



White Paper

Alerts4Dynamics - White Paper

Aim:

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

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

Features:

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

Supported Versions

Versions: Microsoft Dynamics 365 v9.x and above, Power Apps & CDS.

Deployment Models: On-Premises and Online.

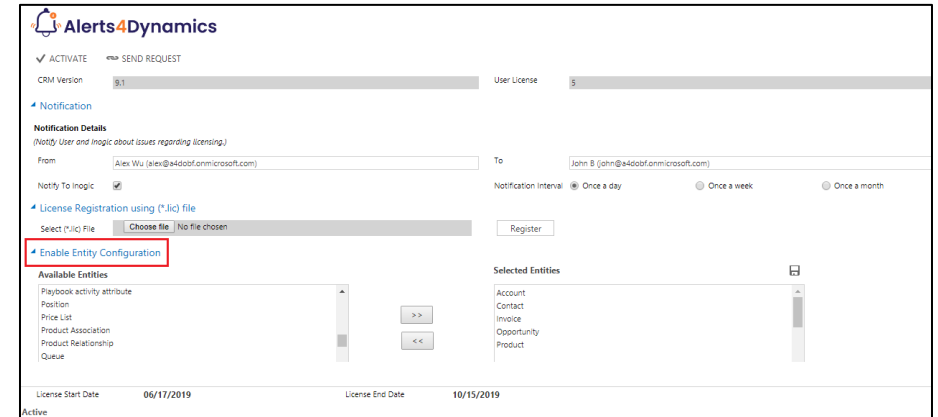
Who needs it?

Alerts4Dynamics enables managers in Dynamics 365 CRM to create and schedule alerts for users. This notifies the users with the information they need to be updated within their CRM. It allows the users to stay active and be in sync with the entire

business process by being up-to-date with their ongoing process, deals and external factors that may have an influence on their strategy.

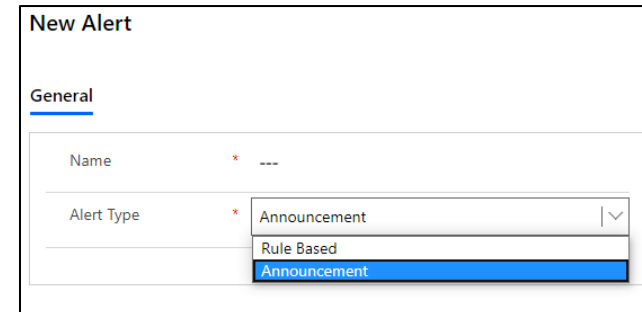
Entity Configuration

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



Alert Types

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



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Alert Level

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

New Message

General Notification

Notification Message

Message Text * ---

Notification Configuration

Alert Level * --Select--
Display Until
Warning
Information
Critical

Define Mode of Alert

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

Notification Configuration

Alert As * Select or search options
Display Until
Is Dismissible
Notification Audience

☐ Select all 4 items
☐ Pop-Up
☐ Form Notification
☐ Email Notification
☐ User Preference

Define Audience

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

Notification Audience	
Include Users	<input checked="" type="checkbox"/> Owning User <input checked="" type="checkbox"/> Owning User:Manager
Exclude Users	<input checked="" type="checkbox"/> Walter White
Security Roles	
Teams	

Multiple Languages

Alert messages can be sent in multiple languages.

Der Account {name} wurde aktualisiert.

Language

General Related

Message * Der Account {name} wurde aktualisiert.

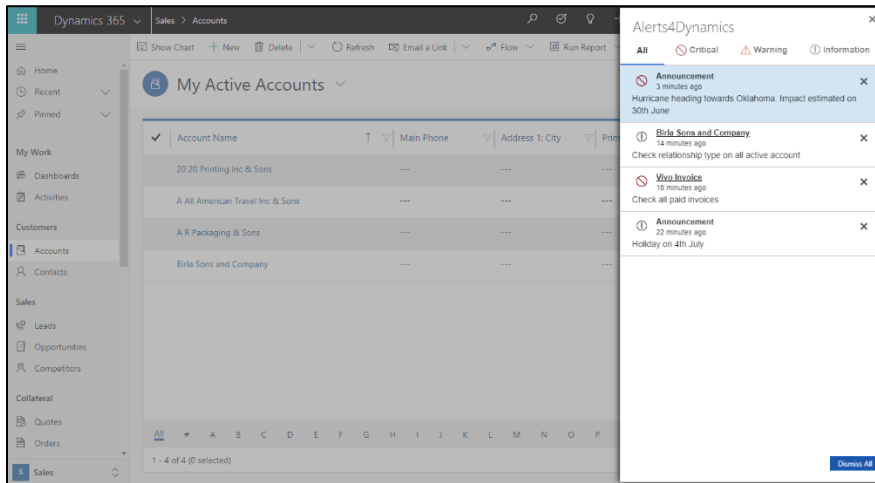
Language * German
German
French
Hebrew

Notification Message *  Update Account Message

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View Notifications

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



View Log

View log of alerts read/dismissed by users.

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

Contact Us:

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