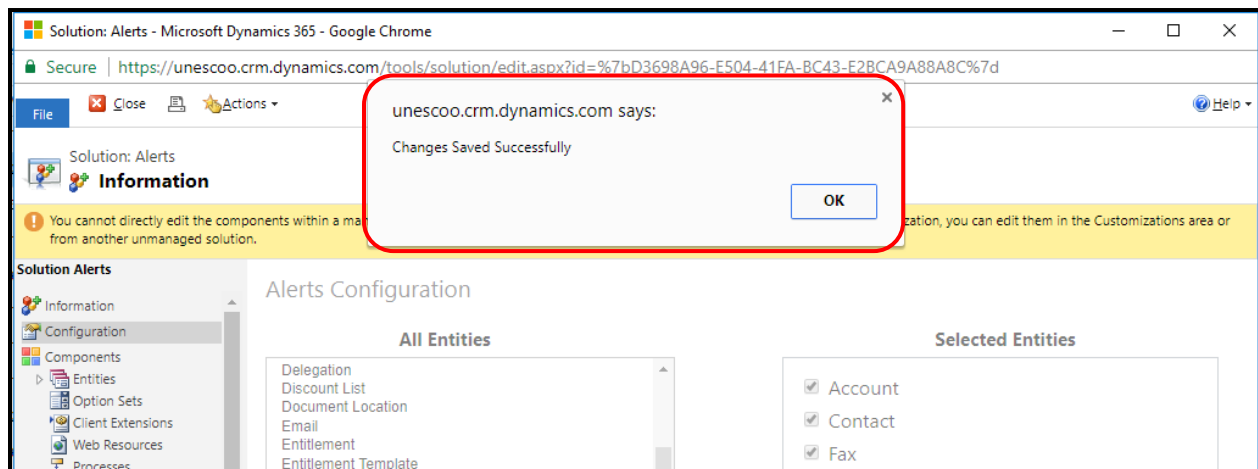
- Select one or more Entities from All Entities and click on double arrow >> button to move these entities to **Selected Entities** or you can double click on entities to move to the Selected Entities.
- After ticking all the entities checkboxes click on **save** button



The Alerts Configuration window is shown. It has two main panes: 'All Entities' on the left and 'Selected Entities' on the right. The 'All Entities' list includes: Account, Account Project Price List, Activity Timer Settings, Actual, Actual Data Export (Deprecated), Address, Agreement, Agreement Booking Date, Agreement Booking Incident, Agreement Booking Product, Agreement Booking Service, Agreement Booking Service Task, Agreement Booking Setup, Agreement Business Process, Agreement Invoice Date, Agreement Invoice Product, Agreement Invoice Setup, Agreement Sub-Status, and Alert. The 'Selected Entities' pane contains a red box around three checked items: Account, Address, and Contact. At the bottom right, there is a blue box with the number '3', an orange arrow pointing to a red-bordered 'Save' button, and a 'Cancel' button.

Step4:

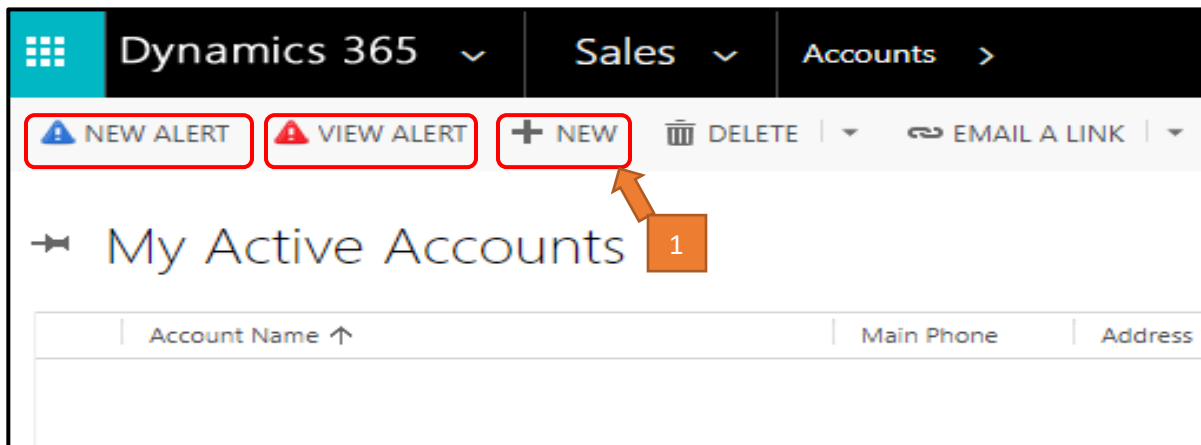
- After clicking on save button, **Changes Saved Successfully** popup message will come.



Alerts Functionality

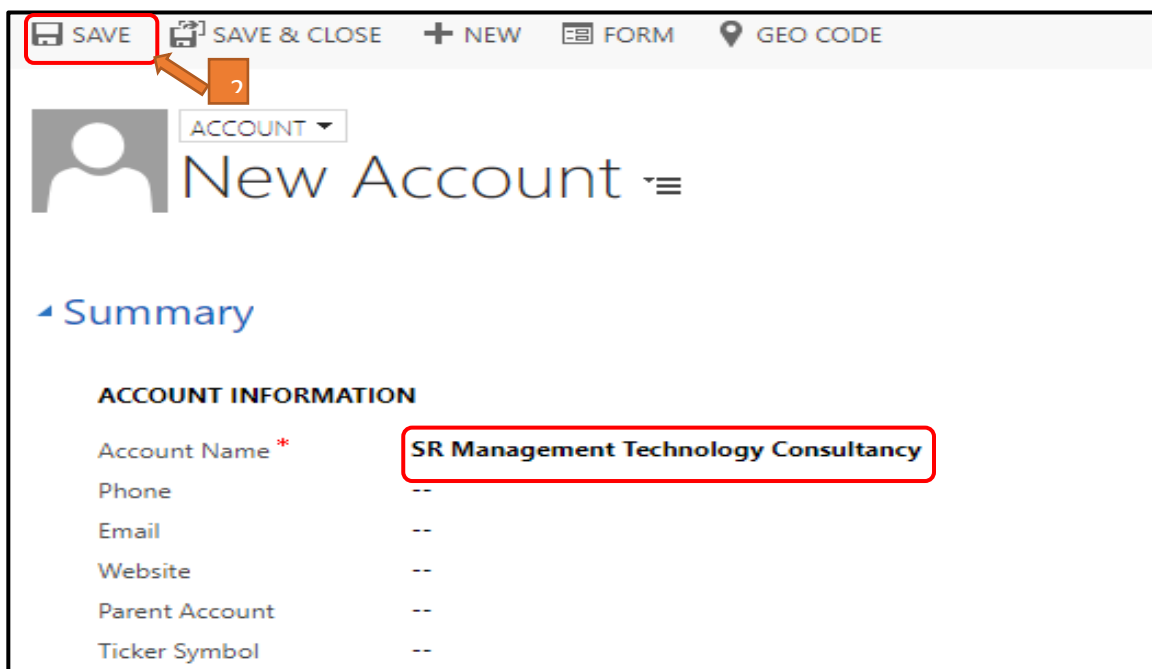
Step 1:

- Navigate to **Dynamic 365**, click on **Sales** and select **Accounts** as an example.
- Now you can find **New Alert** and **View Alert** ribbon buttons.
- To Create **New Account** click on **NEW**



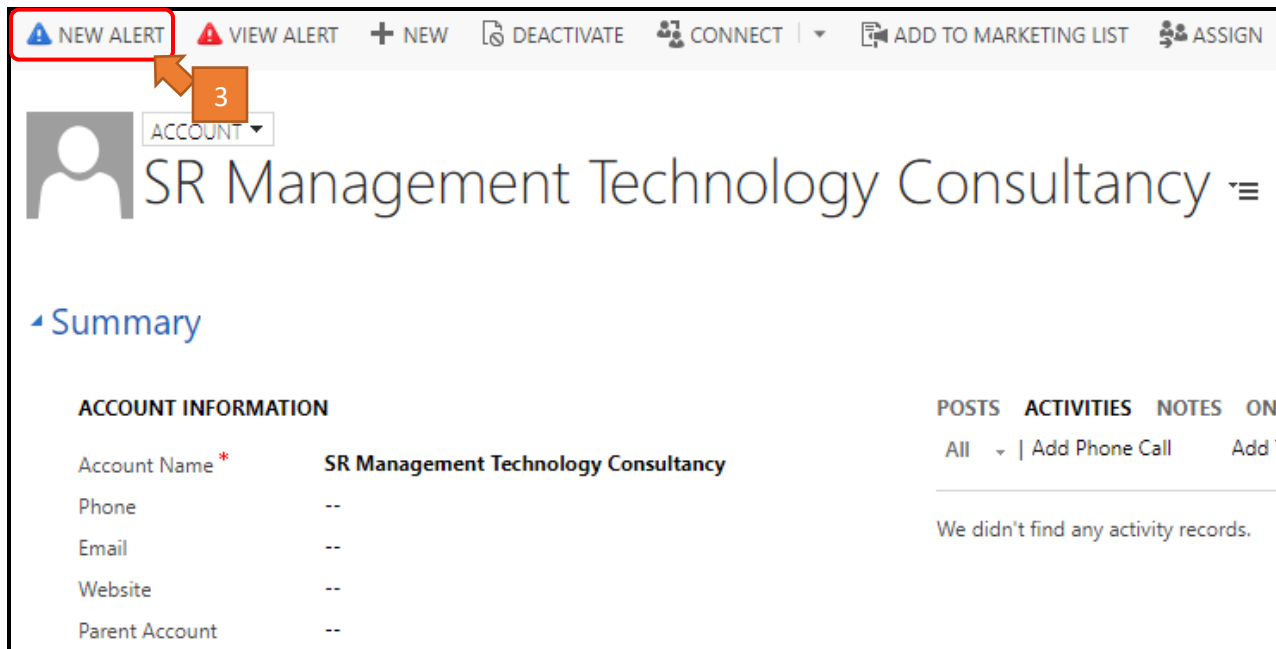
Step 2:

- Fill the **Account** details and **Save** it.

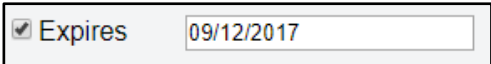



Step 3:

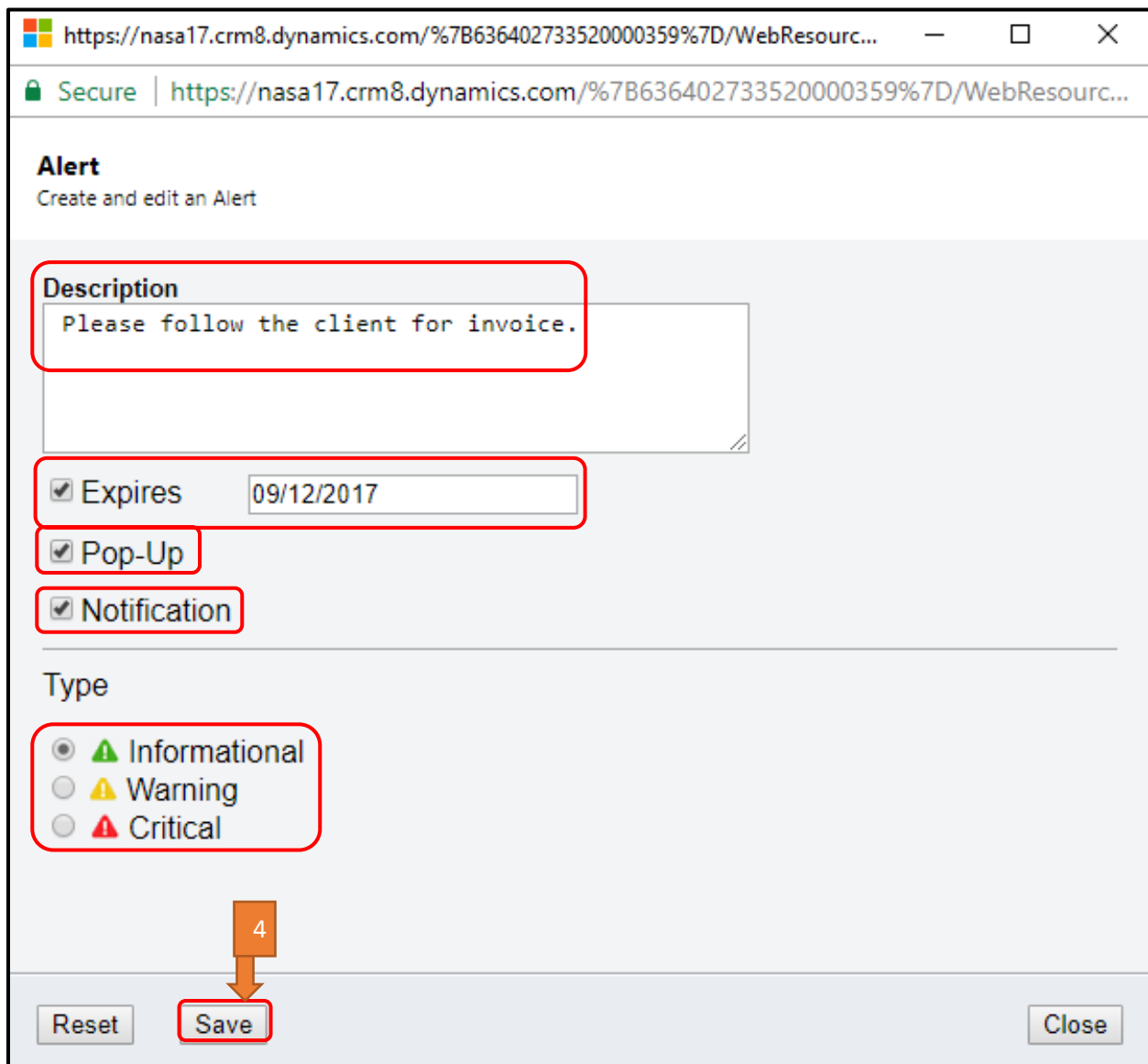
- Now you can see the **New Alert** and **View Alert** for which you created account.
- Click on **New Alert**.



Step 4:

- Clicking on **New Alert** Button a new window will open.
- Enter the **Description**.
- If the Alert you wish to keep as time bound then Click **Expires** and select the date from calendar. 
- If you wish to have this alert message as **Pop-Up** (means whenever you access the record a pop up message is displayed). 

- If you wish to have notifications message in CRM as a notification, then select Notification. ☒ Notification
- Select the **Type** (Category) of alert – **Informational** as example.
- Click on **save** button to save the Alert.



Alert
Create and edit an Alert

Description
Please follow the client for invoice.

☒ Expires 09/12/2017

☒ Pop-Up

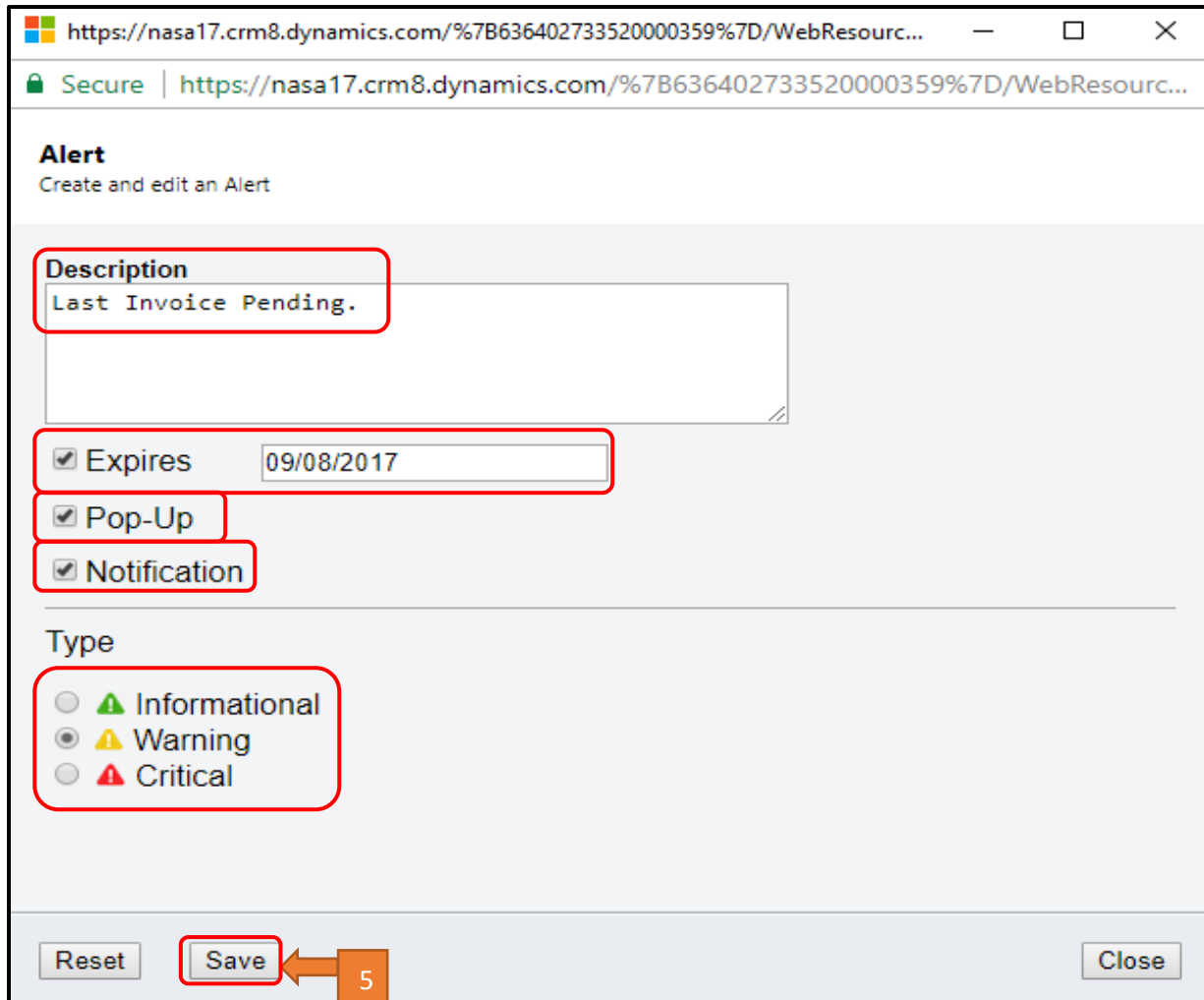
☒ Notification

Type

☒ Informational
☐ Warning
☐ Critical

4
Reset Save Close

- Select the **Type** (Category) of alert – **Warning** as example



https://nasa17.crm8.dynamics.com/%7B636402733520000359%7D/WebResourc...

Secure | https://nasa17.crm8.dynamics.com/%7B636402733520000359%7D/WebResourc...

Alert

Create and edit an Alert

Description

Last Invoice Pending.

☒ Expires 09/08/2017

☒ Pop-Up

☒ Notification

Type

☐ Informational


☒ Warning

☐ Critical

Reset Save Close

5

- Select the **Type** (Category) of alert –**Critical** as example.



Alert
Create and edit an Alert

Description
Invoice payment still due, follow the client

☒ Expires 09/07/2017

☒ Pop-Up

☒ Notification

Type

☐ Informational

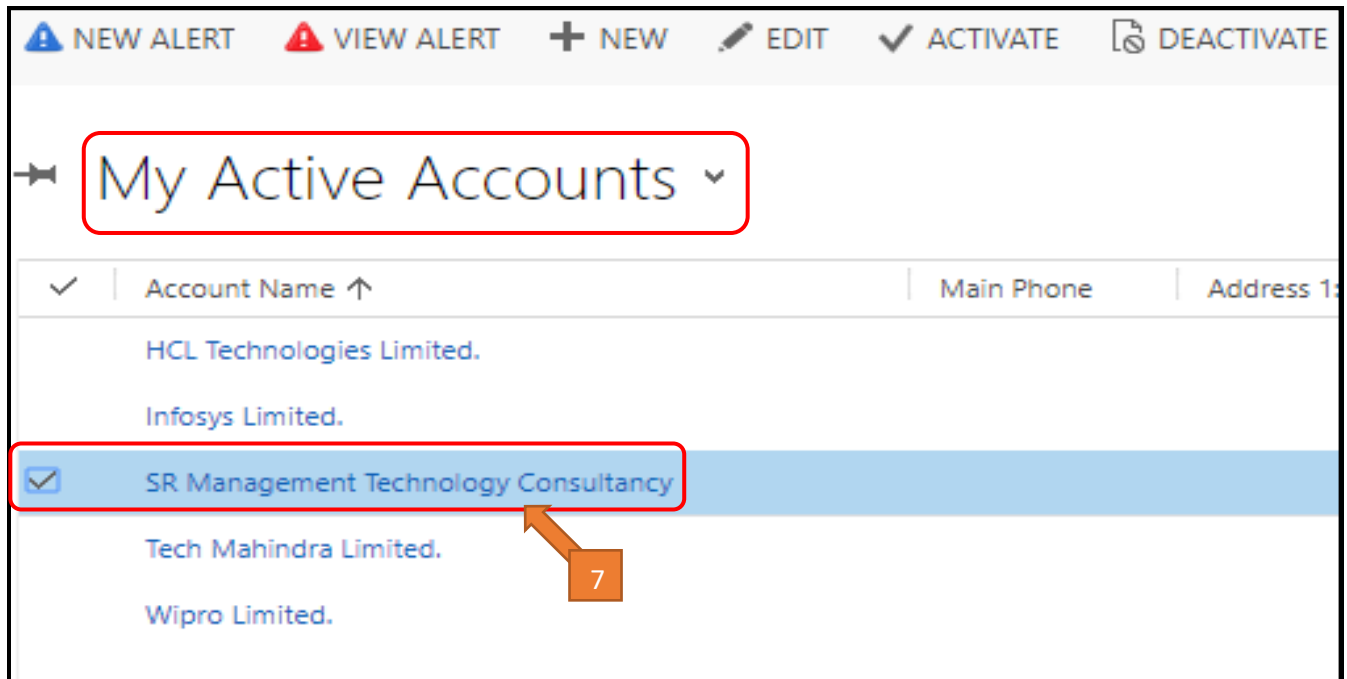
☐ Warning

☒ Critical

Reset Save Close

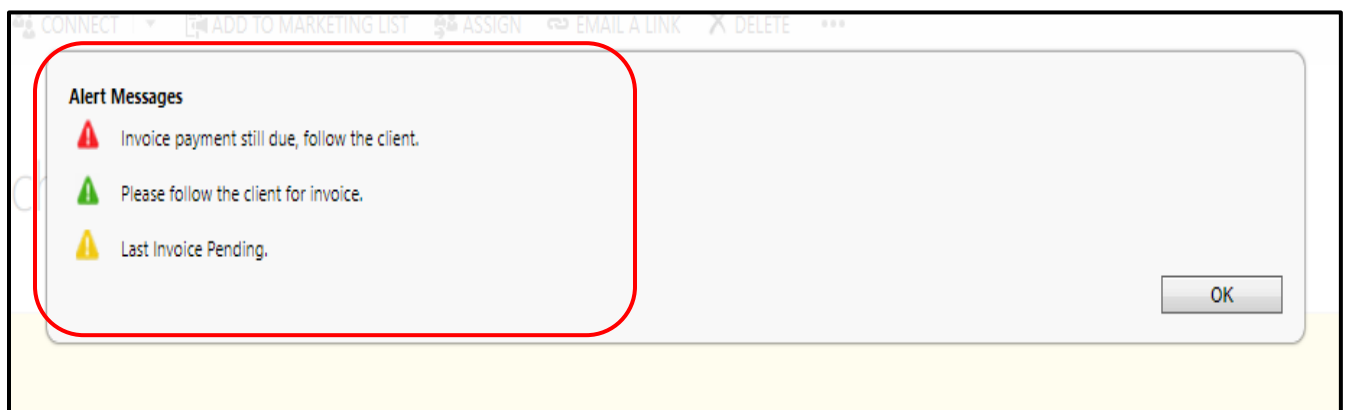
Step 5:

- Navigate to **Dynamic 365 -> Sales -> Accounts** and open the Account record on which you have applied alerts functionality.



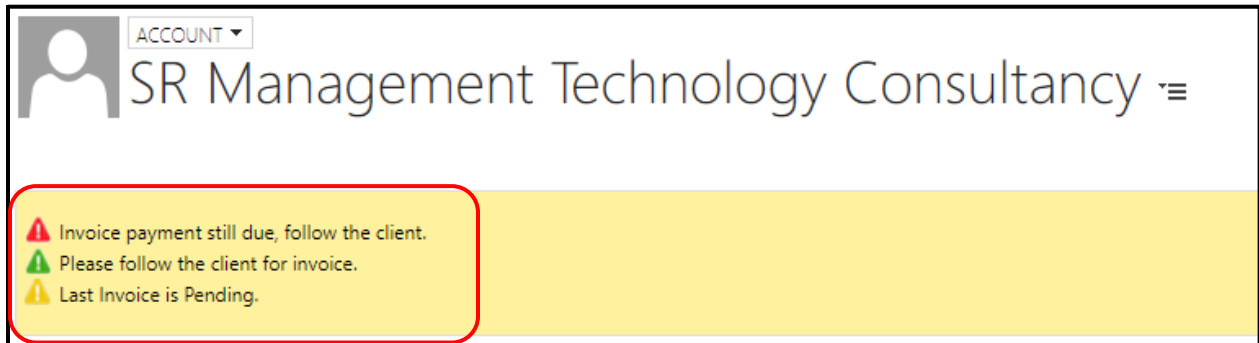
Step 6:

- When you open any account you will get a **popup message** as an alerts.



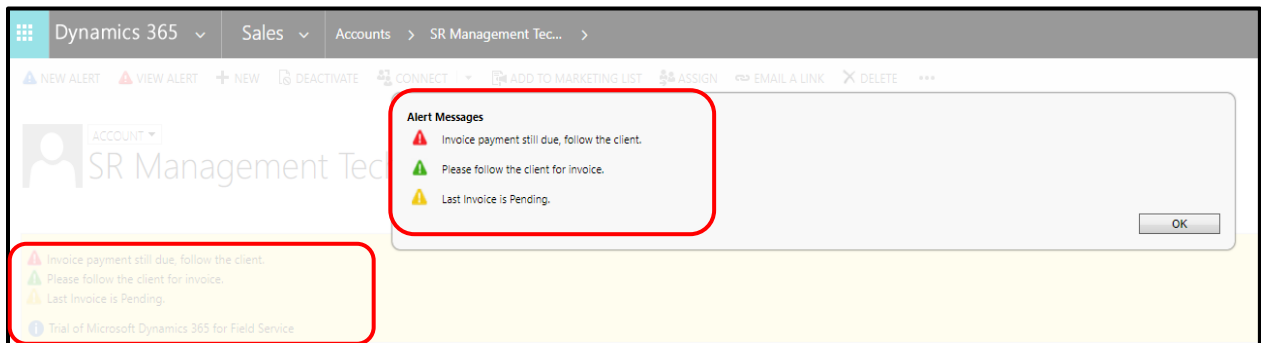
Step 7:

- You can also get the **notification alerts** on CRM header itself.



Step 8:

- You can get both **Popup message** and **Notification** alerts on CRM header at a time.



View Alert

Step 9:

- Open any **Account Record**, and click on **View Alerts**.
- Able to select all kinds of Alerts from the **Drop down list**.
- List All Alerts pertaining to the Selected record Entity.
- Able to **Inactivate** or **Activate** Alerts by clicking on the appropriate button
- Click **Ok** button.

Filter Alerts By:

Active Alerts: Allow the user to see all functional alerts.

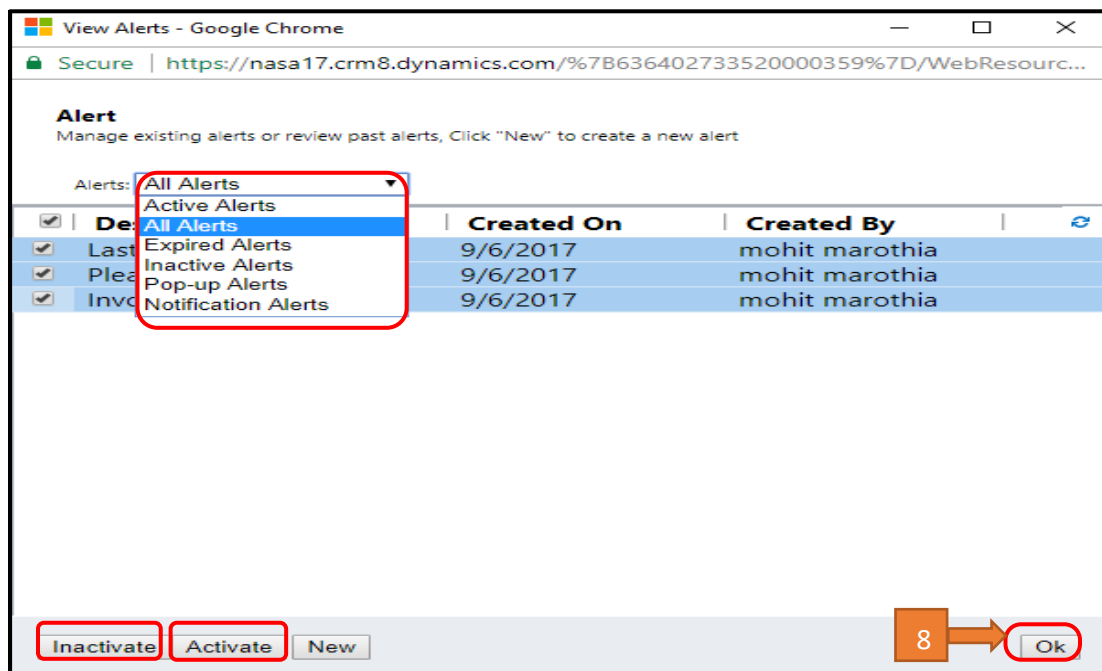
All Alerts: Allow the user to see all alerts.

Expired Alerts: Allow the user to see all expired alerts.

Inactive Alerts: Allow the users to see all non-functional alerts.

Pop-up Alerts: Allow the user to see all pop-up alerts.

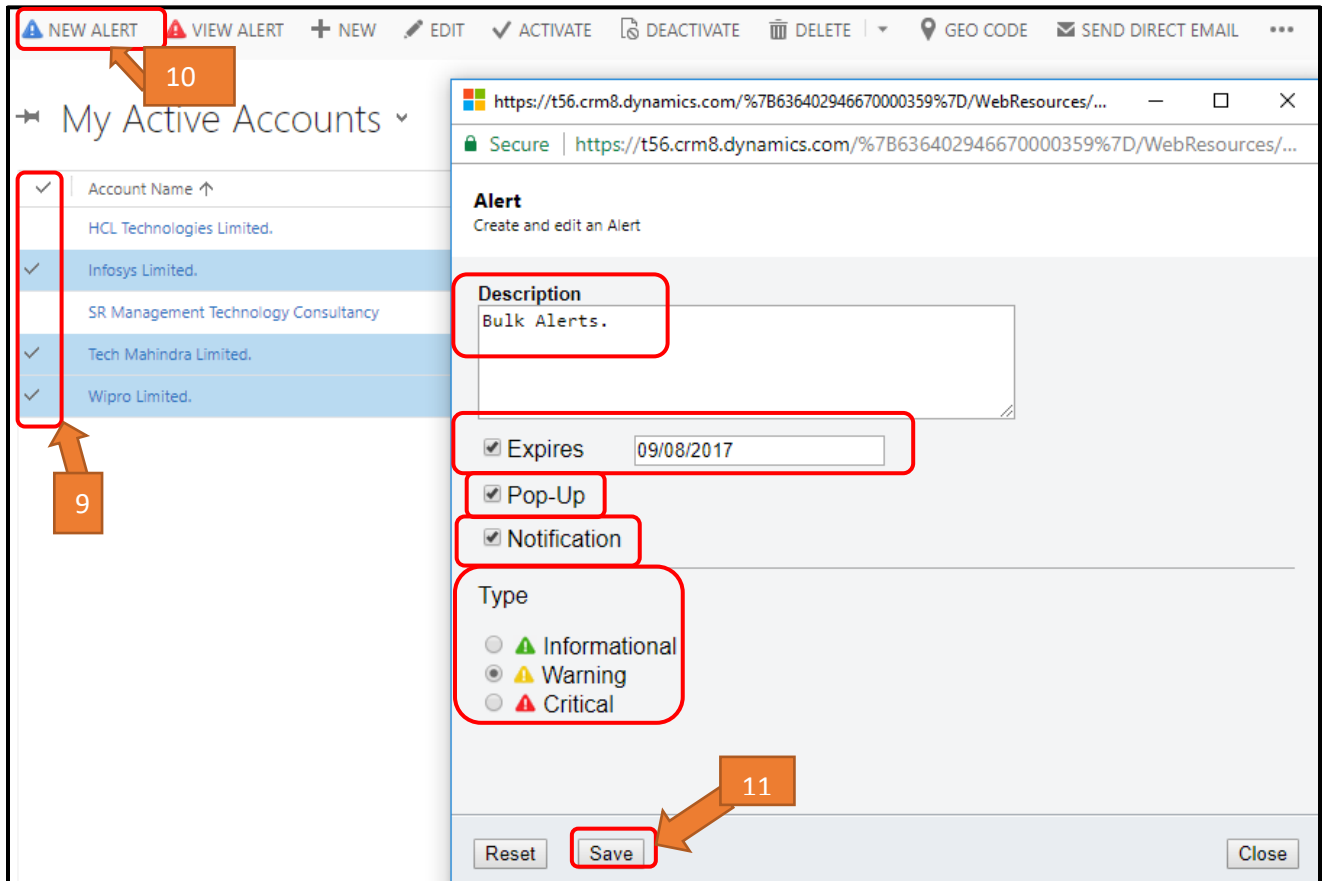
Notification Alerts: Allow the user to see all notification alerts.



Bulk New Alerts

Step 10:

- Go to **Dynamic365** and click on **Sales** and select **Accounts**
- Select **multiple Accounts** as you wish to create bulk alerts.
- After entering all details, click on **save** button to save the Alert.



The screenshot shows the 'My Active Accounts' page in Microsoft Dynamics CRM. The 'NEW ALERT' modal is open, allowing the user to create a new alert. The modal includes the following fields and options:

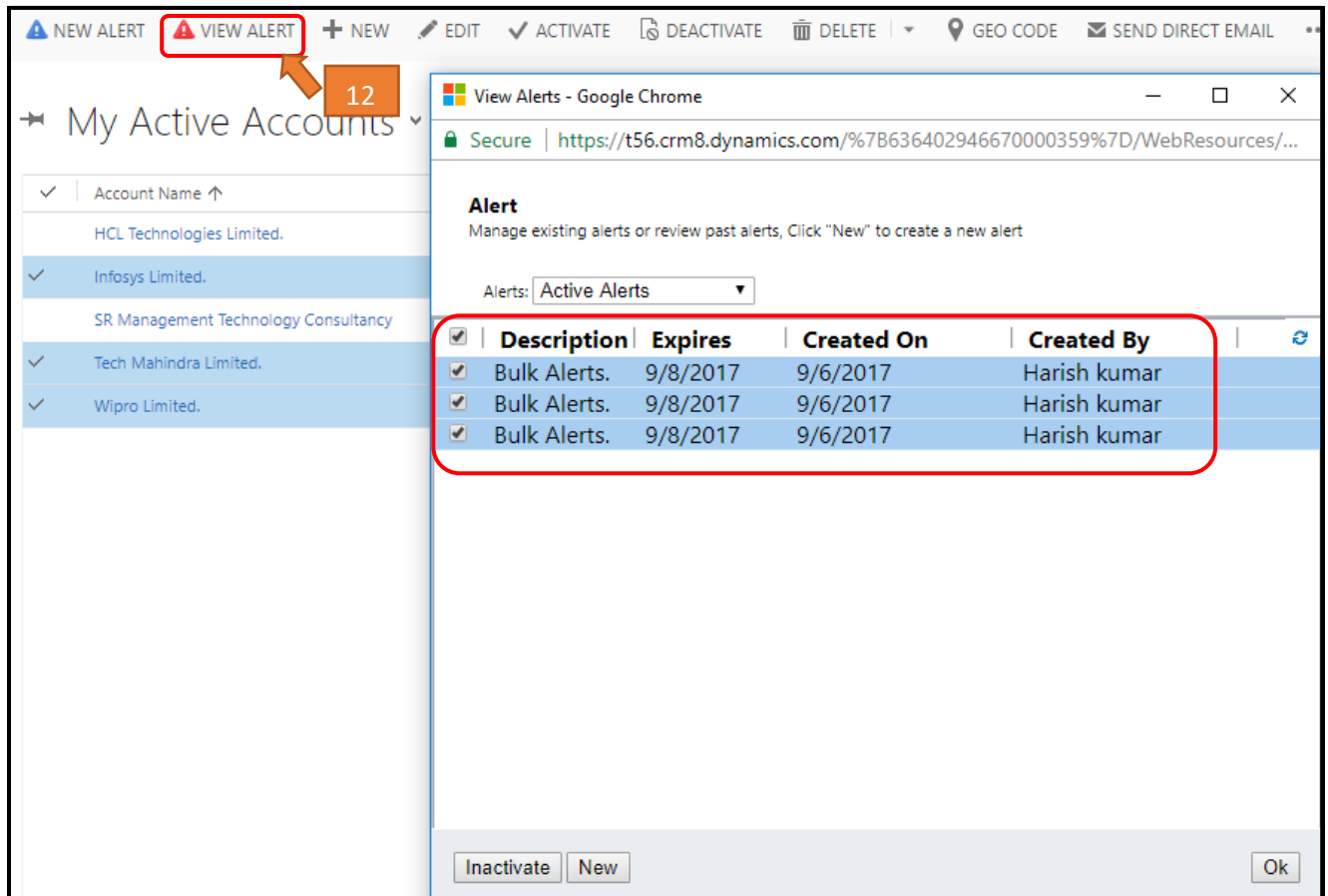
- Description:** A text area containing 'Bulk Alerts.'
- Expires:** A date field set to '09/08/2017'.
- Pop-Up:** A checkbox that is checked.
- Notification:** A checkbox that is checked.
- Type:** Radio buttons for 'Informational' (unselected), 'Warning' (selected), and 'Critical' (unselected).

At the bottom of the modal are buttons for 'Reset', 'Save', and 'Close'. The 'Save' button is highlighted with an orange arrow labeled '11'. In the background, the 'My Active Accounts' list shows five accounts selected, indicated by checkmarks and an orange arrow labeled '9'. The 'NEW ALERT' button in the top toolbar is highlighted with an orange arrow labeled '10'.

Bulk View Alerts

Step 11:

- Click on **View Alert**.
- All Alerts pertaining to **Selected Account Records** are displayed.



Alert
Manage existing alerts or review past alerts, Click "New" to create a new alert

Alerts:

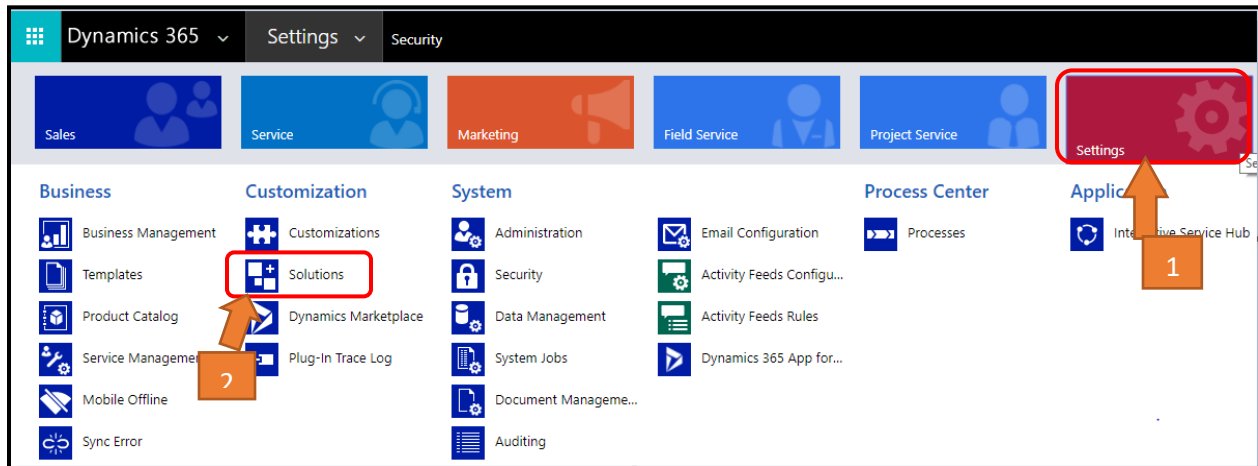
<input checked="" type="checkbox"/>	Description	Expires	Created On	Created By
<input checked="" type="checkbox"/>	Bulk Alerts.	9/8/2017	9/6/2017	Harish kumar
<input checked="" type="checkbox"/>	Bulk Alerts.	9/8/2017	9/6/2017	Harish kumar
<input checked="" type="checkbox"/>	Bulk Alerts.	9/8/2017	9/6/2017	Harish kumar

Inactivate New Ok

How to Uninstall Alerts Solution?

Step1:









- To Uninstall Alert Solution navigate to **Settings Solution**



Step2:

- Upon Configuring the Alert settings will get **AlertRibbonSolution**. In order to delete the **Alert Solution** first we need to delete **AlertRibbonSolution**.
- Select the solution and click on **Delete**.

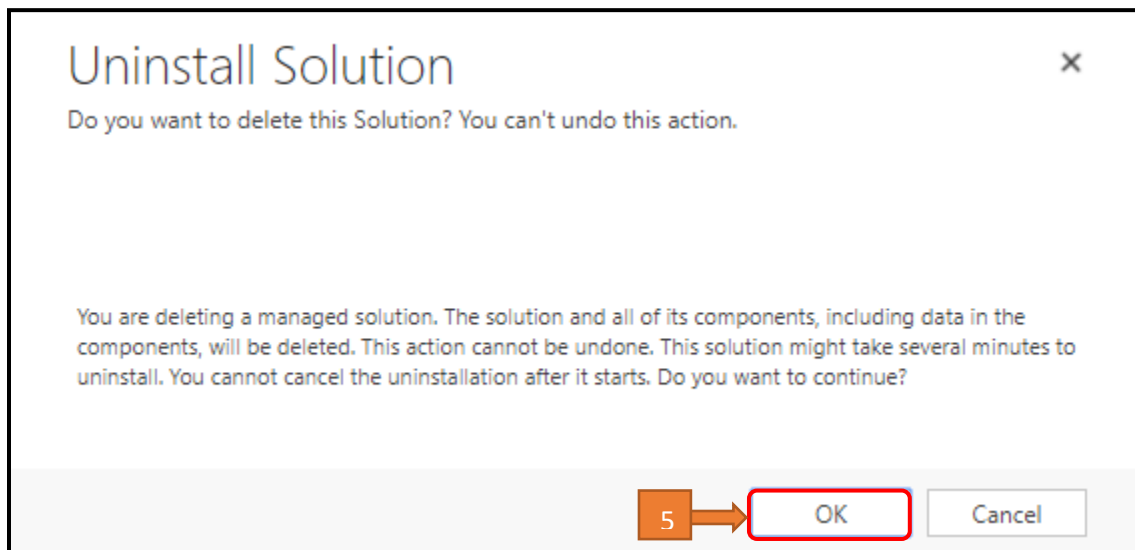
All Solutions ▾

 New
  Delete
  Import
  Export
  Clone a Patch
  Clone Solution
  Apply Solution Upgrade
  Import Translations

Name	Display Name	Version	Installed On ↓	Package Type	Publisher
ActivityTimer	Activity Timer	365.052017....	8/26/2017	Managed	Management Technology Consultanc...
✓ AlertRibbonSolution	AlertRibbonSolution	1.0.0.0	8/26/2017	Managed	Management Technology Consultanc...
Alerts	Alerts	365.062017....	8/26/2017	Managed	Management Technology Consulting
dsautonumber	Dotsquares Auto Number ...	1.0	8/26/2017	Managed	Dotsquares Ltd.
MTC_AutoNumber	MTC AutoNumber	365.062017....	8/26/2017	Managed	Management Technology Consulting
Licensing	Licensing	1.0.5.5	8/26/2017	Managed	Management Technology Consultanc...
FieldServiceDemoAutoMove	Field Service Demo Auto ...	6.1.0.1	8/17/2017	Managed	Microsoft Dynamics

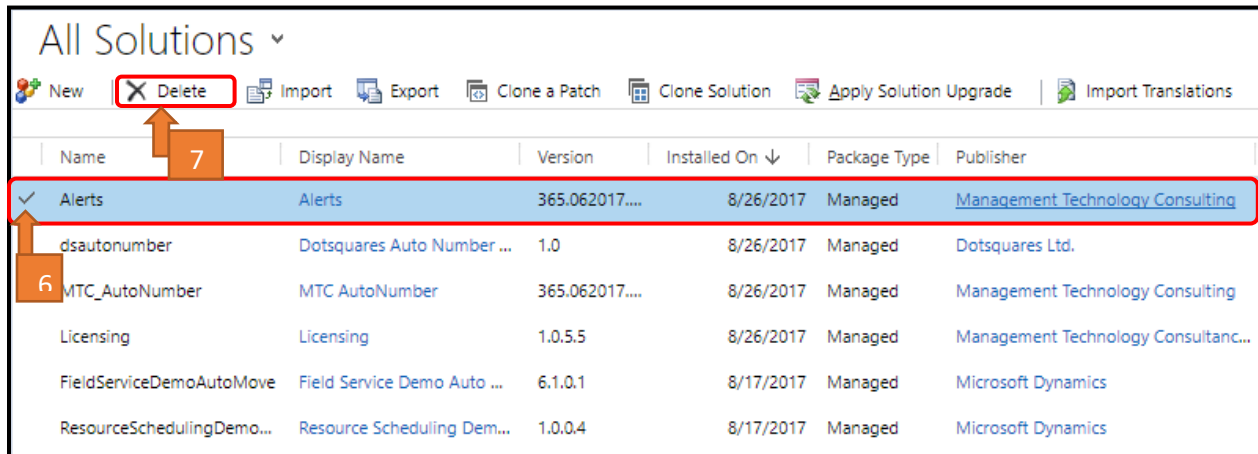
Step3:

- Click on **ok** to start uninstalling AlertRibbonSolution.



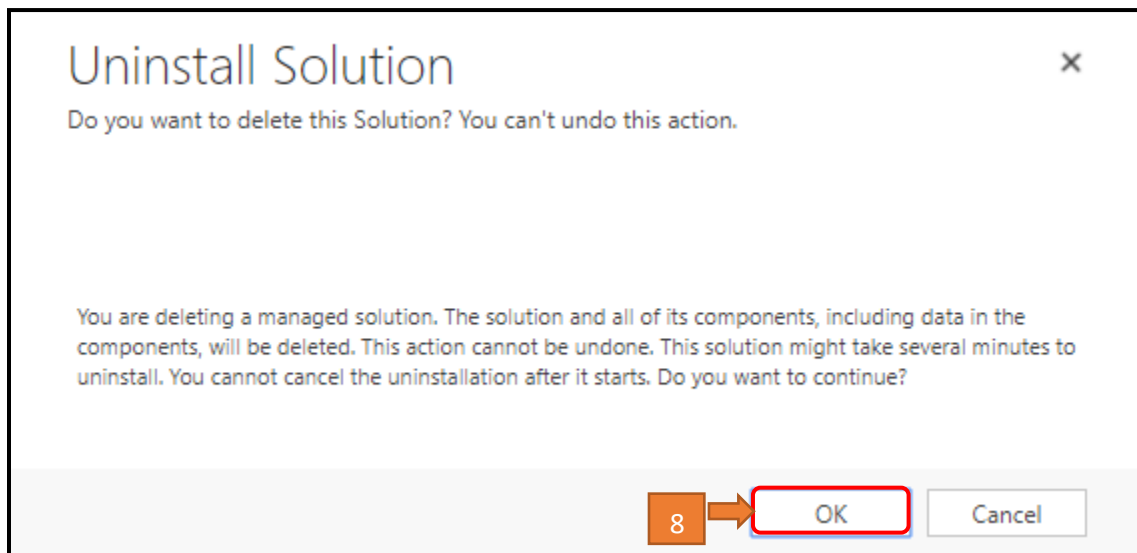
Step4:

- Click on **Alerts** and click on **Delete** to uninstall the **Alerts Solution**.



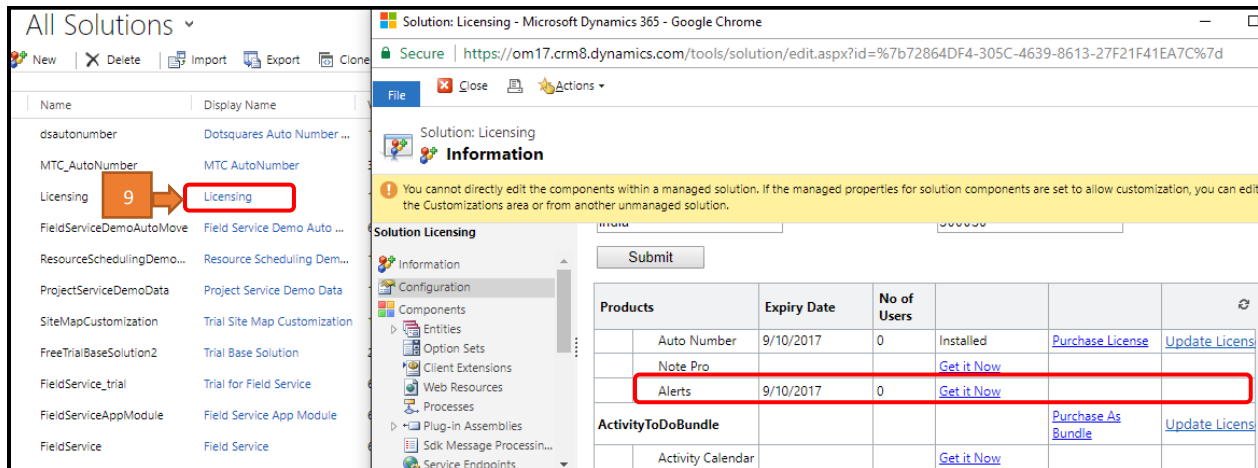
Step5:

- Click on **ok** to start uninstalling the Alert solutions.



Step6:

- Click on **licensing**. You can see that Alerts solutions has been changed to **Get It Now** from **Installed**. But the expiry date will be as usual.



The screenshot displays the Microsoft Dynamics CRM Solution Licensing interface. On the left, the 'All Solutions' list shows various solutions, with 'Licensing' selected. The right pane shows the 'Solution Licensing' configuration for the 'Alerts' solution. The 'Alerts' row is highlighted, showing an expiry date of 9/10/2017 and a status of 'Get it Now'.

Products	Expiry Date	No of Users			
Auto Number	9/10/2017	0	Installed	Purchase License	Update License
Note Pro			Get it Now		
Alerts	9/10/2017	0	Get it Now		
ActivityToDoBundle				Purchase As Bundle	Update License
Activity Calendar			Get it Now		