



User Manual

Content

Introduction	3
Security Roles.....	3
Entity Configuration	4
Alerts	6
Display of Alerts	7
Alert as Pop up:.....	7
Alert as Form notification – Dialog	8
Alert as Form notification – Bar	8
Alert as Email Notification	9
Set User Preference	10
Scenario 1:.....	10
Scenario 2:.....	17
Record Based Alerts	22
Rule Based Alerts	24
Announcement	28
Event Based Alerts	29
Message	44
Notification Message (Languages)	49
Message Type	51
Notifications.....	52
Auto-dismiss Alert Notifications	57
Rule-based Alert:.....	57
Event-based Alert:.....	61
Alerts4Dynamics Logs	78
Notify Failure Configuration	78
Contact Us.....	79

Introduction

Alerts4Dynamics is a productivity app for Microsoft Dynamics 365 CRM which enables managers to schedule and manage alerts in Dynamics 365 CRM to notify users about the updates in CRM, due invoices, reminder to send quotes, etc. Managers can define target audience and send them priority based alerts and also see which user has read the alert.

Salient 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
- Provision to set up preferences to receive alert notifications as per user's choice
- Provision to configure the alerts as dismissible/non-dismissible
- Provision to configure the alerts as auto dismissible/non-auto dismissible
- Control the display behavior of alerts

Available for: Microsoft Dynamics 365 CRM 9.x and above, Power Apps & CDS.

Deployment: On-Premises and Online.

Security Roles

Three security roles, particularly for **Alerts4Dynamics**, come along with the solution.

1. **Alerts4Dynamics Administrator** – The Administrator is given the privilege for License Registration, Enable Entity Configurations, Read Entity Configuration, Create Alerts, View Alerts of other users and has organization level access of all entities of Alerts4Dynamics.
2. **Alerts4Dynamics Manager** – Alerts4Dynamics Manager can Create Alerts and see status of Read/Dismissed Alerts by users. Also, Alerts4Dynamics Manager can see only those Alerts that are created by him.

- Alerts4Dynamics User** – Alerts4Dynamics user can view notifications and create Record-Based Alerts for the records they own.

Note:

- System Administrator has all the rights that Alerts4Dynamics administrator has.**
- For other than English language, the user must have one of the following roles Alerts4Dynamics User, Alerts4Dynamics Manager or Alerts4Dynamics Admin even if the user is system admin.**

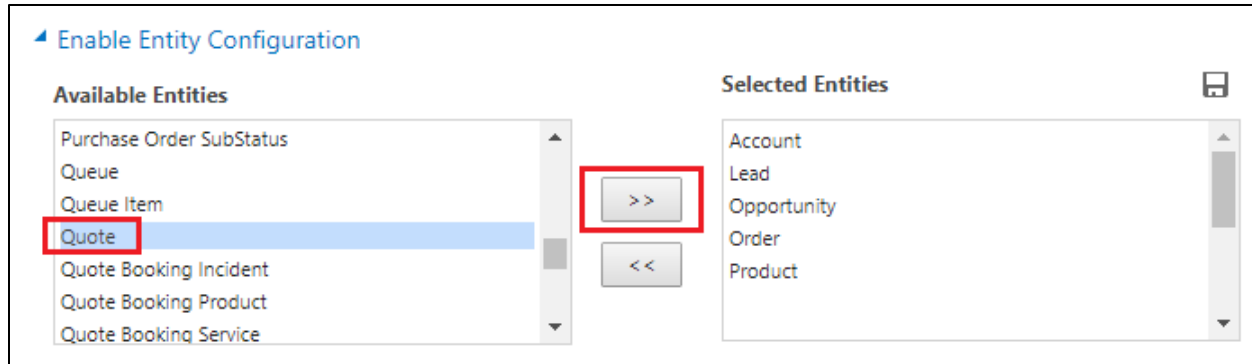
Entity Configuration

In order to create Alerts for a particular entity, Entity Configuration for that entity needs to be enabled.

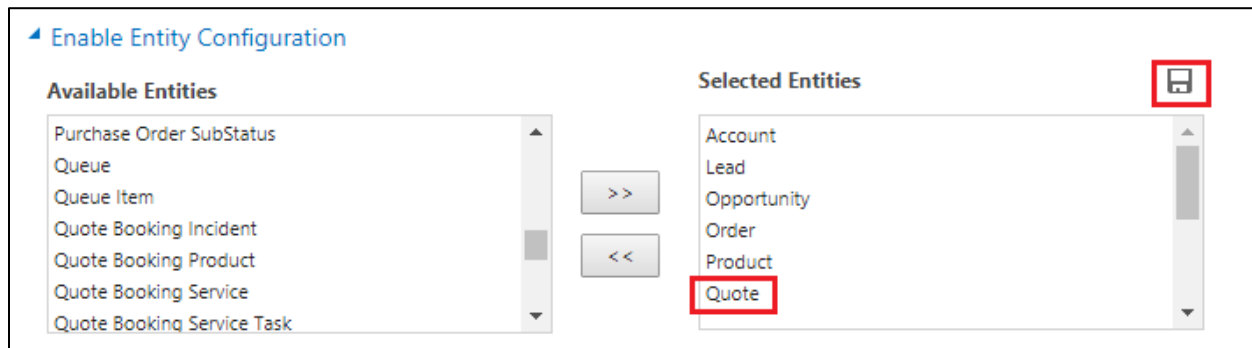
- To enable Entity Configuration navigate to **Alerts4Dynamics App → License Registration → Enable Entity Configuration**

The screenshot displays the Alerts4Dynamics application interface. At the top, there's a header with the logo and navigation links: 'ACTIVATE' and 'SEND REQUEST'. Below this, a status bar shows 'CRM Version: 9.1' and 'User License: 5'. The main content area is divided into sections. The 'Notification' section is expanded, showing 'Notification Details' with fields for 'From' (Alex Wu) and 'To' (John B). Below this, there's a 'License Registration using (*.lic) file' section. The 'Enable Entity Configuration' option is highlighted with a red box. Below this, there are two lists: 'Available Entities' and 'Selected Entities'. The 'Available Entities' list includes: Account, Action Card Role Setting, actioncardregarding, Address, Appointment, Article, and Bookable Resource. The 'Selected Entities' list is currently empty. At the bottom, there's a license information bar showing 'License Start Date: 06/17/2019', 'License End Date: 10/15/2019', and a status of 'Active'.

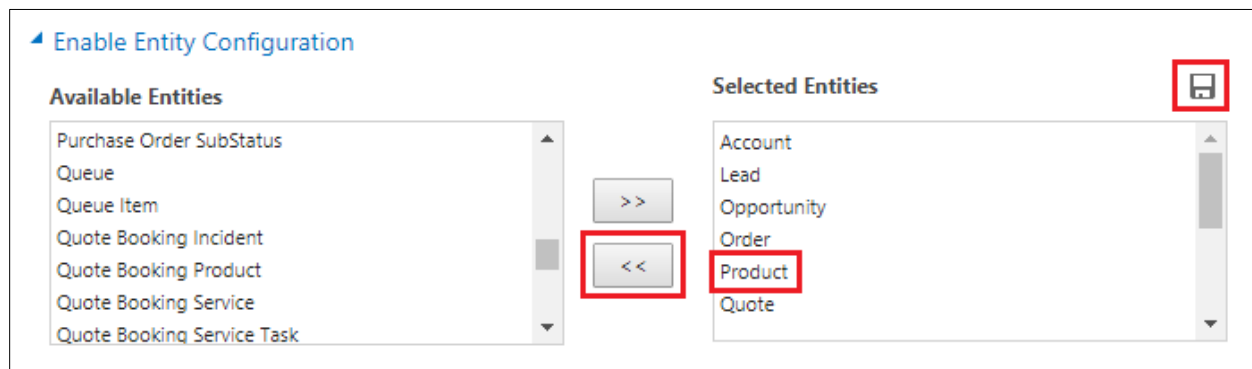
- Users can select the entities from the list of **Available Entities** and move them to the list **Selected Entities**.



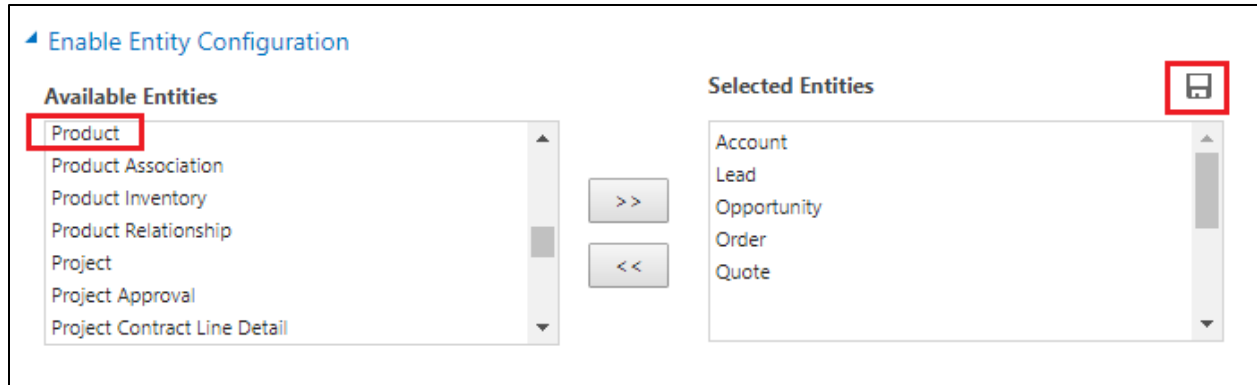
3. Click on **Save** button to enable Entity Configurations for these selected entities.



4. At any time users can disable the Entity Configuration for a particular Entity by removing the entity from **Selected Entities** list.



5. You can see the Product has been removed from **Selected Entities** grid and is now again available in **Available Entities** grid. Click on **Save** in order to retain these settings.



Note: Users cannot create Entity Configurations. They can only enable and disable Entity Configurations for selected entities.

- To view the Entity Configurations go to **Alerts4Dynamics App → Entity Configurations** where all the enabled Entity Configurations can be viewed.

Entity Name	Entity Display Name	Created On
quote	Quote	28-05-2020 17:51
salesorder	Order	28-05-2020 17:50
opportunity	Opportunity	28-05-2020 17:50
lead	Lead	28-05-2020 17:50
invoice	Invoice	28-05-2020 17:50

Alerts

Alerts are created in order to notify the users of a Dynamics 365 CRM organization with relevant information. Four types of Alerts can be created in Alerts4Dynamics viz.

- Record Based:** Create alerts for individual records.
- Rule Based:** Create alerts based on filter conditions.
- Announcement:** Create alerts for organization level announcement.
- Event Based:** Create alert on trigger of an event. (For e.g., On Quote Activation an alert should be created).

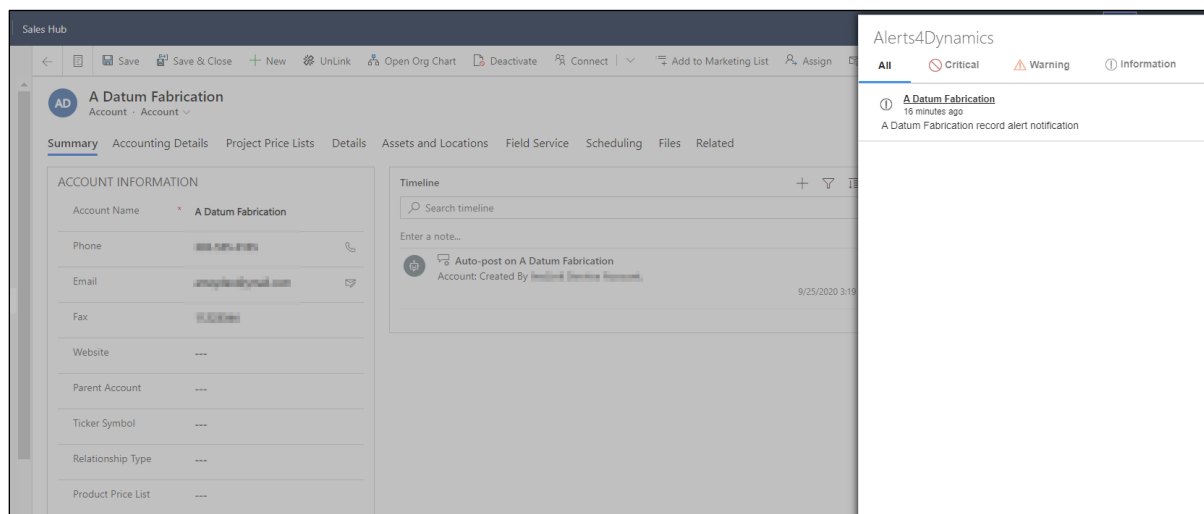
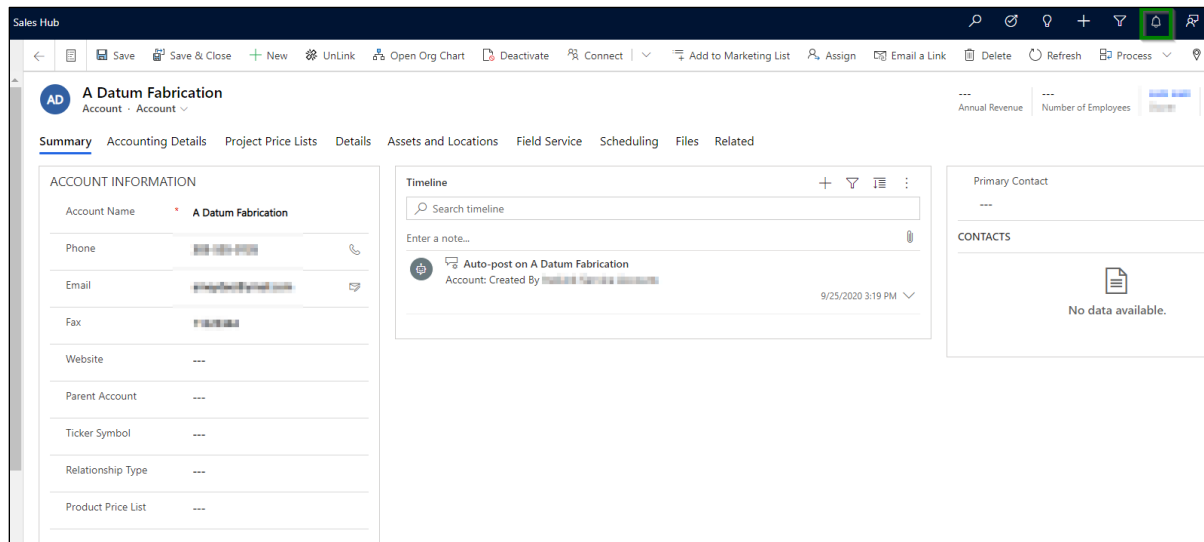
Display of Alerts

Alerts4Dynamics app displays Alert in the following three ways:

- Pop-ups
- Form Notifications – Dialog & Bar
- Email Notifications

Alert as Pop up:

If user sets the alert as '**Pop up**' while configuring the message, an alert will show up only through the global notification bell button. It will not pop-up on opening of the record. User has to click on the bell icon to see the Pop up notification.



Alert as Form notification – Dialog

If user sets the alert as **'Form Notification – Dialog'** then the alert will pop-up after opening a record without having to click on the global notification bell icon.

Record specific alert
Message

Active Status Active Status Reason

General Notification Related

Name * Record specific alert

Message Type * Simple

Alert * Record specific

Process Start Date * 10/5/2020

Notification Message

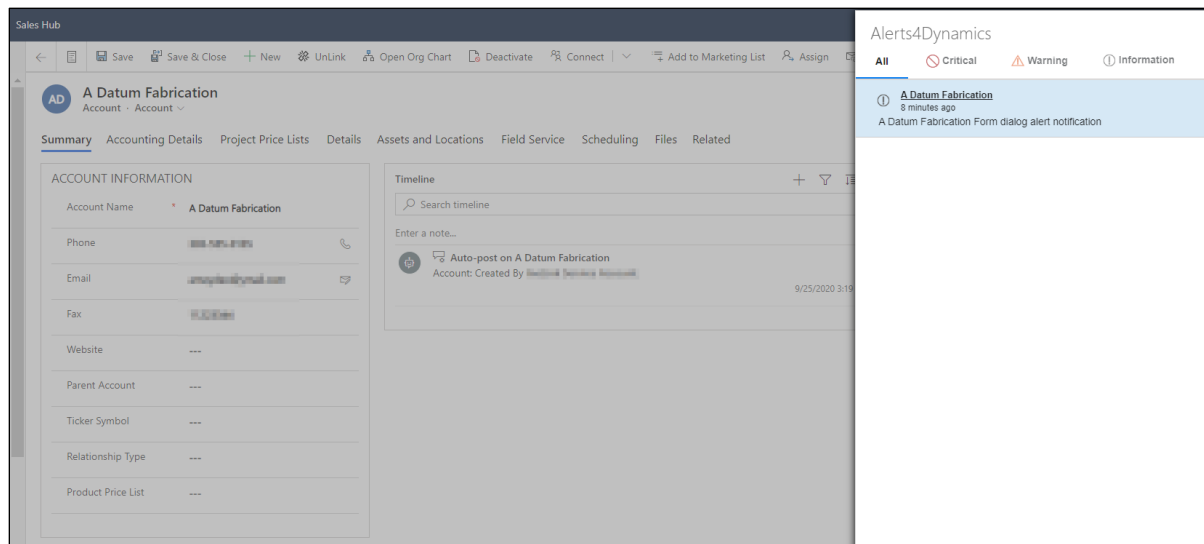
Message Text * (name) Form dialog alert notification Language * English

Notification Configuration

Alert As * Form Notification Display As * Dialog

Display Until * --- Alert Level * Information

Is Dismissible Yes



Note: An alert will be displayed through the global notification bell button only if checked from within the context of the record.

Alert as Form notification – Bar

If user selects **'Display As'** option as **'Bar'** then an alert will be displayed on the top of the record in the form of bar.

Alerts4Dynamics – User Manual

Record specific alert
Message

Active Status Active Status Reason

General Notification Related

Name * Record specific alert

Message Type * Simple

Alert * [Record specific](#)

Process Start Date * 10/5/2020

Notification Message

Message Text * (name) Form bar alert notification Language * English

Notification Configuration

Alert As * Form Notification

Display As * Bar

Display Until ---

Alert Level * Information

Is Dismissible Yes

Save Save & Close + New UnLink Open Org Chart Deactivate Connect | Add to Marketing List Assign Email a Link Delete Refresh Process Geo Code

A Datum Fabrication Form bar alert notification

A Datum Fabrication
Account - Account

Summary Accounting Details Project Price Lists Details Assets and Locations Field Service Scheduling Files Related

ACCOUNT INFORMATION

Account Name * A Datum Fabrication

Phone

Email

Fax

Website

Parent Account

Ticker Symbol

Relationship Type

Product Price List

Timeline

Search timeline

Enter a note...

Auto-post on A Datum Fabrication
Account: Created By [Name] [Name]
9/25/2020 3:19 PM

Primary Contact

CONTACTS

No data available.

Note: An alert will be displayed through the global notification bell button only if checked from within the context of the record.

Alert as Email Notification

If the user sets alert as **'Email Notification'** then the alerts will be notified to the users through an email.

Microsoft Dynamics 365 Andy Johnson bak900

FILE ADVANCED FIND LIST TOOLS

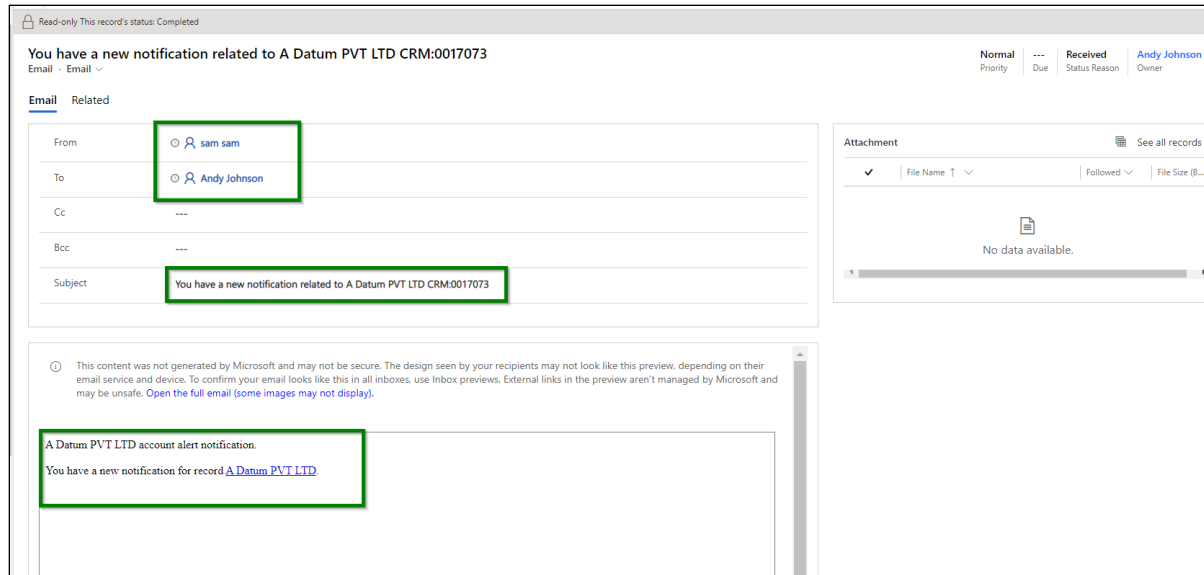
EMAIL MESSAGES

New Email Edit Show As ~ Delete Email Add to Queue Connect ~ Unfollow Share Assign Email Messages Copy a Link Run Workflow Start Dialog Run Report Excel Templates Word Templates Export Email Messages Export Selected Records

Records Collaborate Process Data

From Subject Regarding Priority Actual End

sam sam You have a new notification related to A Datum PVT LTD CRM:0017073 Normal 10/6/2020



Set User Preference

Alerts4Dynamics gives a provision of setting up the preferences to receive an alert which completely leaves it to the users to choose how they want to receive an alert.

Scenario 1:

Admin configures an alert as '**User Preference**'. Let's say an admin does not have any specific preference to receive an alert.

Admin – No preference

But there are another two users having a preference to receive an alert in the following manner:

User 1 – Email Notification

User 2 – Pop up

Outcome:

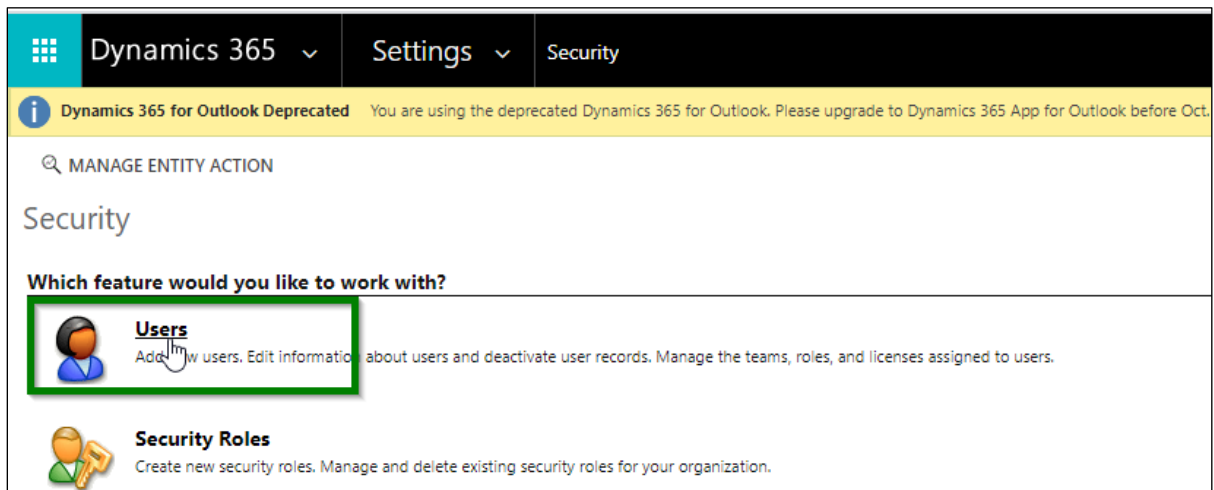
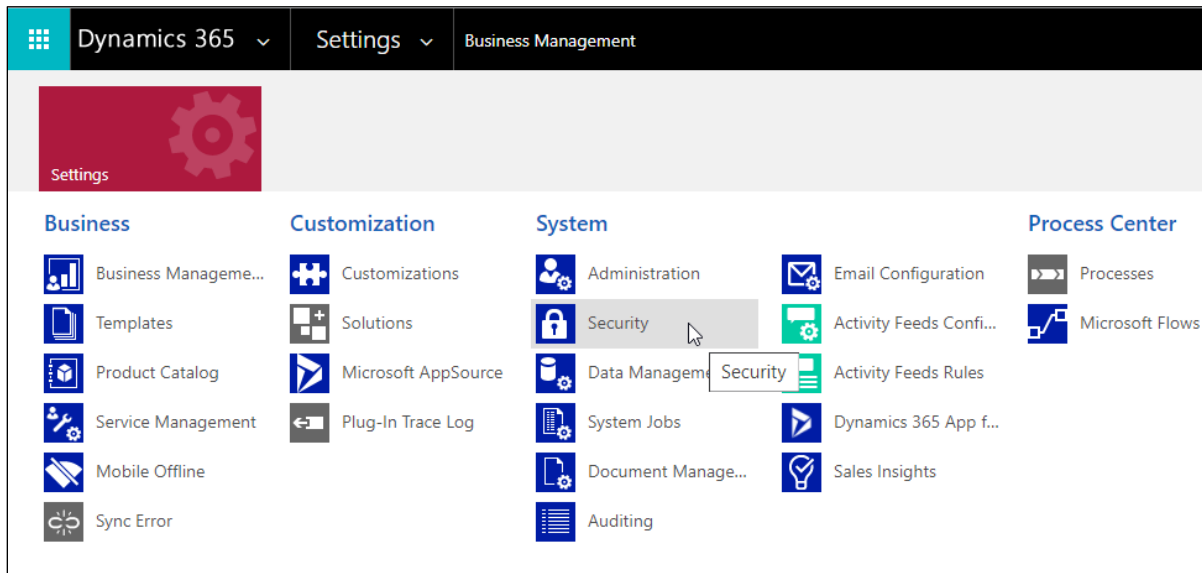
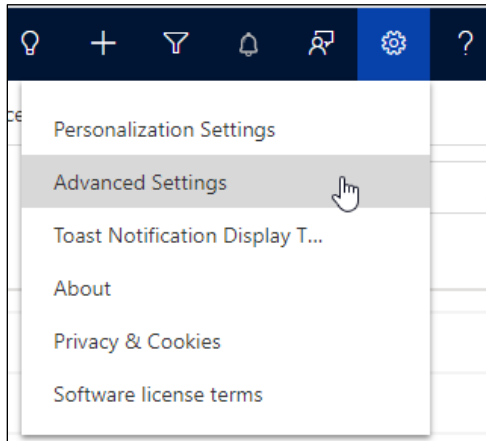
Admin will not be able to see an alert since an alert is configured as only '**User Preference**' and admin did not set any preference to receive an alert.

User 1 will receive an alert only through **Email**.

User 2 will be able to see an alert only as a **Pop up**.

Steps to set User Preference


- 1) Navigate to **Advanced settings** → **Settings** → **Security** → **Users**.



2) Open the user record.

[illegible]

3) **For Admin** - Do not set any preference (make sure it is **blank**).

 USER ▾

sam sam ▮

! The information provided in this form is viewable by the entire organization.

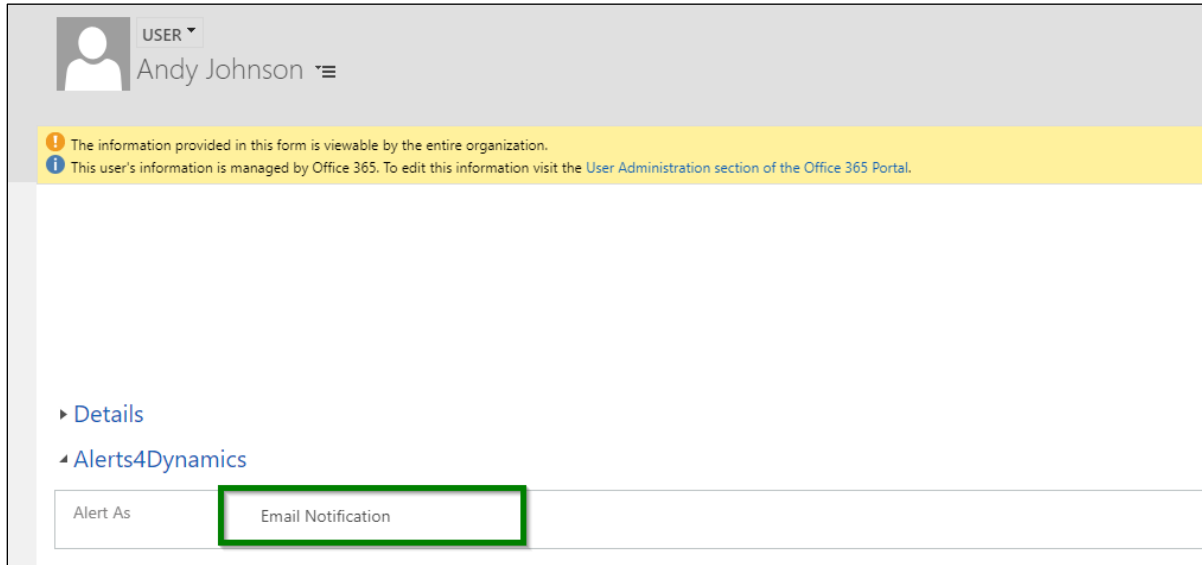
i This user's information is managed by Office 365. To edit this information visit the [User Administration](#) section of the Office 365 Portal.

▸ Details

▾ Alerts4Dynamics

Alert As

For User 1 – Set the preference as 'Email Notification'.



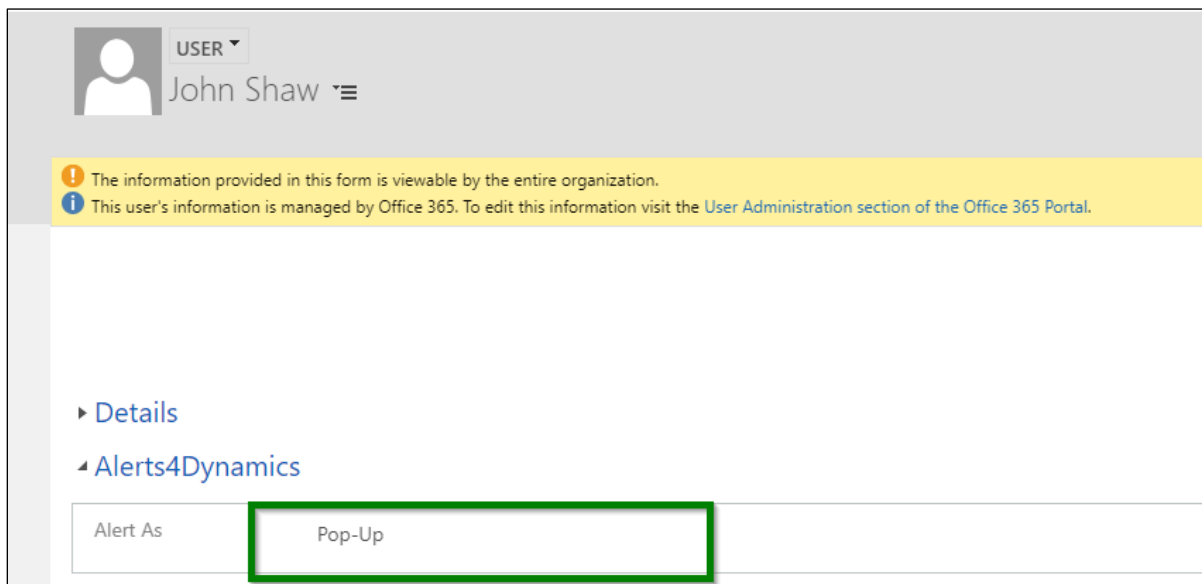
USER ▾
Andy Johnson ☰

⚠ The information provided in this form is viewable by the entire organization.
ℹ This user's information is managed by Office 365. To edit this information visit the [User Administration](#) section of the Office 365 Portal.

▸ Details
▾ Alerts4Dynamics

Alert As Email Notification

For User 2 – Set the preference as 'Pop up'.



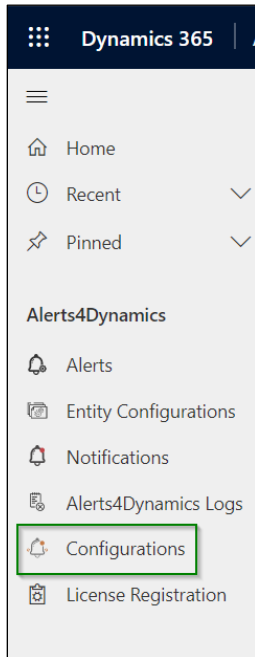
USER ▾
John Shaw ☰

⚠ The information provided in this form is viewable by the entire organization.
ℹ This user's information is managed by Office 365. To edit this information visit the [User Administration](#) section of the Office 365 Portal.

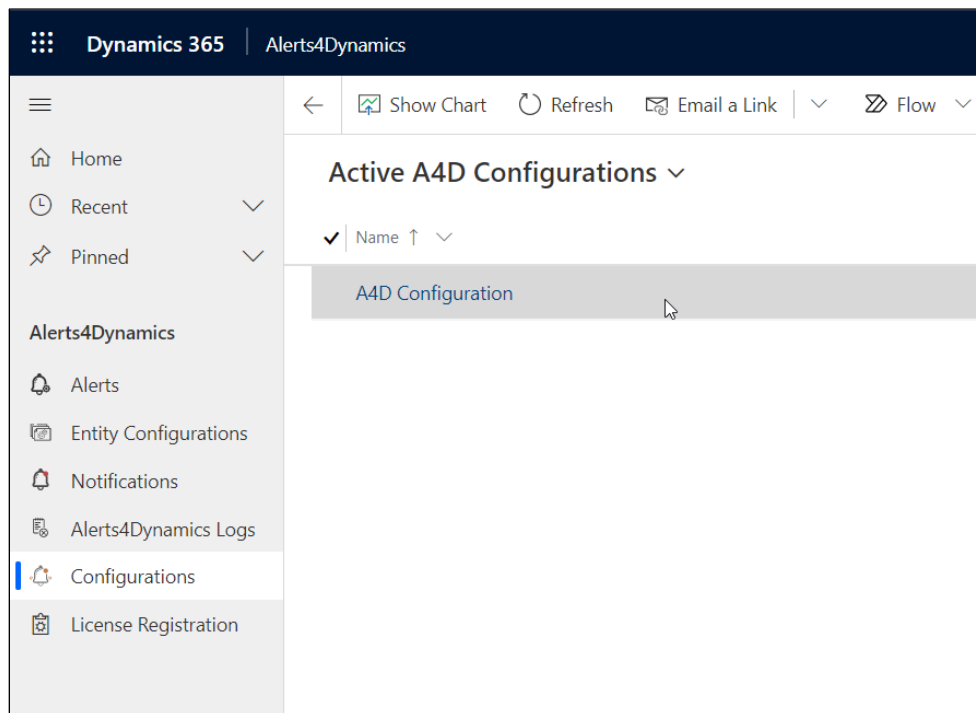
▸ Details
▾ Alerts4Dynamics

Alert As Pop-Up

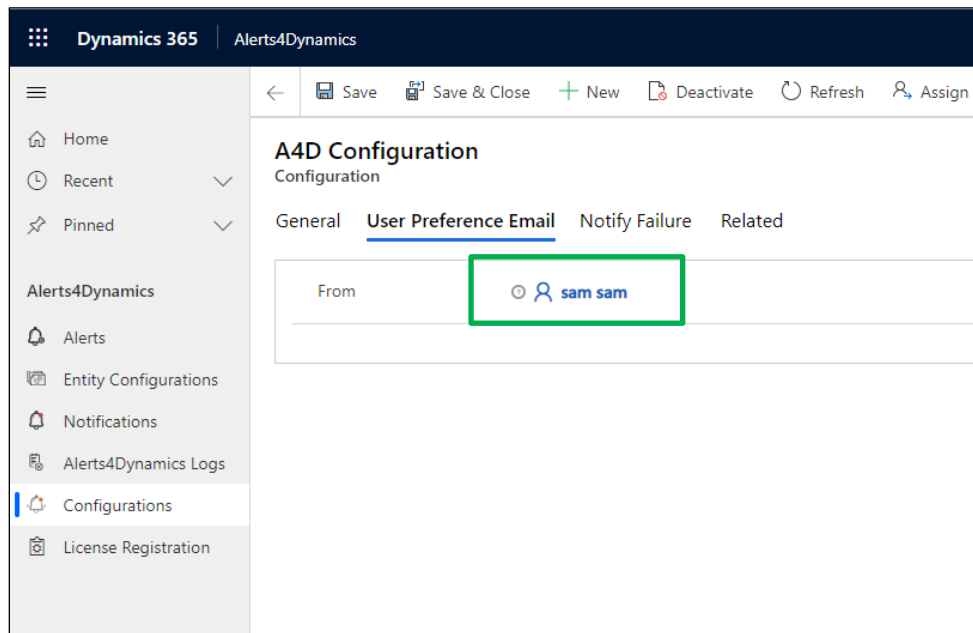
- 4) Next, select user from whom an email is to be sent as **'From'** in Alerts4Dynamics configurations.
For this, navigate to **Alerts4Dynamics app → Configurations**.



- 5) Open the configuration record.



- 6) Select the user (this is the user from whom an alert will be sent via email to that user who has preference to receive an alert set as 'Email Notification').



- 7) Configure and activate the message.

Alert as user preference

Message

Active Status Active Status Reason

General Notification Related

Name * Alert as user preference

Message Type * Simple

Alert * Alert with user preference

Process Start Date * 10/6/2020

Notification Message

Message Text * (name) account alert notification Language * English

Notification Configuration

Alert As * User Preference Alert Level * Information

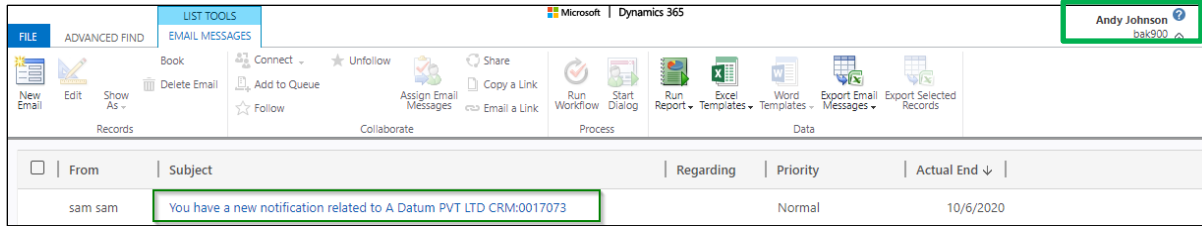
Display Until ---

Is Dismissible Yes

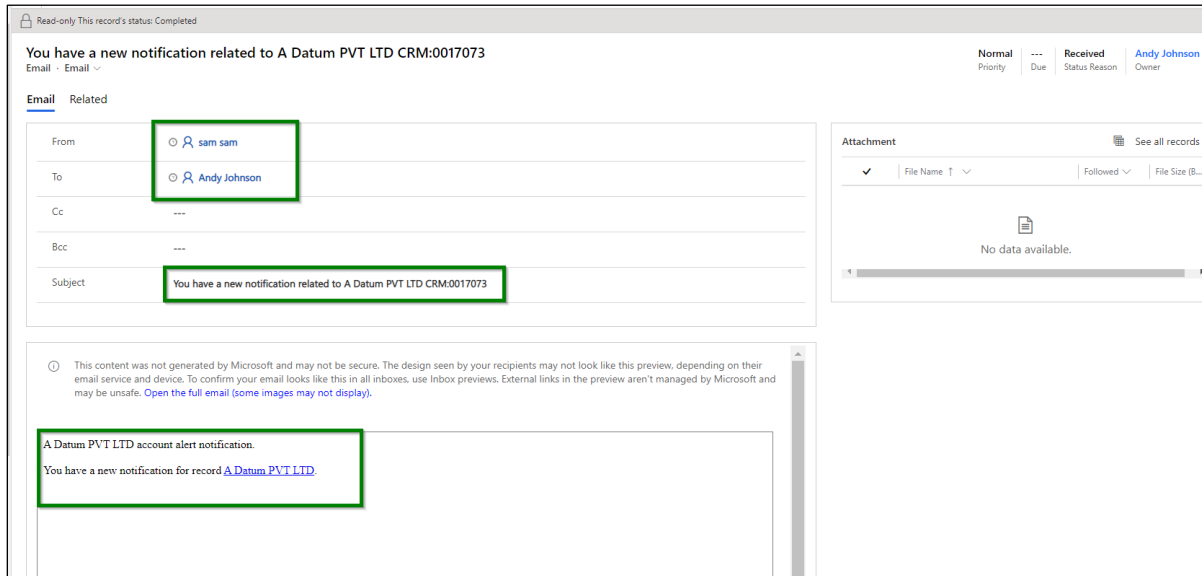
- 8) Once the message is activated:

User 1 will receive an alert only through an **Email**.

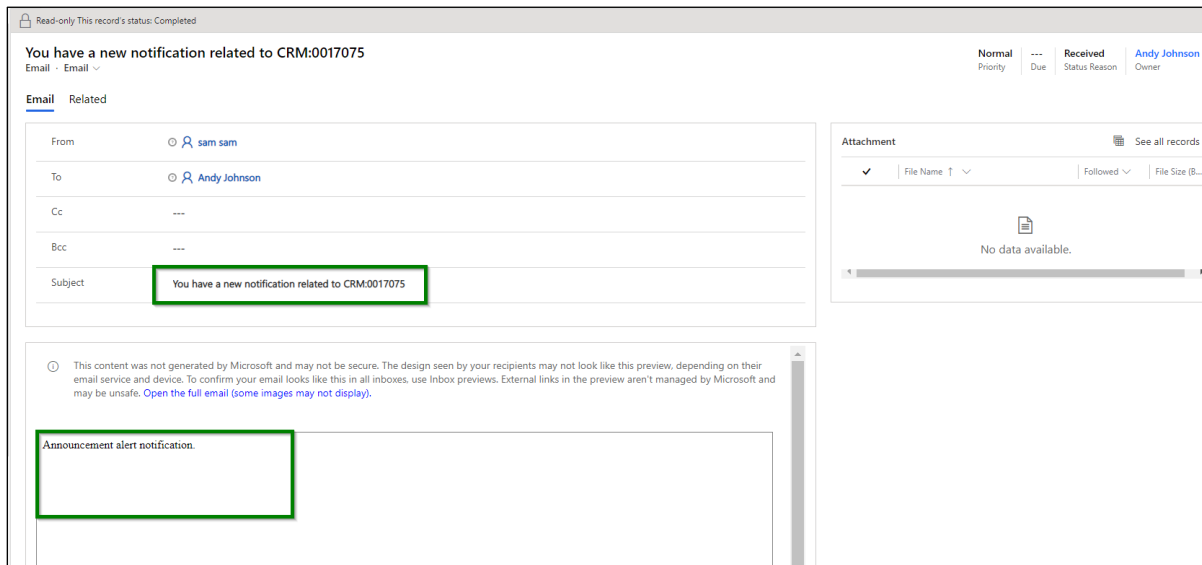
Alerts4Dynamics – User Manual



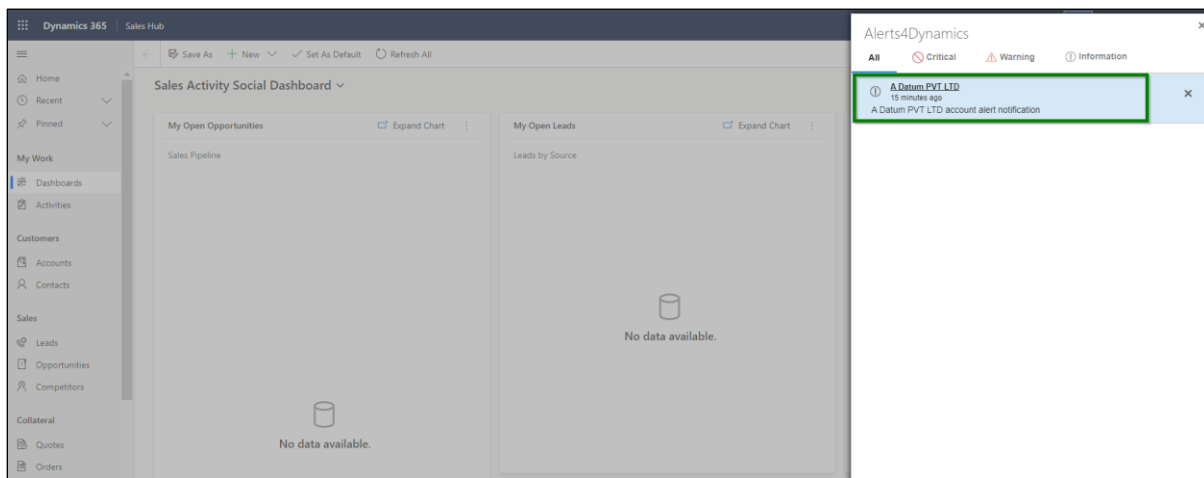
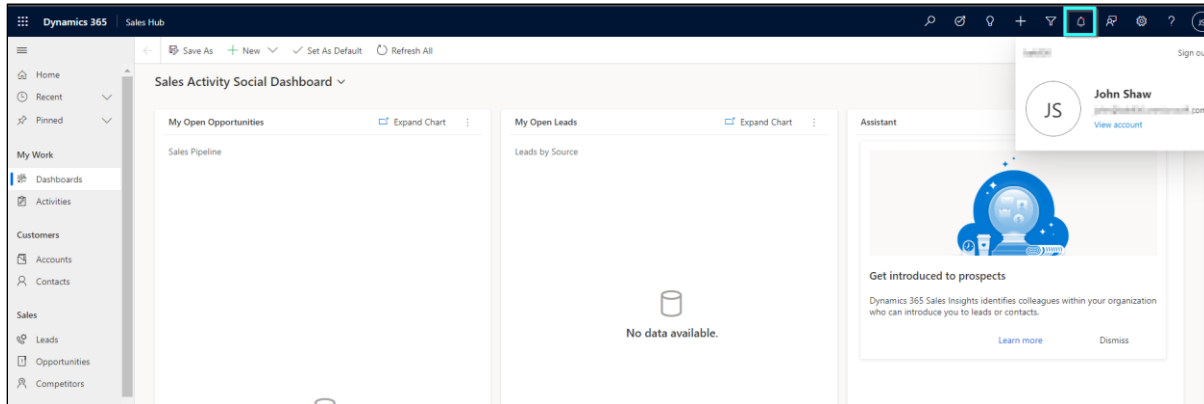
The user will be directed to the record page by clicking on the record link available in the email body.



In case of an announcement alert being sent through an email, there will be no such link since announcements are not record specific.



User 2 will get an alert only through **Pop up**.



Scenario 2:

Admin configures an alert as both '**User Preference**' and '**From Notification – Dialog**'. Let's say an admin does not have any specific preference to receive an alert.

Admin – No preference

But there are another two users having a preference to receive an alert in the following manner:

User 1 – Email Notification

User 2 – Pop up

Outcome:

Admin will be able to see an alert only as a **'Form Notification – Dialog'**.

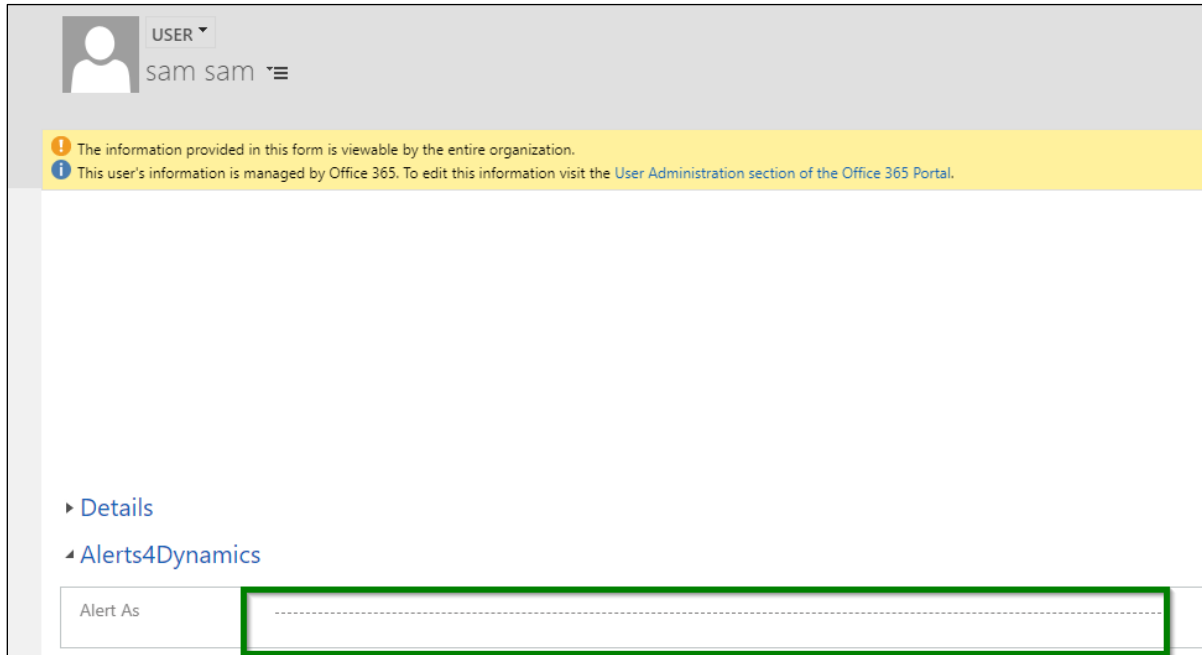
User 1 will receive an alert through an **'Email'** as well as **'Form Notification – Dialog'**.

User 2 will be able to see an alert as both **'Pop up'** and **'Form Notification – Dialog'**.

Steps to set User Preference

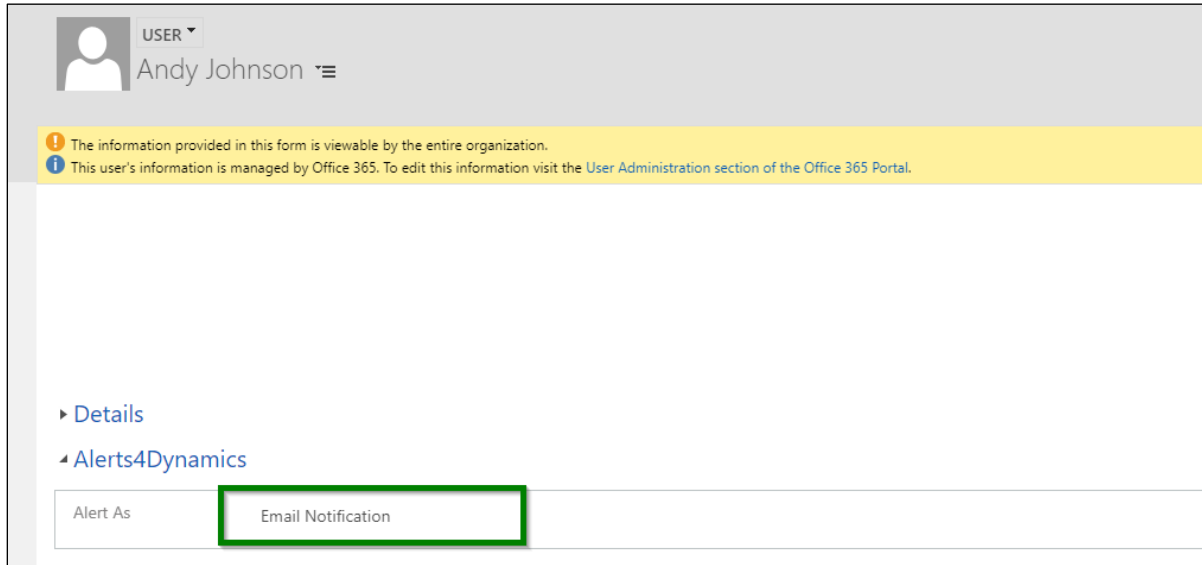
- 1) Set individual user preferences for an alert.

Admin – No preference:



The screenshot shows a web interface for setting user preferences. At the top, there is a header bar with a user profile icon, a dropdown menu labeled 'USER', and the text 'sam sam' followed by a hamburger menu icon. Below the header, there is a yellow warning banner with two messages: 'The information provided in this form is viewable by the entire organization.' and 'This user's information is managed by Office 365. To edit this information visit the [User Administration section of the Office 365 Portal.](#)'. The main content area is mostly blank. On the left side, there is a sidebar with two links: 'Details' and 'Alerts4Dynamics'. The 'Alerts4Dynamics' link is highlighted. Below the sidebar, there is a form field labeled 'Alert As' with a green border, which is currently empty.

User 1 – Email Notification:



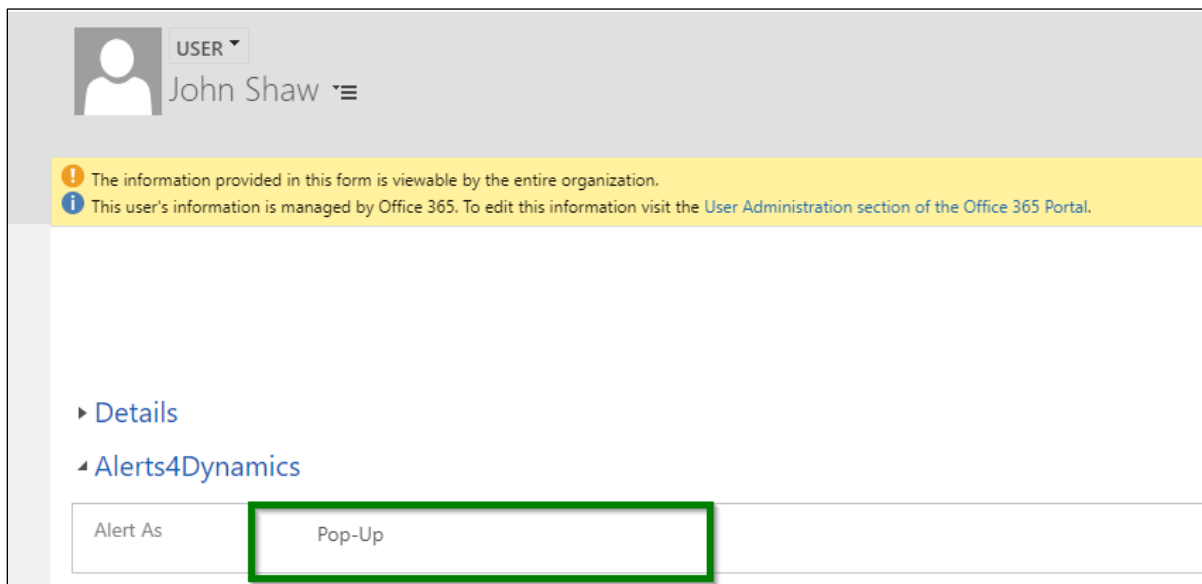
USER ▾
Andy Johnson ☰

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i This user's information is managed by Office 365. To edit this information visit the [User Administration](#) section of the Office 365 Portal.

▸ Details
▾ Alerts4Dynamics

Alert As	Email Notification
----------	--------------------

User 2 – Pop up:



USER ▾
John Shaw ☰

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▸ Details
▾ Alerts4Dynamics

Alert As	Pop-Up
----------	--------

- 2) Configure the alert message.

Alerts4Dynamics – User Manual

Alert as user preference and form notification - dialog

Message

Active Status Active Status Reason

General Notification Related

Name * Alert as user preference and form notification - dialog

Message Type * Simple

Alert * [Alert with user preference](#)

Process Start Date * 10/6/2020

Notification Message

Message Text * (name) alert notification Language * English

Notification Configuration

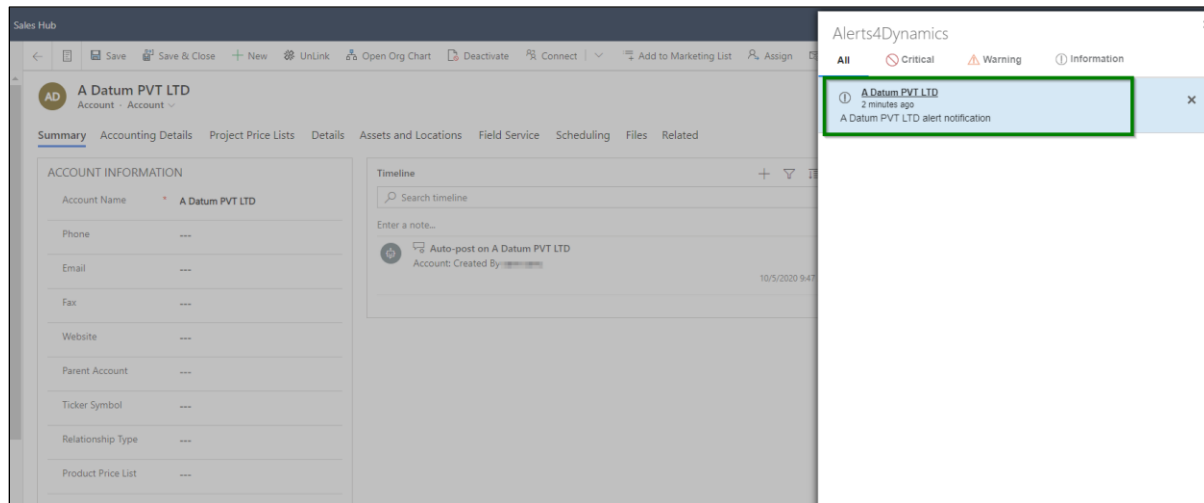
Alert As * **Form Notification, User Preference** Display As * **Dialog**

Display Until * --- Alert Level * Information

Is Dismissible Yes

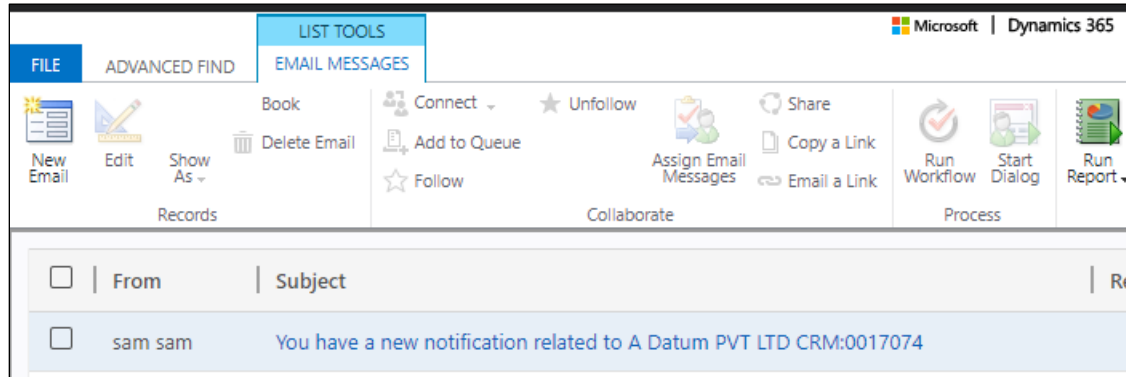
3) Once the message is activated;

Admin will be able to see an alert only as a **Form Dialog**.

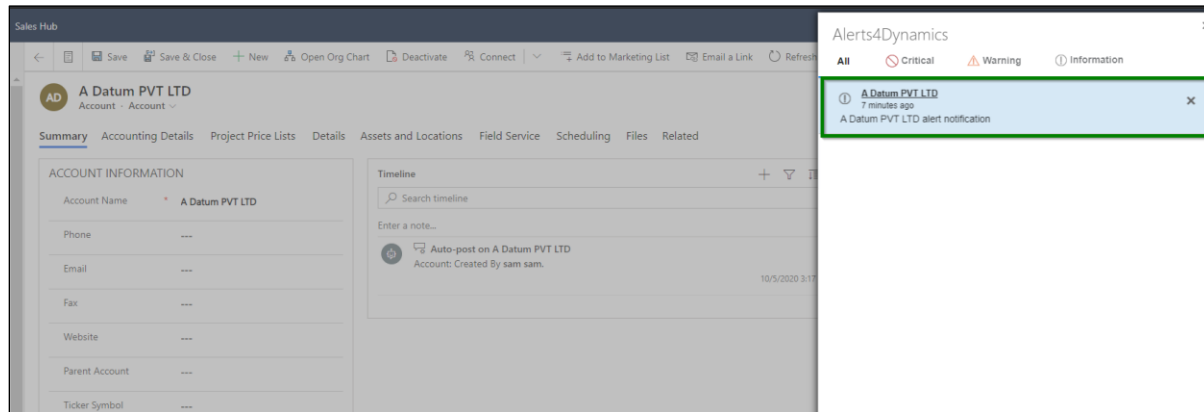


User 1 will be notified through both **Email** as well as **Form Dialog**.

As Email Notification:

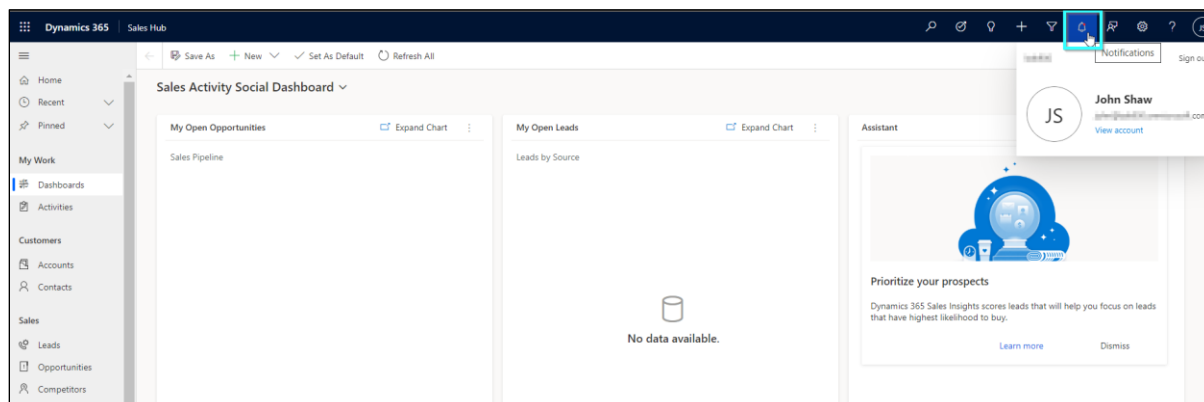


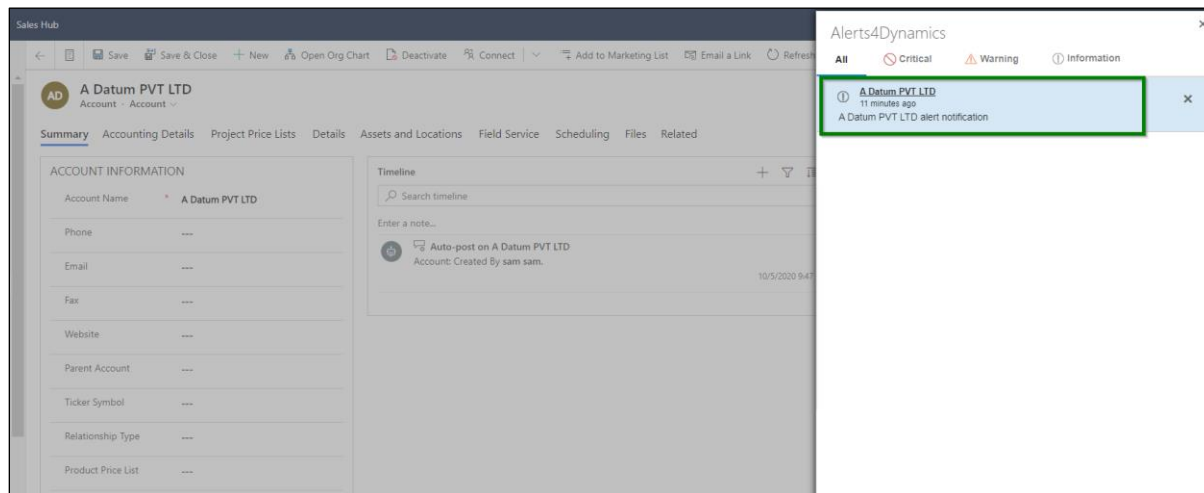
As Form Dialog:



User 2 will be able to see an alert both as **Pop up** and **Form Dialog**.

As Pop up:



As Form Dialog:

Note: - User preference and Email notification cannot be used together.

New Message Active Status New Status Reason

General **Notification**

Name	Alert
Message Type	Simple
Alert	Rule based alert
Process Start Date	10/6/2020
Process End Date	

Notification Configuration

Alert As	Email Notification, User Preference Email Notification and User Preference cannot be selected together.	Alert Level	Information
		Email Workflow	ActivityPropagation

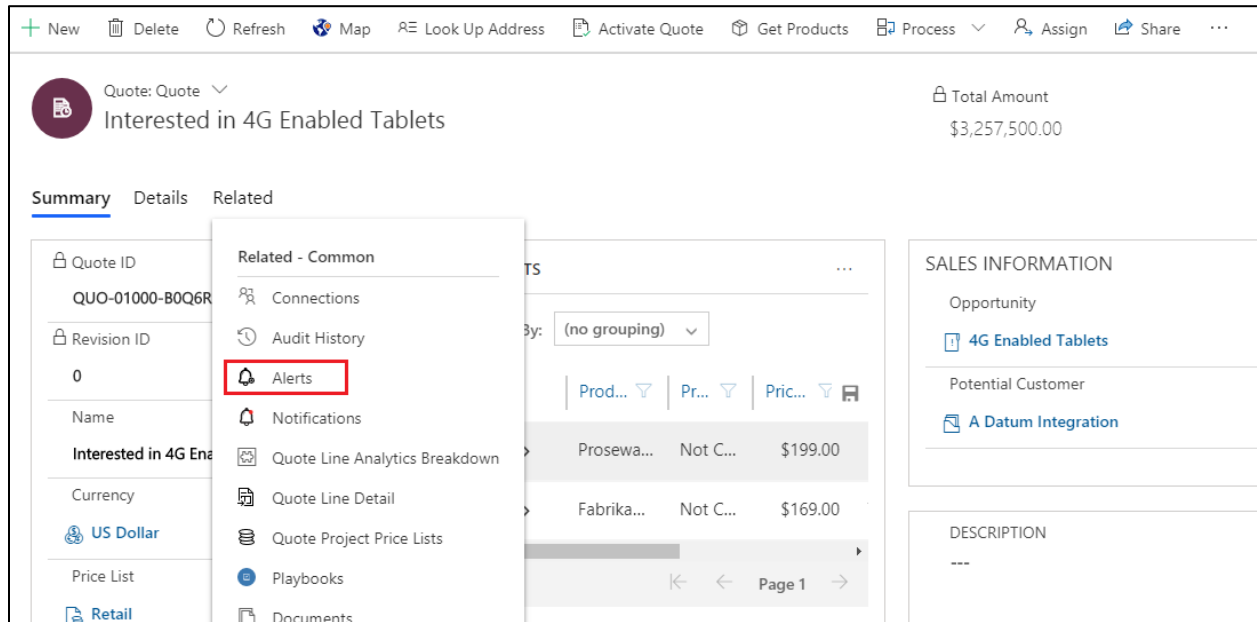
Reason:

User is required to create a workflow for alert as **'Email Notification'** where they will decide which of the users to be picked as an audience of this email notification. In addition to this, no separate notification is created for an alert as **'Email Notification'**, it would be sent directly as email.

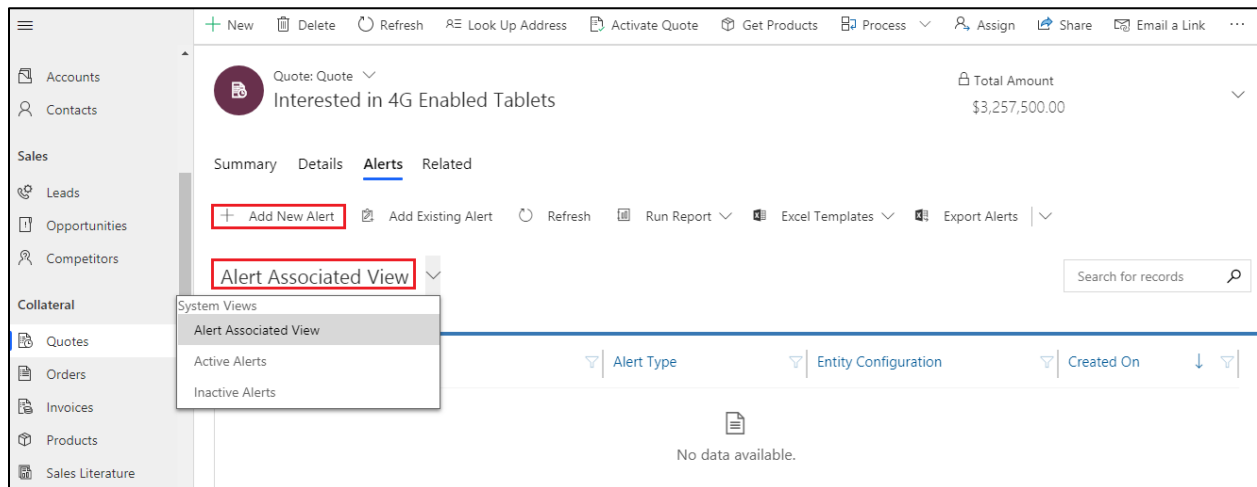
Record Based Alerts

Record Based alerts are created for individual records. For instance, if a Quote is about to expire then an alert for that Quote can be created or if an Invoice is due then an alert for that specific Invoice can be created.

1. To create Record Based Alerts, navigate to the **Entity → Record → Related → Alerts**. For instance, if you want to create Alert for a Quote **Interested in 4G Enabled Tablets** go to **Quote** entity → record, **Interested in 4G Enabled Tablets** → **Related** tab → **Select Alerts**.



2. Once you are in **Alerts** tab you can view all the alerts associated with that individual record. You can create a new alert using **Add New Alert** button.



3. On clicking **Add New Alert** button you are redirected to a new alerts page.

4. Add the **Name** of the alert and Save (**Alert Type** is auto-set to **Record Based** following this procedure). Once the **Alert** is created, next step would be to create **Message** against it. To know how to **Add New Message** skip to [Message](#) section.

Rule Based Alerts

Rule Based alerts are designed for specific conditions. There are two types of Rule Based Alerts:

1. **Simple:** Create Alerts based on the View of an entity.
2. **Advanced:** Create alerts based on filter criteria or conditions (conditions defined in Fetch XML).

To create Rule Based alerts go to **Alerts4Dynamics App** → **Alerts** → **New** and set the **Alert Type** as **Rule Based**. Select the **Rule Mode** as **Simple** or **Advanced**.

Fill the fields:

- Name:** Enter a suitable name for this Alert.
- Alert Type:** Select the type of alert you are creating. Here you have the option to choose **Rule Based** or **Announcement**. Select **Rule Based** from the dropdown.
- Entity Configuration:** Select the Entity Configuration.
- Rule Mode:** Select Simple or Advanced based on your requirement. (This option only appears for Rule Based alerts.)

Simple Alerts

- Simple alerts are rule-based alerts created based on **System Views** related to the entity whose Entity Configuration has been selected. Select the **View** for which Alert has to be created.

b) Select the **Interval**:

- **Poll Interval:** This is the duration after which the system checks if any new record has been created based on the condition provided. (In above case, based on the condition of the selected view.)

The workflow can run:

- Only Once:** The alerts for all the records in selected view are created Only Once.
 - X Hour(s):** New records in the defined condition are checked for in every X Hour(s). If new records are found based on the defined condition, new notifications are created for them.
 - X Day(s):** New records in the defined condition are checked for in every X Day(s). If new records are found based on the defined condition, new notifications are created for them.
 - X Week(s):** New records in the defined condition are checked for in every X Week(s). If new records are found based on the defined condition, new notifications are created for them.
 - X Month(s):** New records in the defined condition are checked for in every X Month(s). If new records are found based on the defined condition, new notifications are created for them.
- **Interval:** This is a numeric value of **X** in the Poll Interval.

c) After entering values in the Alerts field click on **Save** and the alert will be created. Create new message from the **Messages** subgrid. To know how to **Add New Message** skip to [Message](#) section.

Advanced Alerts

Alerts can be created based on conditions.

You have to enter your query in **Fetch XML**. For eg. If you want to create alerts for all the Invoices whose **Total Amount** is greater than or equal to 1000, you have to enter the **Fetch XML** for it. Below is the Fetch XML for **Total Amount** in **Invoices** greater than or equal to 1000.

```
<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">
  <entity name="invoice">
    <attribute name="name" />
    <attribute name="customerid" />
    <attribute name="statuscode" />
    <attribute name="totalamount" />
    <attribute name="invoiceid" />
    <order attribute="name" descending="false" />
    <filter type="and">
      <condition attribute="totalamount" operator="ge" value="1000" />
    </filter>
  </entity>
</fetch>
```

- a) To create an **Advanced Alerts**, select **Rule Mode** as **Advanced** and enter the **Fetch XML** as per your conditions.

Save Save & Close Delete Refresh Share Email a Link Flow Word Templates

Home Recent Pinned

Alerts4Dynamics

Alerts Entity Configurations Notifications Alerts4Dynamics Logs Configurations License Registration

Invoice ≥ 1000
Alert

General Related

Name * Invoice ≥ 1000

Alert Type * Rule Based

Entity Configuration * invoice

Rule Mode * Advanced

Fetch XML * `<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">
<entity name="invoice">
<attribute name="name" />`

b) After creating the Alert, you can add a message to it. To know how to **Add New Message** skip to [Message](#) section.

Save Save & Close Delete Refresh Share Email a Link Flow Word Templates Run Report

Home Recent Pinned

Alerts4Dynamics

Alerts Entity Configurations Notifications Alerts4Dynamics Logs Configurations License Registration

Invoice ≥ 1000
Alert

General Related

Interval

Poll Interval * X Day(s) Interval * 7

Messages

+ New Message

✓ Name Message Text Alert As Alert Level Process Start Date

Announcement

Announcement is created at organization level. These alerts are not dependent on any condition, view or record. They are independent alerts that can be viewed from anywhere in the CRM.

To create Announcement go to **Alerts4Dynamics App → Alerts → New**

- i. **Name:** Enter suitable name for Alert.
- ii. **Alert Type:** Select Announcement.

After the Alert is created you can add a message associated with it in **Add New Message** tab. To know how to **Add New Message** skip to [Message](#) section.

The screenshot shows the Alerts4Dynamics interface. On the left is a sidebar with navigation options: Home, Recent, Pinned, Alerts4Dynamics, Alerts, Entity Configurations, Notifications, Alerts4Dynamics Logs, Configurations, and License Registration. The main area displays the 'Holiday' alert configuration. The 'General' tab is selected, showing fields for 'Name' (Holiday) and 'Alert Type' (Announcement). Below this is a 'Messages' section with a table header: Name, Message Text, Alert As, Alert Level, and Process Start Date. A '+ New Message' button is highlighted with a red box in the top right corner of the Messages section.

Event Based Alerts

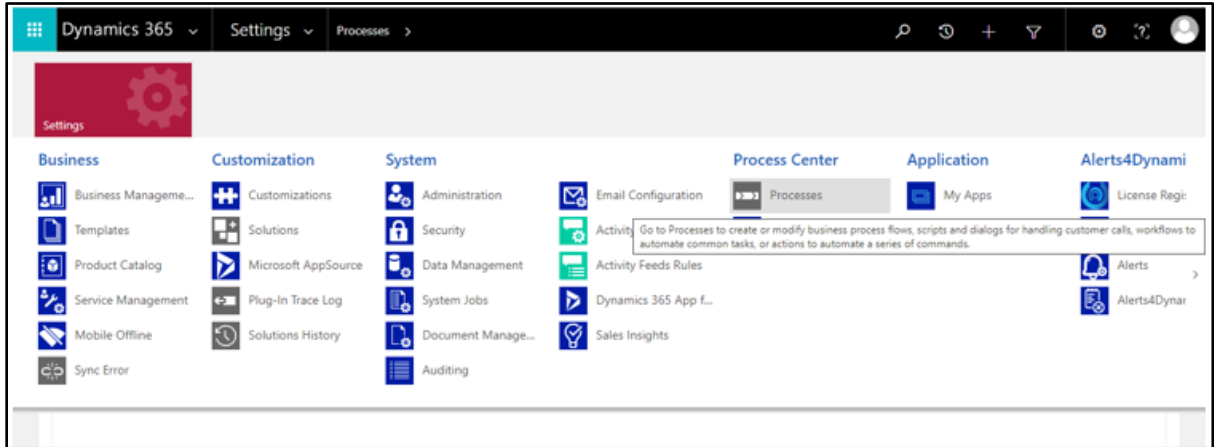
Alerts4Dynamics gives user a provision to show an alert with respect to any event that happens in the CRM. For example, user wants an alert to be shown automatically once a new record is created within the selected entity. This can now be easily achieved using **'Event Based Alert'** feature of Alerts4Dynamics.

Example 1: Let's consider that the user wants an alert notification to be shown to all users in CRM once a new Account or Lead record is created. To achieve this, user has to follow the steps given below:

- 1) First and foremost, enable **'Account'** entity through license registration. Users can enable any other entity from the available list for which they want to create an alert.

The screenshot shows the 'Enable Entity Configuration' section of the Alerts4Dynamics interface. It includes fields for 'CRM Version' (9.1) and 'User License' (5). The 'Notification' section has fields for 'From', 'To', and 'Notification Inter.' (Once a day, Once a week, Once a month). The 'License Registration using (*.lic) file' section is also visible. The 'Enable Entity Configuration' section shows a list of 'Available Entities' and a 'Selected Entities' list. The 'Account' entity is highlighted in the 'Selected Entities' list, and a green box highlights the 'Add' button (represented by a right arrow) used to move entities from the available list to the selected list.

2) Once entity is enabled, navigate to Advanced Settings → Processes → Create New process.



3) Fill the following details and click on **OK**.

- Enter a relevant name for the process
- Select the category as '**Workflow**' and Entity as '**Account**'.

Create Process

Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.

Process name: * On create of new record

Category: * Workflow Entity: * Account

☒ Run this workflow in the background (recommended)

We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!

Type: ☒ New blank process ☐ New process from an existing template (select from list):

Template Name ↑	Primary Entity	Owner

Properties

OK Cancel

- 4) Select the event on which you want the notification to be created :

We are selecting '**Record is created**' checkbox since we want an alert to be displayed for the record that is newly created in the system.

- 5) For creating notification you need to create a record of '**Notification Request**' entity which is custom entity shipped along with the solution.

Please follow the below steps for creating notification request entity record.

Select Add Step → Create Record → Select 'Notification Request' from the dropdown.

- 6) Click on '**Set Properties**'. Here, you will find similar fields necessary for configuration as we do in other types of alerts.

7) Fill in the following details:

- **Name** – Enter some valid name for the Notification Request record.
- **Message text** – Enter some valid text (You can also select dynamic value).

8) Select the above field and click on **'Add'** button to add it in the Message Text field.

9) Click **Ok**. You will see the dynamic value is set to the **'Message Text'** field. Similarly add Dynamic values in **'Name'** field.

10) Fill in the following details:

- **Alert as** - Select only Pop-Up as **'Yes'** and leave rest all blank
- **Alert level** - Warning/Critical/Informational depending on user's requirement
- **For Notification Associated With Field** - You will have to select a dynamic record URL of the entity on which you want to show the notification. In this scenario, we want a notification to be shown on the Account entity, so we will select the Record URL of the Account entity.

11) Click on **'Add'**.

12) For the **'Notification Audiences'** you can select dynamic users like **Owning User** of the record as well as the **Manager of the Owning User** as shown in **Include Users** field.

13) Once details are filled, click on **'Save and Close'** and then activate the workflow by clicking **'Activate'** button.

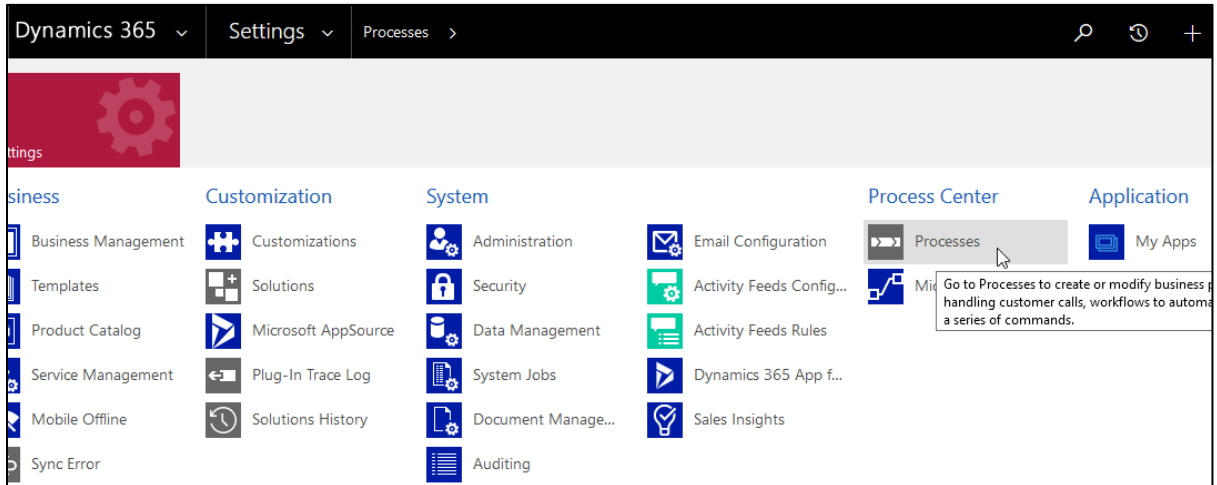
In this way, you can create an event based alert to be shown once a new record is created on the selected entity.

Example 2: Now, let us see how to configure the Event-based alert for the scenarios where the entity on which the notification to be shown is different from the entity where the workflow is triggered and also if you want the notification audience and email audience to be the related records which are in **'One to Many'** or **'Many to Many'** relationships. For **'Many to One'** relationships we can define the audience by using the default form assistant available in OOB workflows.

Let's consider the below scenario:

There is an invoice with a related account which has further multiple associated contacts and user wants to show the notification as well as send an email to these contacts once the invoice is paid. For this, we will configure the workflow as shown below:

- 1) **Navigate to Advanced Settings → Processes → New Process → Fill the fields → Click on OK.**



Create Process

Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.

Process name: *

Category: *

Entity: *

☒ Run this workflow in the background (recommended)

We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!

Type: ☒ New blank process ☐ New process from an existing template (select from list):

Template Name ↑	Primary Entity	Own
<div> <div></div> <div></div> </div>		

- 2) Since we want to trigger an alert on status change event of an invoice (i. e. when invoice is paid), we will enable the **'Record status changes'** checkbox.

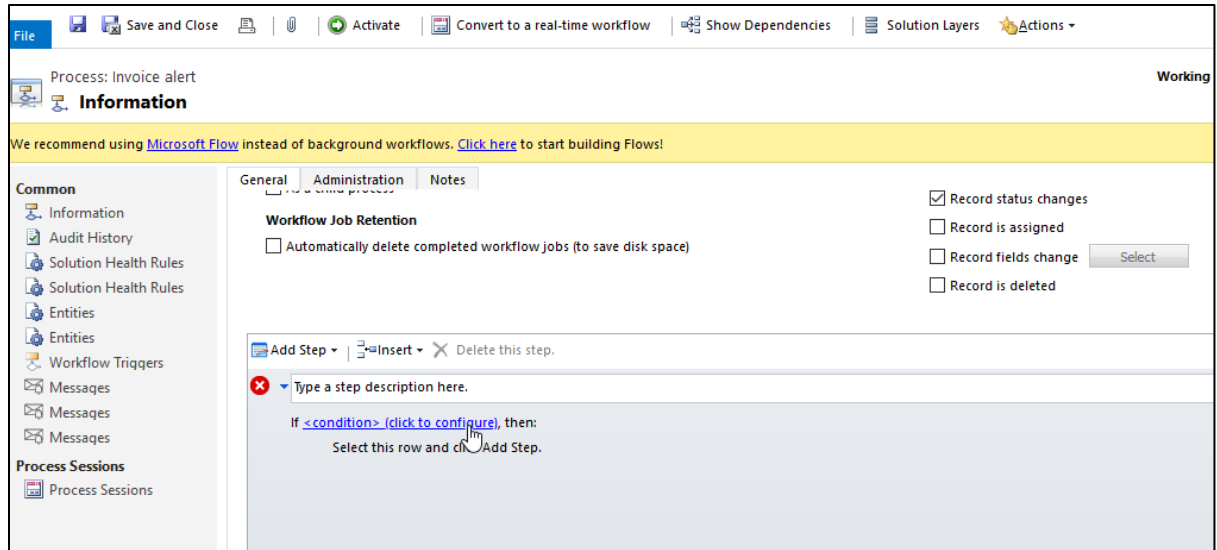
The screenshot shows the 'Process: Invoice alert' configuration window. The 'General' tab is active. The 'Process Name' is 'Invoice alert'. The 'Entity' is 'Invoice' and the 'Category' is 'Workflow'. Under 'Options for Automatic Processes', the 'Record status changes' checkbox is checked and highlighted with a green box. Other options include 'Record is created', 'Record is assigned', 'Record fields change', and 'Record is deleted'. The 'Workflow Job Retention' section has an unchecked checkbox for 'Automatically delete completed workflow jobs (to save disk space)'.

- 3) Now, add a step and check the condition if the invoice is paid.

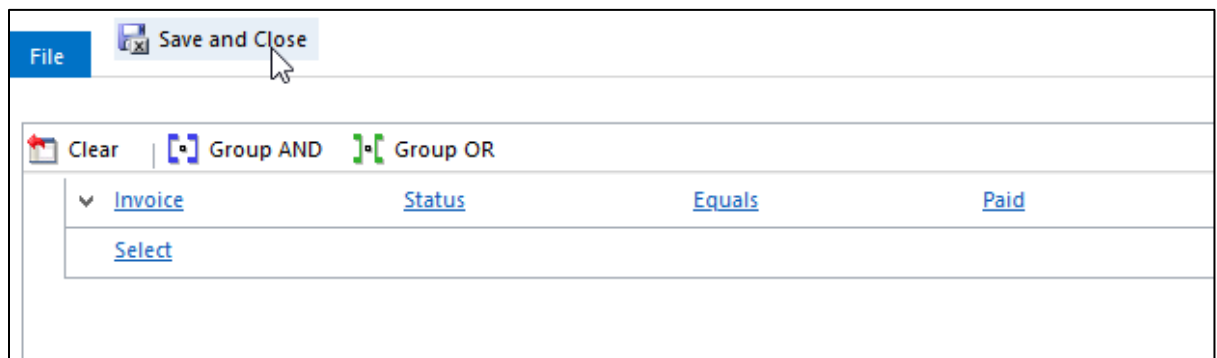
The screenshot shows the 'Process: Invoice alert' configuration window. The 'General' tab is active. The 'Add Step' button is highlighted with a green box. A dropdown menu is open, showing options: 'Stage', 'Check Condition', 'Conditional Branch', 'Default Action', 'Wait Condition', and 'Parallel Wait Branch'. The 'Check Condition' option is highlighted with a green box. The 'Workflow Job Retention' section has an unchecked checkbox for 'Automatically delete completed workflow jobs (to save disk space)'. The 'Options for Automatic Processes' section has the 'Record status changes' checkbox checked.

- 4) Here, we will check the condition whether the invoice status has been paid, you can similarly define any condition.

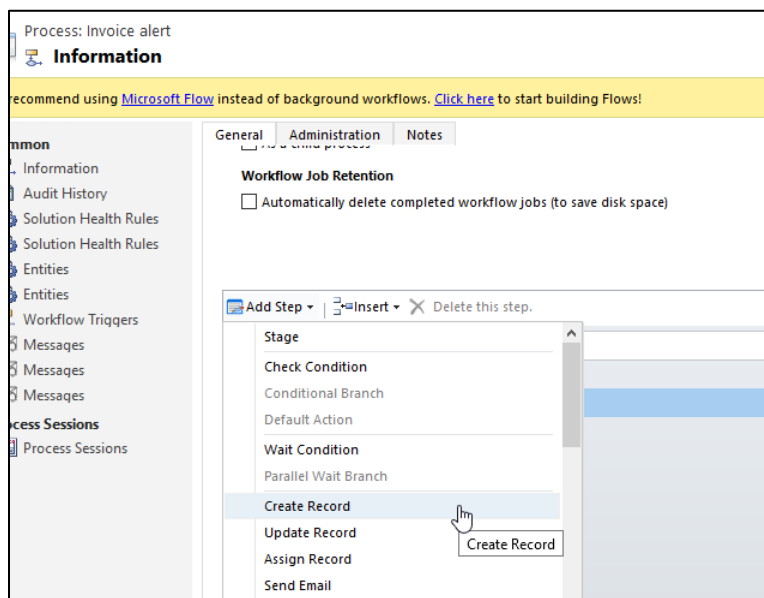
Alerts4Dynamics – User Manual



5) Now click on **'Save and Close'**.



6) Add another step under the above added step and select **'Create Record'**.



7) Select '**Notification Request**' for record creation and click on '**Set Properties**'.

The screenshot shows the Alerts4Dynamics interface for configuring a workflow. The top bar includes options like 'Save and Close', 'Activate', 'Convert to a real-time workflow', and 'Show Dependencies'. The main area is titled 'Process: Invoice alert' and 'Information'. A yellow banner recommends using Microsoft Flow instead of background workflows. The left sidebar lists various components like 'Common', 'Process Sessions', and 'Workflow Trippers'. The main panel shows the 'Workflow Job Retention' section with a checkbox for 'Automatically delete completed workflow jobs (to save disk space)'. Below this, there's a step configuration area with a dropdown menu set to 'Notification Request' and a 'Set Properties' button being clicked by a mouse cursor.

8) Fill the following fields:

- **Name** – Enter some valid name for the message.
- **Message Text** – Enter a text for the message that you would like to display on the alert notification. Let's say, we would like to show the invoice name in the message. For this we'll select a dynamic field from the list.

The screenshot shows the 'Form Assistant' dialog box in Alerts4Dynamics. It has a 'Dynamic Values' section with a list of fields to choose from. The 'Operator' section is set to 'Set to'. The 'Look for:' field is set to 'Invoice'. The 'Name' field is highlighted in blue. The 'Import Sequence Number' section is also visible. The background shows the 'Settings' page with various configuration options like 'Alert for invoice paid', 'Exclude Users', and 'To/BCC' fields.

9) Click on **'Add'** and **'OK'**.

Operator:

Set to

Look for:

Name

Add

X | ↑ ↓

Name(Invoice)

Default value:

OK

10) Next, fill the following fields:

- **Alert As** – Since we want to send an alert through an email, we will select it as **'Email notification'**.
- **Alert level** – Let's say it is just a normal informational alert, we will select it as **'Information'**.

11) Populate the field **'Notification Associated with'** field. Since this alert is associated with **'Invoice'** but we want a notification to be shown on the related Account, we will select the Record URL of the **Account** entity and **not** of the **Invoice**.

Operator:

Set to

Look for:

Record URL(Dynamic)

Add

X | ↑ ↓

Record URL(Dynamic)(Customer (Ac)

Default value:

OK

This will set the field with value as shown below:

Process: Invoice alert
Create Notification Request

Notification Settings

Name *

Message Text *

Alert As

Pop-Up ☐ No ☒ Yes Email Notification ☐ No ☒ Yes

Form Notification ☐ No ☒ Yes User Preference ☐ No ☐ Yes

Display As Is Dismissible ☐ No ☐ Yes

Alert Level *

Display Until

Regarding

Notification Associated With *

12) Now we will define the email recipient and select the user from whom you would like to send an email notification. Click on the below look-up field. In this scenario we will set the Notification Audience section blank. Hence, the notification will be displayed to all the users in the CRM.

13) Select the user that you would like to send an email notification from and click on **'Add'**.

Lookup Record ×

Enter your search criteria.

Look for

Look in

Search

	Full Name ↑	Position
	Microsoft Forms Pro	
<input checked="" type="checkbox"/>	Mike James	88784
	Power Apps Checker Application	
	Power Platform Dataflows Common Data Servic...	

< 1 - 4 of 4 (1 selected) Page 1 >

14) Select the **'to'** recipient and click on **'Add'**.

Look Up Records

Enter your search criteria.

Look for

Look in

Search

☐ Show Only My Records

<input type="checkbox"/>	Account Name	Email
<input checked="" type="checkbox"/>	Tesco	ameydeo@ymail.com
<input checked="" type="checkbox"/>	test_5e09f2e6-1b93-48c9-a795-d8e387ef56b5	
<input type="checkbox"/>	A. Datum	vlauriant@adatum.com

1 - 50 of 90 (1 selected) Page 1

Selected records:

Audience Settings

Notification Audiences

Include Users Exclude Users

Team

Email Details

To - Same As Include Users ☐ Yes ☐ No

From To

CC BCC

Related Record Settings

15) Here, we want to send the email notification to all the contacts that are associated with **'Account'**, so we will select the primary entity as **'Account'** and select **'Record URL (Dynamic)'** from the list. Similarly, we can select any related entity as shown in the below image.

Form Assistant

Dynamic Values

Dynamic Values

Operator:
Set to

Look for:
Customer (Account)

Record URL(Dynamic)

Add

X | ↑ ↓

Record URL(Dynamic)(Customer (A

Default value:

OK

Process: Invoice alert

Create Notification Request

From: Mike James To:

CC: BCC:

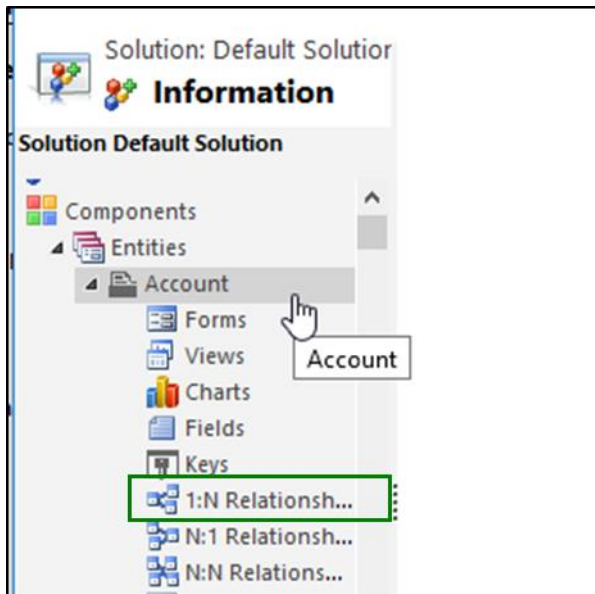
Related Record Settings

Primary Record Reference: {Record URL(Dynamic)(Customer (Account))}

Related Notification Audiences

16) Next step is to define the related recipients for receiving the email notification. For this, you will have to enter a logical name of 1: N relationship that account holds with contact. **Navigate to Advanced Settings → Customizations → Customize the system.**

17) Look for Account entity → 1: N relationship.



18) Look for the below relationship and open it.

Schema Name	Primary Entity	Related Entity ↑	Type of Behavior
incident_customer_acc...	Account	Case	Parental
account_IncidentResol...	Account	Case Resolution	Parental
account_connections1	Account	Connection	System
account_connections2	Account	Connection	System
<input type="checkbox"/> contact_customer_acc...	Account	Contact	Parental
contract_billingcustom...	Account	Contract	Referential, Restrict

19) Copy the name of the relationship.

Relationship **Account to Contact** Working on solution

Common

- Information
- Mappings

General

Relationship Definition


Primary Entity* Account Related Entity* Contact

Name* contact_customer_accounts


Searchable Yes


Hierarchical No

- 20) Now, navigate back to properties page and paste the name of this relationship into the below field. Similarly, if you want the audience to be of type more than one relationship then you can define multiple relationship as comma separated.


Process: Invoice alert

Create Notification Request

From

To

CC

BCC

Related Record Settings

Primary Record Reference

Related Notification Audiences

Include Users Relations
Exclu


Related Email Recipients

To Relations

CC Relations
BCC P

Email Content

- 21) Enter a valid subject and relevant message for an email.


Process: Invoice alert

Create Notification Request

Related Email Recipients

To Relations

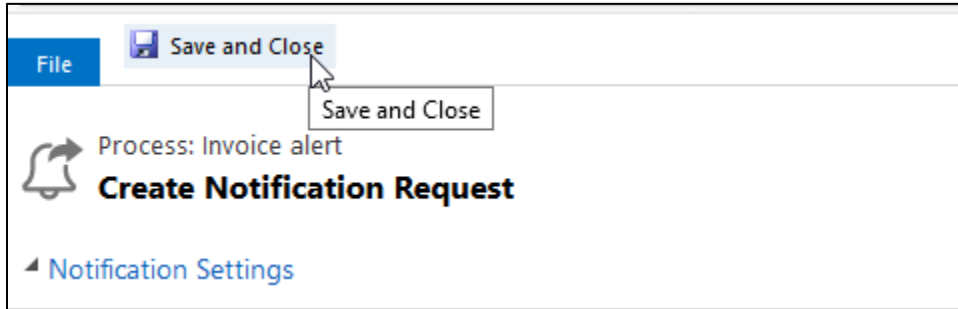
CC Relations

Email Content

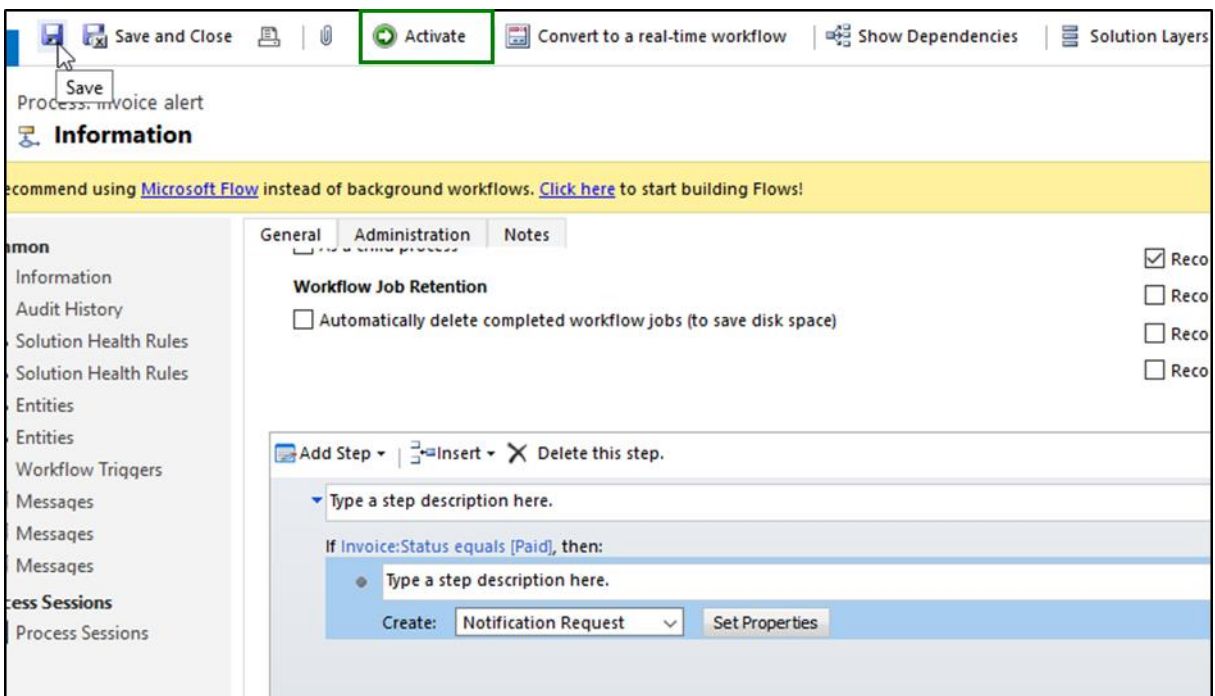
Subject +

Hi,
We confirm that the invoice is paid
Regards,
Mike

22) Once this is done, click on **'Save and Close'**.



23) Next, click on **'Save'** and then activate the workflow.



Message

As you have seen every Alert can have multiple messages attached to it. As soon you are done creating an Alert, you can add messages to it. For instance, if you create an alert **Holiday**, now you can add multiple messages under it. For eg. Holiday on 30th June, Holiday on 20th July, etc.

Note: Message cannot exist independently without an Alert.

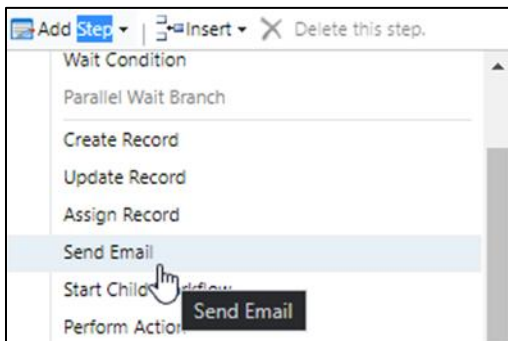
1. Click on add new message and a New Message page will open.

Enter the value in fields:

- Name:** This is the name of the message you are trying to create.
- Alert:** This is the Alert for which you are creating the message.
- Message Text:** Enter the message you would like to display in the notification or send to the users as email. Users can also pass dynamic values here for e.g. Account {name} has been created, where {name} stands for Account's name.
- Alert Level:** This can be categorized as **Information**, **Warning** and **Critical**. This determines the severity level of the Alert you are trying to create.
- Alert As:** This is the mode of notifying your users. It can be done as:
 - Pop-Up:** The notification with message will pop-up post clicking the global notification bell button
 - Form Notification:** Choosing an alert as "Form Notification" will show up the '**Display As**' field. Under this field, you can select either '**Dialog**' or '**Bar**'. If you select '**Dialog**' then alert will be shown as a dialog sliding out from the right of the screen immediately after

opening the record and if you choose **'Bar'** then the notification will be displayed under the ribbon in the form of a bar.

- c. **Email Notification:** The message will be sent to the users through email.
 - d. **User Preference:** Gives a provision to set the preference to receive an alert
- vi. **Is Dismissible:** Gives provision to configure the alert as either dismissible or non dismissible. If **'Yes'** is selected, alert becomes dismissible and if **'No'** is selected then alerts cannot be dismissed. *(Note: Is applicable to all type of alerts).*
- vii. **Auto Dismissible:** Gives provision to configure the alerts as auto-dismissible/non auto-dismissible. If **'Yes'** is selected then alerts will be automatically dismissed once the defined condition is no more satisfied. If **'No'** is selected then alerts cannot be dismissed automatically even if it moves out of the defined condition in the alert configuration. *(Note: Is applicable to Rule-based and Event-based alerts only).*
- viii. **Email Workflow:** If the **'Email Notification'** is selected in **'Alert As'** field then the user needs to create an OOB workflow for sending an email. We can send email notification to not only the CRM users but also the customers as well.



General Administration Notes

▼ Hide Process Properties

Process Name * Send Email Notification

Entity Alert

Activate As Process

Category Workflow

Available to Run

☐ Run this workflow in the background (recommended)

☒ As an on-demand process

☐ As a child process

Options for Automatic Processes

Scope Organization

Start when:

☐ Record is created

☐ Record status changes

☐ Record is assigned

☐ Record fields change Select

☐ Record is deleted

Workflow Job Retention

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

Add Step Insert Delete this step.

Send Email

Send email: Create New Message Set Properties

Process: Send Email Notification
Send Email

From: John Watson

To: {Owning User(Record (Account))}

Cc:

Bcc:

Subject: Account Overdue

Hi {Owning User(Record (Account))},

Please look into this Account which has been overdue.

Thanks,

John

- ix. **Process Start Date:** Process Start Date is a mandatory field. It is the date from when the notifications start getting created. This date cannot be prior to the date when the message is created. If you enter a previous date you will get the error message **Process Start Date should be greater than or equal to current date.**
- x. **Process End Date:** This is the date when notifications stop getting created. If you leave this field blank the notifications will continue getting created indefinitely. Process end date cannot be before Process Start Date, in case such a value is entered following error comes - **Process End Date should be greater than or equal to Process Start Date.**
- xi. **Display Until:** It defines for how much period the notification should be displayed. If user hasn't dismissed the notification.
- xii. **Language:** Alert messages can be created in multiple languages.
Note: Languages need to be enabled for creating messages in multiple languages. If the created Notification Message (language) is in English then the notification will be displayed only for users whose User Interface language is English.

General Notification

Process End Date ---

Notification Message

Message Text * ---

Language *

--Select--

English

--Select--

- xiii. **Include Users:** If you specify the set of users here, alerts will be shown to only these users.
- xiv. **Exclude Users:** If you specify the set of users here, alerts will be shown to every user in organization except for these users.
- xv. **Security Roles:** If you select security roles here, alerts will be shown to these security roles.

xvi. Teams: If you select Teams here, alerts will be shown to these teams.

Note:

- **If Include Users/Exclude Users/Security Roles are left blank, then the notifications will be shown to everyone.**
- **Include Users/Exclude Users have priority over Security Roles.**

These fields allow you to select your viewing audience for alert message. Dynamics values as well as static values can be selected in these fields.

For example, in below image we can see in **Include Users** field **Owning User** and **Owning User Manager** are selected which are dynamic values and in **Exclude Users** field '**Scott Hamells**' (CRM User) is selected.

Notification Audience

Include Users: x Owning User, x Owning User.Manager

Exclude Users: x Scott Hamells

Security Roles: x Salesperson

Teams: x Sales Team

2. After creating a message, save it and click on **Activate** to make it live.

Save Save & Close **Activate** Delete Refresh Share Email a Link Flow Word Templates Run Report

Click Activate to publish this message. Once published, it'll start generating notifications from the Process Start Date.

Holiday on 30th July
Message

Active Status Draft Status Reason Sam Kumar Owner

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 Language * English

3. To edit a message click on **Draft**.

The screenshot shows the Alerts4Dynamics interface for a message titled "Holiday on 30th July". The top toolbar includes buttons for Save, Save & Close, Draft (highlighted with a green box), Delete, Refresh, Share, Email a Link, Flow, Word Templates, and Run Report. The message is currently in the "Draft" state. The "General" tab is active, showing fields for Name, Alert, and Process Start Date. The "Notification Message" section shows the message text and the selected language (English).

Field	Value
Name	Holiday on 30th July
Alert	Holiday
Process Start Date	6/4/2020
Message Text	Holiday on 30th July due to elections
Language	English

Note: You can set state as Draft or edit a message only before Process Start Date. You cannot set the state to Draft or edit that message after the process of creating notifications has started because it becomes Read Only.

The screenshot shows the Alerts4Dynamics interface for the same message, now in the "Active" state. A confirmation dialog box is displayed in the center, stating "No changes are allowed after the Process Start Date has passed." with an "OK" button. The background interface is dimmed, showing the same fields as the previous screenshot.

Notification Message (Languages)

If the created Notification Message (language) is in English then the notification will be displayed only for users whose User Interface language is English.

Every Message can have multiple languages if they are enabled by the user in CRM. There are **two** ways to **Create** Notification Message (Language) for Message record.

1. When the user saves a Message, the Language record is automatically created and appears in Notification Message Sub-Grid.

- After Message record is created, and user needs to add another language record (which should be different from the existing one). Click on '+ New Language' button on Sub-Grid and Language form will be displayed and you can create a new Notification Message (language) for that particular record.

Notification Message

✓ Message ↑ Language ↓

An account has been created.	English
------------------------------	---------

+ New Language Refresh

Similarly, Notification Message record can be **Updated** in two ways:

- Change the '**Message Text**' field in the Message record will update the respective Notification Message record as it is in the '**Language**' field of that Message record.

Account Create Message
Message

Active Status Draft Status Reason max a-4d Owner

General Notification Related

Notification Message

Message Text * An account has been created. Language * English

Notification Configuration

- Select the Notification Message from its Sub-Grid in Message record and click on the '**Edit**' button. Notification Message record form will be opened and you can edit the message from that form.

Notification Message

✓ Message ↑ Language ↓

✓ An account has been created.	English
--------------------------------	---------

Edit Delete Language Share

Note: The '**Message Text**' and '**Language**' fields will get reset post deleting the respective Notification Message (Language) record (these two fields will reset only after the user refreshes the message record page).

For example, for Multi-Language message, consider there are total three users in the organization out of which one user have **French** language enabled as his CRM's User Interface Language. Alerts4Dynamics gives a provision through which alert message can be added in user's preferred language (French in this example) to be shown to the respective user. In addition, the users that do not have a '**French**' language enabled as their CRM's User Interface language will not be able to see the French message.

Message Type

There are two **Message Types** in Alerts4Dynamics:

1. Simple (by default)
2. Advanced

Simple:

In Simple mode, user can configure the notifications like Message Text, specifying notification audience which can be dynamic users, teams and security roles as well.



For Notification and Email Audiences we can select user type lookup fields which are available on the entity form will be shown in the Include Users, Exclude Users dropdown and for teams, similarly to user we can select team lookup fields.


The screenshot shows a configuration form with two tabs: 'General' and 'Notification'. The 'General' tab is active. It contains several fields: 'Name' (required, empty), 'Message Type' (required, set to 'Simple' and highlighted with a green box), 'Alert' (required, empty), 'Process Start Date' (required, empty, with a calendar icon), and 'Process End Date' (empty, with a calendar icon). Below these is a section titled 'Notification Message' containing 'Message Text' (required, empty) and 'Language' (required, set to '--Select--').

Advanced:

In Advanced mode, consider a scenario in which the alert is configured for Invoice but we want the notification to be shown on related Account record.

Similarly, we want the Notification and Email Audiences related to the account like **‘One to Many’** and **‘Many to Many’** relationship.

Active Lead Message		Active Status	Draft Status Reason
Message			
<div>General Notification Related</div>			
Name	* Active Lead Message		
Message Type	* Advanced		
Workflow	*  Active Lead Alert		
Alert	 Open Leads		
Process Start Date	* 6/3/2020		
Process End Date	---		

 Process: Active Lead Alert

Information

We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!

Common

Information
 Audit History
 Solution Health Rules
 Solution Health Rules
 Workflow Triggers
 Messages
 Messages
 Messages

Process Sessions

Process Sessions

General Administration Notes

Hide Process Properties

Process Name * Active Lead Alert
 Activate As Process

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)

Entity Lead
 Category Workflow
 Options for Automatic Processes
 Scope Organization
 Start when:

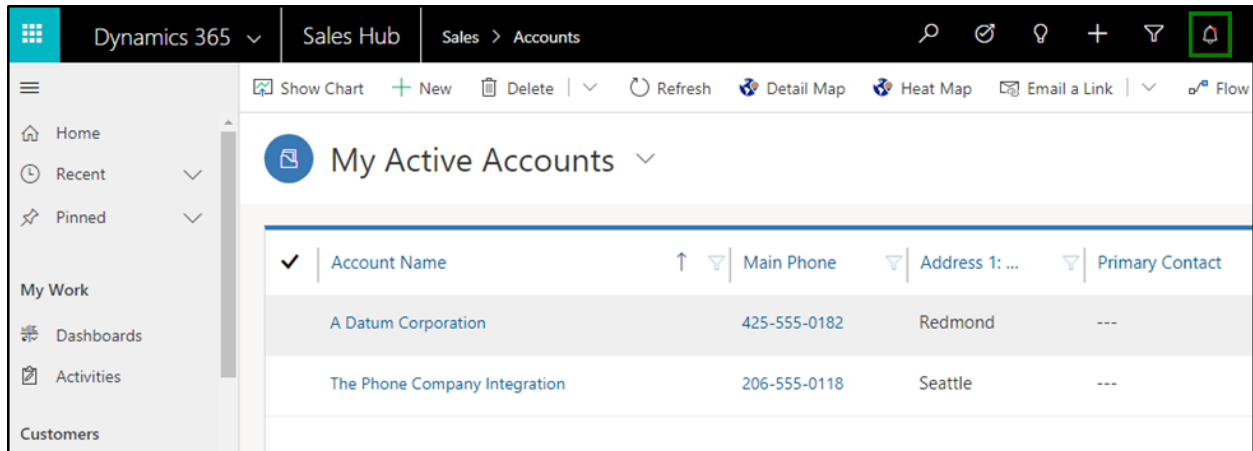
☐ Record is created
☐ Record status changes
☐ Record is assigned
☐ Record fields change
☐ Record is deleted

Notifications

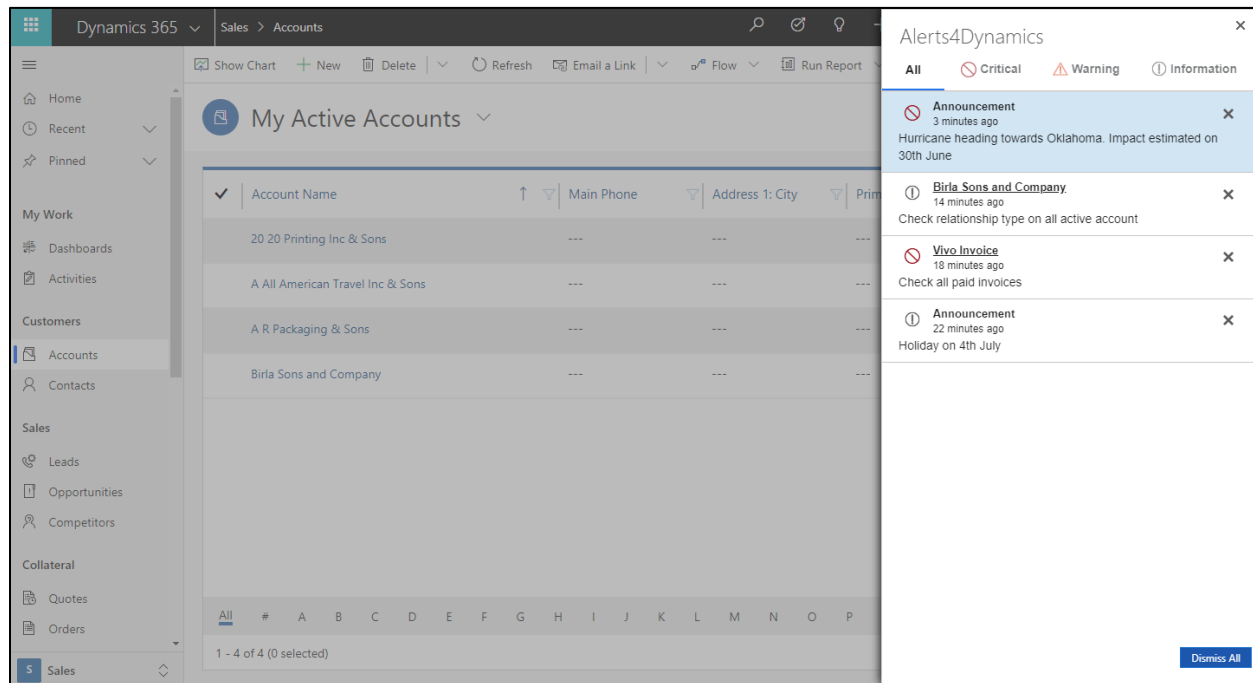
Every alert message is shown to the users as Notifications. The **Notifications** button is on the ribbon and can be accessed from anywhere in the CRM.

Note: Notification button appears only when you have active notifications in the system.

Whenever there is a new notification a **red dot** comes on the Notification button. Once the notification is read this **red dot** disappears.

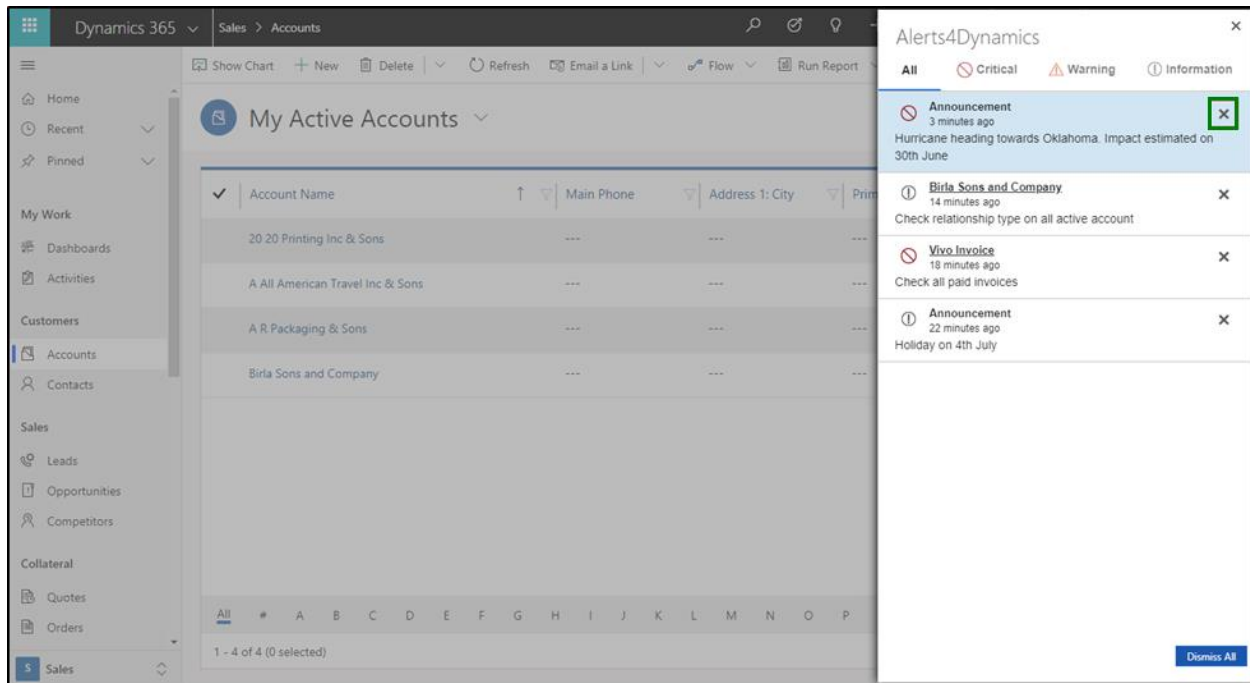


Notifications can be seen by clicking on Notification button.

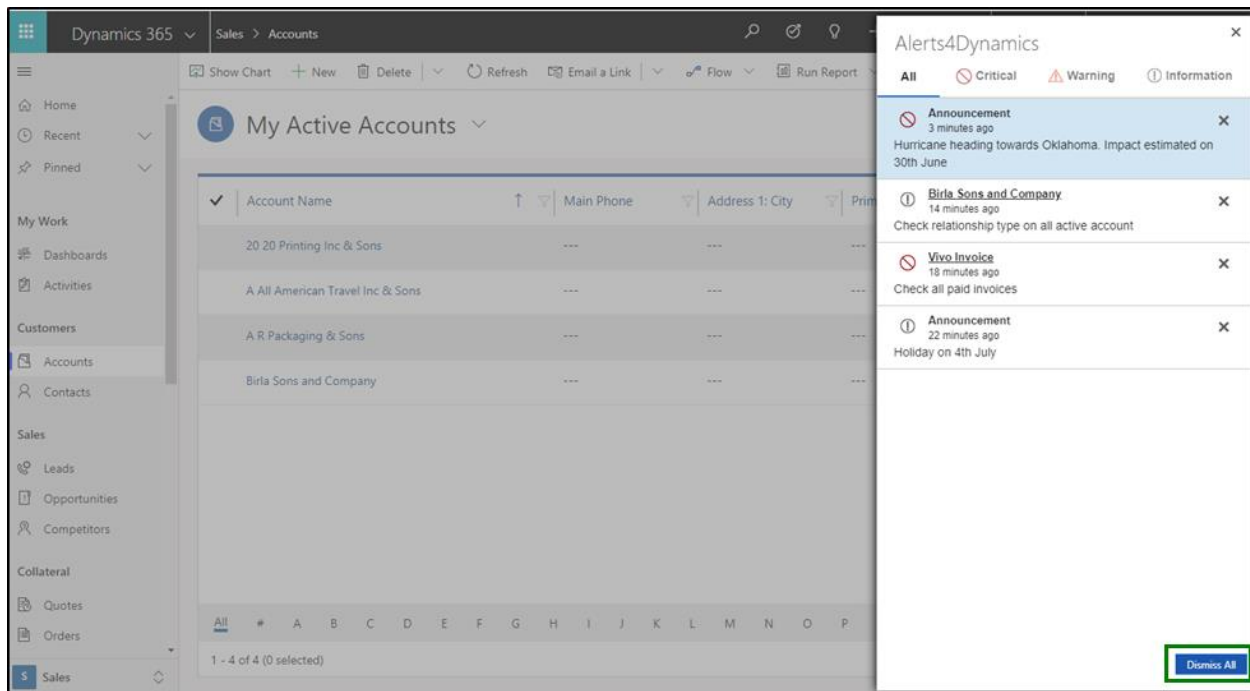


Dismiss Notifications: Notifications can be dismissed at any time. Notifications can be dismissed in two ways:

- 1. Dismiss alerts individually:** Every alert can be dismissed individually by clicking on cross icon next to it.



2. Dismiss all alerts at once: All the alerts can be dismissed at once by clicking on **Dismiss All** button.



Dismissible Alert Notifications:

If user sets '**Is Dismissible**' field as '**Yes**' then the alert can be dismissed. In this case, '**X**' button will continue showing up on the alert notification indicating that the alert notification is dismissible.

Alerts4Dynamics – User Manual

Record Based Alert

Message

Active StatusActive Status Reason

General

Notification

Related

Name

*

Record Based Alert

Message Type

*

Simple

Alert

*

Record specific

Process Start Date

*

10/5/2020

Notification Message

Message Text

*

(name) dismissible alert notification

Language

*

English

Notification Configuration

Alert As

*

Pop-Up

Alert Level

*

Information

Display Until

Is Dismissible

Yes

Sales Hub

Show Chart

New

Delete

Refresh

Email a Link

Flow

Run Report

Excel Templates

Export to Excel

My Active Accounts

Account Name	Main Phone	Address 1: City	Primary Contact
Account 1	1234567890	New York	John Doe
Account 2	0987654321	Los Angeles	Jane Smith
Account 3	1111111111	Chicago	Mike Johnson
Account 4	2222222222	San Francisco	Sarah Lee
Account 5	3333333333	Seattle	David Kim
Account 6	4444444444	Portland	Emily White
Account 7	5555555555	Denver	Chris Brown
Account 8	6666666666	Phoenix	Alex Green
Account 9	7777777777	San Diego	Mia Black
Account 10	8888888888	San Jose	Noah Gray

Alerts4Dynamics

All

Critical

Warning

Information

1

A Datum Fabrication

4 minutes ago

A Datum Fabrication dismissible alert notification

×

If user sets '**Is Dismissible**' field as '**No**' then the alert cannot be dismissed. In this case, '**X**' button will not be displayed on the alert notification indicating that the alert notification is non-dismissible.

Alerts4Dynamics – User Manual

Record based alert Active Status Active Status Reason

Message

General Notification Related

Name * Record based alert

Message Type * Simple

Alert * [Record specific](#)

Process Start Date * 10/5/2020

Notification Message

Message Text * (name) non dismissible alert notification Language * English

Notification Configuration

Alert As * Pop-Up Alert Level * Information

Display Until ---

Is Dismissible **No**

Sales Hub

Alerts4Dynamics

All Critical Warning Information

A Datum Fabrication
2 minutes ago
A Datum Fabrication non dismissible alert notification

My Active Accounts

Account Name	Main Phone	Address 1: City	Primary Contact
Account 1	Phone 1	City 1	Contact 1
Account 2	Phone 2	City 2	Contact 2
Account 3	Phone 3	City 3	Contact 3
Account 4	Phone 4	City 4	Contact 4
Account 5	Phone 5	City 5	Contact 5
Account 6	Phone 6	City 6	Contact 6
Account 7	Phone 7	City 7	Contact 7
Account 8	Phone 8	City 8	Contact 8
Account 9	Phone 9	City 9	Contact 9
Account 10	Phone 10	City 10	Contact 10

Note:

- **By default the value of the field 'Is Dismissible' will be 'Yes'**
- **Despite setting dismissible as 'No', alert will still be dismissed if the respective notification is deactivated or the 'Display until' date of the alert message is already passed**

Log of Notifications: Log of Read/Dismissed Notifications can be seen by users in the Notification tab.

To see Log of Read/Dismissed notifications, go to **Alerts4Dynamics App → Alerts → Select Alert → Select Message → Notification Tab → Select Notification** and you can view the status.

Note: Only Alerts4Dynamics Administrator, Alerts4Dynamics Manager and System Administrator can see Log of Notifications.

The screenshot displays two notification sections in the Alerts4Dynamics interface. The top section, 'Read Notifications', and the bottom section, 'Dismissed Notifications', both have their titles highlighted with green boxes. Each section features a table with columns for 'User' and 'Date'. The 'User' column lists 'Sam Kumar' and the 'Date' column shows '6/1/2020 6:33 PM'. Above each table are icons for 'Refresh' and 'Run Report'.

Auto-dismiss Alert Notifications

This provision allows user to decide if they want an alert to auto dismiss once the record moves out of the rule/condition defined while configuring an alert. This is only applicable for the following alert types:

- **Rule-based Alerts**
- **Even-based Alerts**

Rule-based Alert:

Let's consider a scenario where user wants an alert to auto dismiss once the account record moves out of 'My Active Accounts' entity view.

Steps to Auto-dismiss Alerts

- 1) Create a new alert of type **'Rule Based'** and define the rule mode as **'Simple'** with a view as **'My Active Accounts'**.

The screenshot shows the 'Rule based alert' configuration form. The 'General' tab is selected. The form contains the following fields: 'Name' (Rule based alert), 'Alert Type' (Rule Based), 'Entity Configuration' (account), 'Rule Mode' (Simple), and 'View' (My Active Accounts). The 'View' field is highlighted with a green box. Below these fields are 'Interval' and 'Poll Interval' fields.

2) Add a message to this alert.

Rule based alert
Alert

General Related

Entity Configuration * [account](#)

Rule Mode * Simple

View * My Active Accounts

Interval

Poll Interval * X Hour(s) Interval * 2

Messages

+ New Message Refresh Run Report ...

✓ Name Message Text Alert As Display As Alert Level Process Start Date Process End Date ... Create

Add New Message

Add a related Message to this record.

No data available.

3) Set 'Auto Dismissible' as 'Yes'.

Rule based alert - My Active Accounts
Message

Active Status Active Status Reason

General Notification Related

Name * Rule based alert - My Active Accounts

Message Type * Simple

Alert * [Rule based alert](#)

Process Start Date * 10/6/2020

Process End Date ---

Notification Message

Message Text * (name) active account alert notification Language * English

Notification Configuration

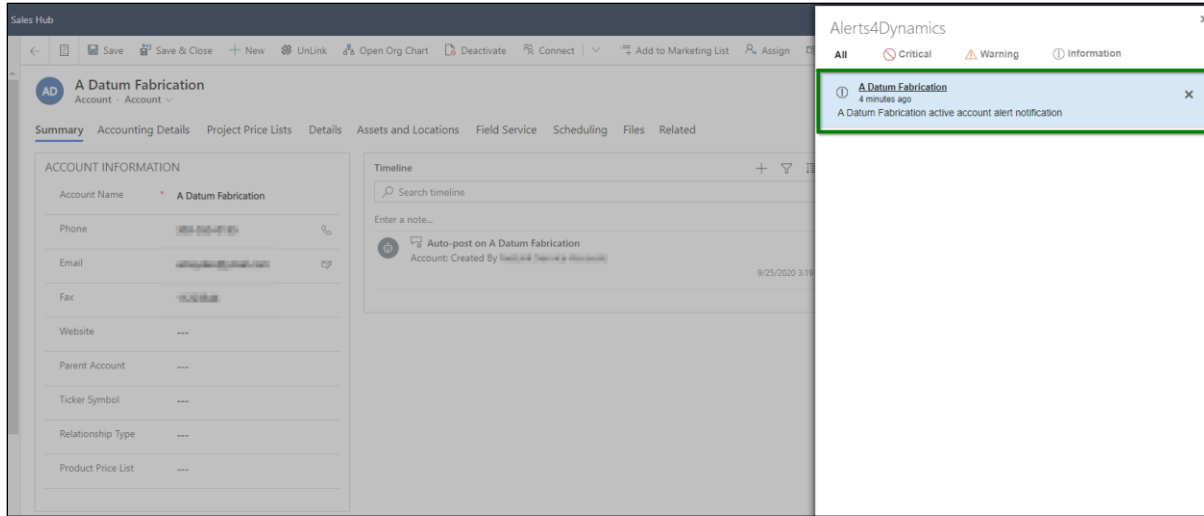
Alert As * Form Notification Display As * Dialog

Display Until --- Alert Level * Information

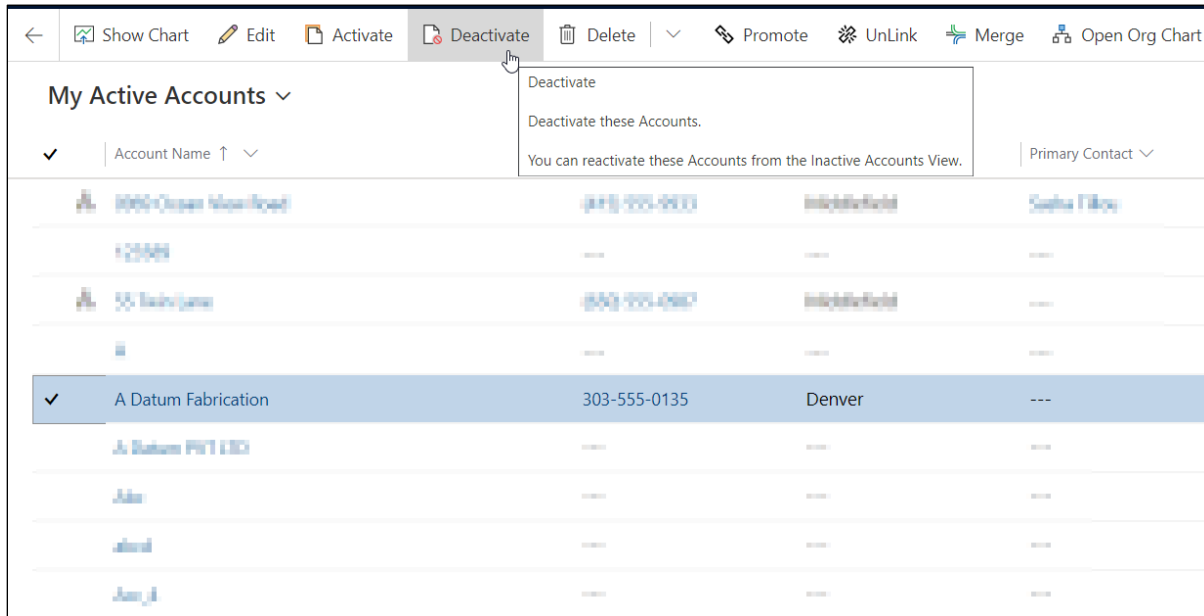
Is Dismissible Yes Auto Dismissible **Yes**

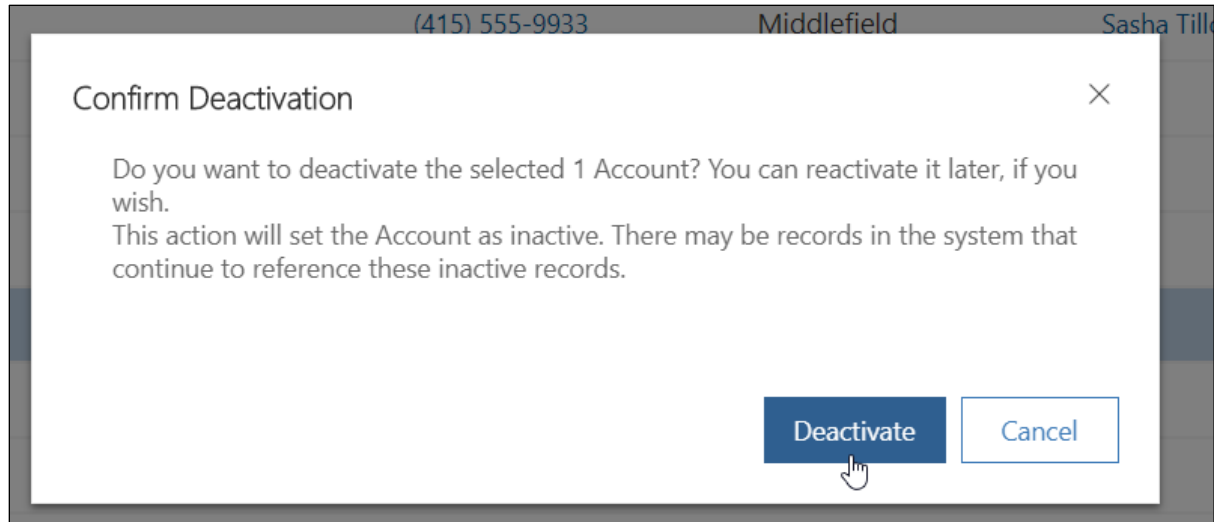
4) Navigate to **Accounts → My Active Accounts → Open any record**. Here, an alert will be displayed as a Form dialog post opening the record and it will continue showing up as long as it satisfies the rule defined in the alert configuration i. e. **'My Active Accounts'**.

Alerts4Dynamics – User Manual



5) Now deactivate this account record so that it will move out of **'My Active Accounts'** entity view.





- 6) Once deactivated, a record is moved from **'My Active Accounts'** view to **'Inactive Accounts'** which means it no more satisfies the rule ('My Active Accounts') defined in the alert configurations. As soon as this happens, the alert will be auto dismissed in about 5-10 seconds. So now, if we switch to **'Inactive Accounts'** view and open the account record, you will no longer see an alert.
(Note: It might take a while for an alert to get auto dismissed.)

Inactive Accounts ▾				
✓	Account Name ↑ ▾	Primary Contact ▾	Main Phone ▾	Address 1: City ▾
	A Datum Fabrication	---	303-555-0135	Denver

← + New Activate Open Org Chart Connect ▾ Assign Email a Link Delete Refresh Process ▾ Geo Code Share ⋮

Read-only This record's status: **Inactive**

AD A Datum Fabrication
Account · Account ▾

--- Annual Revenue --- Number of Employees --- Completeness ▾

Summary Accounting Details Project Price Lists Details Assets and Locations Field Service Scheduling Files Related

ACCOUNT INFORMATION

Account Name*

A Datum Fabrication

Phone

303-555-0135

Email

adam@datum.com

Fax

1-800-555-1234

Website

Timeline

Search timeline

Enter a note...

Auto-post on A Datum Fabrication
Account: Created By **Lead and Service Account** 9/25/2020 3:19 PM ▾

Primary Contact

CONTACTS

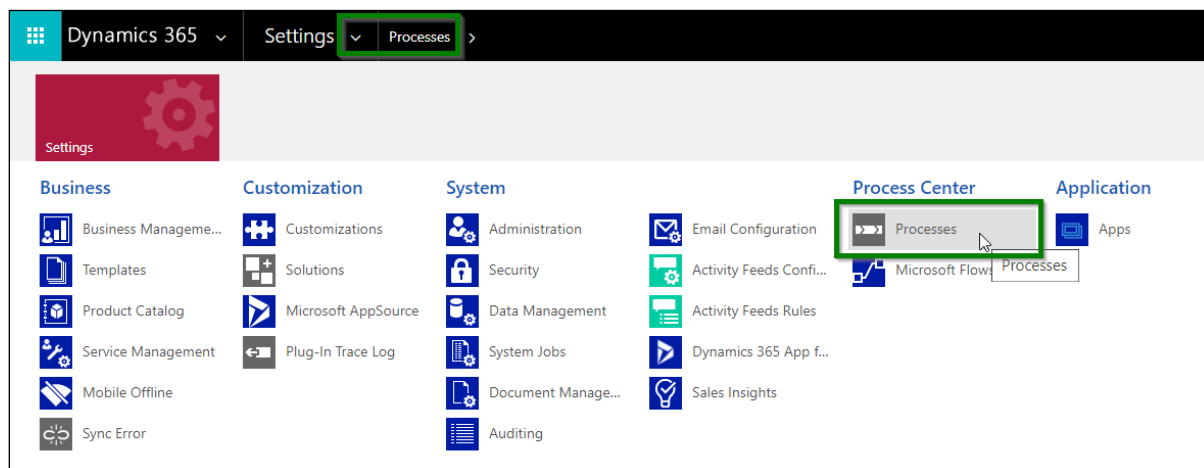
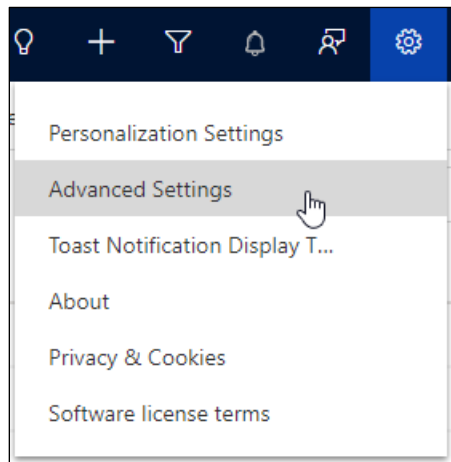
No data available.

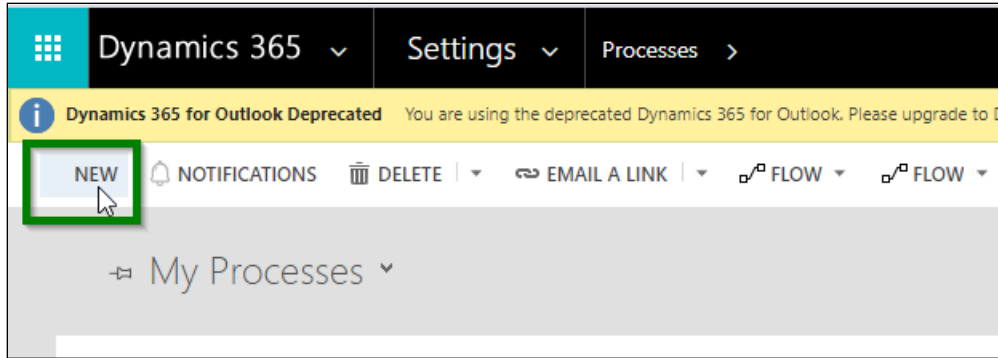
Event-based Alert:

Let's consider that the user wants to create an alert notification to be shown when the value of a 'Subject' field of the case record changes. And later, user wants this alert to auto-dismiss once the case is resolved.

Steps to Auto-dismiss Alerts

- 1) Navigate to **Advanced Settings** → **Settings** → **Process** → **New Process**.





2) Select category as **'Workflow'** and choose the Entity → Click on **OK**.

 A screenshot of the 'Create Process' dialog box. The title is 'Create Process'. Below the title is a description: 'Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.' There are two input fields: 'Process name: *' with the value 'Auto Dismiss alert for case' and 'Category: *' with a dropdown menu showing 'Workflow'. Next to 'Category' is 'Entity: *' with a dropdown menu showing 'Case'. Both the 'Category' and 'Entity' dropdowns are highlighted with a green box. Below these fields is a checkbox labeled 'Run this workflow in the background (recommended)' which is checked. A yellow banner below the checkbox says: 'We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!'. Below the banner are two radio buttons for 'Type': 'New blank process' (selected) and 'New process from an existing template (select from list)'. Below the radio buttons is a table with columns 'Template Name ↑', 'Primary Entity', and 'Owne'. The table is empty. At the bottom left is a 'Properties' button. At the bottom right are 'OK' and 'Cancel' buttons, with the 'OK' button highlighted by a green box.

3) Go to **'Record fields change'** → Select the field **'Subject'** from the list.

Alerts4Dynamics – User Manual

Power Apps

File | Save and Close | Activate | Convert to a real-time workflow | Show Dependencies | Solution Layers | Actions

Process: Auto Dismiss alert for case

Information

We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!

Common

- Information
- Audit History
- Entities
- Entities
- Notify Workflow Failure
- User Adoption Entity ...
- Agent script steps
- Macro Run Histories
- Catalog Assignments
- Workflow Triggers
- Messages
- Messages
- Messages
- Chatbot subcompone...

Process Sessions

- Process Sessions

General | Administration | Notes

Hide Process Properties

Process Name * Auto Dismiss alert for case

Activate As Process

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)

Entity Case

Category Workflow

Options for Automatic Processes

Scope Organization

Start when:

- ☐ Record is created
- ☐ Record status changes
- ☐ Record is assigned
- ☒ Record fields change **Select**
- ☐ Record is deleted

Add Step | **Insert** | **Delete this step.**

Select this row and click Add Step.

Select Fields

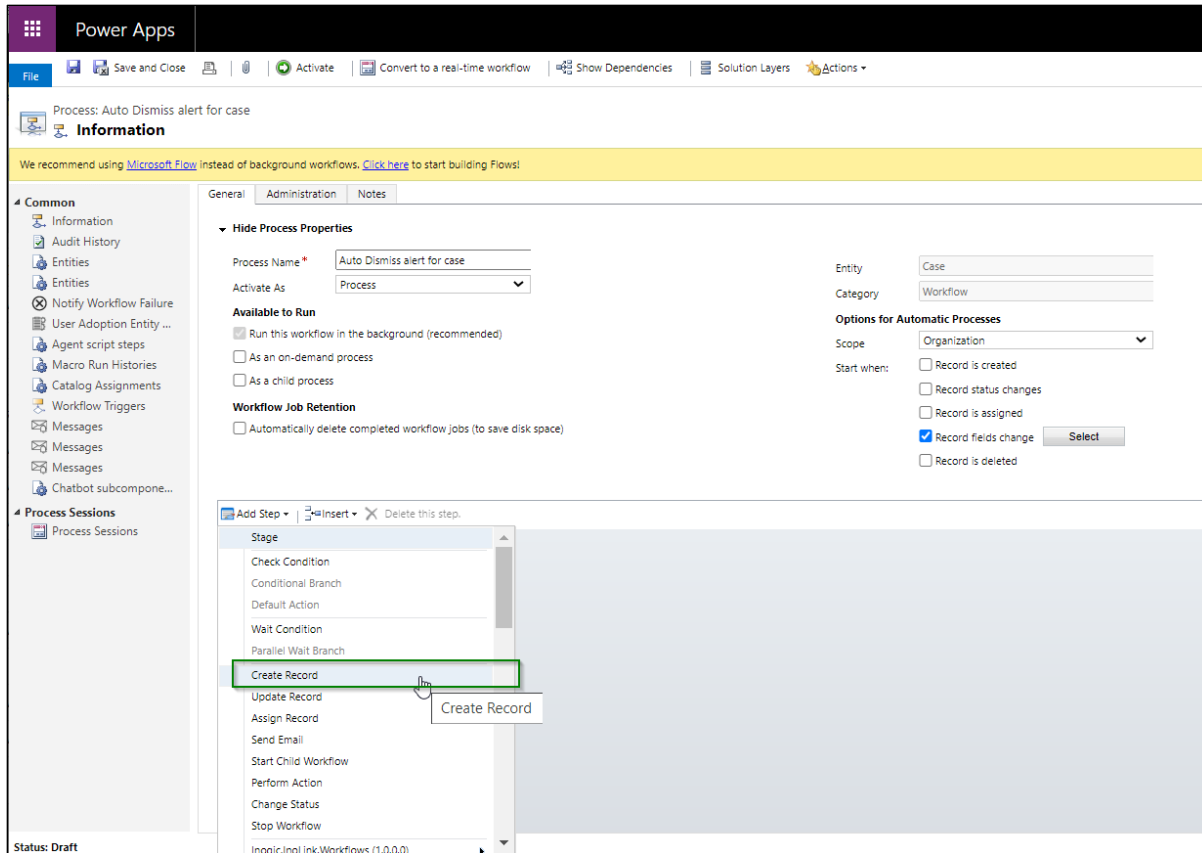
Select the fields that the process will monitor for changes.

	Name	Type
<input type="checkbox"/> Display Name ▲		
<input type="checkbox"/> Satisfaction	customersatisfactioncode	Option Set
<input type="checkbox"/> Sentiment Value	sentimentvalue	Floating Point Number
<input type="checkbox"/> Serial Number	productserialnumber	Single Line of Text
<input type="checkbox"/> Service Level	contractservicelevelcode	Option Set
<input type="checkbox"/> Service Stage	servicestage	Option Set
<input type="checkbox"/> Severity	severitycode	Option Set
<input type="checkbox"/> SLA	slaid	Lookup
<input type="checkbox"/> Social Profile	socialprofileid	Lookup
<input type="checkbox"/> Status	statecode	Status
<input type="checkbox"/> Status Reason	statuscode	Status Reason
<input checked="" type="checkbox"/> Subject	subjectid	Lookup
<input type="checkbox"/> Upsell Referral	int_upsellreferral	Two Options

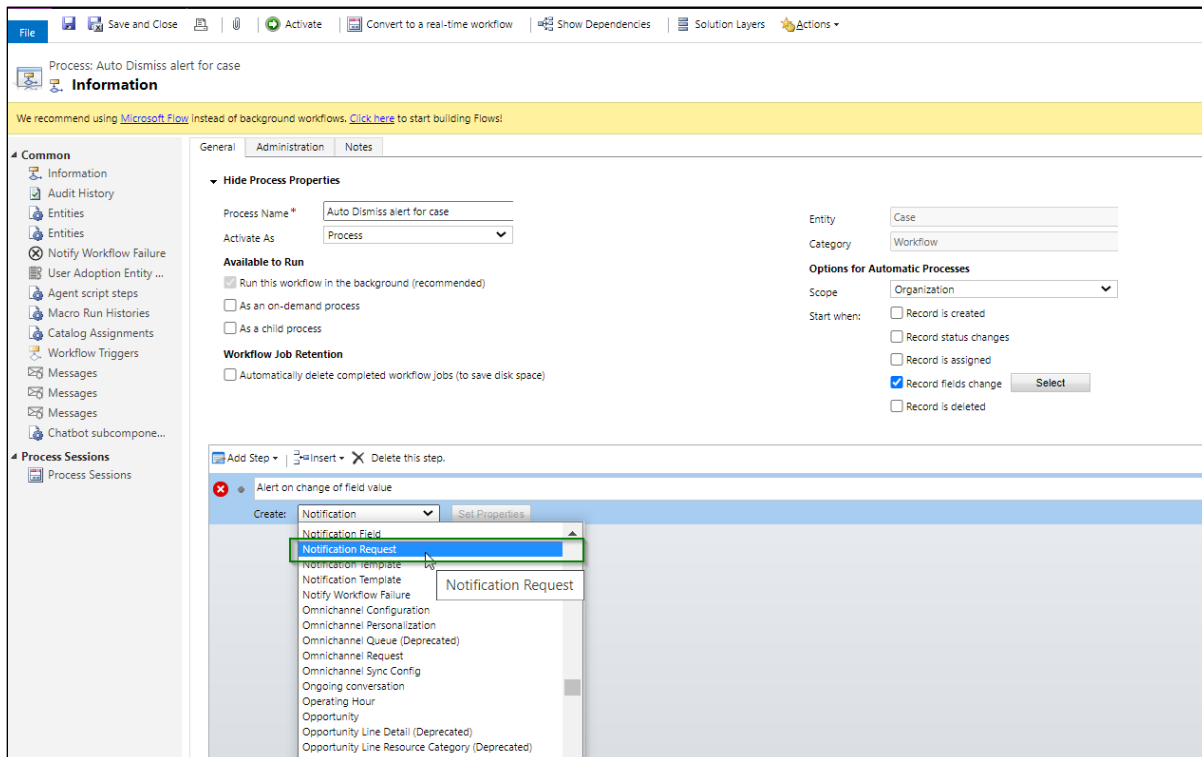
OK **Cancel**

4) Create a notification request record to create an alert.

Alerts4Dynamics – User Manual



5) Select 'Notification Request'.



6) Click on 'Set Properties'.

The screenshot shows the 'Set Properties' dialog for a process named 'Auto Dismiss alert for case'. The dialog is divided into several sections:

- General:**
 - Process Name: Auto Dismiss alert for case
 - Entity: Case
 - Category: Workflow
 - Scope: Organization
 - Start when: Record is created, Record status changes, Record is assigned, Record fields change (checked), Record is deleted.
- 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): ☐
- Process Sessions:**
 - Process Sessions

The 'Set Properties' button is highlighted with a green box.

7) Perform the dynamic field selection as required.

The screenshot shows the 'Create Notification Request' form in Microsoft Dynamics 365. The form is titled 'Notification Request: New Notification Request - Microsoft Dynamics 365 - Google Chrome'. The 'Name' field is highlighted with a green box and contains the text 'Auto dismiss event based alert for Case'. The 'Regarding' field is set to 'Case(Case)'. The 'Form Assistant' pane on the right shows the 'Look For' dropdown set to 'Case' and the 'Add' button highlighted with a green box.

8) To display alert on the case record, set the 'Notification Associated With' as shown below:

Alerts4Dynamics – User Manual

File Save and Close

Process: Auto Dismiss alert for case
Create Notification Request

Notification Settings

Name * Auto dismiss event based alert for Case

Message Text * [Case Title(Case)] is active

Alert As

Pop-Up ☐ No ☐ Yes

Form Notification ☐ No ☒ Yes

Display As Dialog

Alert Level * Information

Display Until

Regarding [Case(Case)]

Notification Associated With

Audience Settings

Notification Audiences

Include Users

Exclude Users

Form Assistant

Dynamic Values

Operator:

Set to

Look for:

Case

Record URL(Dynamic)

Add

Record URL(Dynamic)(Case)

Default value:

OK

File Save and Close

Process: Auto Dismiss alert for case
Create Notification Request

Notification Settings

Name * Auto dismiss event based alert for Case

Message Text * [Case Title(Case)] is active

Alert As

Pop-Up ☐ No ☐ Yes

Form Notification ☐ No ☒ Yes

Display As Dialog

Alert Level * Information

Display Until

Regarding [Case(Case)]

Notification Associated With [Record URL(Dynamic)(Case)]

9) After creating an alert, now add a **'Wait'** condition which will wait till the case is resolved.

Power Apps

File Save and Close Activate Convert to a real-time workflow Show Dependencies Solution Layers Actions

Process: Auto Dismiss alert for case
Information

We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flow!

Common

Information

Audit History

Entities

Entities

Notify Workflow Failure

User Adoption Entity ...

Agent script steps

Macro Run Histories

Catalog Assignments

Workflow Triggers

Messages

Messages

Messages

Chatbot subcomponent...

Process Sessions

Process Sessions

General Administration Notes

Hide Process Properties

Process Name * Auto Dismiss alert for case

Activate As Process

Entity Case

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)

Options for Automatic Processes

Scope Organization

Start when:

☐ Record is created

☐ Record status changes

☐ Record is assigned

☒ Record fields change

☐ Record is deleted

Select

Add Step Insert Delete this step.

Alert on More field value

Create: Notification Request Set Properties

Alerts4Dynamics – User Manual

Power Apps

File | Save and Close | Activate | Convert to a real-time workflow | Show Dependencies | Solution Layers | Actions

Process: Auto Dismiss alert for case

Information

We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!

Common

- Information
- Audit History
- Entities
- Entities
- Notify Workflow Failure
- User Adoption Entity ...
- Agent script steps
- Macro Run Histories
- Catalog Assignments
- Workflow Triggers
- Messages
- Messages
- Messages
- Chatbot subcompone...

Process Sessions

- Process Sessions

General | Administration | Notes

Hide Process Properties

Process Name * Auto Dismiss alert for case

Activate As Process

Entity Case

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)

Options for Automatic Processes

Scope Organization

Start when:

- ☐ Record is created
- ☐ Record status changes
- ☐ Record is assigned
- ☒ Record fields change
- ☐ Record is deleted

Add Step | Insert | Delete this step.

Stage

- Check Condition
- Conditional Branch
- Default Action
- Wait Condition
- Parallel Wait Branch
- Create Record
- Update Record
- Assign Record
- Send Email
- Start Child Workflow
- Perform Action
- Change Status
- Stop Workflow

Wait Condition

Let's further configure the condition.

Power Apps

File | Save and Close | Activate | Convert to a real-time workflow | Show Dependencies | Solution Layers | Actions

Process: Auto Dismiss alert for case

Information

We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!

Common

- Information
- Audit History
- Entities
- Entities
- Notify Workflow Failure
- User Adoption Entity ...
- Agent script steps
- Macro Run Histories
- Catalog Assignments
- Workflow Triggers
- Messages
- Messages
- Messages
- Chatbot subcompone...

Process Sessions

- Process Sessions

General | Administration | Notes

Hide Process Properties

Process Name * Auto Dismiss alert for case

Activate As Process

Entity Case

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)

Options for Automatic Processes

Scope Organization

Start when:

- ☐ Record is created
- ☐ Record status changes
- ☐ Record is assigned
- ☒ Record fields change
- ☐ Record is deleted

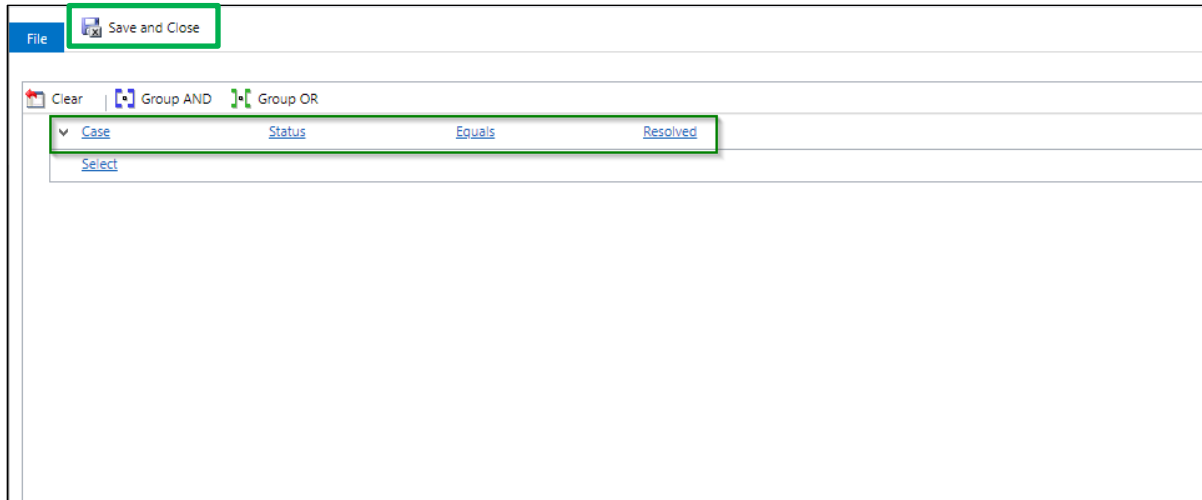
Add Step | Insert | Delete this step.

- Alert on change of field value
- Wait until the case is resolved

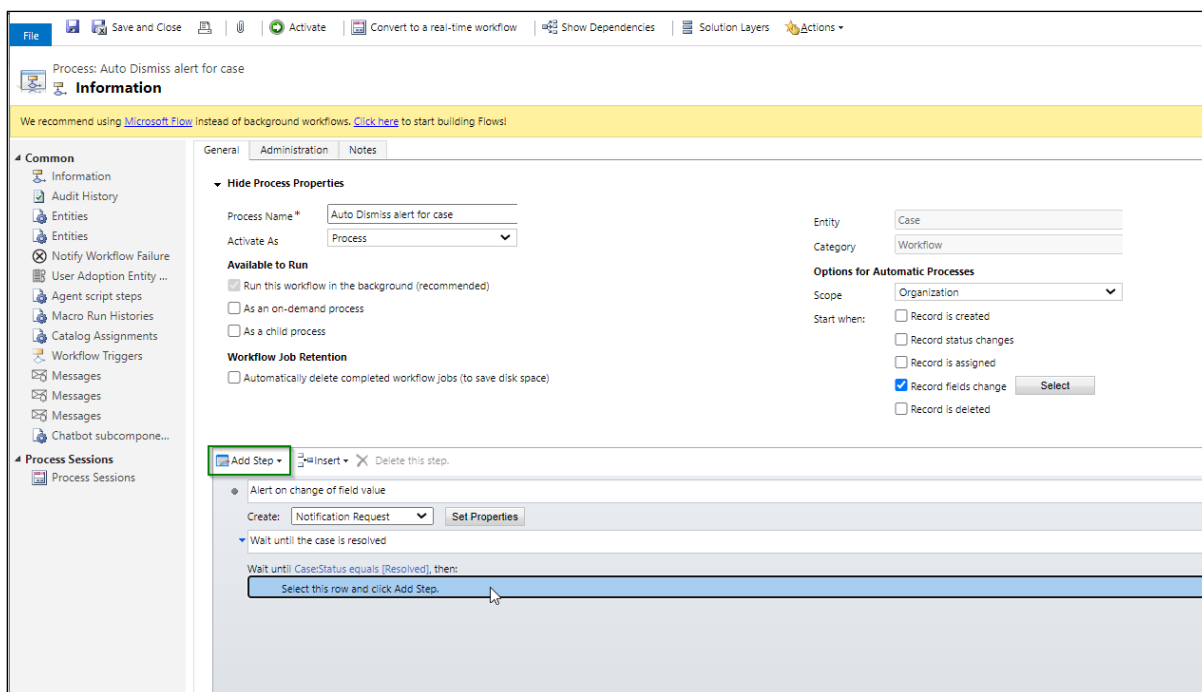
Create: Notification Request Set Properties

Wait until <condition> (click to configure) then:

Select this row and click Add Step.

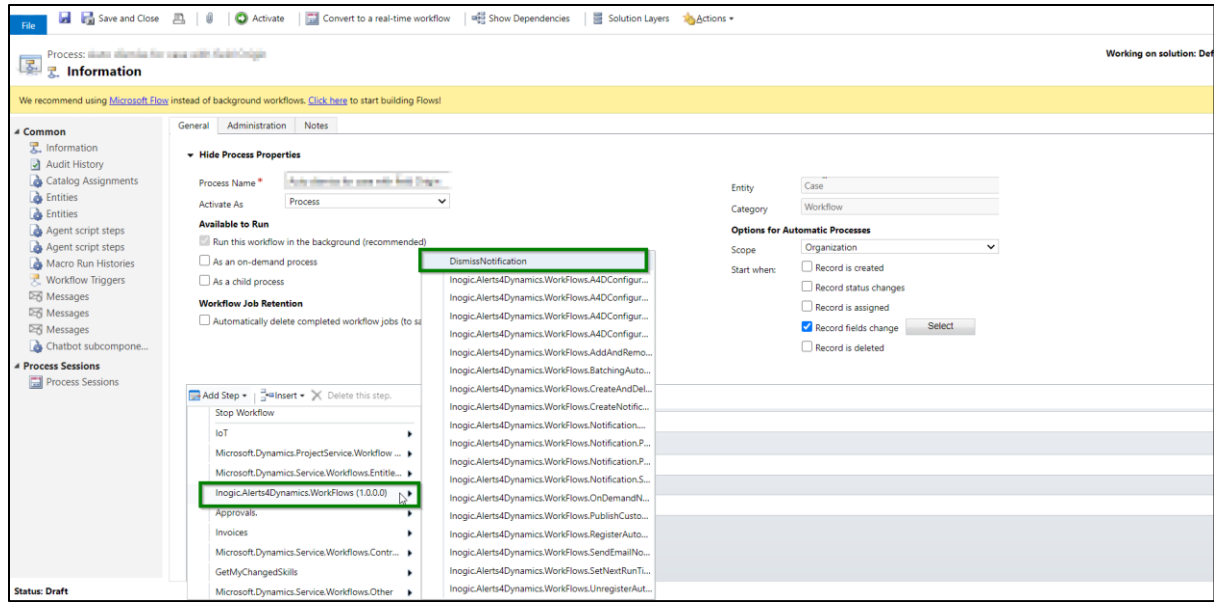


10) To auto-dismiss the alert once the case is resolved, select the row and add a new step as shown below:

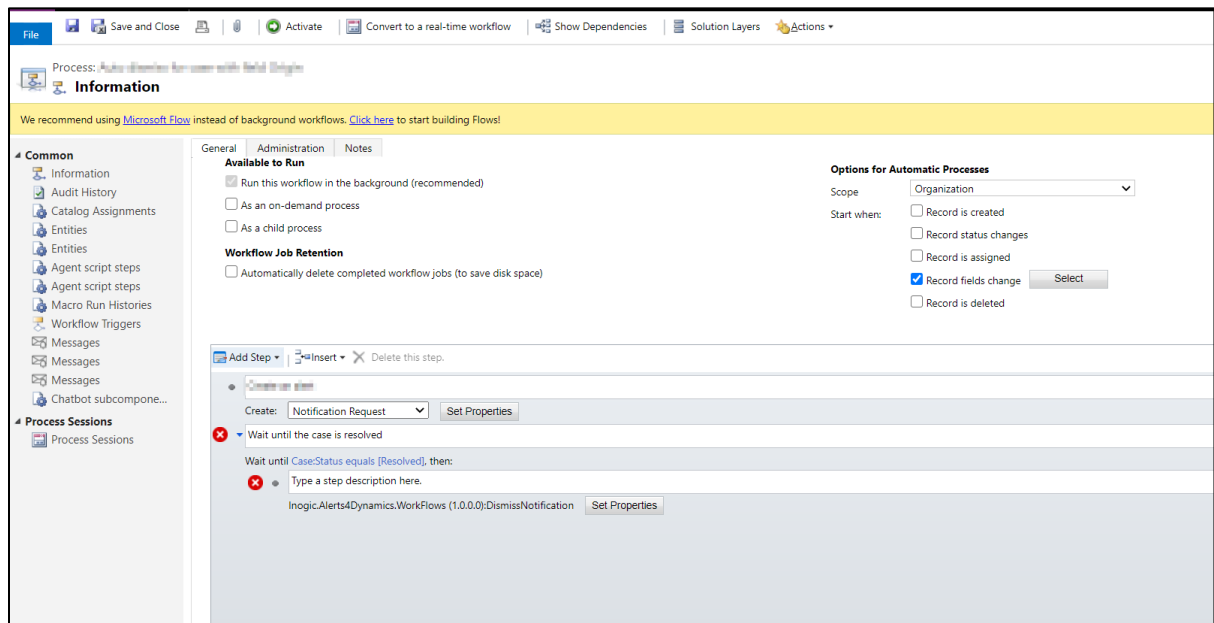


11) Select the below assembly from the list for auto dismissing the alert notification.

Alerts4Dynamics – User Manual

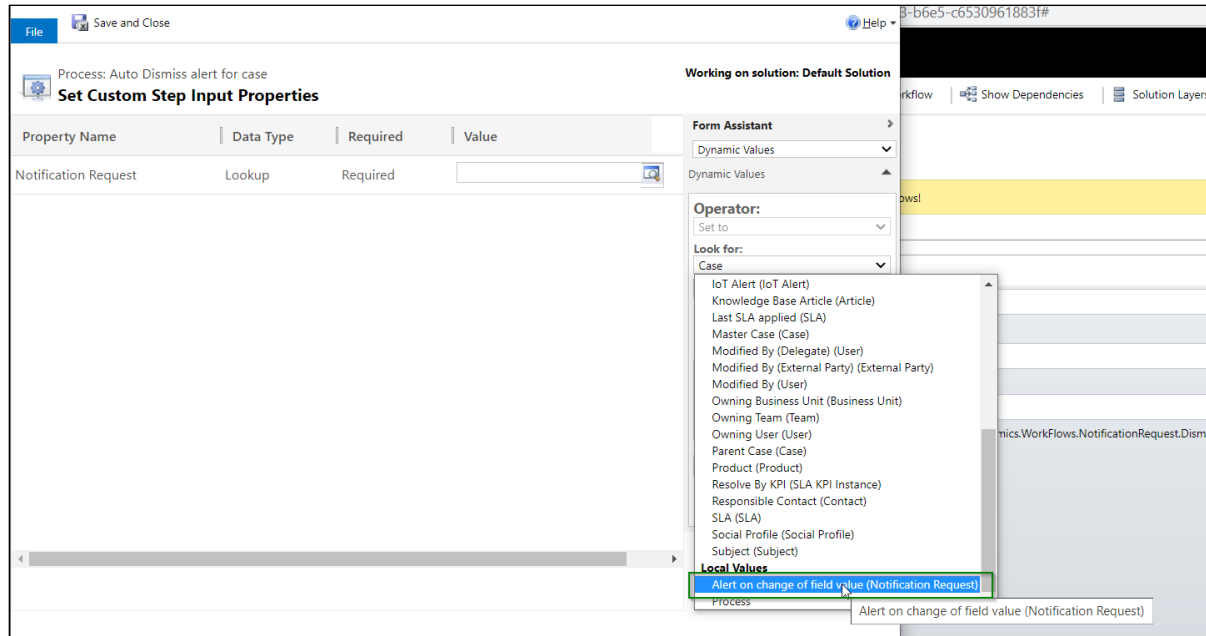


12) Click on 'Set Properties'.

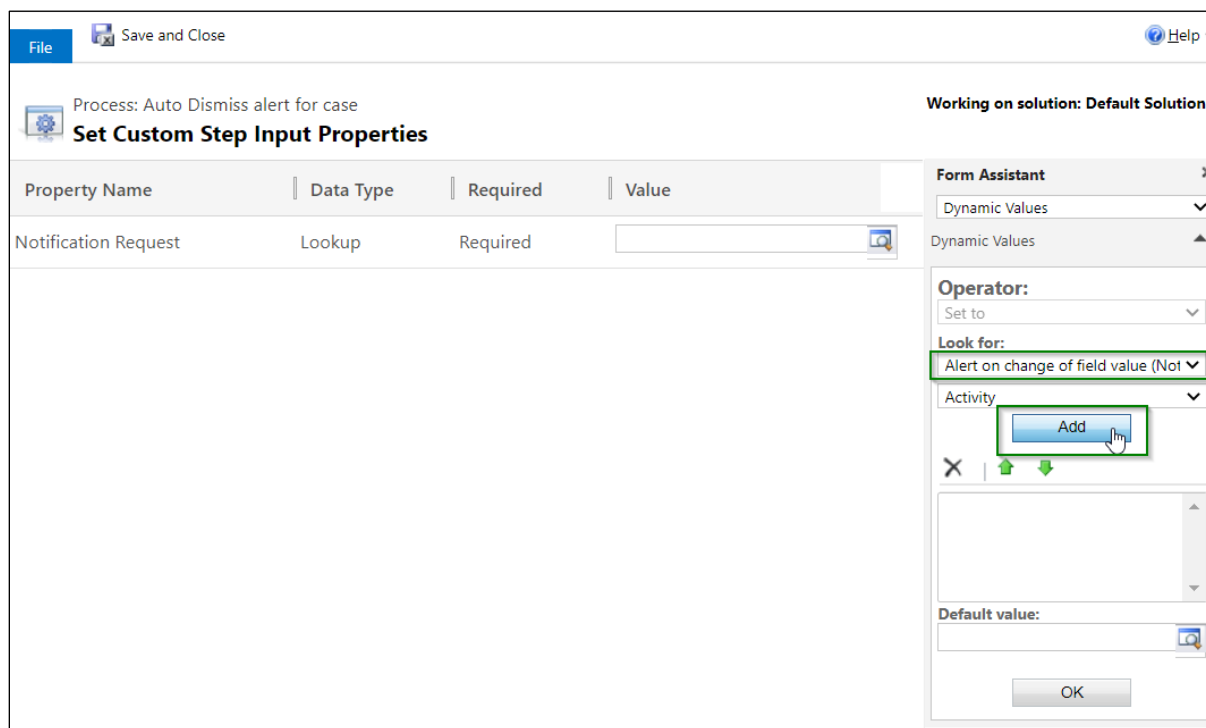


13) Select the below option from the list for 'Look for' field. This is a first step description that was added to create a notification request record.

Alerts4Dynamics – User Manual



14) Click on 'Add'.



15) Click on 'OK'.

File Save and Close Help

Process: Auto Dismiss alert for case
Set Custom Step Input Properties

Working on solution: Default Solution

Property Name	Data Type	Required	Value
Notification Request	Lookup	Required	

Form Assistant

Dynamic Values

Dynamic Values

Operator:
Set to

Look for:
Alert on change of field value (Not

Activity

Add

X | ↑ ↓

Activity(Alert on change of field val

Default value:

OK

File Save and Close Help

Process: Auto Dismiss alert for case
Set Custom Step Input Properties

Working on solution: Default Solution

Property Name	Data Type	Required	Value
Notification Request	Lookup	Required	{Activity(Alert on change of field v

Form Assistant

Dynamic Values

Dynamic Values

Operator:
Set to

Look for:
Alert on change of field value (Not

Activity

Add

X | ↑ ↓

Activity(Alert on change of field val

Default value:

OK

This list contains 1 records.

16) Click on 'Save and Close'.

File Save and Close Help

Process: Auto Dismiss alert for case **Set Custom Step Input Properties** Working on solution: Default Solution

Property Name	Data Type	Required	Value
Notification Request	Lookup	Required	{Activity(Alert on change of field v

This list contains 1 records.

Form Assistant

Dynamic Values

Dynamic Values

Look for:

Alert on change of field value (Not

Activity

Add

X | + -

Activity(Alert on change of field val

Default value:

OK

17) Next, activate the workflow.

File Save and Close Activate Convert to a real-time workflow Show Dependencies Solution Layers Actions

Process: Auto Dismiss alert for case with Field Change **Information**

We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!

Common

- Information
- Audit History
- Catalog Assignments
- Entities
- Entities
- Agent script steps
- Agent script steps
- Macro Run Histories
- Workflow Triggers
- Messages
- Messages
- Messages
- Chatbot subcompone...

Process Sessions

- Process Sessions

General **Administration** **Notes**

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)

Options for Automatic Processes

Scope: Organization

Start when:

☐ Record is created

☐ Record status changes

☐ Record is assigned

☒ Record fields change Select

☐ Record is deleted

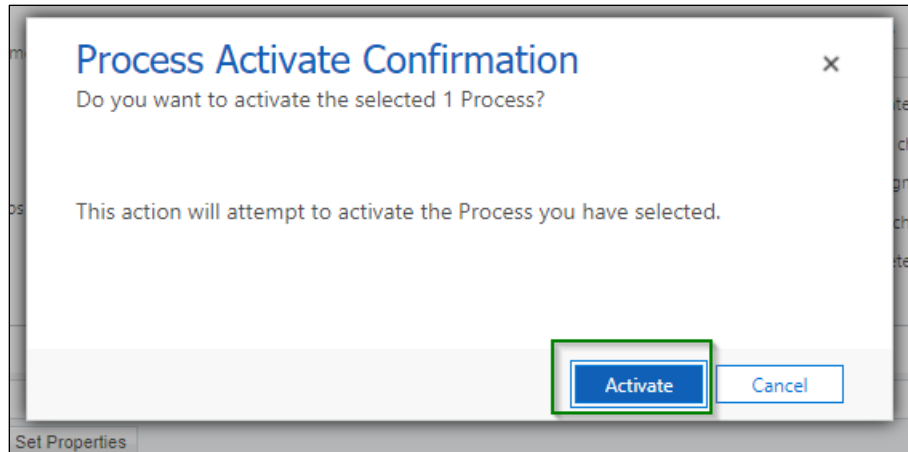
Add Step Insert Delete this step.

Create: Notification Request Set Properties

Wait until the case is resolved

Wait until Case:Status equals [Resolved], then:

Inlogic-Alerts4Dynamics.WorkFlows (1.0.0.0):DismissNotification Set Properties



18) Navigate back to **Case** → **Open** a case record → **Change** the value of the field '**Subject**'.

Sales Hub

← Show Chart + New Case Delete Refresh Run Report Email a Link Flow

Active Cases ▾

Case Title ↑ ▾	Case Number ▾	Priority ▾	Origin ▾	Customer ▾
Average order shipment time	CAS-01213-P8B3X0	Normal	Web	Ultimate
Contact details requested	CAS-81215-457113	Normal	Email	A. Zlatkov
Customer Contact Information	CAS-81215-457112	Normal	Email	Blue Yonder Retail
Delivery never arrived	CAS-81215-458504	Low	Phone	Alpha-Gal Retail
Dysfunctional (Shawn Laptop Keyboard FMS)	CAS-88855-V8U717	Normal	Web	Graphic Design Institut
Faulty product catalog	CAS-81223-440384	Normal	Email	NorthCo Coffee
Incorrect product information online	CAS-81223-440250	High	Email	Ultimate
Information on the product	CAS-81223-254191	Low	Email	Consolidated Mining
Item defective on delivery	CAS-88285-457114	High	Twitter	Robitronics, Inc.
Maintenance Information for Desktop PCs	CAS-81223-057182	Low	Email	NorthCo Coffee

19) Change the subject from '**Delivery**' to '**Query**'.

AO

Average order shipment time

Case · Case ▾

Phone to Case Process

Active for 29 days

Identify

Summary

Case Relationships

Associated Knowledge Records

Enhanced SLA Details

Case Title

* Average order shipm...

ID

CAS-01213-P8B3X0

Subject

Delivery

Customer

Origin

Web

Priority

Normal

Search timeline

Enter a note...

CG

Phone Call from

Call the customer with relevant in

Schedule an appointment with th

Active

Auto-post on Average order

Case: Created by

AO

Average order shipment time

Case · Case ▾

Phone to Case Process

Active for 29 days

Identify

Research (29 D)

Summary

Case Relationships

Associated Knowledge Records

Enhanced SLA Details

Additional Details

Social Details

Case Title

* Average order shipm...

ID

CAS-01213-P8B3X0

Subject

Query ▾

Customer

* Litware

Origin

Web

Priority

Normal

Search timeline

Enter a note...

CG

Phone Call from

Call the customer with relevant information

Schedule an appointment with the customer. Capture prelimin...

Active

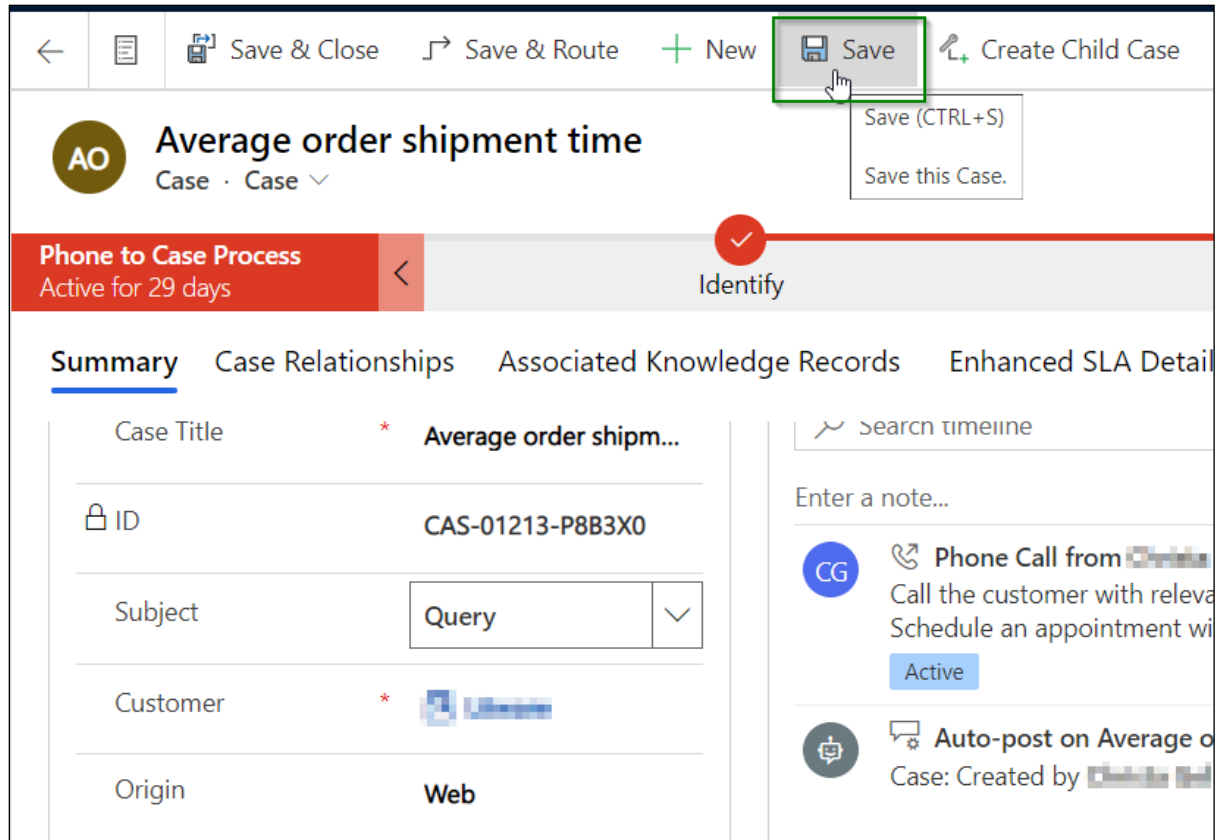
9/6/2020 8:31 PM ▾

Auto-post on Average order shipment time

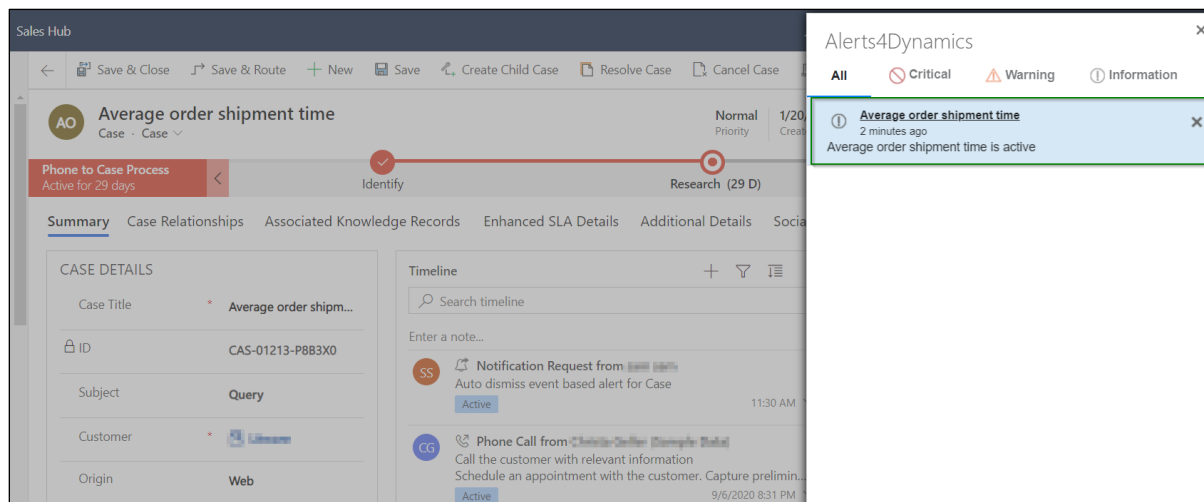
Case: Created by

9/6/2020 8:30 PM ▾

20) Click on 'Save'.



21) Once saved successfully, an alert will be shown as a **Dialog** on the case record. It will continue showing up until the case is resolved.



22) Now, let's mark this case record as resolved.

Alerts4Dynamics – User Manual

Sales Hub

Save & Close Save & Route New Save Create Child Case **Resolve Case** Cancel Case Add to Queue

AO Average order shipment time
Case · Case ▾ Normal Priority 1/20/2017 10:50 PM Created On

Phone to Case Process Active for 29 days < Identify Research (29 D)

Summary Case Relationships Associated Knowledge Records Enhanced SLA Details Additional Details Social Details Article

CASE DETAILS

Case Title	* Average order shipm...
ID	CAS-01213-P8B3X0
Subject	Query
Customer	* [Customer Icon]

Timeline

Search timeline

Enter a note...

- SS Notification Request from [User] Auto dismiss event based alert for Case Active 11:30 AM ▾
- CG Phone Call from Christa Geller (Sample Data) Call the customer with relevant information

Resolve Case

There are open activities associated with this case. The open activities will be cancelled if you resolve this case. Do you want to resolve the case?

Confirm Cancel

Resolve Case

Resolution Type

Problem Solved

Resolution

Resolved

Total Time

0 minutes

Billable Time

15 minutes

Remarks

Resolve

Cancel

23) Once the case is resolved, the alert is dismissed automatically.

Read-only This record's status: Resolved

AO

Average order shipment time

Case - Case

Normal

1/20/2017 10:50 PM

Problem Solved

Phone to Case Process

Identify

Research (29 D)

Resolve

Summary

Case Relationships

Associated Knowledge Records

Enhanced SLA Details

Additional Details

Social Details

Articles and Contract Information

Field Service

Related

CASE DETAILS

Case Title

Average order shipment time

ID

CAS-01213-P8B3X0

Subject

Query

Customer

Origin

Web

Priority

Normal

Contact

Entitlement

Timeline

Search timeline

Enter a note...

Auto-post on Average order shipment time

Case: Closed by [User] for Account [Account]

11:38 AM

Resolved by [User]

Resolved

11:38 AM

Phone Call from [User]

Call the customer with relevant information

Schedule an appointment with the customer. Capture preliminary customer and produ...

Closed

11:38 AM

Notification Request from [User]

CUSTOMER DETAILS

Liware

Email

Phone

RECENT CASES

No data available.

Entitlement

Note: Auto-dismiss feature is not applicable for Announcement and Record-based alert(s) as they do not put on any specific condition/rule unlike Rule-based alerts.

Alerts4Dynamics Logs

This contains the log of errors that occur while enabling Entity Configuration as well as while creating Notifications. To view the logs, go to **Alerts4Dynamics App → Alerts4Dynamics Logs**

Active Logs			
Entity Name	Process	Entity Schema Name	Created On
---	ReTriggerCreateNotifications	---	02-06-2020 20:01
---	ReTriggerCreateNotifications	---	02-06-2020 04:01
---	ReTriggerWorkflows	---	01-06-2020 12:00

Notify Failure Configuration

Notify failure will notify the defined users in **'Notify Failure'** setting if there are any failure during creation of notification like incorrect configuration or other similar reasons.

If there are any notification failures, then daily a mail will be sent out to the defined users in the setting.

Given below is the step to enable notify failure:

When the user clicks on the **'Activate'** button on License Registration form, **'Configuration Record'** is automatically created and becomes visible under **'Configuration'** entity of Alerts4Dynamics.

After the creation of that record, user can set the Notify Failure (two Options field) value **Yes** or **No** in that record.

By default the field is set as **'No'**, which means no notification mails about the error logs will be sent.

A4D Configuration

Configuration

General Notify Failure Related

Notify Failures
No

When **'Yes'** option is selected, user can see two fields **'To'** and **'From'** which defines to whom the error logs will be send and from whom they will receive the error logs. Here, the error logs contain all the failures in Alerts4Dynamics process and its details in a table format. The error logs will be sent daily at **12:00 am** to users mentioned in **'To'** field.

A4D Configuration
Configuration

General **Notify Failure** Related

Notify Failures **Yes**

From *

Jane Doe

To *

× John Watson

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