User Guide

Alerts

Document Version: 1.0

Solution Version: 2016365_062017_0_0

MTC

THE CRM SERVICES VALUE SOURCE

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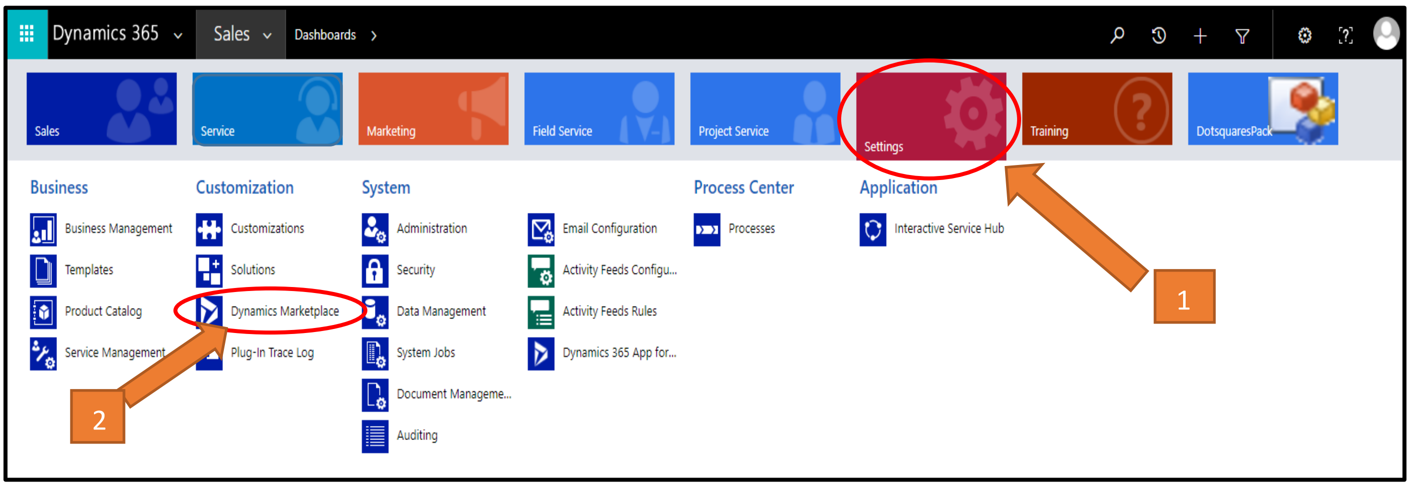
How to Install Alerts in your Dynamics 365 CRM?

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

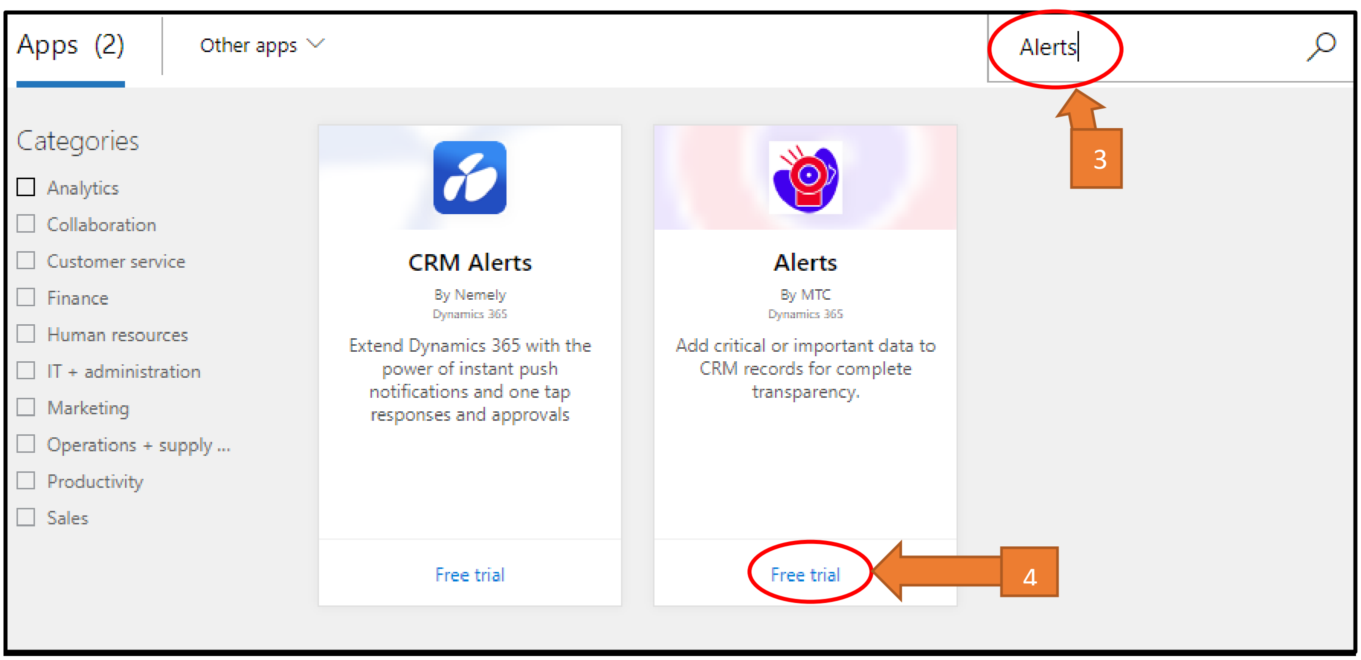
Step 1:

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



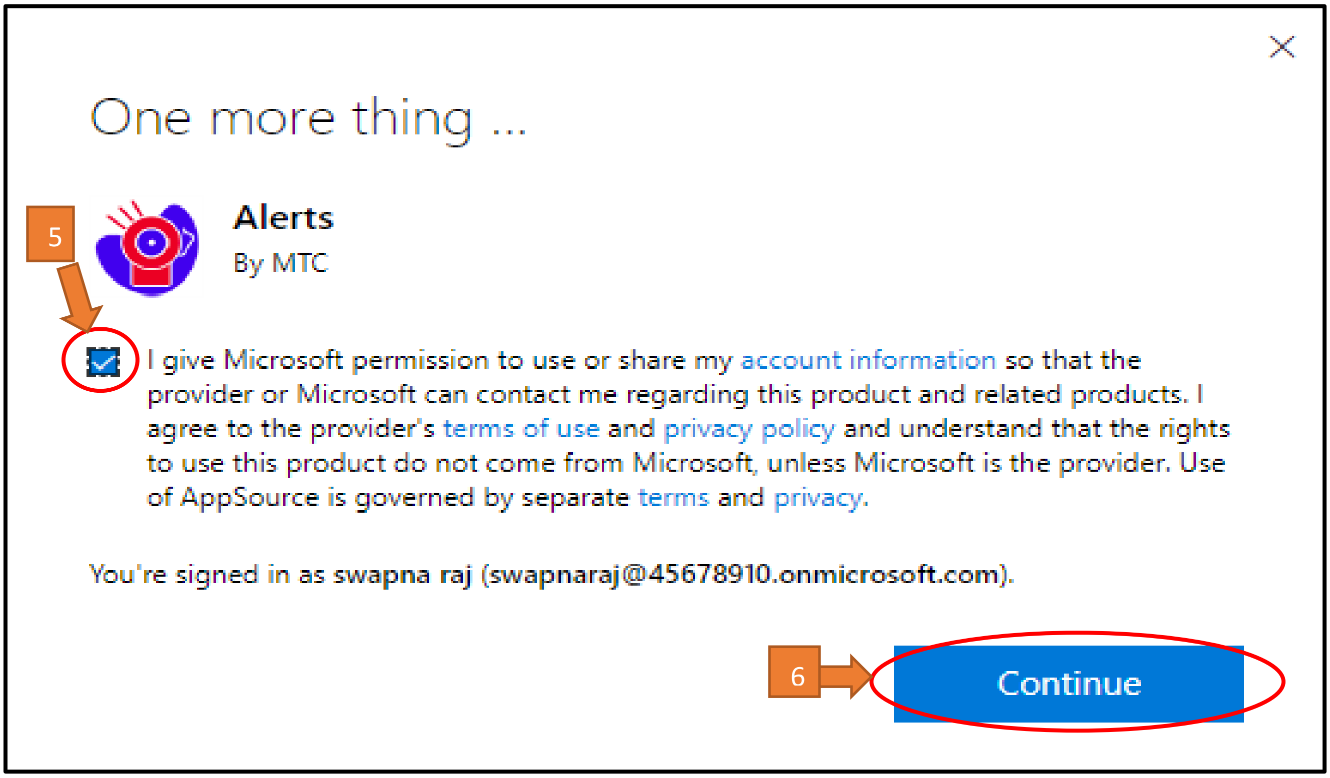
Step 2:

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



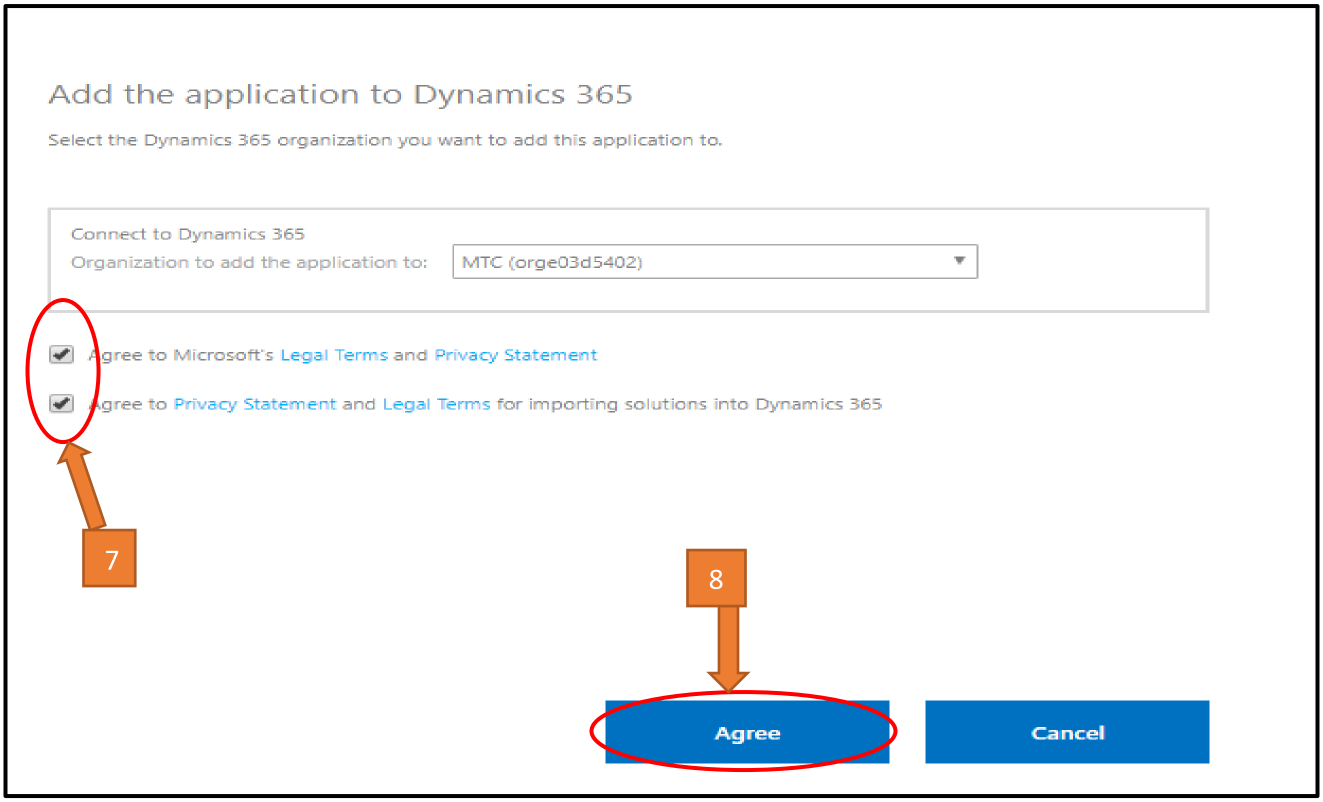
Step 3:

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



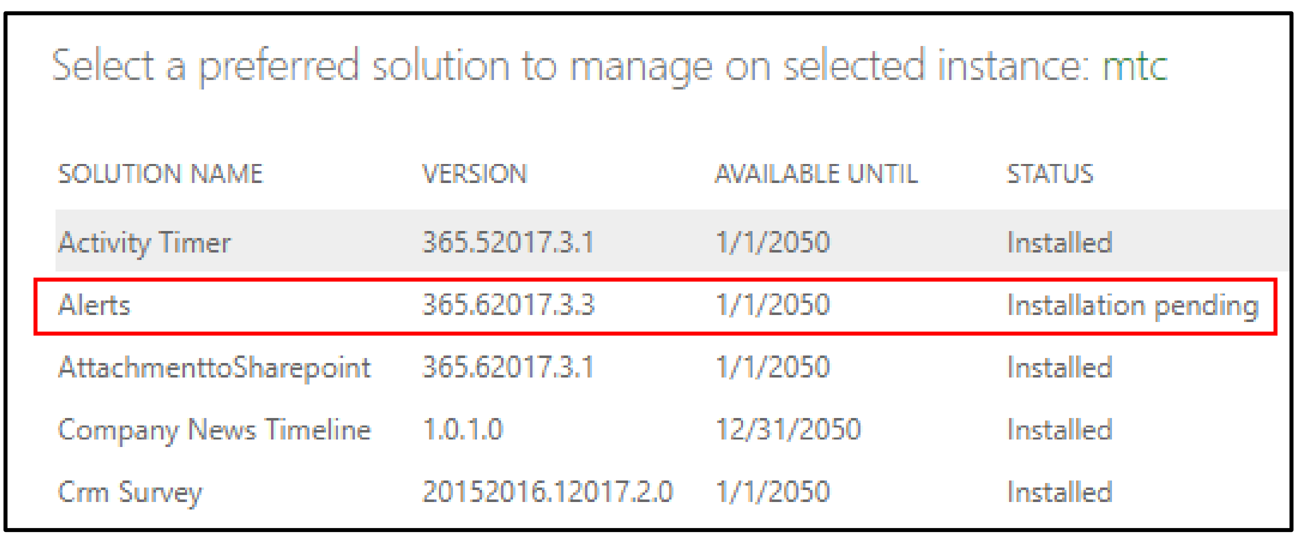
Step 4:

- 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.



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*: Harish
Last Name*: Kumar
Phone*: 1234567892
Company*: MTC
Website*: www.mtccrm.com
Email*: marothiamohit.1998@gmail.
City*: hyderabad
State/Province*: telengana
Country*: india
Zip/Postal Code*: 500050

Submit

Step 8:

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

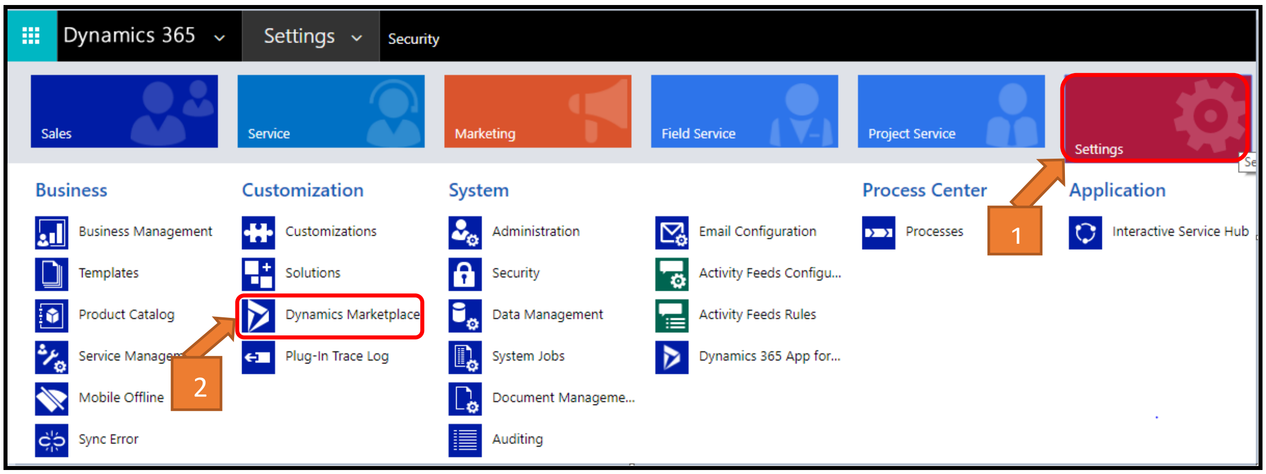
CRMStarterPack					Purchase As Bundle	Update License
	Activity Calendar			Get it Now		
	Alerts			Installed	Purchase License	Update License
	CRM Picture			Get it Now		
	Report To PDF			Get it Now		
	Auto Number			Installed	Purchase License	Update License
	Note Pro			Get it Now		

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.

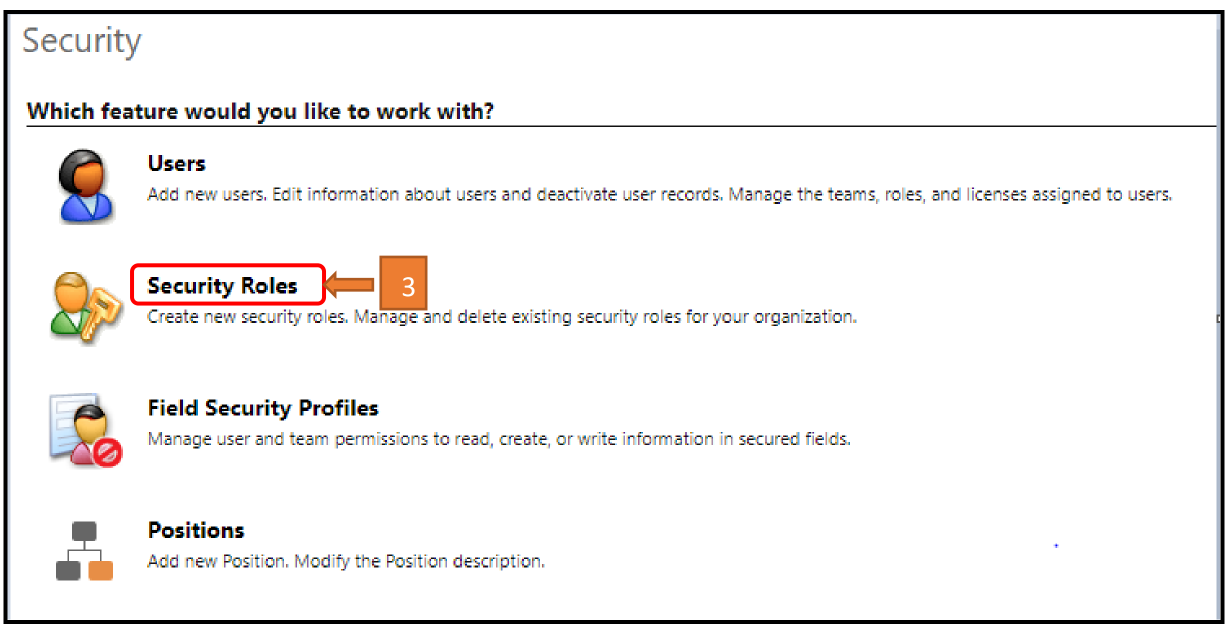
Step1:

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



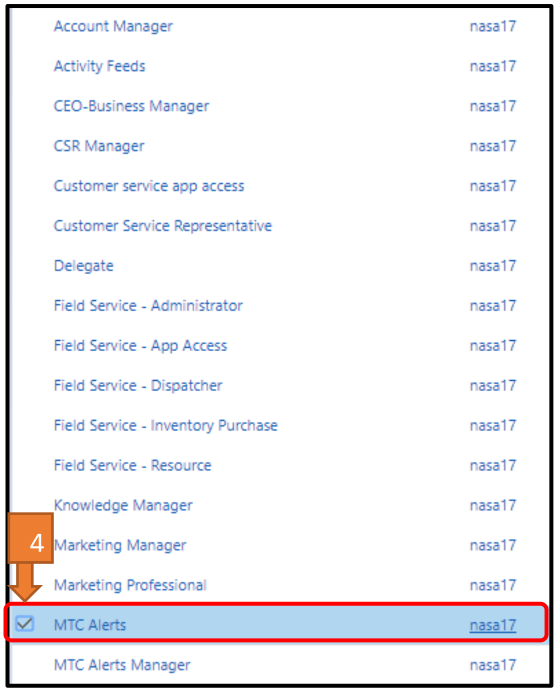
Step2:

- Click on **Security Roles**.



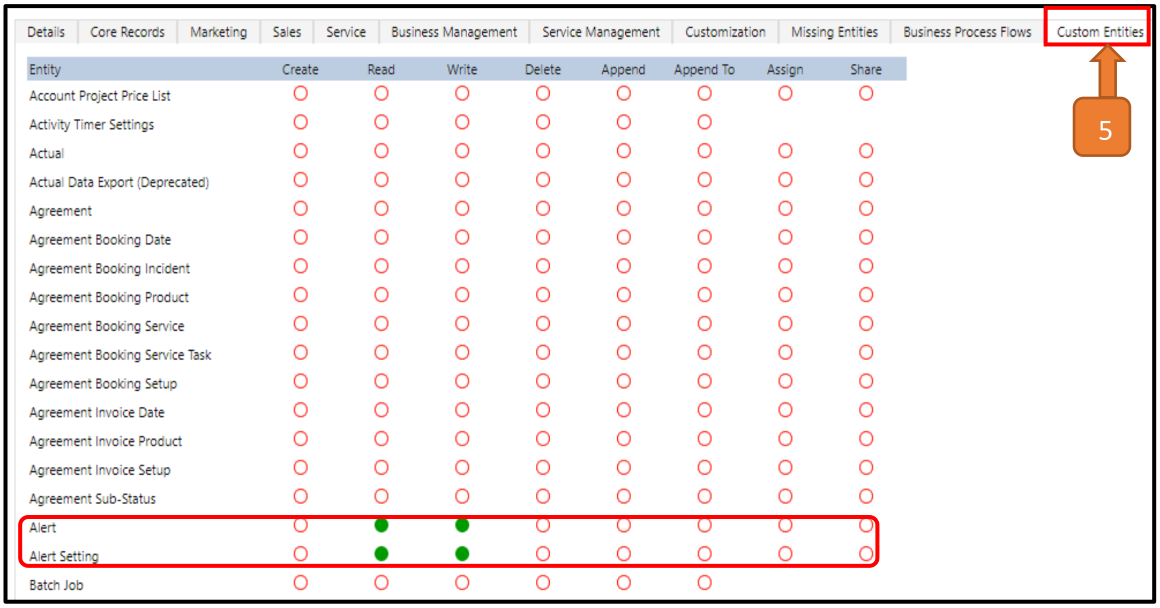
Step3:

- Tick on MTC Alerts checkbox.



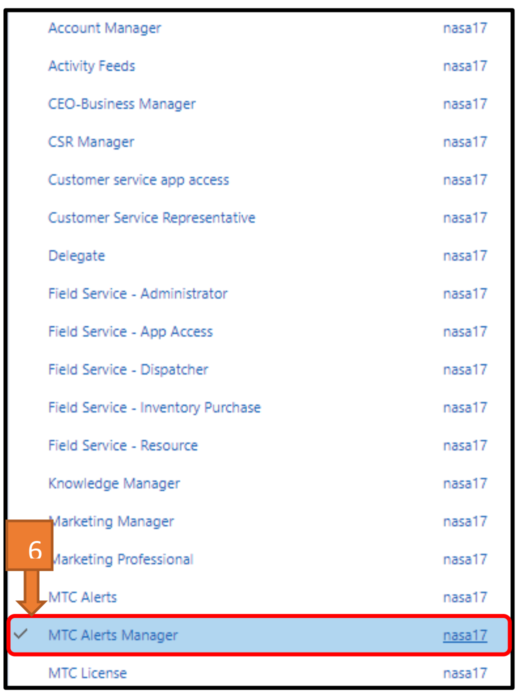
Step4:

- 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



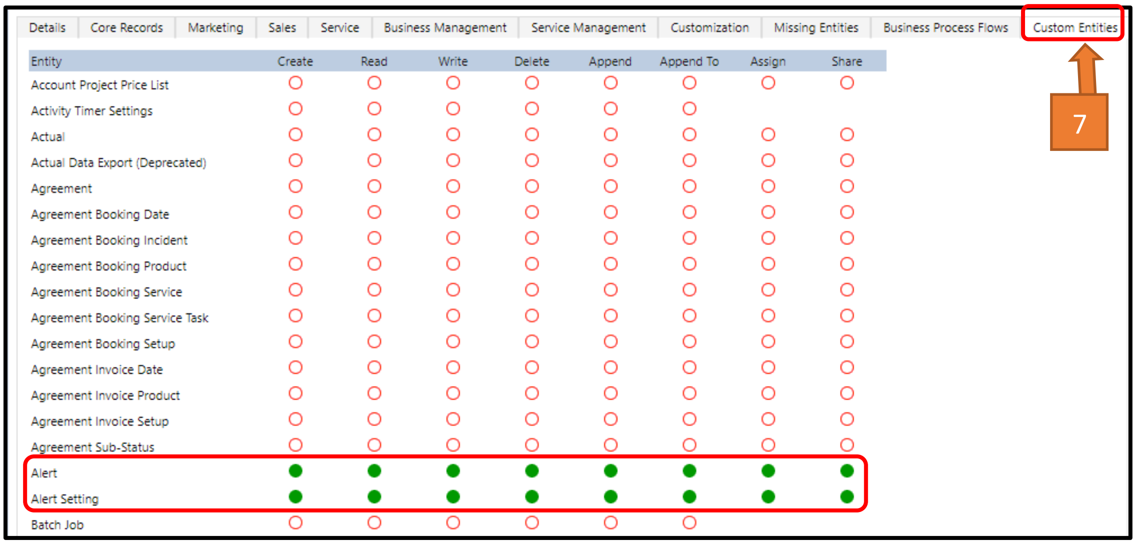
Step5:

➢ Tick the **MTC Alerts Manager checkbox.**



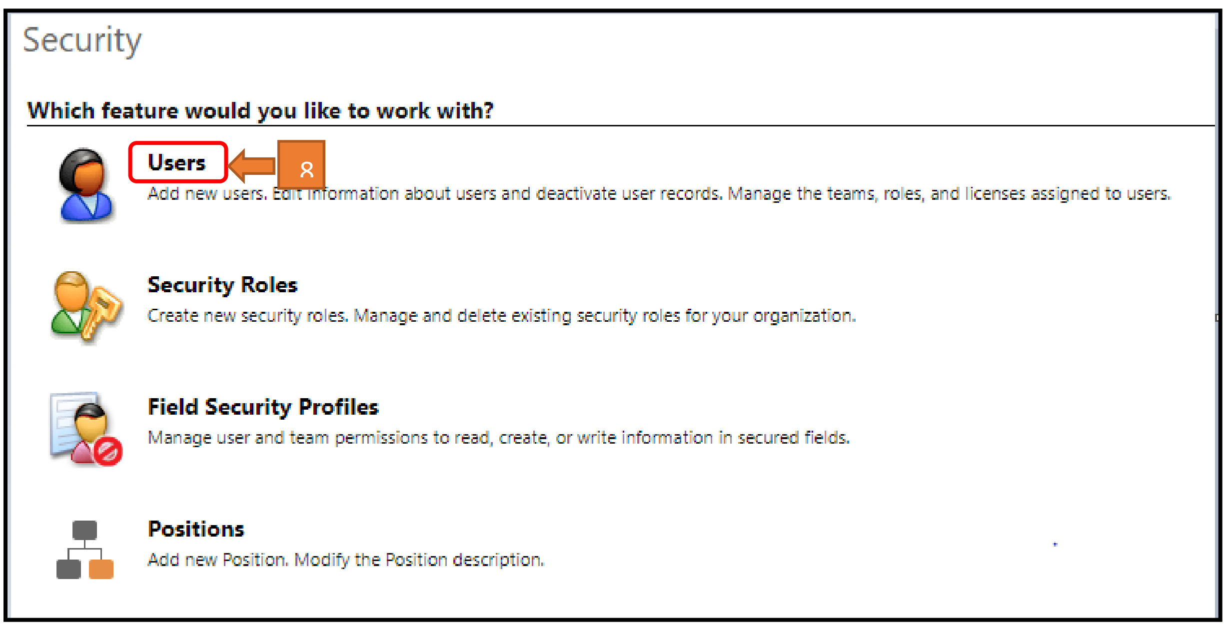
Step6:

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



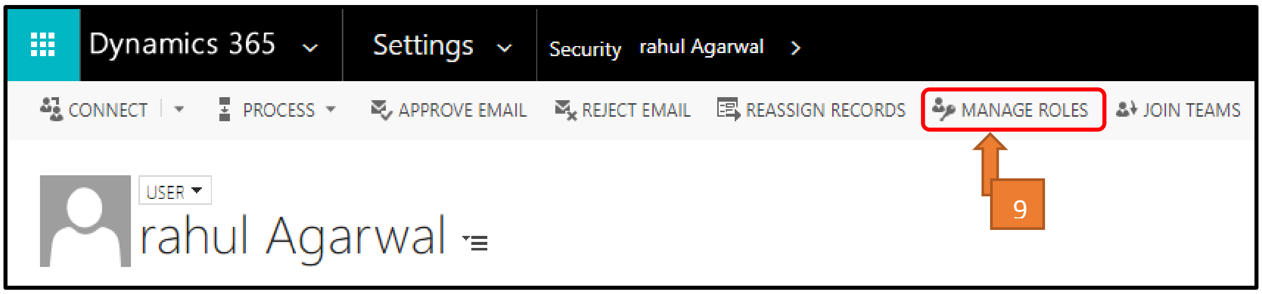
Step7:

➤ Click on Users.

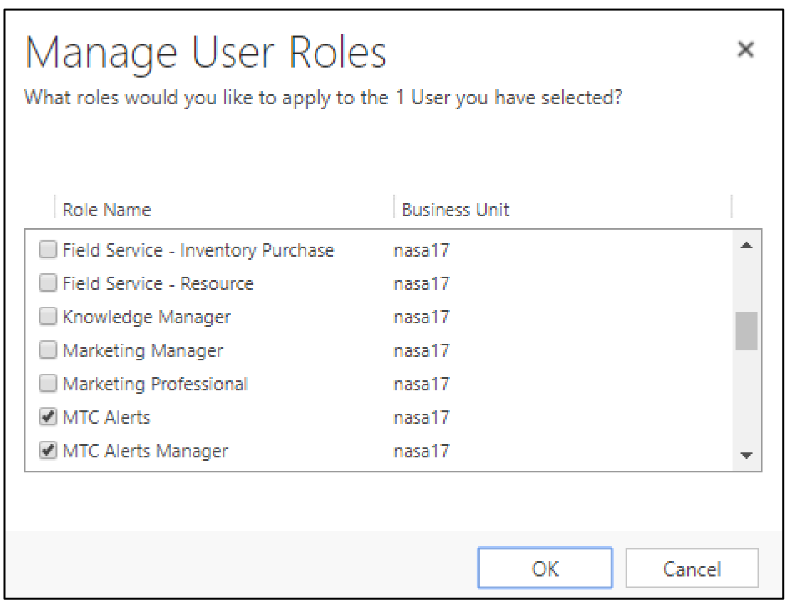


Step8:

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



Step9:



Notes:

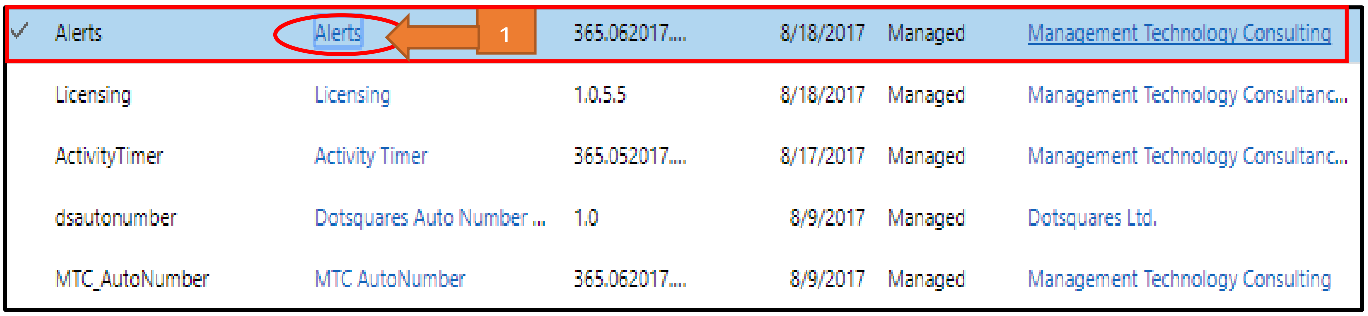
MTC Alerts - This User Roles has all the facilities as a regular user to use the functionality. But will not be able to create, or delete records.

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?

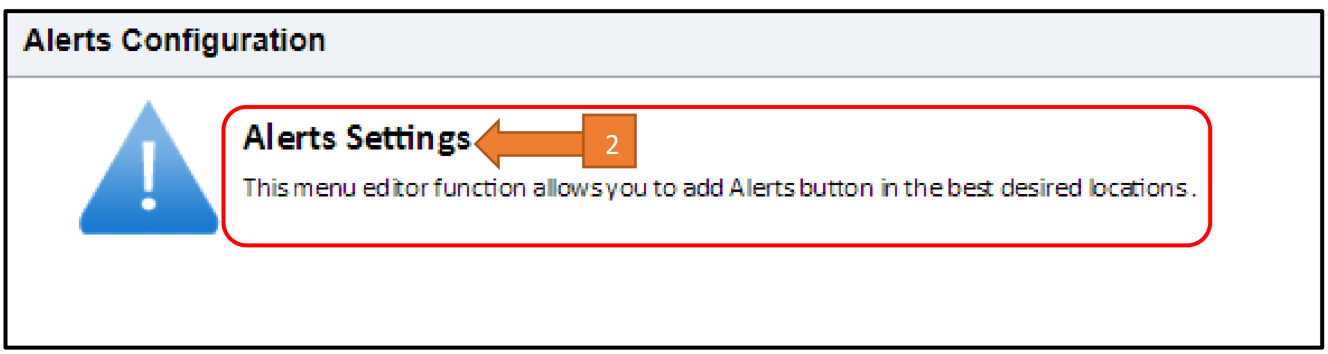
Step 1:

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



Step 2:

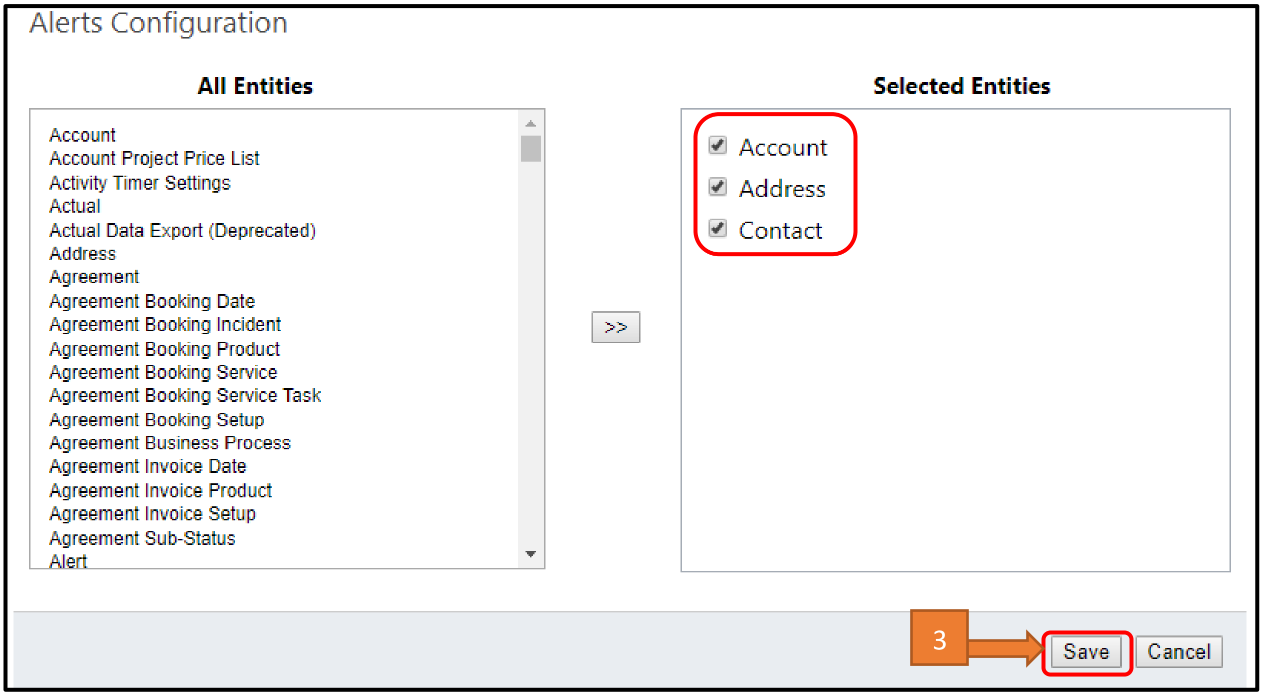
- Click on **Alerts Settings.**



Step 3:

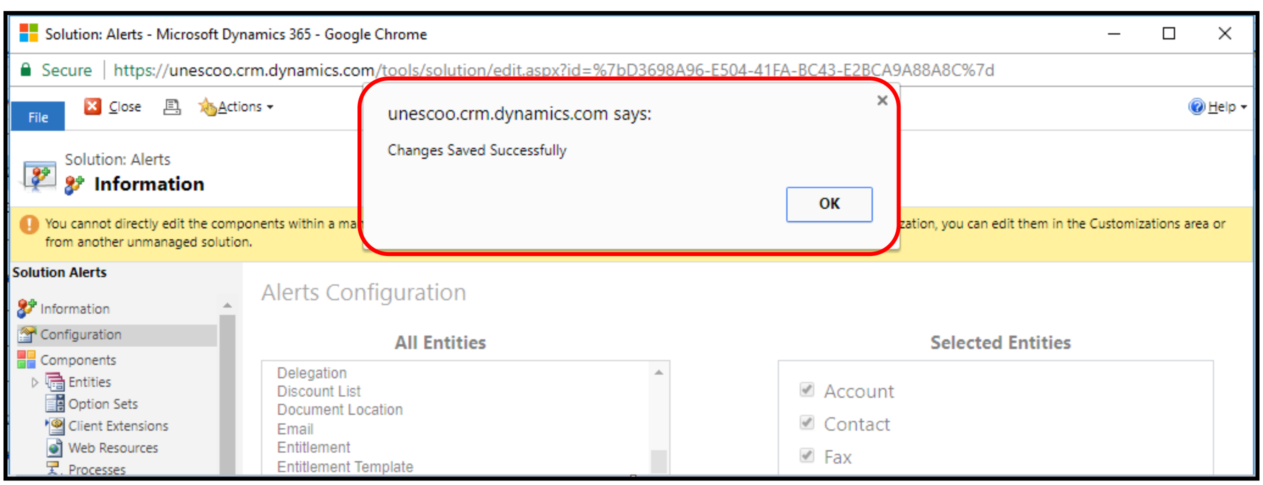
- Select one or more Entities from All Entities and click on double arrow **>>** button to move these entities to **Selected Entities** or you can double click on entities to move to the Selected Entities.

- After ticking all the entities checkboxes click on **save** button



Step4:

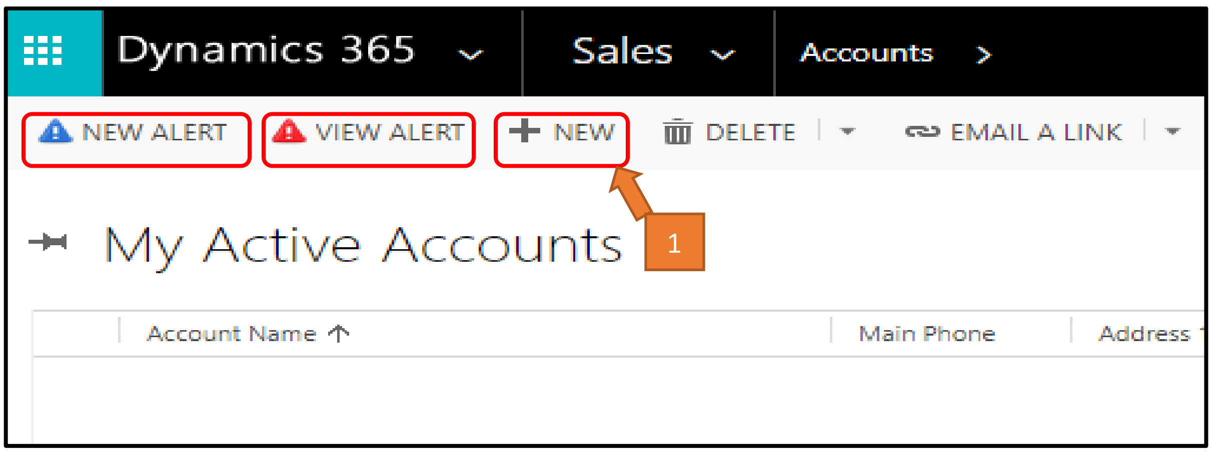
➢ After clicking on save button, **Changes Saved Successfully** popup message will come.



Alerts Functionality

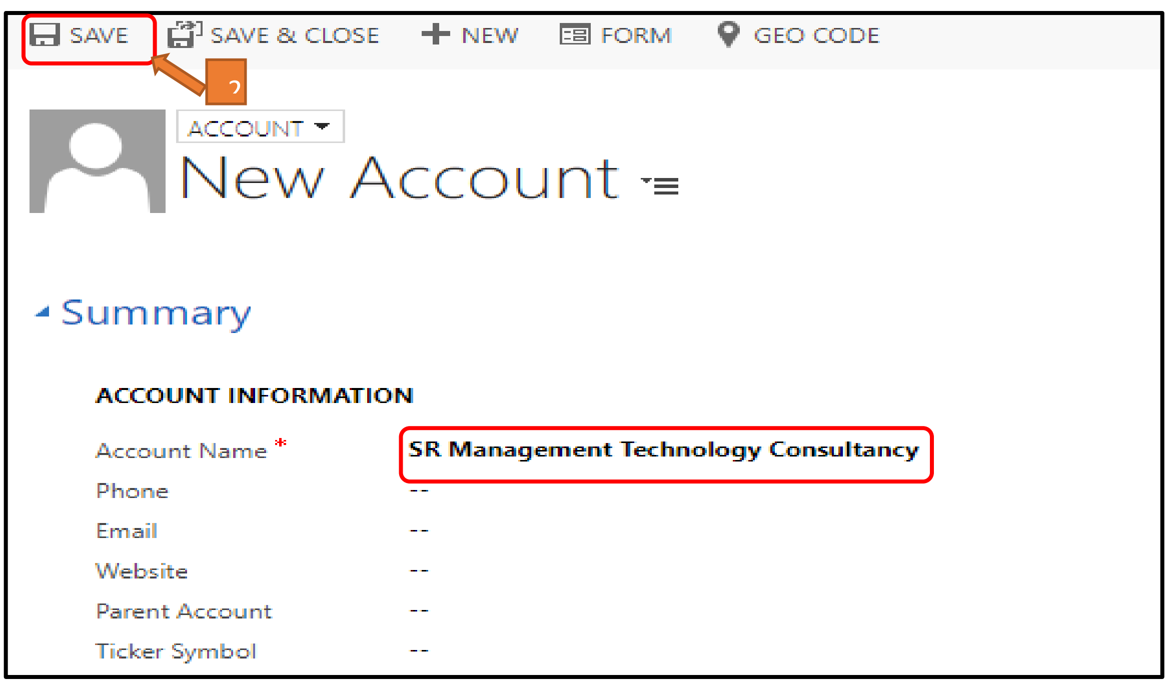
Step 1:

- 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



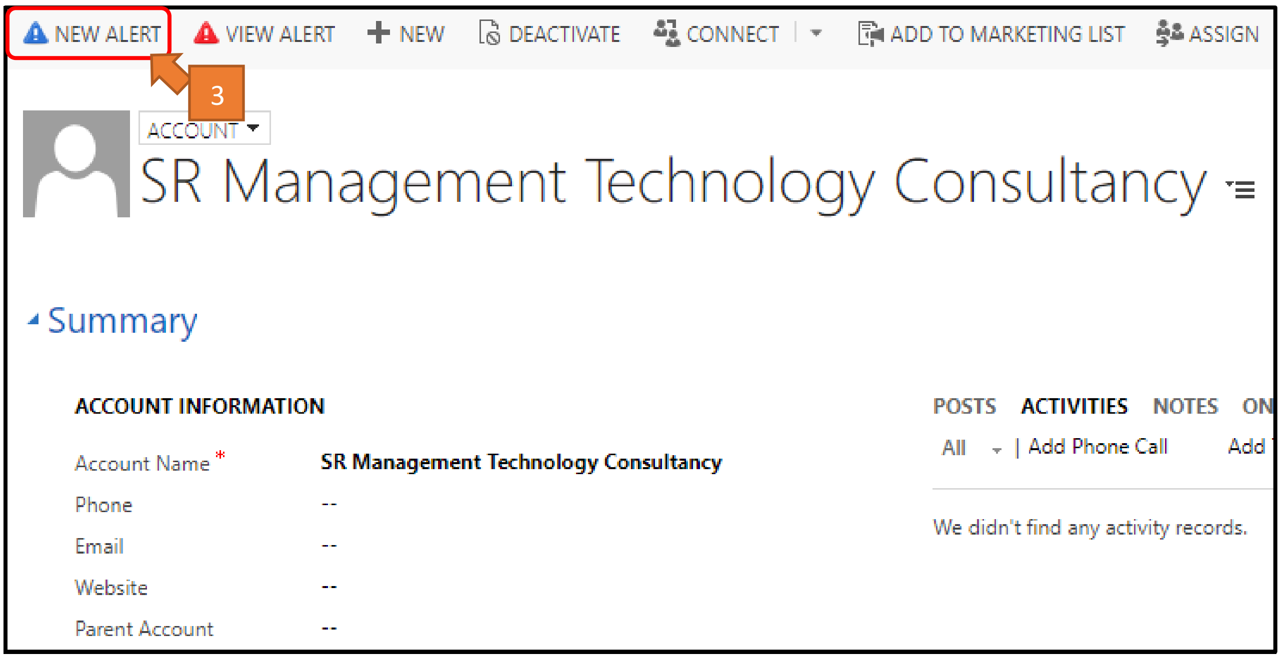
Step 2:

- Fill the Account details and Save it.

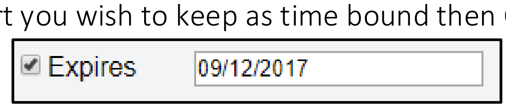


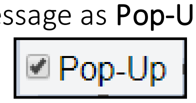
Step 3:

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



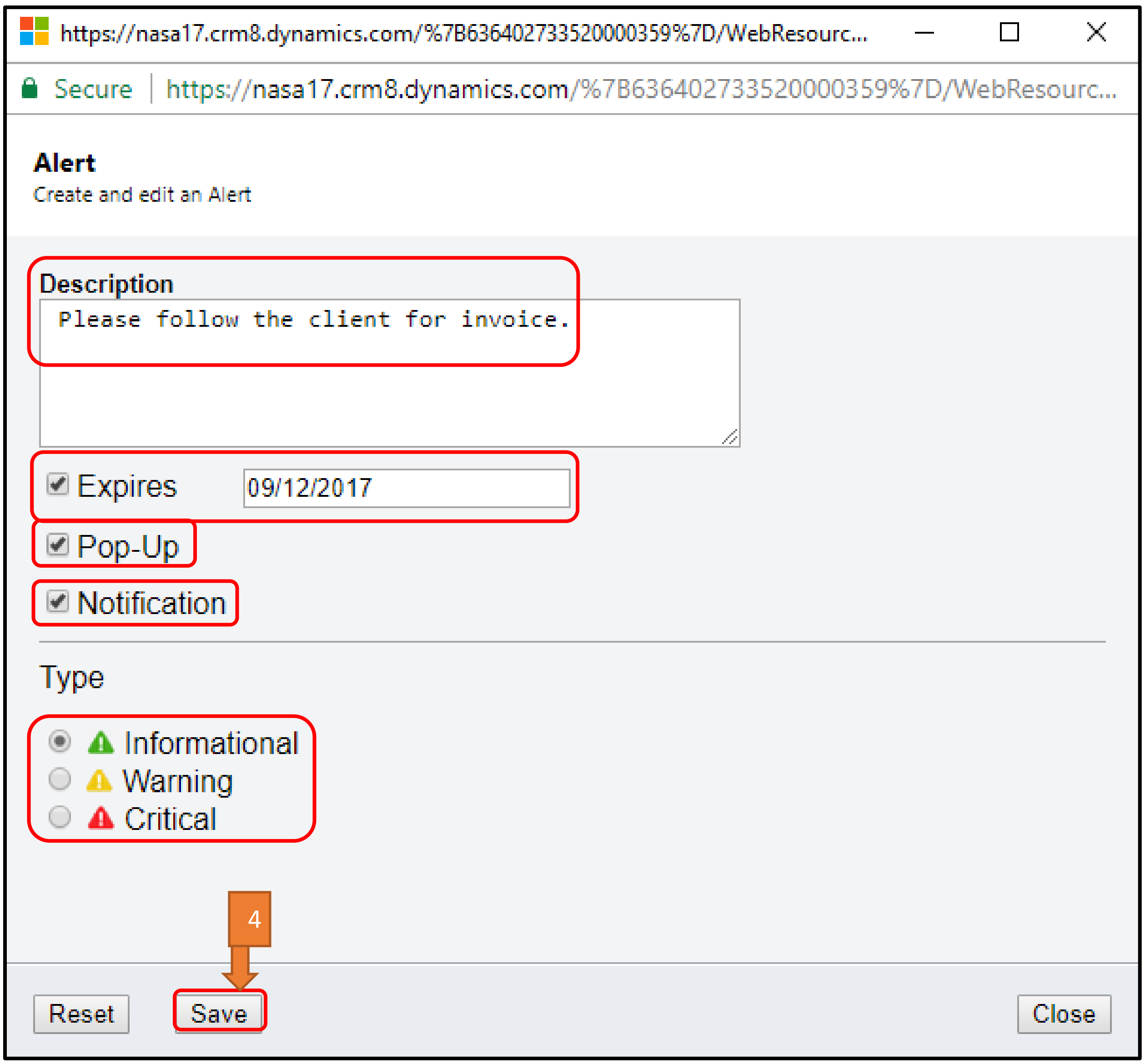
Step 4:

- 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. 

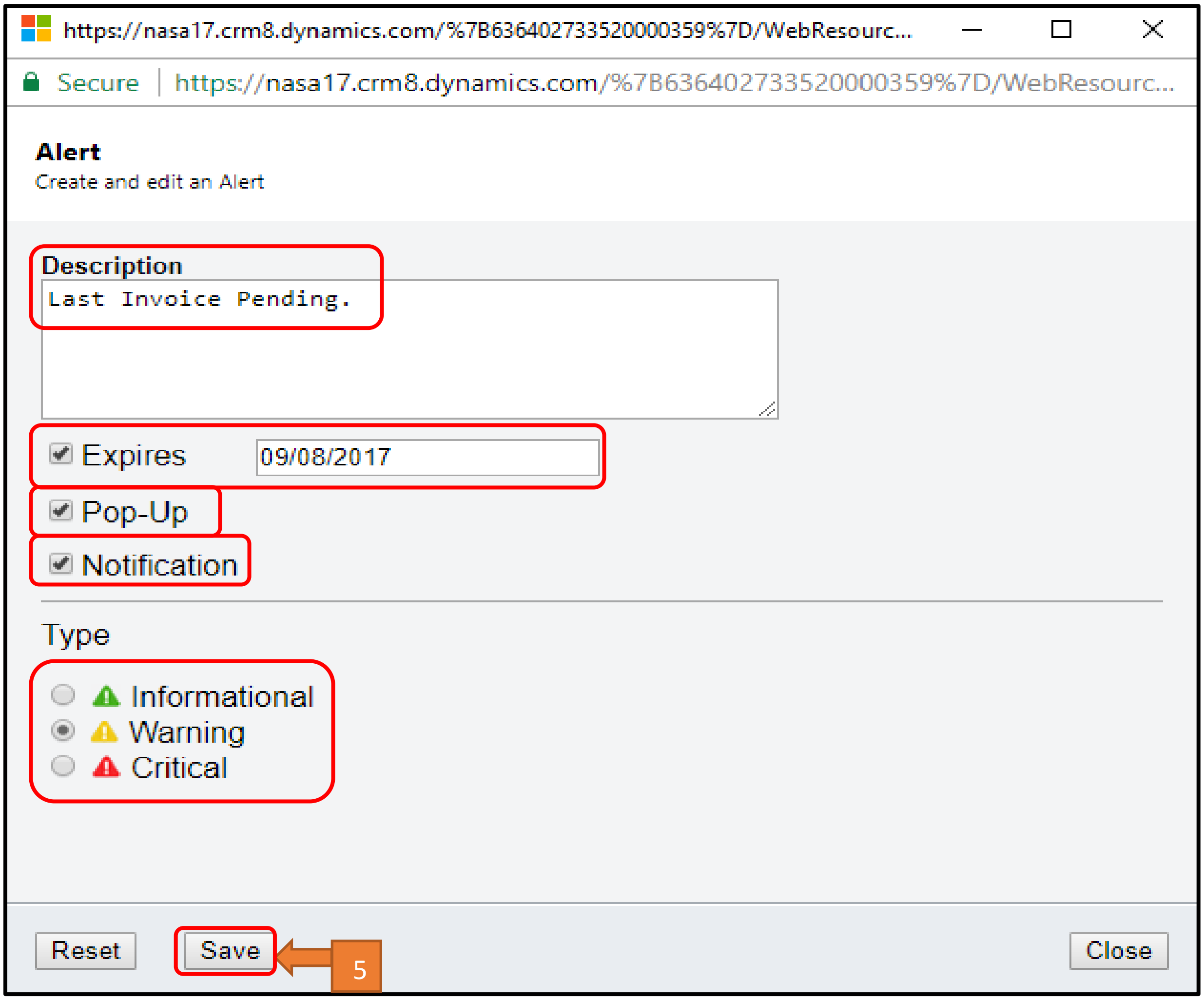
- If you wish to have this alert message as **Pop-Up** (means whenever you access the record a pop up message is displayed). 

- If you wish to have notifications message in CRM as a notification, then select **Notification.** 

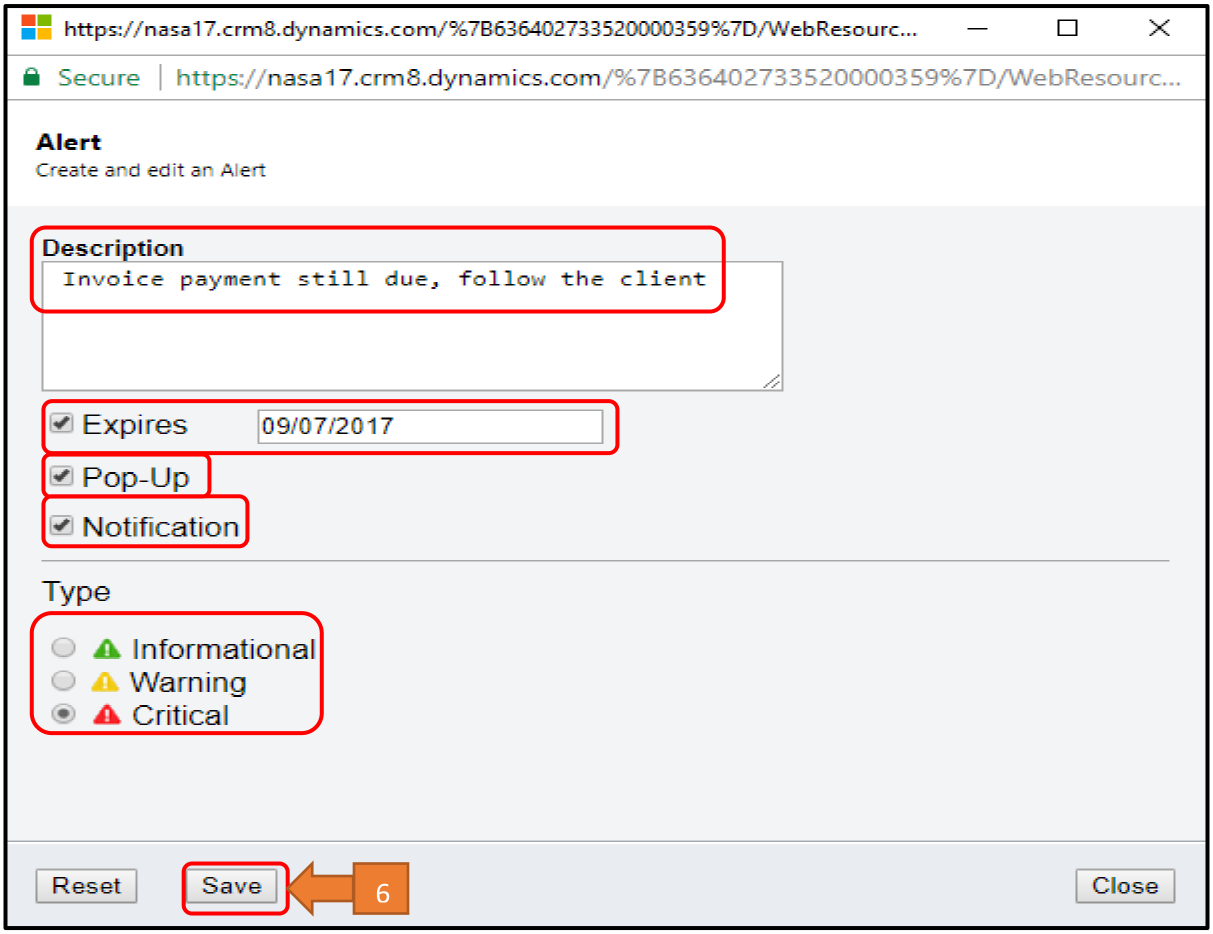
- Select the **Type** (Category) of alert – **Informational as example.**
- Click on **save** button to save the Alert.



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

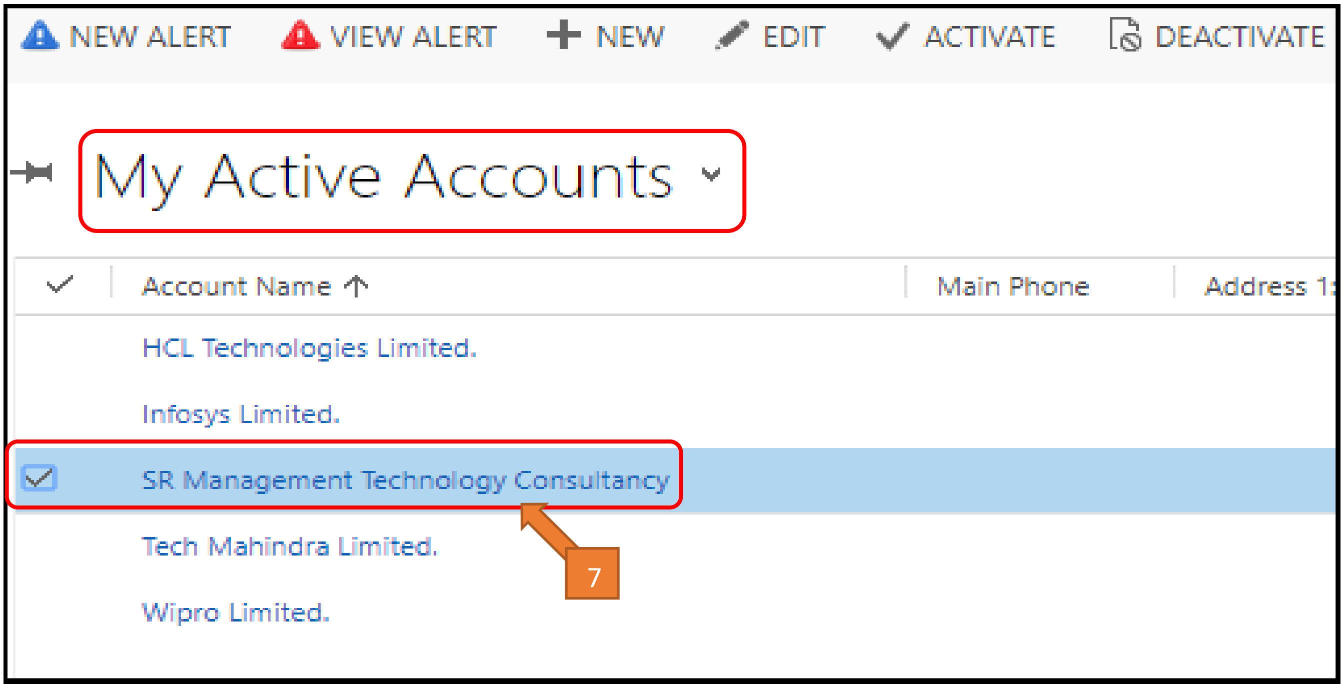


➢ Select the **Type** (Category) of alert –**Critical** as example.



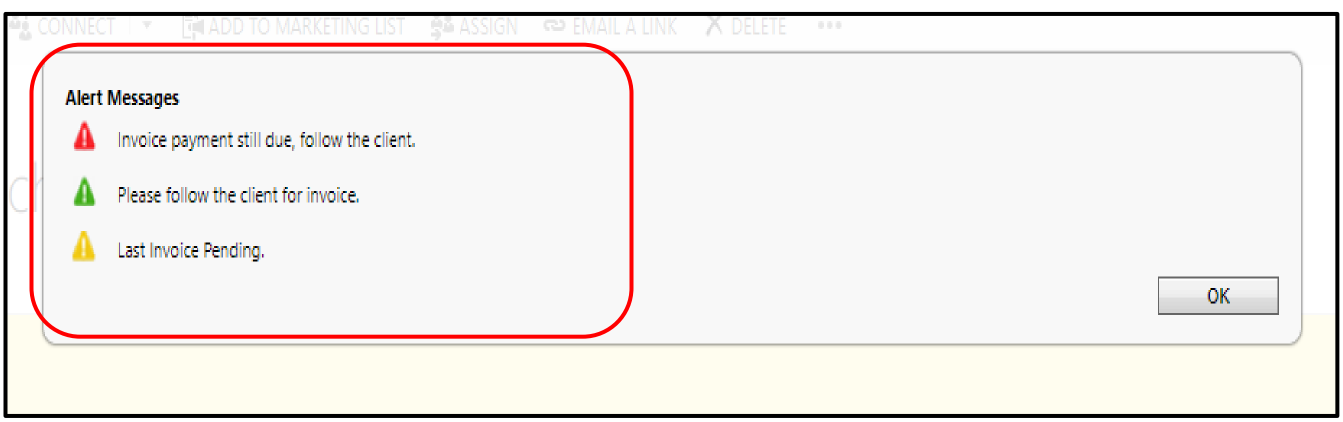
Step 5:

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



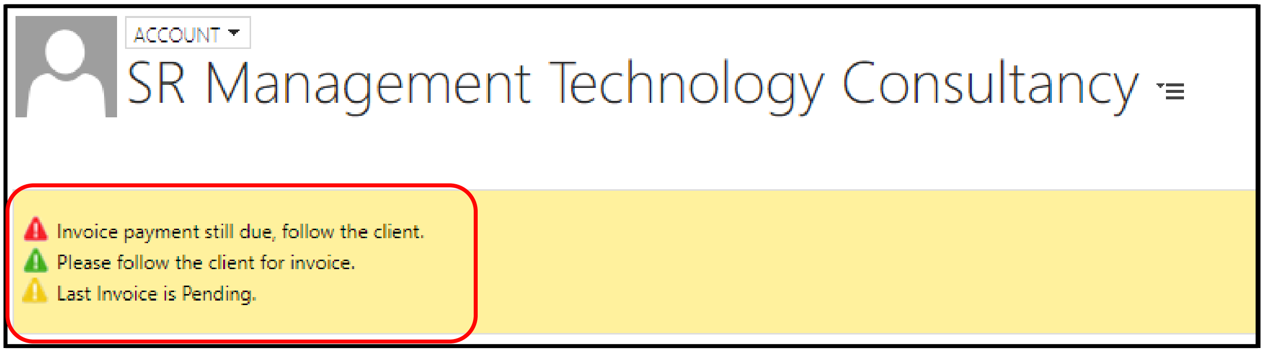
Step 6:

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



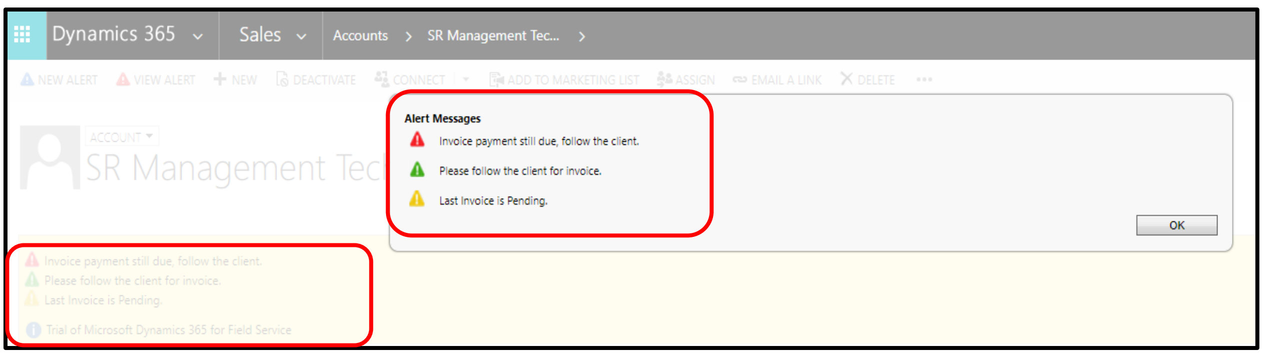
Step 7:

➢ 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 appropriative button
- Click **Ok** button.

<u>Filter Alerts By:</u>

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

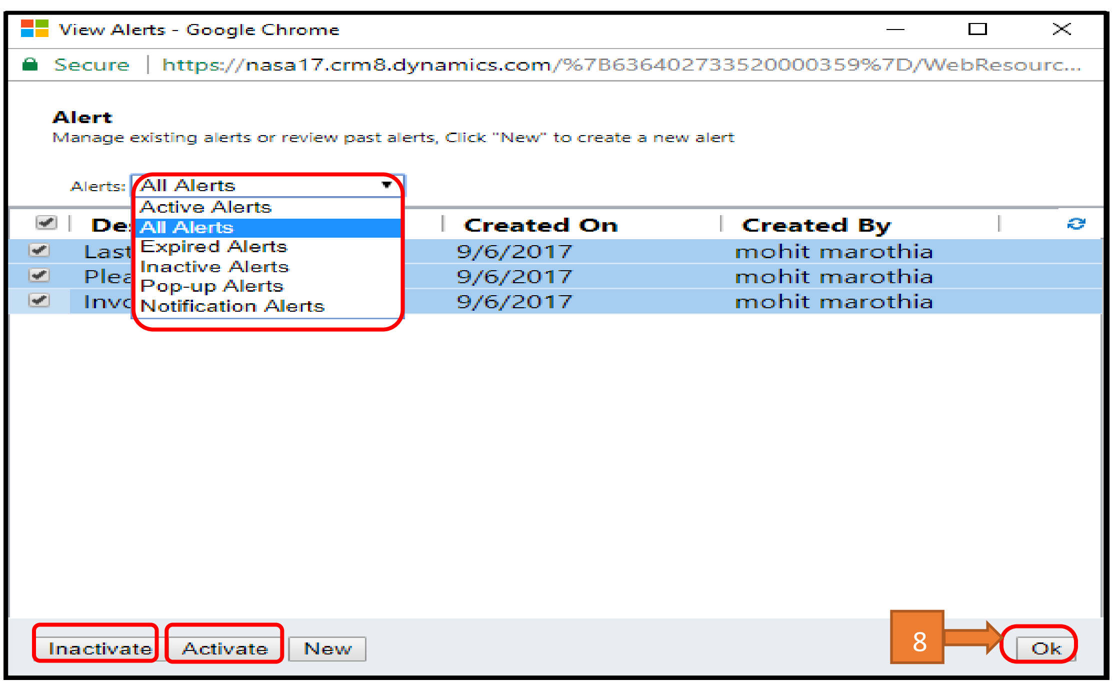
All Alerts: Allow the user to see all alerts.

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.

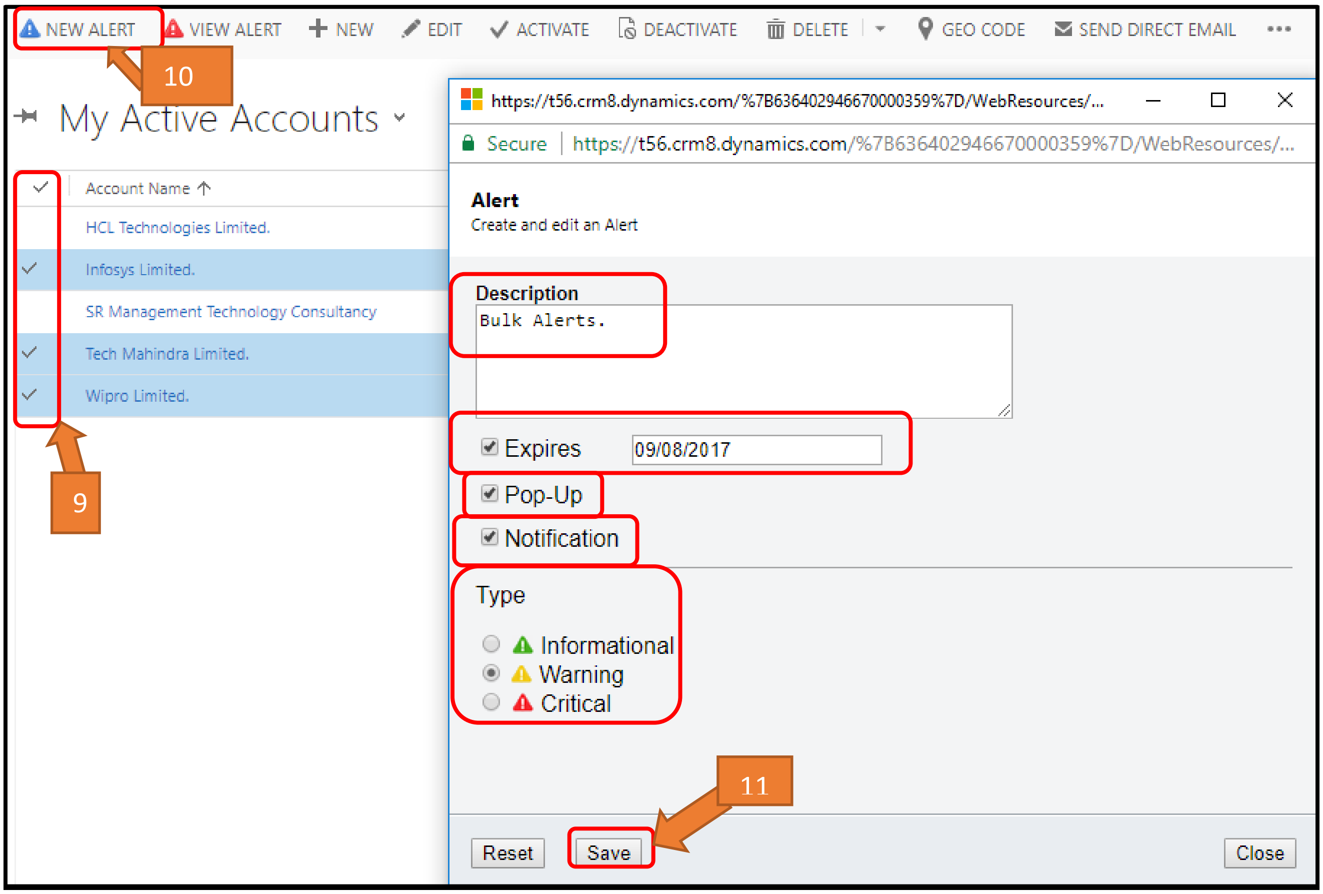
Notification Alerts: Allow the user to see all notification alerts.



Bulk New Alerts

Step 10:

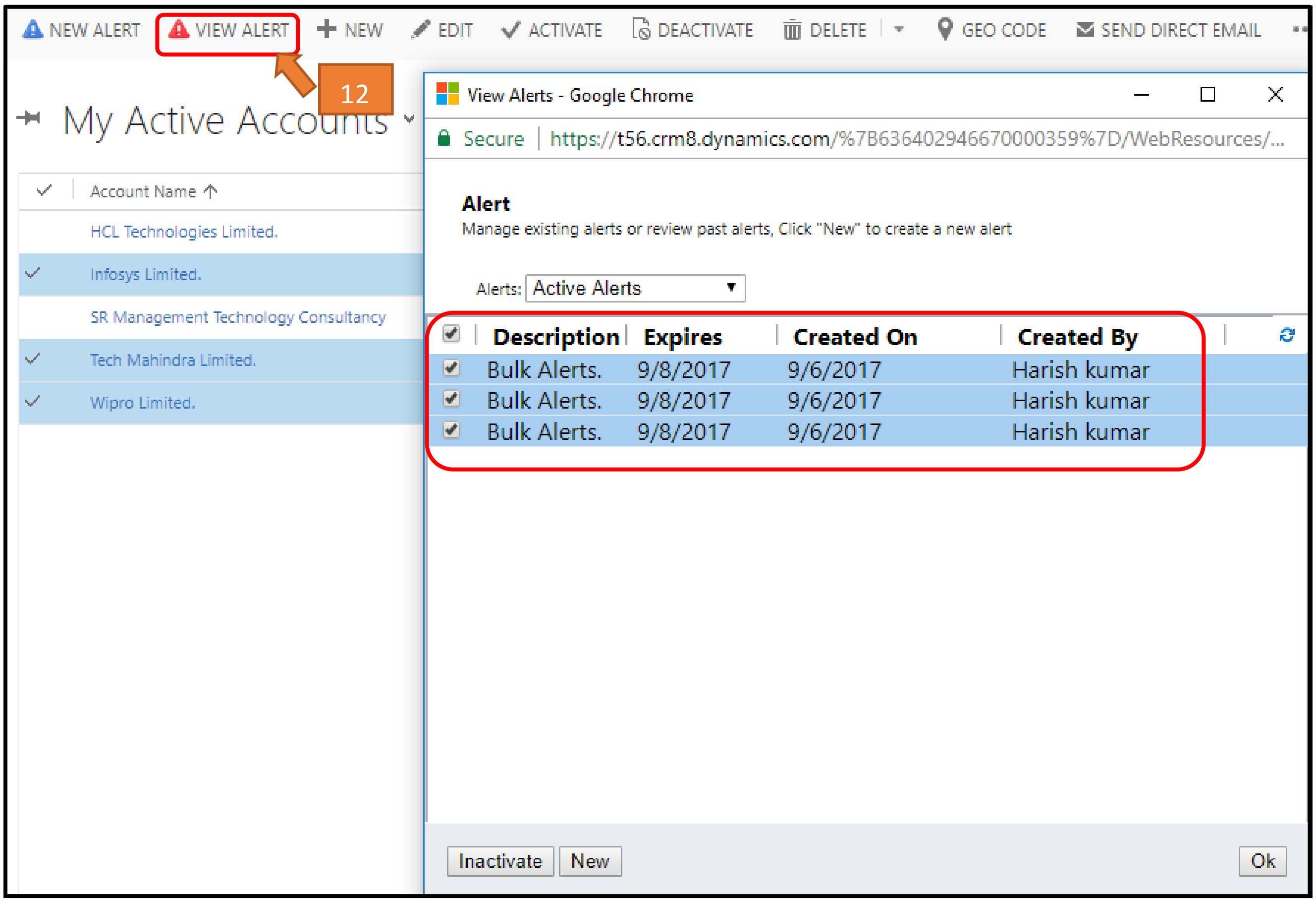
- Go to **Dynamic365** and click on **Sales** and select **Accounts**
- Select **multiple Accounts** as you wish to create bulk alerts.
- After entering all details, click on **save** button to save the Alert.



Bulk View Alerts

Step 11:

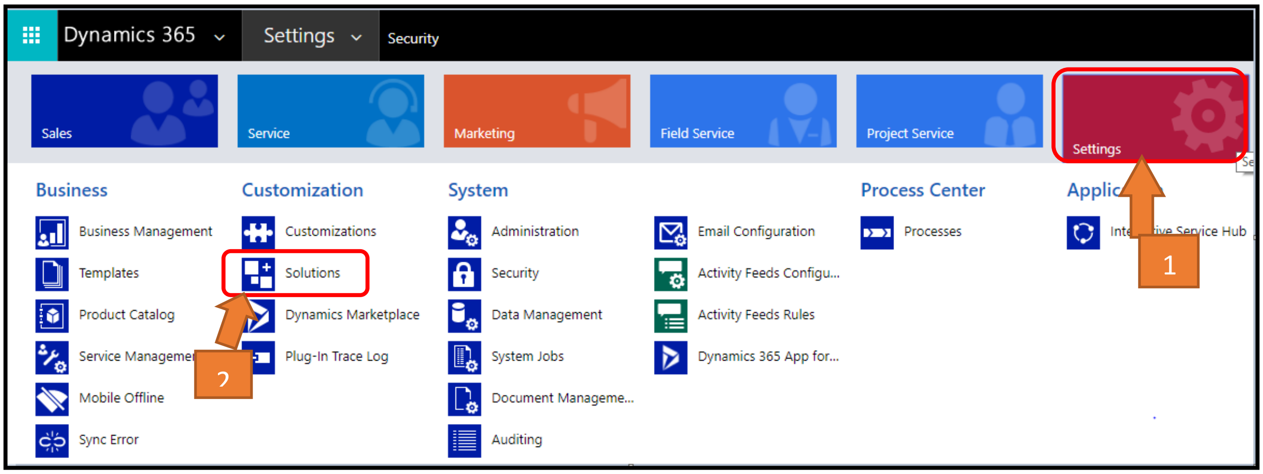
- Click on **View Alert.**
- All Alerts pertaining to **Selected Account Records** are displayed.



How to Uninstall Alerts Solution?

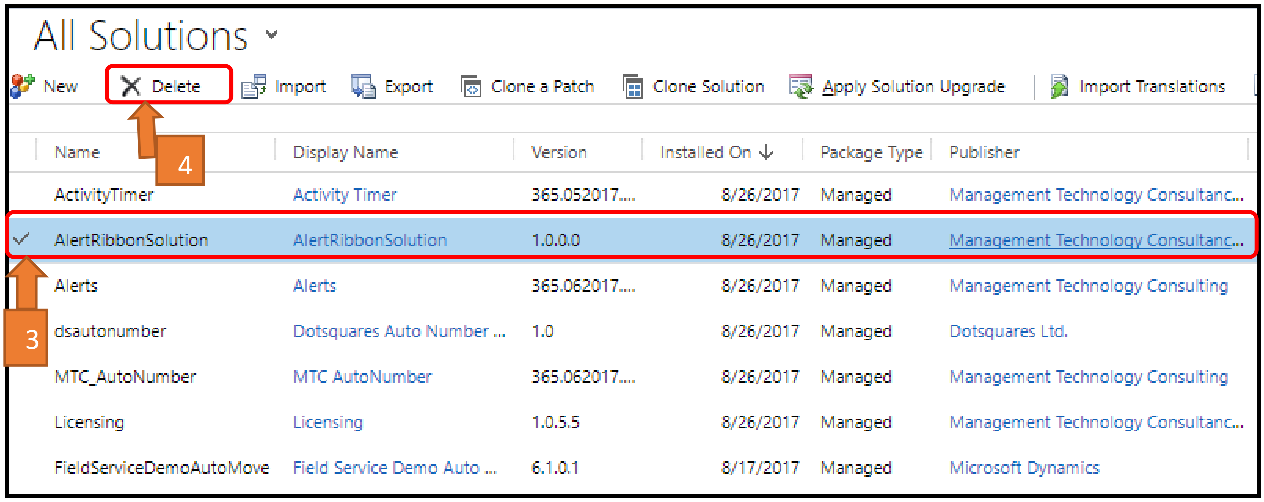
Step1:

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



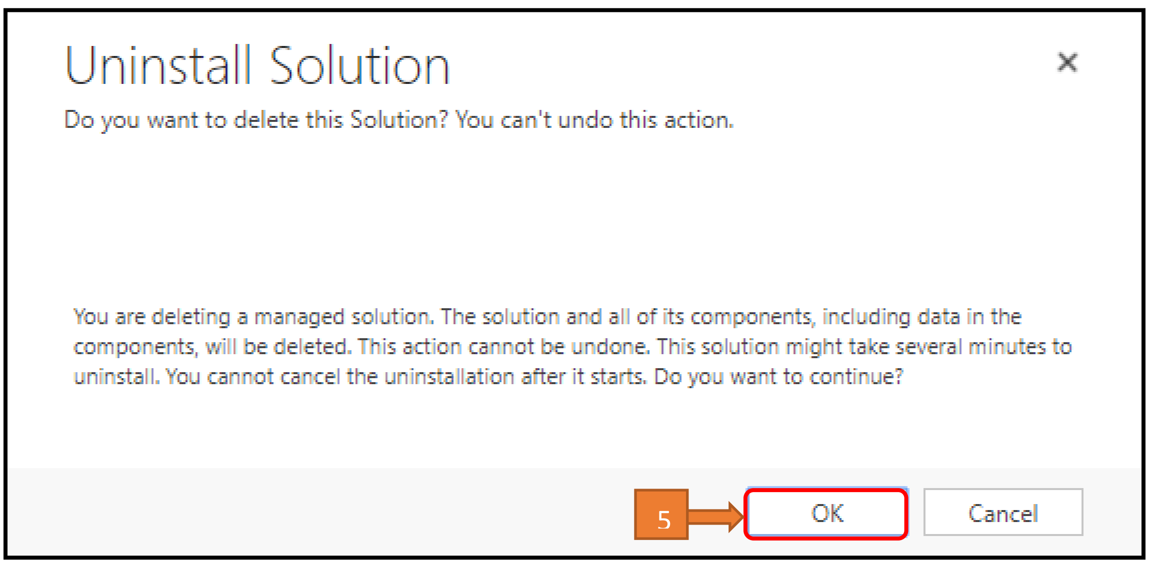
Step2:

- 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**.



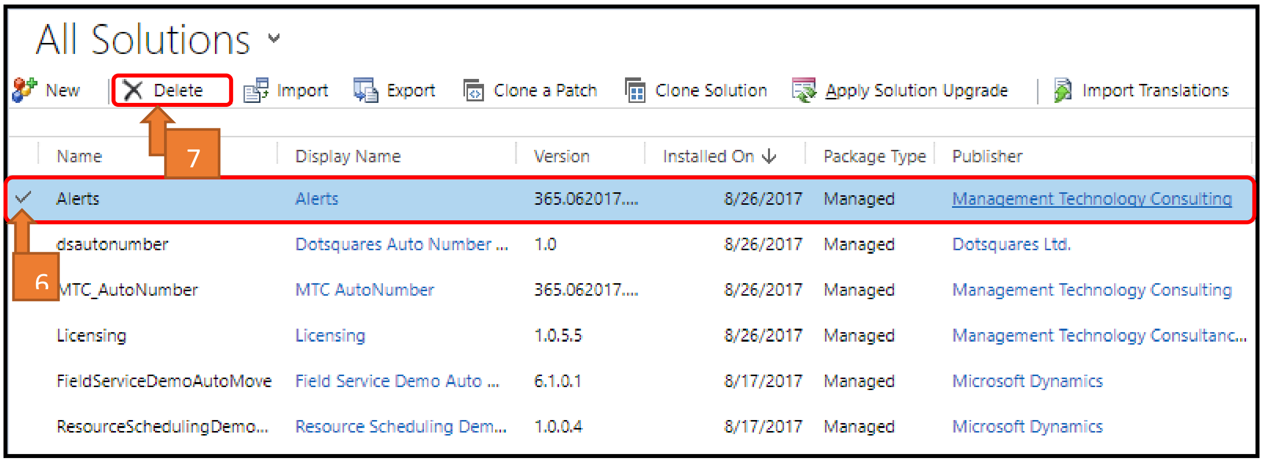
Step3:

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



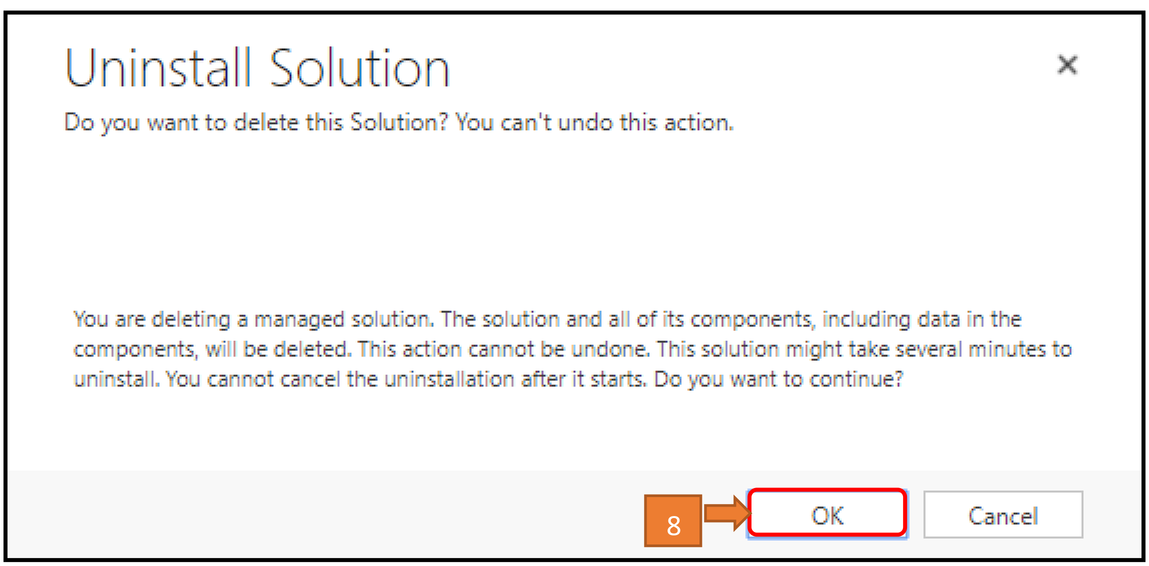
Step4:

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



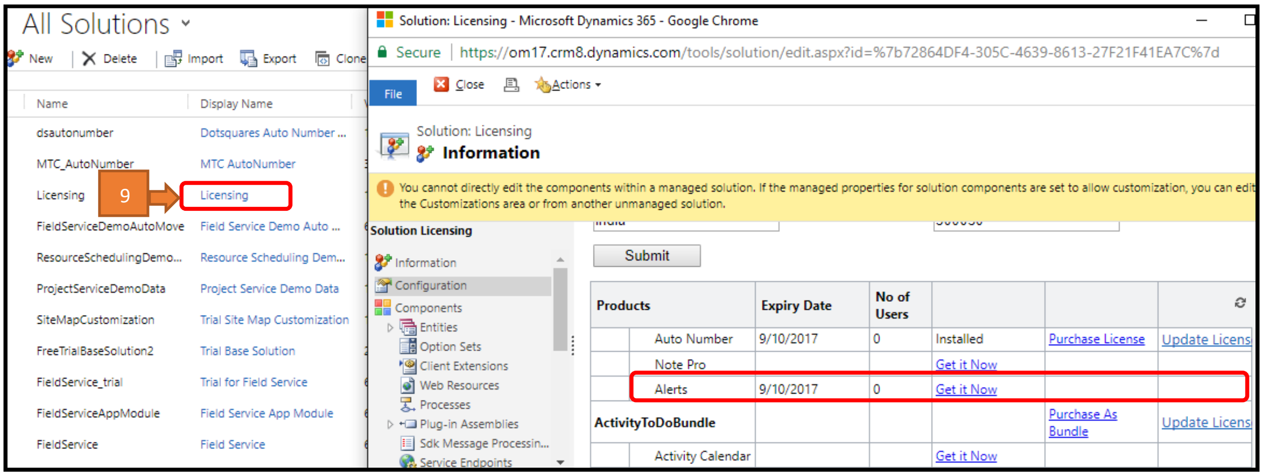
Step5:

- 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.



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