



## **Alerts4Dynamics - User Manual**

**Content**

Introduction ..... 3

Security Roles..... 3

Entity Configuration ..... 4

Alerts ..... 6

Record Based Alerts ..... 6

Rule Based Alerts ..... 8

Announcement ..... 13

Message ..... 13

Notifications..... 17

Alerts4Dynamics Logs ..... 20

Contact Us..... 21

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## Introduction

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Alerts4Dynamics is an ISV add-on 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 alerts.
- Alerts can be viewed as pop-ups, form notifications or sent as email.
- 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.
- View alerts from anywhere in CRM.

**Available for:** Microsoft Dynamics 365 CRM 9.x

**Deployment:** On-Premises, Online and Partner-Hosted

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## Security Roles

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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.
3. **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.

## Entity Configuration

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

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

**Alerts4Dynamics**

✓ ACTIVATE    ⇄ SEND REQUEST

CRM Version: 9.1    User License: 5

**Notification**

**Notification Details**  
(Notify User and Inopic about issues regarding licensing.)

From: Alex Wu (alex@4dobf.onmicrosoft.com)    To: John B (john@4dobf.onmicrosoft.com)

Notify To Inopic: ☒    Notification Interval: ☒ Once a day    ☐ Once a week    ☐ Once a month

▶ License Registration using (\*.lic) file

**Enable Entity Configuration**

**Available Entities**

- Account
- Action Card Role Setting
- actioncardregarding
- Address
- Appointment
- Article
- Bookable Resource

>> <<

**Selected Entities**

License Start Date: 06/17/2019    License End Date: 10/15/2019

Active

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

**Enable Entity Configuration**

**Available Entities**

- Purchase Order SubStatus
- Queue
- Queue Item
- Quote**
- Quote Booking Incident
- Quote Booking Product
- Quote Booking Service

>> <<

**Selected Entities**

- Account
- Lead
- Opportunity
- Order
- Product

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

**Enable Entity Configuration**

**Available Entities**

- Purchase Order SubStatus
- Queue
- Queue Item
- Quote Booking Incident
- Quote Booking Product
- Quote Booking Service
- Quote Booking Service Task

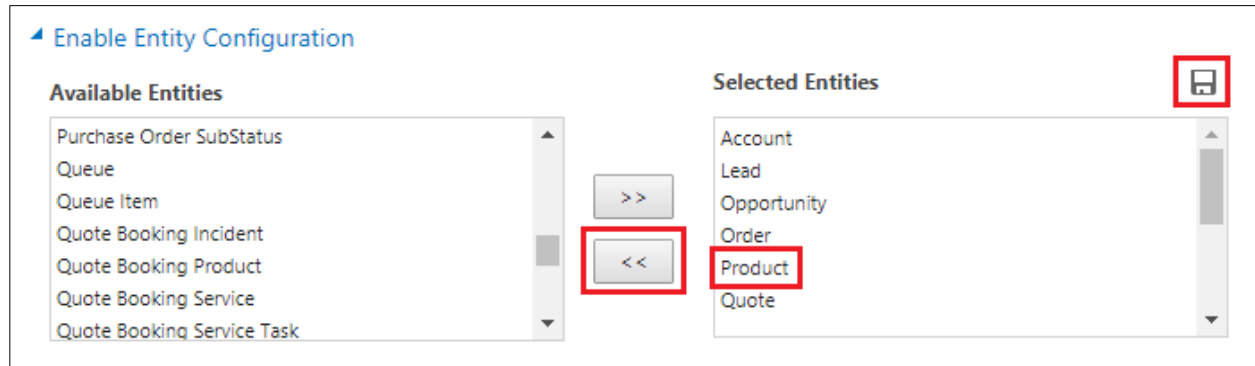
>> <<

**Selected Entities**

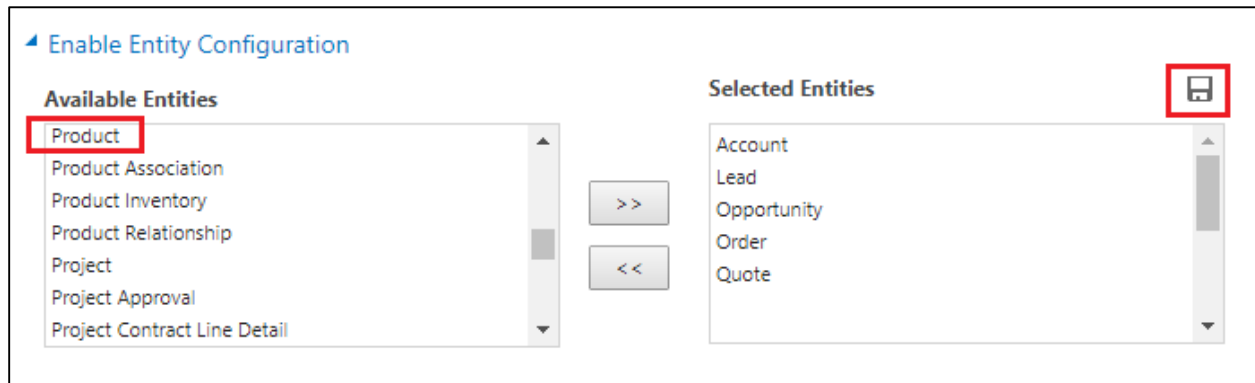
- Account
- Lead
- Opportunity
- Order
- Product
- Quote**

Save

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



- 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
invoice	Invoice	6/27/2019 10:34 AM
quote	Quote	6/25/2019 10:56 AM
salesorder	Order	6/25/2019 10:56 AM
opportunity	Opportunity	6/25/2019 10:56 AM
lead	Lead	6/25/2019 10:56 AM

## Alerts

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

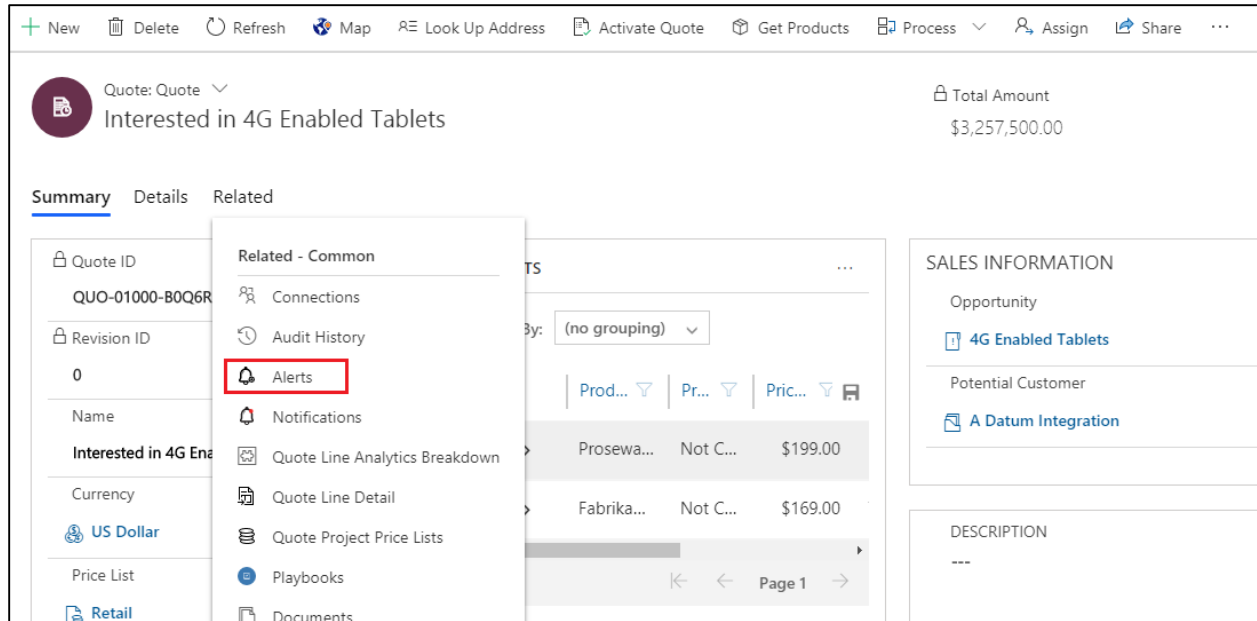
- 1. Record Based:** Create alerts for individual records.
- 2. Rule Based:** Create records for Entity Views or based on filter conditions (Fetch XML).
- 3. Announcement:** These are global alerts that are created on organization level.

## Record Based Alerts

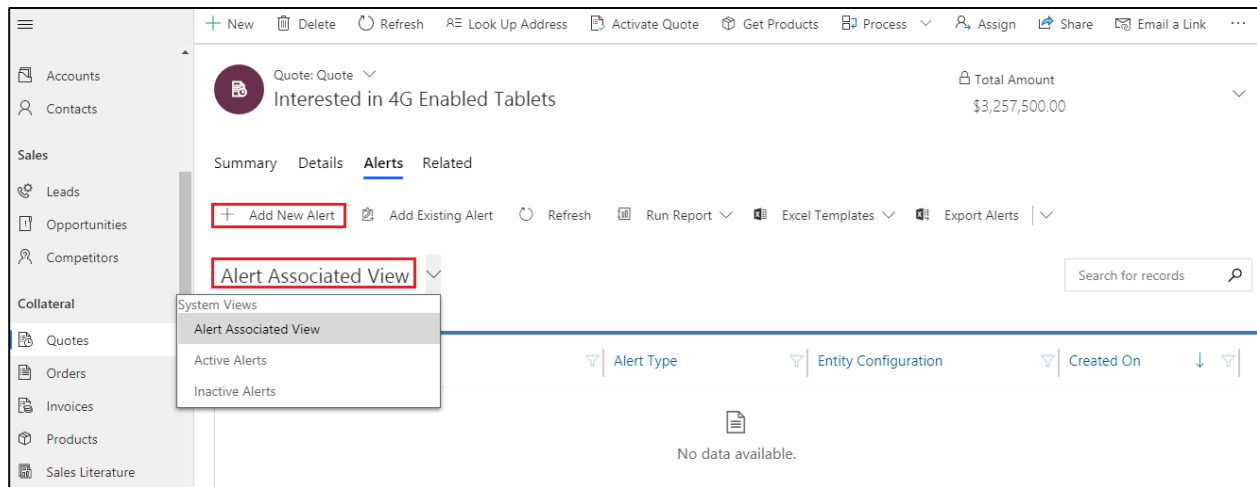
Record Based alerts are created for individual records. For instance, if a Quote is about to expire then an alert for that Quote can be created or if an Invoice is due then an alert for that specific Invoice can be created.

- 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** from the list of entities shown.

## Alerts4Dynamics – User Manual



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



3. On clicking **Add New Alert** button you are redirected to creating 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:

- a) **Name:** Enter a suitable name for this Alert.
- b) **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.
- c) **Entity Configuration:** Select one of the entities for which you have enabled Entity Configuration.
- d) **Rule Mode:** This option only appears for Rule Based alerts.

### Simple Alerts

- a) 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 in selected view of the entity in order to create a new notification for it.

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. The minimum value **X** can correspond to 2 hours.

The screenshot shows the 'New Alert' form in the Alerts4Dynamics application. The form is titled 'ALERT New Alert' and has a sidebar on the left with navigation options: Home, Recent, Pinned, Alerts4Dynamics, License Registration, Entity Configurations, Alerts, and Alerts4Dynamics Logs. The main form area has a 'General' tab selected. The fields are as follows:

- Name: Check Quote Expiry Date
- Alert Type: Rule Based
- Entity Configuration: quote
- Rule Mode: Simple
- View: Active Quotes (dropdown menu is open showing options: --Select--, Only Once, X Hour(s), X Day(s), X Week(s), X Month(s))
- Interval: Poll Interval (dropdown menu is open showing options: --Select--, X Hour(s), X Day(s), X Week(s), X Month(s))

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.

The screenshot shows the 'Check Quote Expiry Date' alert configuration page. The page has a sidebar on the left with navigation options: Home, Recent, Pinned, Alerts4Dynamics, License Registration, Entity Configurations, Alerts, and Alerts4Dynamics Logs. The main form area has a 'General' tab selected. The fields are as follows:

- Interval: Poll Interval (dropdown menu is open showing options: --Select--, X Hour(s), X Day(s), X Week(s), X Month(s))
- Interval: 2

Below the fields is a 'Messages' subgrid with a table header: Name, Message Text, Alert As, Alert Level, Process Start ..., Process End D... The subgrid is currently empty, showing 'No data available.' A red box highlights the '+ Add New Message' button.

## Advanced Alerts

Alerts can be created based on conditions.

You have to enter your query in **Fetch XML**. For eg. If you want to send alerts to 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.

The screenshot shows the Alerts4Dynamics web application interface. On the left is a sidebar with navigation links: Home, Recent, Pinned, Alerts4Dynamics, License Registration, Entity Configurations, Alerts (selected), and Alerts4Dynamics Logs. The main area displays the configuration for an alert titled 'ALERT Invoice ≥ 1000'. The 'General' tab is active, showing the following fields:

- Name:** Invoice ≥ 1000
- Alert Type:** Rule Based
- Entity Configuration:** invoice
- Rule Mode:** Advanced (highlighted with a red box)
- Fetch XML:**

```

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

```

(Also highlighted with a red box)

At the bottom, the 'Interval' section shows 'Poll Interval' set to 'X Day(s)' and 'Interval' set to '7'.

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

Invoice ≥ 1000

General Related

Interval

Poll Interval \* X Day(s) Interval \* 7

Messages

+ Add New Message Refresh ...

✓	Name	Message Text	Alert As	Alert Level	Process Start ...	Process End D...	Display End
No data available.							

## Announcement

Announcement is created at organization level. These alerts are not dependant 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.

ALERT Holiday

Owner Sam P

General Related

Name \* Holiday

Alert Type \* Announcement

Messages

+ Add New Message

✓	Name	Message Text	Alert As	Alert Level	Process Start ...	Process End D
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## 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 30<sup>th</sup> June, Holiday on 20<sup>th</sup> July, etc.

The screenshot shows the Alerts4Dynamics interface. At the top, there is a toolbar with buttons: New, Deactivate, Delete, Refresh, Assign, Share, Email a Link, Flow, Word Templates, and Run Report. Below the toolbar, the main header shows an alert icon, the name 'ALERT Holiday', and the owner 'Sam P'. The 'General' tab is selected, showing fields for 'Name' (Holiday) and 'Alert Type' (Announcement). At the bottom, there is a 'Messages' section with a red box highlighting the '+ Add New Message' button, along with 'Refresh' and a menu icon.

**Note:** Message cannot exist independently without an Alert.

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

The screenshot shows the 'New Message' page. The left sidebar contains navigation links: Home, Recent, Pinned, Alerts4Dynamics, License Registration, Entity Configurations, Alerts, and Alerts4Dynamics Logs. The main area has a 'MESSAGE New Message' header with 'Status: Active' and 'Status Reason: New'. The 'General' tab is selected, showing fields for 'Name' (---), 'Alert' (Holiday), 'Message Text' (---), 'Alert Level' (a dropdown menu is open showing 'Warning', 'Information', and 'Critical'), 'Alert As' (Warning, Information, Critical), 'Process Start Date' (---), 'Process End Date' (---), and 'Display End Date' (---). On the right, there are fields for 'Language' (English), 'Include Users', 'Exclude Users', and 'Security Roles'.

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.
- 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 as soon you open a record.
  - Form Notification:** The notification with message will be displayed under the ribbon in Form.
  - Email Notification:** The message will be sent to the users through email.

- vi. **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.**
- vii. **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.**
- viii. **Display End Date:** This is the day when notifications stop getting displayed. This date should be greater than or equal to **Process Start Date** and **Process End Date**. If it is less than Process Start Date and Process End Date then following error message will be shown **Display End Date should be greater than or equal to Process Start Date and Process End Date.**
- ix. **Language:** Alert messages can be created in multiple languages.  
**Note: Languages need to be enabled for creating messages in multiple languages.**

The screenshot shows the 'New Message' form. The 'General' tab is selected, displaying fields for Name, Alert, Message Text, Alert Level, Alert As, Process Start Date, Process End Date, and Display End Date. The 'Notification' tab is also visible, showing fields for Language (a dropdown menu with English, French, Spanish, and English selected), Include Users, Exclude Users, and Security Roles.

- x. **Include Users:** If you specify the set of users here, alerts will be shown to only these users.
- xi. **Exclude Users:** If you specify the set of users here, alerts will be shown to every user in organization except for these users.
- xii. **Security Roles:** If you select security roles here, alerts will be shown to these security roles.
- xiii. **From:** If **Email Notification** is also selected, then you need to define the user from whom the emails will be sent out.

**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.**

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

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

+ New **Activate** Deactivate Delete Refresh Assign Share Email a Link Flow Word Templates Run Report

MESSAGE  
Holiday on 30th July

Status: Active Status Reason: Draft

**General** Notification Related

Name *	Holiday on 30th July	Language	English
Alert *	Holiday	Include Users	
Message Text *	Holiday on 30th July due to elections	Exclude Users	
Alert Level *	Information	Security Roles	
Alert As *	Pop-Up, Form Notification, Email Notification	From *	Sam P
Process Start Date *	7/10/2019		
Process End Date	8/8/2019		
Display End Date	8/28/2019		

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

+ New **Draft** Deactivate Delete Refresh Assign Share Email a Link Flow Word Templates Run Report

MESSAGE  
Holiday on 30th July

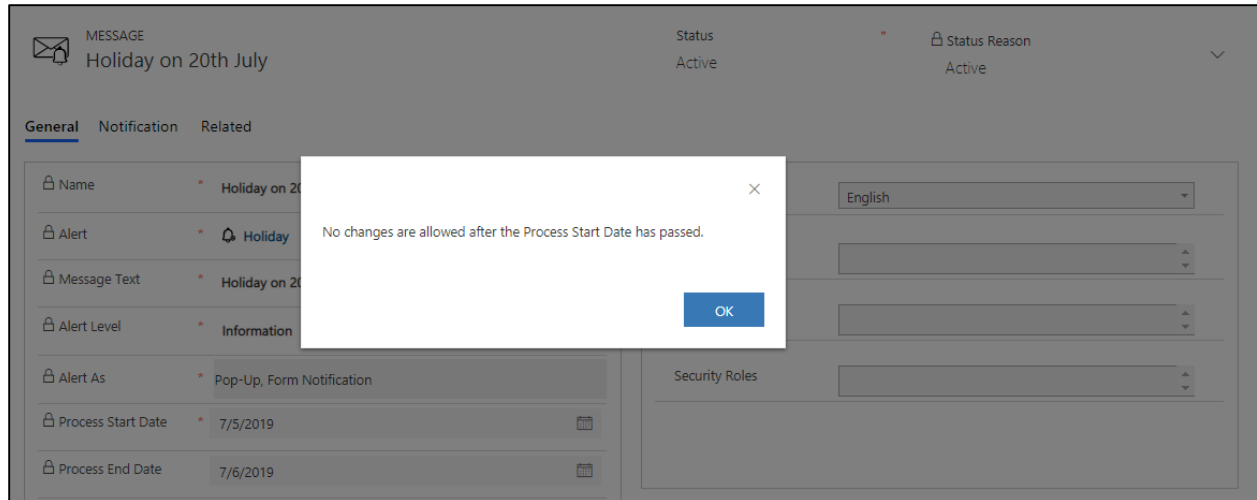
Status: Active Status Reason: Active

**General** Notification Related

Name *	Holiday on 30th July	Language	English
Alert *	Holiday	Include Users	
Message Text *	Holiday on 30th July due to elections	Exclude Users	
Alert Level *	Information	Security Roles	
Alert As *	Pop-Up, Form Notification, Email Notification	From *	Sam P
Process Start Date *	7/10/2019		
Process End Date	8/8/2019		
Display End Date	8/28/2019		

**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**.

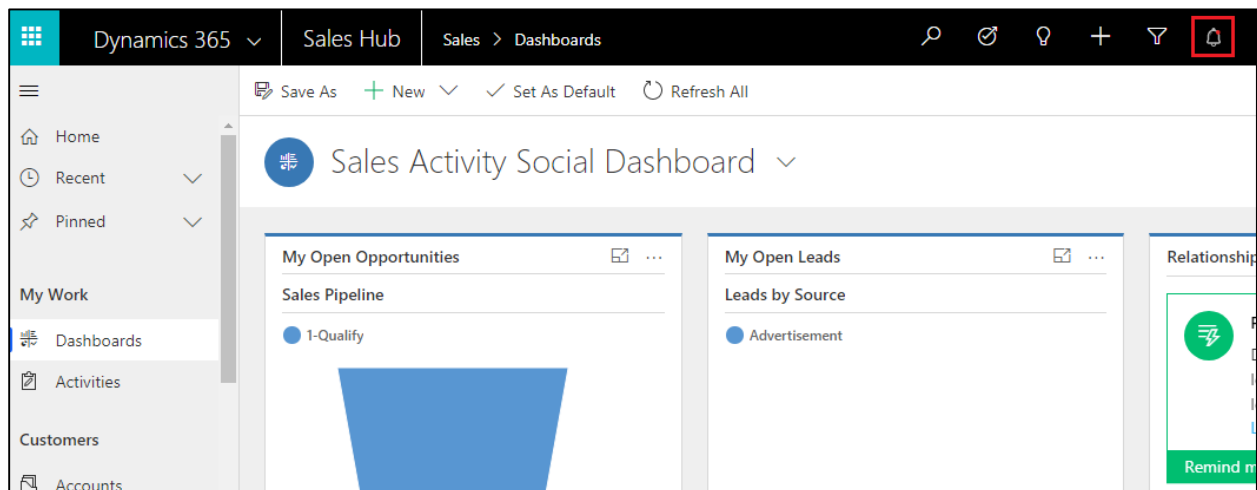




## Notifications

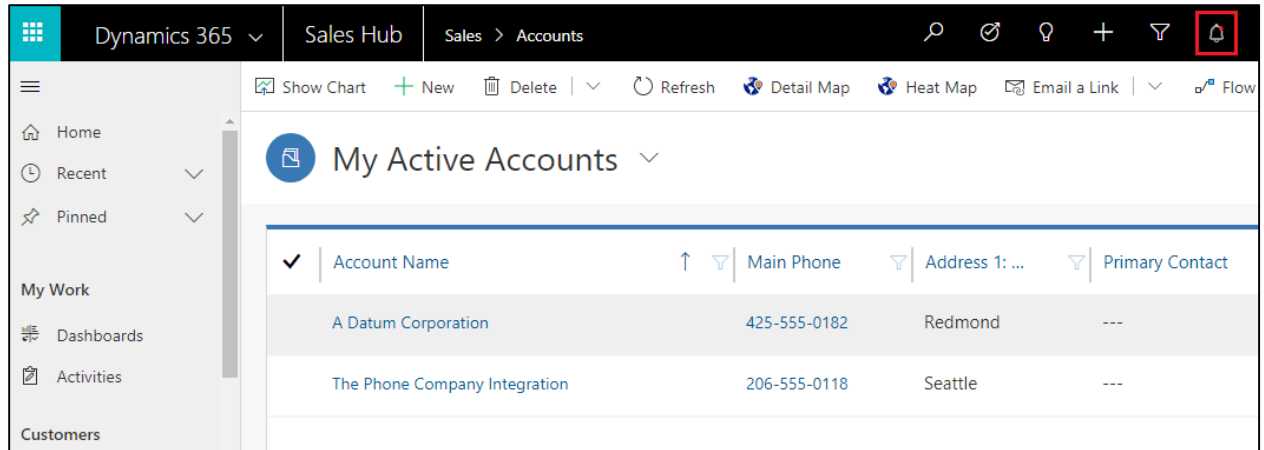
Every alert message is shown to the users as Notifications. The **Notifications** button is on the ribbon and can be accessed from anywhere in the CRM.

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

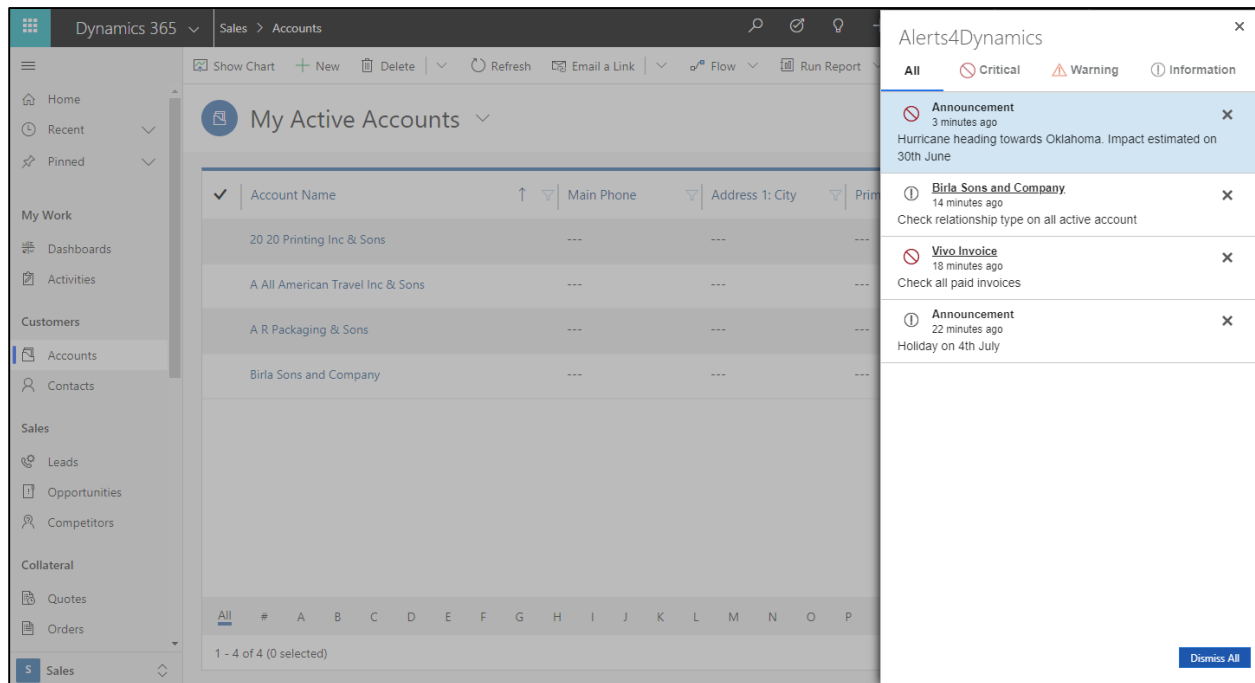


Whenever there is a new notification a red dot comes on the Notification button. Once the notification is read this red dot disappears.

## Alerts4Dynamics – User Manual



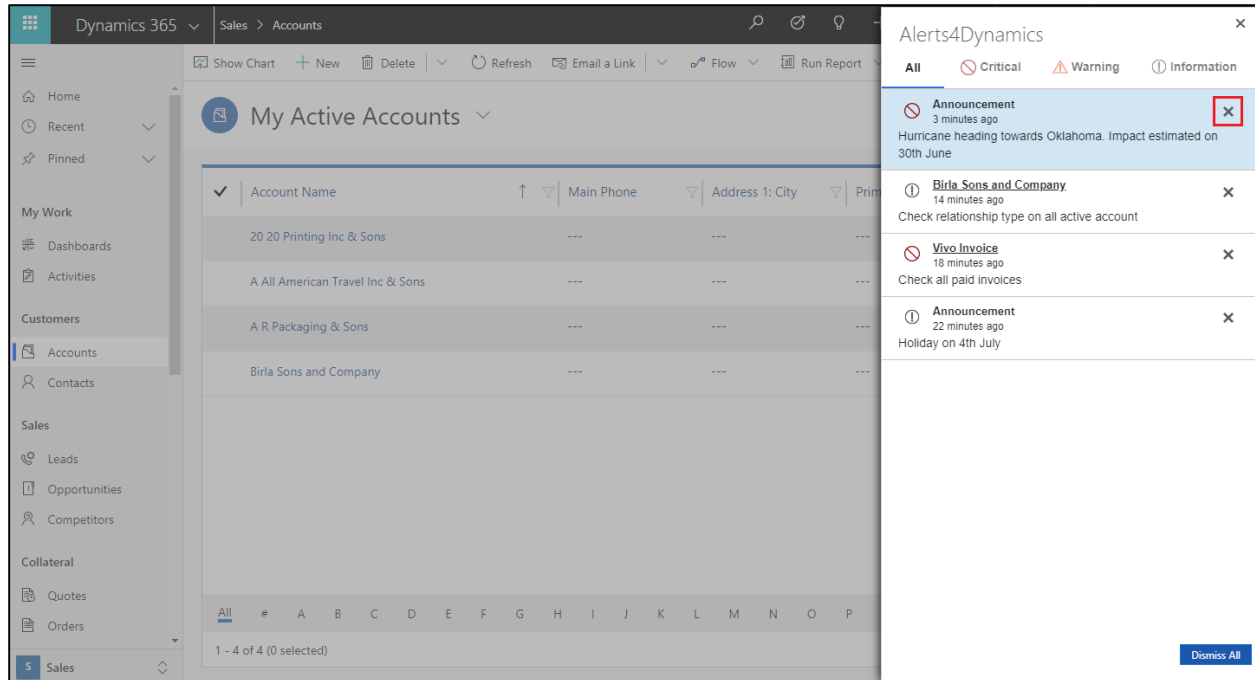
Notifications can be seen by clicking on Notification button.



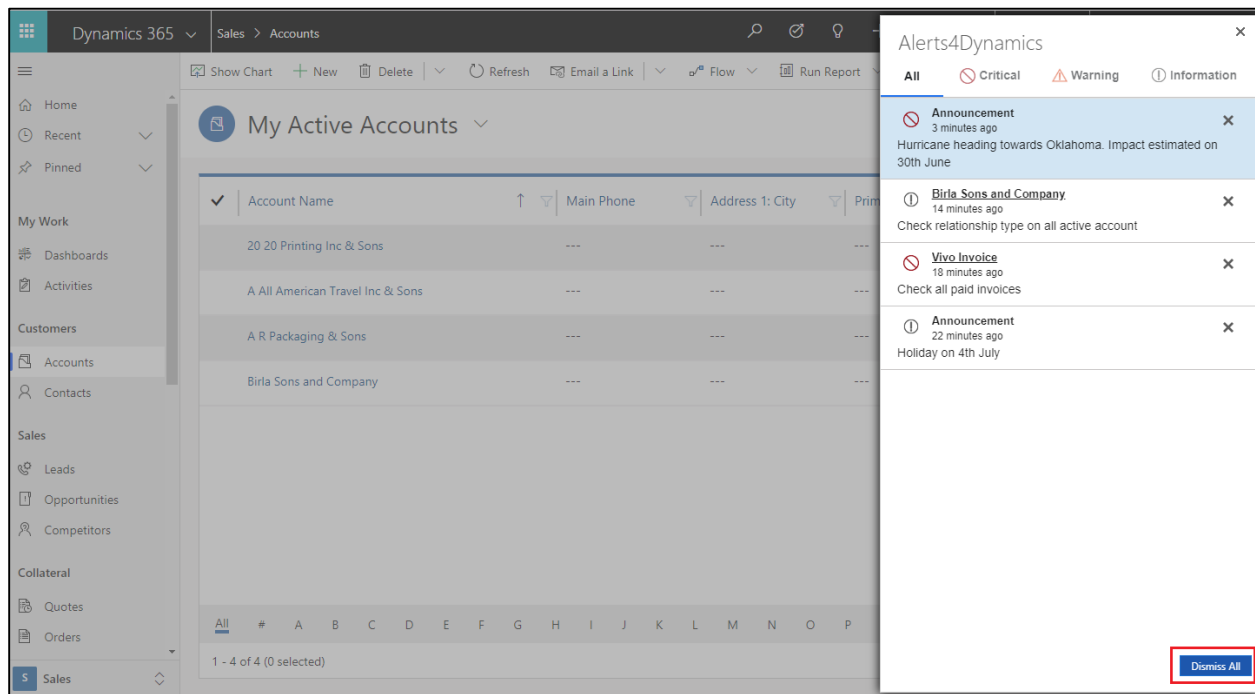
**Dismiss Notifications** Notifications can be dismissed at any time. Notifications can be dismissed in two ways:

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

## Alerts4Dynamics – User Manual




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




**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.

NOTIFICATION

Holiday - Holiday on 30th July

Owner  
 Sam P


General

Related


Read Notifications

+

Add New Read Notific...

 Refresh


...

✓	Name	User	Notification	Date	Created On	↓
	Holiday - Holiday on 30th July - Sam P	 Sam P	Holiday - Holiday on 30th July	6/27/2019 1:03 PM	6/27/2019 1:01 PM	


Dismissed Notifications

+

Add New Dismissed N...

 Refresh

...

✓	Name	User	Notification	Date	Created On	↓
	Holiday - Holiday on 30th July - Sam P	 Sam P	Holiday - Holiday on 30th July	6/27/2019 2:12 PM	6/27/2019 2:09 PM	

## 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**

Search for records

Entity Name	Process	Entity Schema Name	Created On
Knowledge Article Views	CreateAndDeleteEntityRelatio...	knowledgearticleviews	04-07-2019 11:59
Knowledge Article Views	CreateAndDeleteEntityRelatio...	knowledgearticleviews	04-07-2019 11:57
Knowledge Article Incident	CreateAndDeleteEntityRelatio...	knowledgearticleincident	03-07-2019 12:02
Knowledge Article Views	CreateAndDeleteEntityRelatio...	knowledgearticleviews	03-07-2019 12:02
Knowledge Article Views	CreateAndDeleteEntityRelatio...	knowledgearticleviews	03-07-2019 12:00

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

1 - 38 of 38 (0 selected)

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## Contact Us

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