

# User Guide



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*Solution Version: 2016365\_062017\_0\_0*



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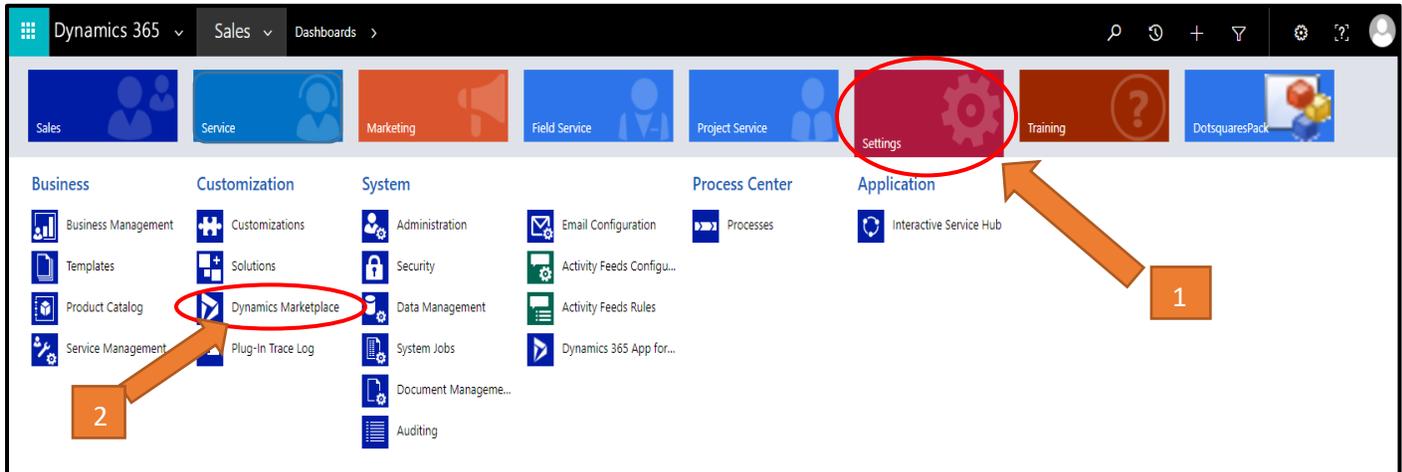
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## How to Install Alerts in your Dynamics 365 CRM?

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

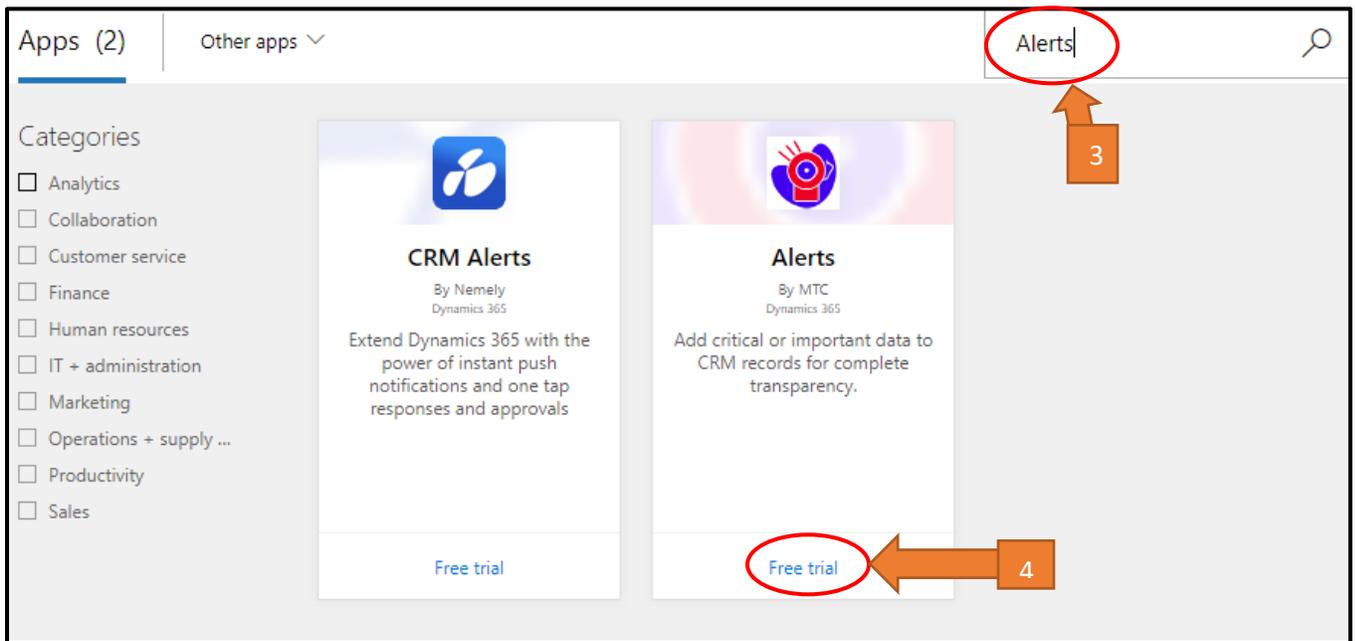
### Step 1:

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



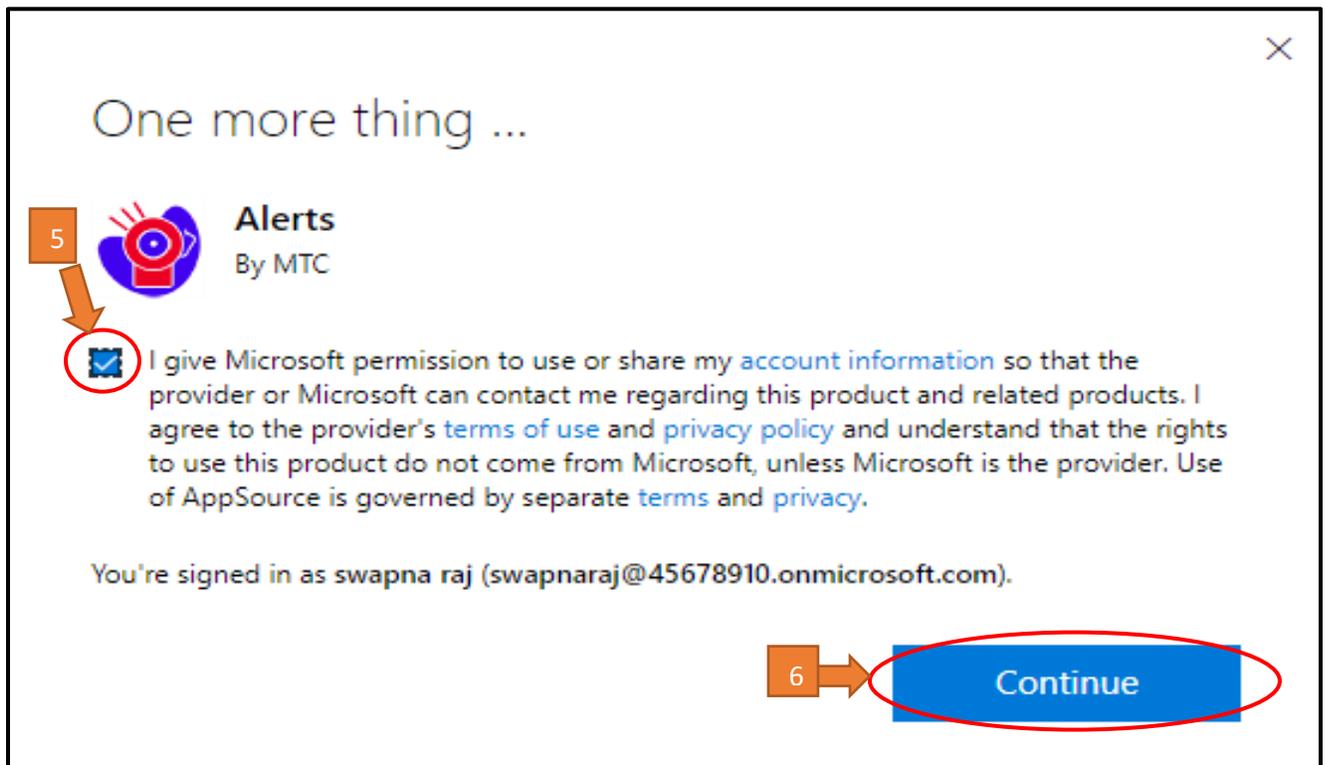
### Step 2:

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



### Step 3:

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



### Step 4:

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

Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365  
 Organization to add the application to: MTC (orge03d5402)

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

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

7

8

Agree Cancel

**Step 5:**

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

Select a preferred solution to manage on selected instance: mtc

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

### Step 6:

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

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

### Step 7:

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

#### ACCOUNT INFORMATION

First Name* <input type="text" value="Harish"/>	Last Name* <input type="text" value="Kumar"/>
Phone* <input type="text" value="1234567892"/>	Company* <input type="text" value="MTC"/>
Website* <input type="text" value="www.mtccrm.com"/>	Email* <input type="text" value="marothiamohit.1998@gmail.com"/>
City* <input type="text" value="hyderabad"/>	State/Province* <input type="text" value="telengana"/>
Country* <input type="text" value="india"/>	Zip/Postal Code* <input type="text" value="500050"/>

**Step 8:**

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

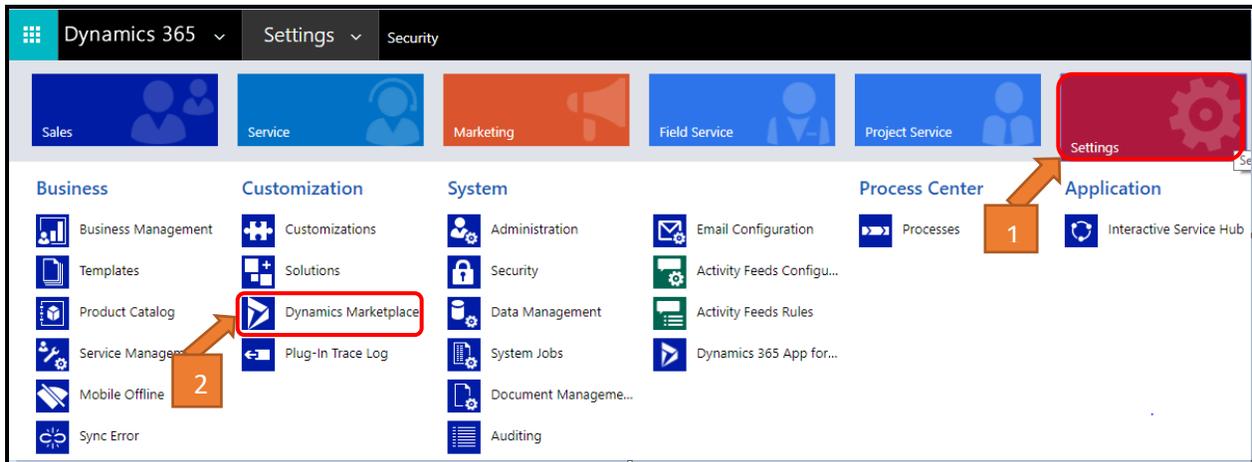
CRMStarterPack				<a href="#">Purchase As Bundle</a>	<a href="#">Update License</a>
	Activity Calendar		<a href="#">Get it Now</a>		
	Alerts		Installed	<a href="#">Purchase License</a>	<a href="#">Update License</a>
	CRM Picture		<a href="#">Get it Now</a>		
	Report To PDF		<a href="#">Get it Now</a>		
	Auto Number		Installed	<a href="#">Purchase License</a>	<a href="#">Update License</a>
	Note Pro		<a href="#">Get it Now</a>		

## Security Roles for Alerts

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

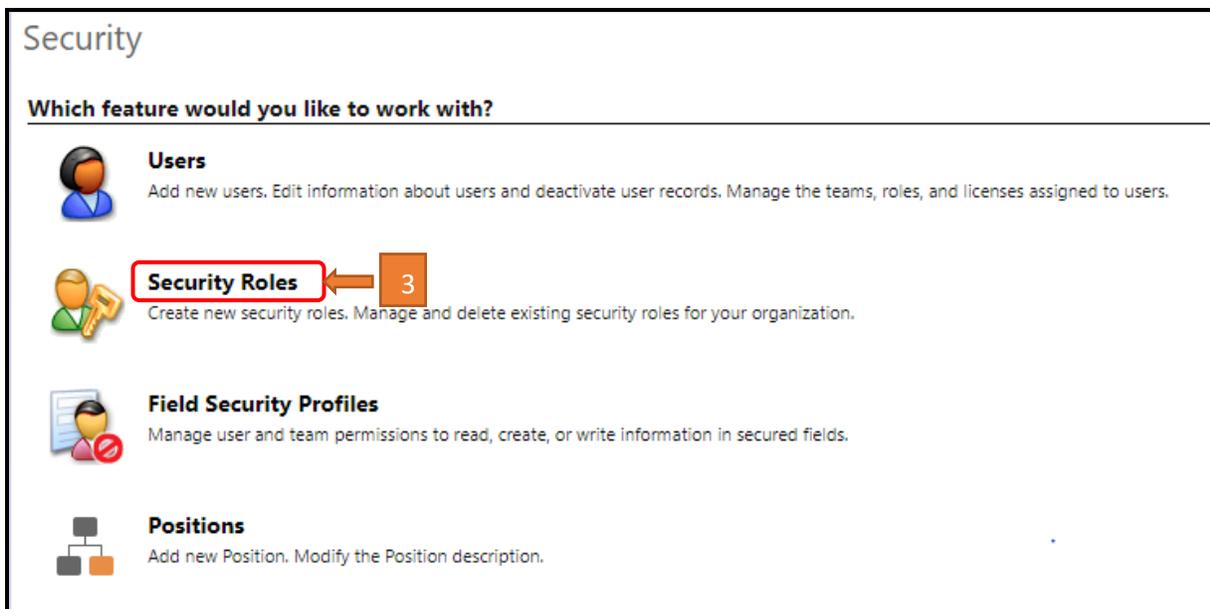
### Step1:

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



### Step2:

- Click on **Security Roles**.



### Step3:

- Tick on MTC Alerts checkbox.

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

### Step4:

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

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Account Project Price List	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Activity Timer Settings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Actual	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Actual Data Export (Deprecated)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Booking Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Booking Incident	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Booking Product	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Booking Service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Booking Service Task	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Booking Setup	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Invoice Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Invoice Product	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Invoice Setup	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Sub-Status	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Alert	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>				
Alert Setting	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>				
Batch Job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



**Step5:**

➤ Tick the MTC Alerts Manager checkbox.

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



**Step6:**

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

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Account Project Price List	<input type="radio"/>							
Activity Timer Settings	<input type="radio"/>							
Actual	<input type="radio"/>							
Actual Data Export (Deprecated)	<input type="radio"/>							
Agreement	<input type="radio"/>							
Agreement Booking Date	<input type="radio"/>							
Agreement Booking Incident	<input type="radio"/>							
Agreement Booking Product	<input type="radio"/>							
Agreement Booking Service	<input type="radio"/>							
Agreement Booking Service Task	<input type="radio"/>							
Agreement Booking Setup	<input type="radio"/>							
Agreement Invoice Date	<input type="radio"/>							
Agreement Invoice Product	<input type="radio"/>							
Agreement Invoice Setup	<input type="radio"/>							
Agreement Sub-Status	<input type="radio"/>							
Alert	<input checked="" type="radio"/>							
Alert Setting	<input checked="" type="radio"/>							
Batch Job	<input type="radio"/>							

**Step7:**

- Click on **Users**.

### Security

**Which feature would you like to work with?**



**Users**



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



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



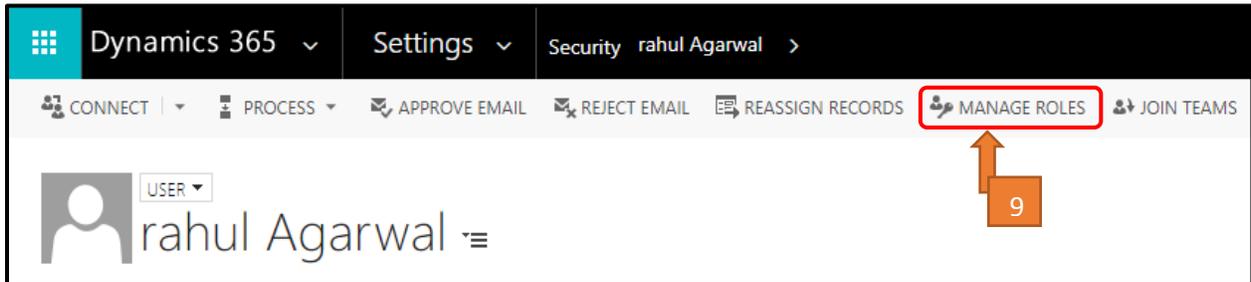
**Field Security Profiles**  
Manage user and team permissions to read, create, or write information in secured fields.



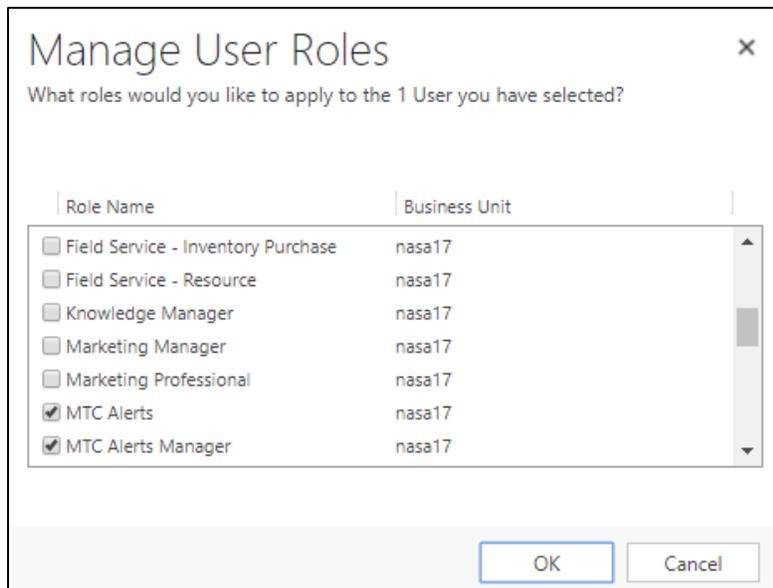
**Positions**  
Add new Position. Modify the Position description.

**Step8:**

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



**Step9:**



**Notes:**

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

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

## How to Configure Alerts in your Dynamics 365 CRM?

### Step 1:

- Navigate to **Dynamic365 -> Settings -> Solutions**. You will find Alerts and Click on Alerts.

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

### Step 2:

- Click on **Alerts Settings**.

### Alerts Configuration

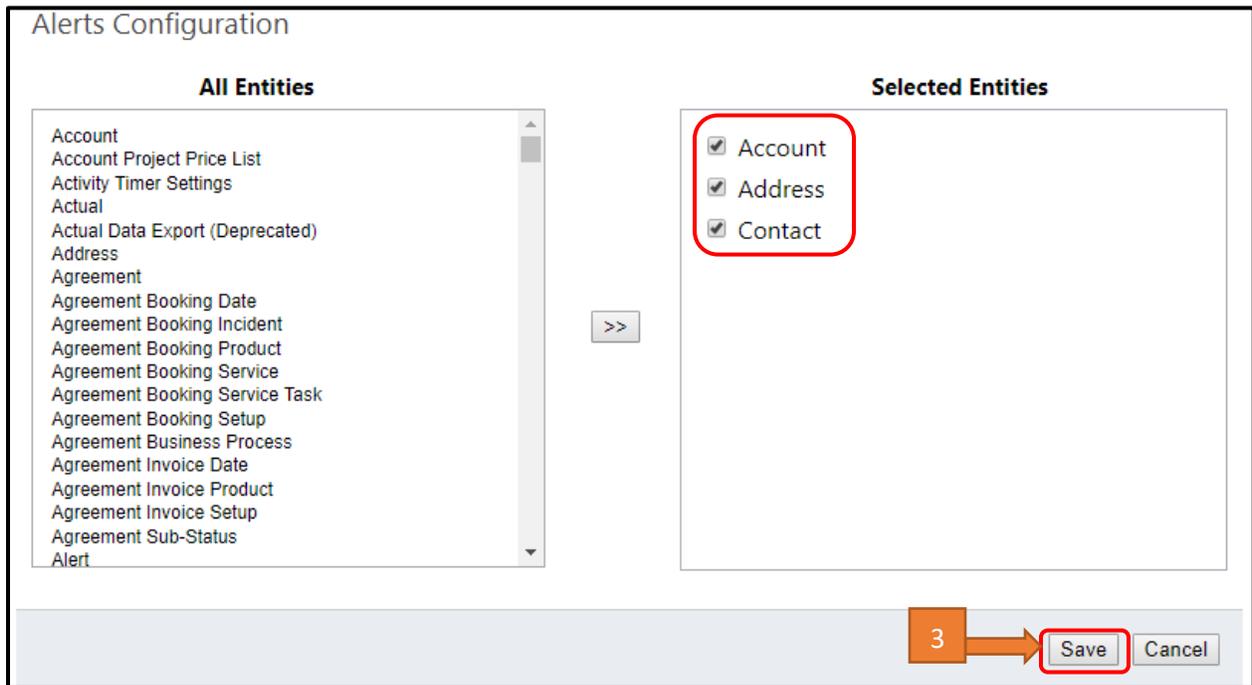


**Alerts Settings**

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

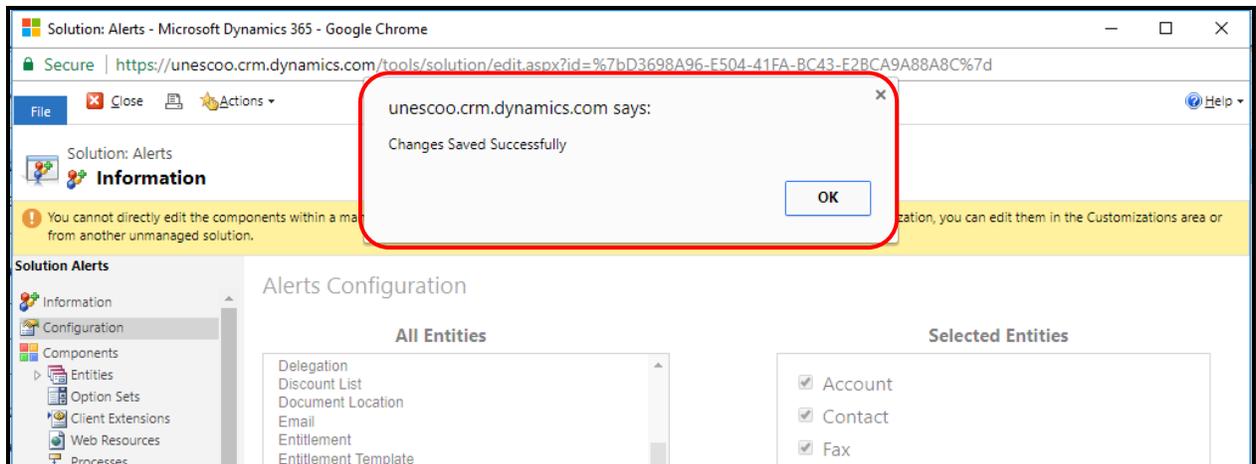
### Step 3:

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



**Step4:**

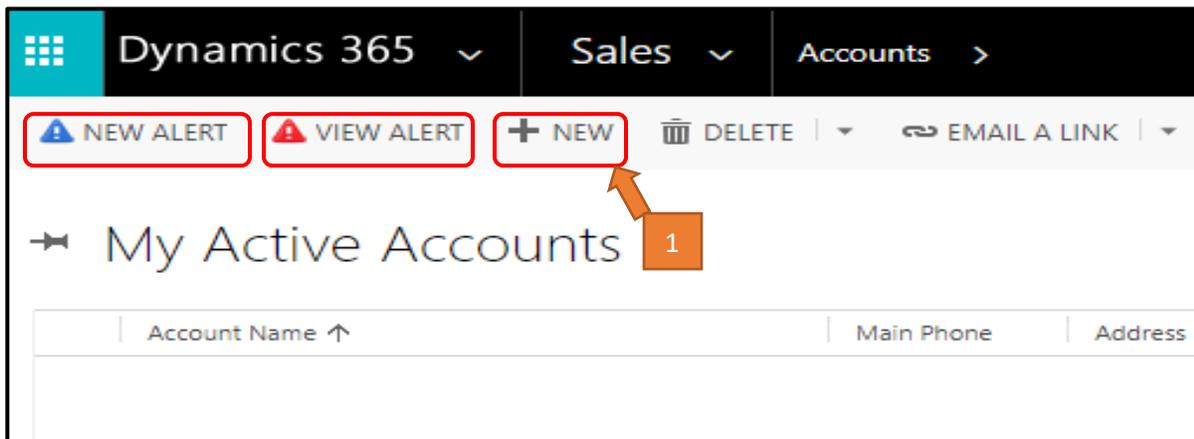
- After clicking on save button, **Changes Saved Successfully** popup message will come.



## Alerts Functionality

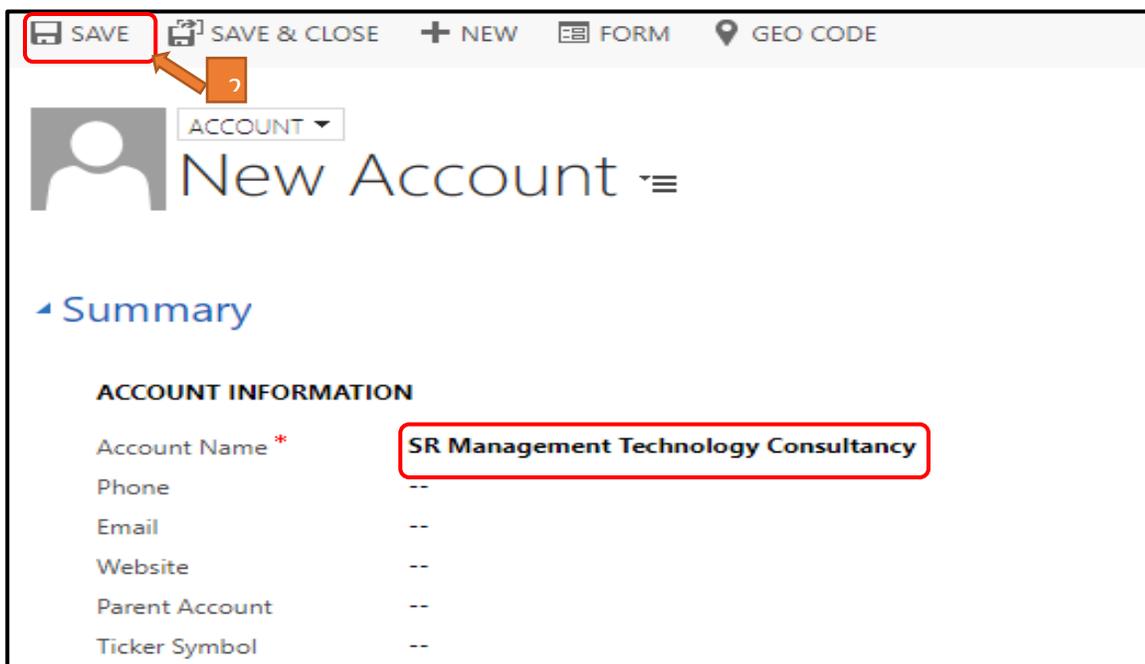
### Step 1:

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



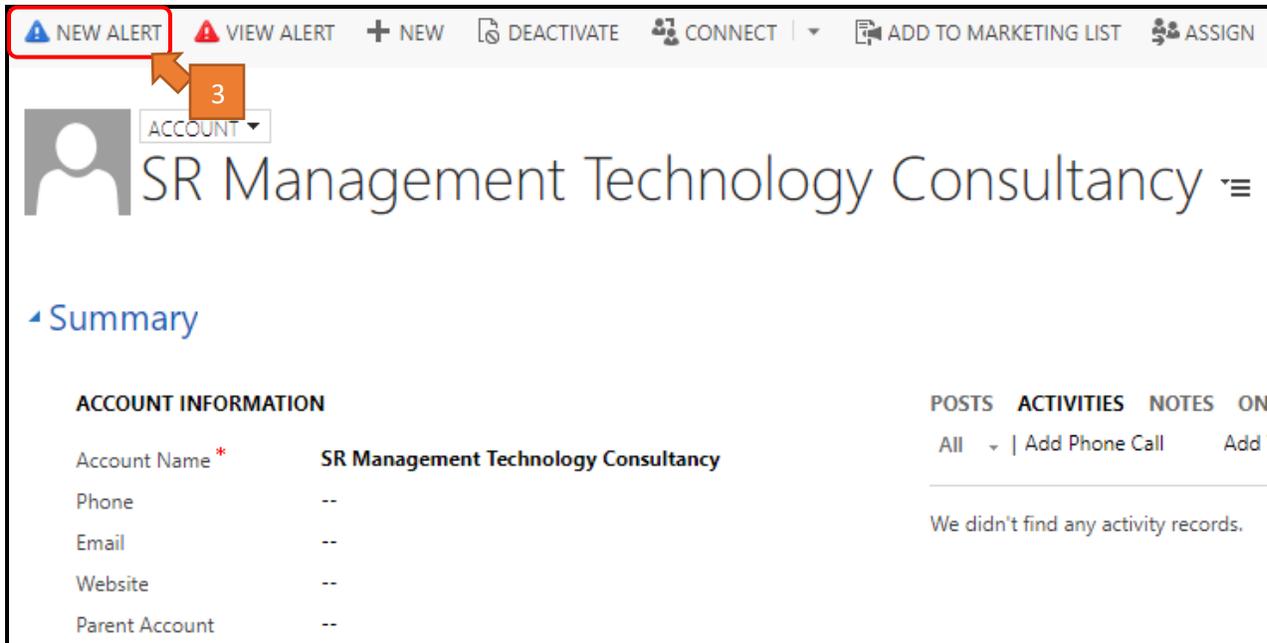
### Step 2:

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



### Step 3:

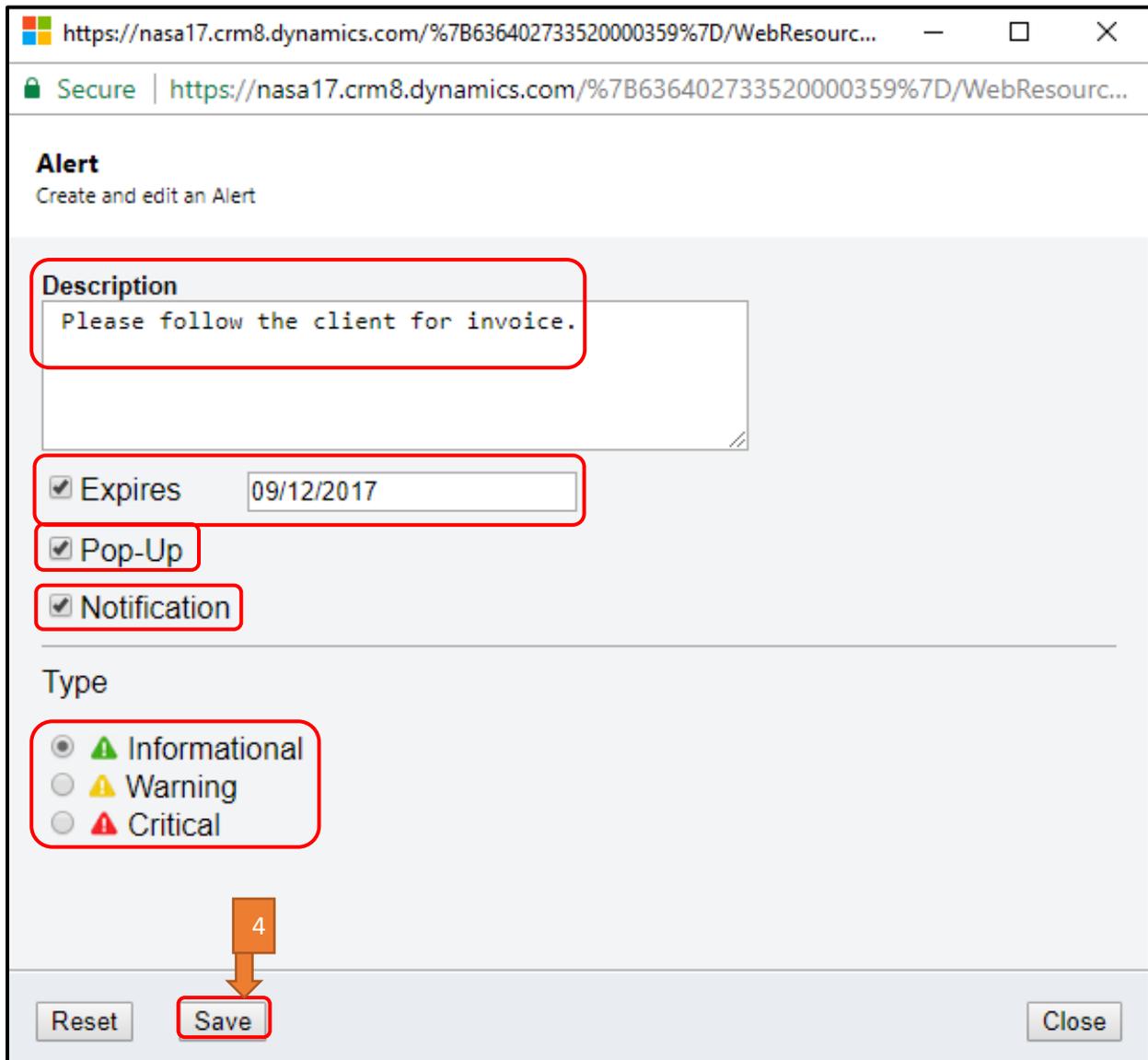
- Now you can see the **New Alert** and **View Alert** for which you created account.
- Click on **New Alert**.



### Step 4:

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

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



Alert  
Create and edit an Alert

Description  
Please follow the client for invoice.

Expires 09/12/2017

Pop-Up

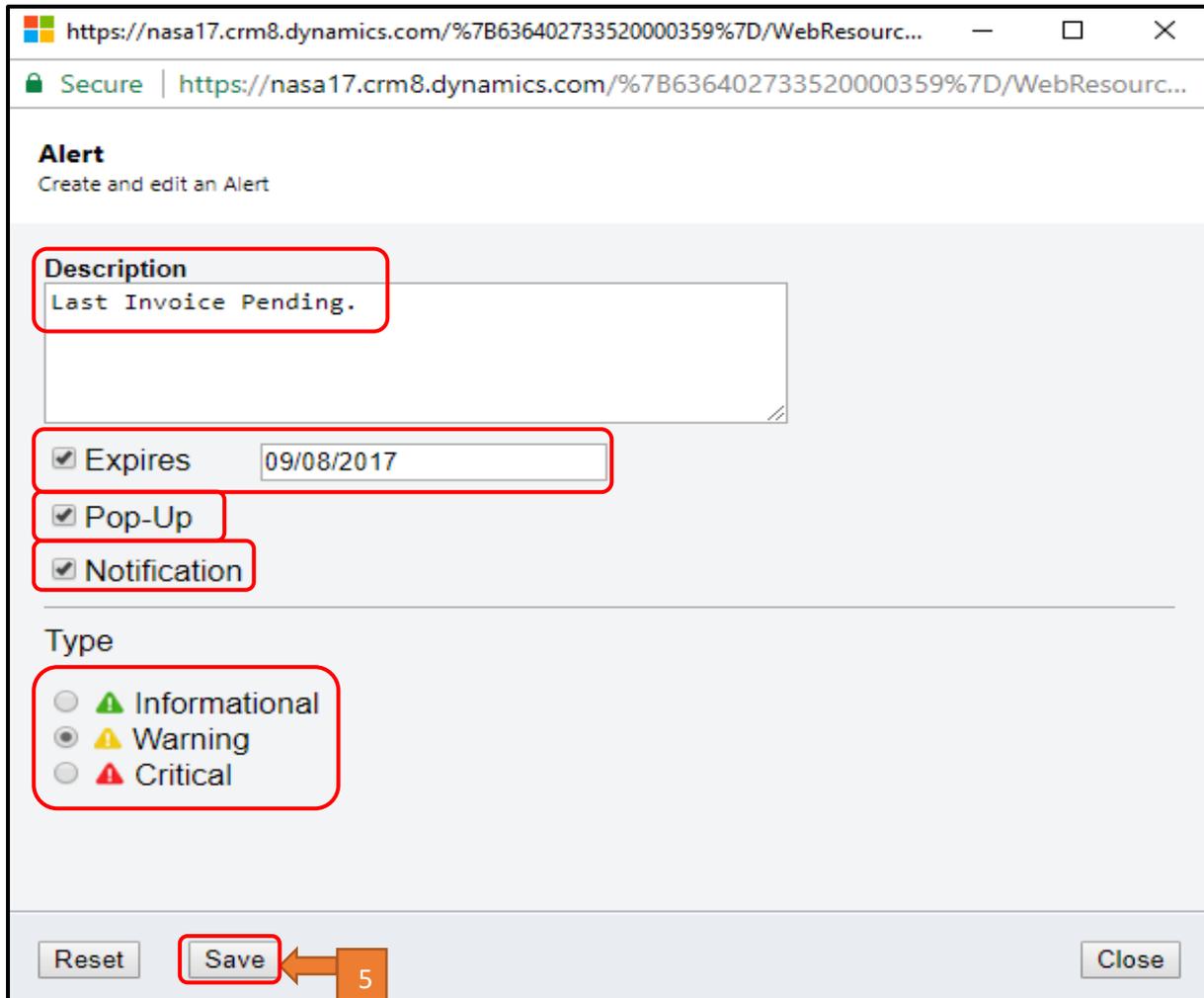
Notification

Type

Informational  
 Warning  
 Critical

Reset Save Close

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



Alert  
Create and edit an Alert

**Description**  
Last Invoice Pending.

Expires 09/08/2017

Pop-Up

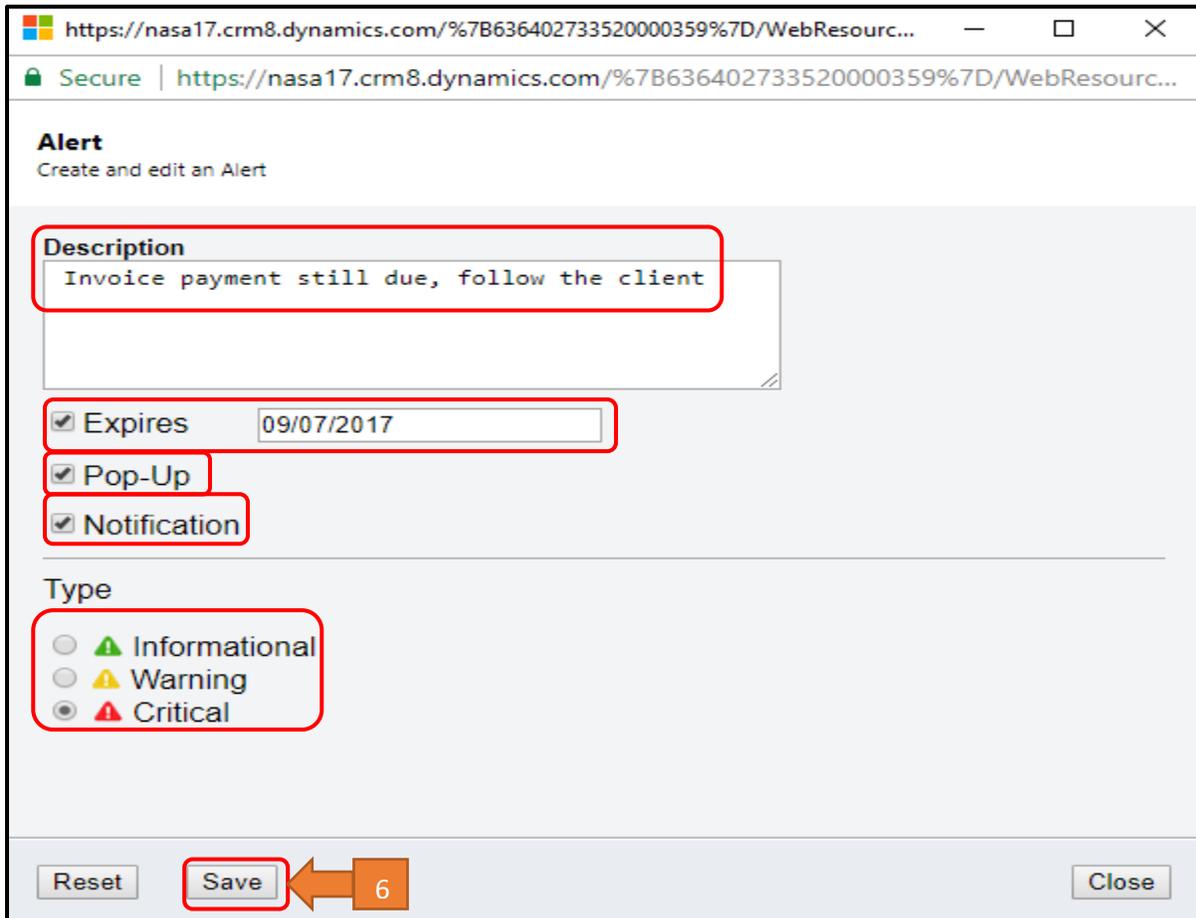
Notification

**Type**

Informational  
 Warning  
 Critical

Reset Save Close

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



Alert  
Create and edit an Alert

Description  
Invoice payment still due, follow the client

Expires 09/07/2017

Pop-Up

Notification

Type

Informational

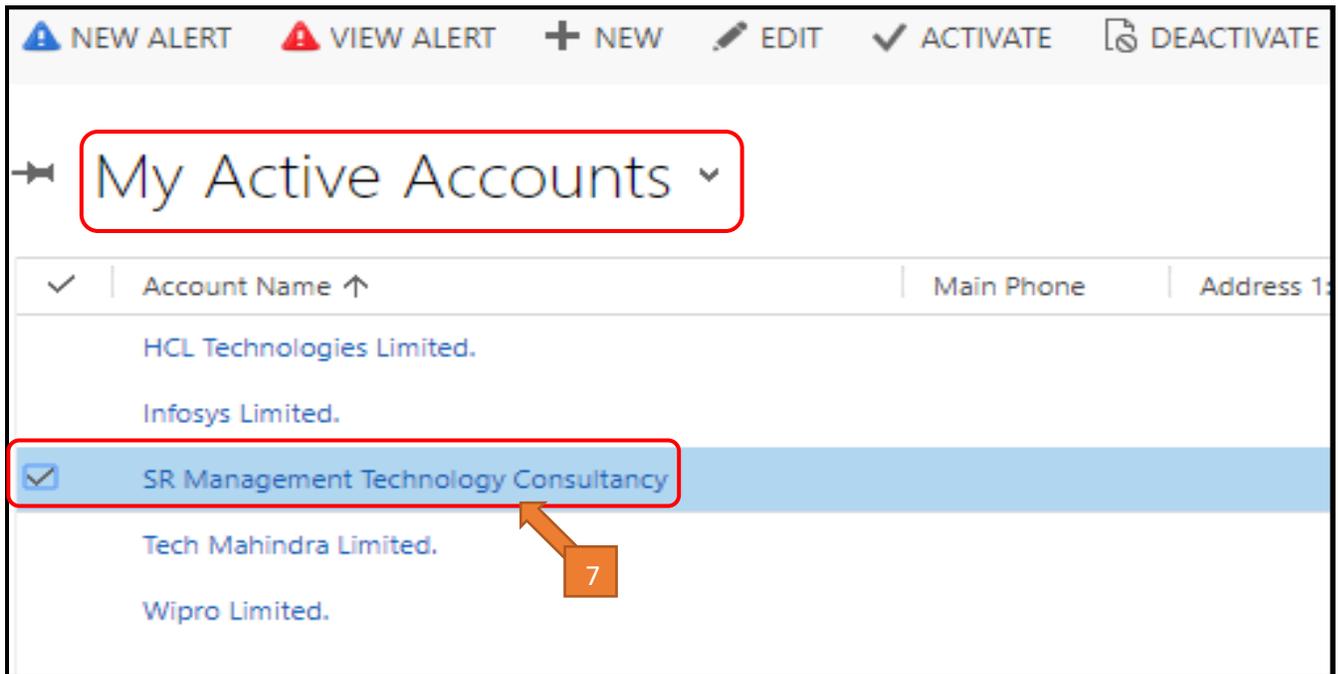
Warning

Critical

Reset Save Close

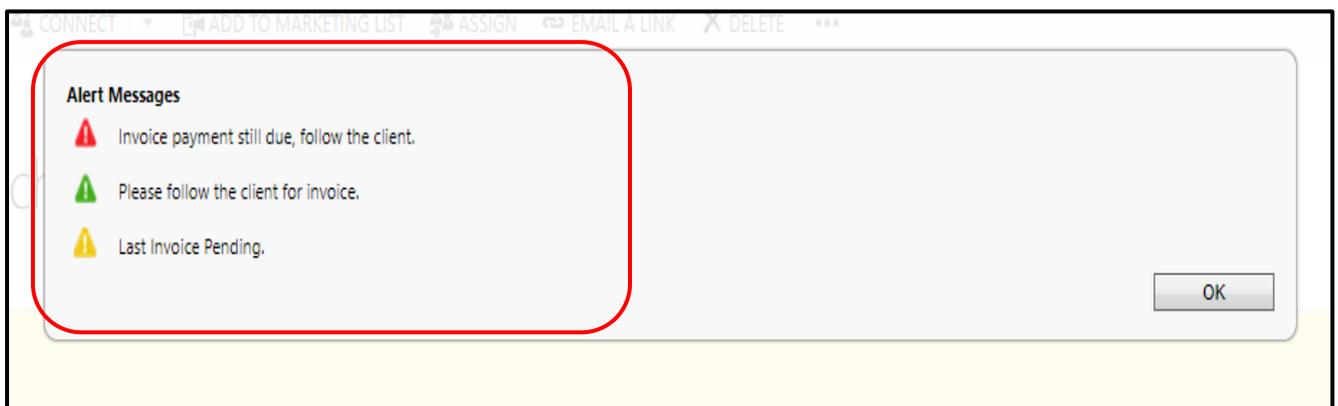
**Step 5:**

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



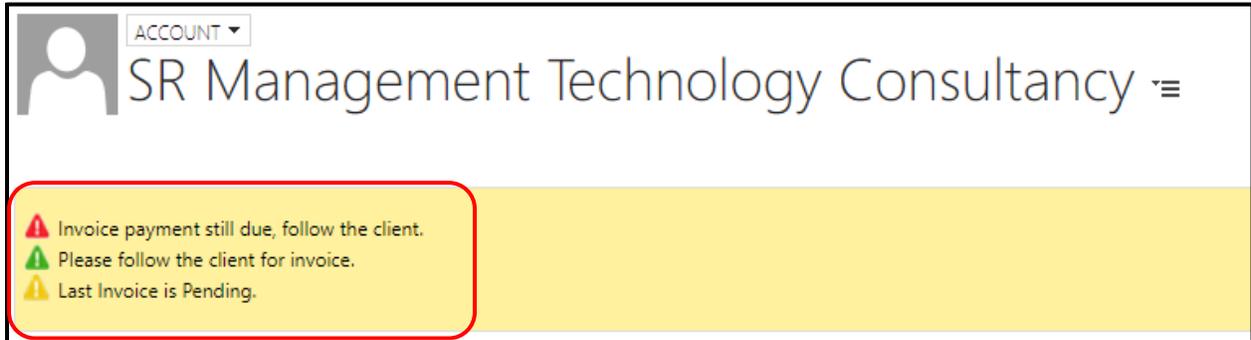
**Step 6:**

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



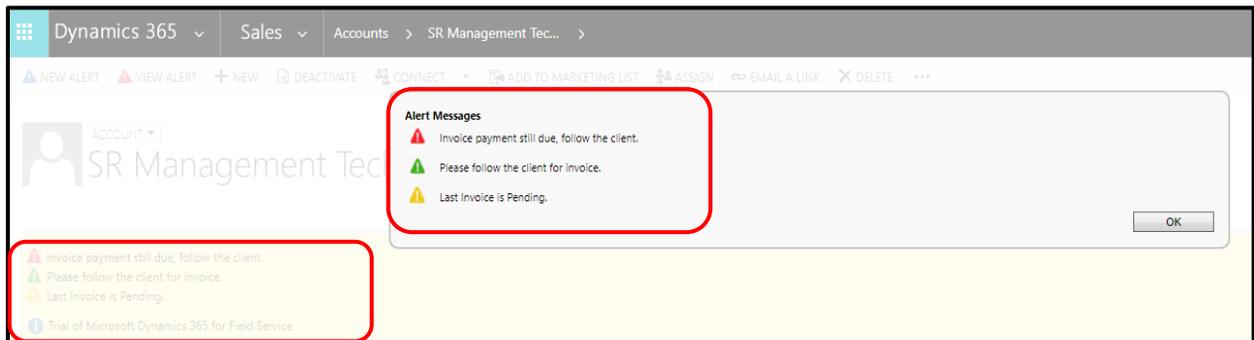
### Step 7:

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



### Step 8:

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



## View Alert

### Step 9:

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

### Filter Alerts By:

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

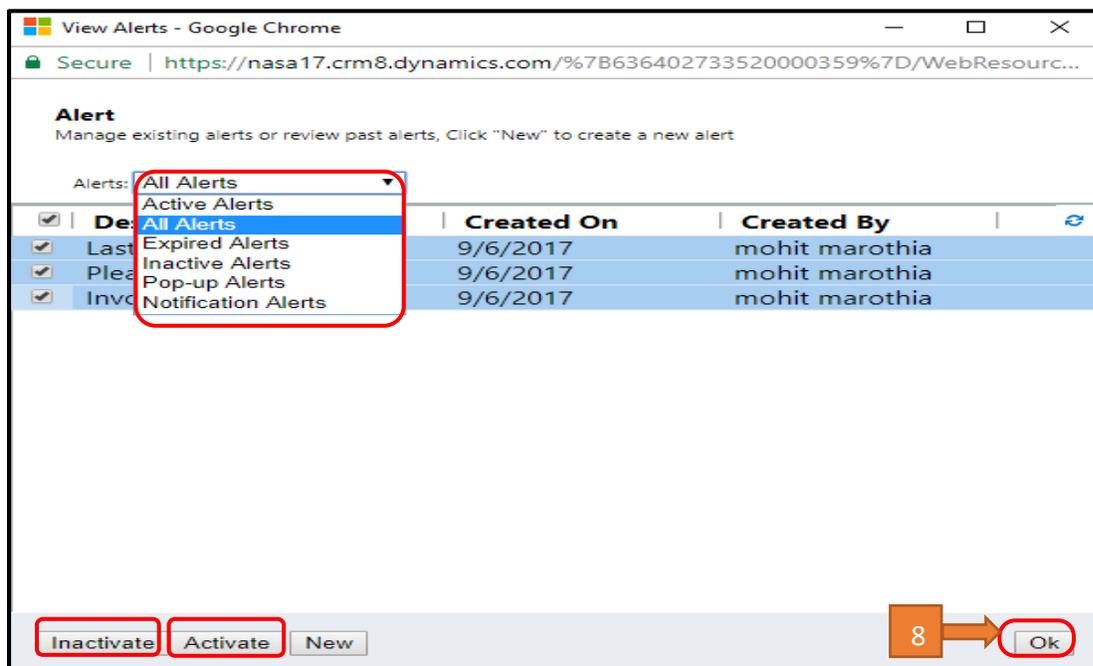
**All Alerts:** Allow the user to see all alerts.

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

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

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

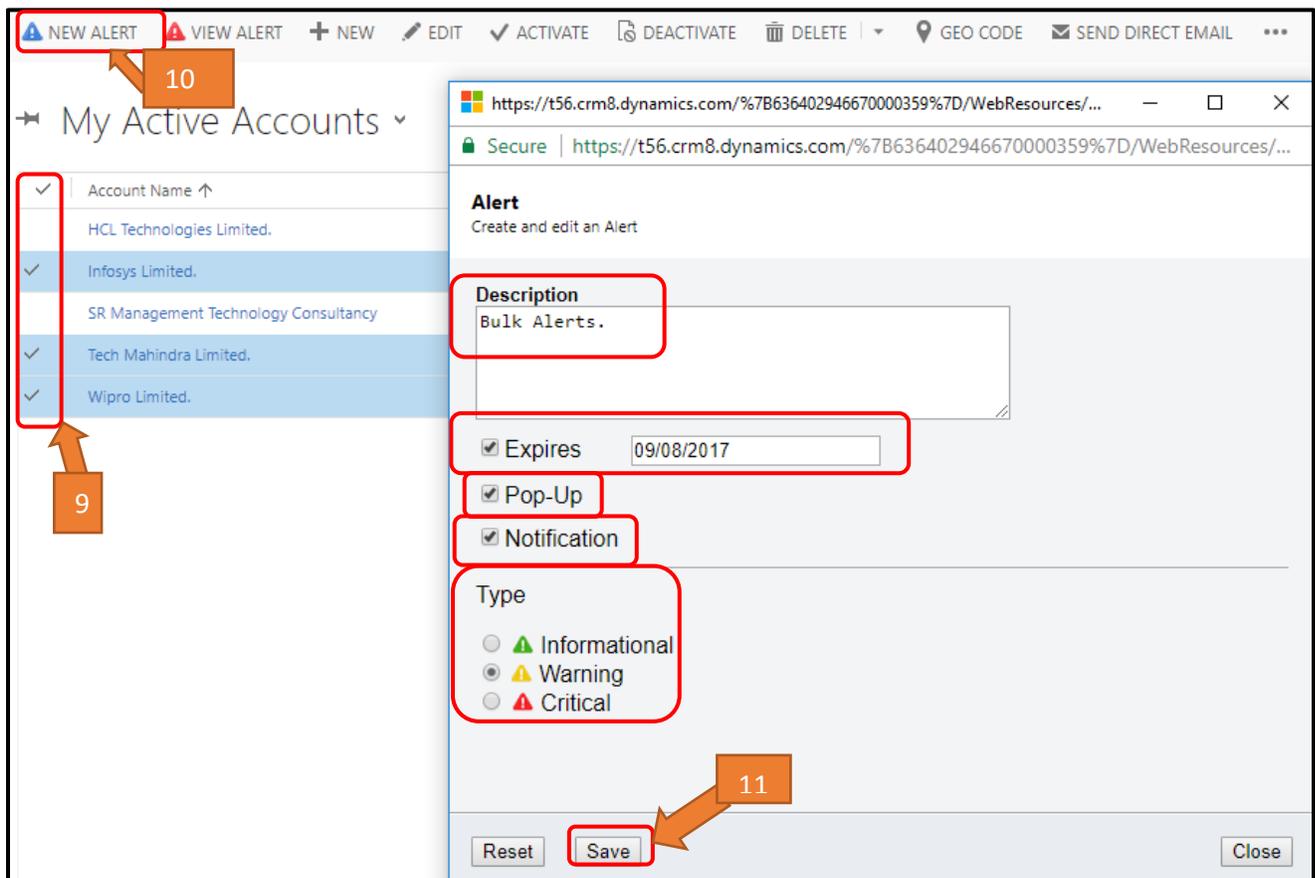
**Notification Alerts:** Allow the user to see all notification alerts.



## Bulk New Alerts

### Step 10:

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



The screenshot displays the 'Alert' configuration form in Microsoft Dynamics CRM. The form is titled 'Alert' and includes the following fields and options:

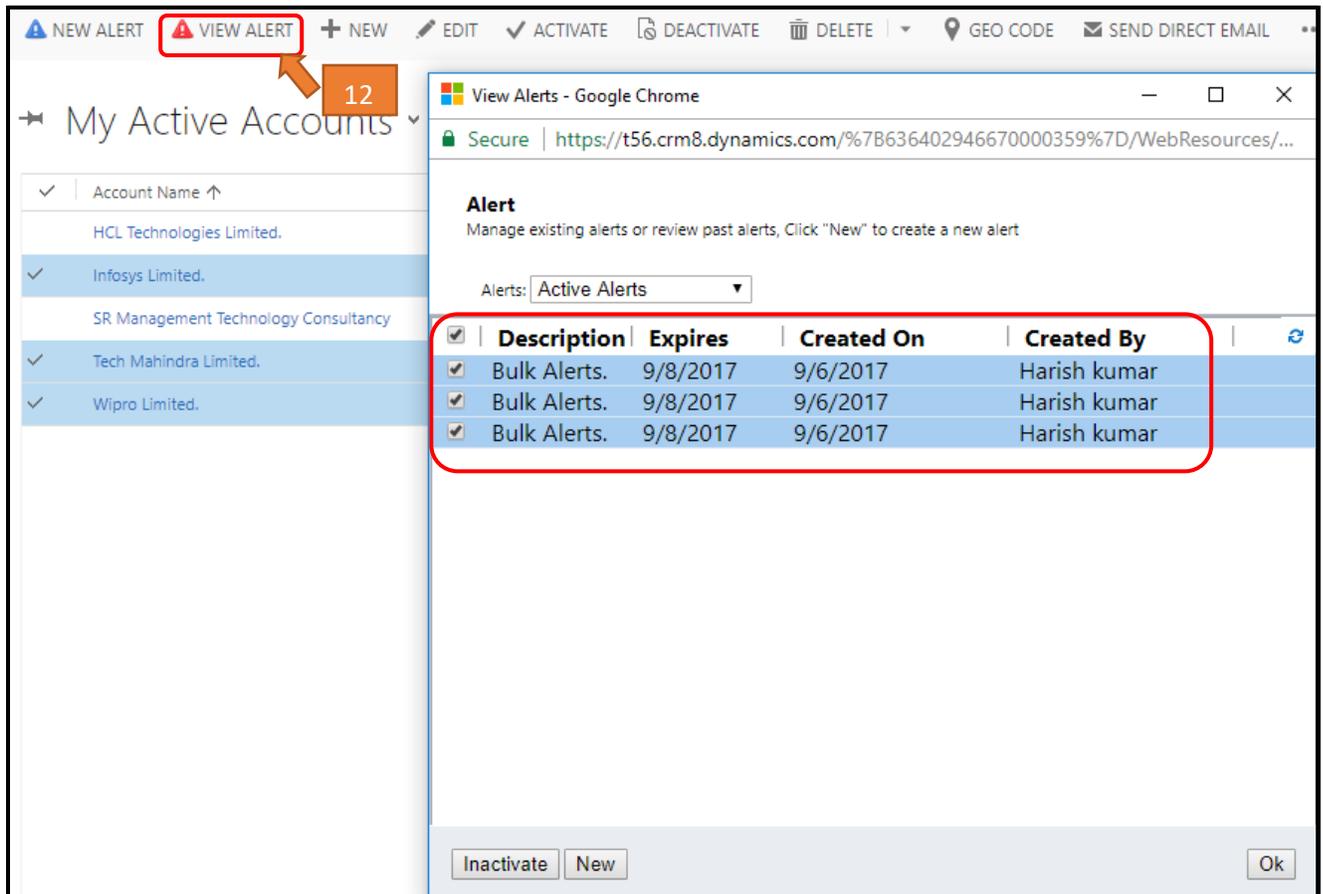
- Description:** A text area containing 'Bulk Alerts.'
- Expires:** A date field set to '09/08/2017'.
- Pop-Up:** A checked checkbox.
- Notification:** A checked checkbox.
- Type:** A radio button selection with three options: 'Informational' (unselected), 'Warning' (selected), and 'Critical' (unselected).

The 'Save' button at the bottom of the form is highlighted with a red box and an arrow labeled '11'. The 'NEW ALERT' button at the top left is highlighted with a red box and an arrow labeled '10'. The 'Account Name' list on the left is highlighted with a red box and an arrow labeled '9'.

## Bulk View Alerts

### Step 11:

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



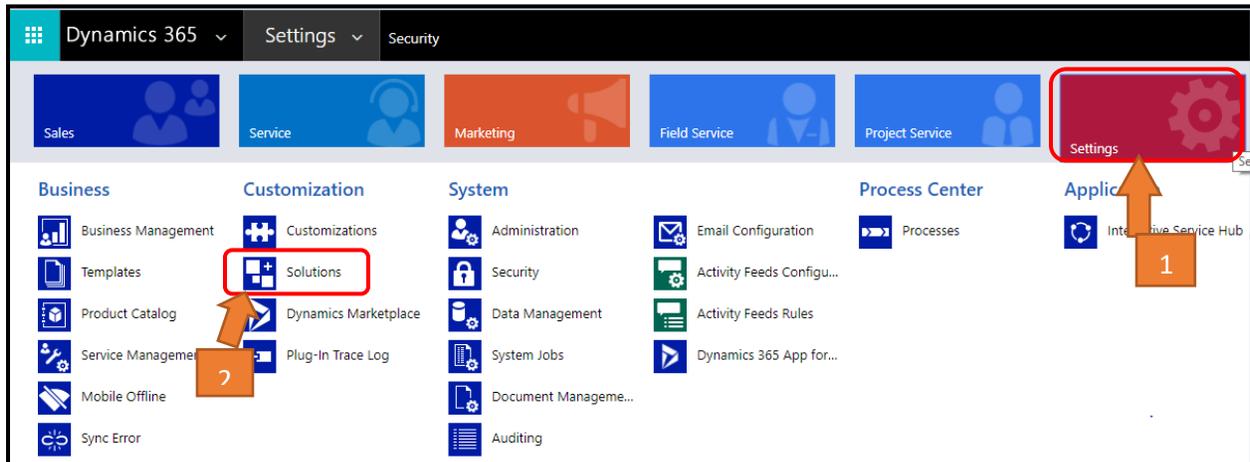
The screenshot shows the Microsoft Dynamics CRM interface. On the left, under 'My Active Accounts', several accounts are listed and selected: HCL Technologies Limited., Infosys Limited., SR Management Technology Consultancy, Tech Mahindra Limited., and Wipro Limited. The 'VIEW ALERT' button is highlighted with a red box and an orange arrow labeled '12'. The 'View Alerts' window is open, showing a table of alerts for the selected accounts. The table has columns for Description, Expires, Created On, and Created By. Three rows of alerts are displayed, all with the description 'Bulk Alerts.', an expiration date of 9/8/2017, a creation date of 9/6/2017, and created by 'Harish kumar'. The table is also highlighted with a red box.

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

## How to Uninstall Alerts Solution?

### Step1:

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



### Step2:

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

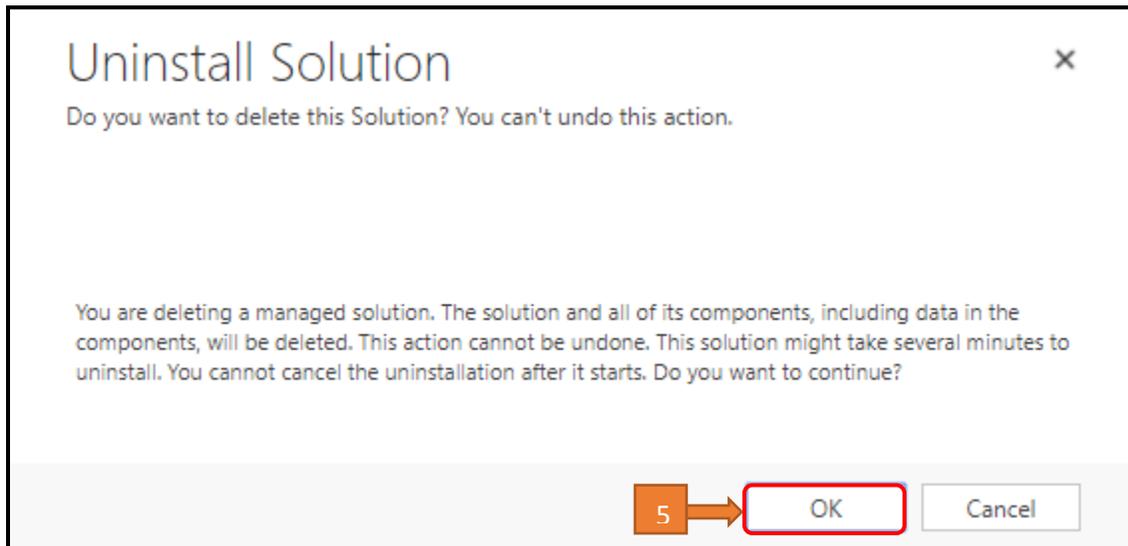
All Solutions ▾

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

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

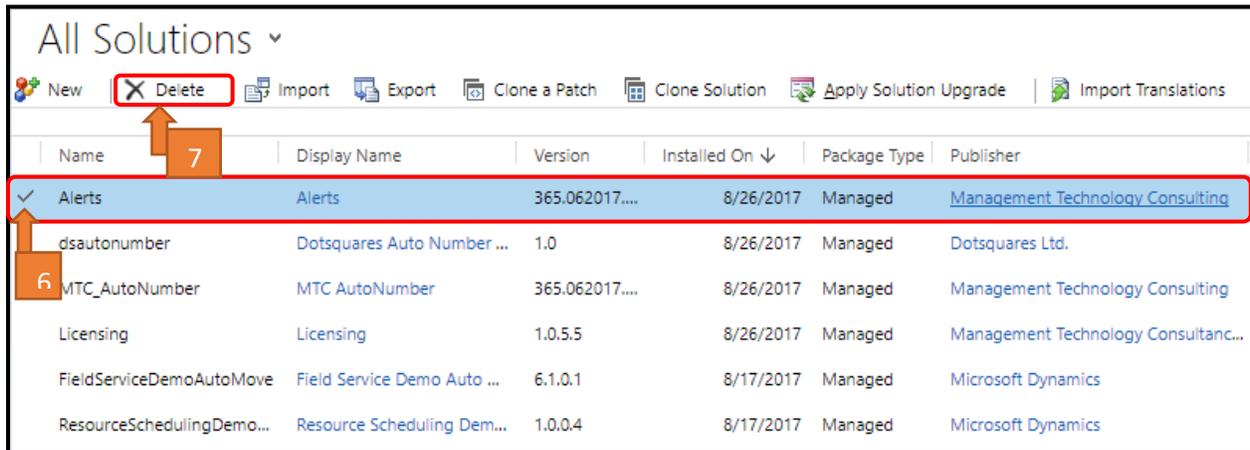
### Step3:

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



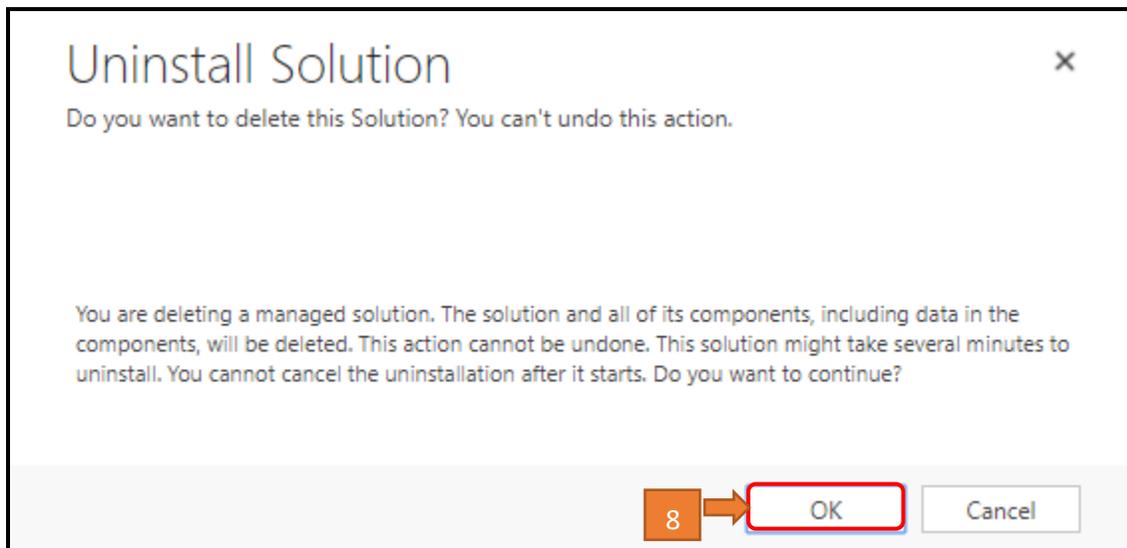
#### Step4:

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



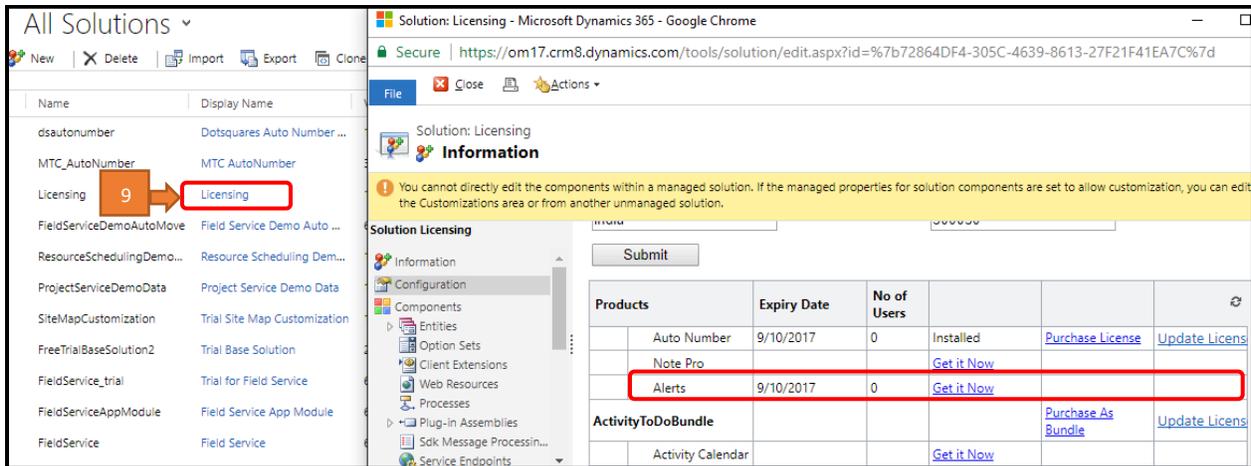
#### Step5:

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



**Step6:**

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



The screenshot shows the 'Solution Licensing' page in Microsoft Dynamics 365. On the left, a list of solutions is shown, with 'Licensing' selected and highlighted by a red box and an orange arrow labeled '9'. The main area displays the 'Solution Licensing' configuration for the 'Alerts' solution. A table lists the products and their licensing status:

Products	Expiry Date	No of Users	Status	Actions
Auto Number	9/10/2017	0	Installed	<a href="#">Purchase License</a> <a href="#">Update License</a>
Note Pro			Get it Now	
Alerts	9/10/2017	0	Get it Now	
ActivityToDoBundle				<a href="#">Purchase As Bundle</a> <a href="#">Update License</a>
Activity Calendar			Get it Now	

The 'Alerts' row is highlighted with a red box, showing its status has changed from 'Installed' to 'Get it Now'.