



Alerts4Dynamics

Schedule and Manage Alerts in Dynamics 365 CRM



crm@inogic.com



Available on
Microsoft AppSource



Key Features

**Global Announcements,
Record level messages,
Automate using criteria
or events**

Alert Categories

Notifications can be categorized as Information, Warning or Critical

Display options

View notifications as Pop-ups and/or Form Notifications with the ability to send email notification as well

Alert Duration

Add Process Start Date, Process End Date and Display End Date for all notifications.

Define Audience

Alerts can be configured to be shown to particular set of audience as well as for dynamic audience

Log

Log of Read/Dismissed Alerts can be seen.

- *Alerts can be created and managed for OOB as well as Custom Entities*
- *View Alerts from anywhere in Dynamics 365 CRM*

Available For

SUPPORTED VERSIONS

- MICROSOFT DYNAMICS CRM 9.x & ABOVE
- POWER APPS
- CDS

DEPLOYMENTS

- ON-PREMISES
- ONLINE

Form and Pop-up notification

Sales Hub Sales > Accounts > Best o' Sales

+ New Open Org Chart Deactivate Connect Add to Marketing List Assign Email a Link

! Invoice Due

BO Best o' Sales
Account · Account

Summary Map Project Price Lists Details Field Service

ACCOUNT INFORMATION

Account Name
Best o' Sales

Phone
93900263

Timeline

Enter a note...

WL Email from William Louis
Alert: Best o' Sales CRM:0008032

Dynamics 365 Sales Hub Sales > Accounts > Best o' Sales

+ New Open Org Chart Deactivate Connect Add to Marketing List Assign Email a Link

! Invoice Due

BO Best o' Sales
Account · Account

Summary Map Project Price Lists Details Field Service Scheduling Related

ACCOUNT INFORMATION

Account Name
Best o' Sales

Phone
93900263

Email

Fax

Website

Parent Account

Ticker Symbol

Timeline

Enter a note...

WL Email from William Louis
Alert: Best o' Sales CRM:0008032 18/2/2020

Auto-post on Best o' Sales
Account: Created By William Louis. 17/2/2020

Alerts4Dynamics

All Critical Warning Information

! Best o' Sales
14 minutes ago
Invoice Due

Dismiss All

View and dismiss Notifications

The screenshot shows the Dynamics 365 Accounts page. The left sidebar contains navigation options: Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts (selected), Contacts, Sales, Leads, Opportunities, Competitors, Collateral, Quotes, Orders, and Sales. The main area displays 'My Active Accounts' with a table of accounts.

Account Name	Main Phone	Address 1: City	Prim
20 20 Printing Inc & Sons	---	---	---
A All American Travel Inc & Sons	---	---	---
A R Packaging & Sons	---	---	---
Birla Sons and Company	---	---	---

At the bottom of the table, it says '1 - 4 of 4 (0 selected)'.

Overlaid on the right is the 'Alerts4Dynamics' notification window. It has a filter bar with 'All', 'Critical', 'Warning', and 'Information'. The notifications listed are:

- Announcement** (3 minutes ago): Hurricane heading towards Oklahoma. Impact estimated on 30th June.
- Birla Sons and Company** (14 minutes ago): Check relationship type on all active account.
- Vivo Invoice** (18 minutes ago): Check all paid invoices.
- Announcement** (22 minutes ago): Holiday on 4th July.

A 'Dismiss All' button is at the bottom right of the notification window.

Read and Dismissed Notifications

Notification

General

Related

🔒 Message Text

Mobile number and email information is missing on this account

🔒 Display End Date

🔒 Language

English

🔒 Alert

🔔 Info missing

🔒 Message

+

📧 Update info

🔒 Notification Request

+

Read Notifications

🔄 Refresh

✓ | User ↓ ▾

Date ▾

🟢 Ruben Leo

6/5/2020 1:09 PM

🕒 Lucy Heart

6/5/2020 1:18 PM

🕒 Andy Moore

6/5/2020 1:16 PM

Dismissed Notifications

🔄 Refresh

✓ | User ↓ ▾

Date ▾

🟢 Ruben Leo

6/5/2020 1:10 PM

🕒 Lucy Heart

6/5/2020 1:18 PM

🕒 Andy Moore

6/5/2020 1:16 PM

Entity Configuration



✓ ACTIVATE ↻ SEND REQUEST

CRM Version 9.1

User License 5

Notification

Notification Details

(Notify User and Inogic about issues regarding licensing.)

From Alex Wu (alex@a4dobf.onmicrosoft.com)

To John B (john@a4dobf.onmicrosoft.com)

Notify To Inogic ☒

Notification Interval ☒ Once a day ☐ Once a week ☐ Once a month

License Registration using (*.lic) file

Enable Entity Configuration

Available Entities

Action Card Role Setting
actioncardregarding
Address
Appointment
Article
Bookable Resource
Bookable Resource Booking

>>

<<

Selected Entities

Account
Contact
Invoice
Lead

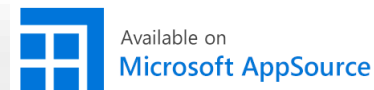
License Start Date 06/17/2019

License End Date 10/15/2019

Active



crm@inogic.com



Global Notifications

Save

Save & Close

Delete

Refresh

Share

Email a Link

Flow

Holiday Alert

General

Related

Name

*

Holiday

Alert Type

*

Announcement

Messages

✓ | Name

Holiday on 30th July

Holiday on 30th July

Message

General

Notification

Related

Name

*

Holiday on 30th July

Alert

*

Holiday

Process Start Date

*

6/4/2020

Notification Message

Message Text

*

Holiday on 30th July due to elections

Holiday on 30th July

Message

Active Status

Active Status Reason

Owner

General

Notification

Related

Notification Message

Message Text

*

Holiday on 30th July

Language

*

English

Notification Configuration

Alert Level

*

Information

Alert As

*

Pop-Up, Form Notification, ...

Display Until

1 hour

Email Workflow

*

Send Email Notification

Notification Audience

Include Users

Jane Doe

Exclude Users

John Watson

Security Roles

Salesperson

Teams

Sales Team

Notification Message

✓ | Message

↑

↓

Language

↓

Holiday on 30th July

English

+ New Language

:

Record Level Notifications

AD

A. Datum Corporation (sample)
Account · Account ▾

SummaryDetailsFilesAlertsRelated

Show Chart

+

New Alert

Add Existing Alert

Refresh

Run Report ▾

Alert Associated View ▾

✓ Name ▾Alert Type ▾

Account OverdueRecord Based

Account Overdue message

Message

GeneralNotificationRelated

Name

*

Account Overdue message

Message Type

*

Simple

Alert

*

Account Overdue

Process Start Date

*

6/5/2020

Notification Message

Message Text

*

Check account bal...

Language

English ▾

Notification Configuration

Alert Level

*

Critical

Alert As

*

Form Notification

Display Until

45 minutes

Notification Audience

Include Users

Exclude Users

Security Roles

Teams

x Sales Team

Notification Message

✓ Message ↑ ▾Language ▾

Check account balance before new sales

English

Criteria based Automated Notifications

Update Account Alert

Alert

General

Related

Name

*

Update Account Alert


Alert Type

*

Rule Based

Entity Configuration

*

 account

Rule Mode

*

Advanced

Fetch XML

*

<fetch version="1.0" xmlns="http://schemas.microsoft.com/xrm/2011/Serialization" mapping="log" <entity name="account" <attribute name="name" type="string" /></entity></div>

Update Account Message

Message

General

Notification

Related

Name

*

Update Account Message


Message Type

*

Simple

Alert

*

 Update Account Alert

Process Start Date

*

6/5/2020

Process End Date

6/18/2020

Notification Message

Message Text

*

Account {name} has been Up...

Language

*

English

Notification Configuration

Alert Level

*

Warning

Alert As

*

Pop-Up, Form Notification, Email ...

Display Until

1 hour

Email Workflow

*

 Send Email Notification

Notification Audience

Include Users

x Owing User

x Owing User.Manager

Exclude Users

x Walter White

Security Roles

Teams

Notification Message

+ New Language

✓ Message ↑ ↓

Language ↓

Account {name} has been Updated

English

Automated Notifications through Workflows

GeneralAdministrationNotes

▼ Hide Process Properties

Process Name *
Notification for Paid Invoice

Entity
Invoice

Activate As
Process ▼

Category
Workflow ...

Available to Run

☒ Run this workflow in the background (recommended)

☒ As an on-demand process

☐ As a child process

Workflow Job Retention

☒ Automatically delete completed workflow jobs (to save disk space)

Add Step ▼ | Insert ▼ | Delete this step.

Create Notification

Create: Notification Request ▼ Set Properties

Process: Notify on Invoice Paid

Create Notification Request

Notification Settings

Name *
Alert for invoice paid

Message Text *
[Name(Invoice)] has been paid

Alert As *
Pop-Up, Form, Email Notification ▼

Alert Level *
Information ▼

Display Until
3 days ▼

Notification Associated With *
[Record URL(Dynamic)(Customer (Account))]

Audience Settings

Notification Audiences

Include Users
[Owning User(Invoice)] [Manager(Owning User (User))]

Exclude Users
Jane Doe

Team

Email Details


To - Same As Include Users
☒ Yes ☐ No

From
John Watson


CC
Scott Hamells


To

BCC

 Alerts4Dynamics

crm@inogic.com


 Available on
Microsoft AppSource

 innovative logic
inogic

Set Alert Message and Level

Holiday on 30th July
Message

General Notification Related

Name	* Holiday on 30th July
Alert	*  Holiday
Process Start Date	* 6/4/2020

Notification Message

Message Text	* Holiday on 30th July due to elections
--------------	---

Holiday on 30th July
Message


Active Status Active Status Reason Owner

General Notification Related

Notification Message

Message Text	* Holiday on 30th July	Language *	English
--------------	------------------------	------------	---------

Notification Configuration

Alert Level	* Information	Alert As	* Pop-Up, Form Notification, ...
Display Until	1 hour	Email Workflow	*  Send Email Notification

Notification Audience

Include Users	Jane Doe	Exclude Users	John Watson
Security Roles	Salesperson	Teams	Sales Team

Notification Message

+ New Language

✓ Message ↑	Language ↓
Holiday on 30th July	English

Message Types

Update Account Message

Message

Active StatusActive Status ReasonOwner

GeneralNotificationRelated

Name*

Update Account Message

Message Type*

Advanced

Workflow*

Create Account Notification

Alert

Update Account Alert

Process Start Date*

6/5/2020

Process End Date

6/18/2020

Update Account Message

Message

GeneralNotificationRelated

Name*

Update Account Message

Message Type*

Simple

Alert*

Update Account Alert

Process Start Date*

6/5/2020

Process End Date

6/18/2020

Next Steps

- Learn more about [Alerts4Dynamics](#) today.
- Get your free **Alerts4Dynamics** trial now from [Microsoft AppSource](#) or [our website](#)!
- Email: crm@inogic.com

