



Alerts4Dynamics



White Paper

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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, Dataverse (Power Apps).

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.

The screenshot shows the Alerts4Dynamics configuration page. At the top, there are buttons for 'ACTIVATE' and 'SEND REQUEST'. Below that, the CRM Version is 9.1 and the User License is 5. The 'Notification' section is expanded, showing 'Notification Details' with 'From' and 'To' fields. The 'License Registration using (.lic) file' section has a 'Choose file' button and a 'Register' button. The 'Enable Entity Configuration' option is highlighted with a red box. Below this, there are two lists: 'Available Entities' and 'Selected Entities'. The 'Available Entities' list includes Playback activity attribute, Position, Price List, Product Association, Product Relationship, and Queue. The 'Selected Entities' list includes Account, Contact, Invoice, Opportunity, and Product. At the bottom, there are fields for 'License Start Date' (06/17/2019) and 'License End Date' (10/15/2019).

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.

The screenshot shows the 'New Alert' form. The 'General' section is active. The 'Name' field is empty and has a red asterisk. The 'Alert Type' field is a dropdown menu with a red asterisk. The dropdown menu is open, showing three options: 'Announcement', 'Rule Based', and 'Announcement'. The 'Announcement' option at the bottom is highlighted in blue.

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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

- Select--
- 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 4 items

Is Dismissible

- Select all
- Pop-Up
- Form Notification
- Email Notification
- User Preference

Notification Audience

Define Audience

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

Notification Audience

Include Users

Exclude Users

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

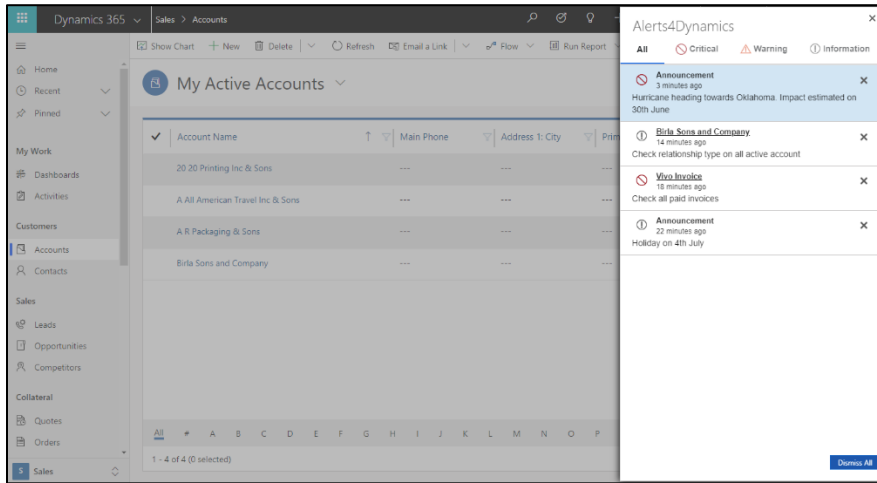
- German
- French
- Hebrew

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.



Contact Us:

INOIGIC (MUMBAI - INDIA)

M/S. INOIGIC TECH (INDIA) PVT. LTD.

A/301, Everest Nivara InfoTech Park,
TTC Industrial Area, MIDC, Turbhe
Navi Mumbai, Maharashtra 400705
INDIA

E-mail: crm@inogic.com

Skype: [crm@inogic.com](https://www.skype.com/people/inogic)

Twitter: @inogic

View Log

View log of alerts read/dismissed by users.

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