



**User Manual** 

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# Introduction

Alerts4Dynamics is a productivity app 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:

- Provision to create more engaging messages with all kinds of text formatting using Message Rich Text.
- 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.
- Provision to search for notifications on Notification panel.

**Available for:** Microsoft Dynamics 365 CRM 9.x and above, Dataverse (Power Apps). **Deployment:** On-Premises and Online.

# **Security Roles**

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.
- 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:

- It is necessary to assign any one of the above security roles to use Alerts4Dynamics solution
- System Administrator has all the rights that Alerts4Dynamics administrator has
- For other than the English language, the user must have one of the following roles Alerts4Dynamics User, Alerts4Dynamics Manager, or Alerts4Dynamics Admin even if the user is system admin.
- When a new user is created and added to the instance, the user will automatically be assigned with the 'Alerts4Dynamics User' Security Role.
- If System Admin changes the Business Unit of a user, then "Alerts4Dynamics User" security role will automatically get applied to the user of that respective Business Unit.

Follow the simple steps given below to assign security roles to CRM users.

 Navigate to Alerts4Dynamics App -> License Registration -> Click on the Assign Security Role button.

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=		
命 Home	Alerts4Dynamics	
🕒 Recent 🗸 🗸	🗸 ACTIVATE 🛛 🖚 SEND REQUEST 🌲 ASSIGN SECURITY ROLE	
🖈 Pinned $\checkmark$	License Registration     Click here to assign the Alerts4Dynamics	cs User security role to all the users
Alerts4Dynamics	CRM URL	Organization
🗘 Alerts	CRM Version 9.2	User License 50
Entity Configurations	<ul> <li>Notification</li> </ul>	
Message Texts	Notification Details (Notify User and Inonic about issues regarding licensing.)	
Notifications	From	To Drive (Creater State of the prior of creater and appr)
Alerts4Dynamics Logs	Notify To Inogic	Notification Interval Once a day Once a week Once a month
🗘 Configurations	License Registration using (*.lic) file	
License Registration	Enable Entity Configuration	
	Available Entities	Selected Entities
	Account ACS channel instance account Action Card Regarding Action Card Regarding Action Card Rose Exiting Action Card Usage Aggregation Action Card Usage Ag	· ·

• A confirmation dialog box will appear. Click on **OK**.

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Alerts4Dynamics	CRM URL		Organization	-							
🗘 Alerts	CRM Version 9.2	Confirm dialog	×								
Configurations	Notification	A	ala ta waara?								
Message Texts	Notification Details (Notify User and Inogic about issues regarding licens	Are you sure you want to assign security i	ole to users:								
Ontifications	From Bine with stream studying a				-	-	-	-			
Alerts4Dynamics Logs	Notify To Inogic					Once a	week		Once	a month	
Configurations	License Registration using (*.lic) file										
License Registration	<ul> <li>Enable Entity Configuration</li> <li>Available Entities</li> </ul>										
	Account	o	Cancel					<u>_</u>			
	ACS channel instance account Action Card Regarding	>>									
	Action Card Role Setting Action Card Usage	<<									
	Action Card Usage Aggregation	•						Ŧ			

• The **Alerts4Dynamics user** security role will now be assigned to all the users present in Dynamics 365 CRM.

	Dynamics 365	Alerts4Dynamics			New Ic	ook 🔵	Q	Q	+	$\mathbb{Y}$	٢	?	۵	Ð	ų
≡															
ଜ	Home	Alerts4Dynamics	6												
Ŀ	Recent 🗸	🗸 ACTIVATE 🗢 SEND REQUEST 🚣 A	SSIGN SECURITY ROLE												
\$	Pinned 🗸	- License Registration													
Ale	ts4Dynamics	CRM Details			Organization										_
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F.	Alerts4Dynamics Logs	Notify To Inogic		80%					Once a	week		Onc	e a month		
4	Configurations	License Registration using (*.lic) file													
I E	License Registration	Enable Entity Configuration													
		Available Entities			Selected Entitie	es									
		Account ACS channel instance account	<u> </u>		3						*				
		Action Card Regarding													
		Action Card Usage		<<											
		Action Card Usage Aggregation	-								-				

• Now click on "**OK**" to close the pop up.

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合 Home	Alerts4Dynamics										
🕒 Recent 🗸 🗸	✓ ACTIVATE SEND REQUEST → ASSIGN	SECURITY ROLE									
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Alerts4Dynamics	CRM URL		Organization								
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C Entity Configurations	A Notification		×								
Message Texts	Notification Details	Alerts4Dynamics User security role has be	en assigned to all								
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License Registration	Enable Entity Configuration		ок					_			
	Available Entities		UK								
	ACS channel instance account										
	Action Card Regarding Action Card Role Setting										
	Action Card Usage	<<									
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- You can also follow another alternative method to set up security roles, as mentioned below:
- Go to Advanced Settings --> Settings --> Security.

		Alerts4Dy	namics – Usei	r Manual		
🗰 Dyna	imics 365 🔍	Settings 🗸	Business Mana	gement		
Settings	<b>O</b>					
Business		Customization	Syste	em		
Busir	ness Manageme	Customization	15 🕹	Administration	∑¢	Email Configuration
Temp	plates	Solutions	£	Security	0	Activity Feeds Confi
Prod	uct Catalog	Microsoft App	Source	Data Management		Activity Feeds Rules
kervi	ce Management	← Plug-In Trace	Log	System Jobs		Dynamics 365 App f
Mobi	ile Offline	Solutions Hist	ory	Document Manage	Ŷ	Sales Insights
ç¦ʻʻʻƏ Sync	Error			Auditing		

• Select Users.

	Dynamics 365 🗸	Settings ~	Security	
Secu	rity			
Which	feature would you like to	work with?		
	Add new users. Edit informati users.	on about users and deactiv	ate user records. Manage the teams, roles, and licenses assigned to	Teams Add new teams and new members to existing te
	Security Roles Create new security roles. Ma	nage and delete existing se	curity roles for your organization.	Business Units Add new business units. Edit and deactivate exis
	Field Security Profiles Manage user and team permi	issions to read, create, or w	rite information in secured fields.	Hierarchy Security Configure hierarchy security, including enabling deep the hierarchy goes, and specify the entities
	Positions Add new Position. Modify the	Position description.		Access Team Templates Add new team templates. Modify the team temp

• Select user --> Click on MANAGE ROLES.



• Click on any one of the security roles --> Click **OK**.

Pole Name	Rusiness Unit	
	business onit	
Account Manager	veganworld	
Activity Feeds	veganworld	
Alerts4Dynamics Administrator	veganworld	
Alerts4Dynamics Manager	veganworld	
Alerts4Dynamics User	veganworld	
Attach2Dynamics Administrator	veganworld	
Attach2Dynamics User	veganworld	-
As you assign security roles nd the ability to extract your o nultiple clients (i.e. Dynamics 3	to your users, you will enable ac data. Access is enabled through 365 for Outlook, Dynamics 365 for	or

# **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

Aler 🖏	ts4Dynamics					
✓ ACTIVATE	SEND REQUEST					
CRM Version	9.1		User License	5		
Notification						
Notification Detai (Notify User and Inc	ils ogic about issues regarding licensing.)					
From	Alex Wu (alex@a4dobf.onmicrosoft.com)		То	John B (john@a4dobf.onr	microsoft.com)	
Notify To Inogic	<ul> <li>Image: A start of the start of</li></ul>		Notification Interval	Once a day	Once a week	<ul> <li>Once a month</li> </ul>
License Regis	tration using (*.lic) file					
Enable Entity	Configuration					
Available Entiti	es		Selected Entities			
Account Action Card Role actioncardregard	Setting	* >>				
Address Appointment		< <				
Article		-				•

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

vailable Entities		Selected Entities	
Purchase Order SubStatus		Account	
Queue		Lead	
Queue Item	>	> Opportunity	
Quote		Order	
Quote Booking Incident	<	< Product	
Quote Booking Product			
Ouote Booking Service	-		Ψ

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

Available Entities		Selected Entities	
Purchase Order SubStatus		Account	
Queue		Lead	
Queue Item		>> Opportunity	
Quote Booking Incident		Order	
Quote Booking Product		<< Product	
Quote Booking Service		Quote	
Quote Booking Service Task	-		*

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

	Alerts4Dynamic	s – User Manual	
Enable Entity Configuration		Selected Entities	
Available Entities		Account	
		Account	
Oueue Item	>	> Opportunity	
Quote Booking Incident		Order	
Quote Booking Product		< Product	
Quote Booking Service		Quote	
Quote Booking Service Task	-	-	

5. 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.

Available Entities		Selected Entities	
Product		Account	
Product Association		Lead	
Product Inventory		>> Opportunity	
Product Relationship		Order	
Project		<< Quote	
Project Approval			
Project Contract Line Detail	-		-

Note: Users cannot create Entity Configurations. They can only enable and disable Entity Configurations for selected entities.

6. To view the Entity Configurations go to Alerts4Dynamics App → Entity Configurations where all the enabled Entity Configurations can be viewed.

=	~	🛱 Show Chart	$\odot$ Click2Undo   $\vee$	🗟 Restore Deleted	🖔 Refresh	🗭 Log In	🤞 Visualize this vi	ew 🖾 Email a	Link   $\vee$ :
☆ Home	A	ctive Entity O	Configurations ~				😨 Edit columns	√ Edit filters	Filter by keyword
🕒 Recent 🗸 🗸									
🖈 Pinned 🗸 🗸		Entity Name ~		Entity Displa	y Name ∽				Created On $\downarrow$ $\checkmark$
Alerts4Dynamics		quote		Quote					10/25/2022 10:41 AM
🗘 Alerts		invoice Invoice							9/5/2022 3:34 PM
😨 Entity Configurations		salesorder		Order					9/5/2022 11:45 AM
Message Texts     .		opportunity		Opportuni	ty				9/5/2022 11:45 AM
Q Notifications	Notifications lead Lead								9/5/2022 11:44 AM
Alerts4Dynamics Logs     Configurations	contact Contact							9/5/2022 11:44 AM	
Dicense Registration		account		Account					9/5/2022 11:44 AM

# Alerts

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

- **1. Record Based:** Create alerts for individual records.
- 2. Rule Based: Create alerts based on filter conditions.
- 3. Announcement: Create alerts for organization level announcement.
- **4.** Event Based: Create alert on trigger of an event. (For e.g., On Quote Activation an alert should be created).

# **Display of Alerts**

Alerts4Dynamics app displays Alert in the following three ways:

- Pop-ups
- Form Notifications Dialog & Bar
- Email Notifications

#### Alert as Pop up:

If user sets the alert as **'Pop up'** while configuring the message, an alert will show up only through the global notification bell button. It will not pop-up on opening of the record. User has to click on the bell icon to see the Pop up notification.

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=	← 🗗 🖬 Save 👹 Save & Close + New	🛱 Open Org Chart 🗋 Deactivate 🧖 Connect 🗸	Add to Marketing List : 🛛 🖻 Share 🗸
My Work 왜 Sales accelerator 策 Dashboards	A Datum Fabrication - Saved Account - Account ~ Summary Project Price Lists Details Servio	 Annual Rev cing Files Related ∨	venue Number of Employees
Activities	ACCOUNT INFORMATION	Timeline + ♡ ፲≣ :	Assistant
Customers	Account Name*	✓ Search timeline	Notifications
Accounts	A Datum Fabrication	Denter a note	
Contacts Sales	Phone	Auto-post: Account A Datum FabricationAccount: Created By	No notifications or suggestions Check back later to see what's new and stay up to date.
🌾 Leads	Fax		
Opportunities	Non-Jan	hŝ	Primary Contact
冬 Competitors	Website		
Collateral			CONTACTS
S Sales	Parent Account		No data available

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🖉 Sales accelerator	A. Datum Corporation		
2 Activities	Adventure Works		
াল্ল Dashboards	Alpine Ski House		
Customers	Fabrikam, Inc.		
Accounts	Eyzher Technologies		
A Contacts	Jack Smith Production House		
Sales	Northwind Traders		
🎸 Leads	Sales Account		
• Opportunities	Trey Research		
S Sales	1 - 10 of 10		Dismiss All

# <u>Alert as Form notification – Dialog</u>

If user sets the alert as **'Form Notification – Dialog'** then the alert will pop-up after opening a record without having to click on the global notification bell icon.

Record specific ale Message	rt - Unsaved				Active Status	0 ~
General Notification	Kelated V					
Notification Configuration	on					
Alert As	* Form Notification		Display As	* Dialog		$\sim$
Display Until		$\sim$	Alert Level	* Information		
Is Dismissible	Yes					
Auto Dismissible	No					
Notification Audience						
Include Users		÷	Exclude Users			*
Security Roles		ش ب	Teams			*

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<ul><li>ᢙ Home</li><li>③ Recent ∨</li></ul>	My Active Accounts ~	All 🚫 Critical 🔥 Warning	() Information
🖈 Pinned 🗸 🗸	C G Account Name ↑ ~	A Datum Fabrication	
My Work	A Datum Fabrication	<ul> <li>less than a minute ago</li> <li>A Datum Fabrication Form dailog alert notification</li> </ul>	×
🖉 Sales accelerator	A. Datum Corporation		
Activities	Adventure Works		
静 Dashboards	Alpine Ski House		
Customers	Fabrikam, Inc.		
Accounts	Eyzher Technologies		
A Contacts	Jack Smith Production House		
Sales	Northwind Traders		
🎯 Leads	Sales Account		
1 Opportunities	Trey Research		
S Sales	1 - 10 of 10		Dismiss All

# <u>Alert as Form notification – Bar</u>

If user selects **'Display As'** option as **'Bar'** then an alert will be displayed on the top of the record in the form of bar.

Record specific ale Message	ert - Saved					Active Status	ing Tanàna	0	~
General Notification	Related $\checkmark$								
Notification Configurati	ion								
Alert As	* Form Notification			Display As	* Bar				
Display Until			$\sim$	Alert Level	* Information				
Is Dismissible	Yes							Se la construction de la constru	
Auto Dismissible	No								
Notification Audience									
Include Users		*		Exclude Users				*	
Security Roles		*		Teams				*	

Save 🐉 Save 8	د Close 🕂 New 🛞 UnLink	라 Oper	n Org Chart 🛛 🔁 Deactivate 🦓 Connect   🗸 🖷 Add to Marketing List	옥, Assign 🛛 Email a Link	Î Delete
A Datum Fabrication Form bar	alert notification				
AD A Datum Fab	prication $_{\rm nt}$ $\sim$				Annual Revenue Number of Employees Complete
ummary Accounting	Details Project Price Lists	Details	Assets and Locations Field Service Scheduling Files Related		
ACCOUNT INFORMAT	TION		Timeline	+ 7 15 :	Primary Contact
Account Name	* A Datum Fabrication				
Phone	101-00-010	S	Enter a note	0	CONTACTS
Email	and an extension	5	Auto-post on A Datum Fabrication	9/25/2020 3:19 PM 🗸	
Fax	1028.8				No data available.
Website					
Parent Account					
Ticker Symbol					
Relationship Type					
Product Price List					

*Note: An alert will be displayed through the global notification bell button only if checked from within the context of the record.* 

#### Alert as Email Notification

If the user sets alert as 'Email Notification' then the alerts will be notified to the users through an email.

ou have a new n essage	otification related to A Datun	Active Status	Ran milli - A	
eneral Notificatior	n Related $\vee$			
wessage type	Simple			
Alert	* 🗘 You have a new notification rela	ted to A Datum PVT LTD		
Process Start Date	* 5/23/2023			
Process End Date				
Notification Configura	tion			
Alert As	* Email Notification	Alert Level	* Information	
		Email Workflow	* 🖾 Account alert notification	

FILE	ADVANCE	D FIND	LIST TOOL	.S AGES				Microsoft	Dynar	nics 365						Andy Johnson 🕝 bak900 😞	
New Email	Edit S	how As +	Book Delete Email	Add to Queue ☆ Follow	+ Unfollow	Assign Email Messages	<ul> <li>Share</li> <li>Copy a Link</li> <li>Email a Link</li> </ul>	Run Workflow	Start Dialog	Run Report +	Excel Templates +	Word Templates -	Export Email Messages 🗸	Export Selected Records			
	From		Subject						1	Reg	arding	Priorit	/	Actual E	nd ↓		
	sam sar	m	You have a	new notification	related to A	Datum PVT	LTD CRM:0017	073				Norma	d	10,	6/2020		

d-only This record's sta	ttus: Completed	
have a new n $\cdot$ Email $\sim$	otification related to A Datum PVT LTD CRM:0017073	Normal          Received         Andy John           Priority         Due         Status Reason         Owner
Related		
From	⊙ A, sam sam	Attachment 🖷 See all rec
То	⊙ A Andy Johnson	✓         File Name ↑ ∨         Followed ∨         File Siz
Cc		
Bcc		No data available.
Subject	You have a new notification related to A Datum PVT LTD CRM:0017073	4
<ul> <li>This content w email service a may be unsafe</li> <li>Datum PVT LTD a</li> </ul>	as not generated by Microsoft and may not be secure. The design seen by your recipients may not look like this preview, depending on their ind device. To confirm your email looks like this in all indoxes, use Inbox previews. External links in the preview aren't managed by Microsoft and . Open the full email (some images may not display).	

# Set User Preference

Alerts4Dynamics gives a provision of setting up the preferences to receive an alert which completely leaves it to the users to choose how they want to receive an alert.

### Scenario 1:

Admin configures an alert as **'User Preference'**. Let's say an admin does not have any specific preference to receive an alert.

#### Admin – No preference

But there are another two users having a preference to receive an alert in the following manner:

**User 1 – Email Notification** 

User 2 – Pop up

#### Outcome:

Admin will not be able to see an alert since an alert is configured as only 'User Preference' and admin did not set any preference to receive an alert.

User 1 will receive an alert only through Email.

User 2 will be able to see an alert only as a Pop up.

# **Steps to set User Preference**

1) Navigate to Advanced settings  $\rightarrow$  Settings  $\rightarrow$  Security  $\rightarrow$  Users.



🗰 Dynamics 365 🗸	Settings ~ Busine	ess Management	
Settings			
Business	Customization	System	Process Center
Business Manageme	Customizations	Semail Configuration	Processes
Templates	Solutions	Security 🔓 😽 Activity Feeds Confi	□/ <sup>□</sup> Microsoft Flows
Product Catalog	Microsoft AppSource	Data Managem Security 📄 Activity Feeds Rules	
🍾 Service Management	←■ Plug-In Trace Log	System Jobs Dynamics 365 App f	
Mobile Offline		Document Manage Sales Insights	
ငှိုံ့ Sync Error		Auditing	



# 2) Open the user record.

⇔ Enabled Users ▶	
□   Full Name ↑   Site	Business Unit   Title   Position   Main Phone
Physician Sectors	1000
Partecipation	Land
+ Parent any Online	Hello Contraction
Construction of the American Street Str	Laters
*Descepto	5404
Provide approx	antes
And Alexan	Lans.
Instant Device Account	1400
101.014	Laters
Manager Special Page	5404
mahanan	1450
Nova Approbate replication	Land
Non-Referentiatelese Conservations	6404
Brook and	Laine
sam sam	5698 230594

3) For Admin - Do not set any preference (make sure it is blank).

user ▼ sam sam ™
<ul> <li>The information provided in this form is viewable by the entire organization.</li> <li>This user's information is managed by Office 365. To edit this information visit the User Administration section of the Office 365 Portal.</li> </ul>
► Details
Alerts4Dynamics
Alert As

For User 1 – Set the preference as 'Email Notification'.

Andy Johnson =
<ul> <li>The information provided in this form is viewable by the entire organization.</li> <li>This user's information is managed by Office 365. To edit this information visit the User Administration section of the Office 365 Portal.</li> </ul>
▶ Details
Alerts4Dynamics
Alert As Email Notification

For User 2 – Set the preference as 'Pop up'.

John S	Shaw ™≡	
<ul> <li>The information provi</li> <li>This user's informatio</li> </ul>	ded in this form is viewable by the entire organization n is managed by Office 365. To edit this information v	n. isit the User Administration section of the Office 365 Portal.
▶ Details		
▲ Alerts4Dynar	nics	
Alert As	Pop-Up	

4) Next, select user from whom an email is to be sent as **'From'** in Alerts4Dynamics configurations. For this, navigate to **Alerts4Dynamics app** → **Configurations**.

	Dynamics 365	
≡		
ு	Home	
Ŀ	Recent 🗸	
х?	Pinned 🗸	
Aler	rts4Dynamics	
۵	Alerts	
Ø	Entity Configurations	
$\bigcirc$	Message Texts	
٥	Notifications	
Ē	Alerts4Dynamics Logs	
0	Configurations	
0	License Registration	

5) Open the configuration record.

	Dynamics 365 A	lerts4D	ynamics					م
=		~	🛱 Show Chart	$\odot$ Click2Undo   $\vee$	🐻 Restore Deleted	🖔 Refresh	🕻 Log In	🤞 Visualize this view
ណ៍	Home	А	ctive A4D Co	nfigurations ~				😨 Edit columns
Ŀ	Recent $\checkmark$			5				
\$	Pinned 🗸		Name 1 🗸					
Ale	rts4Dynamics	0	A4D Configurati	on				
Ç.	Alerts		0					
Ø	Entity Configurations							
	Message Texts							
۵	Notifications							
E.	Alerts4Dynamics Logs							
٩	Configurations							
0	License Registration							

6) Select the user (this is the user from whom an alert will be sent via email to that user who has preference to receive an alert set as 'Email Notification').



### 7) Configure and activate the message.

Alert as user preferer	ICE - Saved		Active Status	Active Status Reason	0	Ψ.
General Notification R	elated $\sim$					
Notification Message						
🗄 Message Text	(name) account alert notification					
Message Rich Text	Enter text	n  Ξ Ξ � � + ₩ ₩ ₩ % ♡ < ½	■- ◊	?		
Language •	English					
Notification Configuration						_
🗄 Alert As 🔹	User Preference	Alert Level * Information				

8) Once the message is activated:

User 1 will receive an alert only through an Email.

FI	LE ADVANCED FIND	LIST TOOL EMAIL MESS	.S AGES			Microsoft	Dynami	ics 365						Andy Johnson 🕜	]
没 N Er	ew Edit Show nail Records	Book Delete Email	L Connect ↓ L Add to Queue ☆ Follow	* Unfollow Assign Email Messages Collaborate	<ul> <li>Share</li> <li>Copy a Link</li> <li>Email a Link</li> </ul>	Run Workflow Proce	Start Dialog	Run Report - Te	Excel mplates -	Word Templates - Data	Export Email Messages +	Export Selected Records			
	From	Subject				_		Regar	ding	Priority	/	Actual E	ind ↓		
	sam sam	You have a	new notification	related to A Datum PVT	LTD CRM:0017	073				Norma	d	10,	/6/2020		

The user will be directed to the record page by clicking on the record link available in the email body.

A Read-only This record's	status: Completed		
You have a new Email · Email ~	notification related to A Datum PVT LTD CRM:0017073		Normal          Received         Andy Johnson           Priority         Due         Status Reason         Owner
Email Related			
From	⊙ A sam sam	Attachment	See all records
То	⊙ A Andy Johnson	✓ File Name ↑ ∨	Followed ∨ File Size (B
Cc			
Bcc			No data available.
Subject	You have a new notification related to A Datum PVT LTD CRM:0017073	4	•
(i) This content	was not generated by Microsoft and may not be secure. The design seen by your recipients may not look like this preview, depending on their		
email service may be unsa	and device. Io contirm your email looks like this in all indoxes, use indox previews, external links in the preview aren't managed by Microsoft and ife. Open the full email (some images may not display).		
A Datum PVT LTI	D account alert notification.		
You have a new no	otification for record <u>A Datum PVT LTD</u> .		

In case of an announcement alert being sent through an email, there will be no such link since announcements are not record specific.

2	Read-only This record's status	Completed		
E	<b>You have a new not</b> mail · Email ∨ <b>:mail</b> Related	ification related to CRM:0017075		Normal          Received         Andy Johnson           Priority         Due         Status Reason         Owner
	From	⊙ A sam sam	Attachment	🖩 See all records
	То	⊙ A Andy Johnson	✓ File Name ↑ >	✓ Followed ✓ File Size (B
	Cc			
	Bcc			No data available.
	Subject	You have a new notification related to CRM:0017075	4	,
	<ul> <li>This content was email service and may be unsafe. O</li> <li>Announcement alert no</li> </ul>	not generated by Microsoft and may not be secure. The design seen by your recipients may not look like this preview, depending on their device. To confirm your email looks like this in all inboxes, use inbox previews. External links in the preview aren't managed by Microsoft and pen the full email (some images may not display).		

User 2 will get an alert only through Pop up.

P a g e 22 of 132





### Scenario 2:

Admin configures an alert as both **'User Preference'** and **'From Notification – Dialog'**. Let's say an admin does not have any specific preference to receive an alert.

#### Admin – No preference

But there are another two users having a preference to receive an alert in the following manner:

User 1 – Email Notification

User 2 – Pop up

Outcome:

Admin will be able to see an alert only as a 'Form Notification – Dialog'.

User 1 will receive an alert through an 'Email' as well as 'Form Notification – Dialog'.

User 2 will be able to see an alert as both 'Pop up' and 'Form Notification – Dialog'.

### Steps to set User Preference

1) Set individual user preferences for an alert.

#### Admin – No preference:

USER *				
sam sa	n <b>™</b> ≡			
0				
The information provide This user's information i	d in this form is viewable by the entire organization. managed by Office 365. To edit this information visit the	User Administration section of the C	Office 365 Portal.	
<ul> <li>Details</li> </ul>				
Alorts/Dupam				
- Alerts4Dynam				
Alert As				

User 1 – Email Notification:

User • Andy	Johnson ™≡
The information pro	ided in this form is viewable by the entire organization.
This user's informati	on is managed by Office 365. To edit this information visit the User Administration section of the Office 365 Portal.
► Details	

# User 2 – Pop up:

User • John	Shaw ™≡									
<ul> <li>The information prov</li> <li>This user's information</li> </ul>	ided in this form is viewable by the entire organization. In is managed by Office 365. To edit this information visit the User Administration section of the Office 365 Portal.									
► Details										
▲ Alerts4Dyna	▲ Alerts4Dynamics									
Alert As	Pop-Up									

2) Configure the alert message.

lert as user prefer essage	ence and form notification - dailog - Saved	Active Status
eneral Notification	Related $\vee$	
Message Rich Text	Enter text	
	\$         \$         \$         Font         •         Size         •         B         I         U <u>2</u> •         A         =         =         =	› <b>Ⅲ- ◎</b> ?
Language	English *	

3) Once the message is activated;

Admin will be able to see an alert only as a Form Dialog.

<b>EXAMPLE :</b> Dynamics 365	Sales Hub		Alerts4Dynamics	N N N N N N N N N N N N N N N N N N N
=	← 🖬 Save 🛱 Save & Close + New	စီ စ Open Org Ch	Search	Q×
<ul><li>☆ Home</li><li>③ Recent ∨</li></ul>	A Datum PVT LTD - Saved Account - Account ~		All 🚫 Critical 🔥 Warning	
🖈 Pinned 🗸 🗸	Summary Details Files Assets and Location	ns Related $\sim$	A Datum PVT LTD     less than a minute ano	×
My Work	ACCOUNT INFORMATION	Timeline	A Datum PVT LTD alert notification	
<ul><li>ℬ Sales accelerator</li><li>Ճ Activities</li></ul>	Account Name*	🔎 Search tir		
🗤 Dashboards	A Datum PVT LTD	🖉 Enter a no		
Customers	Phone			
Accounts				
A Contacts	Fax			
Sales	Website	Contractor		
& Leads		Capture and		
Opportunities	Parent Account			
S Sales				Dismiss All

User 1 will be notified through both Email as well as Form Dialog.

As Email Notification:

				LIST TOO	S					Microsoft	Dynar	nics 365
FILE	ADVAN	ICED FIN	ID	EMAIL MESS	AGES							
New Email	Edit	Show As +	-	Book Delete Email	400 C	ionnect 🧓 add to Queue iollow	★ Unfollow	Assign Email Messages	<ul> <li>◯ Share</li> <li>◯ Copy a Link</li> <li>∞ Email a Link</li> </ul>	Run Workflow	Start Dialog	Run Report •
		Records					Collabo	rate		Proce	ess	
	From     Subject								Re			
	sam sam You have a new notification related to A Datum PVT LTD CRM:0017074											

# As Form Dialog:

Dynamics 365	Sales Hub		Alerts4Dynamics			
=	← 🗗 🖬 Save 🛱 Save & Close + New	🖧 Open Org Ch	Search			Q ×
<ul><li>☆ Home</li><li>③ Recent ∨</li></ul>	A Datum PVT LTD - Saved Account - Account ~		All	🚫 Critical	🔥 Warning	() Information
🖈 Pinned 🗸 🗸	Summary Details Files Assets and Locatio	ons Related $\sim$	A Datum PVT LTD     lass than a minute a	<u>)</u>		×
My Work	ACCOUNT INFORMATION	Time	A Datum PVT LTD ale	ert notification		
🖉 Sales accelerator						
🖄 Activities	Account Name*	✓ Search tir				
비로 이ঁঁ Dashboards	A Datum PVT LTD	🖉 Enter a n				
Customers	Phone					
Accounts						
A Contacts	Fax					
Sales	Website					
🔇 Leads		Capture and				
Opportunities	Parent Account					
@						
S Sales						Dismiss All

User 2 will be able to see an alert both as Pop up and Form Dialog.

As Pop up:



### As Form Dialog:

<b>E Dynamics 365</b>	Sales Hub		Alerts4Dynamics			Ş	
=	← 🖬 Save 🛱 Save & Close + New	🖧 Open Org Ch	Search				Q X
<ul><li>ᢙ Home</li><li>④ Recent ∨</li></ul>	A Datum PVT LTD - Saved Account - Account ~		All	🚫 Critical	🔥 Warning	() Informati	ion
🖈 Pinned 🗸 🗸	Summary Details Files Assets and Locatio	ons Related $\vee$	A Datum PVT LTD     less than a minute ago				×
My Work	ACCOUNT INFORMATION	Timeline	A Datum PVT LTD alert n	otification			
Activities	Account Name*	,					
াই তাঁত Dashboards	A Datum PVT LTD	🖉 Enter a n					
Customers	Phone						
Accounts							
A Contacts	Fax						
Sales	 Website						
🔮 Leads		Capture and					
Opportunities	Parent Account						
S Sales							Dismiss All

Note: - User preference and Email notification cannot be used together.

ew Message						Active Status	New Status Re
eneral Notification							
Name	*	Alert					
Message Type	*	Simple					
Alert	*	Q. Rule based alert					
Process Start Date	*	10/6/2020					
Process End Date							
Notification Configu	ırati	on					
Notification Configu	urati	ON Fmail Notification 1 Iser Preference	Alert Level	*	Information		
Alert As	*						

### <u>Reason:</u>

User is required to create a workflow for alert as **'Email Notification'** where they will decide which of the users to be picked as an audience of this email notification. In addition to this, no separate notification is created for an alert as **'Email Notification'**, it would be sent directly as email.

# **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.

+ New 🛍 Delete 🔇	) Refresh  😵 Map 🛛 RE Look Up Add	ress 🖹 Activate Quote 🛛 Get Products 🗄	🚽 Process 🗸 🗛 Assign 🖻 Share 😶
Quote: Quote Interested	in 4G Enabled Tablets	△ Total Amount \$3,257,500.00	
A Quote ID QUO-01000-B0Q6R	Related - Common	TS	SALES INFORMATION
A Revision ID	O Audit History	3y: (no grouping) 🗸	I 4G Enabled Tablets
0 Name	Alerts	Prod $\nabla$ Pr $\nabla$ Pric $\nabla$	Potential Customer
Interested in 4G Ena	(값) Quote Line Analytics Breakdown	> Prosewa Not C \$199.00	
Currency	<ul> <li>Quote Line Detail</li> <li>Quote Project Price Lists</li> </ul>	Fabrika Not C \$169.00	DESCRIPTION
Price List	Playbooks	$\leftarrow$ Page 1 $\rightarrow$	

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

=	+ New 📋 Delete 🕐 Refresh 🕫 Look Up Address 🕑 Activate Quote 🍄 Get Products 🗄 Process 🗸 Assign 🖻 Share 🖙 Email a Link	
<ul><li>Accounts</li><li>へ Contacts</li></ul>	A Total Amount Interested in 4G Enabled Tablets \$3,257,500.00	$\sim$
Sales & Leads I Opportunities	Summary Details Alerts Related           + Add New Alert         Add Existing Alert         Refresh         Image: Run Report         Image: R	
R Competitors     Collateral	Alert Associated View Search for records	Q
Quotes	Active Alerts     ♀ Alert Type     ♀ Entity Configuration     ♀ Created On	7
<ul> <li>Orders</li> <li>Invoices</li> <li>Products</li> </ul>	Inactive Alerts	1
B Sales Literature		

**3.** On clicking **Add New Alert** button you are redirected to a new alerts page.

	Alerts4Dynamics – User Manual
≡	🔚 Save 🛱 Save & Close 🖉 Flow 🗸
Accounts	New Alert
A Contacts	
Sales	General
🌾 Leads	Name *
Upportunities	
ペ Competitors	Alert Type * Record Based
Collateral	Entity Configuration * 🔞 quote

 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.

Q Ale	Quote Expiring on 29th June Alert										
Ge	eneral Related										
	Name	*	Quote Expiring on 29th June								
	🖞 Alert Type	*	Record Based								
	Entity Configuration	*	🕅 quote								
	Messages			+	New Message						

# **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  $\rightarrow$  Alerts  $\rightarrow$  New and set the Alert Type as Rule Based. Select the Rule Mode as Simple or Advanced.

≡		$\leftarrow$	📑 🔚 Sa	ve 🛱	Sav	ve & Close	+ New	$O$ Click2Undo   $\vee$	🔊 Flow 🗸
ώ	Home	Nev	w Alert - U	nsaved					
Ŀ	Recent 🗸								
\$	Pinned 🗸	Gen	eral						
Ale	rts4Dynamics								
۵.	Alerts		Name		*				
Ø	Entity Configurations		Alert Type		*	Rule Based			
$\bigcirc$	Message Texts					Nule bused			
٥	Notifications		Entity Configu	uration	*				
F2	Alerts4Dynamics Logs		Rule Mode		*	Select			
\$	Configurations				l	Select		-20	
6	License Registration	Int	terval			Simple 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 the Entity Configuration.
- d) Rule Mode: Select Simple or Advanced based on your requirement. (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.

≡		← 🗗 🖥 Save 🕯	& Close + New	🖸 Click2Undo   🗸 🔊 Flow 🗸							
ഹ	Home	New Alert - Unsaved									
G	Recent 🗸			0.							
\$	Pinned 🗸	General									
Ale	rts4Dynamics										
Ļ,	Alerts	Name	heck Quote Expiry Date								
Ø	Entity Configurations	Alert Type	ule Based								
$\oplus$	Message Texts										
٦	Notifications	Entity Configuration	ী quote								
Ę	Alerts4Dynamics Logs	Rule Mode	imple								
4	Configurations										
0	License Registration	View	-Select								
			tive Quotes 🛛 🖑								
			y Connections								

#### b) Select the Interval:

=		←	ď	🔚 Save 📓	<sup>1</sup> Sa	ve & Close 🕂 New 🔿 Click2Undo   🗸 🔊 Flow 🗸						
ŵ	Home	Ne	New Alert - Unsaved									
Ŀ	Recent 🗸											
\$	Pinned 🗸	Ge	eneral									
Ale	rts4Dynamics											
Ģ	Alerts		Alert	Туре	*	Rule Based						
Ø	Entity Configurations		Entity	Configuration	*	🔞 quote						
	Message Texts											
٦	Notifications		Rule	Mode	*	Simple						
F)	Alerts4Dynamics Logs		View	,		Y Y						
٩	Configurations					Active Quotes						
6	License Registration					Select						
						X Hour(s)						
			nterval			X Day(s) X Week(s)						
			Poll I	nterval	*	X Month(s) Select // Interval						

• **Poll Interval:** This is the duration after which the system checks if any new record has been created based on the condition provided. (In above case, based on the condition of the selected view.)

The workflow can run:

- i. Only Once: The alerts for all the records in selected view are created Only Once.
- **ii. 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.
- **iii. 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.
- iv. 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.

- v. 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.

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 <u>Message</u> section.

=	$\leftarrow \square \square Save \square Save & Close + New \square Delete \bigcirc Refresh \bigcirc Check Access \land Assign \bigcirc Flow \lor \square$
<b>企</b> Home	Check Quote Expiry Date - Saved
🕒 Recent 🗸 🗸	Alert
🖈 Pinned 🗸 🗸	General Related $\vee$
Alerts4Dynamics	Kule Mode Simple
🗘 Alerts	View Activo Oustor
C Entity Configurations	Active Quotes
Message Texts	
Notifications	
局 Alerts4Dynamics Logs	Interval
Configurations	Poli Interval * X Hour(s) Interval * 2
License Registration	
	Messages + New Message

### **Advanced Alerts**

Alerts can be created based on conditions.

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

≡		← 🗗 🖬 Save & Close + New 🛍 Delete 🕐 Refresh 🔍 Check Access 🔍 Assign 🔊 Flo	w ~
ណ៍	Home	Invoice ≥ 1000 - Saved	
Ŀ	Recent 🗸	Alert	
Ŕ	Pinned 🗸	General Related $\vee$	
Ale	erts4Dynamics		
¢	Alerts	Name * Invoice ≥ 1000	
Ø	Entity Configurations	Alert Type * Rule Based	
$\bigcirc$	Message Texts		
٦	Notifications	🛆 Entity Configuration * 🔞 invoice	
Ę	Alerts4Dynamics Logs	Rule Mode * Advanced	
\$	Configurations	Each VMI	
0	License Registration	platform" mapping="logical" distinct="false"> <entity name="invoice"></entity>	

b) After creating the Alert, you can add a message to it. To know how to **Add New Message** skip to <u>Message</u> section.

=		←	С	🗟 Save	📓 Save & Close	+ New	🗊 Delete	🖔 Refresh	🖏 Check Access	A, Assign	$\boxtimes$ Flow $\ \smallsetminus$	:		🖻 Share
බ	Home	In	voice	≥ 1000	- Saved								-	· · · ·
Ŀ	Recent 🗸	Al	ert										¥	
s?	Pinned $\checkmark$	G	eneral	Related	~									
Aler	rts4Dynamics													
۵.	Alerts		Interval											
12	Entity Configurations		Poll I	Interval	X Day(s)				Interval	* 7				
$\oplus$	Message Texts													
٥	Notifications		Mossage	96							+ 0-New M	055200	() Pafrash	
F2	Alerts4Dynamics Logs		wessage	es							. Guidea la	essage	⊖ Kellesi	

### Announcement

Announcement is created at organization level. These alerts are not dependent 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  $\rightarrow$  Alerts  $\rightarrow$  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 <u>Message</u> section.

=		←	Ľ	🔚 Save	🛱 Save & Close	+ New	🗓 Delete	🕐 Refresh	🔍 Check Access	워, Assign	≫ Flow ∨			🖻 Share
ώ	Home	н	olida	<b>y</b> - Saved									A	
Ŀ	Recent $\checkmark$	Ale	ert										<b>W</b>	
\$	Pinned $\checkmark$	Ge	eneral	Related	~									
Aler	ts4Dynamics													
Ļ,	Alerts		Nam	e	* Holiday									
0	Entity Configurations		Alert	Type	* Announce	ment								
$\oplus$	Message Texts				, unounce									
٦	Notifications													
F)	Alerts4Dynamics Logs		Messag	es							+ New M	lessage	O Refresh	

# **Event Based Alerts**

Alerts4Dynamics gives user a provision to show an alert with respect to any event that happens in the CRM. For example, user wants an alert to be shown automatically once a new record is created within the selected entity. This can now be easily achieved using **'Event Based Alert'** feature of Alerts4Dynamics.

**Example 1:** Let's consider that the user wants an alert notification to be shown to all users in CRM once a new Account or Lead record is created. To achieve this, user has to follow the steps given below:

1) First and foremost, enable 'Account' entity through license registration. Users can enable any other entity from the available list for which they want to create an alert.

Lerts4Dynamics				
✓ ACTIVATE 🛛 SEND REQUEST				
CRM Version 9,1	User License	5		
<ul> <li>Notification</li> </ul>				
Notification Details (Notify User and Inogic about issues regarding licensing.)				
From	То			
Notify To Inogic	Notification Inter.	Once a day	Once a week	Once a month
License Registration using (*.lic) file				
Enable Entity Configuration				
Available Entities		Selected Entities		
Action Card Regarding Action Card Role Setting Address Al Builder Dataset File Appointment Article	>>	Account Case Invoice Lead Opportunity Quote		Î
Bookable Resource		Task		• •
2) Once entity is enabled, navigate to Advanced Settings  $\rightarrow$  Processes  $\rightarrow$  Create New process.

III Dynamics 365 🗸	Settings ~ Proces	ises >			7 + C Q	7 💿 🏾 🕐
Settings						
Business	Customization	System		Process Center	Application	Alerts4Dynami
Business Manageme	Customizations	administration	Email Configuration	Processes	My Apps	License Regi:
Templates	Solutions	Security	Activity Go to Processes to automate commo	o create or modify business pro	cess flows, scripts and dialogs for ha	ndling customer calls, workflows to
Product Catalog	Microsoft AppSource	Data Management	Activity Feeds Rules			🚨 Alerts >>
Service Management	←■ Plug-In Trace Log	System Jobs	Dynamics 365 App f			Alerts4Dynar
Mobile Offline	Solutions History	Document Manage	Sales Insights			
¢¦⇔ Sync Error		Auditing				

- 3) Fill the following details and click on **OK**.
  - Enter a relevant name for the process
  - Select the category as 'Workflow' and Entity as 'Account'.

Create Process Define a new proces flows, actions, dialog	s, or create one from an existing template. gs, and workflows.	You can create fou	r kinds of processes: bus	iness process
Process name: *	on creation of new record			
Category: *	Workflow 🗸	Entity: *	Account	~
🗹 Run this workflo	ow in the background (recommended)			
We recommend usir	ng Microsoft Flow instead of background w	orkflows. <u>Click here</u>	to start building Flows!	
Type:	New blank process New process from an existing templa	ate (select from list)	):	
Templat	e Name ↑	Primary	Entity	Ow
•				•
Properties				
			ОК	Cancel

4) Select the event on which you want the notification to created :

We are selecting '**Record is created**' checkbox since we want an alert to be displayed for the record that is newly created in the system.

4 Common	General Administration Notes	
Common     Common     Common     Audit History     Solution Health Rules     Solution Health Rules     Solution Health Rules     Workflow Triggers     Messages     Messages     Process Sessions     Process Sessions	Hide Process Properties  Process Name * Activate As Process Available to Run Run this workflow in the background (recommended) As an on-demand process As a child process Workflow Job Retention      Automatically delete completed workflow jobs (to save disk space)	Entity Account Category Workflow ··· Options for Automatic Processes Scope Organization · Start when: Record is created Record is created Record fields changes Record fields change Select Record is deleted

5) For creating notification you need to create a record of **'Notification Request'** entity which is custom entity shipped along with the solution.

Please follow the below steps for creating notification request entity record. Select Add Step  $\rightarrow$  Create Record  $\rightarrow$  Select 'Notification Request' from the dropdown.

4 Common	General Administration Notes			
Information	Available to Run	Options for A	utomatic Processes	
Audit History	Run this workflow in the background (recommended)	Scope	Organization	~
🍓 Solution Health Rules	As an on-demand process	Start when:	Record is created	
🍙 Solution Health Rules	As a child process		Record status changes	
R Workflow Triggers	Workflow Job Retention		Record is assigned	
Messages	Automatically delete completed workflow jobs (to save disk space)		Record fields change Select	
≥6 Messages				
Process Sessions     Process Sessions	Add Step - arensert - X Delete this step.			
	Parallel Wait Branch Create Record Update Record			
	Assign Record			
	Send Email			
	Start Child Workflow			
	Perform Action			
	Change Status			
	Stop Workflow			
Status: Draft	IoT 🕨			

6) Click on **'Set Properties'**. Here, you will find similar fields necessary for configuration as we do in other types of alerts.

Common     Common     Audit History     Solution Health Rules     Solution Health Rules     Workflow Triggers     Workflow Triggers     Messages     Messages     Messages     Messages	General     Administration     Notes       Available to Run	Options for A Scope Start when:	Utomatic Processes Organization  Created Record is created Record status changes Record is assigned Record fields change Select Record is deleted
Process Sessions     Process Sessions	Add Step ▼ ☐ Hansert ▼ X Delete this step.      Type a step description here.      Create: Notification Request ▼ Set Properties		

- 7) Fill in the following details:
  - Name Enter some valid name for the Notification Request record.
  - Message text Enter some valid text (You can also select dynamic value).

Operator:	
Set to	~
Look for:	
Account	~
Account Name	~
Add	
	*
	-
Default value:	
ОК	

Select the above field and click on 'Add' button to add it in the Message Text field. Click Ok. You will see the dynamic value is set to the 'Message Text' field. Similarly add Dynamic values in 'Name' field.

				Г	
		Operator:			
		Set to	~		
		Look for:			
		Account	~		
		Account Name	~		
		Add			
		×			
		× = +			
		Account Name(Accou	nt) 🔶		
			-		
		Default value:		1	
				1	
		С			
File Save and C	lose	С			
File Save and C Process: on creater Create Notification Settin	ation of new record fication Request gs	С			
File Save and C Process: on creater Create Notification Settin Notification Settin	lose ation of new record <b>fication Request</b> gs	count)) (Created On(Account))			
File Save and C Process: on creat Create Notification Settin Notification Settin Name *	ilose ation of new record <b>fication Request</b> gs (Account Name(Acc (Account Name(Acc	count)) (Created On(Account)) count)) is newly created			
File Save and C Process: on cree Create Notification Settin Notification Settin lame * Message Text Message Rich Text	ilose ation of new record <b>fication Request</b> gs (Account Name(Acc (Account Name(Acc	count)) (Created On(Account)) count)) is newly created			
File Save and C Process: on create Create Notification Settin lame * Message Text Message Rich Text Message Rich Text Message Rich Text Message Rich Text	ation of new record <b>fication Request</b> gs (Account Name(Account Nam	count)) (Created On(Account)) count)] is newly created			
File Save and C Process: on creating Create Notification Setting Notification Setting Notification Setting Notification Setting Nessage Text Alessage Rich Text Alert As op-Up	ilose ation of new record <b>fication Request</b> gs (Account Name(Acc (Account Name(Acc (Account Name(Acc (Account Name)) (Account Name) (Account	count)) (Created On(Account)) count)) is newly created	Email Notification	○ No ○ Yes	
File Save and C Process: on cree Create Notification Settin Notification Settin Name * Message Text Message Rich Text Mert As Yop-Up orm Notification Vientav As	lose ation of new record fication Request gs (Account Name(Acc (Account Name(Account Name(Acc (Account	counti) (Created On(Accounti)) counti) is newly created	Email Notification	○ No ○ Yes ○ No ○ Yes ○ No ○ Yes	
File Save and C Process: on creat Create Notification Settin Notification Settin Nessage Text Message Rich Text Message R	Iose ation of new record fication Request gs [(Account Name(Acc [(Account Name(Account Name(Acc [(Account Name(Acc [(Account Name(Acc [(Account Na	count)) (Created On(Account)) count)] is newly created	Email Notification Is Dismissible User Preference	○ No ○ Yes ○ No ○ Yes ○ No ○ Yes ○ No ○ Yes	
File Save and C Process: on creater Create Notification Settin Notification Settin Name * Message Text Message Rich Text	ilose ation of new record <b>fication Request</b> Igs (Account Name(Acc (Account Name(Acc No Yes No Yes	count)) (Created On(Account)) count)) is newly created	Email Notification Is Dismissible User Preference	<ul> <li>No ○ Yes</li> <li>No ○ Yes</li> <li>No ○ Yes</li> <li>No ○ Yes</li> </ul>	

9) **Message Rich Text** - Select the appropriate Message Text from the lookup. For Message Text to appear in the lookup users need to create Message Text.

To create and add **Message Text** in the **Message Rich Text** field for an **Event-Based Alert** follow the steps given below:

• Navigate to Alerts4Dynamics App --> Message Texts --> Click on the 'New' Button.

	Dynamics 365	Alerts4Dynamics $P$ Q + $\nabla$ @ ? Q G
=		중 Show Chart + New      Delete      ·      C Refresh      Sefresh      Visualize this view      Sefresh      Link      ·      Sefresh     Sef
ଜ	Home	Message Text - Event Based Notification $\checkmark$ III Edit columns $\forall$ Edit filters Filter by keyword
Ŀ	Recent 🗸	
\$	Pinned 🗸	Name ↑ ×     Created On ×
Ale	rts4Dynamics	Here Ressard Dealers Message K3DB/DDI SY8 MA
¢,	Alerts	
Ø	Entity Configurations	
$\oplus$	Message Texts	
٦	Notifications	
F.	Alerts4Dynamics Logs	
0	Configurations	
0	License Registration	

- Fill in the following details:
  - **Name -** Provide an appropriate name for the Message Rich Text.
  - **Message Rich Text -** Enter some valid text and do the desired text formatting to create Message Rich Text that will be shown on the notification.
- Click on 'Save'.

	Dynamics 365	lerts4Dynamics	Q	Q	+	V	٢	?	员 (
		← 🖬 Save 🖉 Save & Close + New 🛍 Delete 🖒 Refresh 🔍 Check Access 🔊 Flow ∨	÷					🖻 Sha	re 🗸
ណ	Home	New Account Creation Message - Saved				-	-		w
Ŀ	Recent $\checkmark$	Message Texts					-	1	
\$	Pinned $\checkmark$	General Related $\vee$							
Ale	rts4Dynamics								
Ļ,	Alerts	Name * New Account Creation Message							
10	Entity Configurations	Message Rich Text *							
	Message Texts	Alert! A New Account has been created.							
٥	Notifications	Websche link.							
E.	Alerts4Dynamics Logs								
٩	Configurations								
0	License Registration	$\smile$							
		Segoe UI ▼ 9 ▼ B I U ∠ ▼ A ▼ ≡ ⊨ → ± » ≡ Ξ	≡ 0	છે ે	abe 💽	P		н. — — — — — — — — — — — — — — — — — — —	

• Once Message Text is created it will appear in the Message Rich Text look up. From here you can select the Message Text to add in the Event-Based Alert.

Save and	Close			
File				
Process: on cre	eation of new record			
← Create Not	ification Request			
Notification Setting	ngs			
Name *	{Account Name(Account)} {Created O	n(Account)}		
Message Text	{Account Name(Account)} is newly c	reated		
Message Rich Text	I New Account Creation Me	ssage		
Alert As				
Pop-Up	○ No ○ Yes	Email Notification	○ No ○ Yes	
Form Notification	◯ No ◯ Yes	Is Dismissible	◯ No ◯ Yes	
Display As		✓ User Preference	◯ No ◯ Yes	
Alert Level *				
Display Until				

#### Note:

- If both Message Text and Message Rich Text fields are filled, then preference will be given to Message Rich Text when displaying the notification.
- Message Rich Text cannot be displayed as a bar in a form notification.
- Message Rich Text gives users provisions to create more interactive messages by doing all kinds of text formatting, adding links and images, etc., to make their messages more descriptive and engaging.

10) Fill in the following details:

- Alert as Select only Pop-Up as 'Yes' and leave rest all blank
- Alert level Warning/Critical/Informational depending on user's requirement
- For Notification Associated With Field You will have to select a dynamic record URL of the entity on which you want to show the notification. In this scenario, we want a notification to be shown on the Account entity, so we will select the Record URL of the Account entity.

11) Click on 'Add'.

File Save and Cl	ose				(
Process: on crea	tion of new record				
← Create Notif	ication Request				
A Notification Setting	JS			A	Form Assistant
Name *	{Account Name(Account)} {Created On(Account	3			Dynamic Values
Message Text	{Account Name(Account)} is newly created				Dynamic Values
Message Rich Text	Wew Account Creation Message				Operator:
Alert As					Set to
Pop-Up	No Yes	Email Notification	○ No ○ Yes		Account
Form Notification	No. Yes	Is Dismissible	O No. O Yes		Record URL(Dynamic)
Display As		V Liser Preference			Add
bispility //s					X   • • · · ·
Alert Level *	Information			~	Record URL(Dynamic)(Account
Display Until					

12) For the 'Notification Audiences' you can select dynamic users like Owning User of the record as well as the Manager of the Owning User as shown in Include Users field.

<ul> <li>Audience Settings</li> <li>Notification Audiences</li> </ul>	3			
Include Users	(Owning User(Account)) {Manager(Owning User (User))}	Exclude Users	Lohn Watson	Q
Team	{Owning Team(Account)}			

13) Once details are filled, click on 'Save and Close' and then activate the workflow by clicking 'Activate' button.

File	표 🛛 🖗 🖸 Activate 📰 Convert to a real-time workflow 🛛 🛱 Show Dependencies 🛛 🗧 Solution Layers 🌾 Actions 🗸	
Process: Account_Alert_W	orkflow	Working on solution: Defaul
We recommend using Microsoft Flow	instead of background workflows. <u>Click here</u> to start building Flows!	
Common     Information     Audit History     Audit History     Solution Health Rules     Solution Health Rules     Workflow Triggers     Worksages     Worksages     Messages     Messages     Process Sessions     Im Drocess Sessions	General       Administration       Notes         Available to Run       Options for Automatic Processes         Run this workflow in the background (recommended)       Scope       Organization          A sa nol-demand process       Start when:       2 Record is created          As a child process       Record is datus changes        Record is assigned         Workflow Job Retention       Record lis deleted       Record is deleted	
	Add Step	

In this way, you can create an event based alert to be shown once a new record is created on the selected entity.

**Example 2:** Now, let us see how to configure the Event-based alert for the scenarios where the entity on which the notification to be shown is different from the entity where the workflow is triggered and also

if you want the notification audience and email audience to be the related records which are in **'One to Many'** or **'Many to Many**' relationships. For **'Many to One'** relationships we can define the audience by using the default form assistant available in OOB workflows.

Let's consider the below scenario:

There is an invoice with a related account which has further multiple associated contacts and user wants to show the notification as well as send an email to these contacts once the invoice is paid. For this, we will configure the workflow as shown below:

1) Navigate to Advanced Settings  $\rightarrow$  Processes  $\rightarrow$  New Process  $\rightarrow$  Fill the fields  $\rightarrow$  Click on OK.

D	ynamics 365 🔍	Se	ettings ~	Processes	\$						Q	3	+
ttin	gs												
sir	ายรร	Cust	omization		Syste	em			Proces	ss Center	Ap	plicati	on
	Business Management	·H·	Customizations	5	20	Administration	<b>∑</b> ₀	Email Configuration	D P	rocesses		) My A	Apps
	Templates	+	Solutions		A	Security	<b>.</b>	Activity Feeds Config		Aid Go to Processes to handling custom	o create or i er calls, woi	modify bu rkflows to	usiness p automa
	Product Catalog	$\triangleright$	Microsoft Apps	Source	۳	Data Management		Activity Feeds Rules		a series of comma	ands.		
	Service Management	€∎	Plug-In Trace L	og		System Jobs		Dynamics 365 App f					
2	Mobile Offline	$\odot$	Solutions Histo	iry	D,	Document Manage	Ŷ	Sales Insights					
Þ	Sync Error					Auditing							

Create Process Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.								
Process name: *       Invoice alert         Category: *       Workflow         ✓       Run this workflow in the background (recommended)	Entity: *	>						
We recommend using <u>Microsoft Flow</u> instead of backgrou	und workflows. <u>Click here</u> to start building Flows!	4						
Type:  New blank process New process from an existing ter	nplate (select from list):	C						
Template Name ↑	Primary Entity Ow							
<		>						
Properties								
Action	OK Cancel	~						

2) Since we want to trigger an alert on status change event of an invoice (i. e. when invoice is paid), we will enable the **'Record status changes'** checkbox.

e 🛃 🛃 Save and Close	🕮 🛛 🗍 🖉 Activ	ate 🔰 Convert to a real-time wo	rkflow 🛛 📲 Show Dep	endencie	es 🛛 🖥 Soluti	ion Layers 🛛 📩 <u>A</u> ctions 🕶	
Process: Invoice alert							Working on solutio
e recommend using Microsoft F	low instead of background	workflows. <u>Click here</u> to start buildin	g Flows!				
ommon	General Administrat	ion Notes					
<ul> <li>Information</li> <li>Audit History</li> <li>Solution Health Rules</li> <li>Solution Health Rules</li> <li>Entities</li> <li>Workflow Triggers</li> <li>Messages</li> <li>Messages</li> <li>Messages</li> <li>Messages</li> <li>Messages</li> <li>Process Sessions</li> <li>Process Sessions</li> </ul>	Hide Process Prope Process Name * Activate As Available to Run Run this workfli As an on-demar As a child proce Workflow Job Rete Automatically do	rties Invoice alert Process w in the background (recommended d process ss ntion elete completed workflow jobs (to sav	) e disk space)	ß	Entity Category <b>Options for Au</b> Scope Start when:	Invoice Workflow tomatic Processes Organization Record is created Record status changes Record sassigned Record fields change Sel Record is deleted	⊂ v

3) Now, add a step and check the condition if the invoice is paid.

Alerts4D	ynamics –	User	Manual
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Process: Invoice alert		Working or							
We recommend using Microsoft Flo	Ve recommend using Microsoft Flow instead of background workflows. Click here to start building Flows!								
Common ➡ Information ➡ Audit History ➡ Solution Health Rules ➡ Solution Health Rules ➡ Entities	General Administration Notes Workflow Job Retention Automatically delete completed workflow jobs (to save disk space)	Record status changes     Record is assigned     Record fields change Select     Record is deleted							
<ul> <li>Entities</li> <li>Workflow Triggers</li> <li>Messages</li> <li>Messages</li> <li>Messages</li> <li>Messages</li> <li>Process Sessions</li> <li>Process Sessions</li> </ul>	Add Step - Bellnsert - Delete this step.								

4) Here, we will check the condition whether the invoice status has been paid, you can similarly define any condition.

File Save and Close	🖺 🛛 🕼 🕇 😋 Activate 🔹 Convert to a real-time workflow 🔤 🖏 Show Dependencies	Solution Layers 🔥 Actions 🗸	
Process: Invoice alert			Working
We recommend using <u>Microsoft Fl</u>	ow instead of background workflows. <u>Click here</u> to start building Flows!		
Common ↓ Information ↓ Audit History ↓ Solution Health Rules ↓ Entities ↓ Entities ↓ Workflow Triggers ↓ Workflow Triggers ↓ Workflow Triggers ↓ Messages ↓ Messages ↓ Messages ↓ Process Sessions ↓ Process Sessions	General       Administration       Notes         Workflow Job Retention	<ul> <li>✓ Record status changes</li> <li>☐ Record is assigned</li> <li>☐ Record fields change</li> <li>☐ Record is deleted</li> </ul>	Select

5) Now click on 'Save and Close'.

F	ile		🛃 Save and	I Close				
_								
1		Cle	ar 🔤 💽 Gro	up AND	Group OR			
		¥	Invoice		<u>Status</u>	<u>Equals</u>	<u>Paid</u>	
			Select					

6) Add another step under the above added step and select 'Create Record'.



7) Select 'Notification Request' for record creation and click on 'Set Properties'.

ile 🛃 🕞 Save and Close	🗈   🕖   🗿 Activate   📰 Convert to a real-time workflow   🕰 Show Dependencies   🚍 S
Process: Invoice alert	
ve recommend using <u>Microsoft Flo</u>	w instead of background workflows. <u>Click here</u> to start building Flows!
Common Common Audit History Solution Health Rules Solution Health Rules Entities	General       Administration       Notes         Workflow Job Retention
<ul> <li>Entities</li> <li>Workflow Triggers</li> <li>Messages</li> <li>Messages</li> <li>Messages</li> <li>Messages</li> <li>Process Sessions</li> <li>Process Sessions</li> </ul>	<ul> <li>Add Step ▼ ☐ Hinsert ▼ X Delete this step.</li> <li>▼ Type a step description here.</li> <li>If Invoice:Status equals [Paid], then:</li> <li>③ ● Type a step description here.</li> <li>Create: Notification Request ∨ Set Properties</li> </ul>

- 8) Fill the following fields:
  - Name Enter some valid name for the message.

• **Message Text** – Enter a text for the message that you would like to display on the alert notification. Let's say, we would like to show the invoice name in the message. For this we'll select a dynamic field from the list.

<b></b>	•			
ettings				<ul> <li>Form Assistant</li> </ul>
_				Dynamic Values
	Alert for invoice paid			Dynamic Values
			×	Operator:
				Set to
			×	Look for:
			<b>v</b>	Invoice
ciated With				Name
				Import Sequence Number
tings				Invoice
udiences				Invoice Date
				Invoice Discount (%)
	<u>a</u>	Exclude Users		Invoice Discount Amount
				Invoice Discount Amount (Base)
	*			Invoice ID
				Last On Hold Time
de Users	) Yes 🔿 No			Last SLA applied
		То		Last Submitted to Back Office
				Modified By
	<u>a</u>	BCC	Q	Modified By (Delegate)
10.00				Modified On
ra settings				Name
ference				On Hold Time (Minutes)
cation Audi	ences			Opportunity

• Click on 'Add' and 'OK'.

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-

• **Message Rich Text** – Select the appropriate Message Text from the lookup. To know more about Message Rich Text, skip to <u>Message Rich Text</u> section.

Note:

- If both Message Text and Message Rich Text fields are filled, then preference will be given to Message Rich Text when displaying the notification.
- Message Rich Text cannot be displayed as a bar in a form notification.
- To add Message Rich Text in Event-Based Alerts you need to create messages text before creating the workflow using "Message Texts" of Alerts4Dynamics App.
- 9) Next, fill the following fields:
  - Alert As Since we want to send an alert through an email, we will select it as 'Email notification'.
  - Alert level Let's say it is just a normal informational alert, we will select it as 'Information'.
- 10) Populate the field 'Notification Associated with' field. Since this alert is associated with 'Invoice' but we want a notification to be shown on the related Account, we will select the Record URL of the Account entity and not of the Invoice.

a .							
Operator:							
Set to							
Look for:							
Customer (Account)							
Record URL(Dynamic)	~						
Add							
X   🖀 🐺							
Record URL(Dynamic)(Customer (Ac							
	Ŧ						
Default value:	_						
ОК							

This will set the field with value as shown below:

File Save and Cl	lose			
Create Notif	e alert fication Request			
<ul> <li>Notification Setting</li> </ul>	gs			
Name *	Alert for invoice paid			
Message Text	{Name(Invoice)} has been paid			
Message Rich Text				
Alert As				
rue tra				
Pop-Up	🔿 No 💿 Yes	Email Notification	🔿 No 🌔 Yes	
Pop-Up Form Notification	<ul> <li>No ● Yes</li> <li>No ● Yes</li> </ul>	Email Notification Is Dismissible	○ No ● Yes ○ No ○ Yes	
Pop-Up Form Notification Display As	No (e) Yes No (e) Yes Dailog	Email Notification Is Dismissible User Preference	○ No ● Yes ○ No ○ Yes ○ No ○ Yes	
Pop-Up Form Notification Display As Alert Level *	No (e) Yes No (e) Yes Dailog	Email Notification Is Dismissible User Preference	<ul> <li>No</li> <li>Yes</li> <li>No</li> <li>Yes</li> <li>No</li> <li>Yes</li> </ul>	~

- 11) Now we will define the email recipient and select the user from whom you would like to send an email notification. Click on the below look-up field. In this scenario we will set the Notification Audience section blank. Hence, the notification will be displayed to all the users in the CRM.
- 12) Select the user that you would like to send an email notification from and click on 'Add'.

Lookup Record	×
Enter your search criteria.	
Look for User	
Look in User Lookup View	
Search Search for records	
Full Name 🛧	osition ا ا
Microsoft Forms Pro	
Mike James	88784
Power Apps Checker Application	
Power Platform Dataflows Common Dataflows	ata Servic
٢	>
1 - 4 of 4 (1 selected)	🖌 🖣 Page 1 🕨
<u>N</u> ew Add	Cancel Remove Value

13) Select the 'to' recipient and click on 'Add'.

LOOK U	Jp Records search criteria.			×	
Look for Look in Search	Account Account Lookup View Search for records	Sh	ow Only My Re	cords	
□   Ac	ccount Name	$\square$	Email	Ö	
Te	esco		ameydeo@	⊚ymail.cor	
te	st_5e09f2e6-1b93-48c9-a7	95-d8e387ef56b5	;		
A.	Datum		vlauriant@	adatum.co	
<				· · · · · · · · · · · · · · · · · · ·	
1 - 50 c	of 90 (1 selected)		A Page	e 1 🕨	
	Selected records:				
Select Remove	Selected records:				
Select Remove	Selected records:		Add	<u>C</u> ancel	
Select Remove <u>N</u> ew	Selected records:		Add	<u>C</u> ancel	
Select Remove	Selected records:		Add	<u>C</u> ancel	
Select Remove	Selected records:		Add Exclude Users	Cancel	
Select Remove	Selected records:		Add Exclude Users	<u>C</u> ancel	
Select Remove	Selected records:		Add Exclude Users	<u>C</u> ancel	

14) Here, we want to send the email notification to all the contacts that are associated with 'Account', so we will select the primary entity as 'Account' and select 'Record URL (Dynamic)' from the list. Similarly, we can select any related entity as shown in the below image.

	orm Assistant	
C	Dynamic Values	
Dy	namic Values	
0	perator:	
5	Set to	$\sim$
Lo	ook for:	
(	Customer (Account)	$\checkmark$
F	Record URL(Dynamic)	$\checkmark$
	Add	
	× : .	
· · ·		
F	Record URL(Dynamic)(Custome	er (A
		×
D	efault value:	
] L		
	OK	
	UK	
Pro Pro	ocess: Invoice alert	
<del>ک</del> Cr	eate Notification Requ	lest
From	🚨 Mike la	mes To
сс		D BCC
A Related	d Record Settings	

- 15) Next step is to define the related recipients for receiving the email notification. For this, you will have to enter a logical name of 1: N relationship that account holds with contact. Navigate to Advanced Settings → Customizations → Customize the system.
- 16) Look for Account entity  $\rightarrow$  1: N relationship.

Solution: Default	Solutior on
Solution Default Solution	
Components	^
Account	hŋ
Charts	Account
₩ Keys	nsh
N:1 Relatio	onsh

## 17) Look for the below relationship and open it.

	Schema Name	Primary Entity	Related Entity ↑	Type of Behavior
	incident_customer_acc	Account	Case	Parentai
	account_IncidentResol	Account	Case Resolution	Parental
	account_connections1	Account	Connection	System
	account_connections2	Account	Connection	System
	contact_customer_acc	Account	Contact	Parental
	contract_billingcustom	Account	Account	Referential, Restrict

## 18) Copy the name of the relationship.

Relationship Account to Conta	oct	w	orking on solution
Common a Information a Mappings	General Relationship Definition Primary Entity *	Account V Related Entity*	Contact
	Name *	contact_customer_accounts	
	Searchable	Yes	
	Hierarchical	No	

19) Now, navigate back to properties page and paste the name of this relationship into the below field. Similarly, if you want the audience to be of type more than one relationship then you can define multiple relationship as comma separated.

Create Notific	ert ation Request	
From	🕹 Mike James	То
сс		BCC
Related Record Settin	gs	
Primary Record Reference	{Record URL(Dynamic)(Customer (Account))}	
Related Notification A	udiences	
Include Users Relations		Exclu
Related Email Recipier	its	
To Relations	contact_customer_accounts	
CC Relations		BCC F
Email Content		

20) Enter a valid subject and relevant message for an email.

Create Notifica	ation Request
Related Email Recipien	ts
To Relations	contact_customer_accounts
CC Relations	
Email Content	
Subject <sup>+</sup>	Invoice paid
Hi, We confirm that the invoice Regards, Mike	is paid

21) Once this is done, click on 'Save and Close'.

File	🛃 Save and Close
	Save and Close
	Process: Invoice alert
4	Create Notification Request
Noti	fication Settings

22) Next, click on 'Save' and the activate the workflow.

Save and Clos	e 🖹 🛛 🕼 Convert to a real-time workflow 🛛 🛱 Show Dependencies 🛛 🚆	Solution Layers
Broc Save		
S. mormation		
commend using <u>Microsoft I</u>	Flow instead of background workflows. Click here to start building Flows!	
imon	General Administration Notes	_
Information		Reco
Audit History	Workflow Job Retention	Reco
Solution Health Rules	Automatically delete completed workflow jobs (to save disk space)	Reco
Solution Health Rules		Reco
Entities		_
Entities		
Workflow Triggers	Add Step - Gransert - X Delete this step.	
Messages	• Type a step description here.	
Messages		
Messages	ir invoice:Status equais (Paid), then:	
ers Sersions	Type a step description here.	
Process Sessions	Create: Notification Request V Set Properties	
FIOCESS 365510115		

### 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.

ave Save	🛱 Save & Close	🗓 Delete	🖔 Refresh	🖄 Share	🖾 Email a Link	₀⁄ª Flow ∨	🖷 Word Templates 🛛 🗸	💷 Run Report	$\sim$
Holida	ay								
Alert	•								
Genera	I Related								
	-								
Na	ame	* Holiday							

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

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

← 🖾 🔚 Save 🛱 Sa	we & Close → New 🕤 Click2Undo   ∨ 🔊 Flow ∨				
New Message - Unsaver	d	Active Status	New Status Reason	0	$\sim$
General Notification					
Name *					
Alert *	🗘 Holiday				
Process Start Date *					
Notification Message					
Message Text	***				
Message Rich Text	Enter text				
		∎- ⊘	?		
Language *	Select *				

Enter the value in fields:

- i. Name: This is the name of the message you are trying to create.
- **ii.** Alert: This is the Alert for which you are creating the message.
- iii. Message Text: Enter the message you would like to display in the notification or send to the users as email. Users can also pass dynamic values here for e.g. Account {name} has been created, where {name} stands for Account's name.
- iv. Message Rich Text: Enter the message you would like to display in the notification. Here users get the provision to create more interactive messages by doing all kinds of text formatting, adding links and images, etc., to make their messages more descriptive and engaging. To know more about Message Rich Text, skip to <u>Message Rich Text</u> section.

### Note:

- If both Message Text and Message Rich Text fields are filled, then preference will be given to Message Rich Text when displaying the notification.
- Message Rich Text cannot be displayed as a bar in a form notification.
- v. Alert Level: This can be categorized as Information, Warning and Critical. This determines the severity level of the Alert you are trying to create.
- vi. Alert As: This is the mode of notifying your users. It can be done as:
  - a. **Pop-Up:** The notification with message will pop-up post clicking the global notification bell button
  - b. Form Notification: Choosing an alert as "Form Notification" will show up the 'Display As' field. Under this field, you can select either 'Dialog' or 'Bar'. If you select 'Dialog' then alert will be shown as a dialog sliding out from the right of the screen immediately after opening the record and if you choose 'Bar' then the notification will be displayed under the ribbon in the form of a bar.
  - c. Email Notification: The message will be sent to the users through email.
  - d. User Preference: Gives a provision to set the preference to receive an alert
- vii. Is Dismissible: Gives provision to configure the alert as either dismissible or non dismissible. If 'Yes' is selected, alert becomes dismissible and if 'No' is selected then alerts cannot be dismissed. (Note: Is applicable to all type of alerts).
- viii. Auto Dismissible: Gives provision to configure the alerts as auto-dismissible/non autodismissible. If 'Yes' is selected then alerts will be automatically dismissed once the defined condition is no more satisfied. If 'No' is selected then alerts cannot be dismissed automatically even if it moves out of the defined condition in the alert configuration. (Note: Is applicable to Rule-based and Event-based alerts only).
- ix. Email Workflow: If the 'Email Notification' is selected in 'Alert As' field then the user needs to create an OOB workflow for sending an email. We can send email notification to not only the CRM users but also the customers as well.



Hide Process Properties  Process Name * Alert on invoice paid  Activate As Process Valiable to Run Run this workflow in the background (recommended) As an on-demand process As a child process Workflow Job Retention Automatically delete completed workflow jobs (to save disk space)	Entity Category <b>Options for A</b> Scope Start when:	Invoice Workflow Workflow Organization Record is created Record status changes Record fields change Record fields change Record fields change Record is deleted
--	--	---

Process: Send Ema Send Email	il Notification	
From	🔮 John Watson	
То	(Owning User(Record (Account)))	
Cc		Q
Bcc		Q
Subject	Account Overdue	
Х 🖻 🛍 🖪 /	u   副 副 副 語 語   譯 譯 🏚 A 🗸 A V 📓 Insert Article 🧕 Insert Hyperlink	
Hi {Owning User(R	ecord (Account))},	
Please look into this	Account which has been overdue.	
Thanks,		
John		

Alert on Invoice P	aid - Saved	6	Active Status	na anti-
General Notification	Related $ \smallsetminus $			
Message Type	* Simple			
Alert	* 🔉 Alert on Invoice paid			
Process Start Date	* 5/23/2023			Ē
Process End Date				
Notification Configurat	ion			
Alert As	* Email Notification	Alert Level	* Information	
		Email Workflow	* 🖾 Alert on invoice paid	

- x. 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.
- xi. 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.
- **xii. Display Until:** It defines for how much period the notification should be displayed. If user hasn't dismissed the notification.
- xiii. Language: Alert messages can be created in multiple languages.

Note: Languages need to be enabled for creating messages in multiple languages. If the created Notification Message (language) is in English then the notification will be displayed only for users whose User Interface language is English.

Notification Message	
Message Text	
Message Rich Text	Enter text
	భ Segoe UI • 9 • B I U ∠- ద- ≡ ⊨ ∞ ∞ ఐ ఔ Ξ Ξ లం ం ∞ ఱ ⋈ 94 ం ఁ ఓ ⊞- తి ?
languago *	
Language	English

- xiv. Include Users: If you specify the set of users here, alerts will be shown to only these users.
- **xv. Exclude Users:** If you specify the set of users here, alerts will be shown to every user in organization except for these users.
- xvi. Security Roles: If you select security roles here, alerts will be shown to these security roles.
- **xvii. Teams:** If you select Teams here, alerts will be shown to these teams.

#### 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.

These fields allow you to select your viewing audience for alert message. Dynamics values as well as static values can be selected in these fields.

For example, in below image we can see in **Include Users** field **Owning User** and **Owning User Manager** are selected which are dynamic values and in **Exclude Users** field **'Scott Hamells'** (CRM User) is selected.

	Aler (S4D)				
Notification Audience					
Include Users	x Owning User X Owning User.Manager	*	Exclude Users	× Scott Hamells	4
Security Roles	× Salesperson	*	Teams	× Sales Team	

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

🖫 s	ave	🛱 Save & Clos	e	⊘ Activate	📋 Delete	🖔 Refresh	🖻 Share	🕼 Email a Link	$_{\rm D}\!/^{\rm a}$ Flow $~\vee$	屆 Word	l Templates	~ f	🖞 Run Report	$\sim$		
(!) C	lick Act	ivate to publish this	mes	sage. Once publis	shed, it'll start ge	nerating notificat	ions from the P	rocess Start Date.								
Ho Me	olida <sub>ssage</sub>	y on 30th Ju	ıly										Active Status	<b>Draft</b> Status Reason	Sam Kumar Owner	$\sim$
Ge	neral	Notification	F	Related												
	Nan	1e	*	Holiday on 3	30th July											
	Aler	t	*	🗘 Holiday												
	Pro	ess Start Date	*	6/4/2020												]
٢	Votifi	ation Messag	e													
_	Mes	sage Text	*	Holiday on 3	30th July due t	o elections		L	anguage *	[	English				v	

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

🖬 Sav	re 🔛 Save & C	lose	🖻 Draft	🗓 Delete	🖔 Refresh	🖄 Share	🖾 Email a Link	$_{\rm p}\!/^{\rm e}$ Flow $~\vee$	🖷 Word T	emplates $$	💷 Run	Report 🚿	/		
Hol Mess	iday on 30th <sup>age</sup>	July										Active Status	Active Status Reason	Sam Kumar Owner	~
Gen	eral Notificatio	n R	elated												
A	Name	*	Holiday o	on 30th July											
۵	Alert	*	🗘 Holid	day											
≙	Process Start Date	*	6/4/2020	)											
No	tification Mess	age													
A	Message Text	*	Holiday o	on 30th July d	ue to elections			Language *		English				Ŧ	

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.

Save 🛱 Save & Clos	e 🛾	🖞 Draft 🔟 Delete 🕻	) Refresh 🖆 Share 🖾 Email a Link 🖋 Flo	ow 💛 🖷 Word Tem	nplates \vee 📶	Run Report $$		
loliday on 30th Ju	ıly					Active Status	Active Status Reason	Sam Kumar Owner
eneral Notification	Rel	ated						
🗄 Name	*	Holiday on 30th July		×				
🛆 Alert	*	🗘 Holiday	No changes are allowed after the Process Start Da	ate has passed.				
A Process Start Date	*			ОК				

# Notification Message (Languages)

If the created Notification Message (language) is in English then the notification will be displayed only for users whose User Interface language is English.

Every Message can have multiple languages if they are enabled by the user in CRM. There are **two** ways to **Create** Notification Message (Language) for Message record.

- 1. When the user saves a Message, the Language record is automatically created and appears in Notification Message Sub-Grid.
- After Message record is created, and user needs to add another language record (which should be different from the existing one). Click on '+ New Message Texts' button on Sub-Grid and message form will be displayed and you can create a new Notification Message (language) for that particular record.

Notification Message		+ New Message Texts
Message ¥	Message Rich Text 🗸	Language ↑ Y
An account has been created.		English
1 - 1 of 1		${\scriptstyle  \triangleleft } \ \leftarrow \ {\scriptstyle Page} \ {\scriptstyle 1} \ \rightarrow$

Similarly, Notification Message record can be **Updated** in two ways:

1. Change the **'Message Text'** field in the Message record will update the respective Notification Message record as it is in the **'Language'** field of that Message record.

Account Create Me Message General Notification	Related V						-	-	Author Table Tex		0	-
Notification Message												
Message Rich Text	An account has been created											
	Size - B	ΙU	<i>Q</i> • A •	= =	e≣ ⇒≣	"	: =	10	) C <sub>X</sub> ala	•	ÞP P4	

2. Select the Notification Message from its Sub-Grid in Message record and click on the 'Edit' button. Notification Message record form will be opened and you can edit the message from that form.

Notification Message	🖉 Edit 🗎 Delete Message Texts 🗄
✓ Message × Message Rich Text ×	Language $\uparrow$ $\checkmark$
<ul> <li>An account has been created</li> </ul>	English

Note: The 'Message Text' and 'Language' fields will get reset post deleting the respective Notification Message (Language) record (these two fields will reset only after the user refreshes the message record page).

For example, for Multi-Language message, consider there are total three users in the organization out of which one user have **French** language enabled as his CRM's User Interface Language. Alerts4Dynamics gives a provision through which alert message can be added in user's preferred language (French in this example) to be shown to the respective user. In addition, the users that do not have a **'French'** language enabled as their CRM's User Interface language will not be able to see the French message.

Der Account {name} wurde aktualisiert.
Der Account {name} wurde aktualisiert.
Enter text
German - W
Select
English
German

# Message Type

There are two Message Types in Alerts4Dynamics:

- 1. Simple (by default)
- 2. Advanced

#### Simple:

In Simple mode, user can configure the notifications like Message Text, specifying notification audience which can be dynamic users, teams and security roles as well.

For Notification and Email Audiences we can select user type lookup fields which are available on the entity form will be shown in the Include Users, Exclude Users dropdown and for teams, similarly to user we can select team lookups fields.

Gei	neral Notification					
_						
	Name	*				
	Message Type	*	Simple			
	Alert	*				
	Process Start Date	*				
	Process End Date					
Ν	lotification Message	e				
	Message Text	*		Language *	Salact	*

### Advanced:

In Advanced mode, consider a scenario in which the alert is configured for Invoice but we want the notification to be shown on related Account record.

Similarly, we want the Notification and Email Audiences related to the account like **'One to Many'** and **'Many to Many'** relationship.

Ac Me	ctive Lead Messa essage	ge		Active Status	Draft Status Reason
General Notification			alated		
	Name	*	Active Lead Message		
	Message Type	*	Advanced		
	Workflow	×	🖾 Active Lead Alert		
	Alert		Q. Open Leads		
	Process Start Date	*	6/3/2020		
	Process End Date				

Process: Active Lead Alert	
We recommend using Microsoft Flow instead of background workflows. Slick here to start building Flows!         ▲ Common            Conformation             Audit History             Solution Health Rules              Run this workflow in the backg	Entity Lead Category Workflow Options for Automatic Processes Scope Organization Start when: Record is created Record status changes Record is assigned Record fields change Select

# 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.

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

	Dynamics 36	5 ~	Sales Hub	Sales > Accounts		\$ Ø	8 + A 🗘
≡		4	Show Chart +	New 🗎 Delete   🗸	🖒 Refresh 🛛 😚 Detail Map	😽 Heat Map 🛛 🛱 E	mail a Link 🕴 🗸 💅 Flow
63 (⊡ ☆	Home Recent V	Î	🖪 My Ac	tive Accounts	×		
My V	Vork	Ľ	✓ Account Na	ame	↑ 😽 Main Phone	V Address 1:	
*	Dashboards		A Datum Co	rporation	425-555-0182	Redmond	
Ż	Activities		The Phone C	Company Integration	206-555-0118	Seattle	
Custo	omers						

Notifications can be seen by clicking on Notification button.

::: Dynamics 365	Sales Hub	Alerts4Dynamics			E	1 ×
=	$\leftarrow$ 🖾 Show Chart and Focused view $+$ New 💼 Delete $ $ $\vee$	Search			0.5	×
☆ Home ③ Recent ∨	My Active Contacts ~	All	🚫 Critical	🕂 Warning	() Information	
SPinned ∨	◯ Full Name ↑ ~	Announcement				
My Work	Alex Baker	4 minutes ago			×	¢
A Sales accelerator	Avery Howard	Announcement				
Activities	<u>Cacilia Viera</u>	Sales meeting at 3:00 pm. Meeting link				
비로 리아 Dashboards	Carla Yates	-				
Customers	Dwayne Elijah					
Accounts	Haroun Stormonth					
A Contacts	Heriberto Nathan					
Sales	Kevin Martin	Regards, Sales manager				
🌾 Leads	<u>Kim Rocha</u>					
U Opportunities	<u>Miguel Garcia</u>	① Sales Account 51 minutes ago			×	<
S Sales	1 - 11 of 11	A Datum PVT I TD alert r	notification		Dism	niss All

**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.

::: Dynamics 365	iales Hub	Alerts4Dynamics	ez ×
=	← 🖾 Show Chart 📰 Focused view + New 💼 Delete   ∽	Search	QX
☆ Home	My Active Contacts $\vee$	All Critical Aurning	(1) Information
S Recent  ✓ ✓ Pinned	◯ Full Name ↑ ~		
My Work	<u>Alex Baker</u>	2 minutes ago     Invoice: Required 20 printers - 01 has been paid successfully	×
🖉 Sales accelerator	Avery Howard	Announcement	
Activities	<u>Cacilia Viera</u>	U 35 minutes ago	×
₩E Dashboards	Carla Yates	Announcement!	
Customers	Dwayne Elijah	Sales meeting at 3:00 pm. Meeting link	
Accounts	Haroun Stormonth		
A Contacts	Heriberto Nathan		
Sales	Kevin Martin		
🏈 Leads	Kim Rocha		
Opportunities	Miguel Garcia	Regards, Sales manager	
S Sales	1 - 11 of 11		Dismiss All

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

<b>EXAMPLE</b> Dynamics 365	ales Hub	Alerts4Dynamics	E ×
=	← 🖾 Show Chart 🗯 Focused view + New 🛍 Delete   >	Search	0 X
යි Home	My Active Contacts $\vee$		-
🕒 Recent 🗸 🗸		All 🚫 Critical 🕂 Warning	(]) Information
🖈 Pinned 🔍	Full Name ↑ ¥	Eyzher Technologies	
My Work	<u>Alex Baker</u>		×
🔊 Sales accelerator	Avery Howard	Announcement	
🖄 Activities	Cacilia Viera	Amontement     35 minutes ago	×
# Dashboards	Carla Yates	Announcement!	
Customers	Dwayne Elijah	Sales meeting at 3:00 pm. Meeting link	
Accounts	Haroun Stormonth		
R Contacts	Heriberto Nathan		
Sales	Kevin Martin		
🌾 Leads	Kim Rocha		\$
Opportunities	Miguel Garcia	Regards, Sales manager	
S Sales	1 - 11 of 11		Dismiss All

### **Dismissible Alert Notifications:**

If user sets **'Is Dismissible'** field as **'Yes'** then the alert can be dismissed. In this case, **'X'** button will continue showing up on the alert notification indicating that the alert notification is dismissible.

$\leftarrow$	ď	🔛 Save	💕 Sa	ave & Close	+ New	♂ Activate	🗊 Delete	🖔 Refresh	🔍 Check Access	용, Assign	Solution Flow	$\sim$	:		🖻 Share
Re Me	Record Based Alert - Saved Active Status													-	
Ge	neral	Notificat	tion I	Related $\vee$											
				🗳 Seg	oe UI 🝷 🧐	- B	I <u>U</u> 🖉 -	<u></u> ≡ i≡	•≘ •≣ <b>n</b>	≣ ≣ ⊗	्रि ebe	P4 24	9 ° °	🆢 ⊞- 🖏	3 ?
_	Langi	uage	*	English				¥						2	
N	lotifica	tion Config	uration												
	Alert	As	*	Pop-Up					Alert Level	* Inform	nation				
	Displa	ay Until						$\checkmark$							
	ls Dis	missible		Yes											

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<b>Dynamics 365</b> s	Sales Hub	Alerts4Dynamics	ez ×
=	$\leftarrow$ 🖾 Show Chart 🗊 Focused view $+$ New 🛍 Delete $+$ $\vee$	Search	Q X
<ul><li>ᢙ Home</li><li>④ Recent ∨</li></ul>	My Active Contacts $\vee$	All 🚫 Critical 🔥 Warning	() Information
🖈 Pinned 🗸 🗸	C Full Name ↑ Y	A Datum Fabrication	
My Work	<u>Alex Baker</u>	U less than a minute ago A Datum Fabrication dismissible alert notification	×
🖉 Sales accelerator	Avery Howard		
Activities	Cacilia Viera	about an hour ago	×
변화 Dashboards	Carla Yates	Announcement! Greetings	
Customers	Dwayne Elijah	Sales meeting at 3:00 pm. Meeting link	
Accounts	Haroun Stormonth		
Contacts	Heriberto Nathan		
Sales	Kevin Martin		
C Leads	Kim Rocha		
Opportunities	Miguel Garcia	Regards, Sales manager	
S Sales	1 - 11 of 11		Dismiss All

If user sets **'Is Dismissible'** field as **'No'** then the alert cannot be dismissed. In this case, **'X'** button will not be displayed on the alert notification indicating that the alert notification is non-dismissible.

$\leftarrow$	С	🔛 Save	🛱 Sa	ave & Close	+ New	⊘ Acti	vate	🗊 Dele	te Č	) Refr	esh	9	Check Ad	ccess	R	Assig	In	:								🖻 Sł	nare
Re	cord	Based /	Alert -	Saved															Acti Statu	ve		_		0	c	-	$\sim$
Ge	General Notification Related V																										
		ß																									
				🗳 Seg	joe UI 🕞	9 -	BI	U 🆌	2- A	- =	i≡	•= ·	E 37		Ξ	≡ (	න ද	oise	<b>a</b>	1	1 7		æ		<) }	?	
	Langi	uage		English						•																	
N	lotifica	tion Config	juration																								
	Alert	As	*	Pop-Up								Alert	Level		,	* Inf	ormati	ion									
	Displ	ay Until								$\vee$																	
	ls Dis	missible		No																							

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::: Dynamics 365	Sales Hub	Alerts4Dynamics	ez ×
=	$\leftarrow$ 🖾 Show Chart and E Focused view $+$ New 🛍 Delete $ $ $\vee$	Search	0 ×
合 Home	My Active Contacts $\vee$		
🕓 Recent 🗸 🗸		All 🚫 Critical 🕂 Warning (	<ol> <li>Information</li> </ol>
🖈 Pinned 🗸 🗸	Full Name ↑ ~		
My Work	<u>Alex Baker</u>	A Datum Fabrication     5 minutes ago	
🖉 Sales accelerator	Avery Howard	A Datum Fabrication non dismissible alert notification	
Activities	Cacilia Viera	0 Account for Email 79 4 minutes ago	
해~ Dashboards	Carla Yates	Internet and a set of the se	
Customers	<u>Dwayne Elijah</u>	Account for Email 49     4 minutes ago	
Accounts	Haroun Stormonth	non dismissible alert notification	
R Contacts	Heriberto Nathan	Account for Email 54     4 minutes and	
Sales	Kevin Martin	in the second se	
C Leads	<u>Kim Rocha</u>	D Account for Email 59 4 minutes ago	

Note:

- By default the value of the field 'Is Dismissible' will be 'Yes'
- Despite setting dismissible as 'No', alert will still be dismissed if the respective notification is deactivated or the 'Display until' date of the alert message is already passed

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  $\rightarrow$  Alerts  $\rightarrow$  Select Alert  $\rightarrow$  Select Message  $\rightarrow$  Notification Tab  $\rightarrow$  Select Notification and you can view the status.

Note: Only Alerts4Dynamics Administrator, Alerts4Dynamics Manager and System Administrator can see Log of Notifications.

General Related	
Read Notifications	💍 Refresh 🛛 🗐 Run Report 🗸 🗄
$\checkmark$   User $\downarrow$ $\checkmark$	Date $\checkmark$
⊙ Sam Kumar	6/1/2020 6:33 PM
Dismissed Notifications	🖔 Refresh 🔟 Run Report 🗸 🗄
$\checkmark$ User $\downarrow$ $\checkmark$	Date $\checkmark$
O Sam Kumar	6/1/2020 6:33 PM

# Message Rich Text

This provision allows users to create more interactive messages by doing all kinds of text formatting, adding links and images, etc., to make their alerts and notifications more descriptive and engaging.

Message Rich Text field supports the following text formatting options:

- Change font style and size, bold text, italic text.
- Underline text, strikethrough text, add background color, text color.
- Insert bullets and numbered lists, decrease or increase the indent and add quotation marks.
- Add links, images, tables in messages.



Once the alert is created, the message will be displayed in the notifications.

::: Dynamics 365	Sales Hub	Alerts4Dynamics	e ×
=	← 🖾 Show Chart 📰 Focused view + New 🗎 Delete   ∽	Search	QX
<ul><li>ᢙ Home</li><li>④ Recent ∨</li></ul>	My Active Contacts $\sim$	All 🚫 Critical 🕂 Warning	① Information
🖈 Pinned 🗸 🗸	◯ Full Name ↑ ~	Announcement	
My Work	<u>Alex Baker</u>	55 minutes ago	×
🖉 Sales accelerator	Avery Howard	Greetings	
Activities	<u>Cacilia Viera</u>	Sales meeting at 3:00 pm. Meeting link	
將 Dashboards	Carla Yates		
Customers	Dwayne Elijah		
Accounts	Haroun Stormonth		
Q Contacts	Heriberto Nathan		
Sales	Kevin Martin	Regards, Sales manager	
🎸 Leads	<u>Kim Rocha</u>		
Opportunities	Miguel Garcia	① Sales Account about 2 hours ago	×
S Sales	1 - 11 of 11	A Datum PVT LTD alert notification	Dismiss All

#### Note:

- If both Message Text and Message Rich Text fields are filled, then preference will be given to Message Rich Text when displaying the notification.
- Message Rich Text cannot be displayed as a bar in a form notification.
- To add Message Rich Text in Event-Based Alerts you need to create messages text before creating the workflow using "Message Texts" of Alerts4Dynamics App.

# **Search Notifications**

With the search notification feature on the notification panel, users can quickly search for desired Announcements and Notifications.

For example, a sales manager can quickly find any notification by searching for it on the notification panel, and it will display the desired notifications in real-time.

Dynamics 365	Sales Hub	Alerts4Dynamics 🖂 🔀
=	← 🖾 Show Chart ﷺ Focused view + New 🖔 Refresh	Winford Ashed
命 Home	My Open Leads 🗸	
🕒 Recent 🗸 🗸		All 🚫 Critical 🥂 Warning 🕕 Information
🖈 Pinned 🗸 🗸	Name Y	Josiah Love
My Work	Kenya Brady	U 43 minutes ago X New lead Josiah Love for 10 Airpot Duo Coffee Makers for Alpine Ski House has been created
🔊 Sales accelerator	Kenya Brady	successfully.
Activities	Rachel Michael	Harrison Curtis     43 minutes ano     X
₩ Dashboards	Alex Baker	New lead Harrison Curtis for 5 Café Duo Espresso Machines for Fabrikam has been created successfully.
Customers	Lavona Field	Iomaine Parrett
Accounts	Lilly Pyles	O 43 minutes ago     New lead Jermaine Berrett for 5 Café Lite Espresso Machines for A. Datum has been created
A Contacts	Reuben Kidd	successfully.
Sales	Jabez Parker	0 Gerald Stephens 43 minutes ago ×
🍄 Leads	Winford Asher	New lead Gerald Stephens for 10 Airpot Lite Coffee Makers Long-term Lease for Alpine Ski House has been created successfully.
Opportunities	Josiah Love	lvan Cashin
S Sales	1 - 17 of 17	U) in strate

Dynamics 365	Sales Hub	Alerts4Dynamics 🗈 🔀
=	← 🖾 Show Chart 🗯 Focused view + New 🕐 Refresh 👔	Winford Asher Q X
命 Home	My Open Leads X	
🕒 Recent 🗸 🗸		All 🚫 Critical 🔥 Warning 🕕 Information
🖈 Pinned 🗸 🗸	Name Y T	Winford Asher
My Work	Kenya Brady	U 14 minutes ago X New lead Winford Asher for 10 Airpot Coffee Makers for Fabrikam has been created successfully.
🔊 Sales accelerator	Kenya Brady 2	
Activities	Rachel Michael 2	
🐺 Dashboards	Alex Baker S	
Customers	Lavona Field	
Accounts	Lilly Pyles	
A Contacts	Reuben Kidd 1	
Sales	Jabez Parker	
😵 Leads	Winford Asher	
Opportunities	Josiah Love 1	
S Sales	1 - 17 of 17	Dismiss All

Users can clear all the search results by using 'Clear Icon'.
Dynamics 365	ales Hub	Alerts4Dynamics	: ×
=	← 🖾 Show Chart 🗯 Focused view + New 🖔 Refresh	Josiah Love	~
<ul><li>ᢙ Home</li><li>③ Recent ∨</li></ul>	My Open Leads 🗸	All OCritical A Warning () Information	de la
🖈 Pinned 🗸 🗸	Name Y		,
My Work	Kenya Brady	50 minutes ago New lead Josiah Love for 10 Airpot Duo Coffee Makers for Alpine Ski House has been created	
🖉 Sales accelerator	Kenya Brady	successfully.	
Activities	Rachel Michael		
লই Dashboards	Alex Baker		
Customers	Lavona Field		
Accounts	Lilly Pyles		
A Contacts	Reuben Kidd		
Sales	Jabez Parker		
C Leads	Winford Asher		
1 Opportunities	Josiah Love		
S Sales	1 - 17 of 17	Disr	miss All

# Email Digest Workflow Configuration

With Email Digest Workflow feature, users with an Alerts4Dynamics administrator role, manager or user role can receive, unread, read not dismissed, or all notifications as email. Users can receive the email automatically on a Daily, weekly, and Monthly basis.

To use this feature, you need to configure an email template and then assign it to your desired user to send the notifications via E-Mail.

To set up the email template follow, the steps below:

• Go to Advanced Settings → Customizations.

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Dynamics 365	Sales Hub	Try the new look $igodot$	7 © ? ¢ G
	$\begin{subarray}{ccc} \end{subarray} \begin{subarray}{ccc} \end{subarray} \end{subarray} \begin{subarray}{cccc} \end{subarray} \end{subarray} \begin{subarray}{ccccc} \end{subarray} \end{subarray} \begin{subarray}{cccccccccccc} \end{subarray} \end{subarray} \begin{subarray}{cccccccccccccccccccccccccccccccccccc$	Fourse research pet selected	Settings
Home Recent V Pinned V	My work list		General About
y Work Sales accelerator			Legal terms 🖃
] Activities 후 Dashboards			More Settings Personalization Settings Advanced Settings
ustomers			Toast Notification Display Time
Contacts	Activities will appear here Create sequences to populate the work		Try the new look
Leads	Create sequences		
Competitors			
ollateral ලී Quotes			
Crders Sales	0 items Last updated at 2:34 PM		

Dynamics 365	Settings ~ Security Al	ex Leo >				م	- ®	Y	٥	? 🕒
Settings										
Business	Customization	System		Process Center	Application	Alerts4Dynamics				
Business Manageme.	. Customizations	Administration	Email Configuration	Processes	Apps	Alerts	(i) L	icense Regis	tration	
Templates	Solutions	Security	Activity Feeds Confi	Microsoft Flows		Entity Configuration	s			
Product Catalog	Microsoft AppSource	Data Management	Activity Feeds Rules			Message Texts				
Service Management	←■ Plug-In Trace Log	System Jobs	Dynamics 365 App f			Notifications				
Mobile Offline	Solutions History	Document Manage	Sales Insights			Alerts4Dynamics Log	gs			
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• Choose "Customize the System."

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Custom	ization			
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	Customize the System Create, molify, or delete components in your organization. Components include entities, fields, relationships, forms, reports, processes, and others.	29	Publishers Create, modify or delete a solution publisher.	
*	Solutions Create, modify, export, or import a managed or unmanaged solution.		Developer Resources View information or download files that help you develop applications and extensions for Microsoft Dynamics 365.	
	Themes Adjust your organization's colors. Create, change, or delete themes that are used in your organization.			

• Select "Email Templates" and click on "New" button.

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• Select Template Type as "Global." Let it be that way and click "Ok."

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• Now, set up an email template based on your requirements. Here, we will create an email template for sending unread notifications as mail.

- Fill in the following fields:
  - **Name:** Give a suitable name for the Email Template.
  - **Permission Level (Option):** By default, permission level is set to **"Individual."** You can select your desired permission level.
  - Category: By default, it is set to "User."
  - Language: Select a desired language for the email template.
  - **Description (Optional):** Provide a description for the email template.
  - **Subject:** Give a suitable subject line for the email. Here we will keep the subject line as "Unread Notifications".

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• Email Body: Draft an email body based on your requirements.

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• Click on "Save & Close".

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Note:

- You can only send up to 100 notifications in an email.
- To send notifications in the email body, you need to write this text as is "{{body}}".

Once you have set up the email template, follow the below steps to assign the email template for sending the unread notifications to your desired CRM user.

• Navigate to Advanced Settings → Security.

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Settings							
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Mobile Offline	Solutions History	Document Manage	Sales Insights			Alerts4Dynamics Logs	
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• Select "Users".

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Security	у									
Which fea	ature would you like	e to work with?								
	Users Add new users. Edit info	ormation about users and deac	ivate user records. Manage the tea	ams, roles, and licenses assigned to	users.		Teams Add new teams and new members to existing teams. Modify the team description and delete members f	rom teams.		
	Security Roles Create new security role	es. Manage and delete existing	security roles for your organization	n.	I		Business Units Add new business units. Edit and deactivate existing business units. Change the parent business unit.			
	Field Security Pro Manage user and team	files permissions to read, create, or	write information in secured fields.				Hierarchy Security Configure hierarchy security, including enabling hierarchy modeling and selecting the model. You can als and specify the entities to exclude from a hierarchy.	o specify how de	p the hierarch	/ goes,
	Positions Add new Position. Modi	ify the Position description.			5		Access Team Templates Add new team templates. Modify the team template description.			

• Click on "Enabled Users".

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• Select the user to whom you want to assign the email template .

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- Now a form will appear.
- Fill in the following fields:
  - Notification Type: Select the suitable notification type, here we will select "Unread Notifications" as we want to send unread notifications in email.
  - Notification Occurrence: From the daily, weekly, and monthly options, select any one interval at which you want to send notifications to the user. Here we will select the "Daily" option.
  - View Columns Display Order: select "Active Notifications" or "Inactive Notifications" view to display notifications on email body in a similar layout to the CRM entity view columns. Here we will select the "Active Notifications".

- Email Template: Select your desired email template. Here we will select the "Email Template for Unread Notifications" that we had configured earlier.
- Click on **"Save"** icon in the bottom right corner.

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Note:

- When you select any notification occurrence option, the notification occurrence date and time will be set from that time on. For example, if you select the weekly option at 3:00 o'clock on Friday, notifications will be sent to you via mail every Friday at 3:00 o'clock.
- Users can also select custom view in the "View Columns Display Order" field.

Once you have successfully configured the email template and assigned it to your desired user, you will be able to receive the notifications as emails. You can see the result of the above configuration <u>here</u>.

## Post Notification Configuration

With Post feature, you can create and deliver custom post messages to users by tagging them directly from the CRM record form.

Follow the below steps to enable the post feature:

• Go to Advanced Settings --> Activity Feeds Configuration.

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	Sites Create new sites or office	locations where service operations take p	lace. Add and remove resources, change	site information, or delete sites.	Subjects Manage the subject h	ierarchy for your organization's product	s, literature, and articles.	
	Add new currencies or cha	ange the exchange rates for existing curre	ncies.		Connection Role Create, edit, and delet	25 te the standard labels used to define con	nections between records.	
¢ ⇒= ¢	Automatic Record Create and manage rules	Creation and Update Rules for automatic record creation and update	s. You can set up rules for either out-of-t	he-box entities or custom entities.	Rollup Queries Go to your list of Roll	up Queries that you can use to gather di	ata about a group of related records.	
:	LinkedIn Sales Navi	igator						

• Select "Post Configurations" in the system view.

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• Select your desired entity to enable the post feature for that specific entity. Here we will select **'Contact'** entity.

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#### Note:

- You can also enable the post feature for custom entities.
- To activate the post feature for the contact entity, click on 'Activate'.

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Once you have successfully enabled post feature for Contact entity, visit - <u>https://make.powerapps.com</u> to add post section to the timline of the contact record form.

Make sure you are using the same CRM instance in PowerApps that you are using in your CRM.

• CRM:

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• Select 'Forms'.

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G +	Home	Table properties	③ Properties	Schema ①	Data experiences ①	Customizations ①
- BB 	Learn Apps Tables Flows	Name         Primary column           Contact         Full Name           Type         Last modified           Standard         4 days ago	Description Person with whom a business unit has a relationship, such as customer, supplier, and colleague.	Columns ¤d Relationships G Keys	<ul> <li>☐ Forms</li> <li>☐ Views</li> <li>∠<sup>*</sup> Charts</li> <li>☐ Dashboards</li> </ul>	<ul> <li>Business rules</li> <li>Commands</li> <li>Messages</li> </ul>
8	Solutions More	E Contact columns and data			🕎 Update forms	and views 🥒 Edit 🛛 🗸
Ş	Power Platform					

• Select main **'Contact'** form.

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		Contact form for Customer Card	-	Main	On	Yes	No	Interconnect Image: Search   Sales Trial Image: Search     stomized V Customizable V   Yes Yes   Yes Yes

• Select 'Timeline' section.

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• Select 'Posts'.

P a g e 86 of 132

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• Under posts section, choose 'Enable User Posts'.

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• Click 'Save and Publish' to publish changes.

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ç	Address 1: City	First Name			
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	& Address 1: Phone	Email			Select and order commands
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Once you have successfully configured the post notification feature for your desired entity, you need to set up a workflow in CRM to trigger post notifications for your specific needs.

For example, here we will create a workflow for triggering post notifications when a single user is tagged with a custom post message on the timeline of the contact record form.

Follow the steps below to configure the workflow:

• Navigate to Advanced Settings → Processes.

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Setting																
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•	Product Catalog	$\triangleright$	Microsoft AppSource	٥,	Data Management		Activity Feeds R	Rules					Message	e Texts		
*×0	Service Management	€∎	Plug-In Trace Log	₽,	System Jobs		Dynamics 365 A	App f				٢	Notificat	tions		
	Mobile Offline	$\odot$	Solutions History	Г,	Document Manage	Ŷ	Sales Insights					E.	Alerts4D	)ynamics Lo	gs	
¢¦ộ	Sync Error				Auditing							¢.	Configur	rations		
	Sites Create new sites or office lo sites.	cations w	vhere service operations take pl	lace. Add a	and remove resources, change s	site inform	iation, or delete	ß	Subjects Manage the subject hierarchy for you	r organization's products, literat	ture, and a	irticles.				
2	Currencies Add new currencies or chan	ige the ex	change rates for existing curre	ncies.					Connection Roles Create, edit, and delete the standard	labels used to define connection	ns betweer	n records.				
	Automatic Record Cr Create and manage rules fo entities.	r <b>eation</b> r automa	and Update Rules itic record creation and updates	s. You can	set up rules for either out-of-th	he-box ent	ities or custom	Ŀ	Rollup Queries Go to your list of Rollup Queries that	you can use to gather data abo	ut a group	o of related	l records.			

• Click on 'New'.

	Dy	ynamics 365 Settings 🗸 Processo	es >					Q	• 0	$\nabla$	۲	?	
0	Web clie	lient experience for security settings is being deprecated Ple	ease use the Power Platform admin center	to leverage the latest experience and ma	nage security settings	Learn More						:	×
+	NEW	🛅 DELETE 🛛 🖛 📾 EMAIL A LINK 🖙 👦 🖉 FLOW	- 🔩 EXPORT TO EXCEL 🕒 🗏	🗟 VIEW 🛛 🕞 NEW SYSTEM VIEW	CUSTOMIZE E	NTITY 🔹 SYSTEM	VIEWS						
	-12	My Processes ¥						Search for r	ecords			9	
		]   Process Name 1	Category	Primary Entity	Status	Created On	Modified On				Ŧ	Ö	
		AddRemoveFieldFromForm	Action		Activated	6/4/2024 2:5	6/4/2024 2:5						
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		Alerts4Dynamics - Notification - Manage Audien	Workflow	Notification	Activated	6/4/2024 2:5	6/4/2024 2:5					11	
		Alerts4Dynamics - User Preference - Email Notifi	Workflow	Notification	Activated	6/4/2024 2:5	6/4/2024 2:5					11	
		Alerts4Dynamics Batching Process	Workflow	Batching	Activated	6/4/2024 2:5	6/4/2024 2:5					11	
		Alerts4DynamicsSendLicenseRequest	Action		Activated	6/4/2024 2:5	6/4/2024 2:5					11	
		Create Bulk Deletion Jobs	Workflow	Configuration	Activated	6/4/2024 2:5	6/4/2024 2:5					11	
		Create Notification From Notification Request	Workflow	Notification Request	Activated	6/4/2024 2:5	6/4/2024 2:5						
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	1	Notification Occurrence Mail 1 - 15 of 15 (0 selected) All # A	B C D E F	G H I J K L	Activated M N O	6/4/2024.2-5 PQR	6/4/2024.2-5 STUV	w x	Y Z	4 4	Page 1	•	

- Process Name: Enter a desired process name.
- Category: Select 'Workflow'.
- Entity: Select 'Post'.
- Click **'OK'**.

Dynamics 365 Settings  Processes		م	9 +	7	۲	?	0
Web client experience for security settings is being deprecated Please use	the Power Platform admin center to leverage the latest experience and manage security settings						>
+ NEW 🏛 DELETE 🖙 🖘 EMAIL A LINK 👻 👦 GLOW 👻	🔍 EXPORT TO EXCEL 🖙 🖏 VIEW 🕼 NEW SYSTEM VIEW 🚯 CUSTOMIZE ENTITY 🔯 SYSTEM VIEWS						
⇔ My Processes ×	Create Process Define a new process or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.	Search for r	records				
	Process name: * Post Notification Workflow						
□   Process Name ↑   Cat	rgor Category: * Workflow V Entity: * Post V				,	<b>T</b> ()	
AddRemoveFieldFromForm Act	Run this workflow in the background (recommended)					-	
Alerts4Dvnamics - Delete Notification Record Wo	We recommend using Microsoft Flow instead of background workflows. <u>Click here</u> to start building Flows!						
Alerts4Dynamics - Notification - Manage Audien Wo	type:      New process from an existing template (select from list):						
Alerts4Dynamics - User Preference - Email Notifi Wo	kfio   Template Name 🛧   Primary Entity   Ow						
Alerts4Dynamics Batching Process Wo	kflor 🗘						
Alerts4DynamicsSendLicenseRequest Acti	an Antonia and Antonia						
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1 - 15 of 15 (0 selected) 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		Page 1	•	

• Click on 'Add Step' and select 'Create Record'.

Power Apps						
File	🖳   🌒   🔾 Activate 🛛 📰 Conve	t to a real-time workflow	🖷 Show Dependencies	Solution Layers	<u>∱A</u> ctions <del>-</del>	<u> </u>
Process: Post Notification	Workflow				Worki	ng on solution: Default Solution
We recommend using Microsoft Flow	instead of background workflows. Click I	ere to start building Flows!				
<ul> <li>4 Common</li> <li>Audit History</li> <li>Catalog Assignments</li> <li>Catalog Assignments</li> <li>SLA Items</li> <li>PM Recordings</li> <li>Agent script steps</li> <li>Macro Run Histories</li> <li>Entities</li> <li>Entities</li> <li>Workflow Triggers</li> <li>Messages</li> <li>Messages</li> <li>Card</li> <li>Chatbo subcompone</li> <li>Process Sessions</li> </ul>	General Administration Notes  Hide Process Properties  Process Name * Post Notific Activate As Process  Available to Run Run this workflow in the backg As an on-demand process As a child process Workflow Job Retention Automatically delete complete  Add Step * ===================================	ation Workflow round (recommended) d workflow jobs (to save dis ete this step.	sk space)	Entity Category <b>Options for Au</b> Scope Start when:	Post Workflow tomatic Processes Organization Record is created Record is deleted Record fields change Record is deleted	
Status: Draft	Send Email	•				

• Select 'Notification Request'.

Power Apps					
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Status: Draft					

• Click on 'Set Properties'.

P a g e 90 of 132

Power Apps				
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Process: Post Notificatio	) Workflow		Working	) on solution: Default Solution
We recommend using Microsoft Flo	w instead of background workflows. <u>Click here</u> to start building Flows!			
<ul> <li>✓ Common</li> <li>Audit History</li> <li>Audit History</li> <li>Catalog Assignments</li> <li>Catalog Assignments</li> <li>SLA Items</li> <li>PM Recordings</li> <li>Agent script steps</li> <li>Macro Run Histories</li> <li>Entities</li> <li>Entities</li> <li>Entities</li> <li>Workflow Triggers</li> <li>Messages</li> <li>Messages</li> <li>Card</li> <li>Chatbot subcompone</li> <li>Process Sessions</li> </ul>	Administration       Notes         • Hide Process Properties         Process Name *       Post Notification Workflow         Activate As       Process         Autivate As       •         Mailable to Run       •         As an on-demand process       •         As a child process       •         Workflow Job Retention       •         Automatically delete completed workflow jobs (to save disk space)         Image: Add Step *       Image: Image: Type a step description here.         Create:       Notification Request       •         Image: Notification Request       •       •	Entity Category <b>Options for Au</b> Scope Start when:	Post Workflow tomatic Processes Organization Record is created Record status changes Record fields change <u>Select</u> Record is deleted	
Status: Draft				·

- Fill in the following details:
  - Name: Enter a Desired Name.
  - **Pop Up:** Set it to **'Yes'**.
  - Form Notification: Set it to 'Yes'.
  - Is Dismissible: Set it to 'Yes'.
  - Display As: Set it to 'Dialog'.
  - Alert Level: Set it to 'Information'.

File Save and C	lose						C	) <u>H</u> el
Process: Post N Create Noti	lotification Workflow fication Request							
Notification Settin	qs						Form Assistant	
Name *	Notification for New Contact						Dynamic Values	
Message Text							Dynamic Values	
Message Rich Text							Operator:	
Alert As							Set to	
Pop-Lip			Email Notification				Post	
Fop-op	No Ves		Is Dismissible	No Ves			Created By	
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Alert Level *	Information					~		
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Regarding						<u></u>		
Notification Associated W	Vith						Default value:	
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4 A. P. C. W.							ОК	
<ul> <li>Audience Settings</li> </ul>								
Notification Audien	Ices							
Include Users		Q	Exclude Users			9		
Team		<u>a</u>						
Email Recipients								
To - Same As Include Use	ers 🔿 Yes 🔿 No							
From			То					
cc		1	BCC					

Note: Post feature gives priority to text in the Message Rich Text field. For example, if a user has added text to the message text, message rich text, and post sections on timeline, then while sending the notification to the user, first priority will be given to the text in the Message Rich Text field.

• Select 'Regarding (Contact)' and 'Contact' from the 'Look for' field.

File Save and Close						
Create Notification Request						
Notification Settings			A	Form Assistant >		
Name *	Notification for New Contact			Dynamic Values		
Message Text				Dynamic Values		
Message Rich Text				Operator:		
Alert As				Set to V		
Pop-Up	🔿 No 🌘 Yes	Email Notification	No Yes	Regarding (Contact)		
Form Notification	No No Yes	Is Dismissible	No (e) Yes	Contact 🗸		
Display As	Dialog 🗸	User Preference	No Yes	Add		
Alert Level *	Information		<b>v</b>	X 🔹 🕸		
Display Until				Contact(Regarding (Contact))		
Regarding	{Contact(Regarding (Contact))}					
Notification Associated With				Default value:		
Current Record Lin				<b></b>		
Content Necola on				OK		
Audience Settings						
Notification Audiences						
Include Users		Exclude Users				
Team		[				
Email Recipients						
To - Same As Include Users	Ves No					
From		То				
cc	0	BCC				
Related Record Settin	15					
Primary Record Reference		]				
Related Notification A	diences		*			

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• Click on 'Add' button and then 'OK' to add it to the Regarding field.

Save and Close				(in Halo
File				M⊡eh.
Process: Post Notifi	cation Workflow			
← Create Notifica	tion Request			
Notification Settings				Form Assistant
Name *	Notification for New Contact			Dynamic Values 🗸
Message Text				Dynamic Values
Message Rich Text				Operator:
Alert As				Set to V
Pop-Up	🔿 No 🕚 Yes	Email Notification	○ No ○ Yes	Regarding (Contact)
Form Notification	🔿 No 🔘 Yes	Is Dismissible	🔿 No 💿 Yes	Contact V
Display As	Dialog 🗸 🗸	User Preference	○ No ○ Yes	
Alert Level *	Information		~	
Display Until				contactivegationing (contacti)
Regarding	{Contact(Regarding (Contact))}			
Notification Associated With				Default value:
Current Record Url				
				ОК
Audience Settings				
Notification Audiences				
Include Users		Exclude Users		
Team				
Email Recipients				
To - Same As include Users	○ Yes ○ No			
From	۵.	То		
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A Related Record Settin	15			
Primary Record Reference				
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• Select 'Regarding(Contact)' from the 'Look for' field.

File Save and Close				@ <u>H</u> elp +
Create Notifica	ation Workflow tion Request			
Notification Settings				Form Assistant
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Pop-Up	🔿 No 🔞 Yes	Email Notification	No Yes	Regarding (Contact)
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Display As	Dialog 🗸 🗸	User Preference	○ No ○ Yes	Related Entities Created By (Delenate) (Licer)
Alert Level *	Information		▼	Created By (User)
Display Until				Modified By (Delegate) (User) Modified By (User)
Regarding	[Contact(Regarding (Contact))]			Organization (Organization) Post Reparding (Post Reparding)
Notification Associated With				Regarding (Account)
Current Record Liri				Regarding (Case)
				Regarding (Contact)
Audience Settings				Regard Regarding (Contact)
Notification Audiences				Regarding (Opportunity)
Include Users		Exclude Users		Regarding (Swarm) Regarding (User)
Team		1		Local Values 🔻
Email Recipients				
To - Same As Include Users	Ves No			
From		То		
cc		BCC		
Related Record Settin	JS			
Primary Record Reference				
Related Notification A	diences			▼ 4 ►

• Select 'Record URL (Dynamic)'.

	Alerts4D	ynamics -	– User Manual		
Save and Close					6
rice					
Create Notification Request					
Notification Settings					<ul> <li>Form Assistant</li> </ul>
ame * Notification for New Contact					Dynamic Values
lessage Text					Dynamic Values
iessage Rich Text					Operator:
lert As					Look for:
sp-Up 🔿 No 💿 Yes		Email Notification	○ No ○ Yes		Regarding (Contact) Record URL(Dynamic)
Irm Notification No  Yes		Is Dismissible	🔿 No 💿 Yes		Profile Last Activity Profile Modified On
splay As Dialog	· · · · · · · · · · · · · · · · · · ·	User Preference	○ No ○ Yes		Public Profile Copy Record Control On
ert Level * Information				~	Record URL(Dynamic)
splay Ontil					Role Record URL(Dyn
And the Associated Miles					SLA Salutation
					Security Stamp Send Marketing Materials
rrent Record Uri					Shipping Method
Audience Settings					Status
otification Audiences					Suffix
lude Users		Exclude Users			TeamsFollowed Telephone 3
am					Territory Time Spent by me
nail Recipients					
- Same As Include Users 🛛 Yes 🔿 No					
om		То			
		BCC			
Related Record Settings					
imary Record Reference		1			
		-			<b>T</b> 4

• Click on 'Add' button and then 'OK' to add it to the 'Notification Associated With' field.

File Jane and Cube	W Help +
Page Process: Post Notification Workflow	
Create Notification Request	
<ul> <li>Notification Settings</li> </ul>	Form Assistant
Name * Notification for New Contact	Dynamic Values 🗸 🗸
Message Text	Dynamic Values 🔺
Message Rich Text	Operator:
Alert As	Set to V
Pop-Up No @ Yes Email Notification No Yes	Regarding (Contact)
Form Notification No @ Yes Is Dismissible O No @ Yes	Record URI (Dynamic)
Display As Dialog Viser Preference O No O Yes	A00
Alert Level * Information	A W A
Display Until	Record OKL(Dynamic)(Regarding (C 🔔
Regarding Econtact/Regarding (Contact)	
Notification Associated With Record URUDynamic(Regarding Contact))	Default value:
Current Record Url	
	OK
- Audience Securitys	
Notification Audiences	
Include Users Dickled Users	
Team a	
Email Recipients	
To - Same As include Users 🕜 Yes 🕜 No	
From To To	
D 208 C 208	
Related Record Settings	
Diman Banna Batasang	
Belatet Notification Audiences	▼ ∈ ►

• Now to fill out the **'Current Record Url'** field, go to the Look for field and select **'Post'** entity.

		Alerts4Dynamics – Use	er Manual	
File Ind Save and Close				<b>8</b> 1
Process: Post Not	ification Workflow			
Create Notified	cation Request			
Notification Settings				Form Assistant
Name *	Notification for New Contact			Dynamic Values
Message Text				Dynamic Values
Message Rich Text				Operator:
Alert As				Look for:
Pop-Up	🔿 No 🔘 Yes	Email Notification O No O	Yes	Post Primary Entity
Form Notification	○ No ● Yes	Is Dismissible O No 💿	Yes	Post
Display As	Dialog	User Preference O No O	Yes	Created By (Delegate) (Us PO
Alert Level *	Information		``````````````````````````````````````	Modified By (Delegate) (User)
Regarding	(Contact/Renarding (Contact))			Modified By (User)     Organization (Organization)
				Post Regarding (Post Regarding Regarding (Account)
*	(Kecord UKL(Uynamic)(Kegarding (Contact)))			Regarding (Case) Begarding (Competitor)
Current Record Url	L			Regarding (Contact)
Audience Settings				Regarding (Knowledge Article)
Notification Audience	25			Regarding (Lead) Regarding (Opportunity)
Include Users		Exclude Users	5	Regarding (Swarm) Regarding (User)
Team				Local Values
Email Recipients				
To - Same As Include Users	○ Yes ○ No			
From		To	ם	1
cc		a BCC	ס	0
A Related Record Setti	ngs			
Primary Record Reference				
Related Notification	Audiences			▼ (

# • And then select 'Record URL (Dynamic)'.

File Save and Close					@Help +
Create Notific	cation Workflow stion Request				
Notification Settings				-	Form Assistant
Name *	Notification for New Contact				Dynamic Values
Message Text					Dynamic Values
Message Rich Text				3	Operator:
Alert As					Set to
Pop-Up	No Yes	Email Notification	○ No ○ Yes	- 1	Post V
Form Notification	No Yes	Is Dismissible	No le Yes	- 11	Record URL(Dynamic)
Display As	Dialog	User Preference	No Yes	- 1	Created By (Delegate)
Alert Level *	Information			<b>v</b>	Created On Modified By
Display Until					Modified By (Delegate)
Regarding	(Contact(Regarding (Contact)))				Organization
Notification Associated With	(Record URL(Dynamic)(Regarding (Contact)))				Record URL(Dynamic)
Current Record Url					Regard Record URL(Dynamic)
Audience Settings					Source Text
Notification Audiences					Text
Include Users		Exclude Users			Type
Team					UTC Conversion Time Zone Code
Email Recipients					
To - Same As Include Users	○ Yes ○ No				
From		То		3	
cc		BCC		3	
A Related Record Settin	gs				
Primary Record Reference					
Related Notification A	idiences			•	т Р

# • Click on 'Add' button and then 'OK' to add selected options in the 'Current Record Url' field.

	AI	erts4Dynamics – User Manual	
File Save and Clos	e		
Create Notifie	ation Request		
Notification Settings			Form Assistant
motification settings	Marthan Inc. Mar. Propaga		Dynamic Values
Anne -	Notification for New Contact		Dynamic Values
lessage Rich Text			Operator
lort Ac			Set to
ICIT AS	0 N <b>0</b> K	- 19 - C - C - C - C - C - C - C - C - C -	Look for: Post
p-up	UND THES	Email Notification No Vies	Record URL(Dynamic)
iniav As	Dialog	Ilicer Draferance	Add
, , , ,			X # #
ert Level * solav Lintil	Information		Record URL(Dynamic)(Post)
egarding	{Contact(Regarding (Contact))}		
otification Associated With	(Record URL(Dynamic)(Regarding (Contact)))		Default value:
urrent Record Url	(Record 1181 (Dynamic)(Dest))		
	become outre treatment and		ок
Audience Settings			
otification Audience	5		
clude Users		Exclude Users	
am			
nail Recipients			
- Same As Include Users	○ Yes ○ No		
om		oT [20]	
		BCC	
Related Record Setti	ngs		
imary Record Reference			
-1-4-4 41-4141-414-41	udiancer		▼ 4

Note: Current Record URL field is a unique field only for post notification workflow.

• Click on 'Save and Close'.

File Save and Close				
Process: Post Notif Create Notifica	cation Workflow tion Request			
A Notification Settings				Form Assistant
Name *	Notification for New Contact			Dynamic Values 🗸 🗸
Message Text				Dynamic Values
Message Rich Text				Operator:
Alert As				Set to V
Pop-Up	🔿 No 💿 Yes	Email Notification	No Yes	Post ¥
Form Notification	🔿 No 💿 Yes	Is Dismissible	🔿 No 🜘 Yes	Record URL(Dynamic)
Display As	Dialog 🗸	User Preference	○ No ○ Yes	Nu
Alert Level *	Information		v	Pararel IIPI / Dunamic/(Dart)
Display Until				Record Oracloynamic)(Post)
Regarding	[Contact(Regarding (Contact))]			
Notification Associated With	(Record URL(Dynamic)(Regarding (Contact))			Default value:
Current Record Url	(Record URL/Dynamic)(Post))			·,
Audience Settings				OK
Notification Audiences				
Include Users		Exclude Users		
Team			m4	
For all De alging to	<u>щ</u>			
Email Recipients				
to - Same As Include Users		Te		
rom		10		
cc	<b>_</b> _	BCC		
A Related Record Settin	32			
Primary Record Reference		]		

• Now **Save** and **Activate** the workflow.

Power Apps		
File 🛃 🗟 Save and Close	2 🖺 📔 💿 Activate 🔄 Convert to a real-time workflow 🛛 🕰 Show Dependencies 📄 📑 Solution Layers 🎪 Actions 🕶	
Process: Post Notificatio	on Workflow We	rking on solution: Default Solution
We recommend using Microsoft Fla	ow instead of background workflows. <u>Click here</u> to start building Flowsl	
Common     Information	General Administration Notes	A
Audit History     Catalog Assignments     Comments     SLA Items     PM Recordings     Agent script steps     Macro Run Histories     imespents     Entities     Entities     Workflow Triggers	Hide Process Properties   Process Name*   Process Name*   Activate As   Process   Available to Run   Quartized As   Run this workflow in the background (recommended)   As an on-demand process   As a child process   Workflow Job Retention   Verticed Automatically delete completed workflow jobs (to save disk space)   Record is deleted	•
<ul> <li>Messages</li> <li>Messages</li> <li>Card</li> <li>Chatbot subcompone</li> <li>Process Sessions</li> <li>Process Sessions</li> </ul>	Add Step •       Bellete this step.         •       Type a step description here.         Create:       Notification Request         •       Set Properties	

You can see the result of the above configuration here.

## Auto-dismiss Alert Notifications

This provision allows user to decide if they want an alert to auto dismiss once the record moves out of the rule/condition defined while configuring an alert. This is only applicable for the following alert types:

- Rule-based Alerts
- Even-based Alerts

### **Rule-based Alert:**

Let's consider a scenario where user wants an alert to auto dismiss once the account record moves out of 'My Active Accounts' entity view.

### **Steps to Auto-dismiss Alerts**

1) Create a new alert of type **'Rule Based'** and define the rule mode as **'Simple'** with a view as **'My** Active Accounts'.

Rule based alert		:
General Related		
Name	* Rule based alert	
Alert Type	* Rule Based	
🛱 Entity Configuratio	n * 团 account	
Rule Mode	' Simple	
View *	My Active Accounts *	

# 2) Add a message to this alert.

Rule based alert Alert	um um Deux
General Related	
A Entity Configuration * 🔞 account	
Rule Mode * Simple	
View* My Active Accounts *	]
Interval	
Poll Interval X Hour(s)	Interval 2
Messages	+ New Message 🖒 Refresh 🗐 Run Report 🗸 🗄
✓ Name ∨ Message Text ∨ Alert As ∨ Display As	✓ Alert Level ✓ Process Start Date ✓ Process End Date ✓ Add New Message missi ✓ Create
	Add a related Message to this record.
4	•

# 3) Set 'Auto Dismissible' as 'Yes'.

ule based alert - My Active Accounts - Saved Accounts - Saved S						in an Taon ao amin' a	0	~
General Notification R	elated $\vee$							
		⇒≣ 11	≣ <u>∃</u> ⊗ °;	o <del>**</del> ■ M ¶4 <sup>5</sup> ° &	≣- ◊	?		
Language *	English *							
	2							
Notification Configuration								
Alert Ac *	Form Notification $ imes$		Display As	* Dialog				
ALLES	Select or search options	$\sim$	Alert Level	* Information				
Display Until		$\sim$						
Is Dismissible	Yes							
Auto Dismissible	Yes							

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4) Navigate to Accounts → My Active Accounts → Open any record. Here, an alert will be displayed as a Form dialog post opening the record and it will continue showing up as long as it satisfies the rule defined in the alert configuration i. e. 'My Active Accounts'.

<b>Dynamics 365</b>	iales Hub	Alerts4Dynamics	e ×
=	← 🖾 Show Chart 🗯 Focused view + New 📋 Delete   ∽	Search	QX
Home     Recent	My Active Accounts ~	All 🚫 Critical 🔥 Warning	() Information
S Pinned ∨	⊖ ອື່ອ Account Name ↑ ∽ M	A Datum Fabrication	
My Work	A Datum Fabrication	<ul> <li>Iess than a minute ago</li> <li>A Datum Fabrication active account alert notification</li> </ul>	×
🖉 Sales accelerator	A Datum PVT LTD		
Activities	A. Datum Corporation 4		
📅 Dashboards	Adventure Works		-
Customers	Alpine Ski House 2		
Accounts	Fabrikam, Inc. 4		-
A Contacts	Eyzher Technologies		
Sales	Jack Smith Production House		-
& Leads	Northwind Traders 6		
Opportunities	Sales Account		-
S Sales	1 - 11 of 11		Dismiss All

#### 5) Now deactivate this account record so that it will move out of 'My Active Accounts' entity view.

$\leftarrow$	<b>~</b>	Show Chart	🖉 Edit	🖪 Activate	Deactivate	e 🛍 Delete 🗸	🗞 Promote	🗱 UnLink	┾ Merge	🛃 Open Org Chart
	My Active Accounts $\sim$			2	Deactivate					
	,					Deactivate these Accounts				
~	<b>'</b>	Account Nam	e↑ ∨			You can reactivate these A	ccounts from the Ir	nactive Accounts V	iew.	Primary Contact $\checkmark$
	Α.	1050 Octore	Norfford			943 225 200		iddhcheid		Seeha Tillou
		12555						-		
	A	SV laintan				659.255-087		iddicfield		
								-		
~	/	A Datum Fa	brication			303-555-0135	D	enver		
		A Datas P	a ao				-			
		Ale					-			
		alast					-			
		Angle								

	(415) 555-9933	Middlefield	Sasha Tille
Confirm Deactivation			×
Do you want to deactiv	ate the selected 1 Accour	nt? You can reactivate it la	ater, if you
This action will set the A continue to reference th	Account as inactive. There nese inactive records.	may be records in the sy	ystem that
		Deactivate	Cancel

6) Once deactivated, a record is moved from 'My Active Accounts' view to 'Inactive Accounts' which means it no more satisfies the rule ('My Active Accounts') defined in the alert configurations. As soon as this happens, the alert will be auto dismissed in about 5-10 seconds. So now, if we switch to 'Inactive Accounts' view and open the account record, you will no longer see an alert. (Note: It might take a while for an alert to get auto dismissed.)

Inactive Accounts $\checkmark$							
✓ Account Name ↑ ∨	Primary Contact $\checkmark$	Main Phone $\checkmark$ Address 1: City $\checkmark$					
A Datum Fabrication		303-555-0135 Denver					
How Activate & Open Org Chart & Connect   < A, Assign I Email a Link I Delete C Refresh I Process < G Geo Code I Share :     Read-only This record's status Inactive     Acount - Account -							
ACCOUNT INFORMATION	Timeline + 🏹 🗉 :	Primary Contact					
Account Name*	$\checkmark$ Search timeline						
A Datum Fabrication	Enter a note	CONTACTS :					
Phone 303-555-0135	Auto-post on A Datum Fabrication						
Email		No data available.					
F== TUDIONE							
Website							

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### **Event-based Alert:**

Let's consider that the user wants to create an alert notification to be shown when the value of a 'Subject' field of the case record changes. And later, user wants this alert to auto-dismiss once the case is resolved.

#### **Steps to Auto-dismiss Alerts**

1) Navigate to Advanced Settings  $\rightarrow$  Settings  $\rightarrow$  Process  $\rightarrow$  New Process.







2) Select category as **'Workflow'** and choose the Entity  $\rightarrow$  Click on **OK**.

Create Process Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.							
Process name: *	Auto Dismiss alert for case						
Category: *	Workflow 🗸	Entity: *	Case	~			
🗹 Run this workflo	Run this workflow in the background (recommended)						
We recommend usin	g Microsoft Flow instead of background	workflows. <u>Click here</u> to st	art building Flows!				
Туре:	New blank process New process from an existing tem	plate (select from list):					
Template	e Name ↑	Primary Enti	ty	Owne			
				-			
4				•			
Properties							
			ОК	Cancel			

3) Go to **'Record fields change'**  $\rightarrow$  Select the field **'Subject'** from the list.

File       Save and Close         Process: Auto Dismiss ale         Image: Information         Audit History         Entities         Entities         Notify Workflow Failure         User Adoption Entity         Agent script steps         Macro Run Histories         Catalog Assignments         Workflow Triggers         Messages         Chatbot subcompone         Process Sessions	Activate       Convert to a real-time workflow       Show Dependencies       Solution Lay         ert for case       Instead of background workflows. Citck here to start building Flows!         General       Administration       Notes         • Hide Process Properties       Process       •         Process Name*       Auto Dismiss alert for case       •         Activate As       Process       •         Autitable to Run       As a on-demand process       •         As a child process       Workflow Job Retention       Automatically delete completed workflow jobs (to save disk space)         Add Step • Select this row and click Add Step.       Select this row and click Add Step.	ayers میکرداons ►  Entity Case Category Workflow  Options for Automatic Processes Scope Organization Start when: Record is rested Record status changes Record is assigned Record is deleted
Select F	ields Ids that the process will monitor for changes.	×

	Display Name 🔺	Name	Type Option Sec
	Sentiment Value	sentimentvalue	Floating Point Number
	Serial Number	productserialnumber	Single Line of Text
	Service Level	contractservicelevelcode	Option Set
	Service Stage	servicestage	Option Set
$\Box$	Severity	severitycode	Option Set
$\Box$	SLA	slaid	Lookup
	Social Profile	socialprofileid	Lookup
$\Box$	Status	statecode	Status
	Status Reason	statuscode	Status Reason
	Subject	subjectid	Lookup
0	UpSell Referral	int_upsellreferral	Two Options

4) Create a notification request record to create an alert.

III Power Apps								
File	🖳 📔 🛑 🖸 Activate 🛛 🔚 Convert to a real-time workflow 🛛 📽 Show Dependencies 🛛 🗧 Solution Layers 🔥 Actions 🗸							
Process: Auto Dismiss ale	Process: Auto Dismiss alert for case          Image: State of the state of							
We recommend using Microsoft Flow	ow instead of background workflows. <u>Click here</u> to start building Flows!							
▲ Common	General Administration Notes							
Information ☑ Audit History	✓ Hide Process Properties							
Entities	Process Name* Auto Dismiss alert for case Entity Case							
Entities	Activate As Process Category Workflow							
B User Adoption Entity	Available to Run Options for Automatic Processes							
Agent script steps	Run this workflow in the background (recommended) Scope Organization	~						
Macro Run Histories	As a on-demand process Start when: Record is created							
Catalog Assignments	As a child process							
K Workflow Inggers	Workflow Job Retention							
2 Messages	Automatically delete Completed Workflow Jobs (to save tisk space)							
Messages								
🍙 Chatbot subcompone								
▲ Process Sessions	Add Step + ] = anset - X Delete this step.							
Process Sessions	Stage 🔺							
	Check Condition							
	Conditional Branch							
	Default Action							
	Wait Condition							
	Parallel Wait Branch							
	Create Record Im							
	Action Barond Create Record							
	Send Email							
	Start Child Workflow							
	Perform Action							
	Change Status							
	Stop Workflow							
Status: Draft	Inodic/InoLink/Workflows (1.0.0.0)							

# 5) Select 'Notification Request'.

File 🛃 🛃 Save and Close	🚇 🛛 🖉 🗘 Activate 🗧 🔚 Convert to a real-time workflow 🛛 🖷 Show Dependencies 🛛 🚆 Solution Layers 🔥 Actions 🗸							
Brocoss: Auto Dismiss alor	t for case							
	₹ 1. Information							
We recommend using Microsoft Flow	instead of background workflows, <u>Click here</u> to start building Flows!							
₄ Common	General Administration Notes							
The second secon								
Audit History	Process News # Auto Dirmicr slart for cara							
A Entities	Process Name · Add Distribus alex for date Entity	Case						
Notify Workflow Failure	Activate As Piocess Category	Workflow						
B User Adoption Entity	Available to Run Options for O	or Automatic Processes						
Agent script steps	Scope	Organization 🗸						
Macro Run Histories	As a child process	Record is created						
Workflow Triggers	Workflow Job Retention	Record status changes						
Messages	Automatically delete completed workflow jobs (to save disk space)	Record is assigned						
🖂 Messages		Record fields change Select						
Messages		Record is deleted						
Chatbot subcompone								
Process Sessions     Process Sessions	Add Step ▼   ∰=Insert ▼ X Delete this step.							
	Alert on change of field value							
	Create: Notification   Set Properties							
	Notification Field							
	Notification remplate Lo							
	Notification Template Notification Request							
	Omnichannel Configuration							
	Omnichannel Personalization Omnichannel Queue (Deprecated)							
	Omnichannel Request							
	Ongoing conversation							
	Operating Hour							
	Opportunity Line Detail (Deprecated)							
	Opportunity Line Resource Category (Deprecated) Opportunity Line Transaction Category (Deprecated)							

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6) Click on 'Set Properties'.

Power Apps								
File	🖳   🏮   🔕 Activate   🚍 Convert to a real-time workflow   🍕 Show Dependencies   🚆 Solution Layers 👌 Activate -							
Process: Auto Dismiss ale	Process: Auto Dismiss alert for case							
We recommend using Microsoft Flor	y instead of background workflows, <u>Click here</u> to start building Flows!							
	General Administration Notes    Hide Process Properties							
Entities     Entities     Notify Workflow Esilves	Process Name*         Auto Dismiss alert for case         Entity           Activate As         Process         Category	Case Workflow						
User Adoption Entity	Available to Run Options for .	Automatic Processes						
<ul> <li>Agent script steps</li> <li>Macro Run Histories</li> <li>Catalog Assignments</li> </ul>	As a child process     Start when:	Organization   Record is created  Record status changes						
Workflow Triggers Messages Messages	Workflow Job Retention Automatically delete completed workflow Jobs (to save disk space)	Record is assigned						
Messages		Record is deleted						
▲ Process Sessions Process Sessions	Gradd Step +   → uinsert + X Delete this step.							
	Create: Notification Request							

7) Perform the dynamic field selection as required.

Notification Request: Ne	w Notification Request - Microsoft Dynamics 365 - Google Chr	ome				-		×
ipsummittrial.crm8.	dynamics.com/SFA/Workflow/entityform.aspx?workflo	wld=62eb2c2d-19c3	-490c-a023-	-1c597b260f71&entityname=ikl_notificati	onrequ	est&activityname=Cr	eateSte	p1
File Save and Close							0	<u>H</u> elp +
Process: Auto Dism	iss alert for case							
Create Notifica	ition Request							
Notification Settings					-	Form Assistant		>
Name *	Auto dismiss event based alert for case					Dynamic Values		~
Message Text					=	Dynamic Values		-
Message Rich Text						Operator:		
Alort As					-	Set to		~
Alert As			_	-	- 1	Case		~
Pop-Up	○ No ○ Yes	Email Notification	⊖ No	⊖ Yes	- 1	Case Title		~
Form Notification	○ No ○ Yes	Is Dismissible	⊖ No	⊖ Yes		Add Add		
Display As	~	User Preference	⊖ No	⊖ Yes		XIII		
Alert Level *					~			
Display Until								
Regarding	(Case(Case))							_
Notification Associated With					=	Default value:		
*	L							

8) To display alert on the case record, set the 'Notification Associated With' as shown below:

File Save and C	lose				
Create Notif	ismiss alert for case fication Request				
Notification Setting	gs				Form Assistant
Name *	Auto dismiss event based alert for case				Dynamic Values
vlessage Text	{Case Title(Case)} is active				Dynamic Values
vlessage Rich Text					Operator:
Alert As					Set to
200-Un		Email Notification			Case
orm Notification		Is Dismissible			Record URL(Dynamic)
Display As	Dialog	V Hear Preference			Add
ispidy As	Dialog	- Oser Preference			X   🖈 👎
llert Level *	Information				Record URL(Dynamic)(Case)
Display Until					2
legarding	(Case(Case))				
Notification Associated W * Audience Settings	/ith				OK
Notification Associated W * Audience Settings File Save a	and Close				OK
Notification Associated W   Audience Settings  File  Process: Au  Create N  Notification Set Name *	and Close uto Dismiss alert for case <b>Jotification Request</b> ettings	ert for case			OK
Audience Settings  File  Process: Au  Create N  Notification Set Name *  Message Text	and Close uto Dismiss alert for case <b>Jotification Request</b> ettings Auto dismiss event based all (Case Title/Case)) is active	ert for case			OK
File Save a Process: Au Create N Notification Se Name * Message Text Message Text	and Close uto Dismiss alert for case <b>Jotification Request</b> ettings [Auto dismiss event based al [Case Title(Case)] is active	ert for case			
Audience Settings File Process: Au Create N Notification Se Name * Message Text Alert As	and Close uto Dismiss alert for case <b>Jotification Request</b> ettings Auto dismiss event based al (Case Title(Case)) is active	ert for case			
Audience Settings  File  File  Process: Au Create N  Notification Se Name *  Message Text Message Rich Text Alert As Pop-Up	and Close uto Dismiss alert for case <b>Jotification Request</b> ettings Auto dismiss event based al [Case Title(Case)] is active	ert for case	Email Notification	No Yes	
Audience Settings  File  Process: Au Create N Notification Set Name * Message Text Message Rich Text Alert As Pop-Up Form Notification	and Close and Close Jotification Request ettings Auto dismiss event based al [Case Title(Case)] is active No Yes No Yes	ert for case	Email Notification Is Dismissible	No Yes No Yes	
Audience Settings File Process: Au Process: Au Create N Notification Set Name * Message Text Message Rich Text Alert As Pop-Up Form Notification Display As	and Close Jot Dismiss alert for case Jotification Request ettings Auto dismiss event based al (Case Title(Case)) is active No Yes No Yes Dialog	ert for case	Email Notification Is Dismissible User Preference	○ No ○ Yes ○ No ○ Yes ○ No ○ Yes ○ No ○ Yes	OK
Notification Associated W	and Close Jotification Request Jotification Request Auto dismiss event based al [Case Title(Case)] is active No Yes No Yes Dialog Information	ert for case	Email Notification Is Dismissible User Preference	No ○ Yes ○ No ○ Yes ○ No ○ Yes ○ No ○ Yes	
Intification Associated W   Audience Settings	and Close Jotification Request Jotification Request Auto dismiss event based all [Case Title(Case)] is active No Yes No Yes Dialog Information	ert for case	Email Notification Is Dismissible User Preference	<ul> <li>No ○ Yes</li> <li>No ○ Yes</li> <li>No ○ Yes</li> <li>No ○ Yes</li> </ul>	

9) After creating an alert, now add a **'Wait'** condition which will wait till the case is resolved.

Save and Close	🖳   🎚   🛇 Activate   🔚 Convert to a real-time workflow   🖏 Show Dependencies   🚆 Solution Lay	ers 🐴 <u>A</u> ctions <del>-</del>	
Process: Auto Dismiss ale	ert for case		
recommend using Microsoft Flo	w instead of background workflows, <u>click here</u> to start building Flows!		
Information			
Audit History Entities	Process Name * Auto Dismiss alert for case	Entity	Case
Notify Workflow Failure	Activate As	Category	Workflow
User Adoption Entity	Available to Kun	Options for A	utomatic Processes
Agent script steps	As an on-demand process	Scope	Organization
Catalog Assignments	As a child process	Start when:	Record is created     Perord status changes
Workflow Triggers	Workflow Job Retention		Record is assigned
Messages	Automatically delete completed workflow jobs (to save disk space)		Record fields change Select
5 Messages 7 Messages			Record is deleted
Chatbot subcompone			
ocess Sessions	Add Step 👔 🖓 Hinsert + 🗙 Delete this step.		
Process Sessions	Alert on More ield value		
	Create: Notification Request V Set Properties		
Bower Apps			
rower Apps			
e 🗟 🗟 Save and Close	e 🖳 📔 🕼 Activate 🛛 📰 Convert to a real-time workflow 🛛 🖷 Show Dependencies 👘 🚆 Solution	Layers <u>hA</u> ctions +	
Process: Auto Dismiss a	alert for case		

We recommend using Microsoft Flow	instead of background workflows. <u>Click here</u> to start building Flows!	
4 Common	General Administration Notes	
₹. Information		
Audit History		
👌 Entities	Process Name* Auto Dismiss alert for case Entity Case	
à Entities	Activate As Process Category Workflow	
Notify Workflow Failure	Available to Run Ontions for Automatic Processes	
S User Adoption Entity	Run this workflow in the background (recommended)	
Agent script steps	As an on-demand process	
Catalan Assimutes	As a child process Start when:	
Workflow Triggors	Record status changes	
Messages	Workstow Job Retention Record is assigned	
Messages	Automatically delete completed workflow jobs (to save disk space)	
Messages	Record is deleted	
A Chatbot subcompone		
4 Process Sessions	Add Sten + 1 Helineet + X Delete this sten.	
Process Sessions		_
	Charl Condition	
	Creck control tes	
e	Default Action	
	Detail Action	
	war condition	
	Wait Condition	
	Create Record	
	Update Record	
-	Assign Record	
	Send Email	
	Start Child Workflow	
	Perform Action	
	Change Status	
	Stop Workflow	_

Let's further configure the condition.

P a g e 107 of 132

We recommend using Microsoft Elo	winstead of background workflows. Click by	are to start building Flows!			
Common  Information  Auti History  Entities  Notify Workflow Failure  Agent script steps  Actalog Assignments  Catalog Assignments  Catalog Assignments  Macro Run Histories  Mac	General     Administration     Notes <ul> <li>Hide Process Properties</li> </ul> Process Name * <ul> <li>Auto Dismis</li> <li>Activate As</li> <li>Process</li> </ul> Available to Run <ul> <li>Run this workflow in the backg</li> <li>As an on-demand process</li> <li>As a child process</li> <li>Workflow Job Retention</li> <li>Automatically delete completed</li> </ul>	s alert for case		Entity Category <b>Options for A</b> Scope Start when:	Case Workflow utomatic Processes Organization Record is created Record status changes Record fields change Record fields change Record is deleted
trocess Sessions	Add Step • ] ∃≪linsert • ★ De  Alert on change of field value Create: Notification Reques  • (Wait until the case is resolved Wait until decond itons (click) Select this row and clic	iete this step.			
File Save and Clo	se				
✓ <u>Case</u>	Status	Equals	Resolved		
✓ <u>Case</u> Select	<u>Status</u>	Equals	Resolved		

10) To auto-dismiss the alert once the case is resolved, select the row and add a new step as shown below:
| Alerts4Dynamics – User Manual   |  |  |  |  |  |  |  |
|---|--|--|--|--|--|--|--|
| File Save and Close Process: Auto Dismiss ale T. Information  | 🚇   🔮   O Activate   🔜 Convert to a real-time workflow   🛱 Show Dependencies   ≣ Solution Layers 🎪 Actions →   |  |  |  |  |  |  |
| We recommend using <u>Microsoft Flow</u> Common  Information  Audit History  Entities  Notify Workflow Failure  User Adoption Entity  Agent script steps  Macro Run Histories  Catalog Assignments  Workflow Triggers  Messages  CMessages  CMess | Instead of background workflows.         General       Administration         Vectors       Notes         Process Name *       Auto Dismiss alert for case         Activate As       Process         Process Name *       Auto Dismiss alert for case         Activate As       Process         Run this workflow in the background (recommended)       Options for Automatic Processes         Scope       Organization         As a non-demand process       Scope         As a child process       Start when:         Activate Automatically delete completed workflow jobs (to save disk space)       Record is assigned         Automatically delete this step. <ul> <li>Alet on change of field value</li> <li>Alet on change of field value</li> <li>Step of field value</li> <li>Alet on change of field value&lt;</li></ul> |  |  |  |  |  |  |
|   | Create: Notification Request  Visit Properties Visit until the case is resolved Visit until Case-Status equals [Resolved], then: Select this row and click Add Step.   |  |  |  |  |  |  |

11) Select the below assembly from the list for auto dismissing the alert notification.

Image: Several data between and Section and Secting and Secting and Secting and	-			
Process team of the set of the se	File	Activate Convert to a real-time work	kflow 🛛 🖷 Show Dependencies 👘 📑 Solution Layer	yers 👌 Actions •
We recommend using Monzach Base Instant of Bases         Common       General         In drift History       I drift History	Process: Real and Rea	ana alik fasiringi		Working on solution: D
Common     Central     Addition     Add	We recommend using Microsoft Flow	instead of background workflows. <u>Click here</u> to start building Flow	ws!	
Invoices InogicAterta/Dynamics.Workflows.RegisterAuto Microsoft.Dynamics.Service.Workflows.Contr > InogicAterta/Dynamics.WorkFlows.SengEmailNo Geth/ChangedSkils > InogicAterta/Dynamics.WorkFlows.SengEmailNo InogicAterta/Dynamics.WorkFlows.SengEmailNo InogicAterta/Dynamics.WorkFlows.SengEmailNo	Common     Constantion     Audit History     Catalog Assignments     Entities     Agent script steps     Agent script steps     Maco Run Histories     Workflow Triggers     Workflow Triggers     Messages     Chattot subcompone      Process Sessions     Process Sessions	General Administration Notes	DismissNotification     Inogic.Alerts4Dynamics.WorkFlows.AdDConfigur     Inogic.Alerts4Dynamics.WorkFlows.AdDConfigur     Inogic.Alerts4Dynamics.WorkFlows.AdDConfigur     Inogic.Alerts4Dynamics.WorkFlows.AdDConfigur     Inogic.Alerts4Dynamics.WorkFlows.AdDConfigur     Inogic.Alerts4Dynamics.WorkFlows.AdDConfigur     Inogic.Alerts4Dynamics.WorkFlows.CreateAndDell     Inogic.Alerts4Dynamics.WorkFlows.CreateAndDell     Inogic.Alerts4Dynamics.WorkFlows.Notification.P     Inogic.Alerts4Dynamics.WorkFlows.Notification.P	Entity Care Category Workflow Options for Automatic Processe Scope Grainization Start where Grainization Encord status changes Record status changes Record is assigned Record is deleted Select
	Status: Draff	Invoices Microsoft.Dynamics.Service.Workflows.Contr GetMyChangedSkills	Inogic Alerts4Dynamics. WorkFlows. Register Auto Inogic Alerts4Dynamics. WorkFlows. SendEmailNo Inogic Alerts4Dynamics. WorkFlows. SerNextRunTi Inogic Alerts4Dynamics. WorkFlows. Unregister Aut	

12) Click on 'Set Properties'.



13) Select the below option from the list for **'Look for'** field. This is a first step description that was added to create a notification request record.

File Save and Close							, <sup>3-b6e5</sup>	-c6530961883f#	
Process: Auto Dismi	iss alert for case p Input Properties				Working on solution: Defa	ult Solution	rkflow	Show Dependencies	Solution Layers
Property Name	Data Type	Required	Value		Form Assistant	>			
Notification Request	Lookup	Required			Dynamic Values Dynamic Values	×			
4				,	Operator: Set to Look for: Case IoT Alert (IoT Alert) Knowledge Base Articl Last SLA applied (SLA) Master Case (Case) Modified By (Delegat Modified By (Dele	e (Article) ) (User) Party) (Extern (Business Uni PI Instance) Contact) rofile) d volve (Notifi	al Party) t)	mics.WorkFlows.No	ntificationRequest.Dismit
					FIDLESS	Alert o	n change	e of field value (Notification	Request)

14) Click on 'Add'.

E. Sa d Ch

File Save and Close				Ø	<u>H</u> elp <del>•</del>
Process: Auto Dismis Set Custom Step	s alert for case D Input Properties	;		Working on solution: Default So	ution
Property Name	Data Type	Required	Value	Form Assistant	>
Notification Request	Lookup	Required		Dynamic Values Dynamic Values	*
				Operator: Set to Look for: Alert on change of field value (N Activity Add Default value: OK	

# 15) Click on **'OK'**.

File Save and Close					<u> </u>
Process: Auto Dismis Set Custom Step	ss alert for case p Input Properties	;		Working on solution: D	efault Solution
Property Name	Data Type	Required	Value	Form Assistant	>
			м	Dynamic Values	~
Notification Request	Lookup	Required		Dynamic Values	<b>^</b>
				Operator:	
				Set to	$\sim$
				Look for:	
				Alert on change of fiel	d value (Not 🗸
				Activity	~
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				Activity(Alert on chang	e of field val 🔺
					-
				Default value:	
					Q
				ОК	ł

File Save and Close				<u> </u>
Process: Auto Dismis	ss alert for case p Input Properties	5		Working on solution: Default Solution
Property Name	Data Type	Required	Value	Form Assistant
Notification Request	Lookup	Required	{Activity(Alert on change of field v	Dynamic Values
			This list contains	1 records.
				Look for: Alert on change of field value (Not V
				Activity  Add
				X 🗎 单 📮
				Activity(Alert on change of field val
				Default value:
				ОК

# 16) Click on **'Save and Close'**.

File Save and Close				<mark>⊘</mark> Help ◄
Process: Auto Dismiss Set Custom Step	alert for case Input Properties	;		Working on solution: Default Solution
Property Name	Data Type	Required	Value	Form Assistant
Notification Request	Lookup	Required	{Activity(Alert on change of field v	Dynamic Values
			This list contains 1	records.     Look for:     Alert on change of field value (Not >     Activity     Add     Add     Add     Activity(Alert on change of field val     Default value:     OK

17) Next, activate the workflow.



Process Activate Confirmation Do you want to activate the selected 1 Process?	×
This action will attempt to activate the Process you have selected.	ch: gne cha
	:tec
Activate Set Properties	Cancel

18) Navigate back to **Case**  $\rightarrow$  **Open** a case record  $\rightarrow$  **Change** the value of the field **'Subject'**.

Sa	les Hul	b				م
	$\leftarrow$	🛱 Show Chart 🕂 New Case 🛍 Delete	e 🗸 🗸 Refresh	🔟 Run Report 🗸	ାର୍ଚ୍ଚ Email a Lin	<
•	A	Active Cases ~				
	~	Case Title $\uparrow$ $\checkmark$	Case Number $\vee$	Priority $\checkmark$	Origin $\checkmark$	Customer ∨
		Average order shipment time $\begin{tabular}{c} \begin{tabular}{c} \b$	CAS-01213-P8B3X0	Normal	Web	Ultere
		Central details repeated	06-02/5-00/12	Normal	Cmail	A Others
		Colomer Centert Information	OK-11216-US772	Normal	Cmail	the tender wheel
		Delivery nover actived	06-828-88994	low	Phone	Alpha dia Massa
		Instantional Down Lastop Redmand XHS	O6-885-V8010	Normal	946	couples theory institute
		Sealty product catalog	GIS-IP228-58088	Normal	Cmail	Routhcollee
		hearset product information online	045-89222-062300	High	Cmail	Ultere
		internation on the product	06-8223-29191	low	Cmail	consolutional Meetings
		tem delective on delivery	OS-825-8114	High	Taittor	Reletion Inc.
		Maintenance information for Desktop PCs	CAS-14225-007162	low	<b>Email</b>	North College

19) Change the subject from 'Delivery' to 'Query'.

Average order shipment time Case · Case ∨								
Phone to Case Process Active for 29 days	Ide	entify						
Summary Case Relationsh Case Title *	nips Associated Knowl Average order shipm	edge Records Enhanced SLA Details						
A ID	CAS-01213-P8B3X0	Enter a note						
Subject	Delivery	Call the customer with relevant in Schedule an appointment with th Active						
Customer	C Lines	😝 🗟 Auto-post on Average order						
Origin	Web	Case: Created by						
Priority	Normal							

		Alerts4Dynam	ics – User Manual		
AO Average C Case · Case	order shipment ti	ne		Normal Priority	1/20/2017 10:50 PI Created On
Phone to Case Process Active for 29 days	<	Identify		Research (29 D)	
Summary Case Re	elationships Associa * Average order s CAS-01213-P8E	ted Knowledge Record hipm 3X0	s Enhanced SLA Details arcn timeline note	Additional Details	Social Details
Subject Customer	Query * 🔁 Litware		Call the customer with relevant Schedule an appointment with Active	information the customer. Capture pr 9/6/2020 8	elimin 31 PM V
Origin	Web		'중 Auto-post on Average ord Case: Created by Constant Case	er shipment time for Accou	unt Lit :30 PM ∨

20) Click on 'Save'.

$\leftarrow$		🛱 Save & Close	」→ Save & Route	+ New	🔚 Save	$\mathcal{R}_{\star}$ Create Child Case			
A		Average order Case → Case →	Save	e (CTRL+S) e this Case.					
Phor Activ	Phone to Case Process        Active for 29 days								
Sur	nmar	y Case Relation	ships Associated	d Knowled	ge Records	Enhanced SLA Detail			
	Case	Title	Average order shi	pm	≁ sea	rcn timeiine			
-   -	<del>Ч ID</del>		CAS 01212 D002)	(0	Enter a no	ote			
			CA3-01213-P0B3/		CG <sup>®</sup>	Phone Call from			
	Subj	ect	Query	$\sim$	S	Call the customer with relevant Echedule an appointment wi			
	Cust	omer ,	(S Lines						
	Orig	in	Web		¢ (	Case: Created by			

21) Once saved successfully, an alert will be shown as a **Dialog** on the case record. It will continue showing up until the case is resolved.

Sales Hub						Alerts4Dynamics			e ×
$\leftarrow$	<sup>13</sup> Save & Close	」→ Save & Route + New [	🔚 Save 🖞	L+ Create Child Case	🖪 Resolve Case 🛛	Search			Q ×
Â	Average or	rder shipment time				All	🚫 Critical	🕂 Warning	() Information
Phone t Active fo	Case · Case ∨ to Case Process or 29 days	< Ide	entify Resea			Average order shipment time     a minutes ago     Average order shipment time is active			×
Summ	Case Relationships Associated Know			ds Enhanced SLA	Details Additional				
C	Case Title	* Average order shipm	∠ Se	earch timeline					
A II	D	CAS-01213-P8B3X0	Enter a	Enter a note					
S	ubject	Query	SS	Auto dismiss event ba	ased alert for Case				
C	lustomer	1 S Linese	60	Call the customer wit	hereite the Barryte I				
C	Drigin	Web		Call the customer with relevant information Schedule an appointment with the customer. Active					Dismiss All

22) Now, let's mark this case record as resolved.

Sales Hub					Q	ଏ
← 🛱 Save & Close ⊥→ S	Save & Route + New	🔚 Save 🥠 Create Child Ca	se 🖪 Resolve Case	Cancel Case	🖺 Ad	ld to Queue
Average order Case · Case ∨	shipment time			Normal Priority	<b>1/20/2017</b> Created On	10:50 PM
Phone to Case Process Active for 29 days	< Id	lentify	Resea	• rch (29 D)		
Summary Case Relations	ships Associated Know	ledge Records Enhanced	SLA Details Additional	l Details S	iocial Det	tails Arti
CASE DETAILS		Timeline		+ 7 I	:	
Case Title *	Average order shipm	$ \mathcal{P} $ Search timeline				
AID	CAS-01213-D8B3X0	Enter a note			0	
	CA3-01213-F0B3A0	SS CNotification	Request from			A
Subject	Query	Auto dismiss eve	nt based alert for Case	11:30	AM $\checkmark$	A
Customer *	(3 street	CG C Phone Call fr Call the custome	om Christe Calles Clauged for r with relevant information	New Control		R



23) Once the case is resolved, the alert is dismissed automatically.

	Alerts4Dyna	amics – User Manu	al			
Read-only This record's status: Resolved						
Average order shipment time			Normal Priority	1/20/2017 10:50 PM Created On	Problem Solved Status	
Aborted after 29 days	fy	A Research (29 D)				
ummary Case Relationships Associated Knowledge Record	s Enhanced SLA Details Additional Det	tails Social Details Articles and Contra	ct Information	Field Service	Related	
CASE DETAILS	Timeline	+ 7	ī≣ :	CUSTOMED D	TAUC	
Case Title * Average order shipment time	✓ Search timeline			COSTOMER DI	TAILS	
ID CAS-01213-P8B3X0	Enter a note		0	🛱 Litware		
	Auto-post on Average orde	er shipment time		🛱 Email	and any places only	
Subject Query	- Case: closed by	11	:38 AM 🗸	🔒 Phone	1401-010-000	
Customer 👎 🔝 🚥	SS & Resolved by			RECENT CASE	5	
Origin Web	Resolved	1	:38 AM 🗸			
	Phone Call from	te Canat-Onto				
Deinsite	Call the customer with relevant	information			No data available.	
Priority Normal	Schedule an appointment with t	the customer. Capture preliminary customer and	produ			
Priority Normal Contact	Schedule an appointment with Closed	the customer. Capture preliminary customer and	970du 138 AM 🗸	Entitlement		

Note: Auto-dismiss feature is not applicable for Announcement and Record-based alert(s) as they do not put on any specific condition/rule unlike Rule-based alerts.

# **Email Digest Workflow**

Once you have completed the <u>Email Digest Workflow configuration</u>, you will be able to receive your desired notifications via email within CRM or in your external email account such as Outlook.

**For instance:** Here we have done the configuration for receiving unread notifications via email in CRM and external email accounts such as Outlook on a daily basis.

## Outlook:

 To view the Unread Notifications in Outlook, go to your Outlook account -> Inbox -> Click on Mail.



• Now all the unread notifications will appear in the email Body.

	Outlook	Q. Search	B 67	ଢ ଦ ⊜ Q (
	= Home View Hel	p		
•	New New New New New	Report Reply Forward all Respond	P Quick steps     Image: Categorize Flag     Image: Finit Snozze Folloy     Image: Finit Snoze Folloy     Image:	
÷	✓ Favorites	Focused Other	Unread;Notifications Email Template CRM:0100001 Tracked To Dym X	
* •	□     Inbox     1       ▷     Sent Items	Unread;Notifications 12:58 PM     Tracked To Dynamics	AS To: Arend Laurent	d   🛓 ⊗ 🕨   🐻   … Wed 2024-08-21 12:58 PM
	Drafts	<ul> <li>Vesterday</li> </ul>	Hi,	
000	Add favorite	> test Tue 7:00 PM Tracked To Dynamics Hi new lead	Below are the unread notifications.         ENTITYLOGICALNAME           MESSAGE         RICHTEXTVALUE         ENTITYLOGICALNAME           New Account is created          account	08/21/2024
	☑ Inbox 1 ℤ Drafts	> MO Test Email Delivery has failed to these recipi	New Account is created          account           New Account is created          account	08/21/2024 08/21/2024
	<ul> <li>➢ Sent Items</li> <li>ŵ Deleted Items</li> <li>Pa lunk Email</li> </ul>	> AS Your mailbox is no Tue 12:54 PM Microsoft Dynamics 365 Mailbox	New Account is created          account           New Account is created          account	08/21/2024 08/21/2024
		> As email 06 CRM:010 Tue 10:34 AM	New Account is created          account           New Account is created          account	08/21/2024 08/21/2024
	Conversation History	MS Microsoft Entra ID P Tue 8:17 AM	Issue Account is created          account           New Account is created          account	08/21/2024

## CRM:

• To view the Unread Notifications in CRM, go to Sales Hub → Activities.

	Dynamics 365	Sales Hub	Try the new look 💽 🔎 🗘 + 🖓 🗐 ? 🗘	54 67	
=		$\begin{subarray}{ccc} \end{subarray} \begin{subarray}{ccc} \end{subarray} \end{subarray} \begin{subarray}{cccc} \end{subarray} \end{subarray} \begin{subarray}{cccc} \end{subarray} \end{subarray} \begin{subarray}{ccccc} \end{subarray} \end{subarray} \begin{subarray}{cccccccccc} \end{subarray} \end{subarray} \begin{subarray}{cccccccccccccccccccccccccccccccccccc$	Source record not selected		
	Home	My work list			
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S :	Sales accelerator				
۱ ۱	Activities				
1 <del>1</del>	Dashboards Activiti	es			
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	Accounts	Activities will appear here			
8	Contacts	Create sequences to populate the work items			
Sales		North St			
¢ I	Leads	Create sequences			
1	Opportunities				
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Colla	teral				
S s	Sales 🗘	0 items Last updated at 10:02 AM			

• Go to "All Activities".

Dynamics 365	Sales Hub				Try the new l	ook 💽 🔎 💡	$+$ $\nabla$	☺ ?	A 10 A	· 💽
=	← 🕼 Show Chart	Search views	Letter	🔒 Fax	🐉 Service Activity	🤝 Campaign Response			🖻 Share 🗸	Ð
Image: Gray bound of the second of the s	My Activities ~ Due All	Activity Agreement Booking Service Tasks View (Deprecated All Activities Closed Activities	i) ①			🖽 Edit columns	√ Edit filters	Filter by key	word	Ģ
My Work Sales accelerator	Activity Type ~	Custom Work Order Service Task View (Deprecated)		Regarding	<ul> <li>Priority `</li> </ul>	Start Date	,	Due Date $\uparrow$ $\checkmark$		
<ul> <li>Activities</li> <li>地 Dashboards</li> </ul>		<ul> <li>My Activities</li> <li>Default</li> </ul>	It							
Customers		My Closed Activities My Team Members' Activities Next Activity								
& Contacts Sales		Portal Timeline View Scheduled Activities	N	lo data availa	ble					
C Leads		Task All Tasks								
		My Tasks Phone Call								
Collateral	0 - 0 of 0	All Phone Calls           Image and share views						14	$\leftarrow$ Page 1 $\rightarrow$	

• Click on the suitable "Email Activity Record."

<b>III Dynamics 365</b> Sa	ales Hub						New loo	ی م <b>ا</b>	+ 7 @ ?	4 & G	R
≡ ⊛ Home	← 6	🗊 Show Chart 📑 Task 🖙	Email 🛗 Meeting	🗞 Phone Call	🗏 Letter 🔒	Fax 🏾 🦻 Service Acti	vity 🥪 Campai	gn Response   箇 Other A	Activities $\vee$ :	<u>ଜ</u> ୨୦	
© Recent ∨ ☆ Pinned ∨ My Work	All A	ctivities ~	Activity Type					Edit columns	♥ Edit filters	Filter by keyword	
Ø Sales accelerator		Subject ~	Regarding ~	Activity Type ~	Activity Sta ~	Owner ~	Priority ~	Start Date ~	Due Date ↑ ~	Primary E 👻	
Activities		Unread Notifications CRM:0		Email	Completed	O herby largers	Normal			Redjimm.	1
과 Dashboards		Intro call with Lavona - Airpo	Lavona Field	Phone Call	Completed	Hardy Lenon	Normal	5/28/2024 9:00 AM	5/28/2024 9:07 AM	HardyLenon	
Customers		First call with Lilly	Lilly Pyles	Phone Call	Completed	Hardy Lenon	Normal	5/29/2024 9:00 AM	5/29/2024 9:14 AM	HardyLenon	
Accounts		Intro call with Winford	Winford Asher	Phone Call	Completed	Hardy Lenon	Normal	5/30/2024 9:00 AM	5/30/2024 9:03 AM	HardyLenon	
X Contacts		Review the final quotation	12 Café A-100	Meeting	Completed	Hardy Lenon	Normal	5/30/2024 2:30 PM	5/30/2024 3:00 PM	HardyLenon	
Sales		Discuss service warranty	2 Café Corto fo	Meeting	Completed	Hardy Lenon	Normal	5/30/2024 6:30 PM	5/30/2024 7:00 PM	HardyLenon	
C Leads		Call with Rachel	Rachel Michael	Phone Call	Completed	Hardy Lenon	Normal	5/31/2024 9:00 AM	5/31/2024 9:12 AM	HardyLenon	
Opportunities     Competitors		Review the final quotation	20 Café A-100	Meeting	Completed	Hardy Lenon	Normal	5/31/2024 3:30 PM	5/31/2024 4:00 PM	HardyLenon	
, competitors		Discuss service warranty	3 Café Grande	Meeting	Completed	Hardy Lenon	Normal	5/31/2024 8:30 PM	5/31/2024 9:00 PM	HardyLenon	
Collateral		Discuss service warranty	2 Café Duo Esp	Meeting	Completed	Hardy Lenon	Normal	5/31/2024 9:30 PM	5/31/2024 10:00 PM	HardyLenon	
Quotes Crders Sales	Rows: 7	Discuss VI soffan machinan 72	Jamaina Barratt	Dhana Call	Comulated	A Undu Lanan	Marmal	C/1 /000 A COCI ALA	CH (2017 0.00 AXA	Undularia	

• Now all the unread notifications will appear in the email Body.

Unread Notifications CRM.0100001       Save & Cose        Reference        © Concert for        © Delete        Image as not yet been submitted for delaways. For more information, see help.         Unread Notifications CRM.0100001 - Saved       © Angely        Reference        © Concert for        © Delete        Image as not yet been submitted for delaways. For more information, see help.         Unread Notifications CRM.0100001 - Saved       © Save & Conce        Reference        © Concert for        © Delete        Image as not yet been submitted for delaways.         Image Related        Image Related         Image Related        Image R	Vurread Notific	ations CRM:010 This record's status ge has not yet beer oly «S Reply all Notifications ail ~ lated ~	Completed a submitted for delivery. → Forward G S CRM:0100001 - Sa	For more information	on, see help. Close 🖒 Refresh	🖏 Check Access	: B∂ Process ∨	🚡 Convert To 🗸	Delete []	Email a Link		E Share ~	×
A Red-only This records status: Completed          Image: Status: Completed         Image: Status: Completed         Image: Status: Completed         Image: Status: Completed         Image: Status: Completed         Image: Status: Completed         Image: Status: Completed         Image: Status: Completed         Image: Status: Completed         Image: Status: Completed         Image: Status: Completed         Image: Status: Completed         Image: Status: Completed         Image: Status: Completed         Image: Status: Completed	Aread-only T This message This message Aread Ar	his record's status pe has not yet beer oly % Reply all Notifications ail ~ lated ~	Completed a submitted for delivery. → Forward 🔛 S CRM:0100001 - Sa	For more information	on, see help. Close 🕐 Refresh	ପ୍ତି Check Access	BJ Process 🗸	📱 Convert To 🗸 🗸	1 Delete	Email a Link :		🖄 Share 🗸	
This nessage has not yet been submitted for delivey. For more information, see help.          Image: State of the state	ecen	ye has not yet beer oly % Reply all Notifications ail ~ lated ~	n submitted for delivery. → Forward 🖬 S CRM:0100001 - Sa	For more information	on, see help. Close 🖒 Refresh	🖏 Check Access	B⊋ Process ∨	📱 Convert To 🛛 🗸	🗊 Delete 🗋	Email a Link		🕼 Share 🗸	
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# **Post Notification**

Post Notification feature allows users to create custom post messages and tag users on the timeline to deliver these messages as notifications to tagged users.

Here's how **Post Notification** feature works:

**Example 1:** A single user is tagged with a common message.

For instance, Lenin, a sales manager, creates a custom post message directly from the timeline of a contact record using the post feature to notify Bob, a salesperson in his organization, to connect with a new contact over the phone simply by tagging him with the message:

- Go to the entity record for which you have configured the post notification feature.
- Here we will go to Contact Record -> Timeline, click on add "+" button, and select 'Post'.



• Tag the user you want to deliver the custom post message to.

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• Type the message and click 'Add Post' to deliver the message as a notification to your desired user.

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- Now the user you've tagged in the message will receive a post notification on the alert panel.
- To see the post notification, login with that user which is mentioned in the post i.e. Bob Smith in our example.

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**Example 2:** Multiple users are tagged with a custom post message.

Suppose, a sales manager wants multiple salespersons to connect with a contact in CRM to provide specialized knowledge and expertise on different aspects of the deal. With post notification feature, he can create a custom post message and tag multiple CRM users directly from the timeline of a contact record to notify salespersons in his organization to connect with the contact.

• Tag the users you want to deliver the custom post message to.

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• Type the message and click 'Add Post' to deliver the message as a notification to your desired users.

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- Now the users you've tagged in the message will receive a post notification on the alert panel.
- To see the post notification, log in with the user who is mentioned in the post.

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**Example 3:** Multiple users are tagged without a custom post message.

For example, Lenin, a sales manager, wants to send a reminder invitation message for the weekly sales meeting every Wednesday at 4 pm without typing the message each time. With the post notification feature, he can set up a message in the workflow. He can then send this reminder to one or multiple users by tagging them on a record's timeline, eliminating the need to type a custom post message every week.

• Tag the users you want to deliver the common message to via workflow.



 Now click 'Add Post' to deliver the message text from the workflow as a notification to your desired users.

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- Now the users you've tagged in the message will receive a post notification on the alert panel.
- To see the post notification, log in with the user who is mentioned in the post.

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Note:

• Similarly, you can tag a single user without a custom post message and deliver a common message set up in the workflow as a post notification, saving you time typing message every time.

**Example 4:** Multiple users are tagged with a custom post message, but a single user is tagged without a message.

For example, Lenin, a sales manager, wants two of his salespersons, Bob and Alice, to set up a client call. Hold Mery, a senior salesperson, responsible for getting the gist of the call from Bob and Alice. With the post notification feature, Lenin can tag Bob and Alice to send a custom post message regarding "setting up the call" and send a workflow message to Mery for getting the gist of the call.

• Navigate to workflow that you had configured earlier (Post Notification Workflow), and set up the workflow message.

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Create Notification Workflow Create Notification Request							
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Name *	Notification for						
Message Text	Hi Mery, please get the gist of the client call from Bob and Alice						
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• Go back to the record and tag the users you want to deliver the custom post message to and type the Message.

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• Now tag the user to whom you want to deliver the message that you have set up in the workflow.

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Note: To type a custom post message, follow the pattern: "@username then message." If you type the message before "@username," then you won't receive the custom message notification in the alert panel. However, if you have already configured a workflow to deliver a common message, your users will receive the message you have set up in the workflow.

 Now click 'Add Post' to deliver the custom post message and workflow message to your desired users.

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Customers	Last Name *	Baker	@Bob Smith @Alice Johnson Please se at 3 PM @Mery	et up a client call with this contact		-		
A Contacts	Job Title	Cafeteria Manager			Assistant			
Sales	Account Name	Trey Resea × 🔎	0	Add post Cancel	Notifications			
© Leads	Email	alex@treyresear 🖂	<ul> <li>Highlights</li> <li>Recent</li> </ul>		No notifications or suggestions			
Opportunities	Business Phone	619-555-0127 🖇	(H) Modified on: 11:58 AM		Check back later to see what's new and sta	ay		
兴 Competitors	Mobile Phone	619-555-0129 🖇	Rest by A Lenin Hard ≤Bob Smith≥	<i>⊂</i> 2 5 Ⅲ	up to date.			
Sales	Fax	619-555-0128	View more	~				

• Now the users you've tagged in the custom post message will receive notifications with the custom post message.

Dynamics 365	Sales Hub			Ner	w look 🌑 🔎	Alerts4Dynamics	e ×
≡ ⋒ Home	← 😕 Foo	cused view 🛛 🕅 Show Chart	+ New 🗊 Delete   🗸 🔘 Ref	esh į	<u>e</u> :	Search	Q X
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	6 <sup>9</sup> a 🗌	Full Name ~	Email ~	Company Name ~	Business Ph × St	12 minutes ago Please set up a client call with th	is contact at 3 PM
Sales accelerator		Heriberto Nathan	heriberto@north	Northwind Traders	614-555-0123	£	
Activities		Dwayne Elijah	dwayne@alpinesk	Alpine Ski House	281-555-0160	£	
靜 Dashboards		Haroun Stormonth	haroun@fabrikam	Fabrikam, Inc.	423-555-0122	¢	
Customers		Kevin Martin	kevin@adatum.co	A. Datum Corpora	425-555-0160	¢.	
Accounts		Miguel Garcia	miguel@northwin	Northwind Traders	614-555-0127	¢	
R Contacts		Zoltán Szabő	zoltan@fabrikami	Fabrikam, Inc.	423-555-0120	A	
Sales		Carla Yates	carla@treyresearc	Trey Research	456-555-0156	£	
😵 Leads		Alex Baker	alex@treyresearc	Trey Research	619-555-0127	A De	
Opportunities		Avery Howard	avery@treyresear	Trey Research	567-555-0137	¢.	
风 Competitors		Kim Rocha	kim@treyresearch	Trey Research	567-555-0157	ł.	
Collateral							
S Sales	Rows: 11						Diemiee All

• To see the post notification, log in with the user who is mentioned in the post.

• Now the users you've tagged without the message will receive a notification on the alert panel with the workflow message.

<b>::: Dynamics 365</b> Sa	iles Hub			New look 🌑 🔎	Alerts4Dynamics	
≡ ŵ Home	← 💾 Foo	used view 🕼 Show Chart 🕂 New	💼 Delete 🛛 🗸 🕐 Refresh 🛛 🗃 Visualiz	e this view 🛛 🖾 Email a Link	Search	Q ×
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My Work	A	Full Name ~	Email ~	Company Name ~	Hi Mery, please get the gist of the client call	from Bob and Alice
Sales accelerator		Heriberto Nathan	heriberto@northwindtra	Northwind Traders		
Activities		Dwayne Elijah	dwayne@alpineskihouse	Alpine Ski House		
業 Dashboards		Haroun Stormonth	haroun@fabrikaminc.com	Fabrikam, Inc.		
Customers		Kevin Martin	kevin@adatum.com	A. Datum Corporation		
Accounts		Miguel Garcia	miguel@northwindtrade	Northwind Traders		
A Contacts		Zoltán Szabó	zoltan@fabrikaminc.com	Eabrikam, Inc.		
Sales		Carla Yates	carla@treyresearch.net	Trey Research		
& Leads		Alex Baker	alex@treyresearch.net	Trey Research		
Opportunities		Avery Howard	avery@treyresearch.net	Trey Research		
R Competitors		Kim Rocha	kim@treyresearch.net	Trey Research		
S Sales	Rows: 11					Dismiss All

# Alerts4Dynamics Logsbeeb

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  $\rightarrow$  Alerts4Dynamics Logs.

ය Home	Active Logs $\vee$		🖽 Edit columns 🛛 🍸 Edit filters	Filter by keyword
<ul> <li>L Recent</li> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> </ul>	Entity Name ~	Process ~	Entity Schema Name 🗸	Created On $\downarrow$ $\checkmark$
Alerts4Dynamics		CreateNotifications		11/12/2022 2:3
🗘 Alerts		CreateNotifications		11/12/2022 8:0
M Entity Configurations		CreateNotifications		11/12/2022 4:0
Message Texts		CreateNotifications		11/12/2022 12:
Notifications     Alerts4Dynamics Logs		CreateNotifications		11/11/2022 8:0
Configurations		CreateNotifications		11/11/2022 4:0
License Registration		CreateNotifications		11/11/2022 4:0

# **Notify Failure Configuration**

Notify failure will notify the defined users in '**Notify Failure'** setting if there are any failure during creation of notification like incorrect configuration or other similar reasons.

If there are any notification failures, then daily a mail will be sent out to the defined users in the setting.

Given below is the step to enable notify failure:

When the user clicks on the **'Activate'** button on License Registration form, **'Configuration Record'** is automatically created and becomes visible under **'Configuration'** entity of Alerts4Dynamics.

After the creation of that record, user can set the Notify Failure (two Options field) value **Yes** or **No** in that record.

By default the field is set as 'No', which means no notification mails about the error logs will be sent.

A4D Configuration	
General Notify Failure	Related
Notify Failures	Νο

When **'Yes'** option is selected, user can see two fields **'To'** and **'From'** which defines to whom the error logs will be send and from whom they will receive the error logs. Here, the error logs contain all the failures in Alerts4Dynamics process and its details in a table format. The error logs will be sent daily at **12:00** am to users mentioned in **'To'** field.

A4D Configuration Configuration		
General	Notify Failure	Related
Notif	y Failures	Yes
From	*	Jane Doe 🔻
To *		× John Watson

# Contact Us

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