



**Alerts4Dynamics**

# Schedule and Manage Alerts in Dynamics 365 CRM



# Key Features

## Multiple Alert Types

Create global announcements and record-level alerts, or automate them based on criteria or events. Alerts can be displayed as pop-ups, form notifications, or emails.

## 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.

## Post Notification

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

## Message Rich Text

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

## Define Audience and Alert Duration

Alerts can be configured to be shown to a particular set of audiences as well as for a particular duration.

## Dismissible and Auto-dismissible Alerts

Alerts can be configured as dismissible/non dismissible and auto-dismissible/non auto-dismissible

- *Set preferences to receive alert notifications as per user's choice*

# Available For

## SUPPORTED VERSIONS

- MICROSOFT DYNAMICS 365 v9.x and above
- Dataverse (Power Apps)

## DEPLOYMENTS

- ON-PREMISES
- DYNAMICS 365 ONLINE

# Form and Pop-up notification

← ↗ Save Save & Close + New Promote Open Org Chart Deactivate Connect | ▾

! Invoice Due

**Best o' Sales** - Saved  
Account · Account ▾

--- Annual Revenue --- No. of Employees

**Summary** Accounting Details Project Price Lists Details Relationships V

**ACCOUNT INFORMATION**

Account Name\*  
Best o' Sales

Phone  
---

Fax  
---

**Timeline**

Search timeline

Enter a note...

**SJ** Email from Sam Jo  
Best o' Sales Summary  
Best o' Sales Summar  
Active

**Dynamics 365** Sales Hub

Home Recent Pinned My Work Sales accelerator Activities Dashboards Customers Accounts Contacts Sales Leads Opportunities Competitors Sales

**Best O' Sales** - Saved  
Account · Account ▾

**Summary** Details Files Related ▾

**ACCOUNT INFORMATION**

Account Name\*  
Best O' Sales

Phone  
---

Fax  
---

Website  
---

Parent Account  
---

**Timeline**

Search timeline

Enter a note...

Capture and

**Alerts4Dynamics**

Search...

All Critical Warning Information

**Best O' Sales**  
less than a minute ago  
Invoice Due

**Announcement**  
about 7 hours ago  
**Announcement!**  
Greetings,  
Sales meeting at 3:00 pm.  
Meeting link

Dismiss All



# View and dismiss Notifications

The screenshot displays the Dynamics 365 Sales Hub interface. On the left is a navigation pane with sections: Home, Recent, Pinned, My Work (Sales accelerator, Activities, Dashboards), Customers (Accounts, Contacts), and Sales (Leads, Opportunities, Competitors). The main area shows 'My Active Accounts' with a list of accounts including A Datum Fabrication, A Datum PVT LTD, A. Datum Corporation, Adventure Works, Alpine Ski House, Average order shipment time, Fabrikam, Inc., Fyzher Technologies, Jack Smith Production House, and Northwind Traders. An 'Alerts4Dynamics' overlay window is open on the right, featuring a search bar and filter tabs: All, Critical, Warning, and Information. The 'All' tab is selected, showing a list of notifications. Each notification includes an information icon, a link to the account, the time 'less than a minute ago', the message 'New account is created', and a dismiss 'X' icon. A 'Dismiss All' button is at the bottom right of the overlay.

| Filter | Notification                                | Time                   | Message                | Action  |
|--------|---|------------------------|------------------------|---------|
| All    | <a href="#">A Datum Fabrication</a>         | less than a minute ago | New account is created | Dismiss |
| All    | <a href="#">A Datum PVT LTD</a>             | less than a minute ago | New account is created | Dismiss |
| All    | <a href="#">Average order shipment time</a> | less than a minute ago | New account is created | Dismiss |
| All    | <a href="#">Account for Email 49</a>        | less than a minute ago | New account is created | Dismiss |
| All    | <a href="#">Account for Email 54</a>        | less than a minute ago | New account is created | Dismiss |

# Auto Dismissal of Alert

The screenshot displays the Inogic Alerts4Dynamics application interface. The top menu bar includes options like File, Save and Close, Activate, Convert to a real-time workflow, Show Dependencies, Solution Layers, and Actions. The main workspace is divided into a left sidebar and a central panel.

**Left Sidebar:**

- Common**
  - Information
  - Audit History
  - Catalog Assignments
  - Entities
  - Entities
  - Agent script steps
  - Agent script steps
  - Macro Run Histories
  - Workflow Triggers
  - Messages
  - Messages
  - Messages
  - Chatbot subcomponent...
- Process Sessions**
  - Process Sessions

**Central Panel:**

The central panel shows the configuration for a "Rule based alert - My Active Accounts - Saved". The "General" tab is selected, displaying the "Message" configuration. The "Language" dropdown is set to "English".

**Notification Configuration:**

| Property         | Value             |
|------------------|-------------------|
| Alert As         | Form Notification |
| Display As       | Dialog            |
| Display Until    | ---               |
| Alert Level      | Information       |
| Is Dismissible   | Yes               |
| Auto Dismissible | Yes               |

The "Auto Dismissible" property is highlighted with a green box, indicating the setting for automatic dismissal of the alert.

# Dismissible/Non-dismissible Alerts

**Record Particular** - Saved Active Status

Message

**General** Notification Related ▾

Language \* English

**Notification Configuration**

|                |  |             |            |
|----------------|--|-------------|------------|
| Alert As       | * Pop-Up, Form Notification, User Preference | Display As  | * Bar      |
| Display Until  | ---  | Alert Level | * Critical |
| Is Dismissible | <b>Yes</b>                                   |             |            |

# Read and Dismissed Notifications

Notification

General

Related

🔒 Message Text

Mobile number and email information is missing on this account

🔒 Display End Date

---

---

🔒 Language

English

🔒 Alert

🔔 Info missing

🔒 Message

+

📧 Update info

🔒 Notification Request

+

---

Read Notifications

🔄 Refresh

✓ | User ↓ ▾

Date ▾

✓ Ruben Leo

6/5/2020 1:09 PM

🕒 Lucy Heart

6/5/2020 1:18 PM

🕒 Andy Moore

6/5/2020 1:16 PM

Dismissed Notifications

🔄 Refresh

✓ | User ↓ ▾

Date ▾

✓ Ruben Leo

6/5/2020 1:10 PM

🕒 Lucy Heart

6/5/2020 1:18 PM

🕒 Andy Moore

6/5/2020 1:16 PM



# Entity Configuration



✓ ACTIVATE    ↻ SEND REQUEST

CRM Version 9.1

User License 5

## Notification

### Notification Details

(Notify User and Inogic about issues regarding licensing.)

From Alex Wu (alex@a4dobf.onmicrosoft.com)

To John B (john@a4dobf.onmicrosoft.com)

Notify To Inogic ☒

Notification Interval ☒ Once a day ☐ Once a week ☐ Once a month

## License Registration using (\*.lic) file

## Enable Entity Configuration

### Available Entities

Action Card Role Setting  
actioncardregarding  
Address  
Appointment  
Article  
Bookable Resource  
Bookable Resource Booking

>>

<<

### Selected Entities

Account  
Contact  
Invoice  
Lead

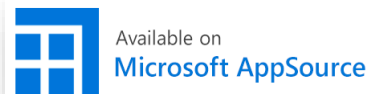
License Start Date 06/17/2019

License End Date 10/15/2019

Active



crm@inogic.com



# Global Notifications

Save Save & Close Delete Refresh Share Email a Link Flow

## Holiday Alert

General Related

|            |                |
|------------|----------------|
| Name       | * Holiday      |
| Alert Type | * Announcement |

### Messages

✓ Name

Holiday on 30th July

## Holiday on 30th July Message

General Notification Related

|                    |                        |
|--------------------|------------------------|
| Name               | * Holiday on 30th July |
| Alert              | *  Holiday             |
| Process Start Date | * 6/4/2020             |

### Notification Message

|              |   |
|--------------|---|
| Message Text | * Holiday on 30th July due to elections |
|--------------|---|

## Holiday on 30th July Message

Active Status Active Status Reason Owner

General Notification Related

Font Size B I U

Language \* English

### Notification Configuration

|               |               |                |                                  |
|---------------|---------------|----------------|----------------------------------|
| Alert Level   | * Information | Alert As       | * Pop-Up, Form Notification, ... |
| Display Until | 1 hour        | Email Workflow | *  Send Email Notification       |

### Notification Audience

|                |             |               |             |
|----------------|-------------|---------------|-------------|
| Include Users  | Jane Doe    | Exclude Users | John Watson |
| Security Roles | Salesperson | Teams         | Sales Team  |

### Notification Message

+ New Message Texts

|                      |   |          |         |
|----------------------|---|----------|---------|
| ✓ Message            | ↑ | Language | English |
| Holiday on 30th July |   | English  |         |

# Record Level Notifications

AD

**A. Datum Corporation (sample)**  
Account · Account ▾

SummaryDetailsFilesAlertsRelated

Show Chart

+

New Alert

Add Existing Alert

Refresh

Run Report ▾

Alert Associated View ▾

✓ Name ▾Alert Type ▾

Account OverdueRecord Based

Account Overdue message

Message

GeneralNotificationRelated

Name

\*

Account Overdue message

Message Type

\*

Simple

Alert

\*

Account Overdue

Process Start Date

\*

6/5/2020

Font ▾Size ▾B I U

LanguageEnglish ▾

Notification Configuration

Alert Level

\*

Critical

Alert As

\*

Form Notification

Display Until

45 minutes

Notification Audience

Include Users

Exclude Users

Security Roles

Teams

x Sales Team

Notification Message

✓ Message ▴ ▾

Language ▾

Check account balance before new sales

English

+ New Message Texts

## Criteria based Automated Notifications

Update Account Alert

Alert

General

Related

Name

\*

Update Account Alert


Alert Type

\*

Rule Based

Entity Configuration

\*

 [account](#)

Rule Mode

\*

Advanced

Fetch XML

\*

<fetch version="1.0" xmlns="urn:ietf:params:xml:ns:fetch" mapping="log" >
<entity name="Account" >
<attribute name="AccountID" type="string" />
</entity>
</fetch>

Update Account Message

Message

General

Notification

Related

Name

\*

Update Account Message


Message Type

\*

Simple

Alert

\*

 [Update Account Alert](#)

Process Start Date

\*

6/5/2020

Process End Date

6/18/2020

**Font** **Size** **B** *I* U

Language \* English ▼

### Notification Configuration

|                              |   |
|------------------------------|---|
| Alert Level * <b>Warning</b> | Alert As * Pop-Up, Form Notification, Email ... |
| Display Until <b>1 hour</b>  | Email Workflow * <b>Send Email Notification</b> |

# Automated Notifications through Workflows

GeneralAdministrationNotes

▼ Hide Process Properties

Process Name \*

Notification for Paid Invoice

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)

Add Step ▼Insert ▼Delete this step.

Create Notification

Create: Notification Request ▼Set Properties

Entity

Invoice

Category

Workflow

Options for Automatic Processes

Process: Notification for paid invoice

Create Notification Request

Name \*

Alert for invoice paid

Message Text

{Name(Invoice)} has been paid

Message Rich Text

Alert As

Pop-Up

No

Yes

Email Notification

No

Yes

Form Notification

No

Yes

Is Dismissible

No

Yes

Display AsUser Preference

No

Yes

Alert Level \*

Information

Display Until

3

Regarding

{Invoice(Invoice)}

Notification Associated With \*

{Record URL(Dynamic)(Customer (Account))}

Audience Settings

Notification Audiences

Include Users

{Owning User(Invoice)} {Manager(Owning User (User))}

Exclude Users

Jane Doe

Team

Email Recipients

From

John Watson

To

CC

Scott Hamells


BCC



# Set Alert Message and Level

**Holiday on 30th July**  
Message

**General** Notification Related

|                    |  |
|--------------------|--|
| Name               | * Holiday on 30th July   |
| Alert              | *  <b>Holiday</b> |
| Process Start Date | * 6/4/2020   |















Notification Message

|              |   |
|--------------|---|
| Message Text | * Holiday on 30th July due to elections |
|--------------|---|

**Holiday on 30th July**  
Message


Active Status Active Status Reason Owner

**General** Notification Related

Font Size B I U               ...

Language \* English

Notification Configuration

|               |               |                |   |
|---------------|---------------|----------------|---|
| Alert Level   | * Information | Alert As       | * Pop-Up, Form Notification, ...  |
| Display Until | 1 hour        | Email Workflow | *  Send Email Notification |

Notification Audience

|                |             |               |             |
|----------------|-------------|---------------|-------------|
| Include Users  | Jane Doe    | Exclude Users | John Watson |
| Security Roles | Salesperson | Teams         | Sales Team  |

Notification Message

+ New Message Texts

|                      |            |
|----------------------|------------|
| ✓ Message ↑          | Language ↓ |
| Holiday on 30th July | English    |

# Set User Preference

**Alert as user preference** - Saved

Message

General Notification Related ▾

Notification Message

Message Text (name) account alert notification

Message Rich Text

Enter text...

Language English

Notification Configuration

Alert As User Preference Alert Level Information

USER ▾  
Andy Johnson ▮

! The information provided in this form is viewable by the entire organization.  
! This user's information is managed by Office 365. To edit this information visit the User Administration section of the Office 365 Portal.

Details  
Alerts4Dynamics

Alert As Email Notification

USER ▾  
John Shaw ▮

! The information provided in this form is viewable by the entire organization.  
! This user's information is managed by Office 365. To edit this information visit the User Administration section of the Office 365 Portal.

Details  
Alerts4Dynamics

Alert As Pop-Up

# Message Types

Update Account Message

Message

Active StatusActive Status ReasonOwner

GeneralNotificationRelated

Name

\*

Update Account Message

Message Type

\*

Advanced

Workflow

\*

Create Account Notification

Alert

Update Account Alert

Process Start Date

\*

6/5/2020

Process End Date

6/18/2020

Update Account Message

Message

GeneralNotificationRelated

Name

\*

Update Account Message

Message Type

\*

Simple

Alert

\*

Update Account Alert

Process Start Date

\*

6/5/2020

Process End Date

6/18/2020

# Message Rich Text

The screenshot shows the Dynamics 365 Alerts4Dynamics interface. The top navigation bar includes 'Dynamics 365' and 'Alerts4Dynamics'. The left sidebar lists various options: Home, Recent, Pinned, Alerts4Dynamics, Alerts, Entity Configurations, Message Texts, Notifications, Alerts4Dynamics Logs, Configurations, and License Registration. The main area displays a 'Sales meeting invite - Unsaved' message. The 'Message Rich Text' editor is active, showing a preview of the message content: 'Announcement!', 'Greetings. Sales meeting at 3:00 pm.', a 'Meeting link', and a video conference thumbnail. The bottom of the editor features a rich text toolbar with options for font color, size, bold, italic, underline, link, and list creation.

The screenshot shows the Dynamics 365 Sales Hub interface. The top navigation bar includes 'Dynamics 365' and 'Sales Hub'. The left sidebar lists various options: Home, Recent, Pinned, My Work, Sales accelerator, Activities, Dashboards, Customers, Accounts, Contacts, Sales, Leads, Opportunities, and Competitors. The main area displays a list of 'My Active Contacts' with names like Alex Baker, Avery Howard, Cacilia Viera, Carla Yates, Dwayne Elijah, Haroun Stormonth, Heriberto Nathan, Kevin Martin, Kim Rocha, and Miguel Garcia. A detailed view of a 'Sales meeting invite' message is shown on the right, featuring a search bar, filters (All, Critical, Warning, Information), and a list of messages. The selected message is an 'Announcement' from 55 minutes ago, containing the text 'Greetings. Sales meeting at 3:00 pm.', a 'Meeting link', and a video conference thumbnail. The bottom of the message view shows a 'Dismiss All' button.

# Search Notifications

The image displays two screenshots of the Alerts4Dynamics application interface, demonstrating search functionality. Both screenshots show a sidebar with navigation options (Home, Recent, Pinned, My Work, Sales accelerator, Activities, Dashboards, Customers, Accounts, Contacts, Sales) and a main content area titled 'My Open Leads'.

**Left Screenshot:** The search bar contains 'Winford Asher'. The results list shows several entries, including Josiah Love, Harrison Curtis, Jermaine Berrett, Gerald Stephens, and Ivan Cashin. Each entry includes a timestamp (43 minutes ago) and a description of a new lead created successfully.

**Right Screenshot:** The search bar contains 'Winford Asher'. The results list shows a single entry for Winford Asher, with a timestamp of 14 minutes ago and a description of a new lead created successfully. A green box highlights the search bar and the single result.



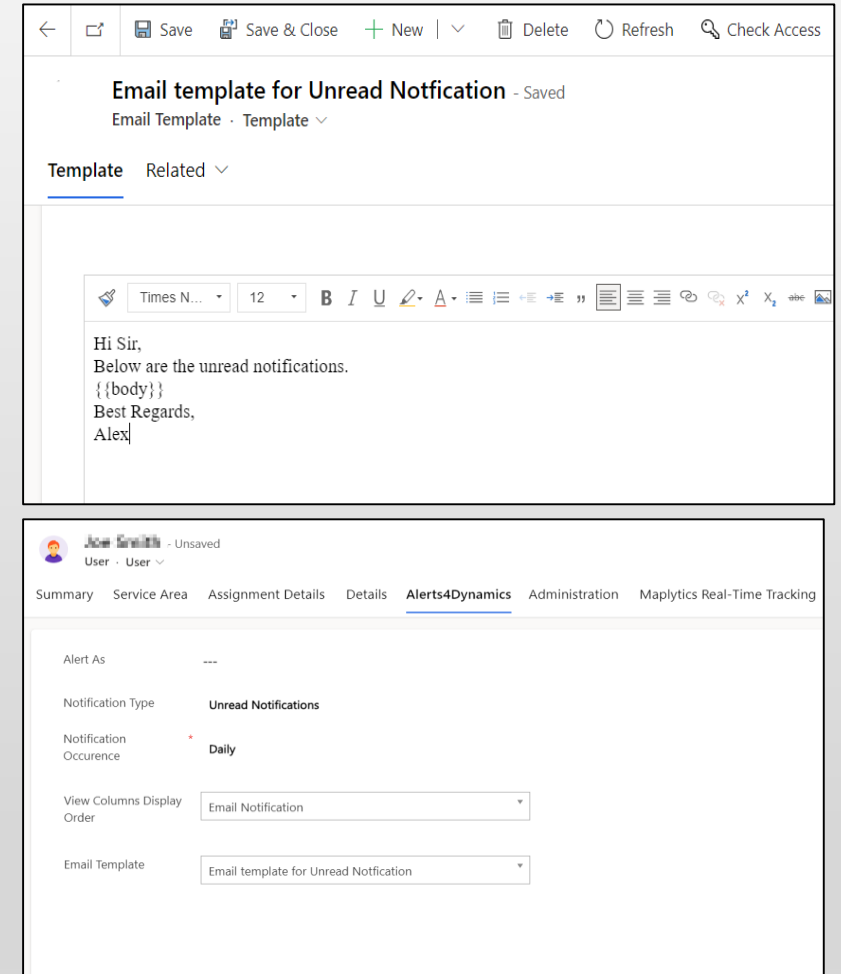
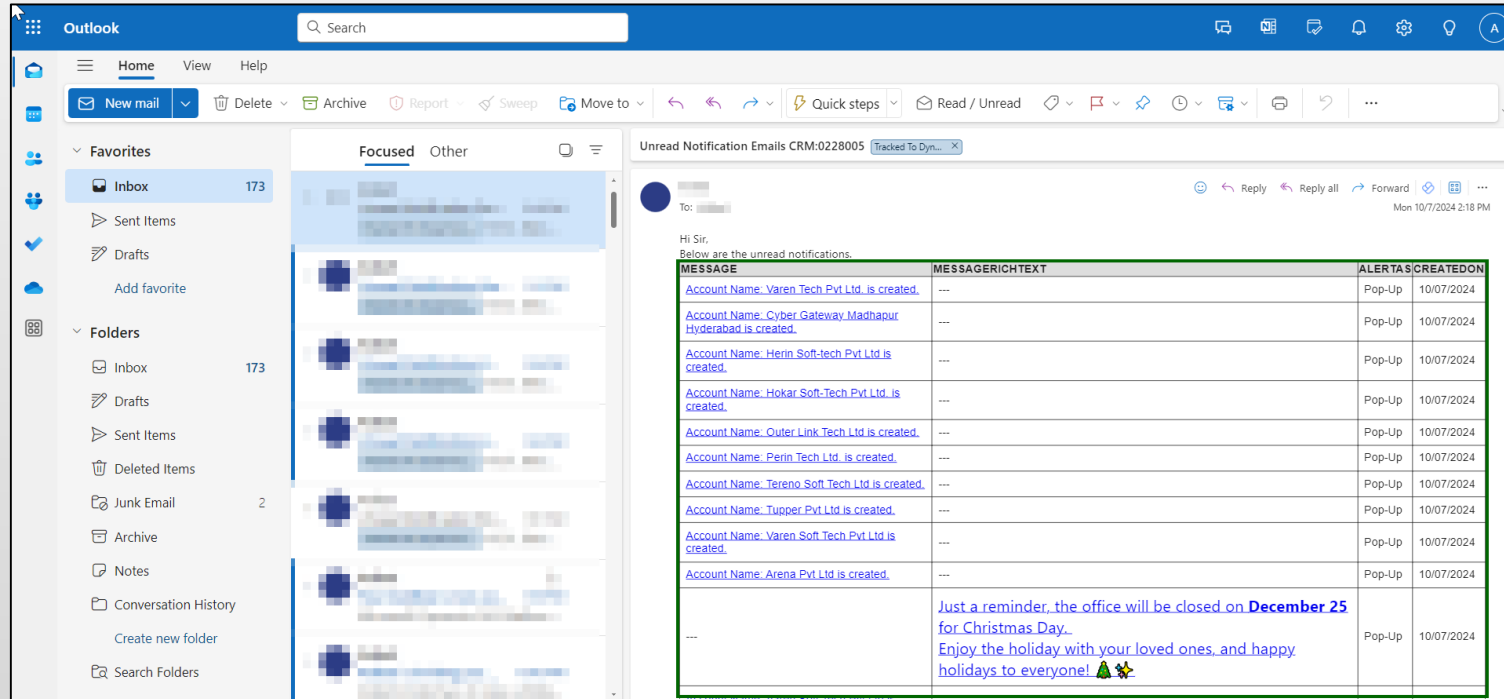
# Post Notifications

This screenshot shows the Dynamics 365 Sales Hub interface. The left sidebar contains navigation options like 'My Work', 'Sales accelerator', 'Activities', 'Dashboards', 'Customers', 'Accounts', 'Contacts', 'Sales', 'Leads', 'Opportunities', 'Competitors', 'Collateral', 'Quotes', and 'Orders'. The main area displays the contact details for Alex Baker, including his first and last name, job title (Cafeteria Manager), account name (Trey Research), email, and phone numbers. A 'Create a post' section is visible, with a text input field containing '@Bob Smith Please connect with this new contact on call'. A green box highlights the 'Add post' button.

This screenshot shows the Dynamics 365 Sales Hub interface with a list of contacts. The left sidebar is the same as the previous screenshot. The main area displays a list of contacts under the heading 'All Contacts'. The list includes columns for 'Full Name', 'Email', and 'Company Name'. A green box highlights a notification from Alerts4Dynamics in the top right corner, which reads: 'Trey Research about a minute ago Please connect with this contact on call'. The notification has a close button (X) and a 'Dismiss All' button at the bottom right.

| Full Name        | Email                      | Company Name         |
|------------------|----------------------------|----------------------|
| Heriberto Nathan | heriberto@northwindtrad... | Northwind Traders    |
| Dwayne Elijah    | dwayne@alpineskihouse.c... | Alpine Ski House     |
| Haroun Stormonth | haroun@fabrikaminc.com     | Fabrikam, Inc.       |
| Kevin Martin     | kevin@adatum.com           | A. Datum Corporation |
| Miguel Garcia    | miguel@northwindtraders... | Northwind Traders    |
| Zoltán Szabó     | zoltan@fabrikaminc.com     | Fabrikam, Inc.       |
| Carla Yates      | carla@treyresearch.net     | Trey Research        |
| Alex Baker       | alex@treyresearch.net      | Trey Research        |
| Avery Howard     | avery@treyresearch.net     | Trey Research        |
| Kim Rocha        | kim@treyresearch.net       | Trey Research        |

# Email Digest Workflow



# Next Steps

- Learn more about [Alerts4Dynamics](#) today.
- Get your free **Alerts4Dynamics** trial now from [Microsoft AppSource](#) or [our website](#)!
- Email: [crm@inogic.com](mailto:crm@inogic.com)

