



Alerts4Dynamics



White Paper

Alerts4Dynamics - White Paper

Aim:

Alerts4Dynamics is a productivity app for assisting managers to create and manage alerts in Dynamics 365 CRM.

Alerts4Dynamics alerts the users with relevant information that the manager wants to update them with.

Features:

- Supports OOB as well as Custom Entities
- Create Announcement and Rule Based/Record Based/Event Based alerts
- Alerts can be viewed as pop-ups, form notifications or sent as email not only to users but also to customers as well
- Alerts levels can be categorized as Information, Warning or Critical
- View the log of alerts read/dismissed by users
- Add start/expiration dates for all alerts
- Alerts can be configured to be shown to particular set of audience as well as for dynamics audience
- Related records can also be added for Notification and Email audiences
- View alerts from anywhere in CRM

Supported Versions

Versions: Microsoft Dynamics CRM v9.x & above, Power Apps and CDS

Deployment Models: On-Premises and Online

Who needs it?

Alerts4Dynamics enables managers in Dynamics 365 CRM to create and schedule alerts for users. This notifies the users with the information they need to be updated within their CRM. It allows the users to stay active and be in sync with the entire business process by being up-to-date with their ongoing process, deals and external factors that may have an influence on their strategy.

Entity Configuration

Entity Configuration is automatically created for selected Entities from License Registration Page.

The screenshot shows the Alerts4Dynamics interface for license registration. It includes fields for CRM Version (9.1) and User License (5). The 'Notification' section is expanded, showing 'Notification Details' with 'From' (Alex Wu) and 'To' (John B). The 'License Registration using (.lic) file' section has a 'Choose file' button. The 'Enable Entity Configuration' section is highlighted with a red box and shows 'Available Entities' (Playbook activity attribute, Position, Price List, Product Association, Product Relationship, Queue) and 'Selected Entities' (Account, Contact, Invoice, Opportunity, Product). License Start Date is 06/17/2019 and License End Date is 10/15/2019.

Alert Types

Managers can create four types of alerts for the users in Dynamics 365 CRM i.e. Announcement, Record Based, Rule Based and Event Based. Record Based alerts are created from the record itself.

New Alert

General

The screenshot shows the 'New Alert' form. The 'Name' field is empty with a red asterisk and three dashes. The 'Alert Type' dropdown menu is open, showing 'Announcement' selected, 'Rule Based', and 'Announcement' (highlighted in blue).

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Alert Level

Alert messages can be of **Information**, **Warning** or **Critical** level.

New Message

General Notification

Notification Message

Message Text * ---

Notification Configuration

Alert Level * --Select--

- Select--
- Warning
- Information
- Critical

Display Until

Define Mode of Alert

Alerts can be viewed as Pop-Ups, Form Notifications and sent as Email to the defined users.

Alert As * Select or search options

Select all 3 items

Pop-Up

Form Notification

Email Notification

Define Audience

Define the target audience whom you would like to send the notifications to.

Notification Audience

Include Users

Exclude Users

Security Roles

Teams

Multiple Languages

Alert messages can be sent in multiple languages.

Der Account {name} wurde aktualisiert.

Language

General Related

Message * **Der Account {name} wurde aktualisiert.**

Language * German

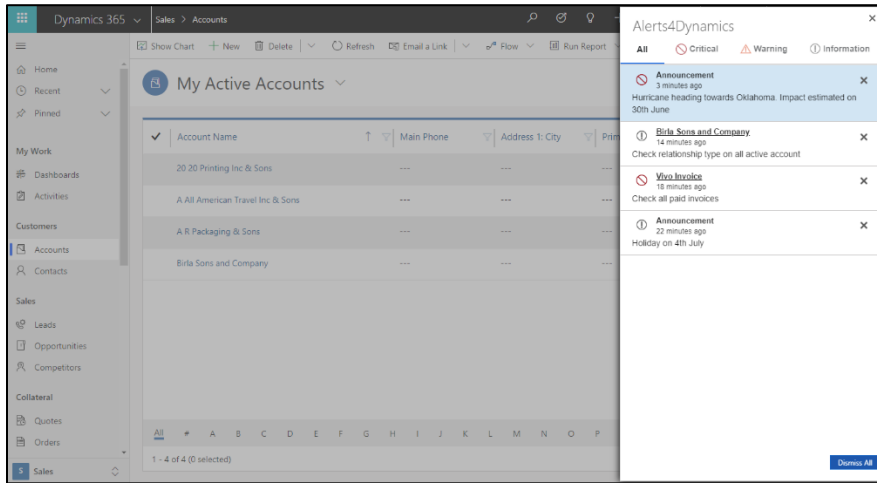
- German
- French
- Hebrew

Notification Message * Update Account Message

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View Notifications

Alert messages for all alert levels can be seen in notifications until they are dismissed.



View Log

View log of alerts read/dismisssed by users.

Notification	
General	Related
Read Notifications	
<input checked="" type="checkbox"/> User ↓	Date ↓
<input checked="" type="radio"/> Ruben Leo	6/5/2020 1:09 PM
<input type="radio"/> Lucy Heart	6/5/2020 1:18 PM
<input type="radio"/> Andy Moore	6/5/2020 1:16 PM
Dismissed Notifications	
<input checked="" type="checkbox"/> User ↓	Date ↓
<input checked="" type="radio"/> Ruben Leo	6/5/2020 1:10 PM
<input type="radio"/> Lucy Heart	6/5/2020 1:18 PM
<input type="radio"/> Andy Moore	6/5/2020 1:16 PM

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