



**Alerts4Dynamics
White Paper**

Alerts4Dynamics - White Paper

Aim:

Alerts4Dynamics is an ISV add-on for Dynamics 365 assisting managers to create and manage alerts in Dynamics 365.

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 Record Based/Rule 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 notification creation start date, notification creation end date and notification display end date.
- Alerts can be configured to be shown to particular set of audience.
- View alerts from anywhere in CRM.

Supported Versions

Versions: Microsoft Dynamics 365 v9.0 and above.

Deployment Models: On-Premises, Online and Partner-Hosted.

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 displays the Alerts4Dynamics interface for license registration. It includes fields for CRM Version (9.1) and User License (5). The 'Notification' section is expanded, showing 'Notification Details' with 'From' (Alex Wu) and 'To' (John B). Below this, there's a section for 'License Registration using (.lic) file' with a 'Choose file' button. The 'Enable Entity Configuration' section is highlighted with a red box, showing 'Available Entities' (Playbook activity attribute, Position, Price List, Product Association, Product Relationship, Queue) and 'Selected Entities' (Account, Contact, Invoice, Opportunity, Product). License Start Date is 06/17/2019 and License End Date is 10/15/2019.

Alert Types

Managers can create three types of alerts for the users in Dynamics 365 CRM i.e. Announcement, Record Based and Rule Based. Record Based alerts are created from the record itself.

The screenshot shows the 'New Alert' form in Alerts4Dynamics. The form has a title 'ALERT New Alert' with a bell icon. Under the 'General' section, there are fields for 'Name' (required, marked with a red asterisk) and 'Alert Type' (required, marked with a red asterisk). The 'Alert Type' dropdown menu is open, showing options: 'Announcement', 'Rule Based', and 'Announcement' (highlighted in blue).

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Alert Level

Alert messages can be of **Information, Warning or Critical** level.

The screenshot shows a configuration form for an alert. The 'Alert Level' dropdown menu is open, showing three options: 'Warning', 'Information', and 'Critical'. The 'Alert' field is set to 'Holiday'. Other fields include 'Name', 'Message Text', 'Alert As', 'Process Start Date', 'Process End Date', and 'Display End Date'. On the right side, there are fields for 'Language' (set to English), 'Include Users', 'Exclude Users', and 'Security Roles'.

Define Mode of Alert

Alerts can be viewed as Pop-Ups, Form Notifications and sent as Email to the defined users.

The screenshot shows the 'Define Mode of Alert' section of the configuration form. The 'Alert As' dropdown is open, showing a search bar and three options: 'Select all', 'Pop-Up', and 'Form Notification'. The 'Process Start Date' field has a dropdown menu open, showing three items: 'Select all', 'Pop-Up', and 'Form Notification'. The 'Process End Date' and 'Display End Date' fields are empty.

Define Audience

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

The screenshot shows the 'Define Audience' section of the configuration form. The 'Language' dropdown is set to 'English'. The 'Include Users', 'Exclude Users', and 'Security Roles' fields are empty. The 'Security Roles' field has two tags: 'Account Manager' and 'CEO-Business Manager'.

View Notifications

Alert messages for all alert levels can be seen in notifications until they are dismissed.

The screenshot shows the Alerts4Dynamics notification interface. The notification list includes: 'Announcement 3 minutes ago: Hurricane heading towards Oklahoma. Impact estimated on 30th June', 'Birla Sons and Company 14 minutes ago: Check relationship type on all active account', 'Vivo Invoice 15 minutes ago: Check all paid invoices', and 'Announcement 23 minutes ago: Holiday on 4th July'. The interface also shows a 'Dismiss All' button at the bottom right.

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View Log

View log of alerts read/dismissed by users.

NOTIFICATION
Holiday - Holiday on 30th July

Owner
Sam P

General Related

Read Notifications + Add New Read Notific... Refresh ...

<input checked="" type="checkbox"/>	Name	User	Notification	Date	Created On
<input checked="" type="checkbox"/>	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 ...

<input checked="" type="checkbox"/>	Name	User	Notification	Date	Created On
<input checked="" type="checkbox"/>	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

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