CRM Alert – How to get started

How to Configure CRM

Before you can start taking advantage of CRM Alert and instant push notifications and approvals from Dynamics CRM you need to complete some simple steps to set things up.

1. Download the managed solution for Dynamics CRM

CRM Alerts require a component installed in your CRM system to send out the push notifications to your users whenever a predefined condition occurs in the system. This component can be downloaded on the following link:

2. Install the managed solution in your CRM system (System Administrator role required)

The solution downloaded above needs to be installed by a System Administrator. Once it has been installed you are ready to use CRM Alerts with your own CRM data.

3. Create a new CRM workflow process

Head over to Settings -> Processes and create a new workflow process for whatever event you would like to be notified of. This can be creation or assignment of a lead or a case, change of status of an opportunity, X number of days from the creation of a quotation etc.

4. Download and install our free package of standard alerts (Optional)

To get started quickly with some basic alerts we have prepared a free solution with workflows based on standard Dynamics CRM functionalities. This is a good way to get started and to acquaint yourself with CRM Alerts before setting up your own workflows for your specific CRM adaptations.

Find out more about how to use CRM Alerts by visiting http://crmalerts.com