White Paper

Aim:

Alerts4Dynamics is a productivity app for assisting managers to create and manage alerts in Dynamics 365 CRM.

Alerts4Dynamics alerts the users with relevant information that the manager wants to update them with.

Features:

- Provision to create more engaging messages with all kinds of text formatting using Message Rich Text
- Supports OOB as well as Custom Entities
- Create Announcements and Rule-Based/Record Based/Event Based alerts
- Alerts can be viewed as pop-ups, form notifications or sent as emails 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 a 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 the 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 the Notification panel
- Create custom post messages and tag users on the timeline for notifications
- Receive daily, weekly, or monthly email digests of unread and read-not-dismissed alerts

Supported Versions

Versions: Microsoft Dynamics 365 v9.x and above, Dataverse (Power Apps).
Deployment Models: On-Premises and Online.

Who needs it?

Alerts4Dynamics enables managers in Dynamics 365 CRM to create and schedule alerts for users. This notifies the users with the information they need to be updated within their CRM. It allows the users to stay active and be in sync with the entire business process by being up-to-date with their ongoing process, deals and external factors that may have an influence on their strategy.
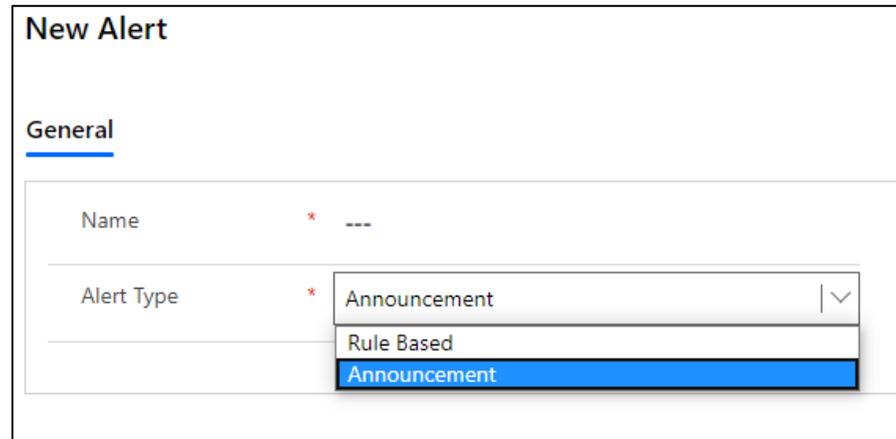
Entity Configuration

Entity Configuration is automatically created for selected Entities from License Registration Page.

Alert Types

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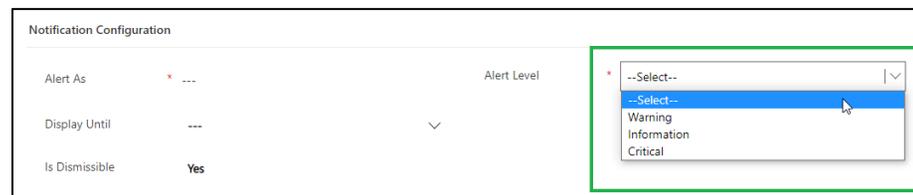

Alert Level

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

Define Mode of Alert

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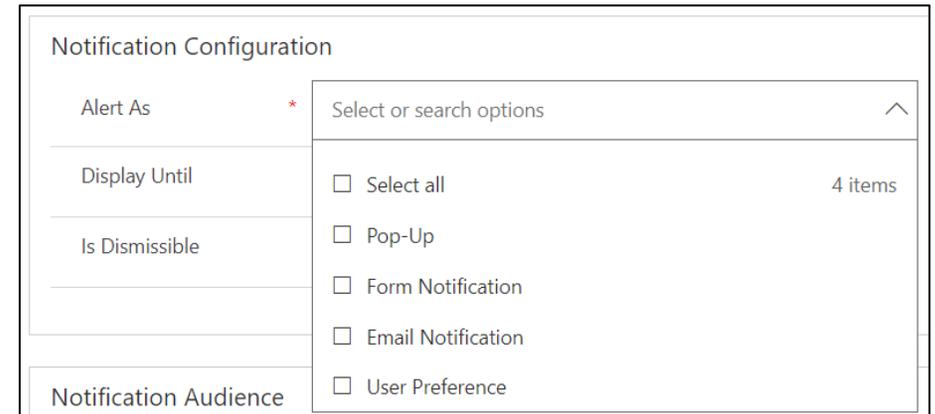
Define Audience

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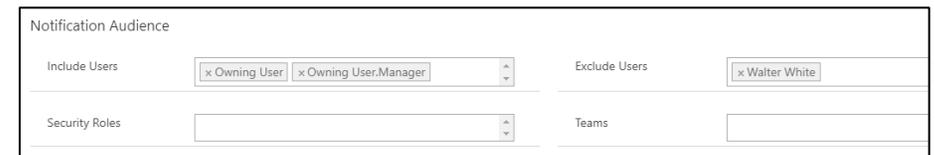
Multiple Languages

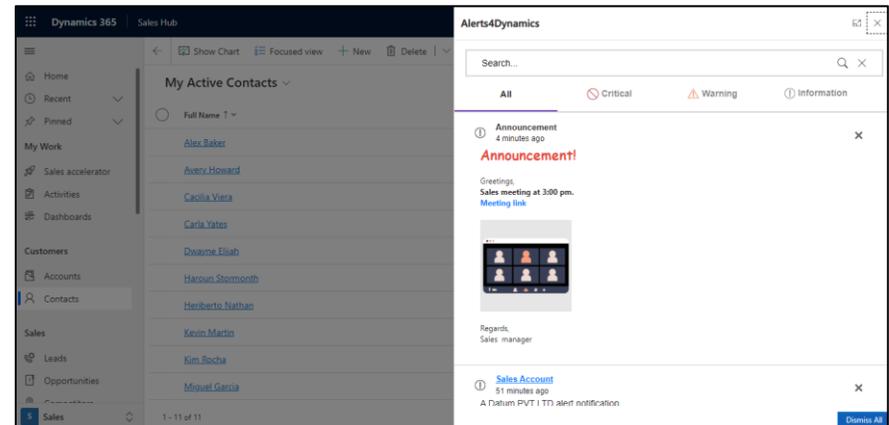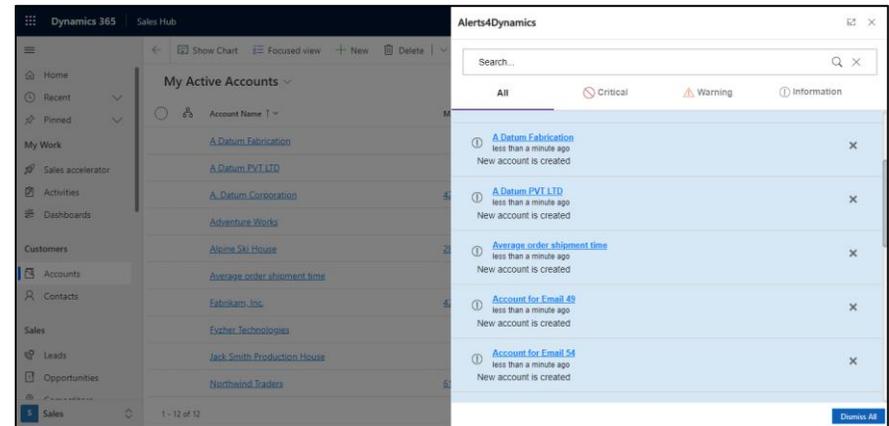Alert messages can be sent in multiple languages.
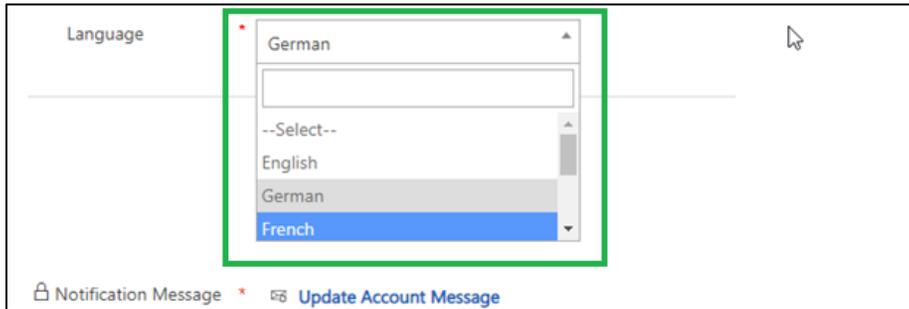
Message Rich Text

Create more interactive messages by doing all kinds of text formatting, adding links and images, etc., to make the alerts and notifications more descriptive and engaging.
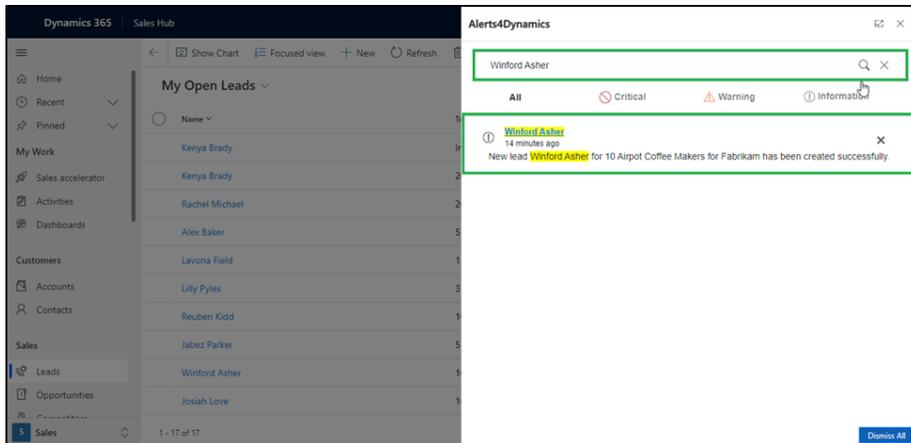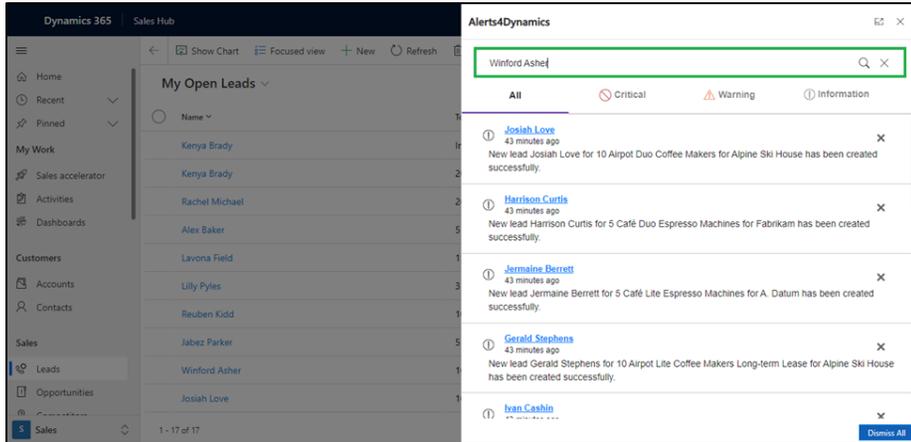

View Notifications

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

Search Notifications

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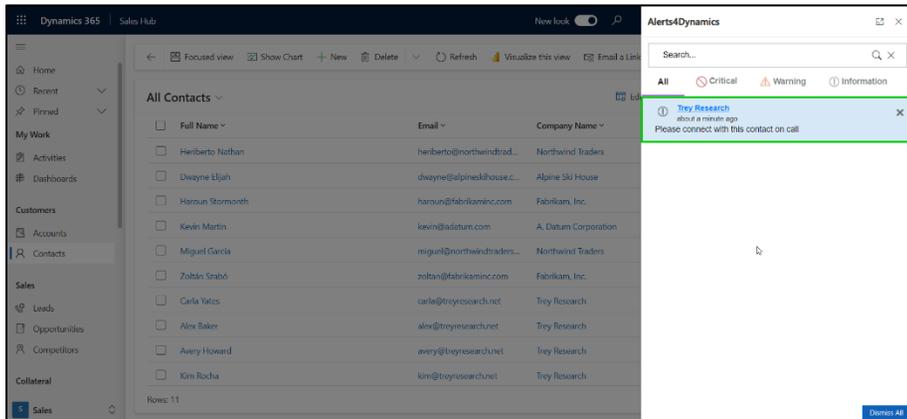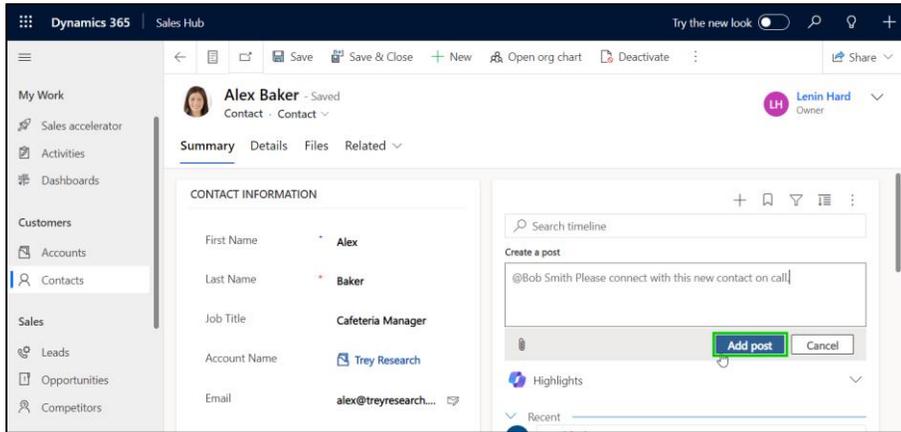

View Log

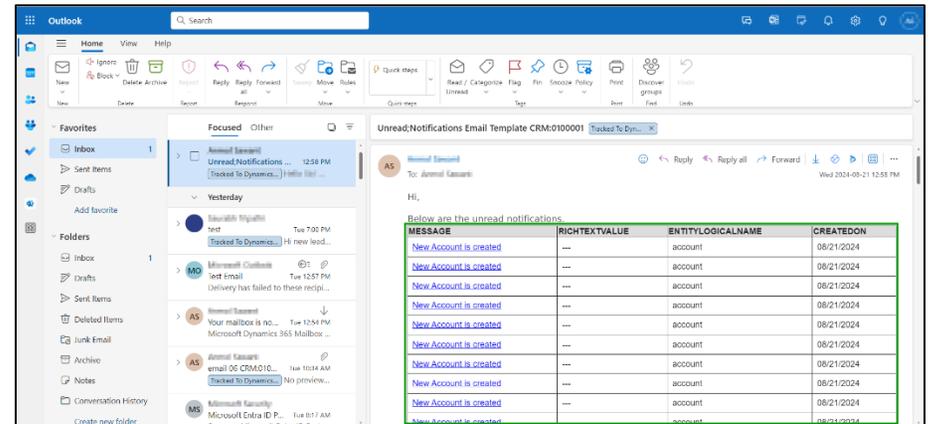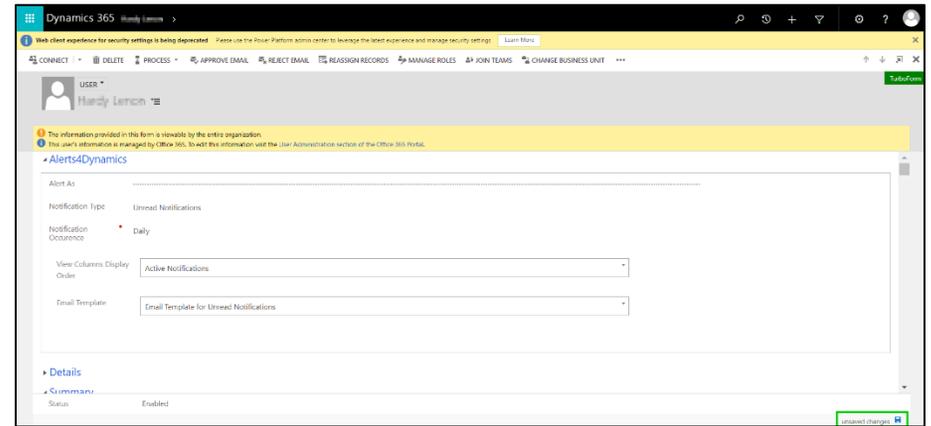View log of alerts read/dismissed by users.

Post Notification

Create custom post messages and tag users on the timeline to deliver these messages as notifications to tagged users.

Email Digest Workflow

Users can receive unread, read-not-dismissed, or all notifications in the form of email digests on a daily, weekly, or monthly basis via emails.

Contact Us:

INOGIC (MUMBAI - INDIA)

M/S. INOGIC TECH (INDIA) PVT. LTD.
A/301, Everest Nivara InfoTech Park,
TTC Industrial Area, MIDC, Turbhe
Navi Mumbai, Maharashtra 400705
INDIA
E-mail: crm@inogic.com
Skype: crm@inogic.com
Twitter: @inogic