Alerts4Dynamics

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User Manual

Content

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.

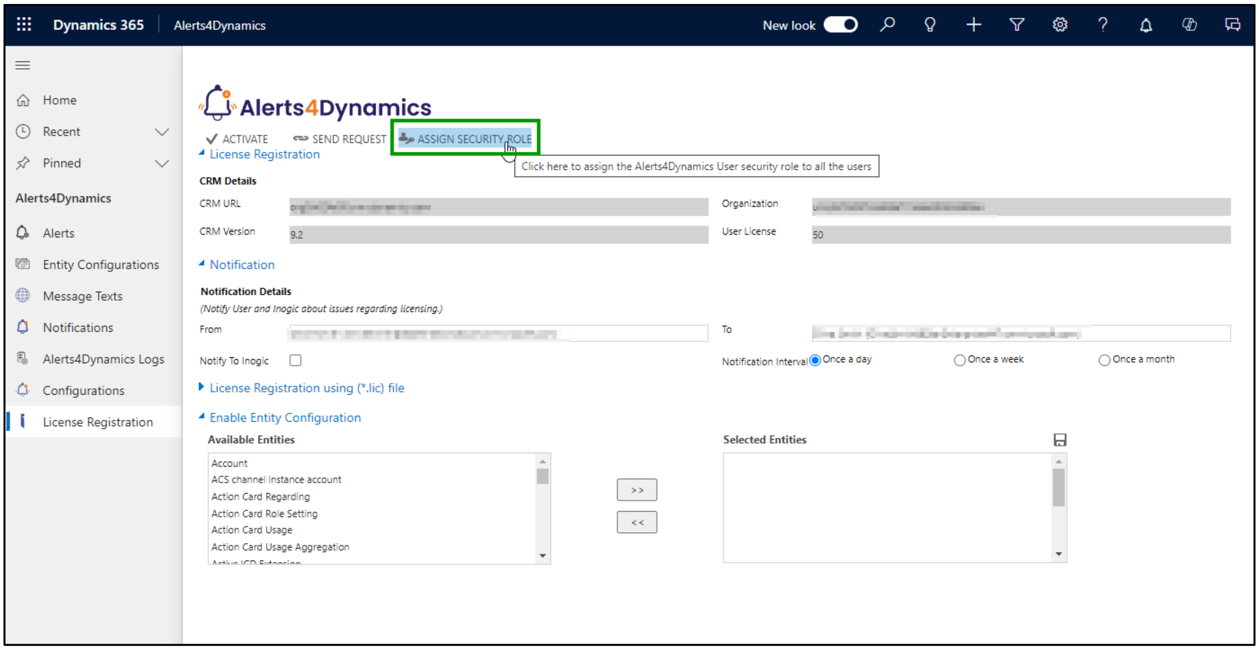
1. **Alerts4Dynamics Administrator** – The Administrator is given the privilege for License Registration, Enable Entity Configurations, Read Entity Configuration, Create Alerts, View Alerts of other users and has organization level access of all entities of Alerts4Dynamics.
2. **Alerts4Dynamics Manager** – 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:

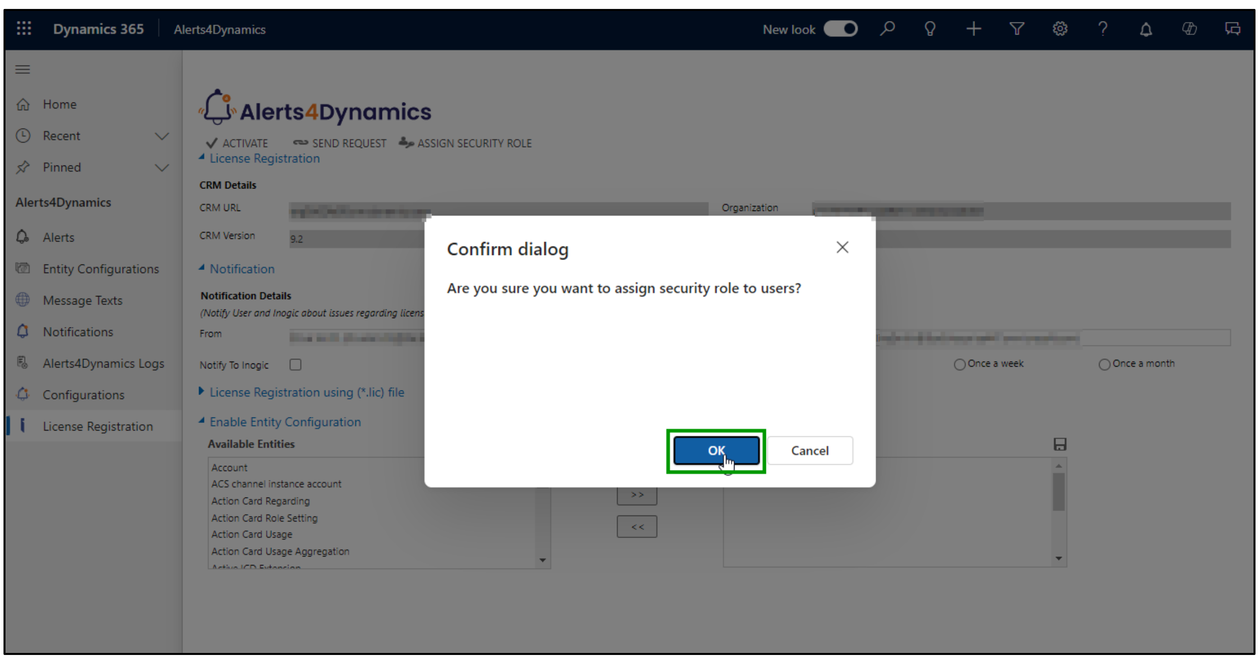
- ***It is necessary to assign any one of the above security roles to use Alerts4Dynamics solution***
- ***System Administrator has all the rights that Alerts4Dynamics administrator has***
- ***For other than the English language, the user must have one of the following roles Alerts4Dynamics User, Alerts4Dynamics 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.

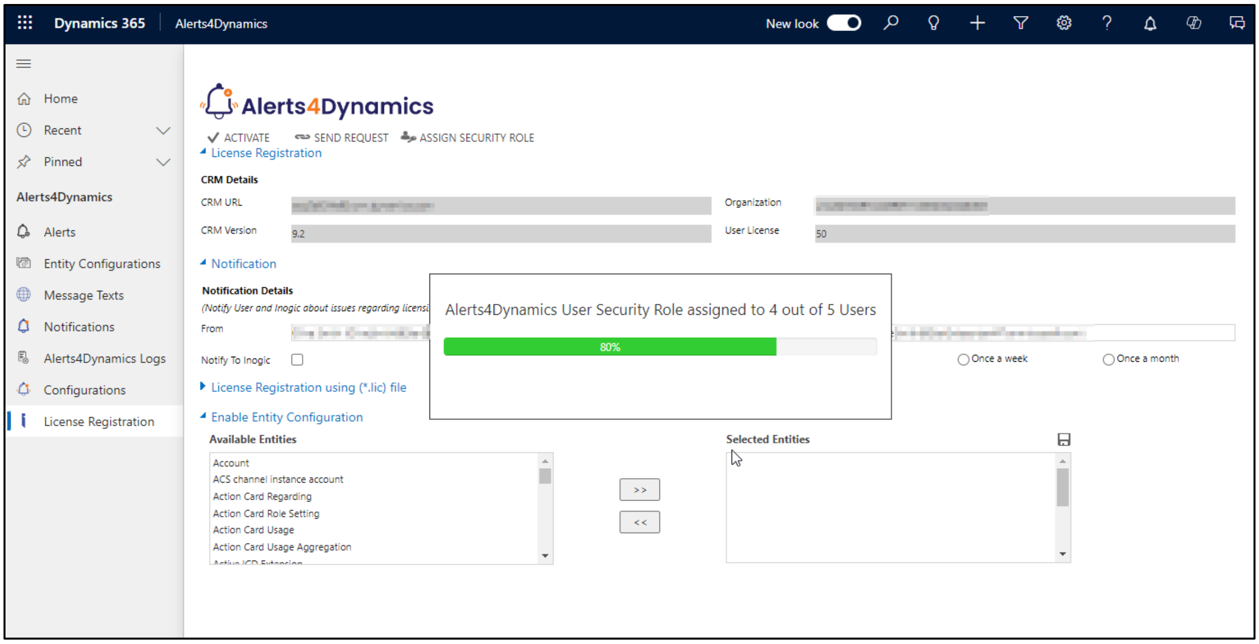
- Navigate to **Alerts4Dynamics App -> License Registration ->** Click on the **Assign Security Role** button.



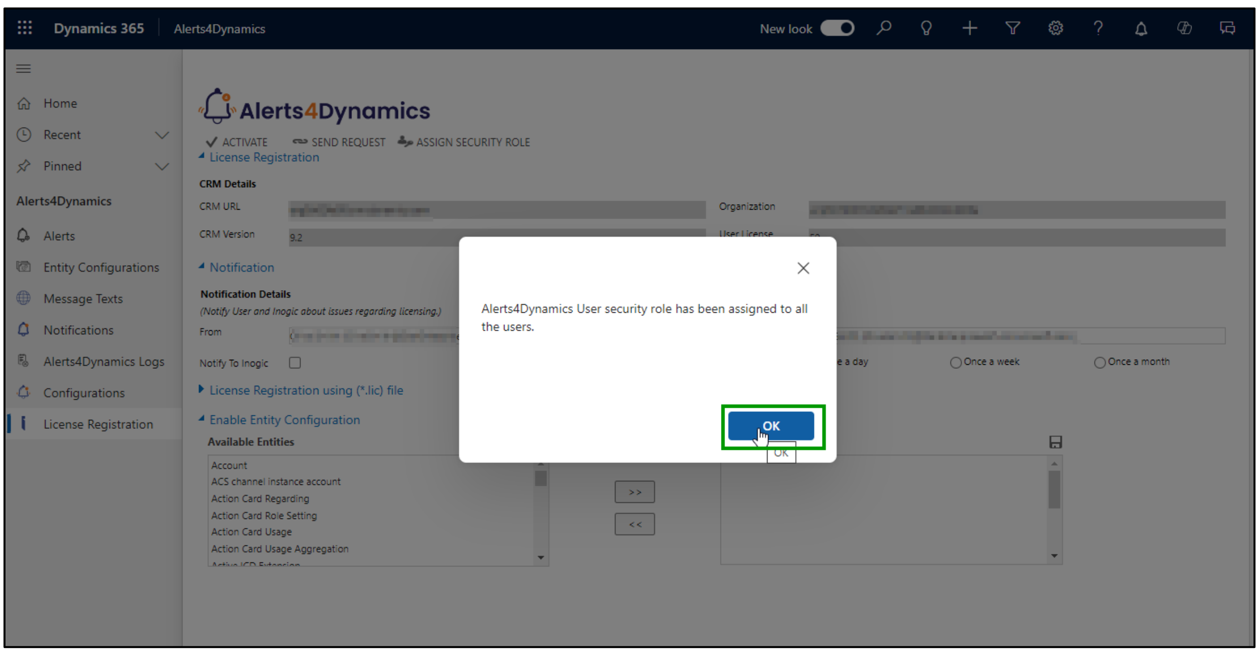
- A confirmation dialog box will appear. Click on **OK**.



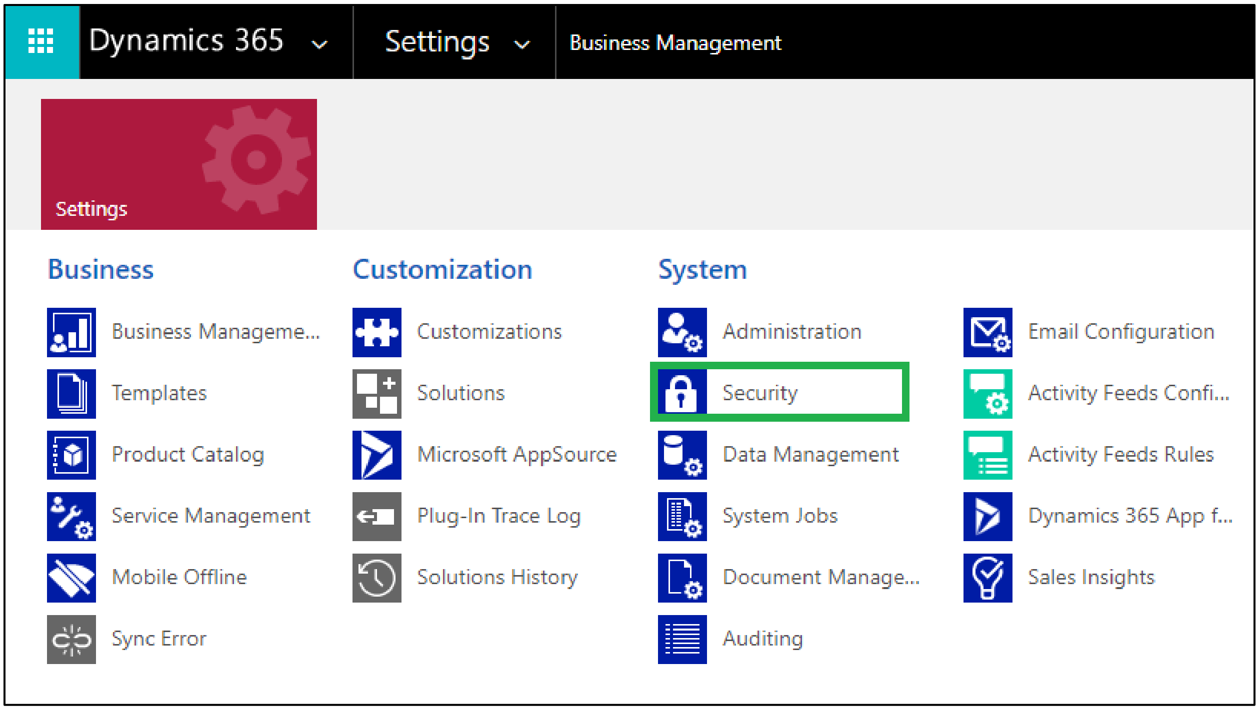
- The **Alerts4Dynamics user** security role will now be assigned to all the users present in Dynamics 365 CRM.



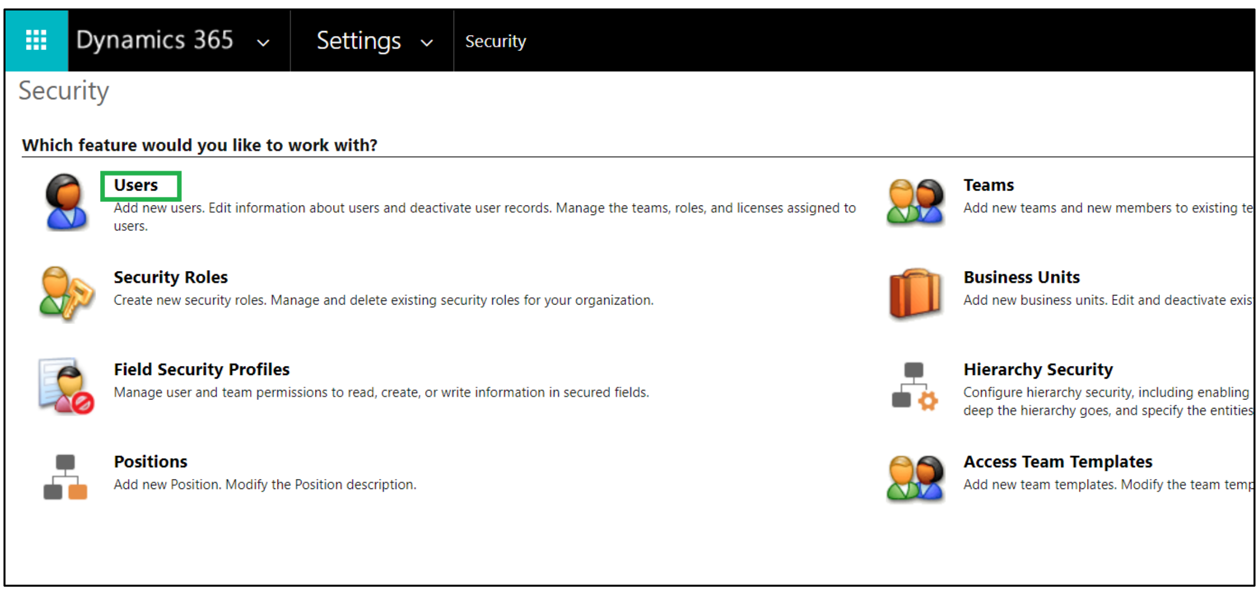
- Now click on **"OK"** to close the pop up.



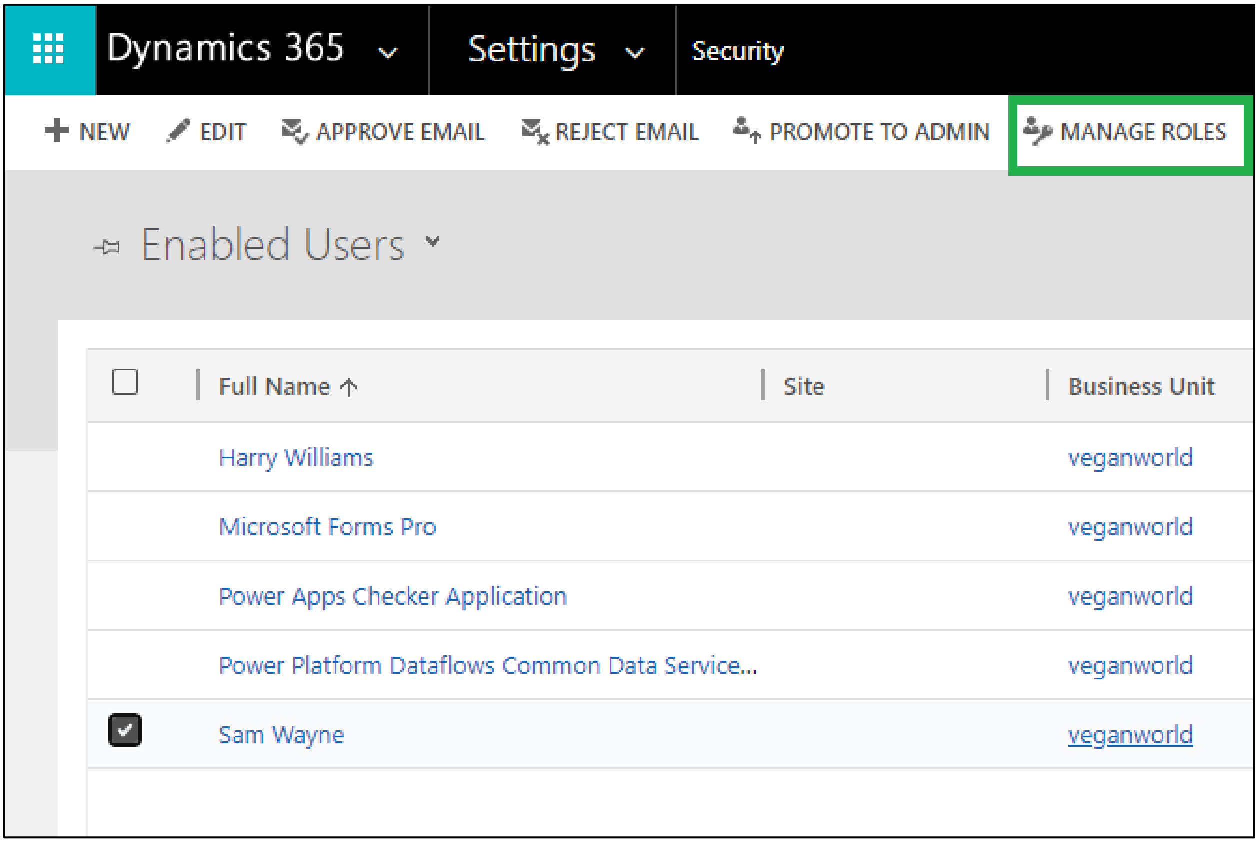
- You can also follow another alternative method to set up security roles, as mentioned below:
- Go to **Advanced Settings --> Settings --> Security.**



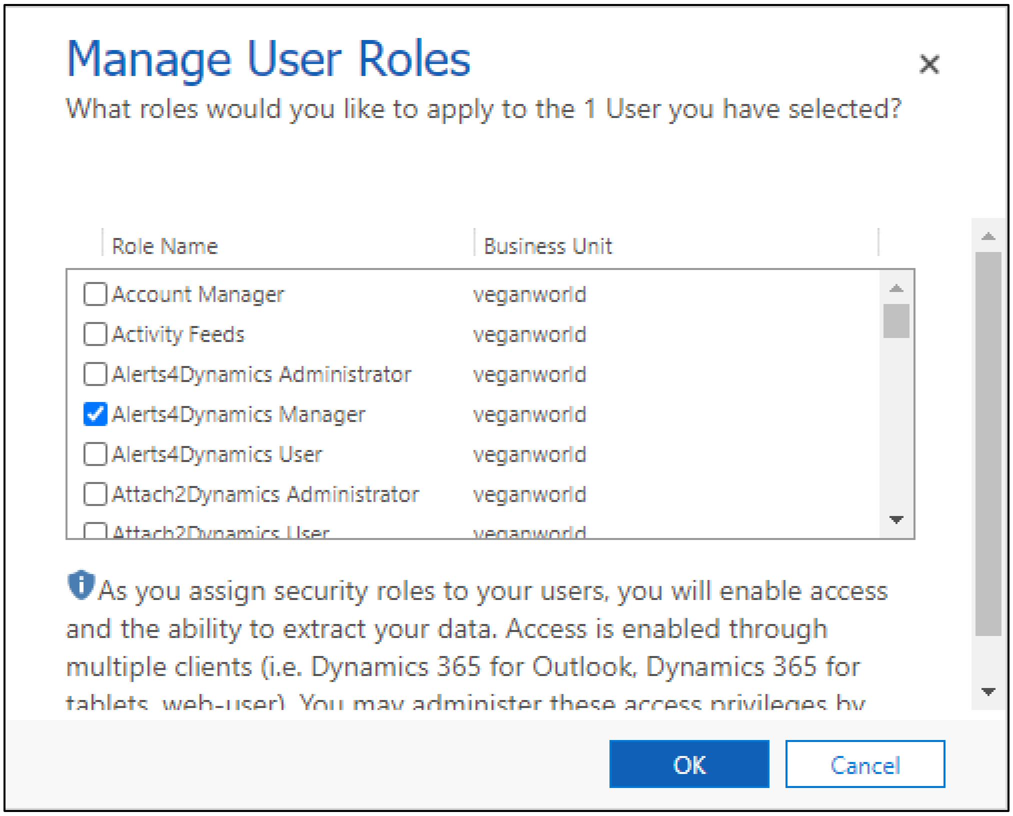
- Select **Users.**



- Select user **-->** Click on **MANAGE ROLES.**



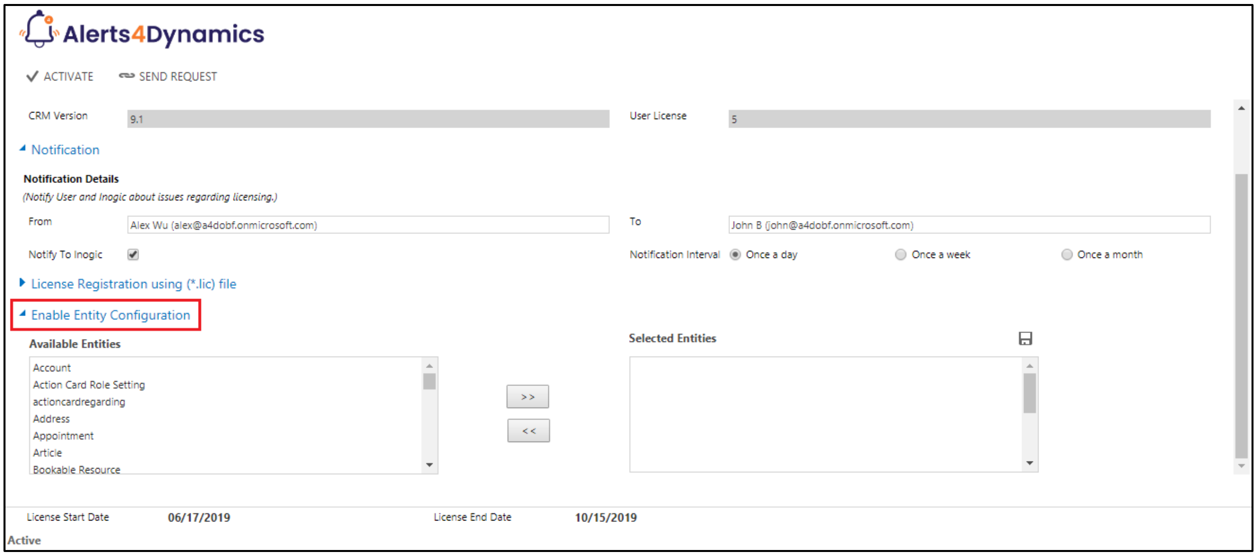
- Click on any one of the security roles --> Click **OK.**



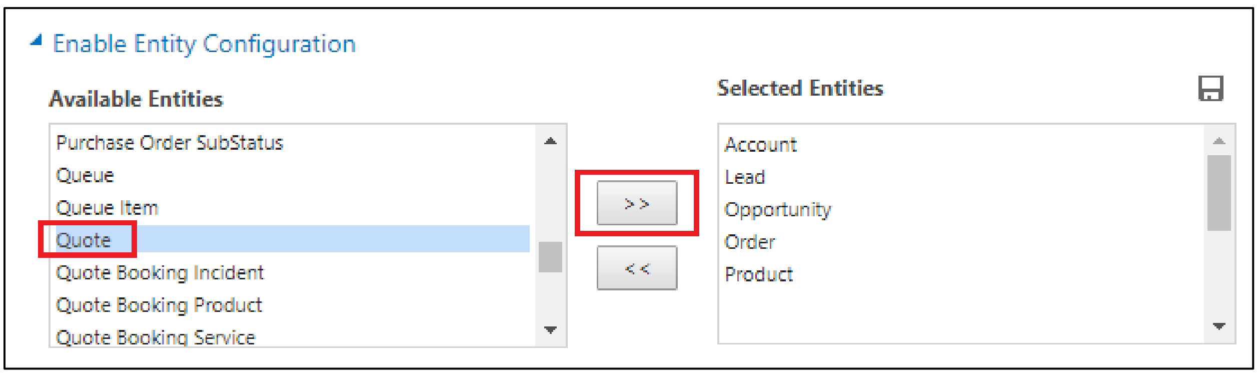
Entity Configuration

In order to create Alerts for a particular entity, Entity Configuration for that entity needs to be enabled.

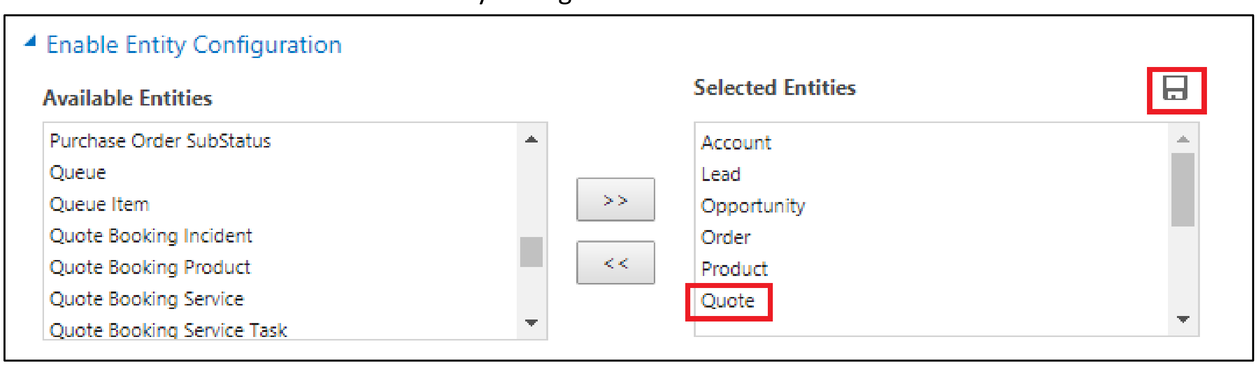
1. To enable Entity Configuration navigate to **Alerts4Dynamics** App → **License Registration** → **Enable Entity Configuration**



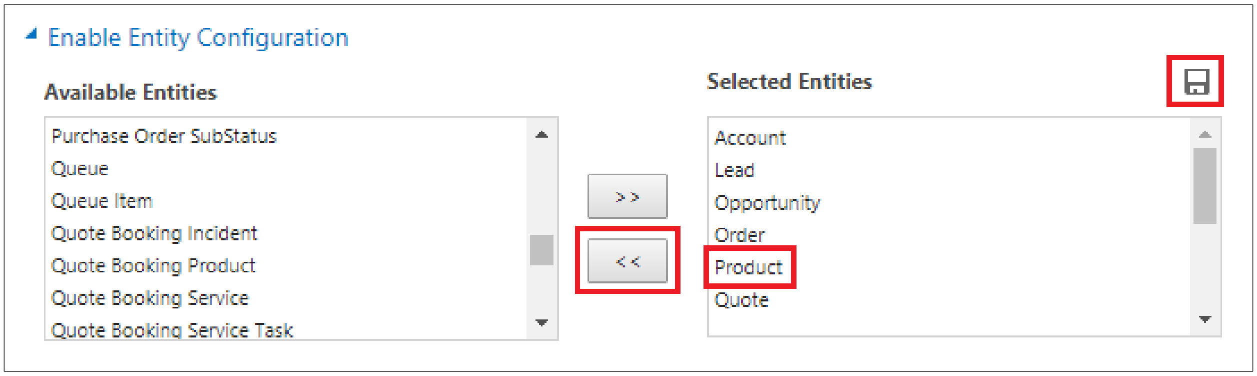
2. Users can select the entities from the list of **Available Entities** and move them to the list **Selected Entities.**



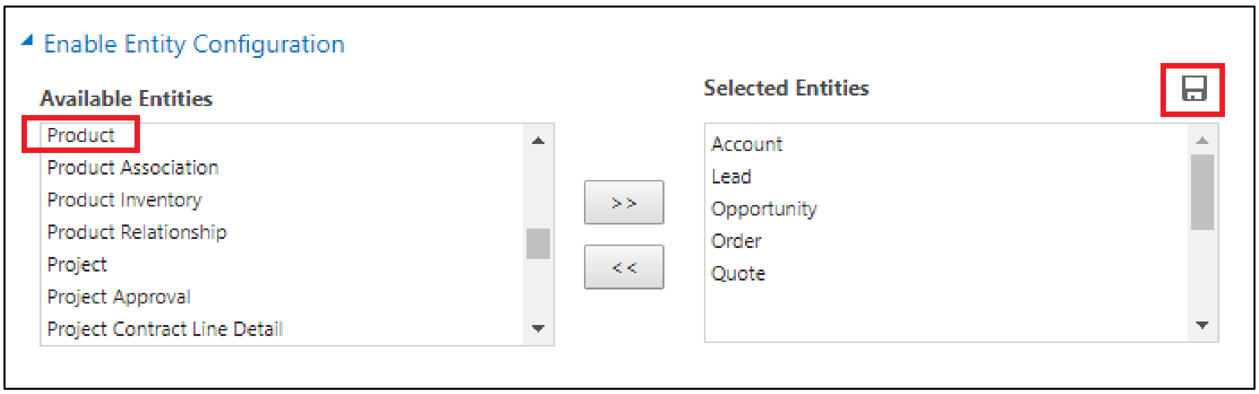
3. Click on **Save** button to enable Entity Configurations for these selected entities.



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

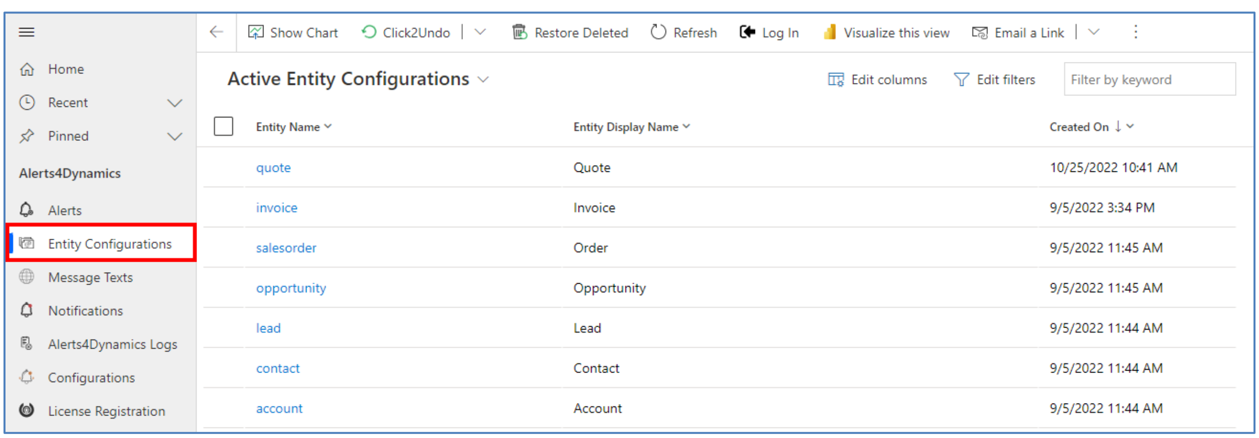


5. You can see the Product has been removed from **Selected Entities** grid and is now again available in **Available Entities** grid. Click on **Save** in order to retain these settings.



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.



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).

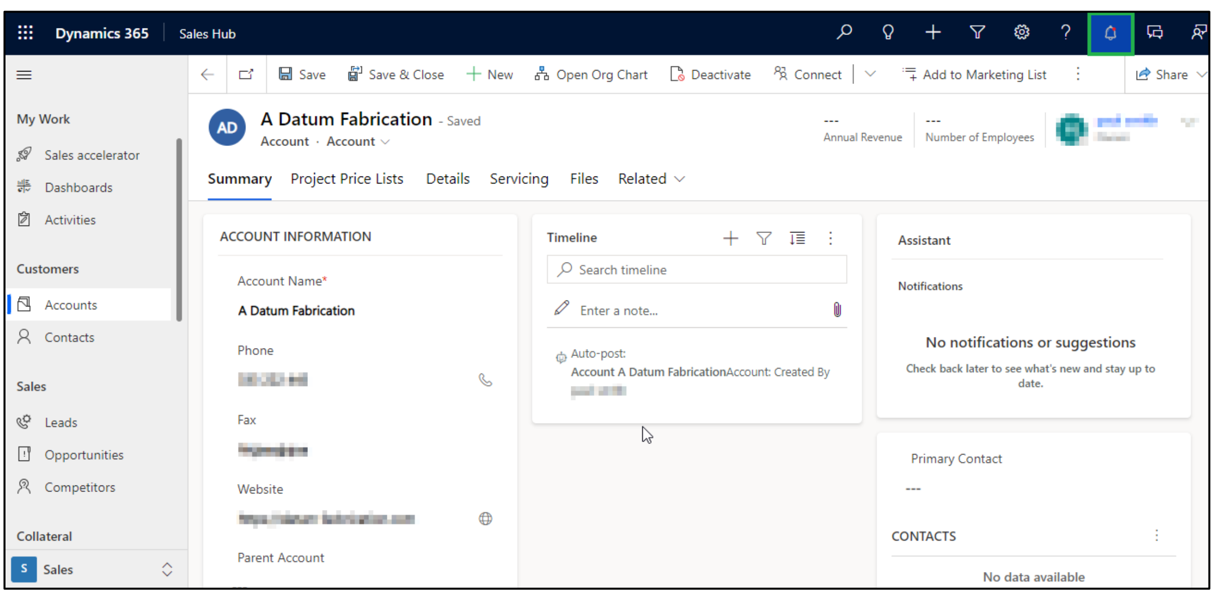
Display of Alerts

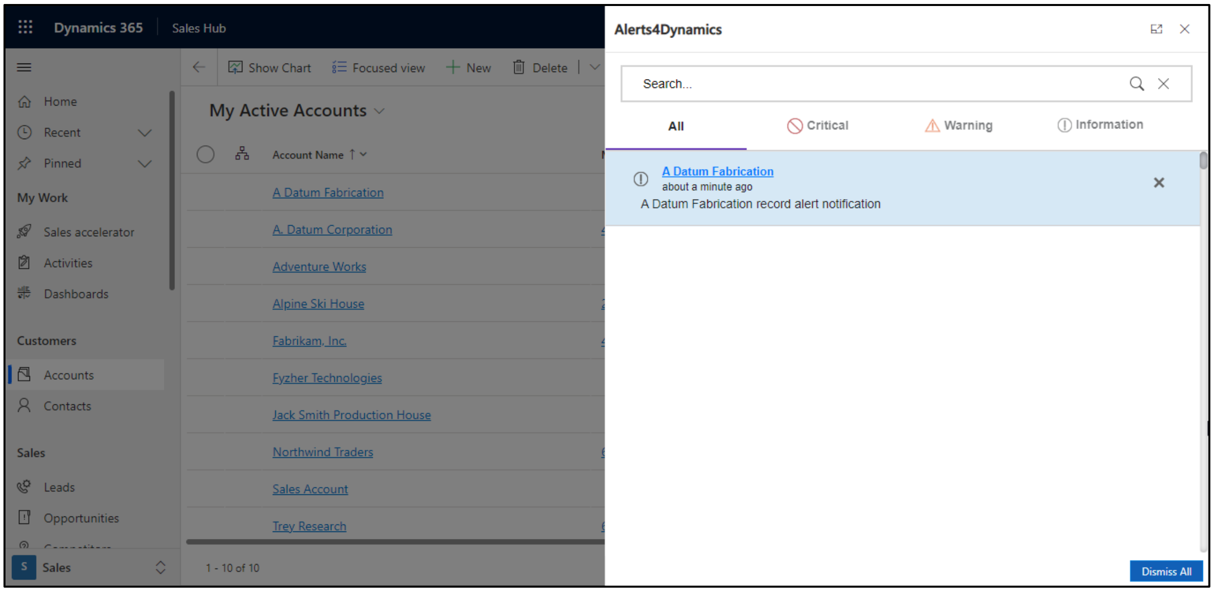
Alerts4Dynamics app displays Alert in the following three ways:

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

Alert as Pop up:

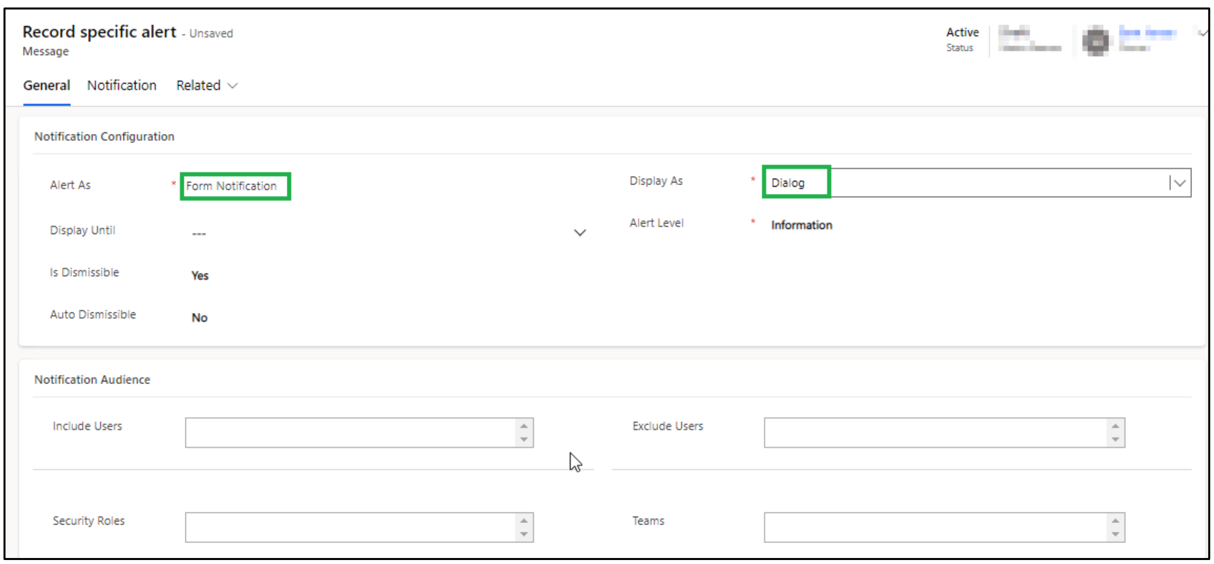
If user sets the alert as **'Pop up'** while configuring the message, an alert will show up only through the global notification bell button. It will not pop-up on opening of the record. User has to click on the bell icon to see the Pop up notification.

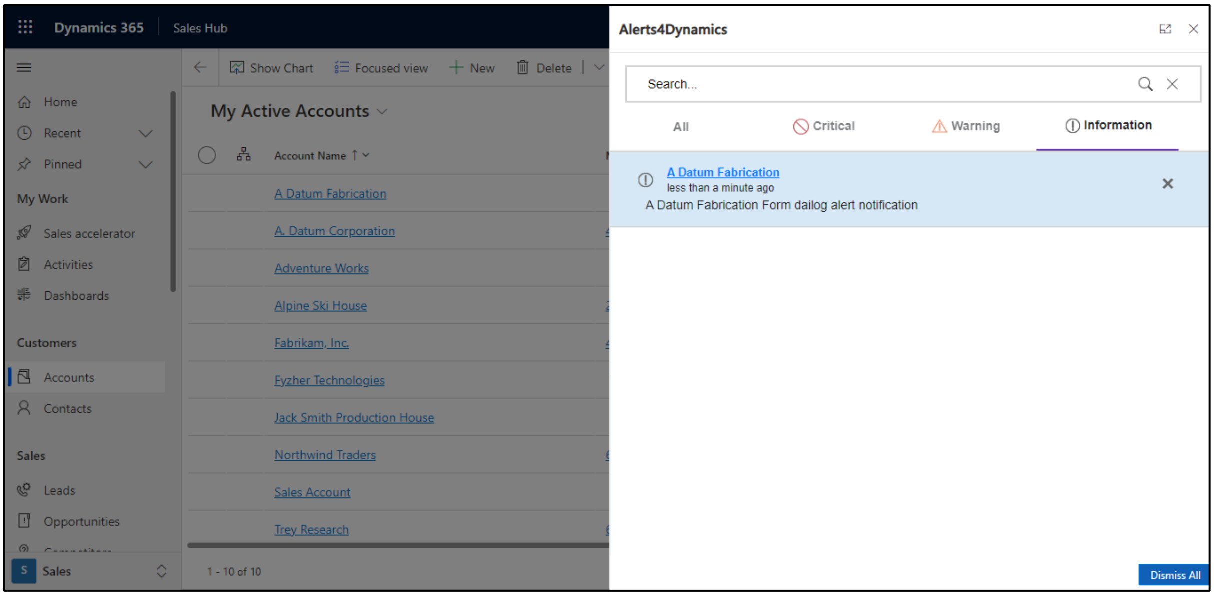




Alert as Form notification – Dialog

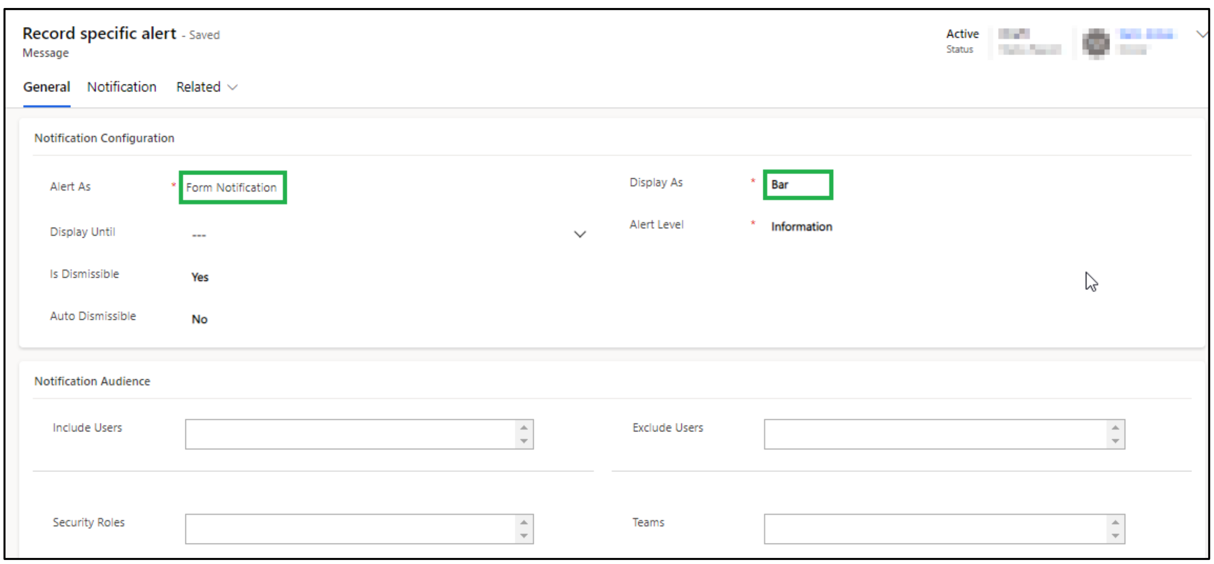
If user sets the alert as **'Form Notification – Dialog'** then the alert will pop-up after opening a record without having to click on the global notification bell icon.

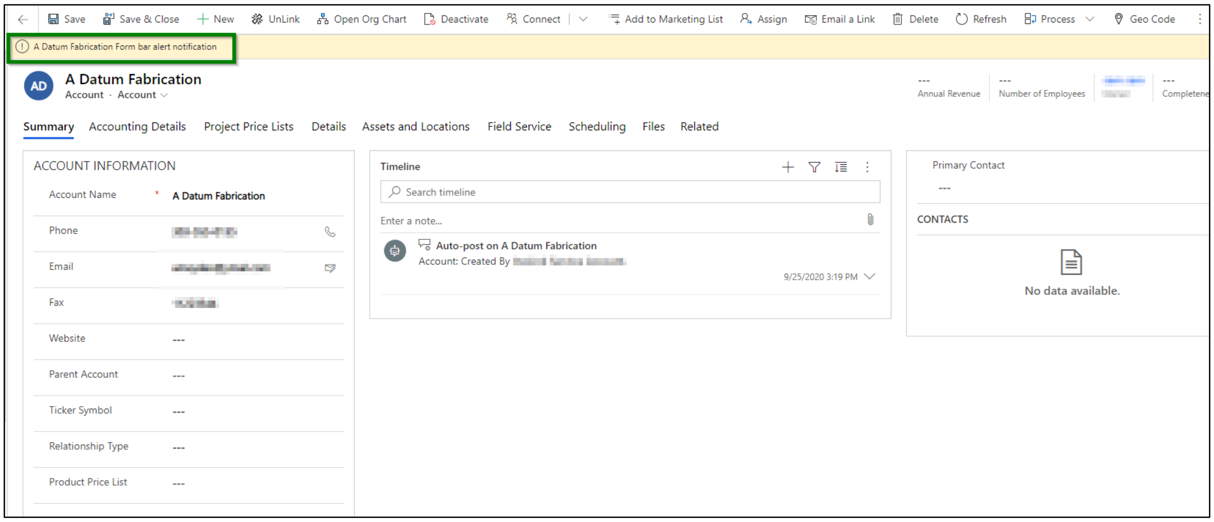




Alert as Form notification – Bar

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.

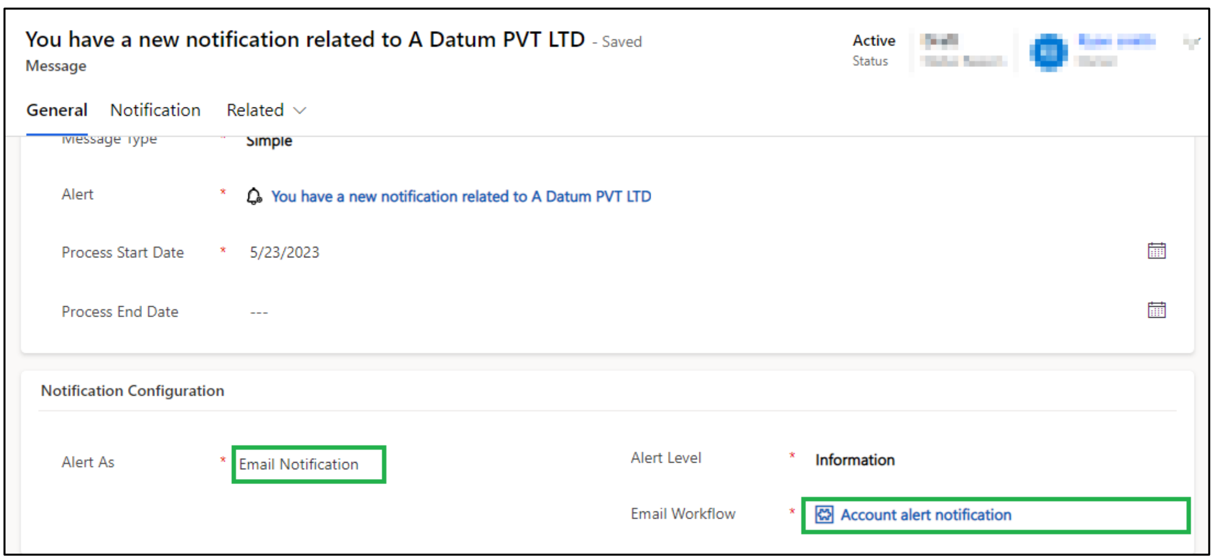


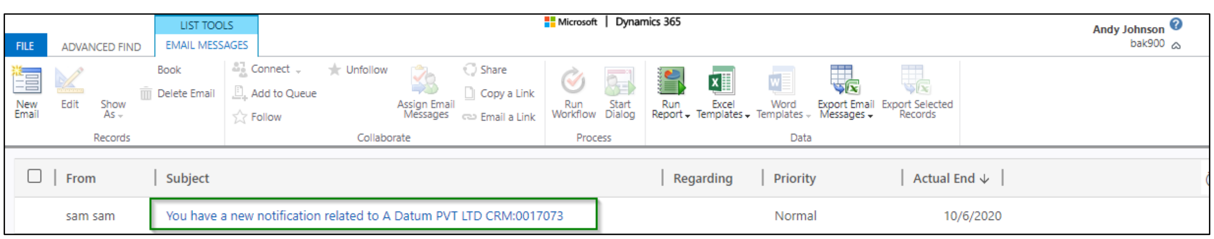


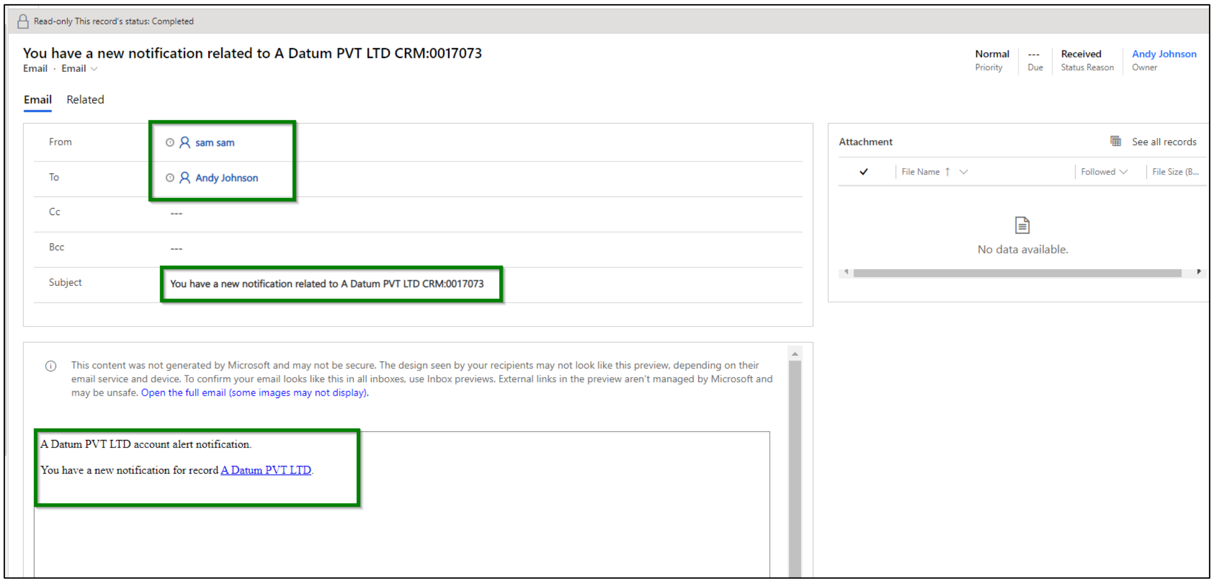
Note: An alert will be displayed through the global notification bell button only if checked from within the context of the record.

Alert as Email Notification

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







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:

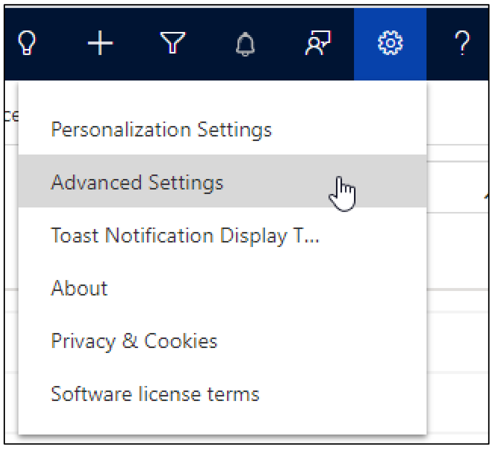
Admin will not be able to see an alert since an alert is configured as only **'User Preference'** and admin did not set any preference to receive an alert.

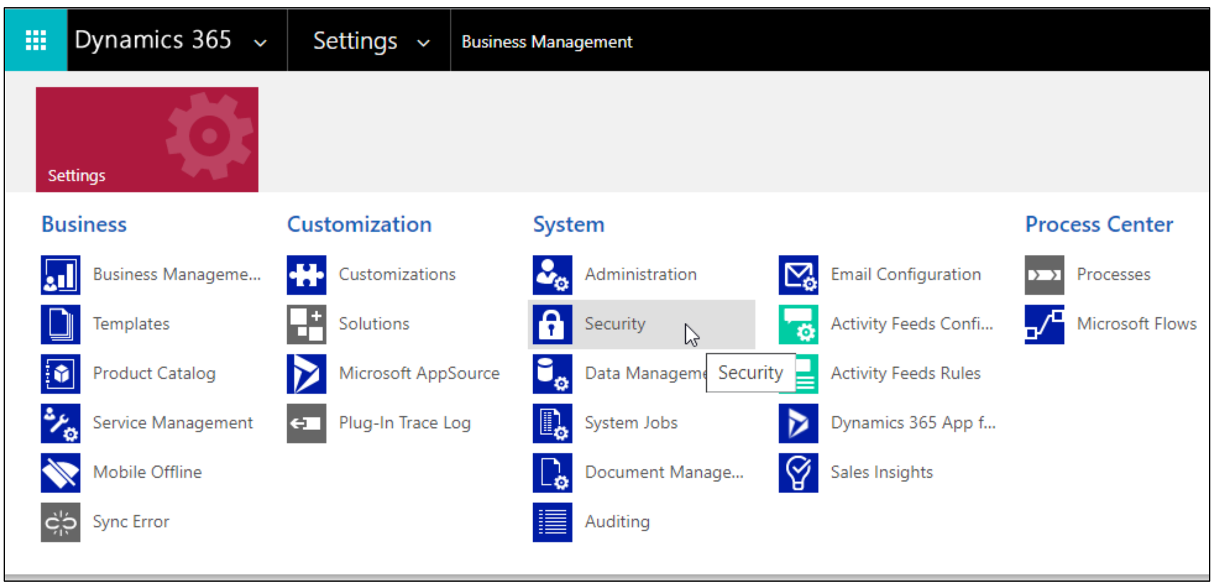
User 1 will receive an alert only through **Email**.

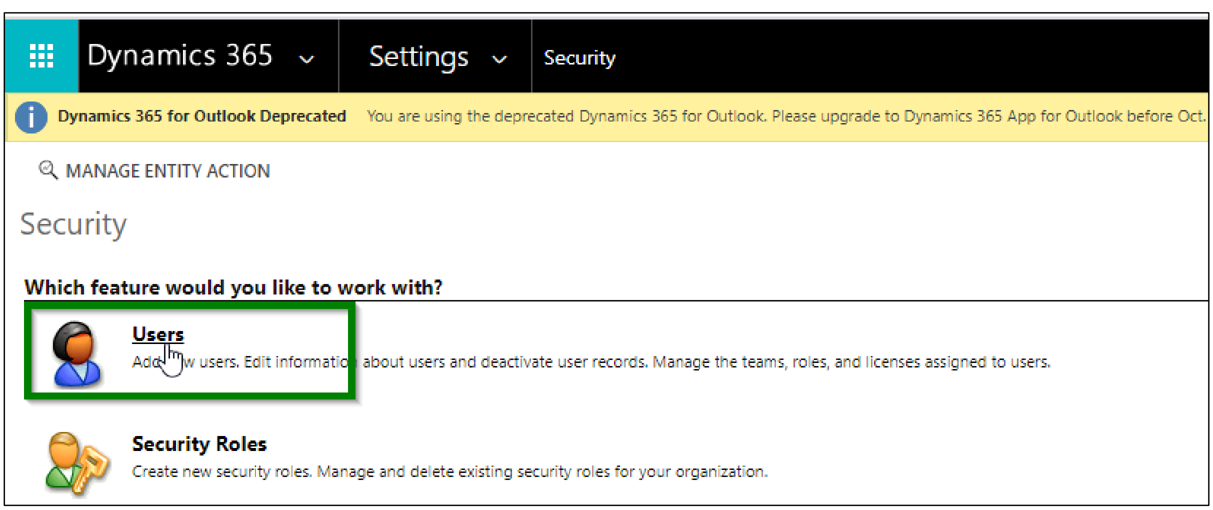
User 2 will be able to see an alert only as a **Pop up**.

Steps to set User Preference

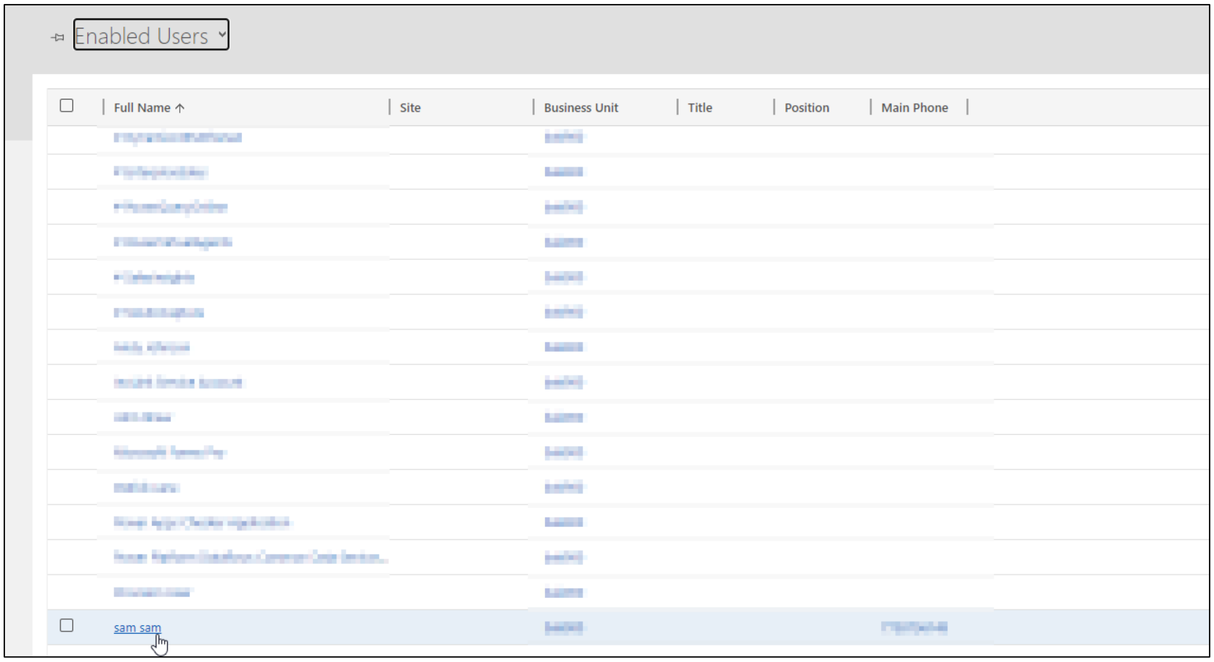
1) Navigate to **Advanced settings → Settings → Security → Users**.



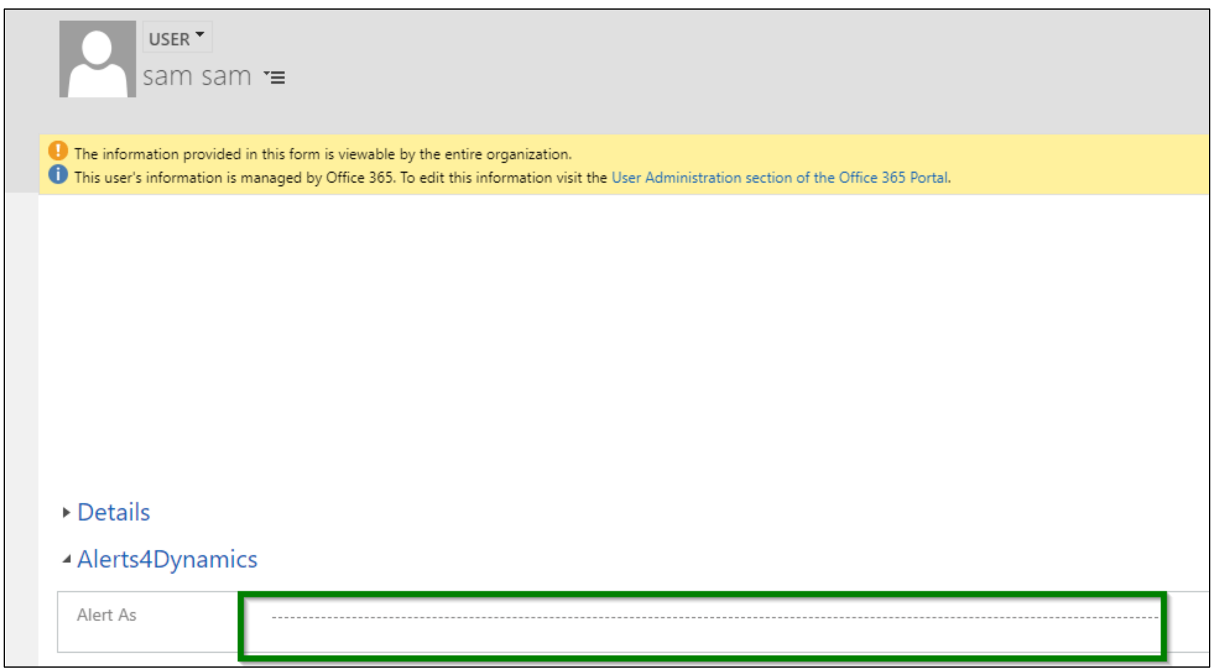




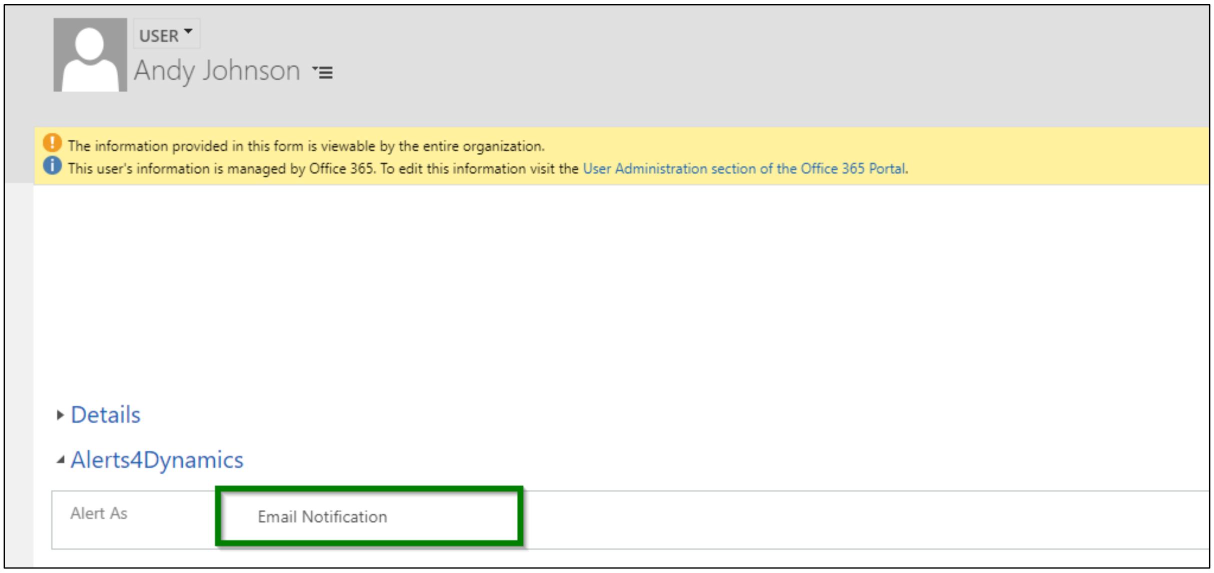
2) Open the user record.



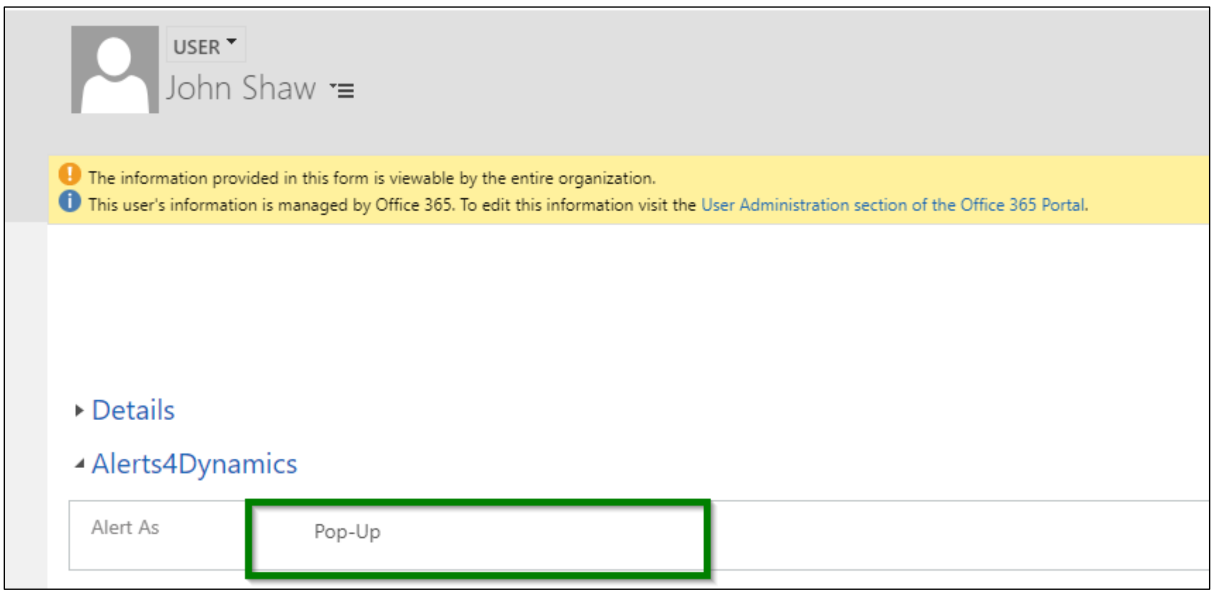
3) **For Admin** - Do not set any preference (make sure it is **blank**).



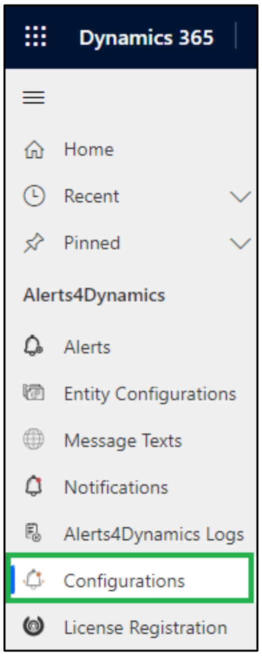
For User 1 – Set the preference as **'Email Notification'**.



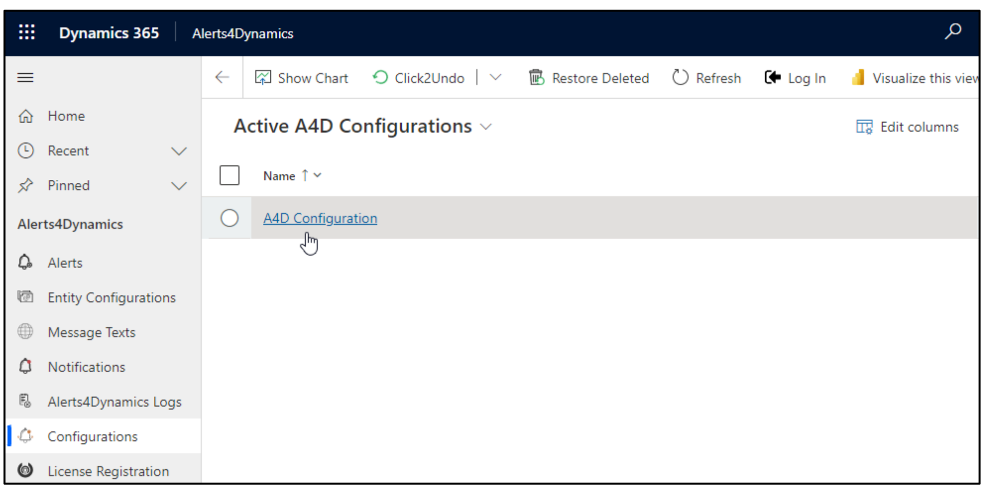
For User 2 – Set the preference as **'Pop up'**.



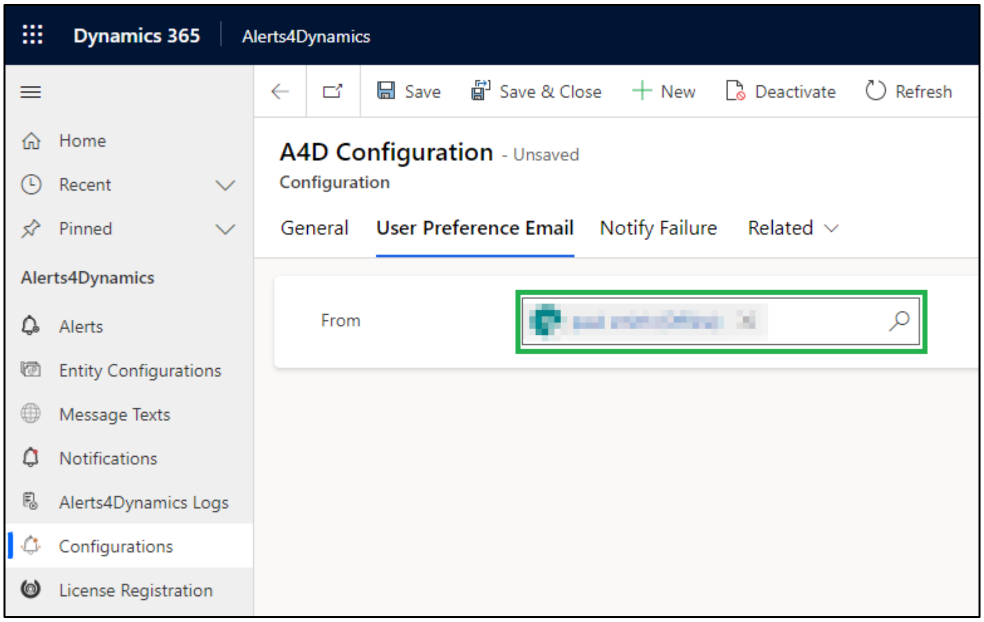
4) Next, select user from whom an email is to be sent as **‘From’** in Alerts4Dynamics configurations. For this, navigate to **Alerts4Dynamics app → Configurations**.



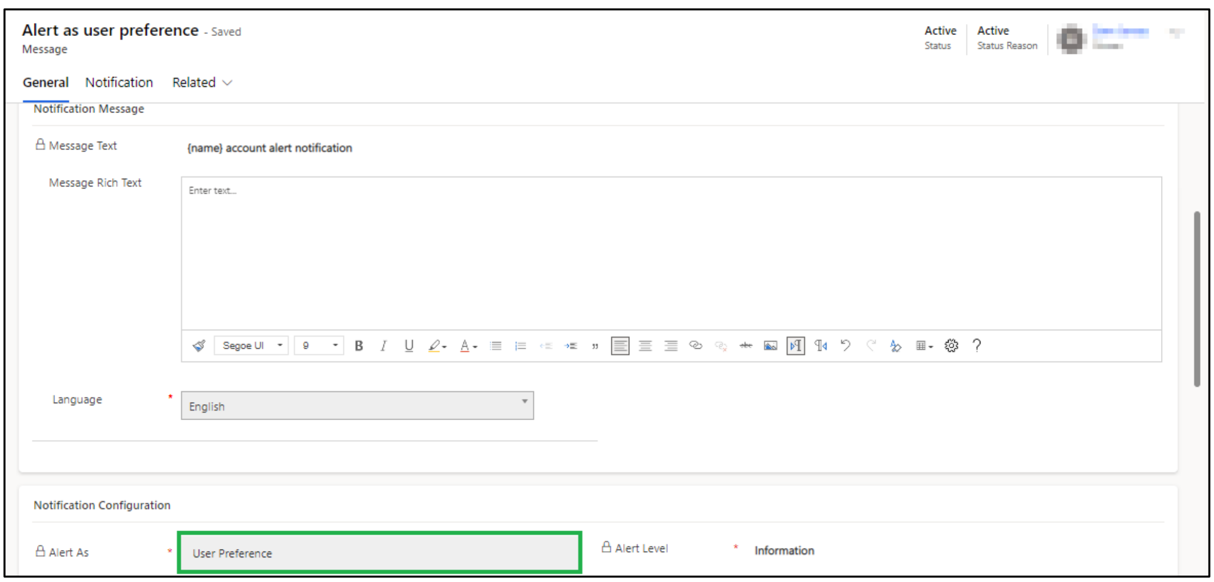
5) Open the configuration record.



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’).

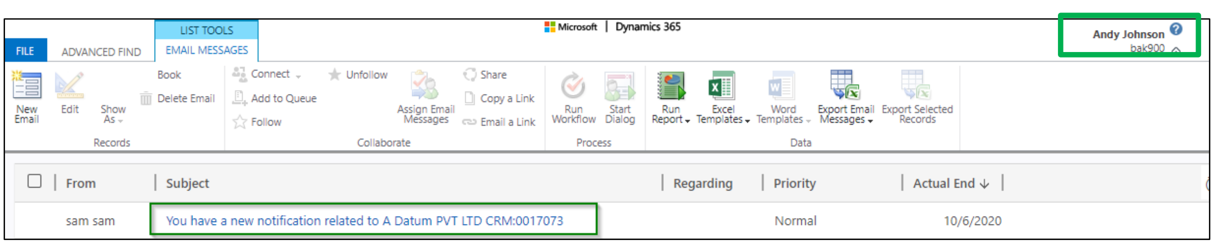


7) Configure and activate the message.

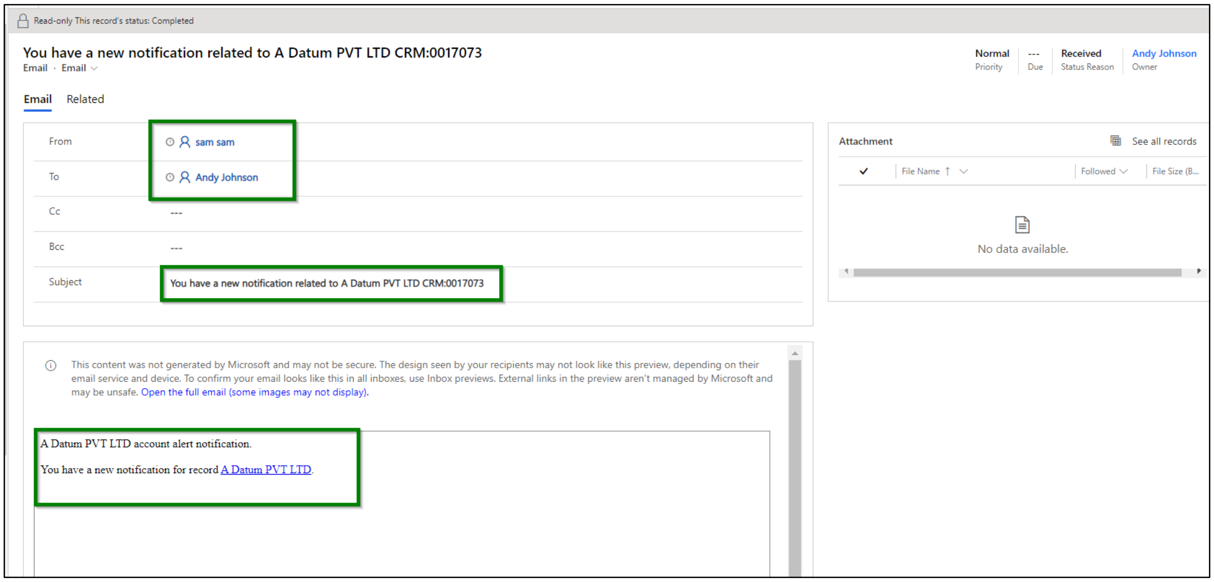


8) Once the message is activated:

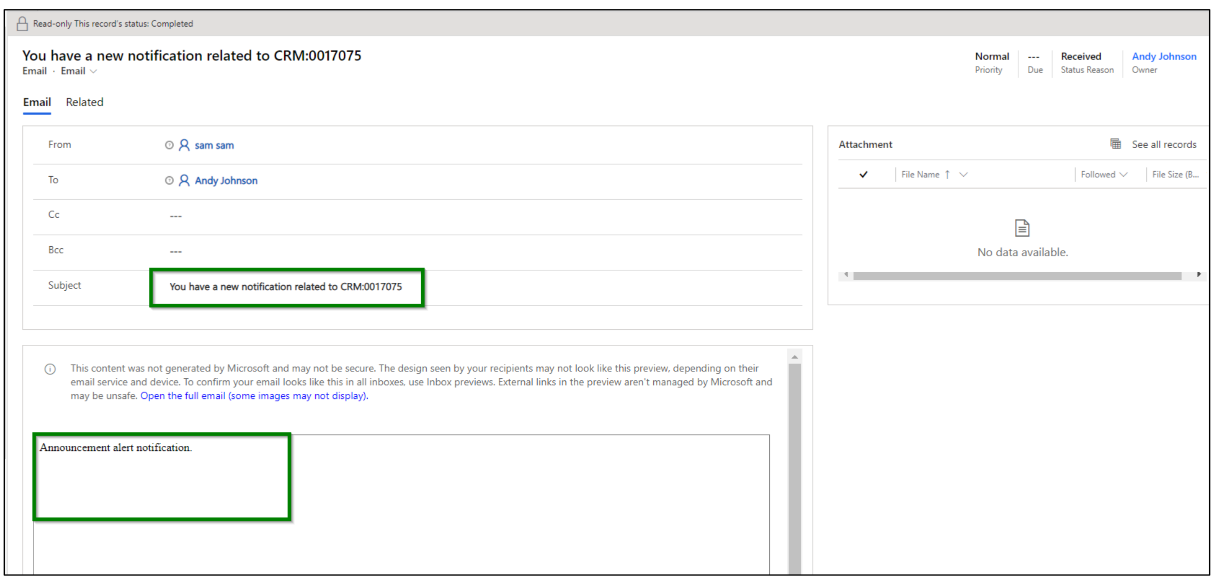
User 1 will receive an alert only through an **Email**.



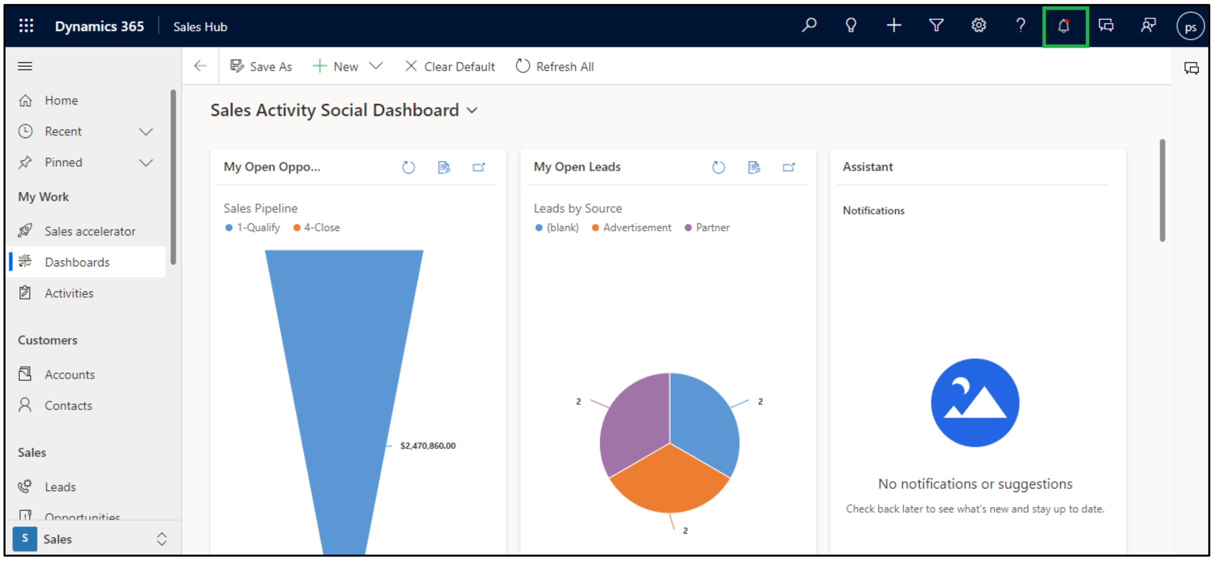
The user will be directed to the record page by clicking on the record link available in the email body.

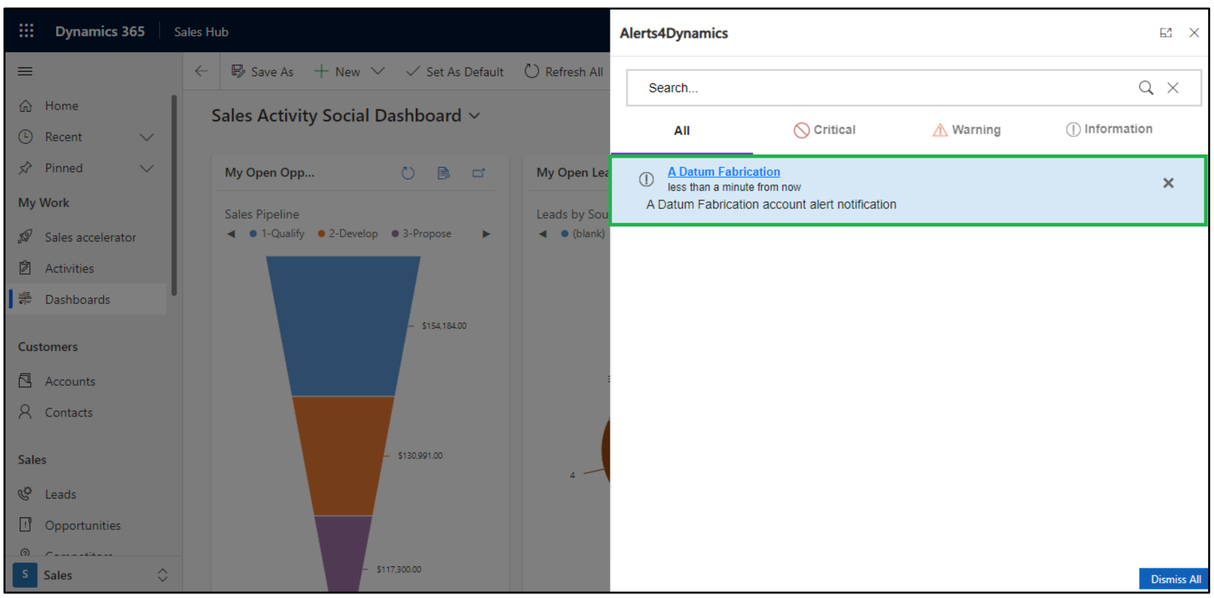


In case of an announcement alert being sent through an email, there will be no such link since announcements are not record specific.



User 2 will get an alert only through **Pop up**.





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

<u>Outcome:</u>

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

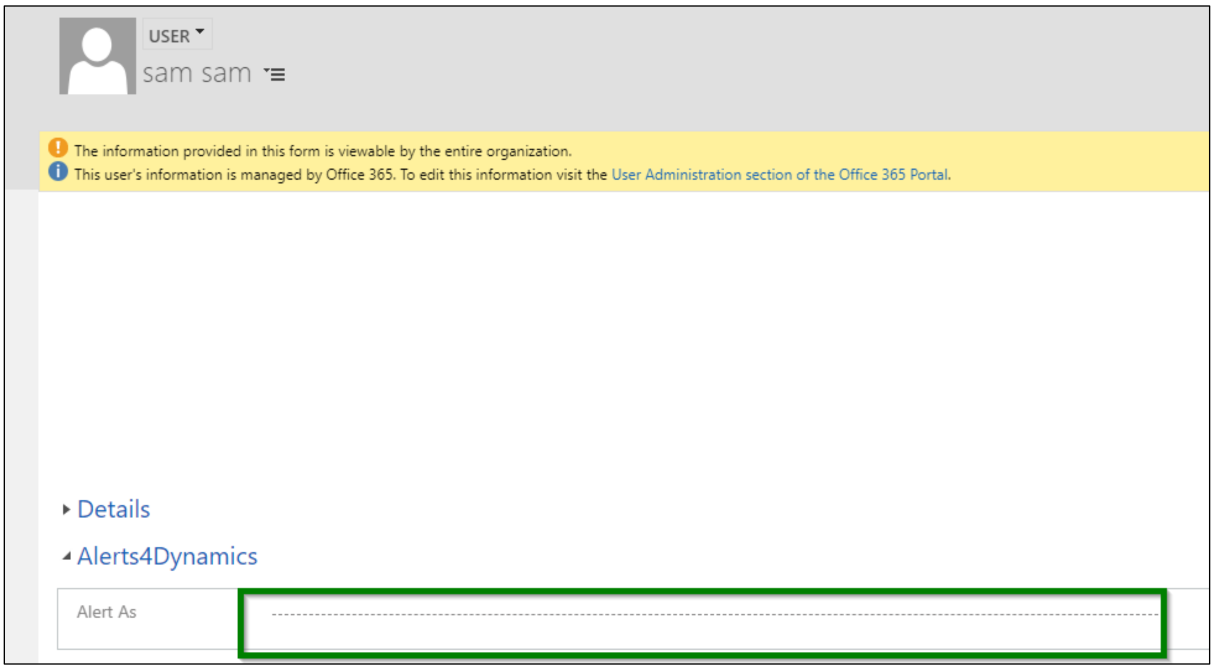
User 1 will receive an alert through an **'Email'** as well as **'Form Notification – Dialog'.**

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

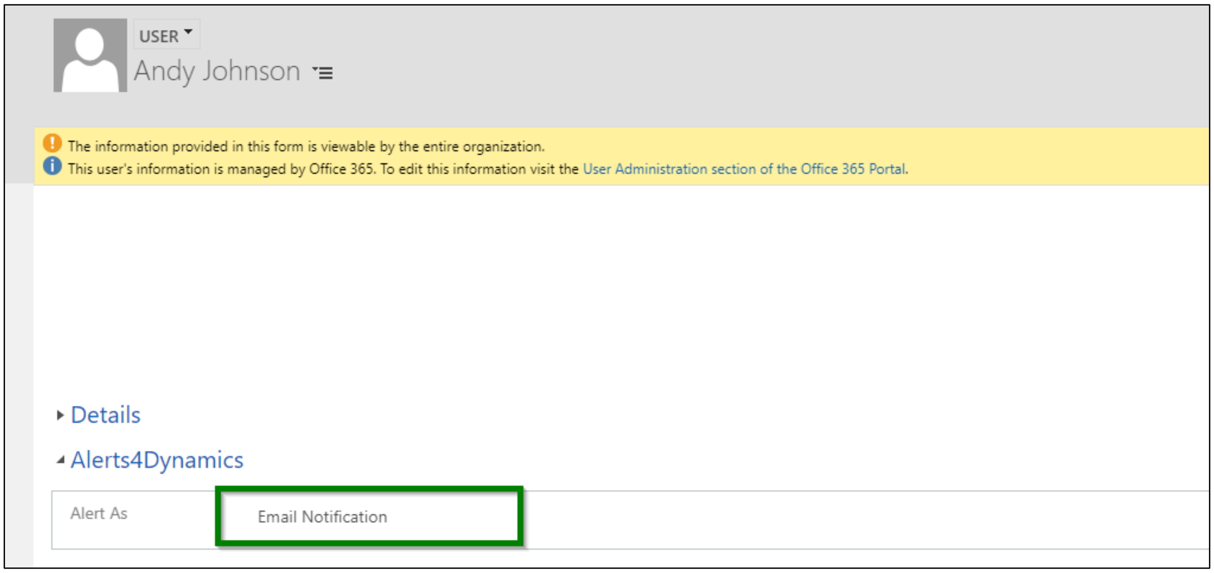
Steps to set User Preference

1) Set individual user preferences for an alert.

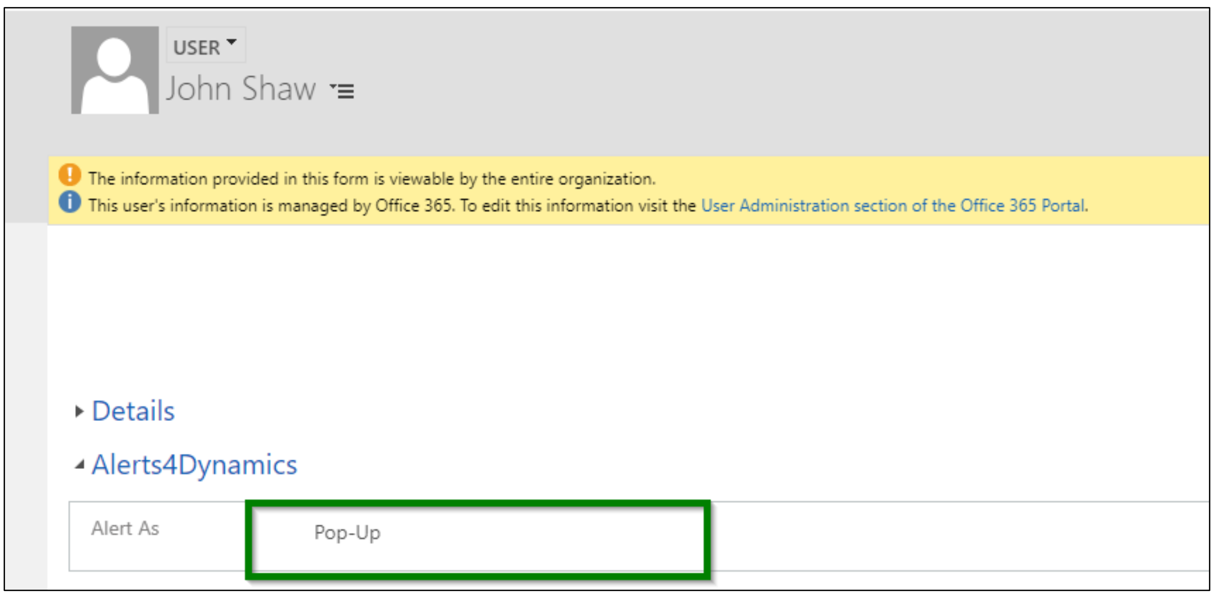
Admin – No preference:



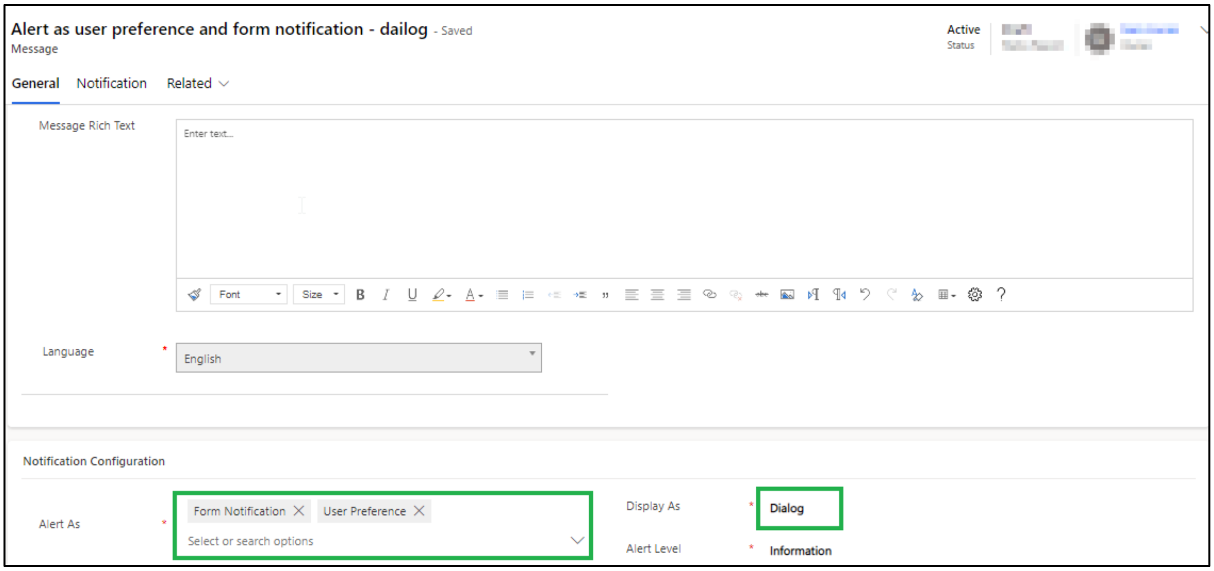
User 1 – Email Notification:



User 2 – Pop up:

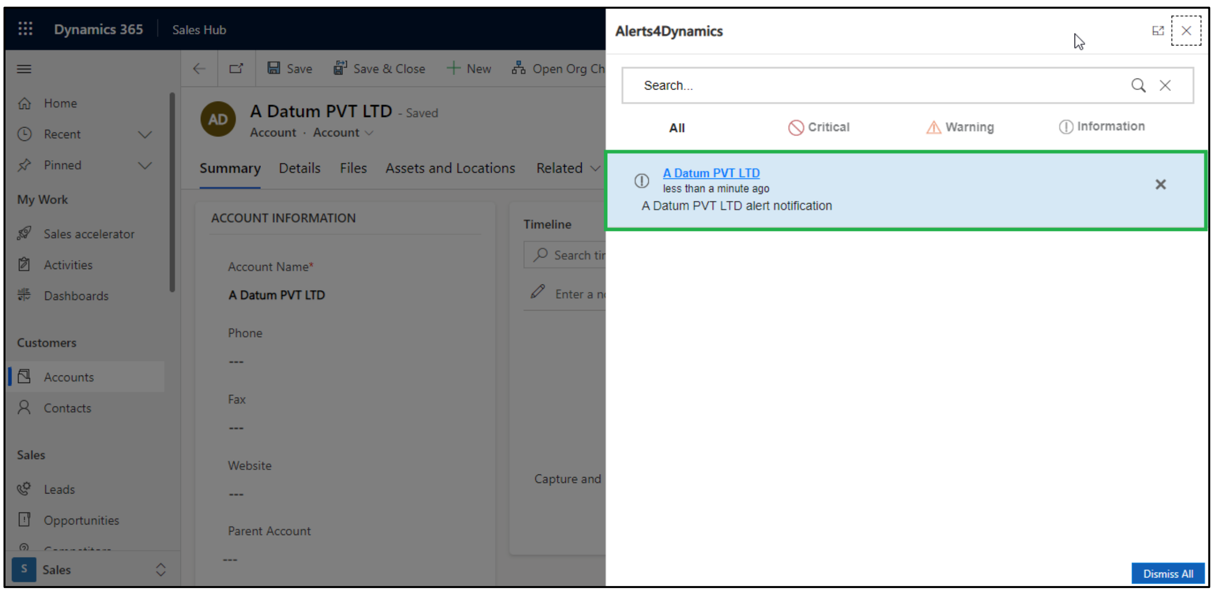


2) Configure the alert message.



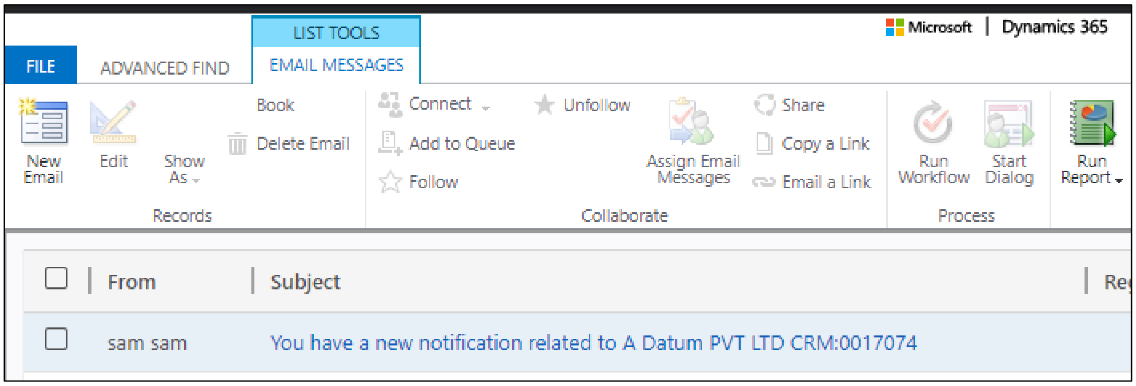
3) Once the message is activated;

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

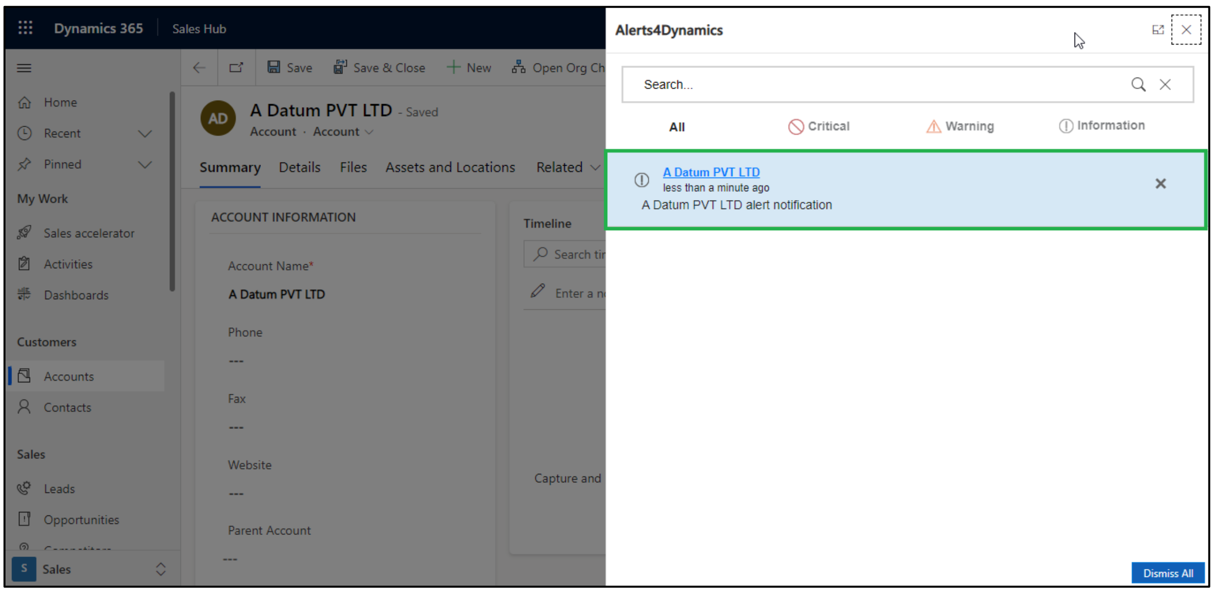


User 1 will be notified through both **Email** as well as **Form Dialog**.

As Email Notification:

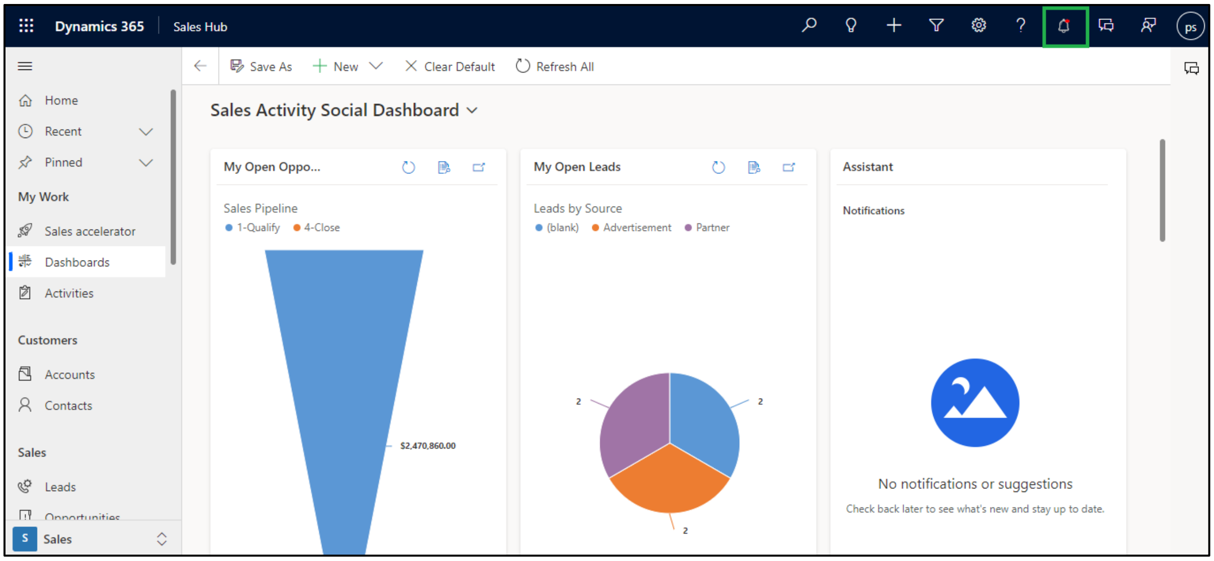


As Form Dialog:

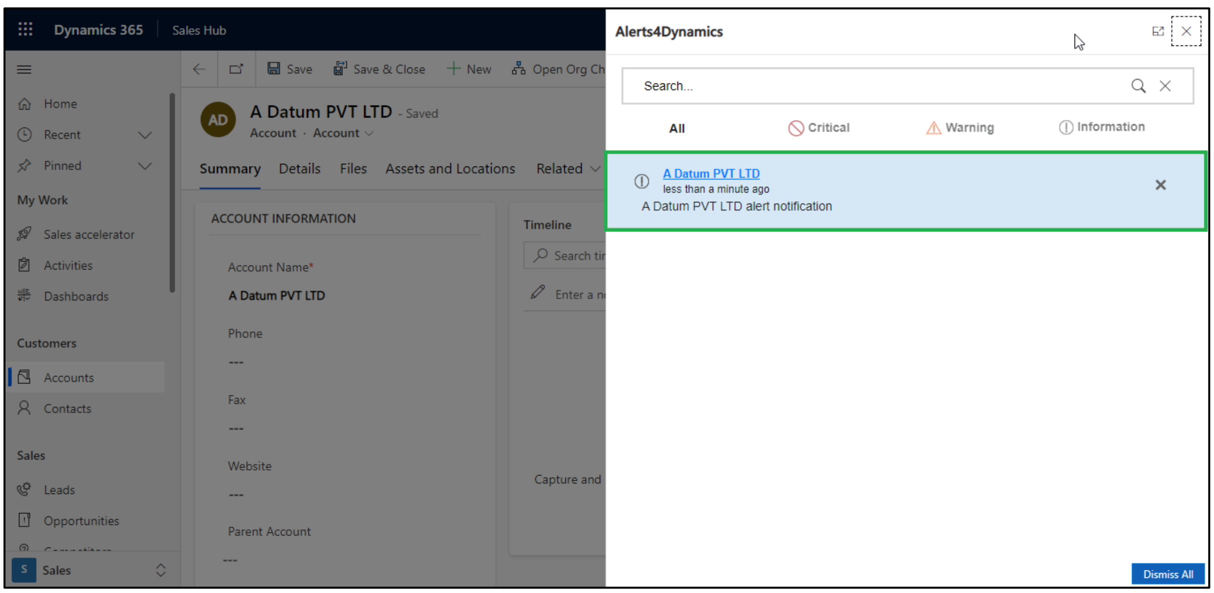


User 2 will be able to see an alert both as **Pop up** and **Form Dialog**.

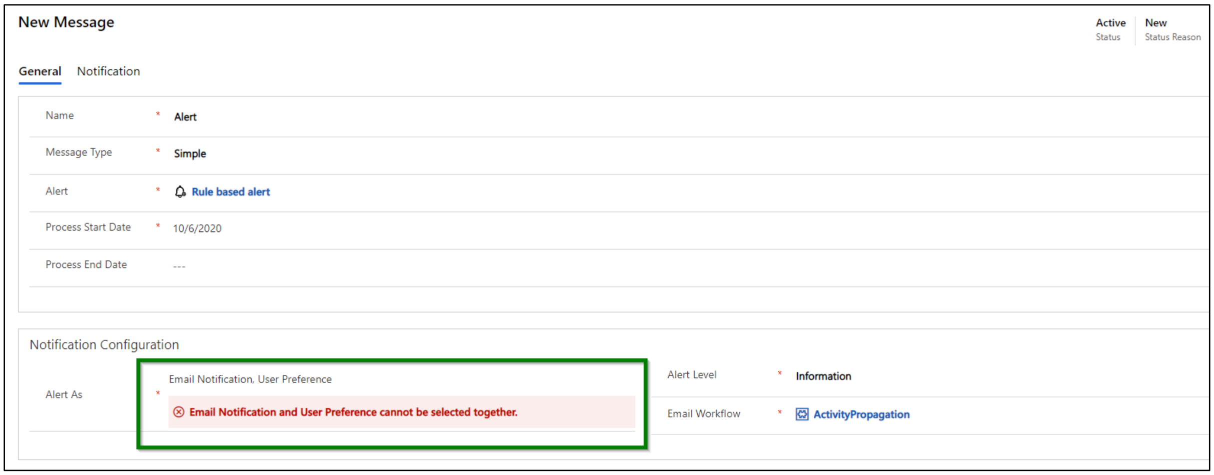
As Pop up:



As Form Dialog:



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



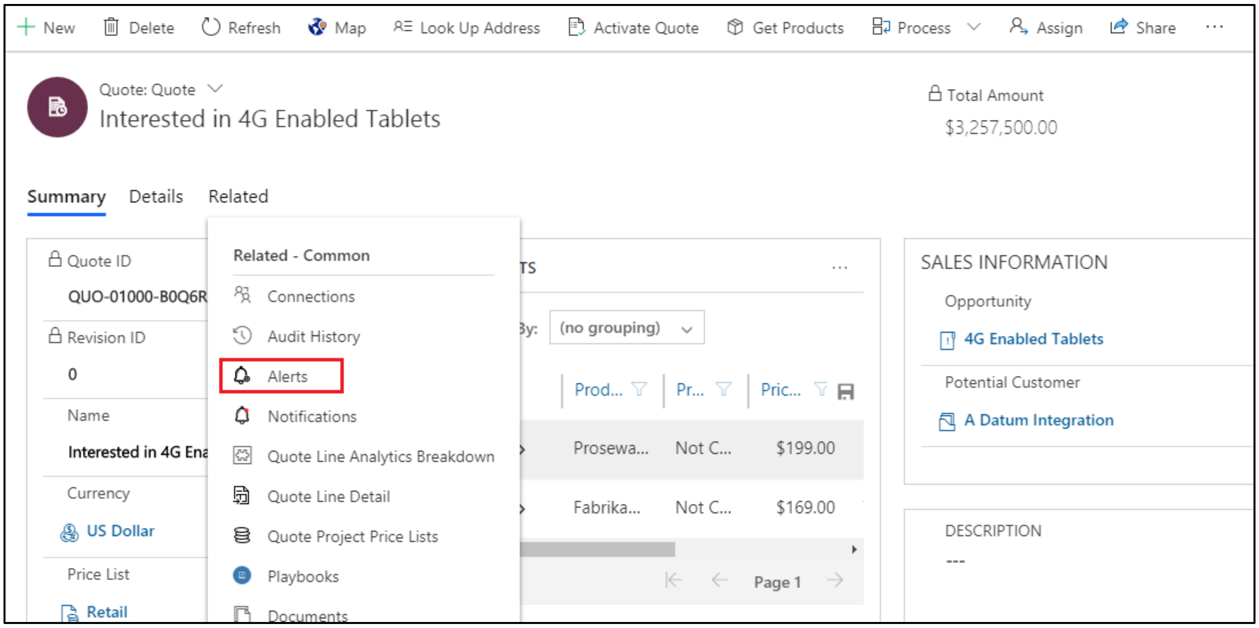
<u>Reason:</u>

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.

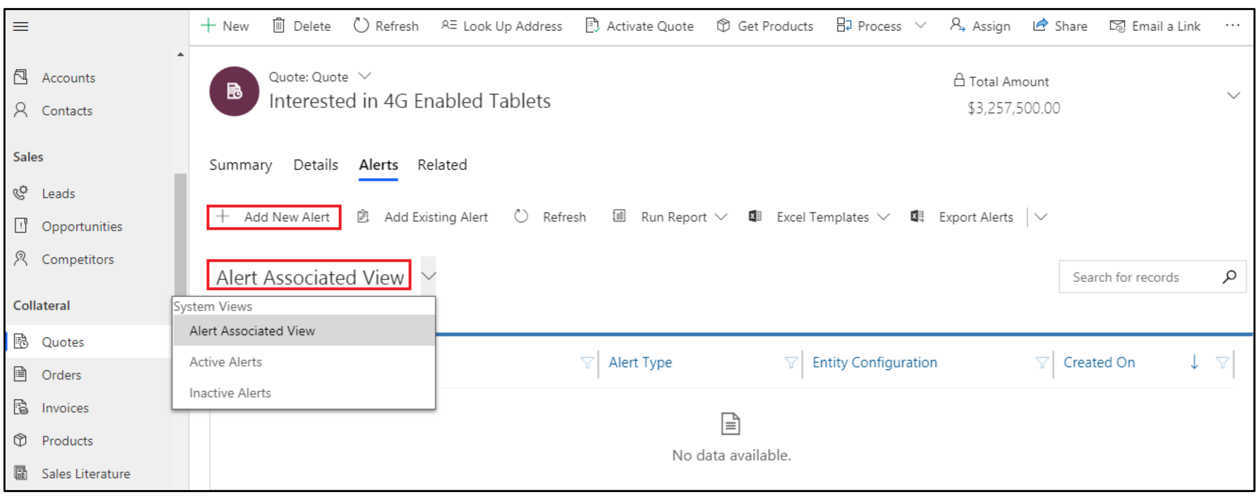
Record Based Alerts

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.

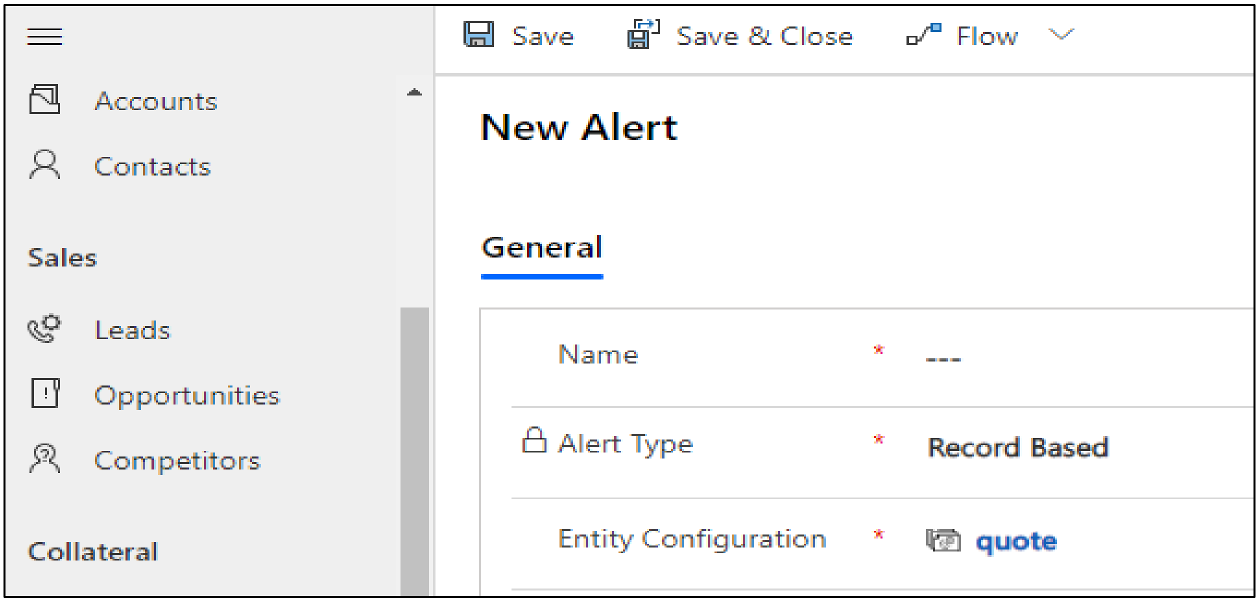
1. To create Record Based Alerts, navigate to the **Entity → Record → Related → Alerts.** For instance, if you want to create Alert for a Quote **Interested in 4G Enabled Tablets** go to **Quote** entity → record, **Interested in 4G Enabled Tablets** → **Related** tab → Select **Alerts**.



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.



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



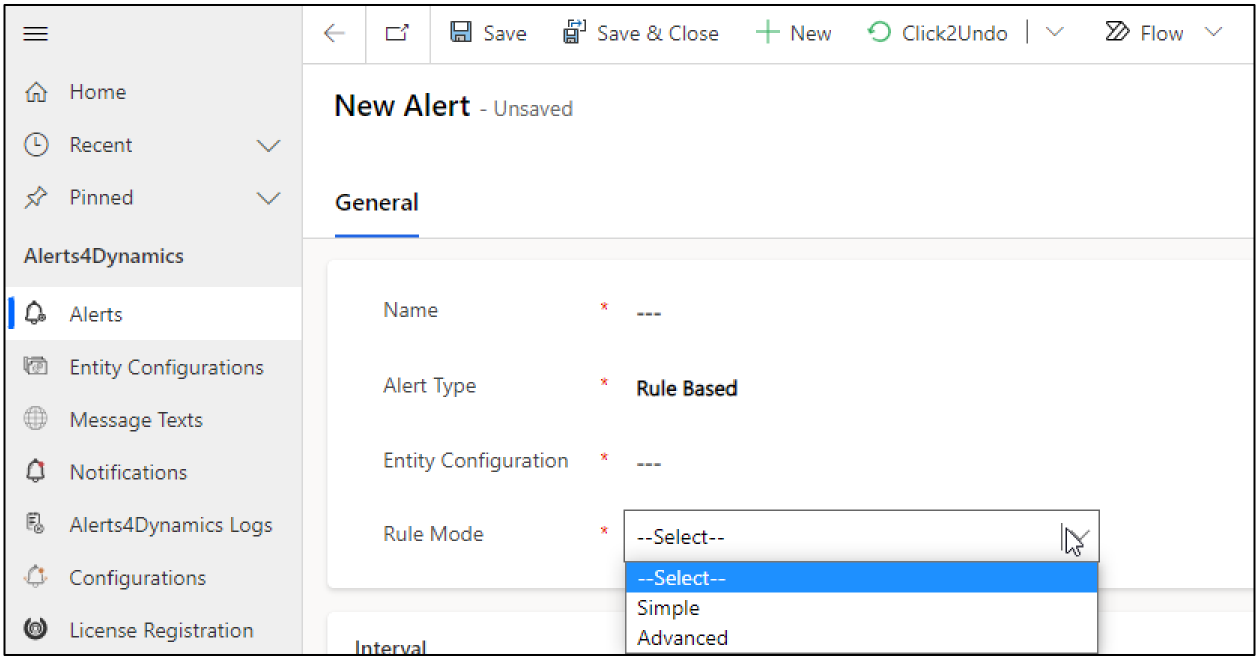
4. Add the **Name** of the alert and Save (**Alert Type** is auto-set to **Record Based** following this procedure). Once the **Alert** is created, next step would be to create **Message** against it**.** To know how to **Add New Message** skip to **Message** section.

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 → Alerts → New** and set the **Alert Type** as **Rule Based.** Select the **Rule Mode** as **Simple** or **Advanced.**

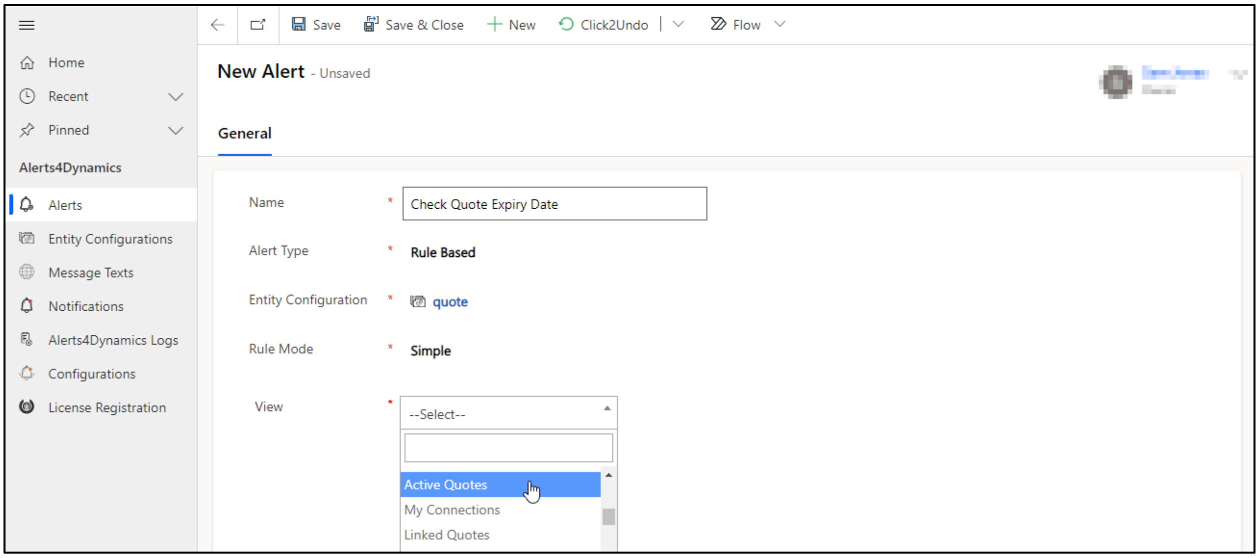


Fill the fields:

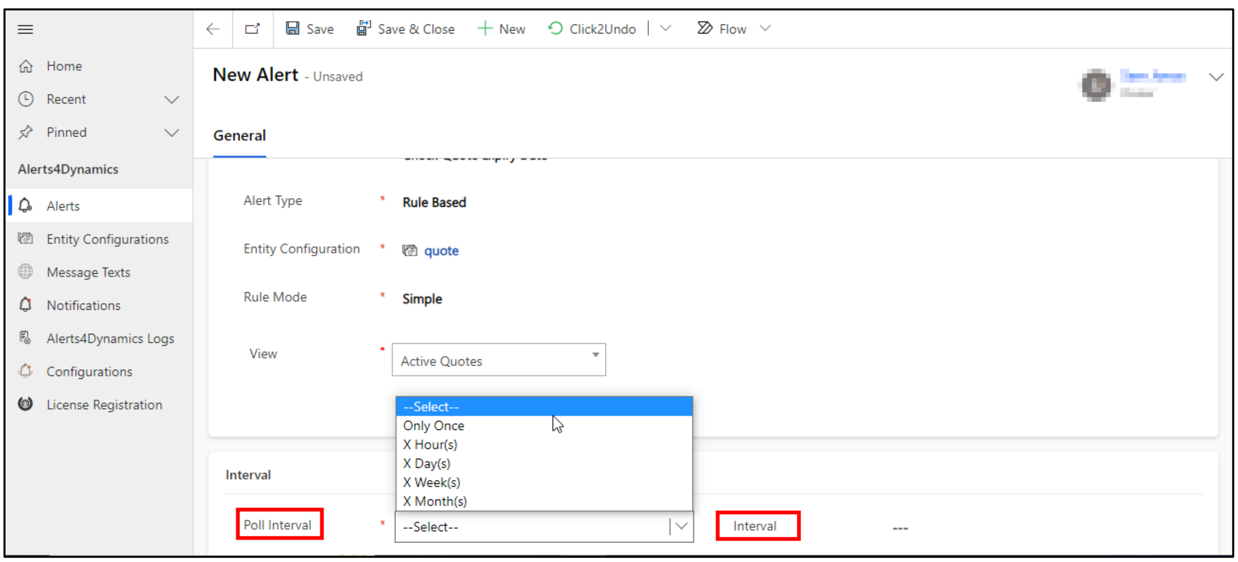
- **a) Name:** Enter a suitable name for this Alert.
- **b) Alert Type:** Select the type of alert you are creating. Here you have the option to choose **Rule Based** or **Announcement.** Select **Rule Based** from the dropdown.
- **c) Entity Configuration:** Select the Entity Configuration.
- **d) Rule Mode:** Select Simple or Advanced based on your requirement. (This option only appears for Rule Based alerts.)

<u>Simple Alerts</u>

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.



b) Select the **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.

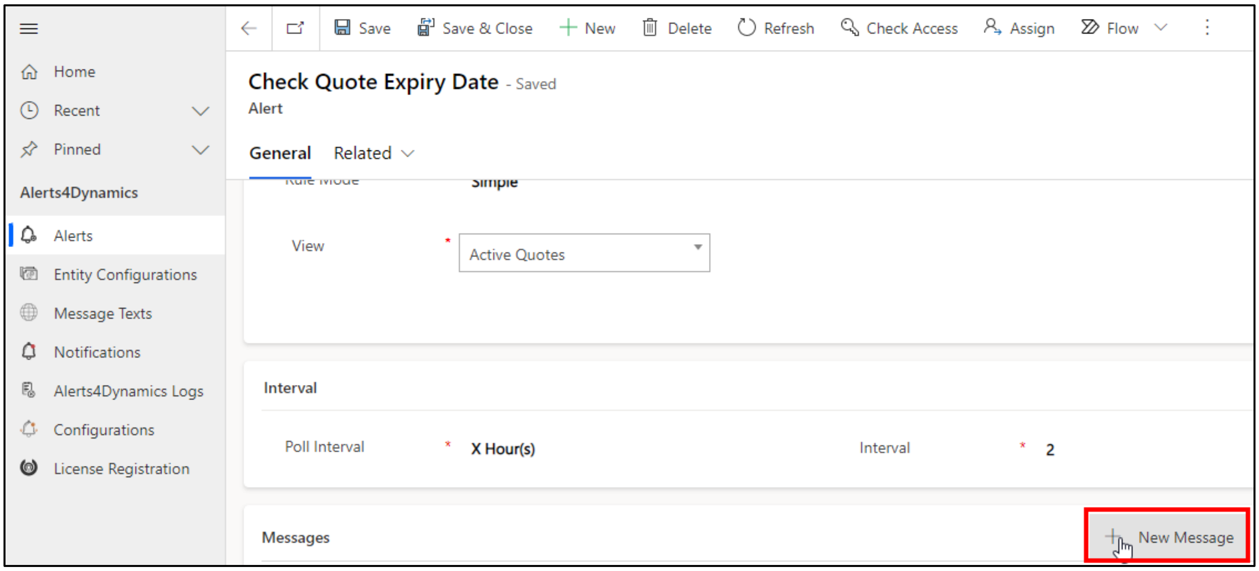
iii. **X Day(s):** New records in the defined condition are checked for in every X Day(s). If new records are found based on the defined condition, new notifications are created for them.

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 **Message** section.



Advanced Alerts

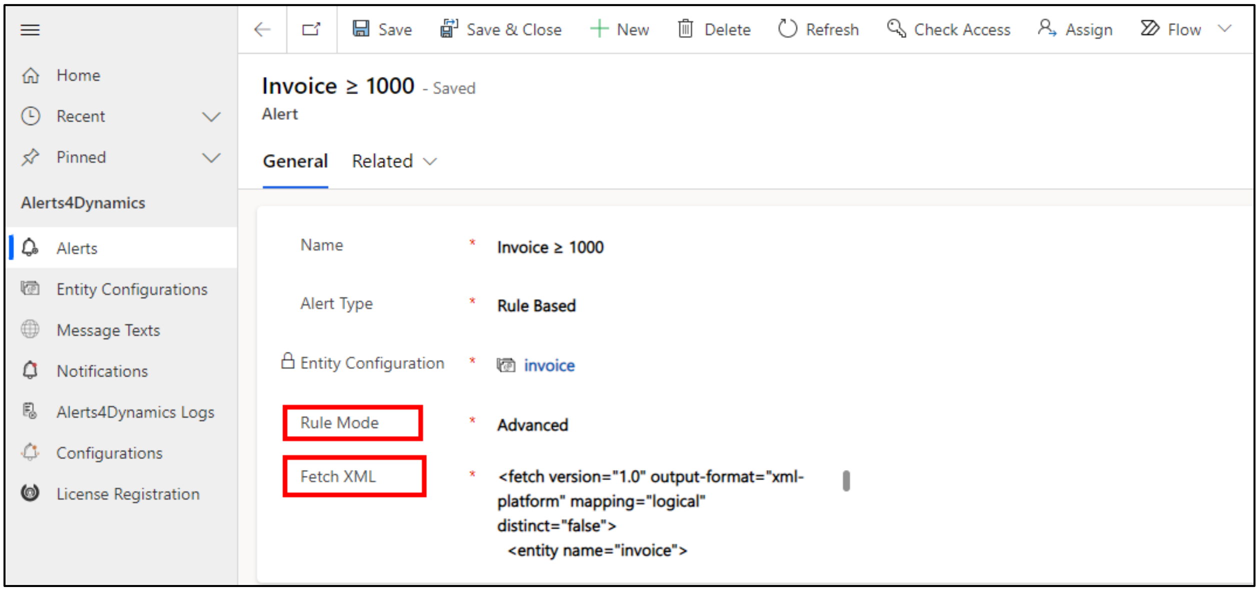
Alerts can be created based on conditions.

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.

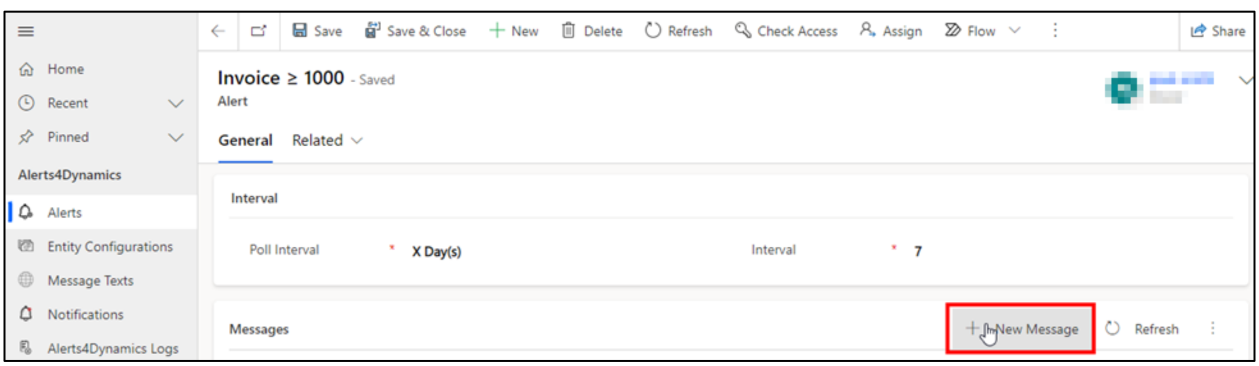
```
<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">
  <entity name="invoice">
    <attribute name="name" />
    <attribute name="customerid" />
    <attribute name="statuscode" />
    <attribute name="totalamount" />
    <attribute name="invoiceid" />
    <order 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**.**



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



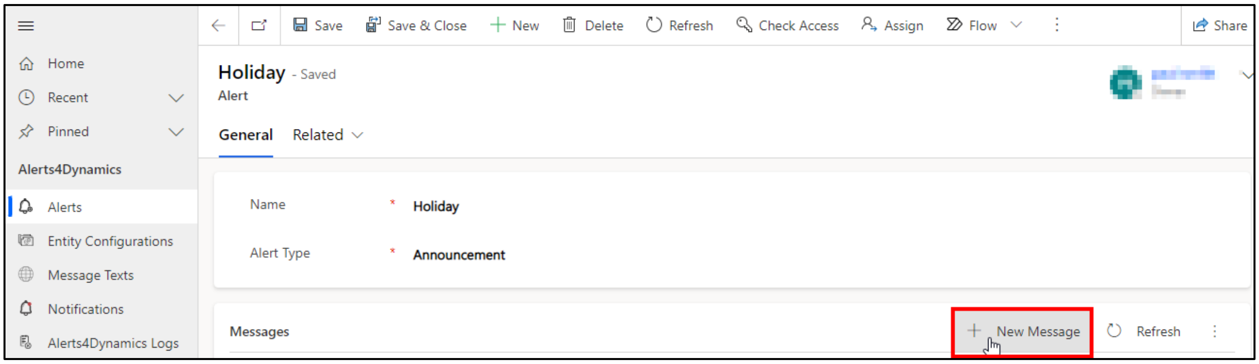
Announcement

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 → Alerts → 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 **Message** section.

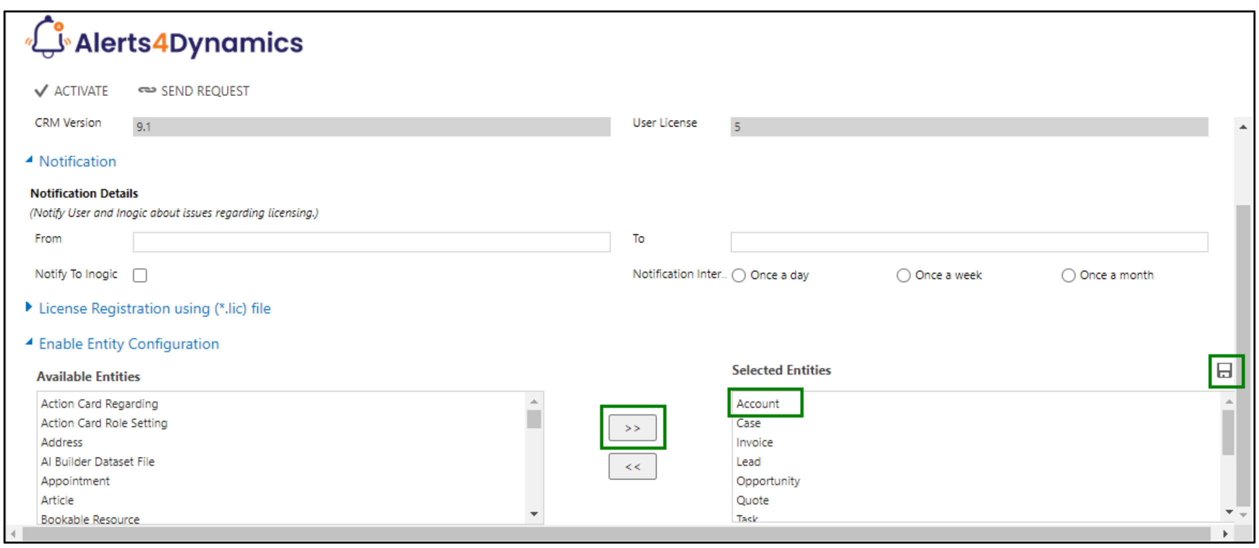


Event Based Alerts

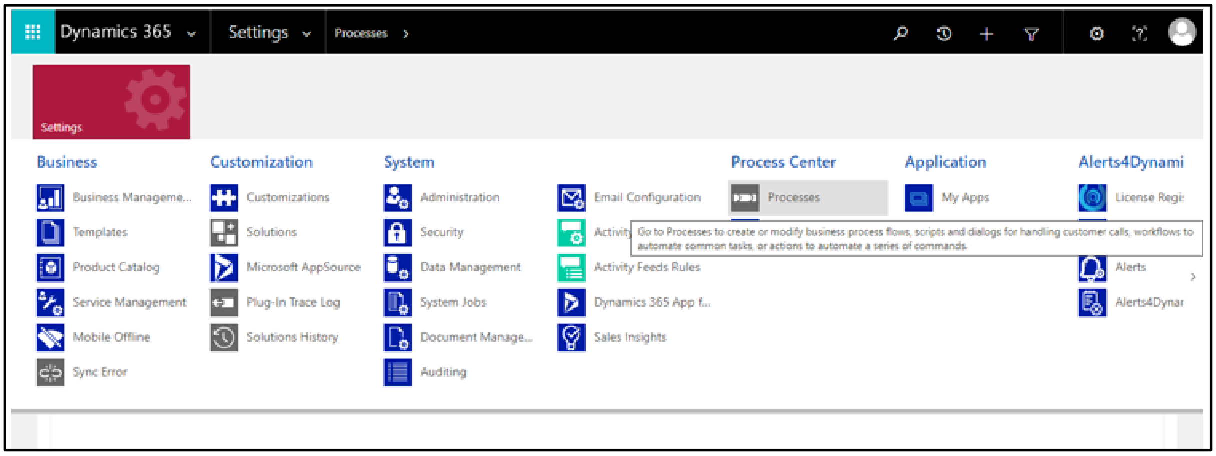
Alerts4Dynamics gives user a provision to show an alert with respect to any event that happens in the CRM. For example, user wants an alert to be shown automatically once a new record is created within the selected entity. This can now be easily achieved using **'Event Based Alert'** feature of Alerts4Dynamics.

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.

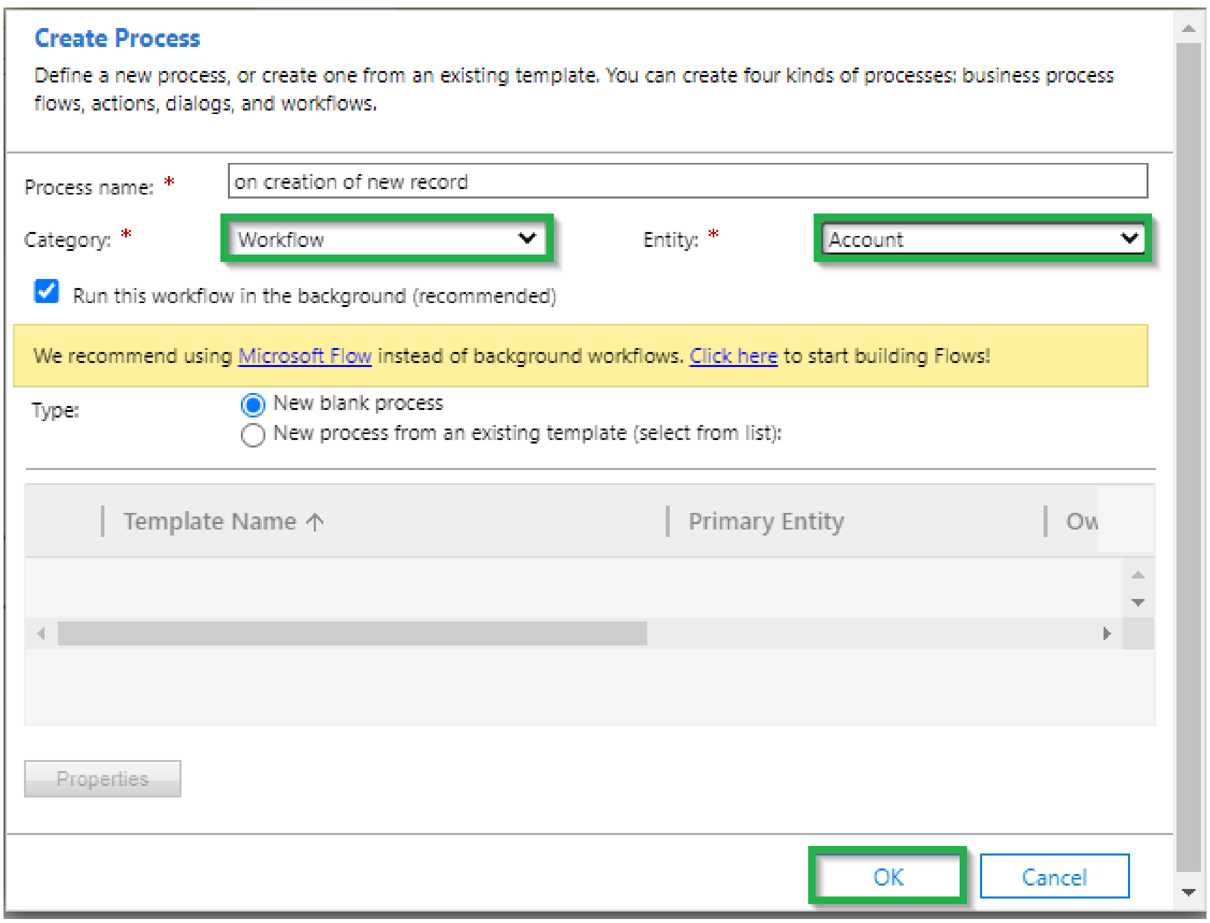


2) Once entity is enabled, navigate to Advanced Settings → Processes → Create New process.



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'**.

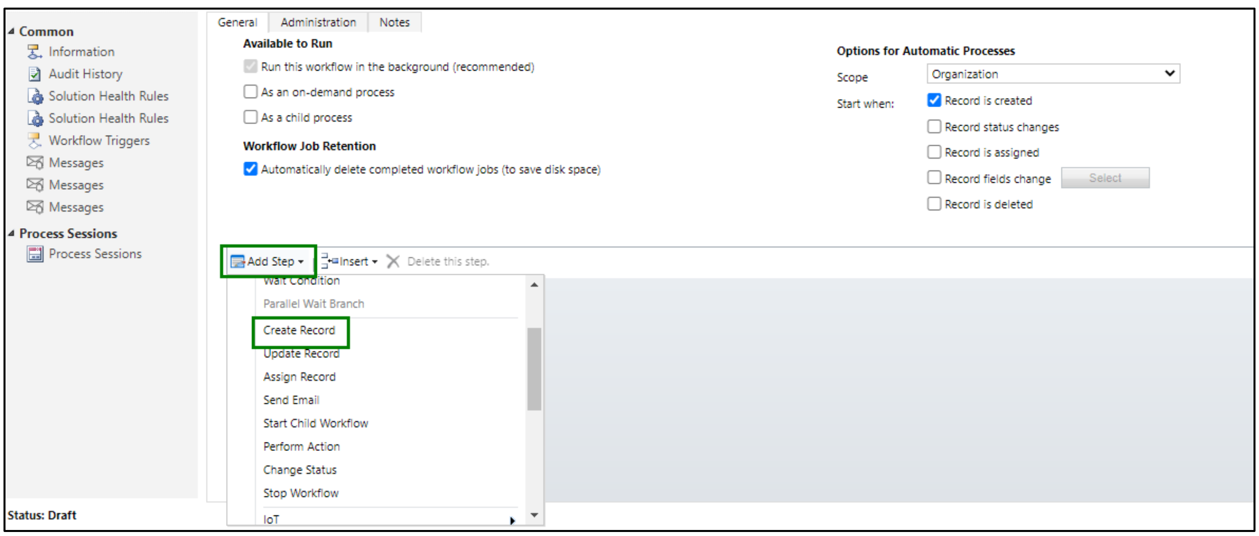


4) Select the event on which you want the notification to created :

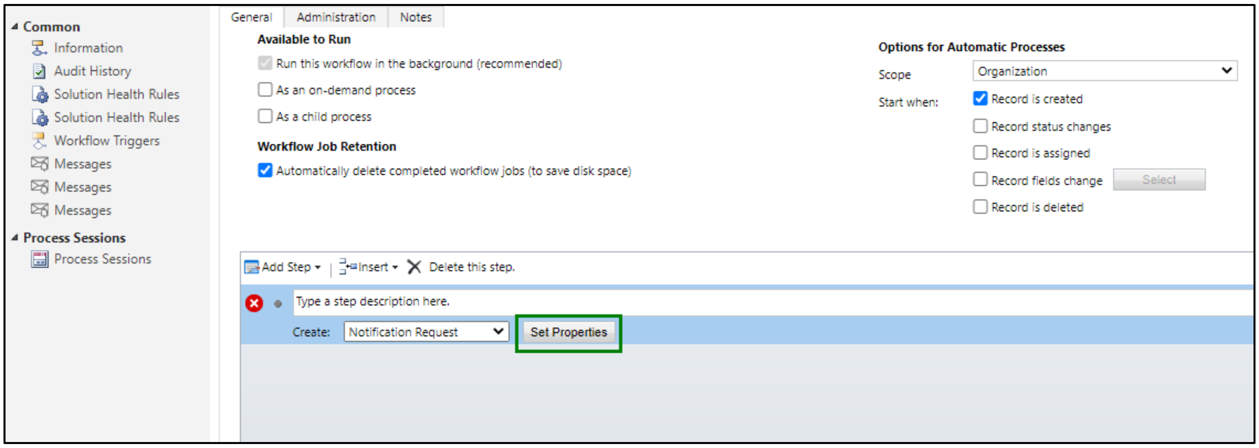
We are selecting '**Record is created**' checkbox since we want an alert to be displayed for the record that is newly created in the system.

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

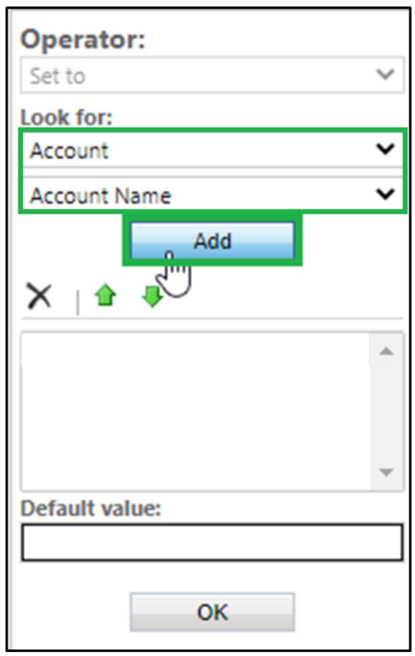
Please follow the below steps for creating notification request entity record.
Select Add Step → Create Record → Select 'Notification Request' from the dropdown.



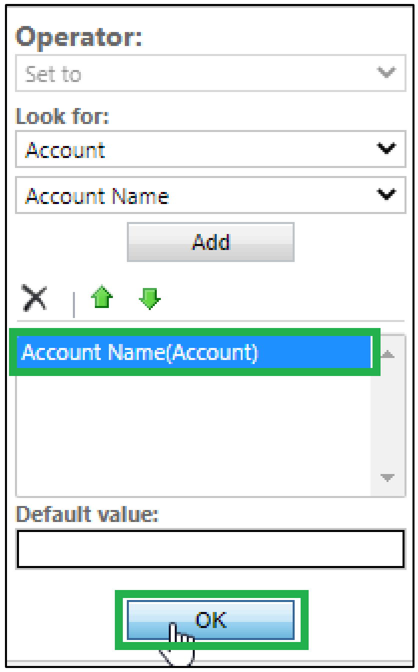
6) Click on **'Set Properties'**. Here, you will find similar fields necessary for configuration as we do in other types of alerts.

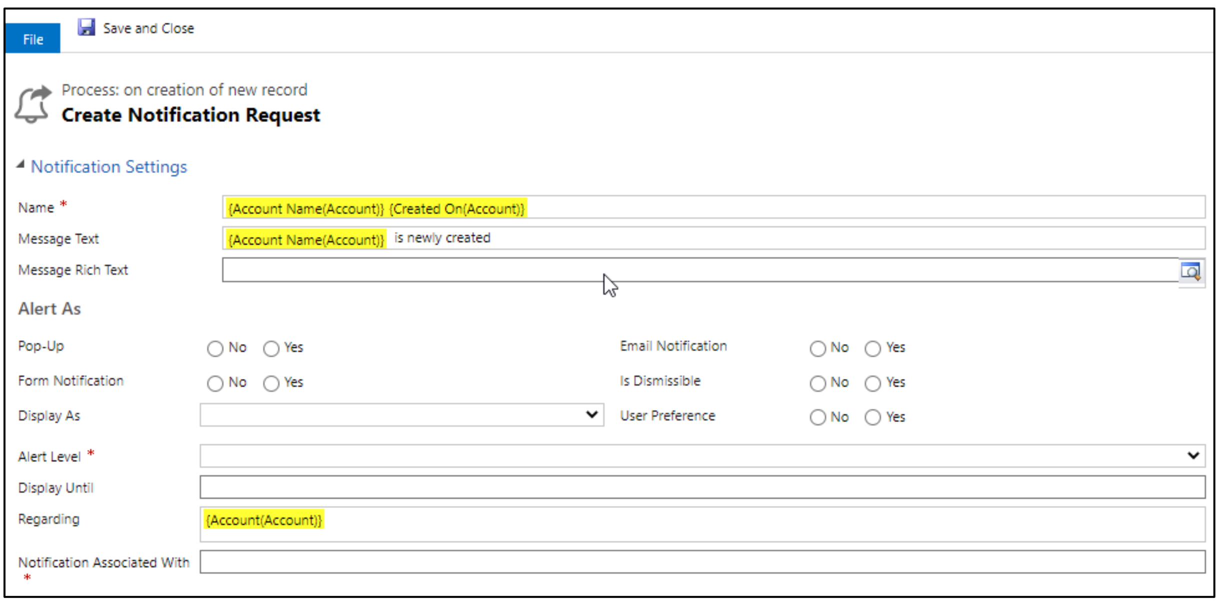


7) Fill in the following details:
   - **Name** – Enter some valid name for the Notification Request record.
   - **Message text** – Enter some valid text (You can also select dynamic value).



8) 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.

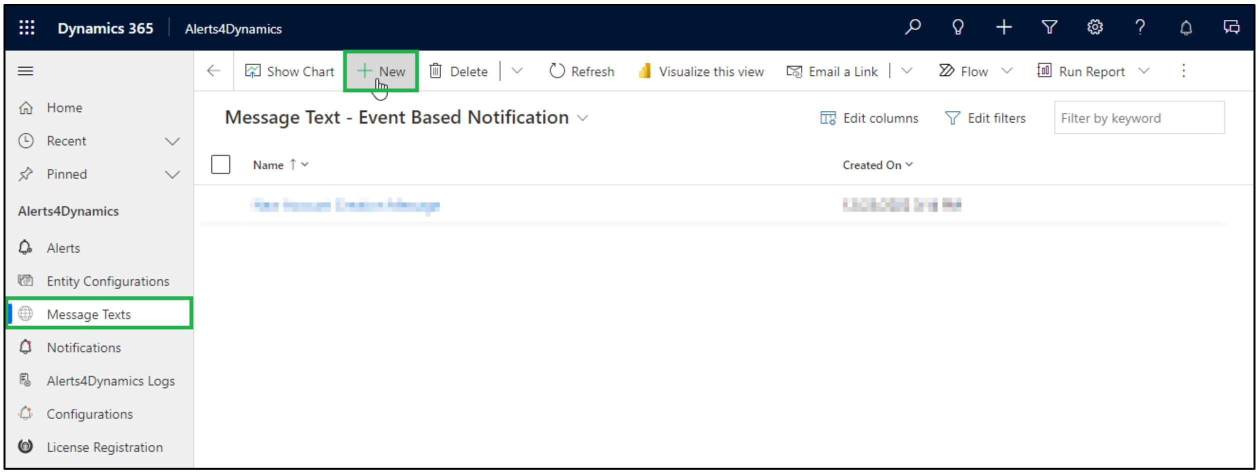




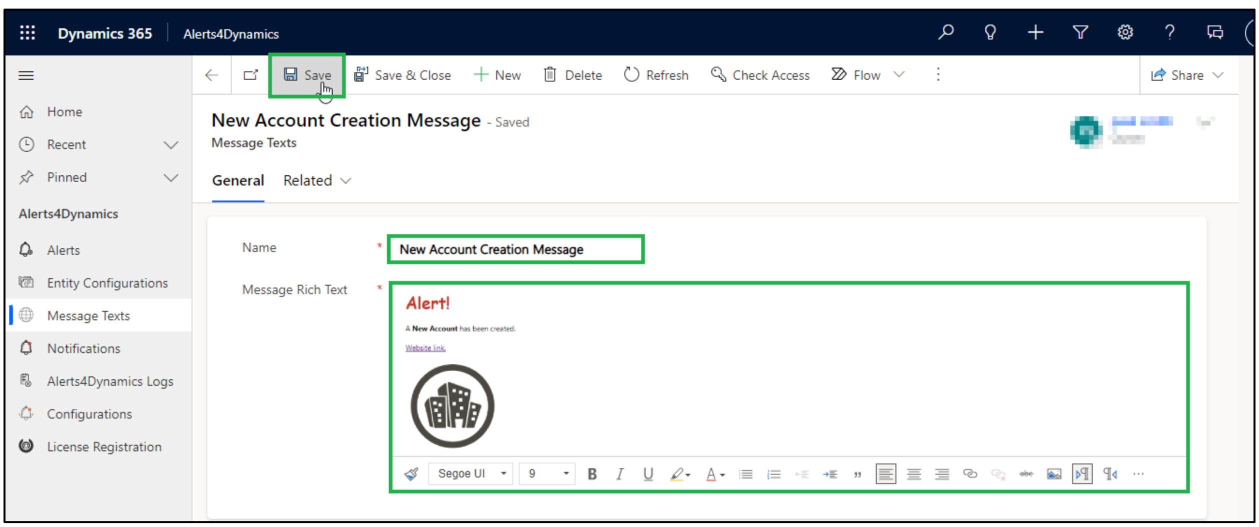
9) **Message Rich Text -** Select the appropriate Message Text from the lookup. For Message Text to appear in the lookup users need to create Message Text.

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

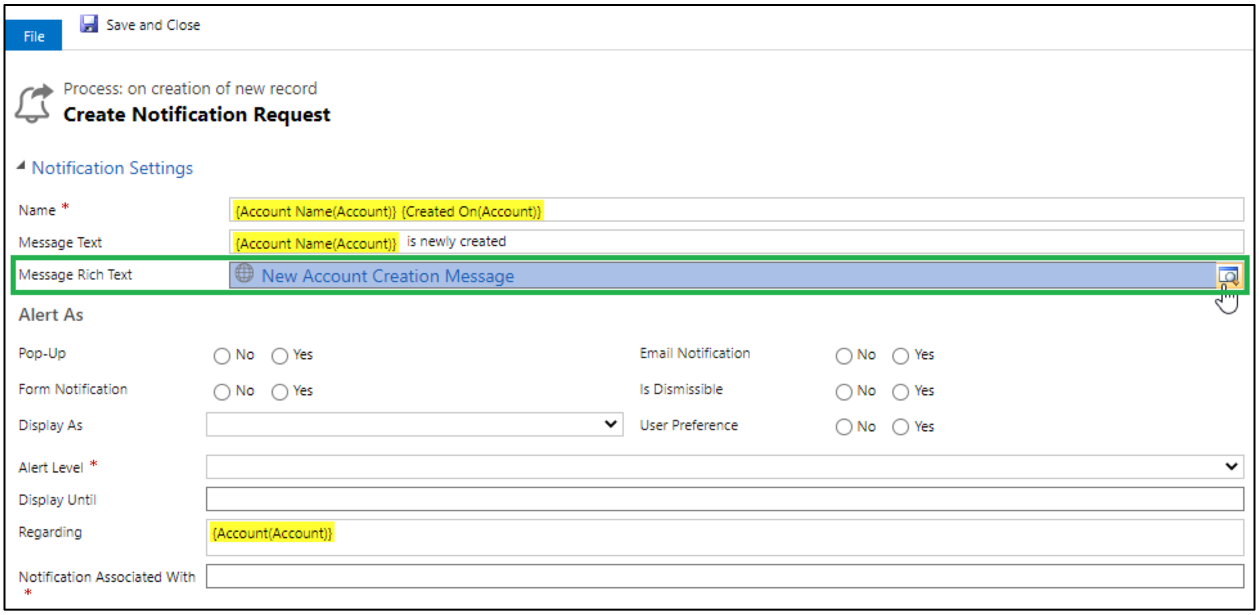
- Navigate to **Alerts4Dynamics App --> Message Texts -->** Click on the **'New'** Button**.**



- 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'.**



- 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.

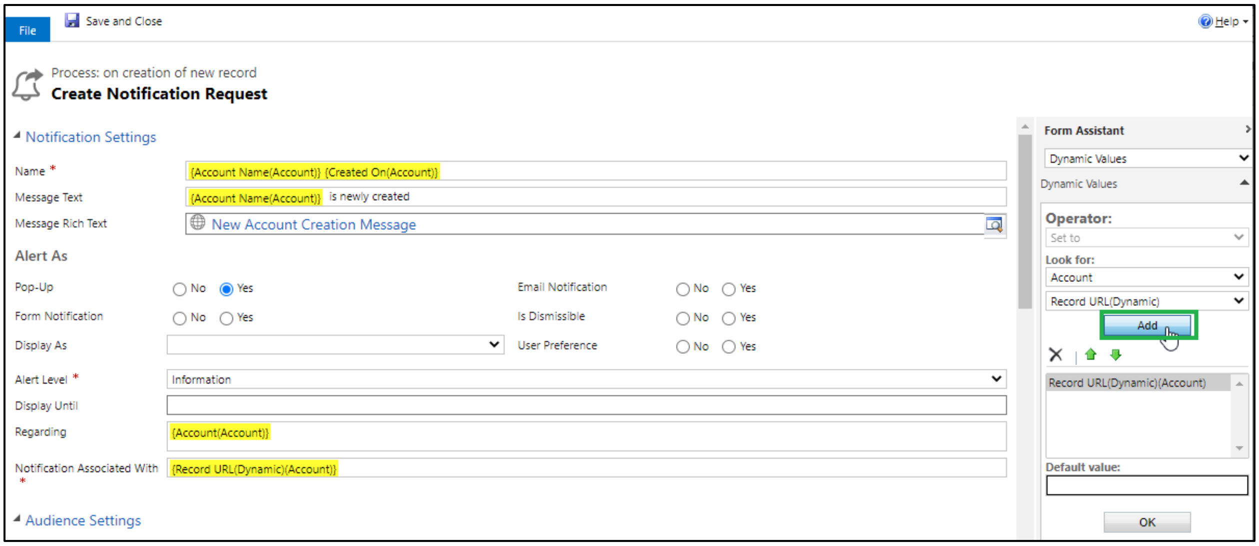


Note:

- ***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.***

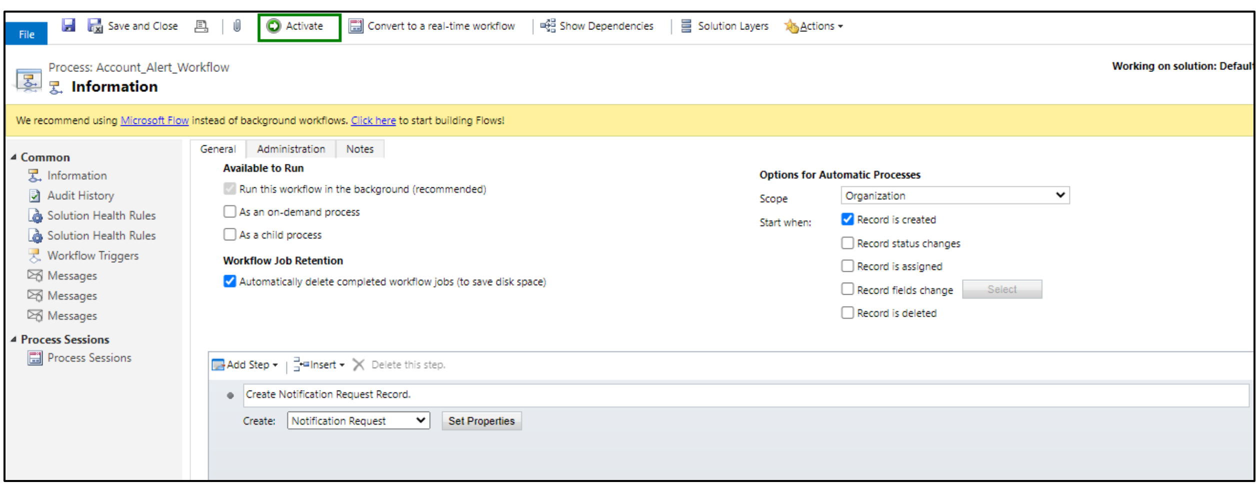
10) Fill in the following details:
    - **Alert as** - Select only Pop-Up as **'Yes'** and leave rest all blank
    - **Alert level** - Warning/Critical/Informational depending on user's requirement
    - **For Notification Associated With Field** - You will have to select a dynamic record URL of the 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'**.



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.

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



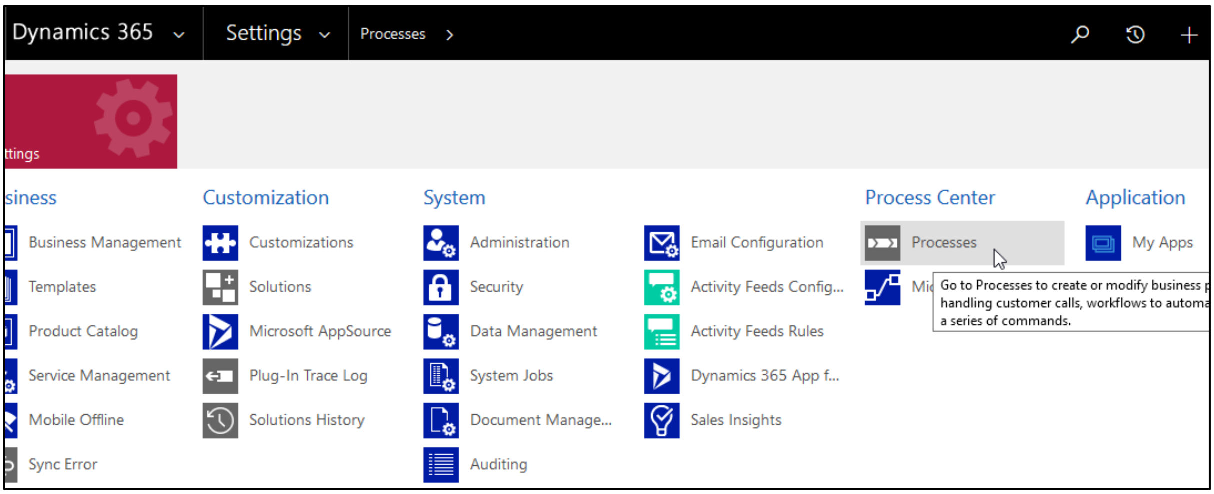
In this way, you can create an event based alert to be shown once a new record is created on the selected entity.

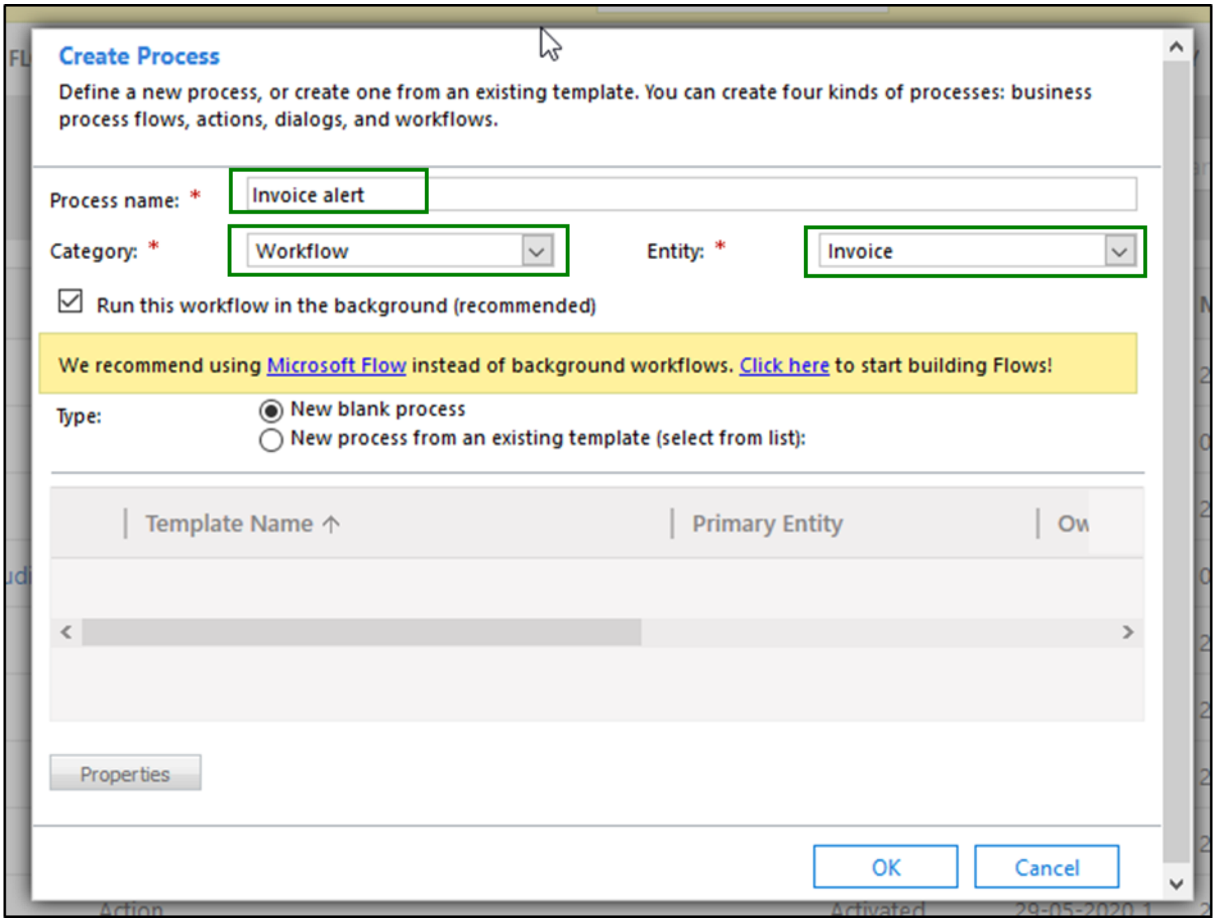
Example 2: Now, let us see how to configure the Event-based alert for the scenarios where the entity on which the notification to be shown is different from the entity where the workflow is triggered and also if you want the notification audience and email audience to be the related records which are 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:

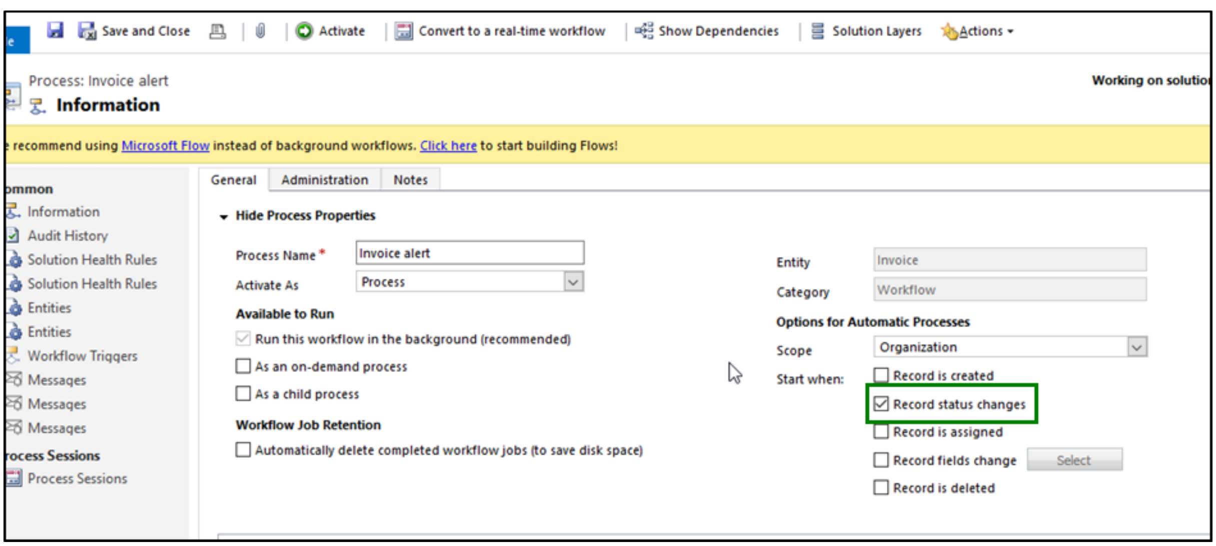
There is an invoice with a related account which has further multiple associated contacts and user wants to show the notification as well as send an email to these contacts once the invoice is paid. For this, we will configure the workflow as shown below:

1) **Navigate to Advanced Settings → Processes → New Process → Fill the fields → Click on OK**.

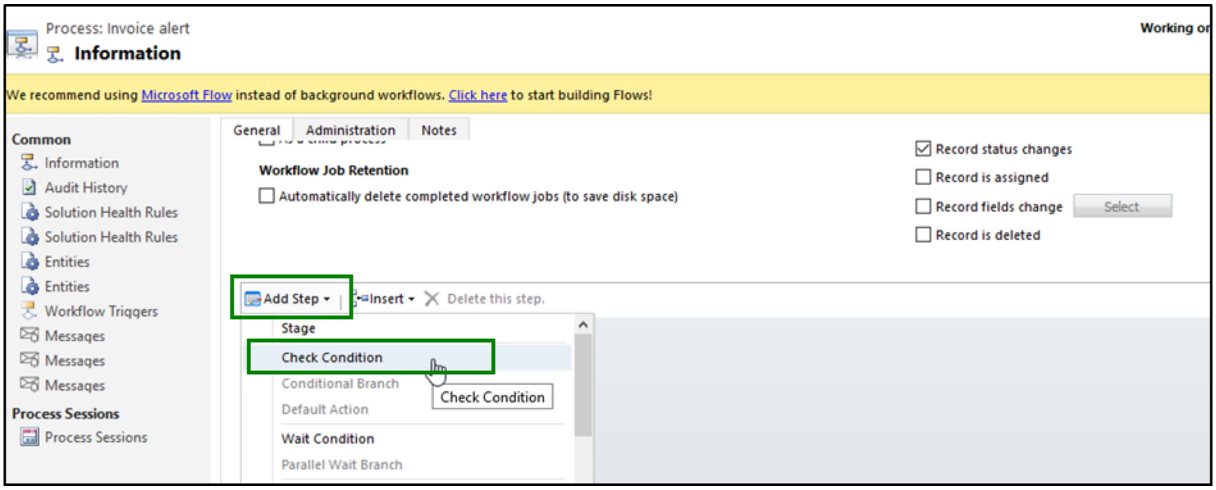




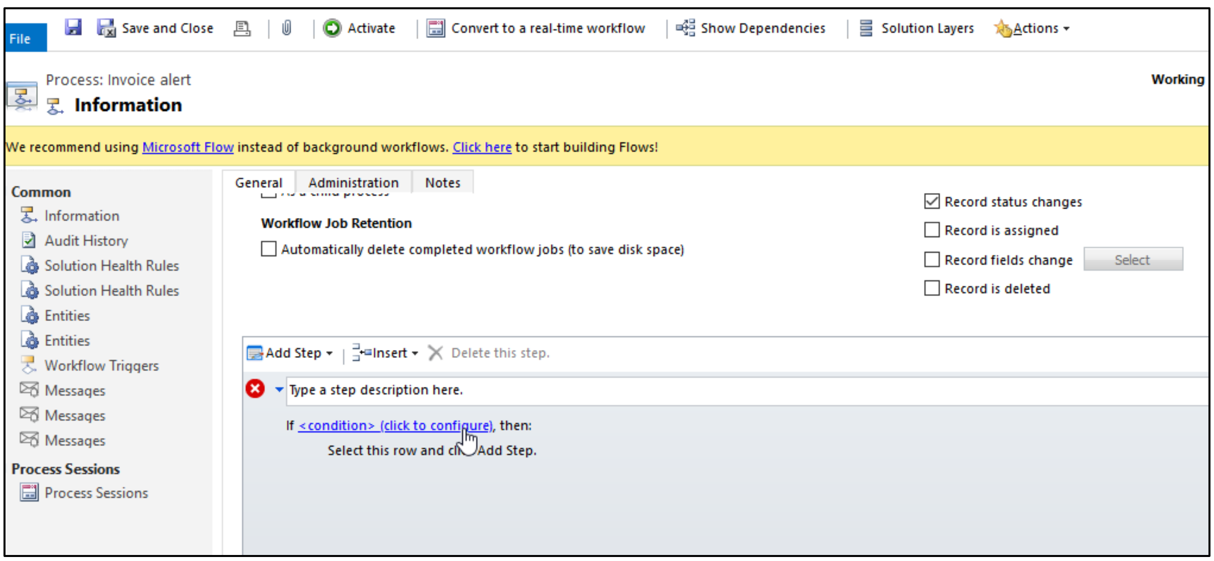
2) Since we want to trigger an alert on status change event of an invoice (i. e. when invoice is paid), we will enable the **'Record status changes'** checkbox.



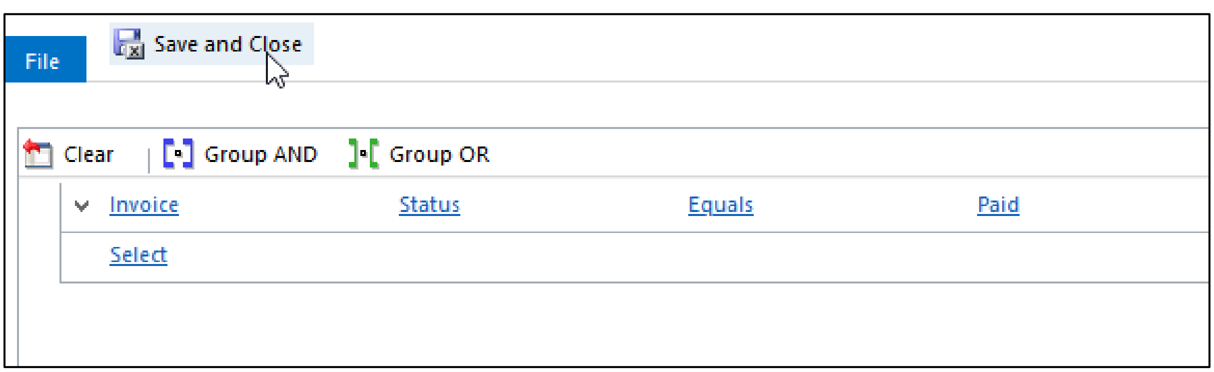
3) Now, add a step and check the condition if the invoice is paid.



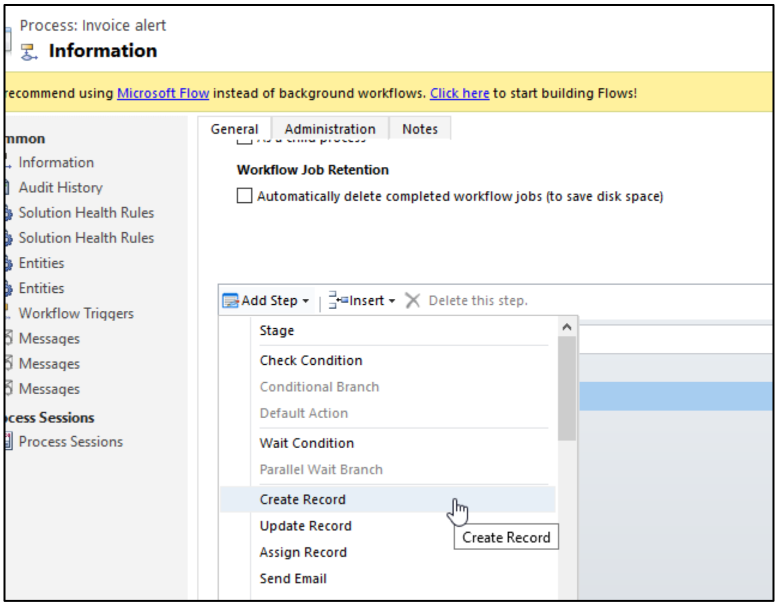
4) Here, we will check the condition whether the invoice status has been paid, you can similarly define any condition.



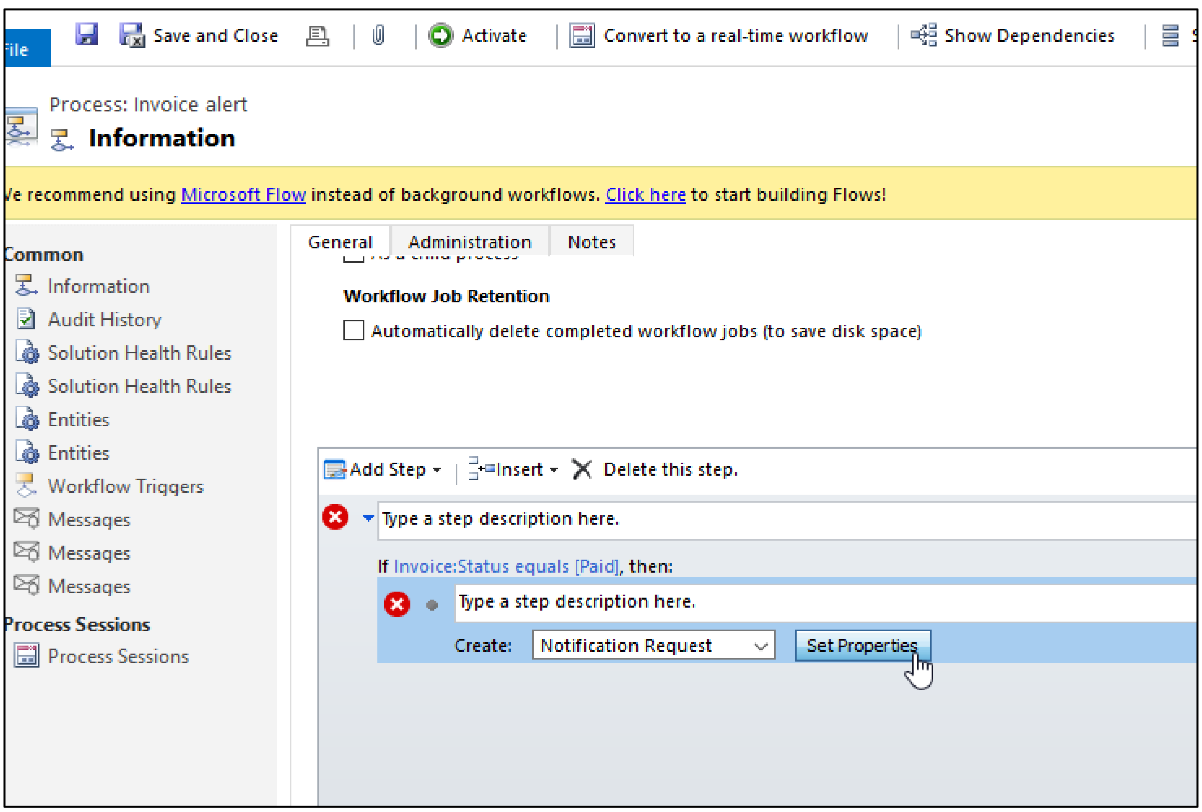
5) Now click on **'Save and Close'**.



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



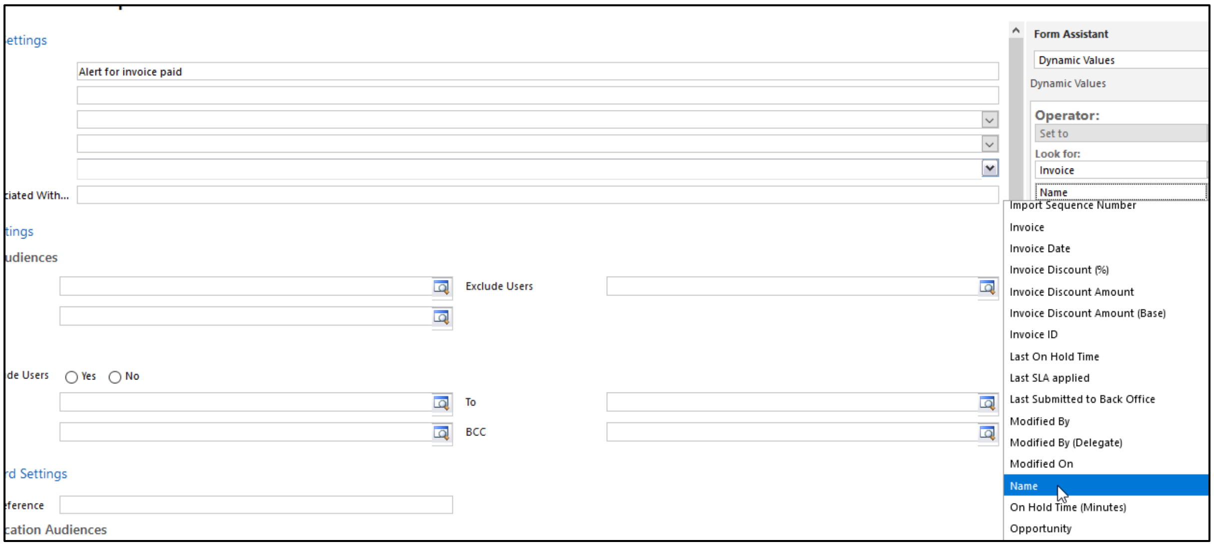
7) Select **'Notification Request'** for record creation and click on **'Set Properties'**.



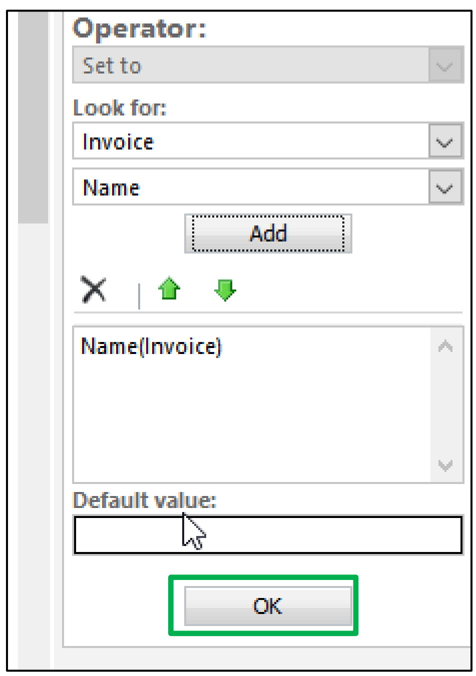
8) Fill the following fields:

- **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.



- Click on **'Add'** and **'OK'.**

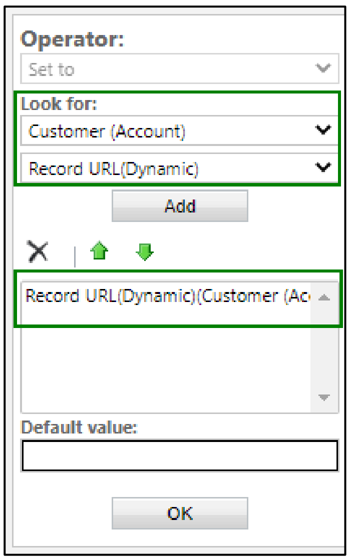


- **Message Rich Text –** Select the appropriate Message Text from the lookup. To know more about Message Rich Text, skip to Message Rich Text section.

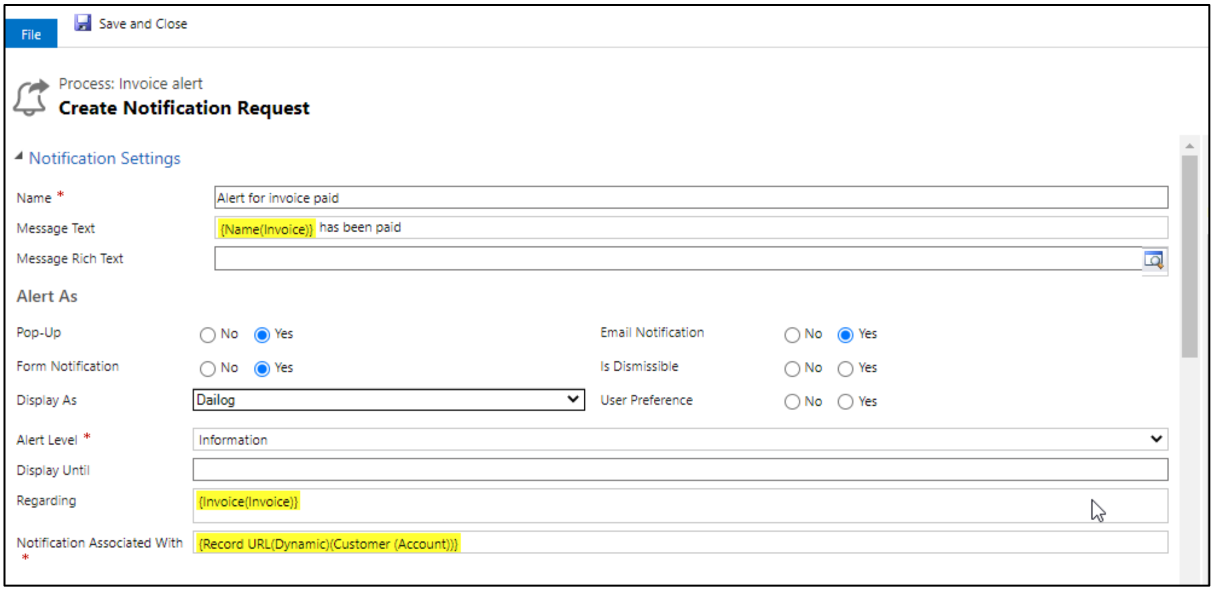
Note:

- ***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.***

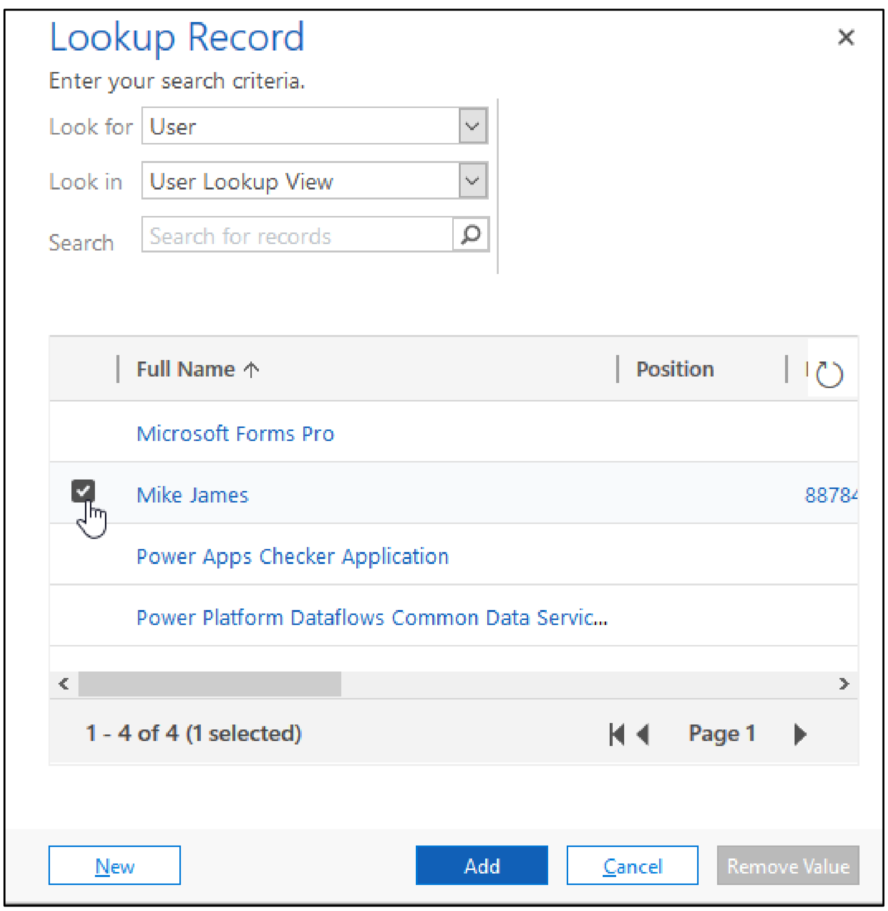
9) Next, fill the following fields:
   - **Alert As** – Since we want to send an alert through an email, we will select it as **'Email notification'.**
   - **Alert level** – Let's say it is just a normal informational alert, we will select it as **'Information'**.
10) Populate the field '**Notification 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**.



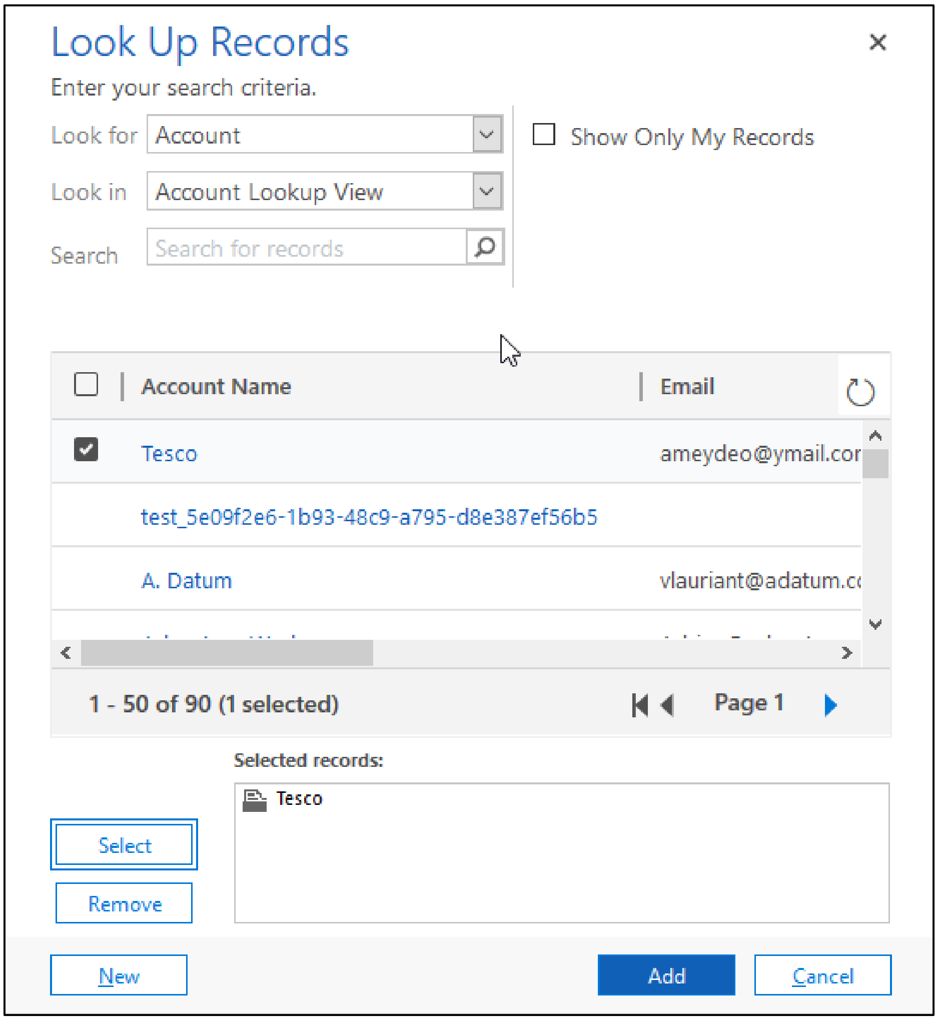
This will set the field with value as shown below:

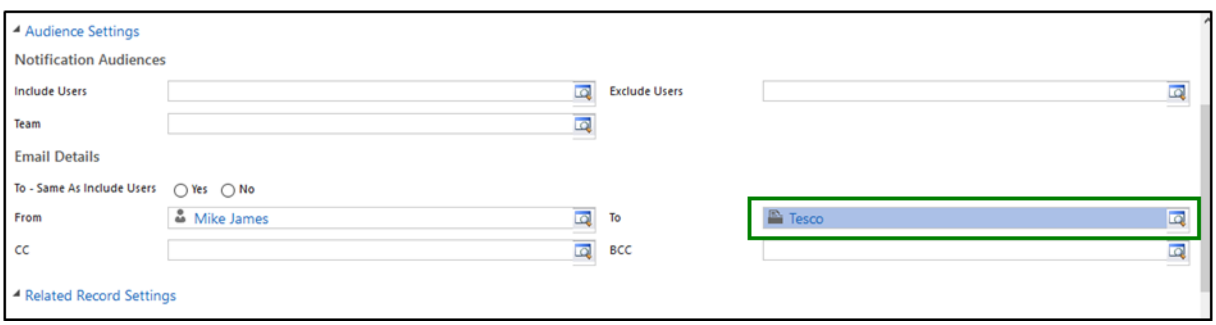


11) Now we will define the email recipient and select the user from whom you would like to send an email notification. Click on the below look-up field. In this scenario we will set the Notification Audience section blank. Hence, the notification will be displayed to all the users in the CRM.
12) Select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

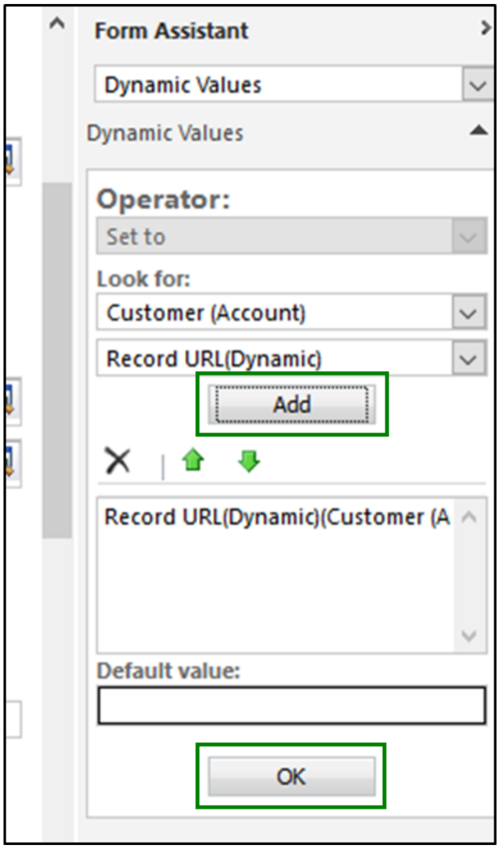


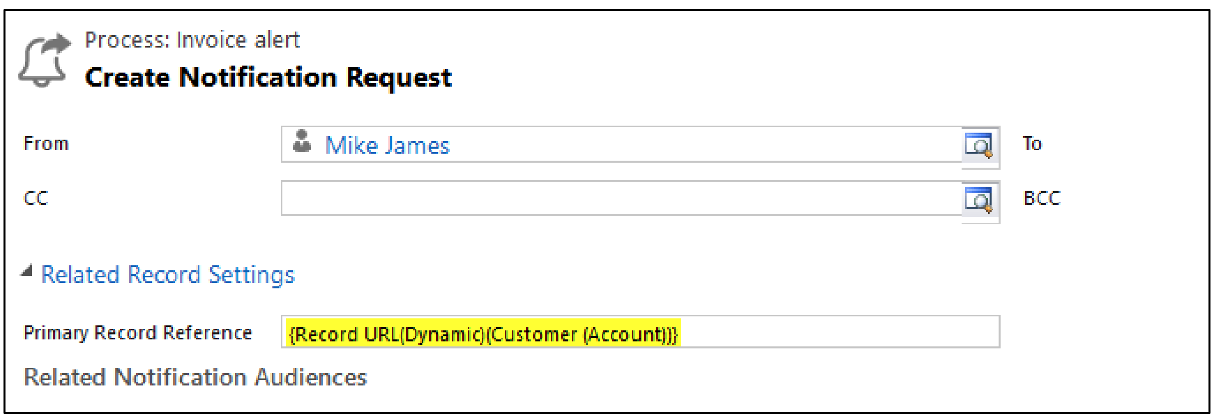
13) Select the **'to'** recipient and click on **'Add'**.



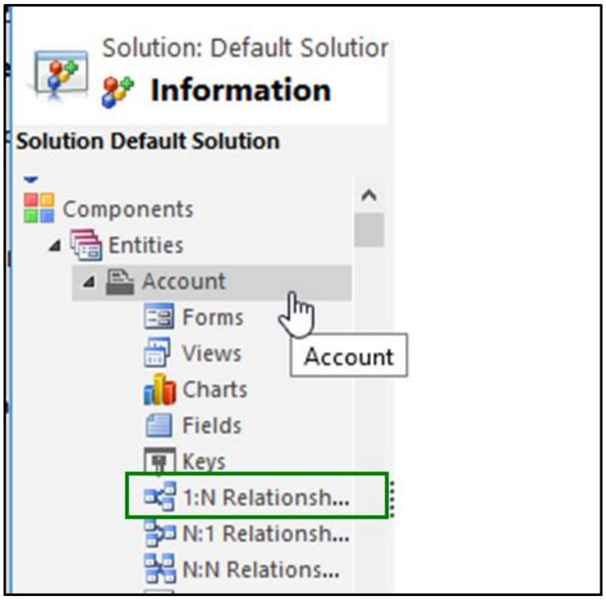


14) Here, we want to send the email notification to all the contacts that are associated with **'Account'**, so we will select the primary entity as **'Account'** and select **'Record URL (Dynamic)'** from the list. Similarly, we can select any related entity as shown in the below image.

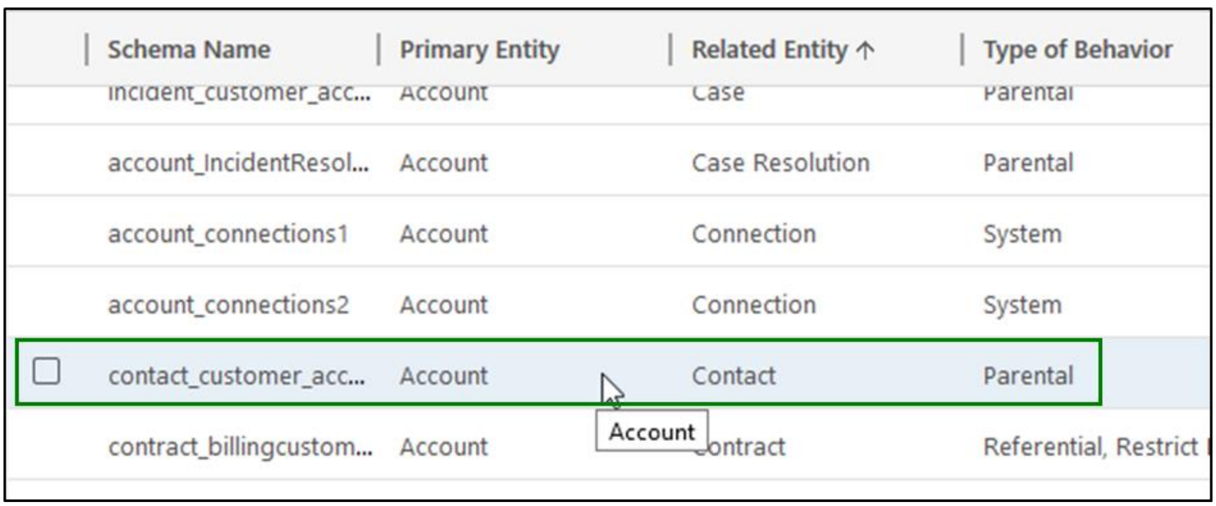




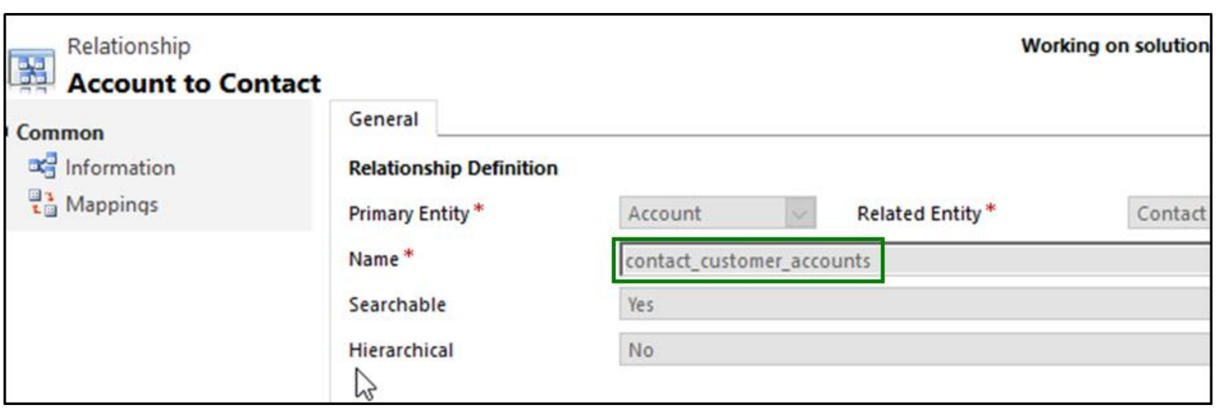
15) Next step is to define the related recipients for receiving the email notification. For this, you will have to enter a logical name of 1: N relationship that account holds with contact. **Navigate to Advanced Settings → Customizations →Customize the system.**
16) Look for Account entity → 1: N relationship.



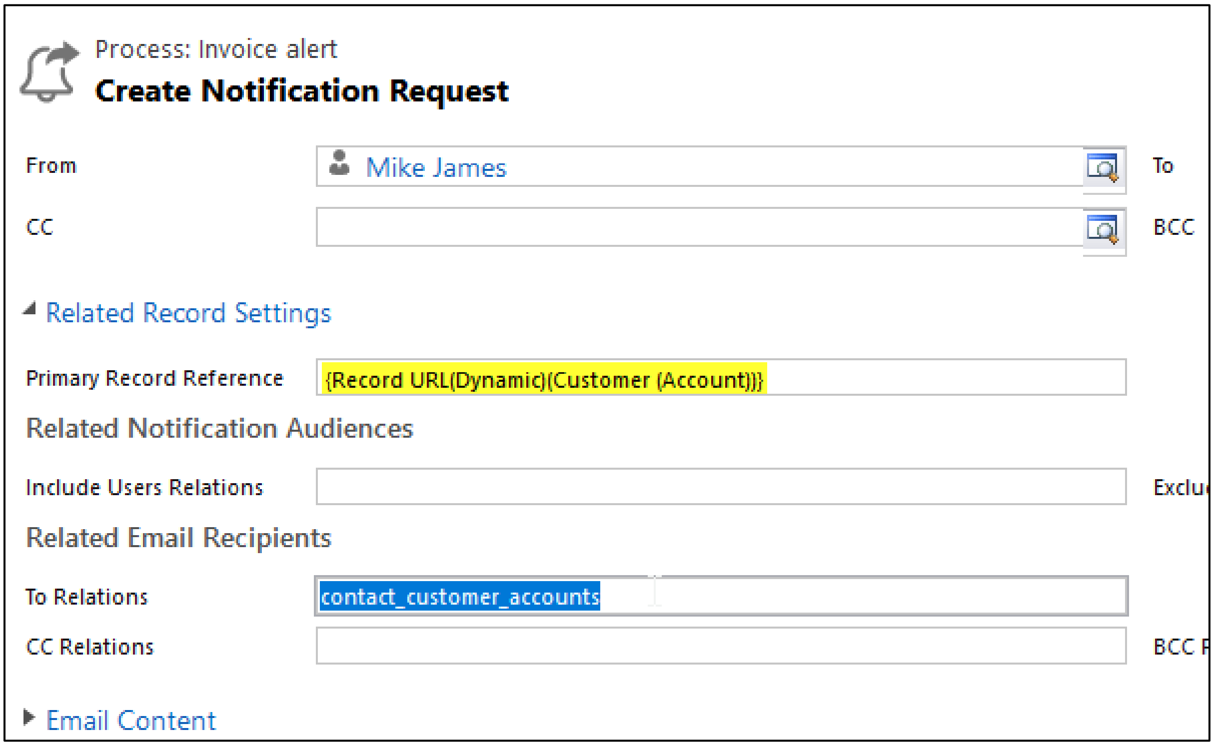
17) Look for the below relationship and open it.



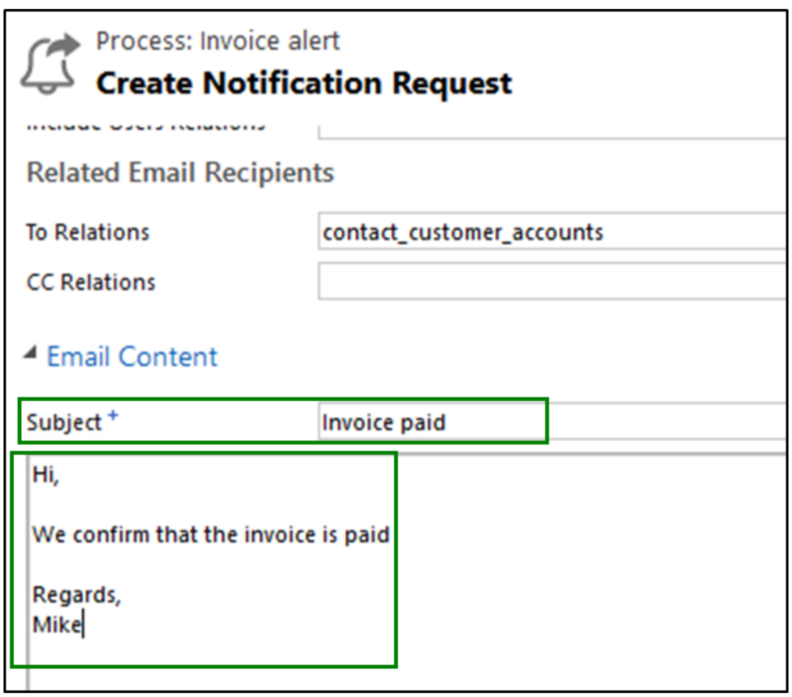
18) Copy the name of the relationship.



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.

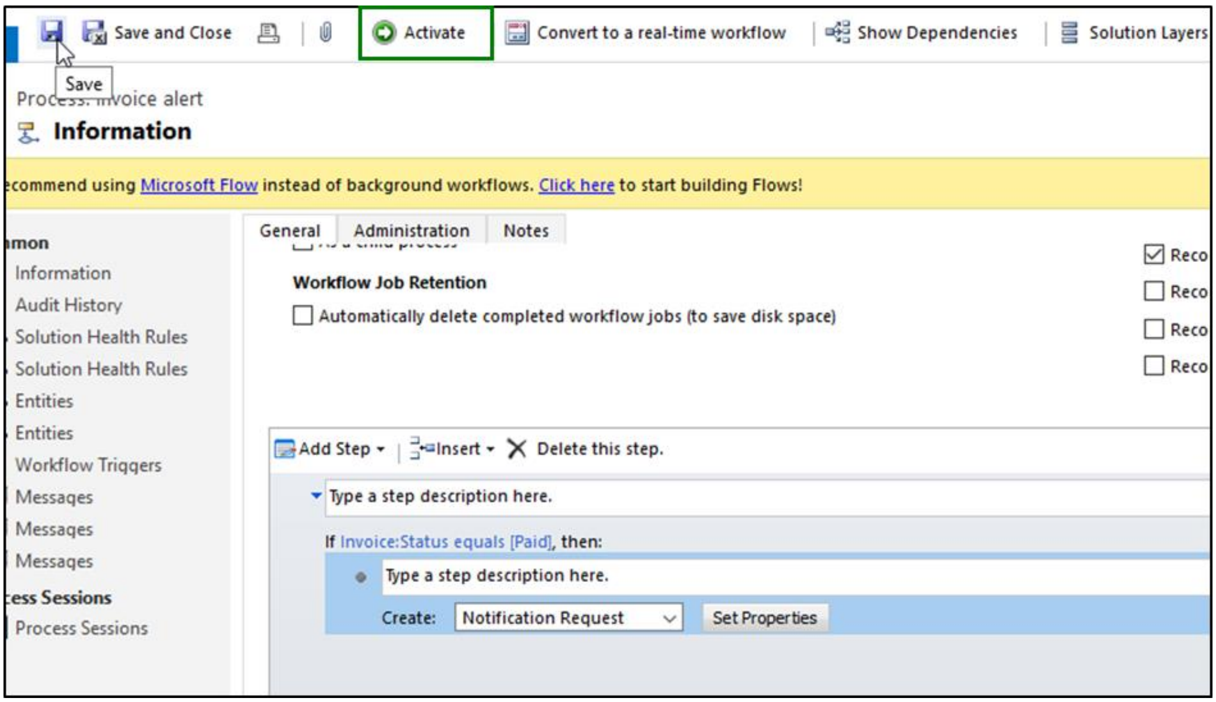


20) Enter a valid subject and relevant message for an email.



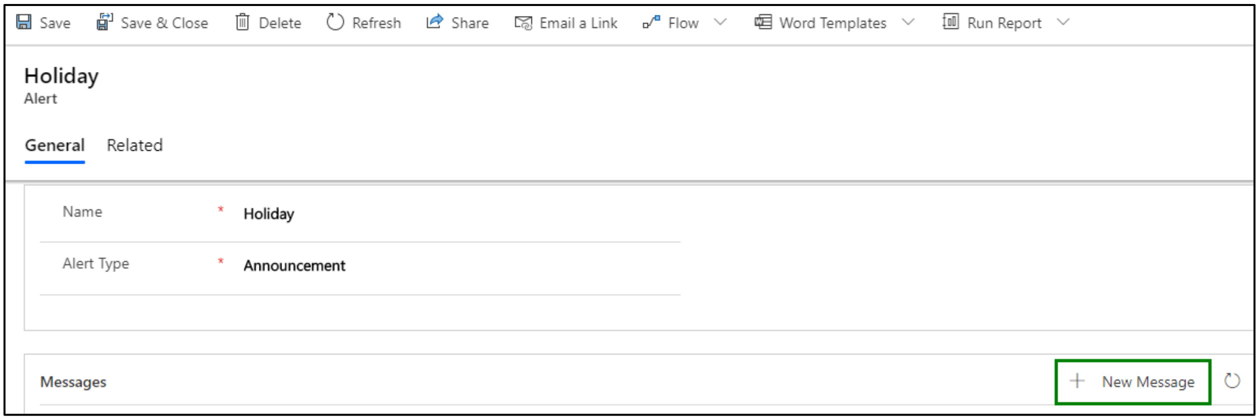
21) Once this is done, click on **'Save and Close'**.

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



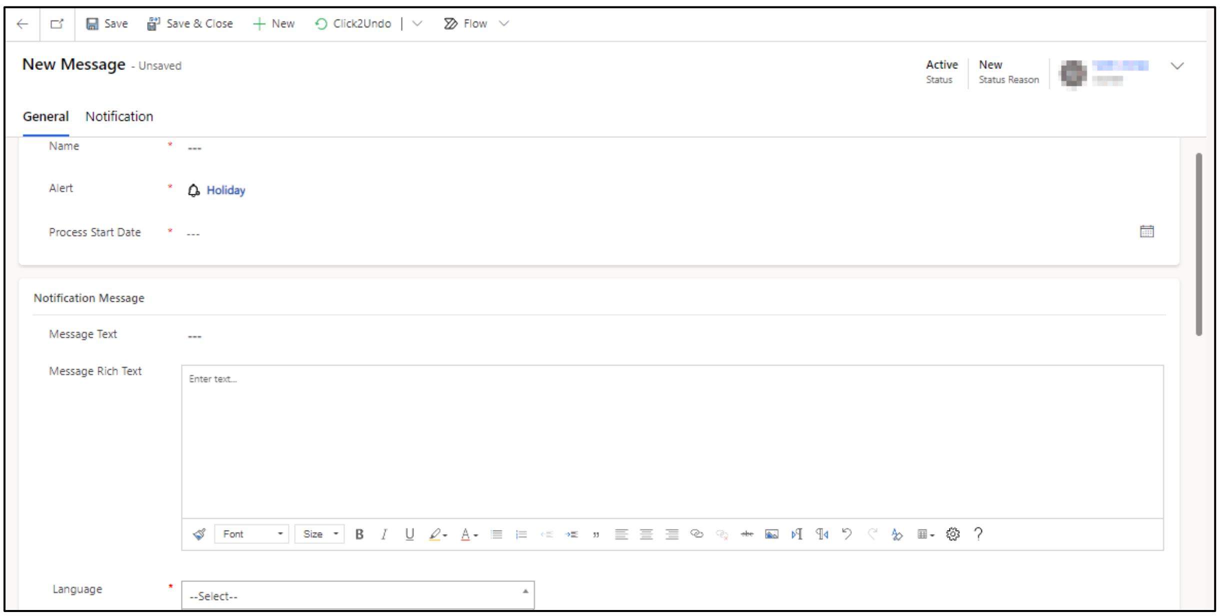
Message

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 30th June, Holiday on 20th July, etc.



Note: Message cannot exist independently without an Alert.

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



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 Message Rich Text 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.

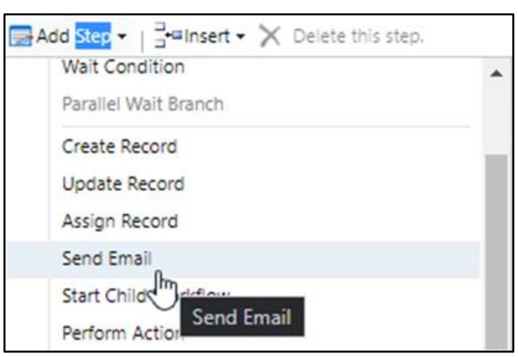
  c. **Email Notification:** The message will be sent to the users through email.

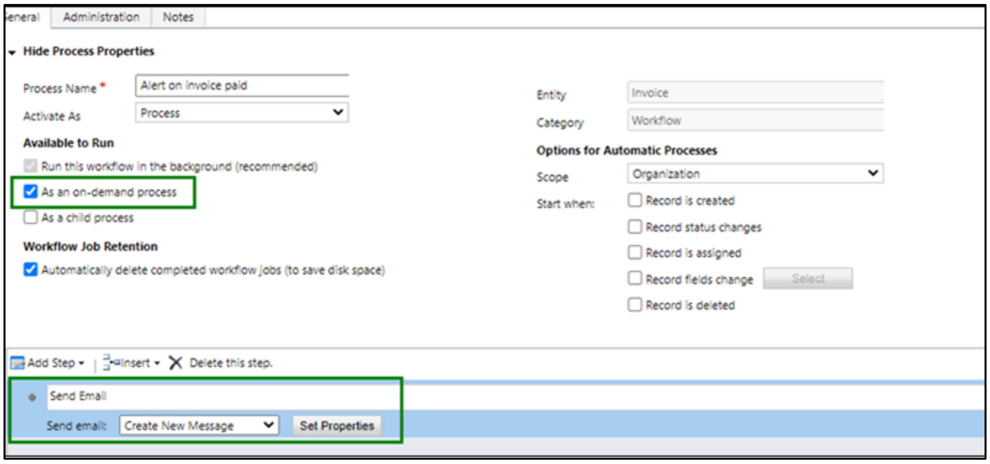
  d. **User Preference:** Gives a provision to set the preference to receive an alert

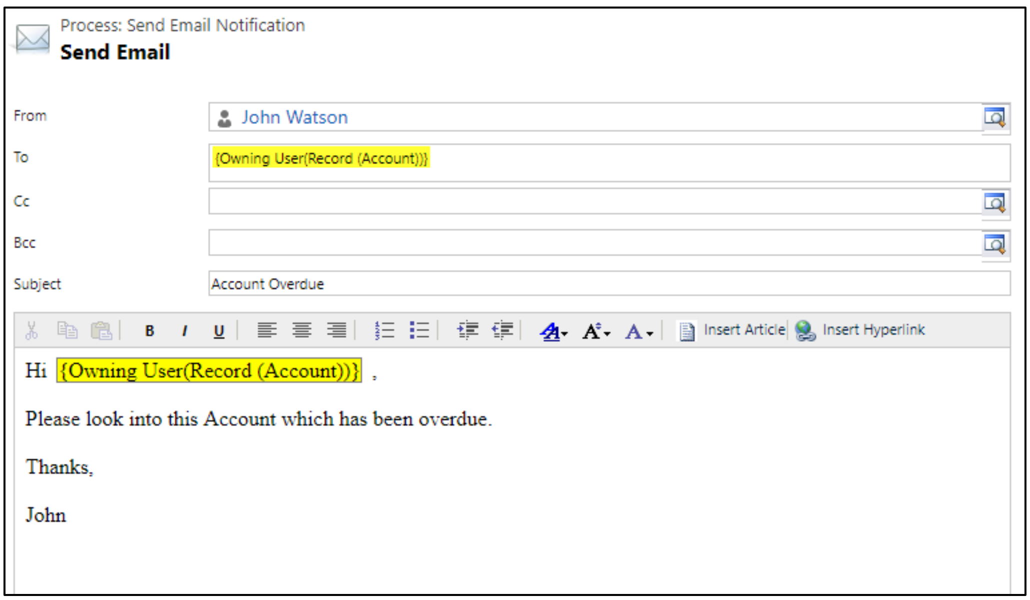
vii. **Is Dismissible:** Gives provision to configure the alert as either dismissible or non dismissible. If **'Yes'** is selected, alert becomes dismissible and if **'No'** is selected then alerts cannot be dismissed. ***(Note: Is applicable to all type of alerts).***

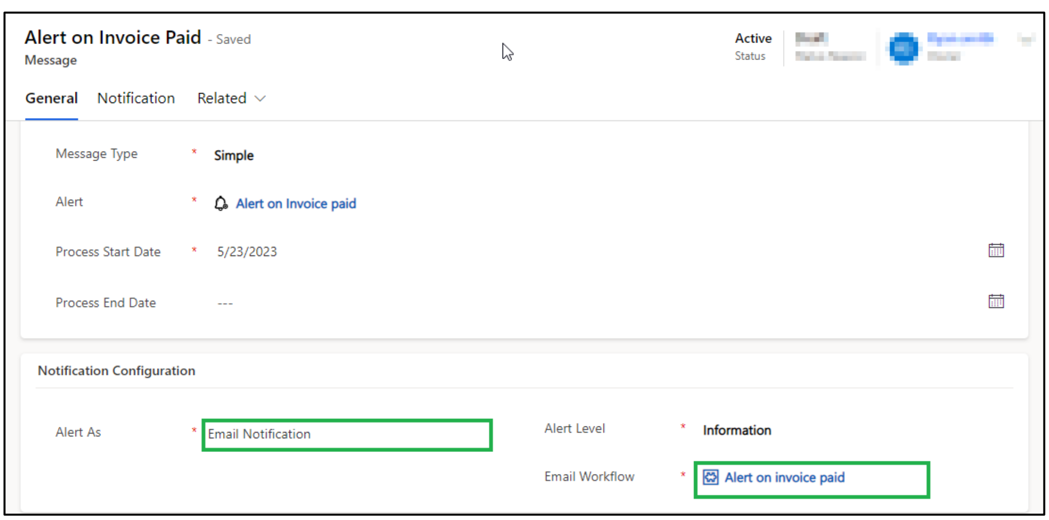
viii. **Auto Dismissible:** Gives provision to configure the alerts as auto-dismissible/non auto-dismissible. If **'Yes'** is selected then alerts will be automatically dismissed once the defined condition is no more satisfied. If **'No'** is selected then alerts cannot be dismissed automatically even 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.




eneral
Administration
Notes
Hide Process Properties
Process Name *
Alert on invoice paid
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
Invoice
Category
Workflow
Options for Automatic Processes
Scope
Organization
Start when:
Record is created
Record status changes
Record is assigned
Record fields change
Select
Record is deleted
Add Step
Insert
Delete this step.
Send Email
Send email:
Create New Message
Set Properties


Process: Send Email Notification
Send Email
From
John Watson
To
{Owning User(Record (Account))}
Cc
Bcc
Subject
Account Overdue
Insert Article
Insert Hyperlink
Hi {Owning User(Record (Account))} ,
Please look into this Account which has been overdue.
Thanks,
John


Alert on Invoice Paid - Saved
Message
Active
Status
General
Notification
Related
Message Type *
Simple
Alert *
Alert on Invoice paid
Process Start Date *
5/23/2023
Process End Date

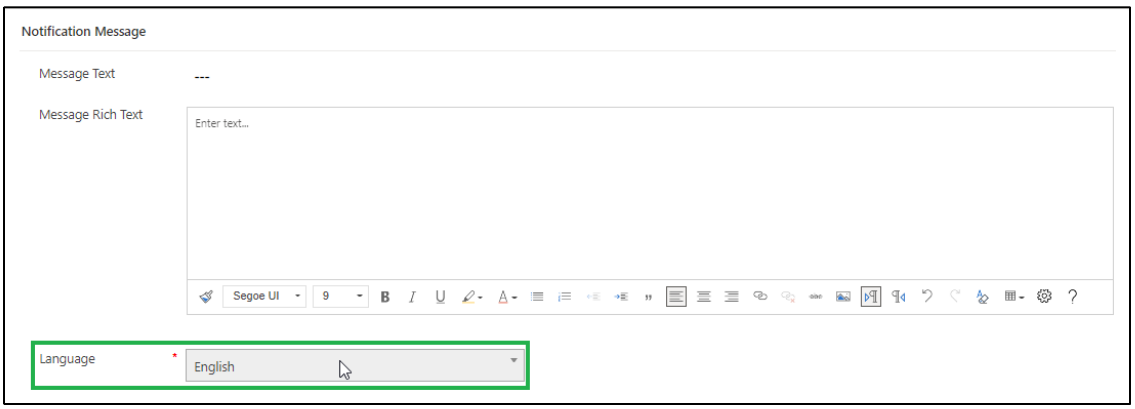
Notification Configuration
Alert As *
Email Notification
Alert Level *
Information
Email Workflow *
Alert on invoice paid

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.



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*.*

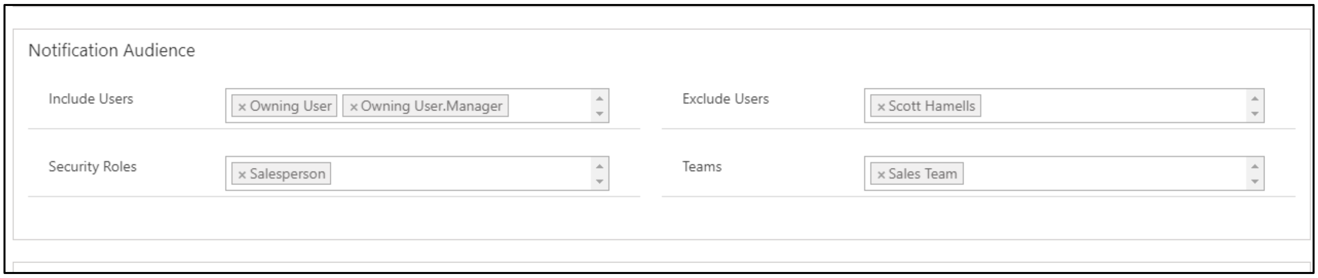
xvii. **Teams*:*** If you select Teams here, alerts will be shown to these teams.

Note:

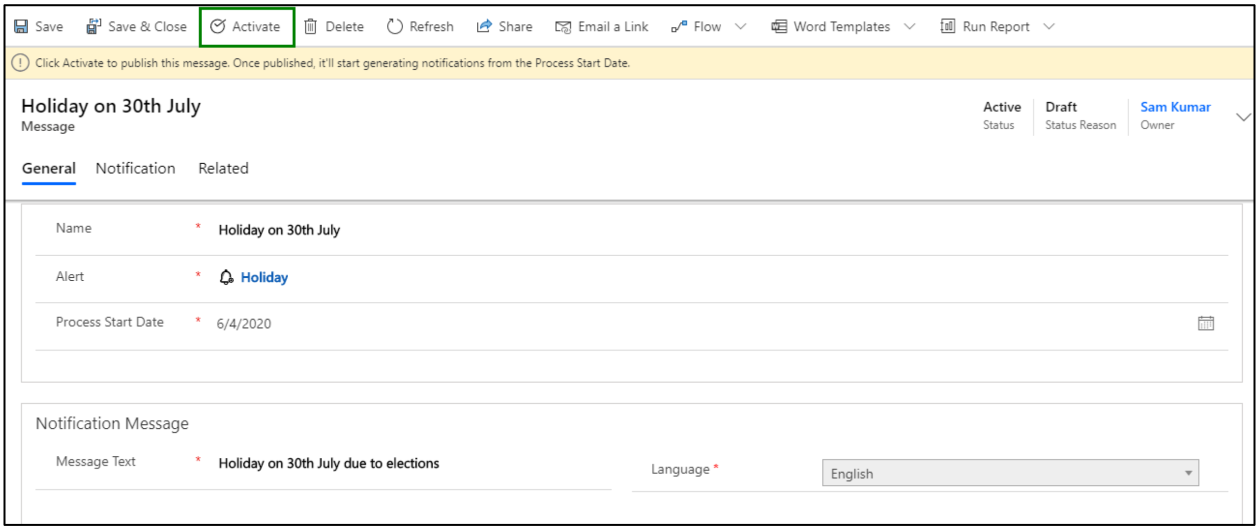
- ***If Include Users/Exclude Users/Security Roles are left blank, then the notifications will be shown to everyone.***
- ***Include Users/Exclude Users have priority over Security Roles.***

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.

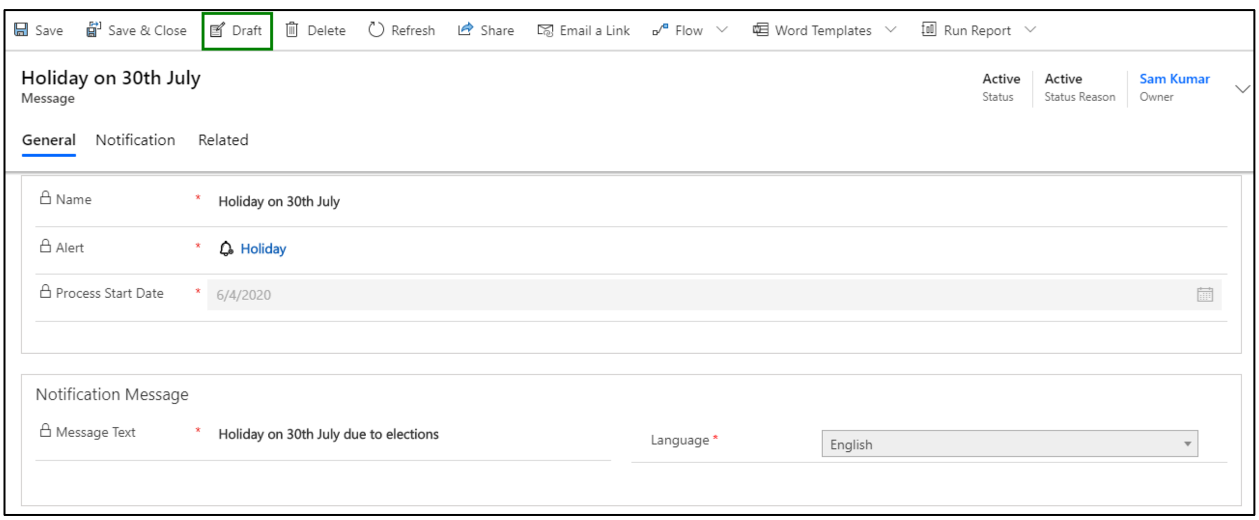
For example, in below image we can see in **Include Users** field **Owning User** and **Owning User Manager** are selected which are dynamic values and in **Exclude Users** field **'Scott Hamells'** (CRM User) is selected.



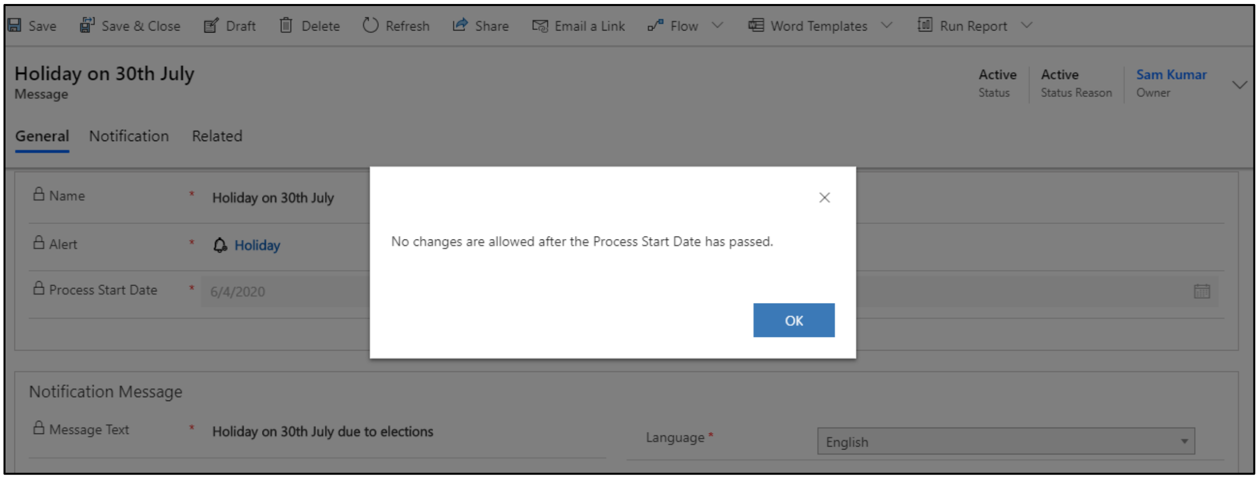
2. After creating a message, save it and click on **Activate** to make it live.



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



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.



Notification Message (Languages)

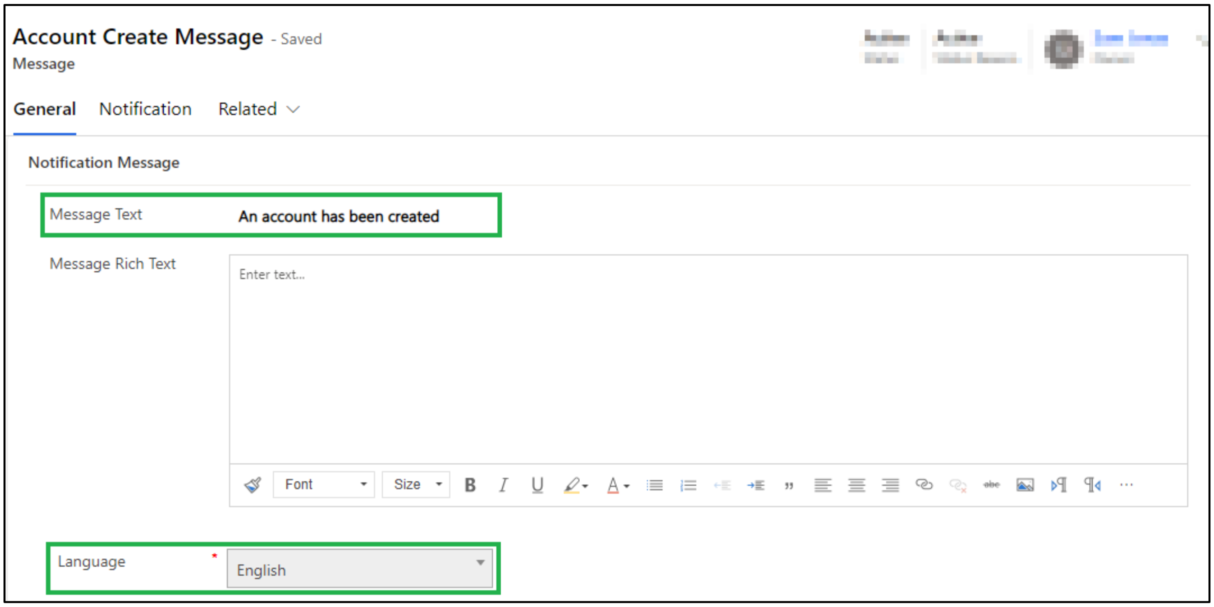
If the created Notification Message (language) is in English then the notification will be displayed only for users whose User Interface language is English.

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.
2. 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.

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

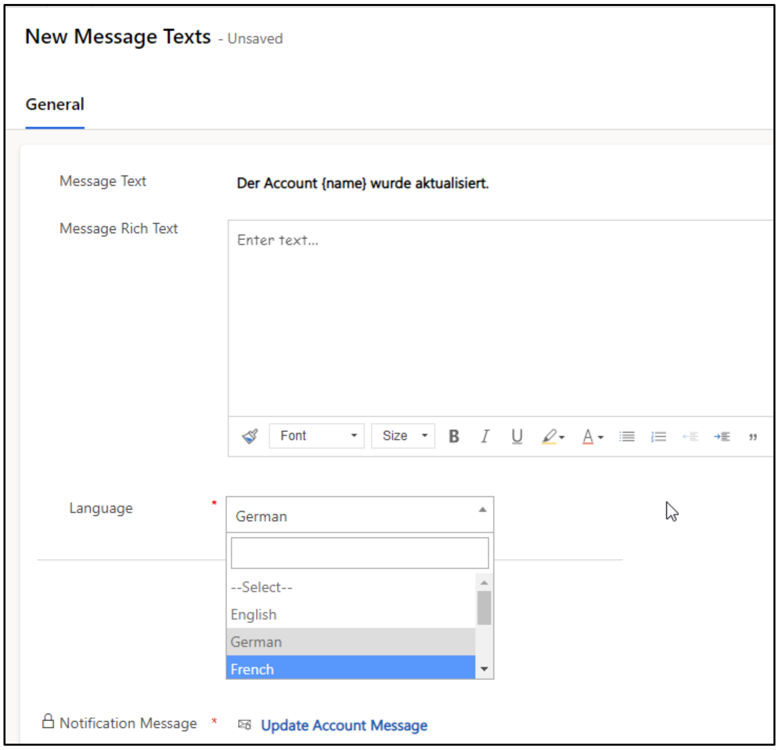
1. Change the **'Message Text'** field in the Message record will update the respective Notification Message record as it is in the **'Language'** field of that Message record.



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.

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.



Message Type

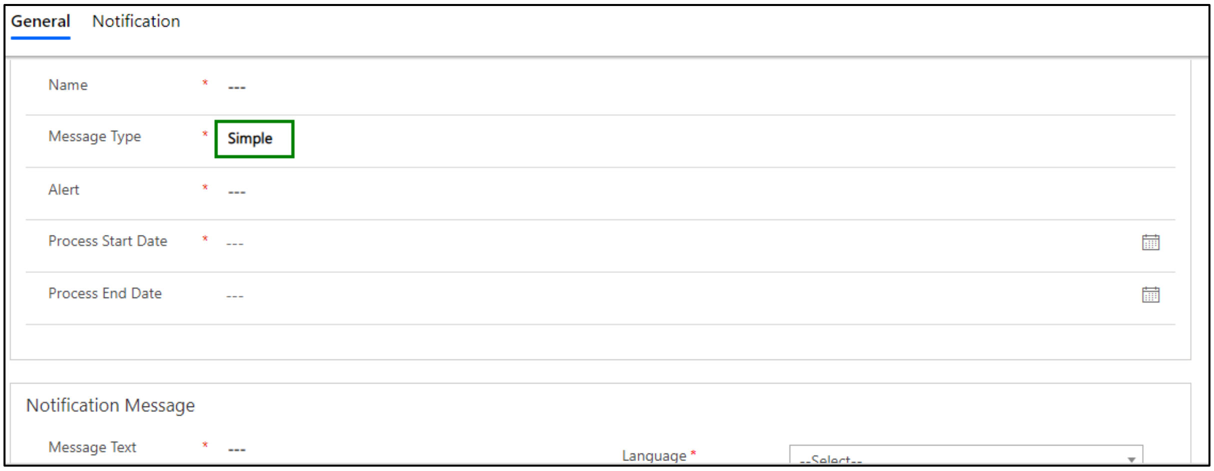
There are two **Message Types** in Alerts4Dynamics:

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.

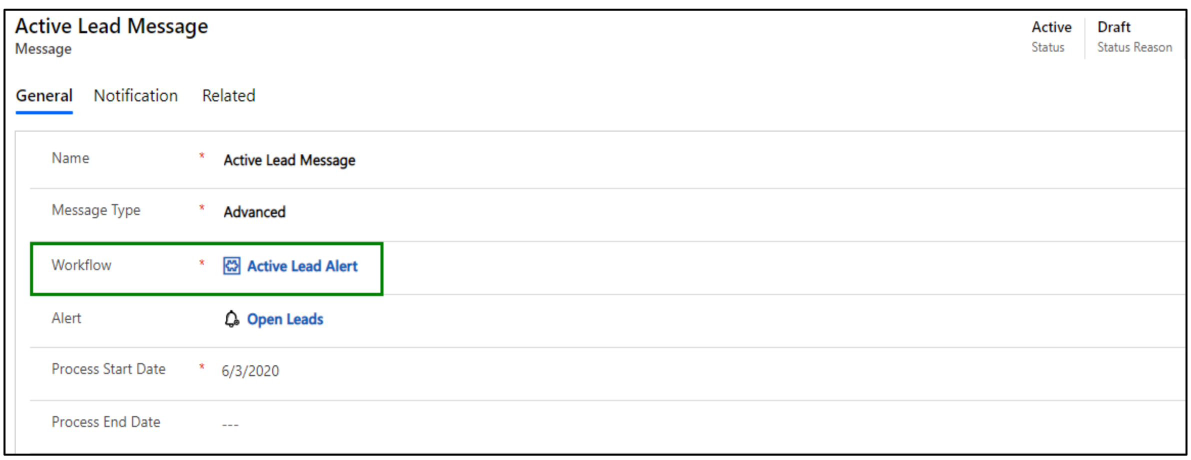
For Notification and Email Audiences we can select user type lookup fields which are available on the entity form will be shown in the Include Users, Exclude Users dropdown and for teams, similarly to user we can select team lookups fields.

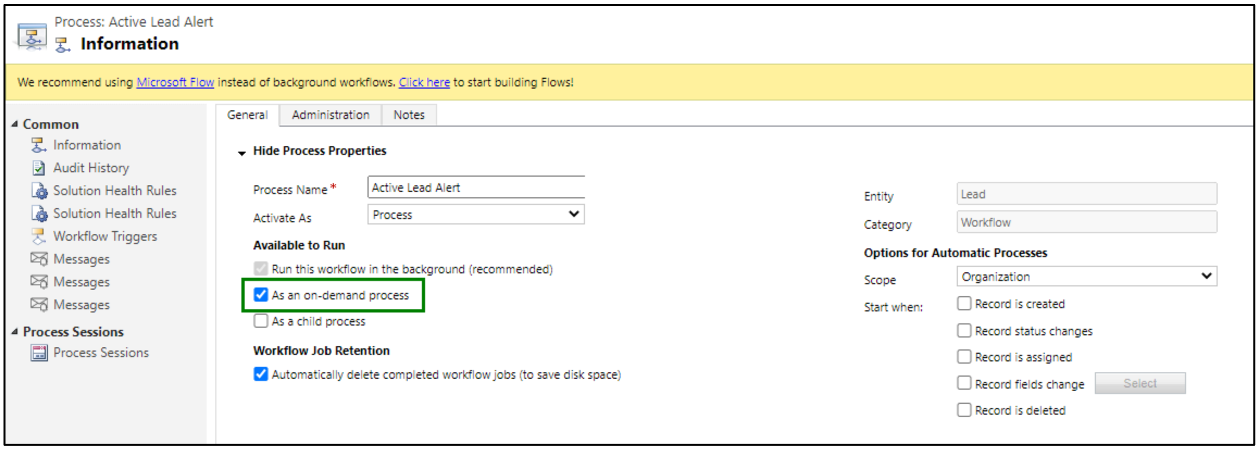


Advanced:

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.

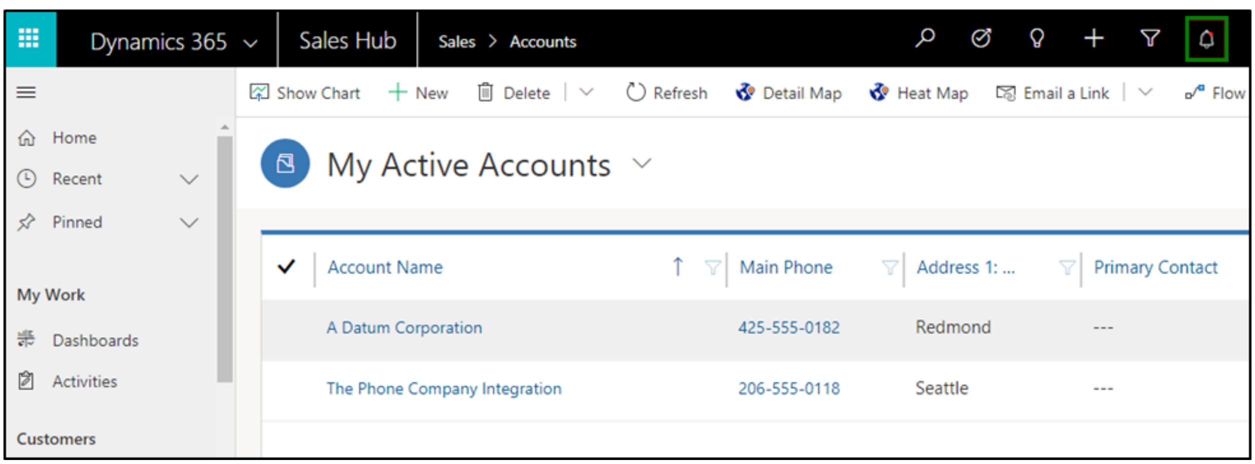




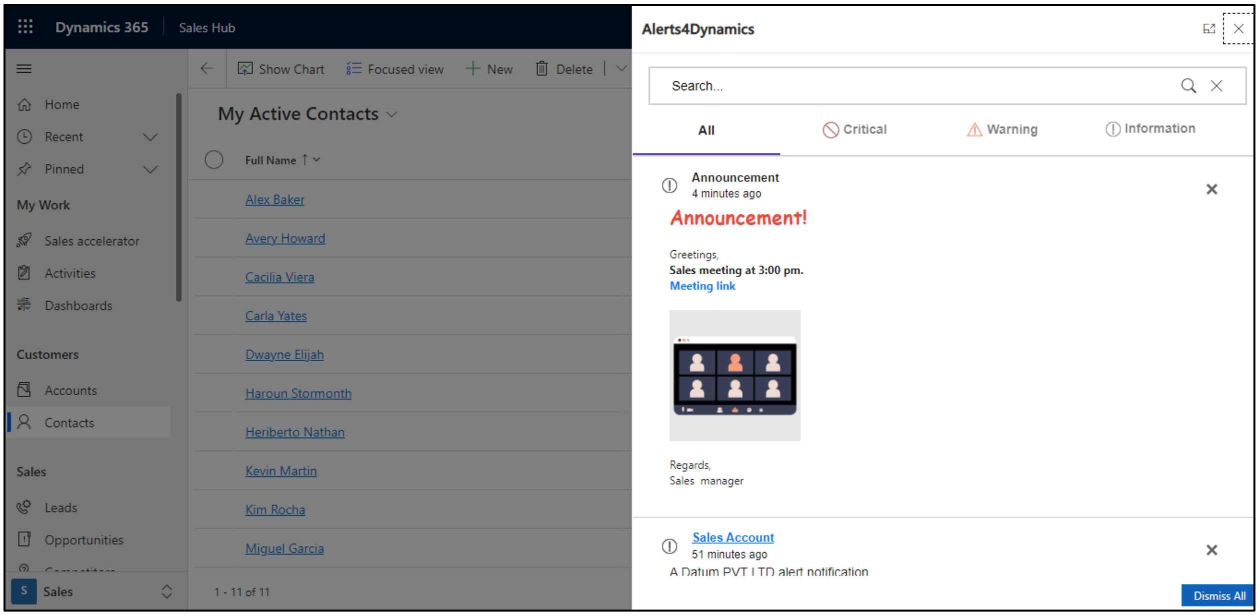
Notifications

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.

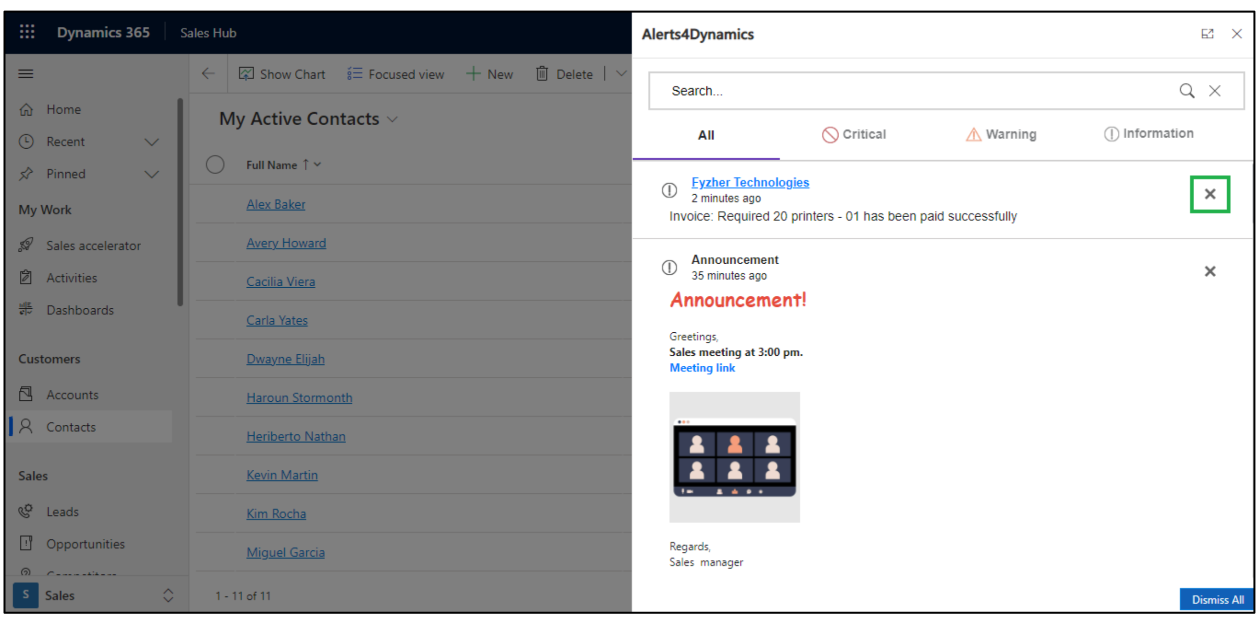


Notifications can be seen by clicking on Notification button.

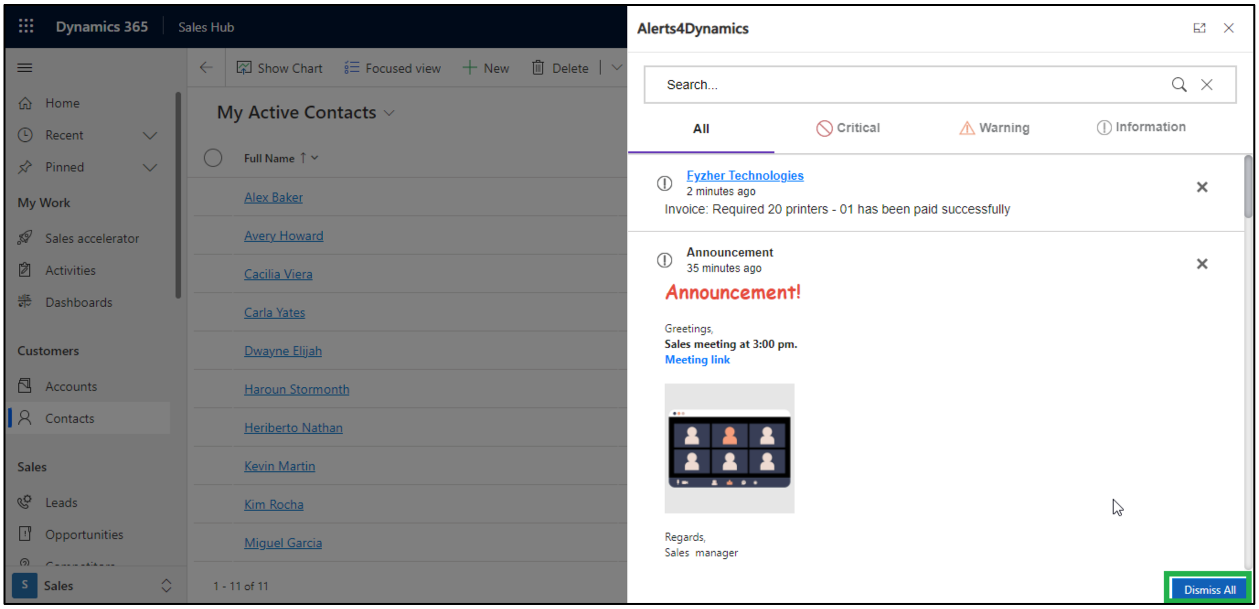


<u>Dismiss Notifications:</u> Notifications can be dismissed at any time. Notifications can be dismissed in two ways:

1. **Dismiss alerts individually:** Every alert can be dismissed individually by clicking on cross icon next to it.

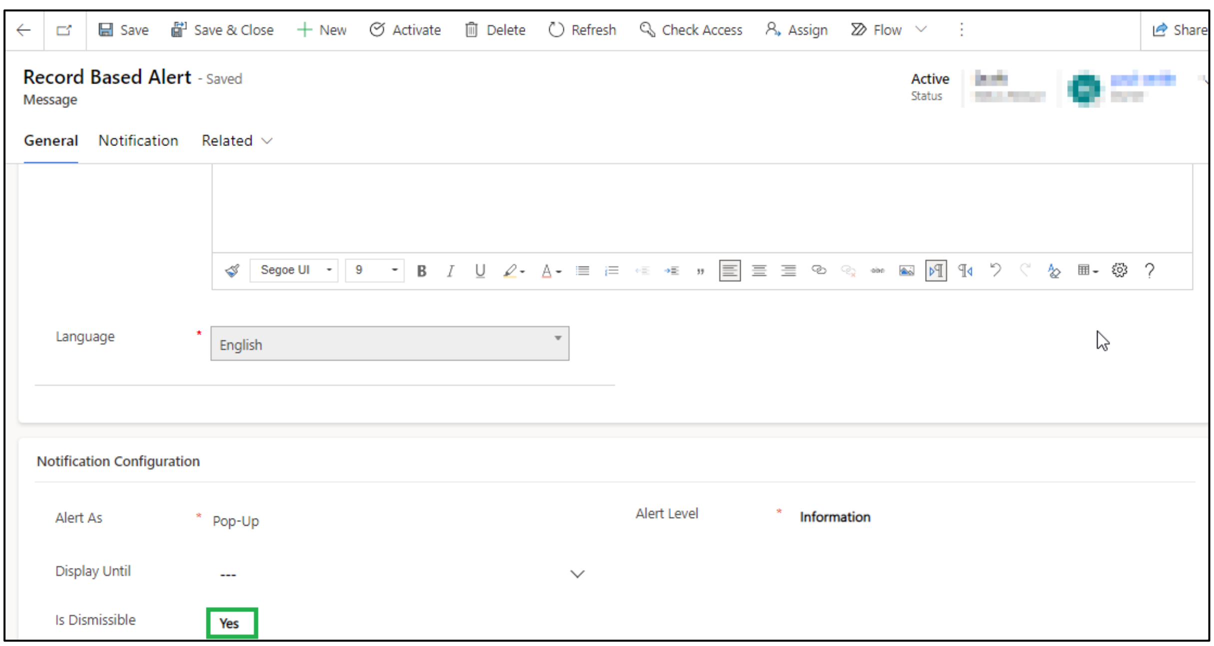


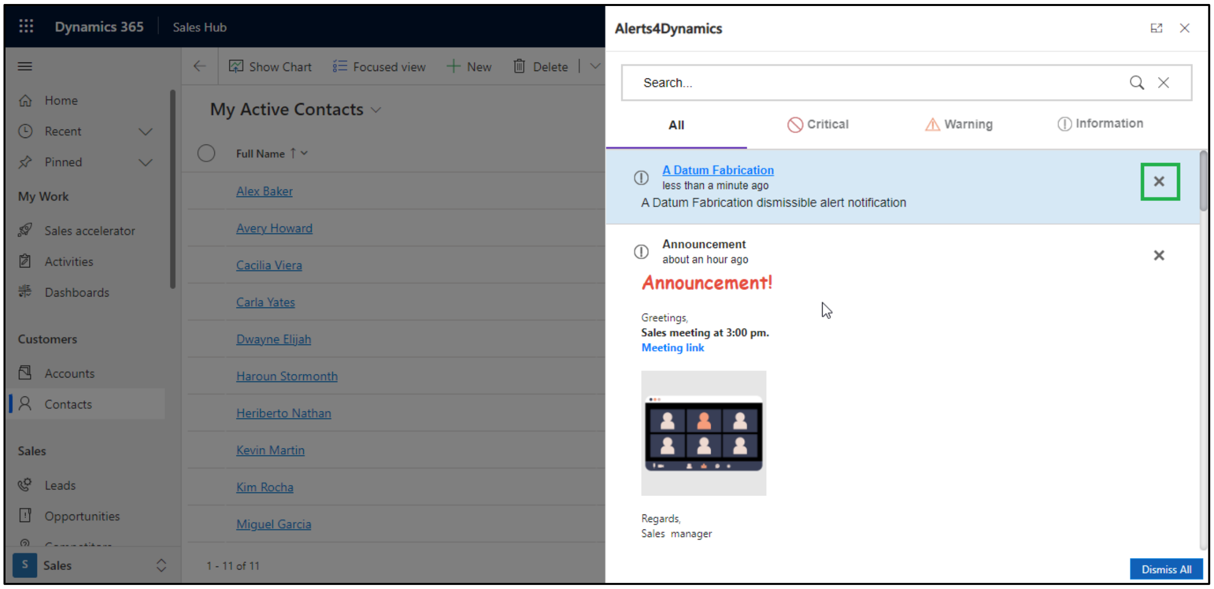
2. **Dismiss all alerts at once:** All the alerts can be dismissed at once by clicking on **Dismiss All** button.



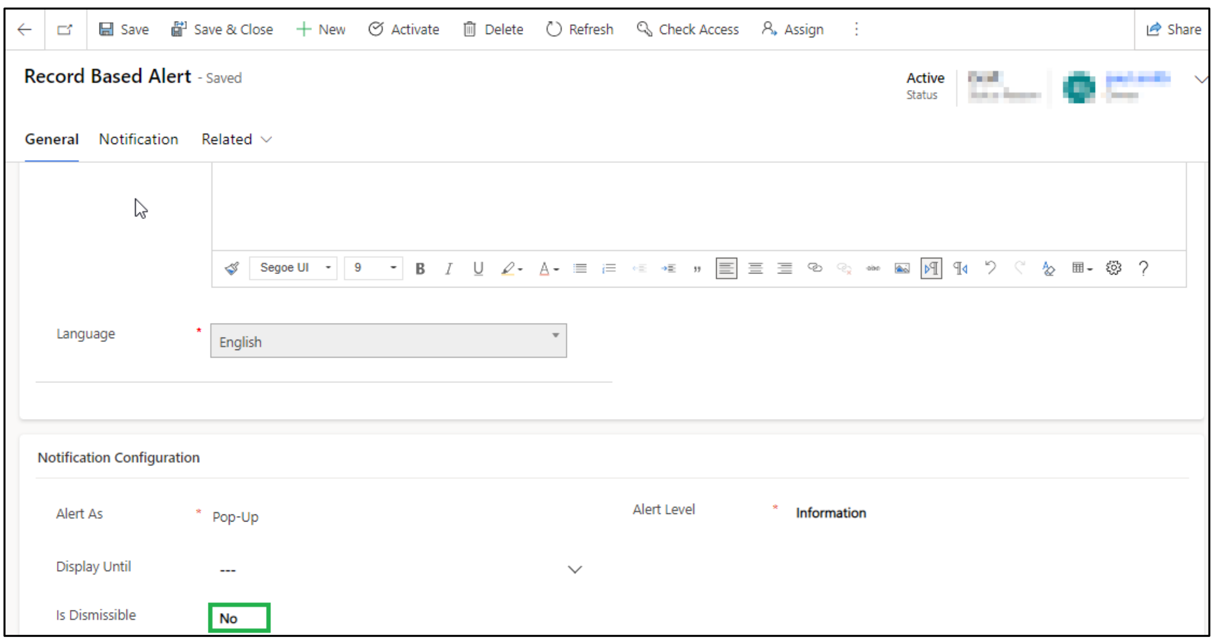
Dismissible Alert Notifications:

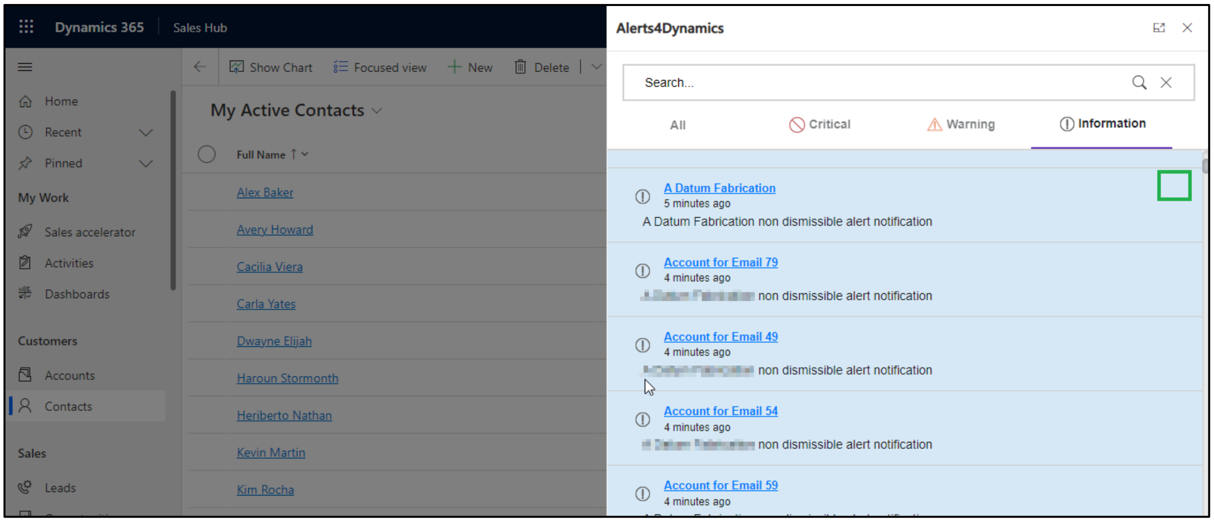
If user sets **'Is Dismissible'** field as **'Yes'** then the alert can be dismissed. In this case, **'X'** button will continue showing up on the alert notification indicating that the alert notification is dismissible.





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.





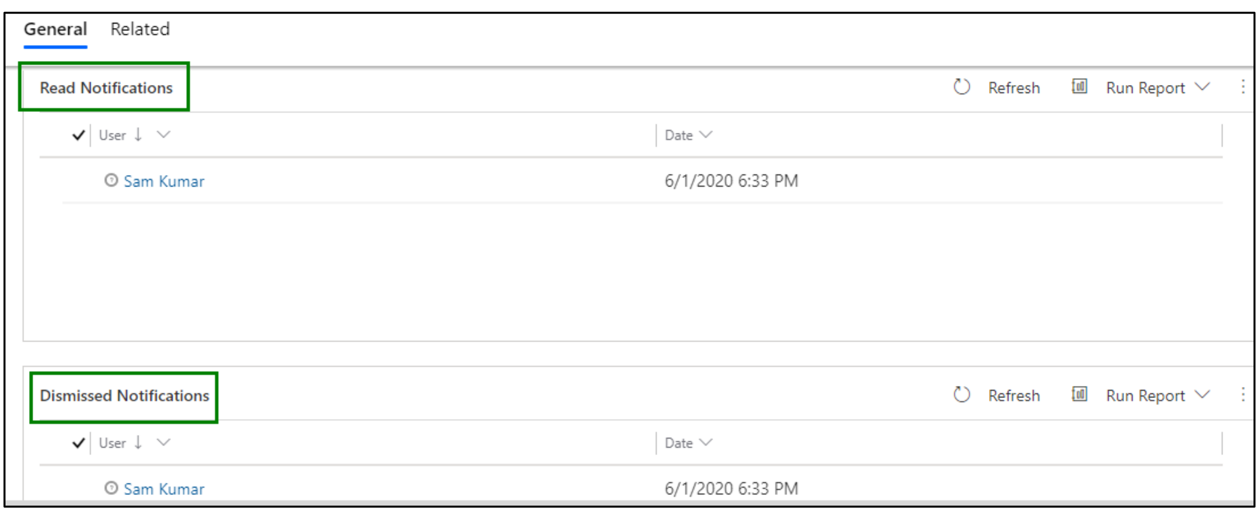
Note:

- ***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 → Alerts → Select Alert → Select Message → Notification Tab → Select Notification** and you can view the status.

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

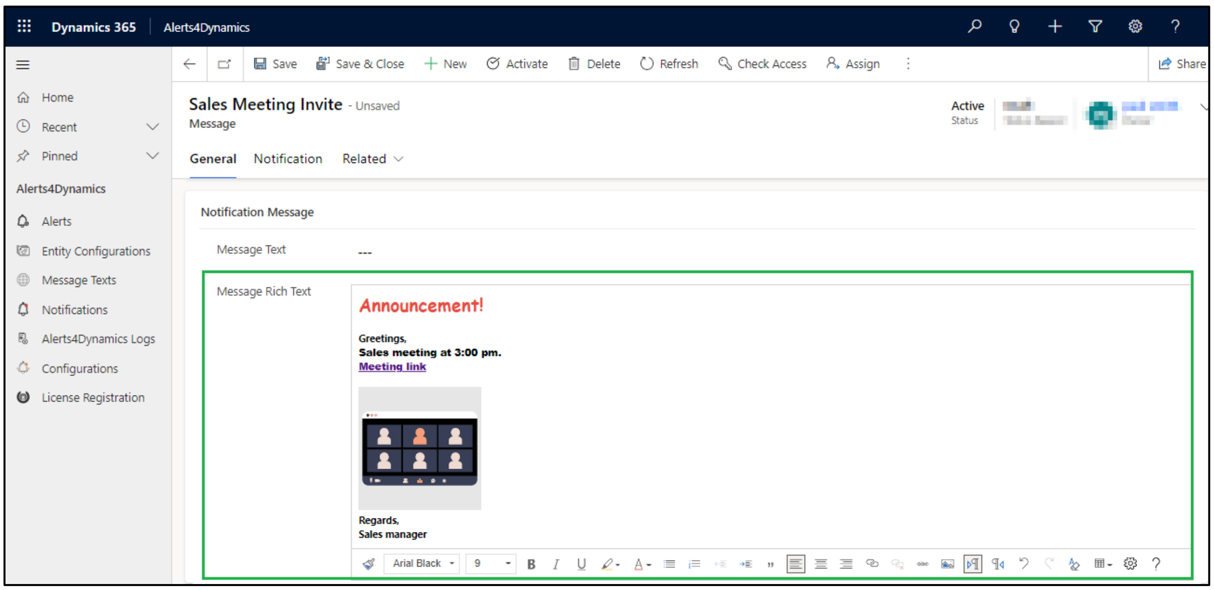


Message Rich Text

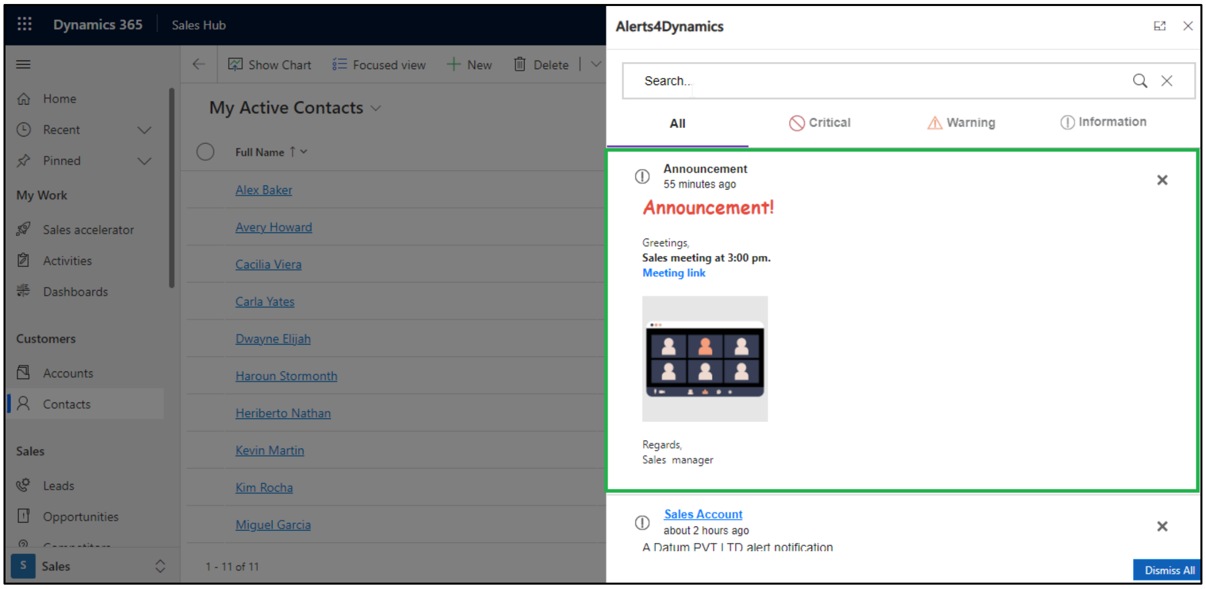
This provision allows users to create more interactive messages by doing all kinds of text formatting, adding links and images, etc., to make their alerts and notifications more descriptive and engaging.

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.



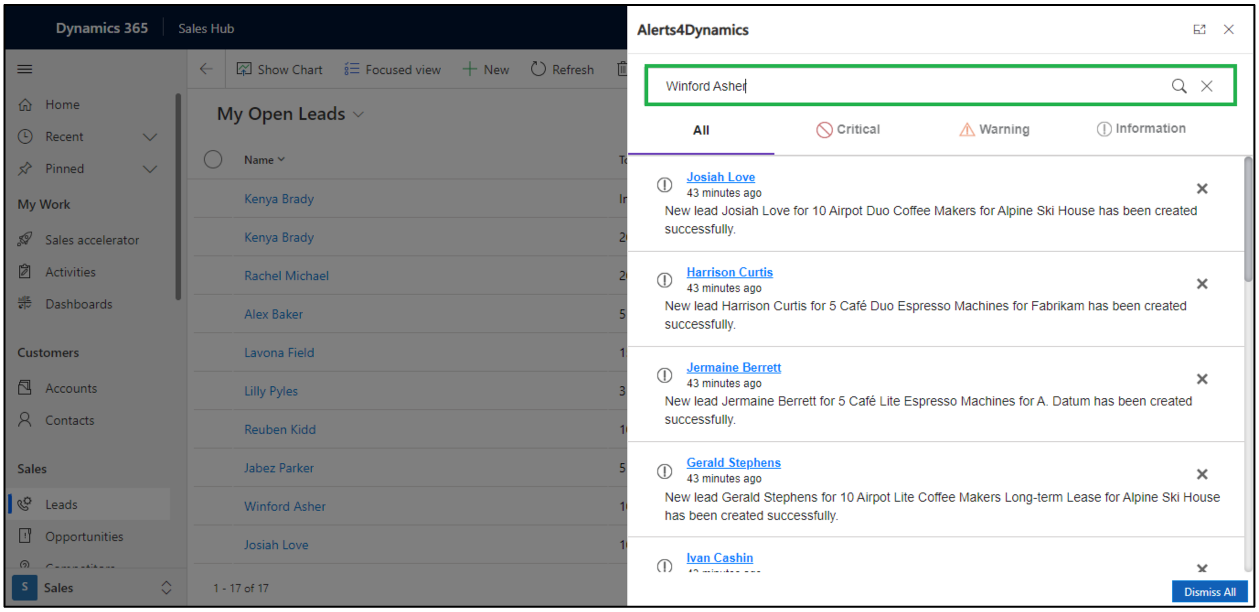
Note:

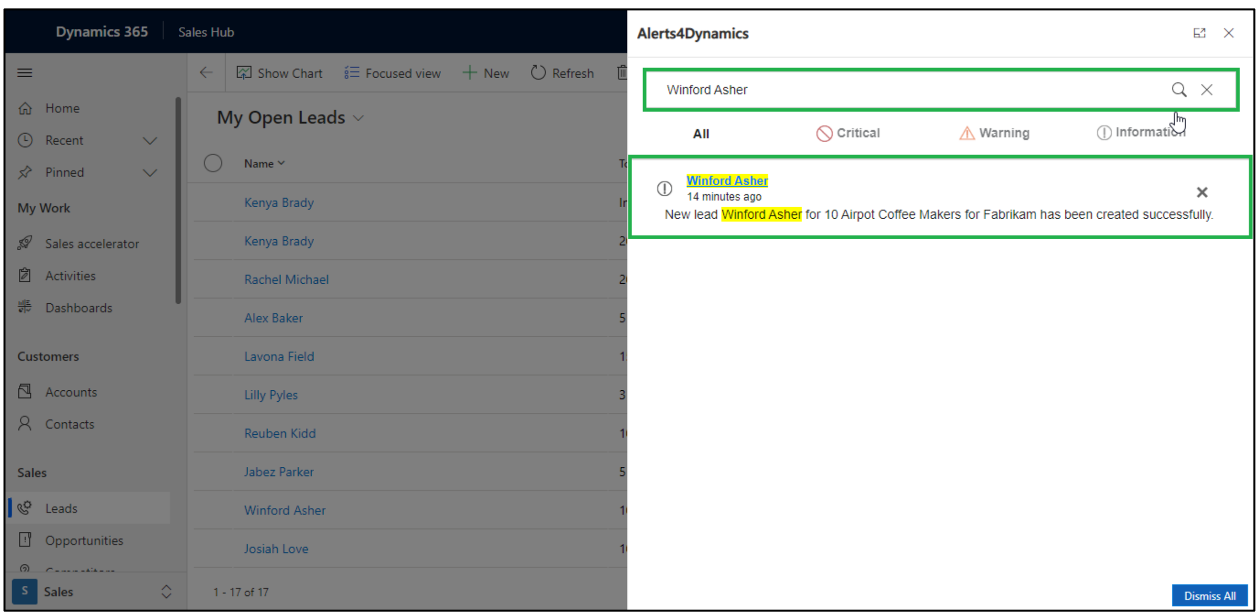
- ***If both Message Text and Message Rich Text fields are filled, then preference will be given to Message Rich Text when displaying the notification.***
- ***Message Rich Text cannot be displayed as a bar in a form notification.***
- ***To add Message Rich Text in Event-Based Alerts you need to create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

Search Notifications

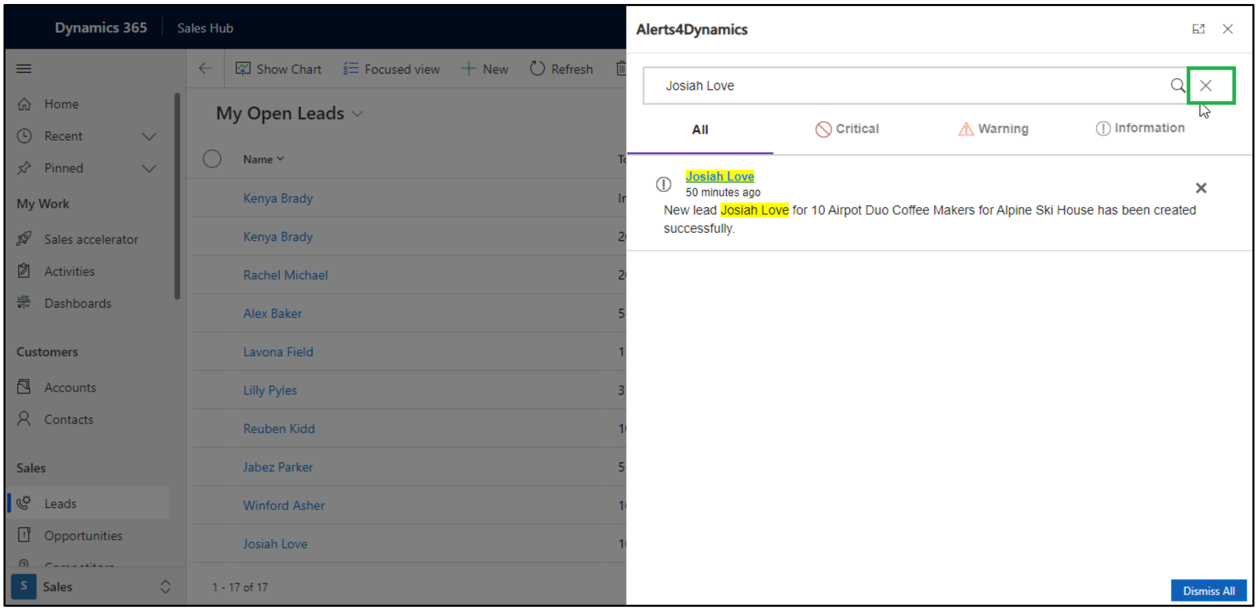
With the search notification feature on the notification panel, users can quickly search for desired Announcements and Notifications.

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.





Users can clear all the search results by using ‘**Clear Icon**’.



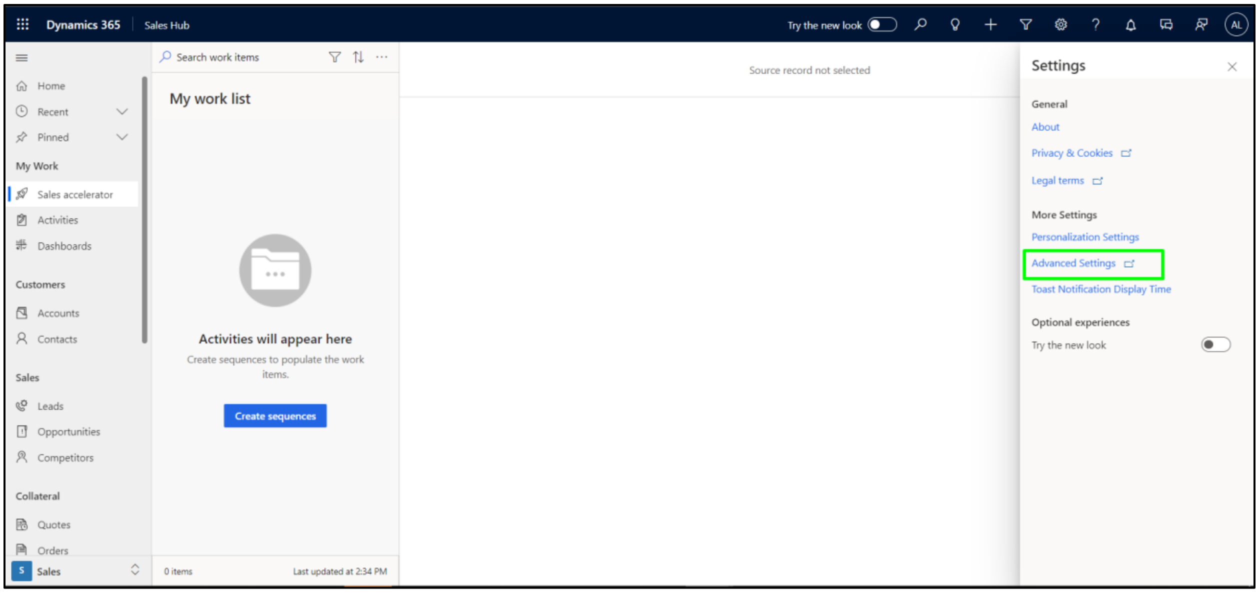
Email Digest Workflow Configuration

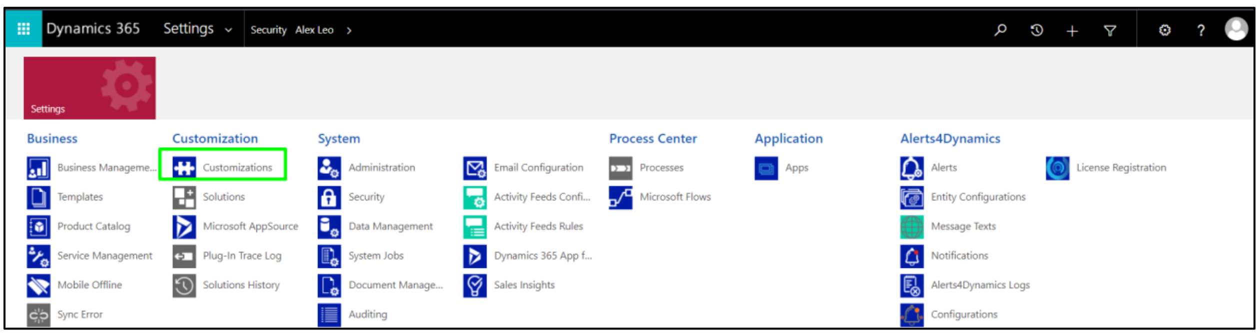
With Email Digest Workflow feature, users with an Alerts4Dynamics administrator role, manager or user role can receive, unread, read not dismissed, or all notifications as email. Users can receive the email automatically on a Daily, weekly, and Monthly basis.

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.

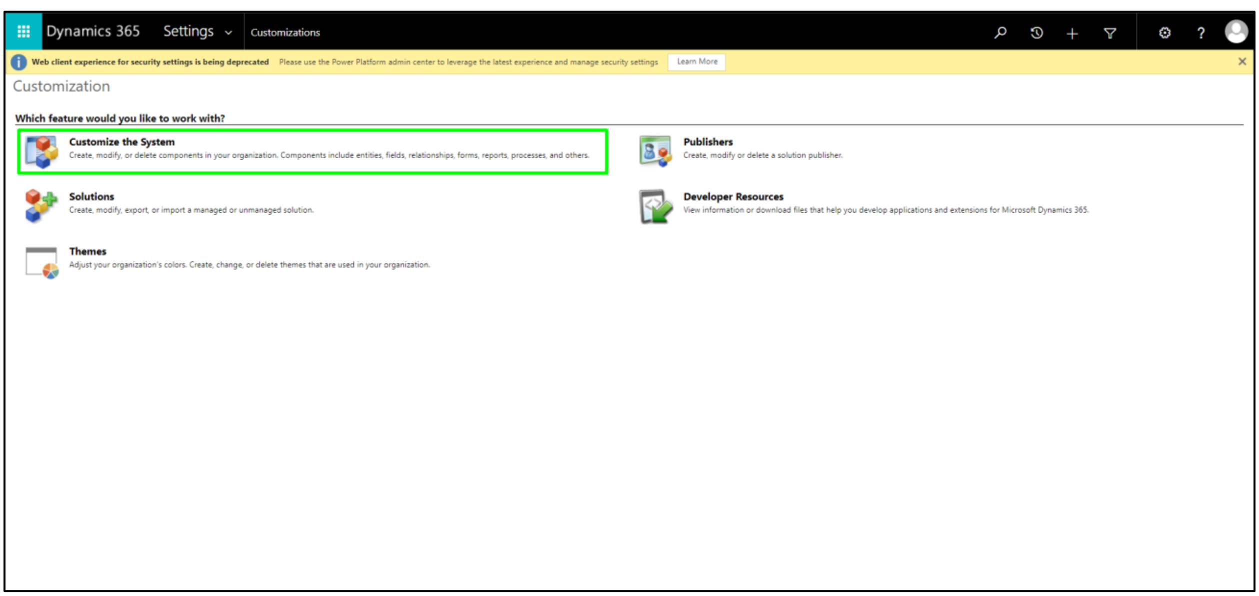
To set up the email template follow, the steps below:

- Go to **Advanced Settings → Customizations.**

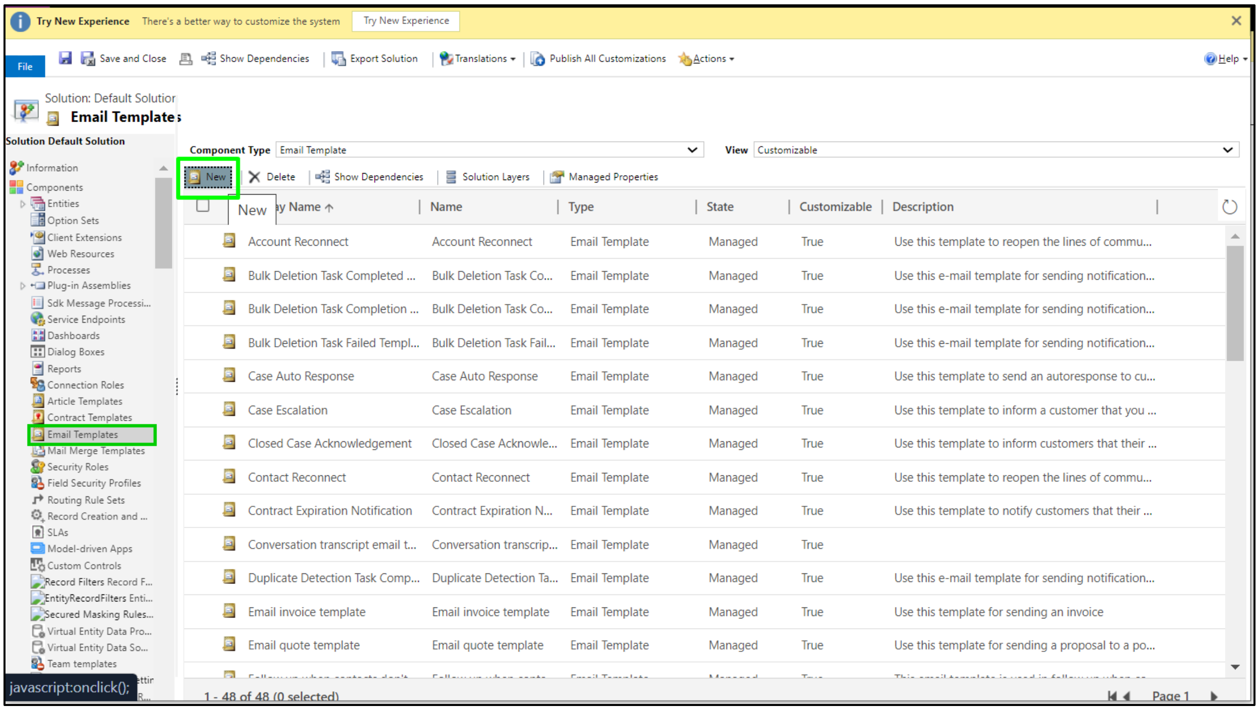




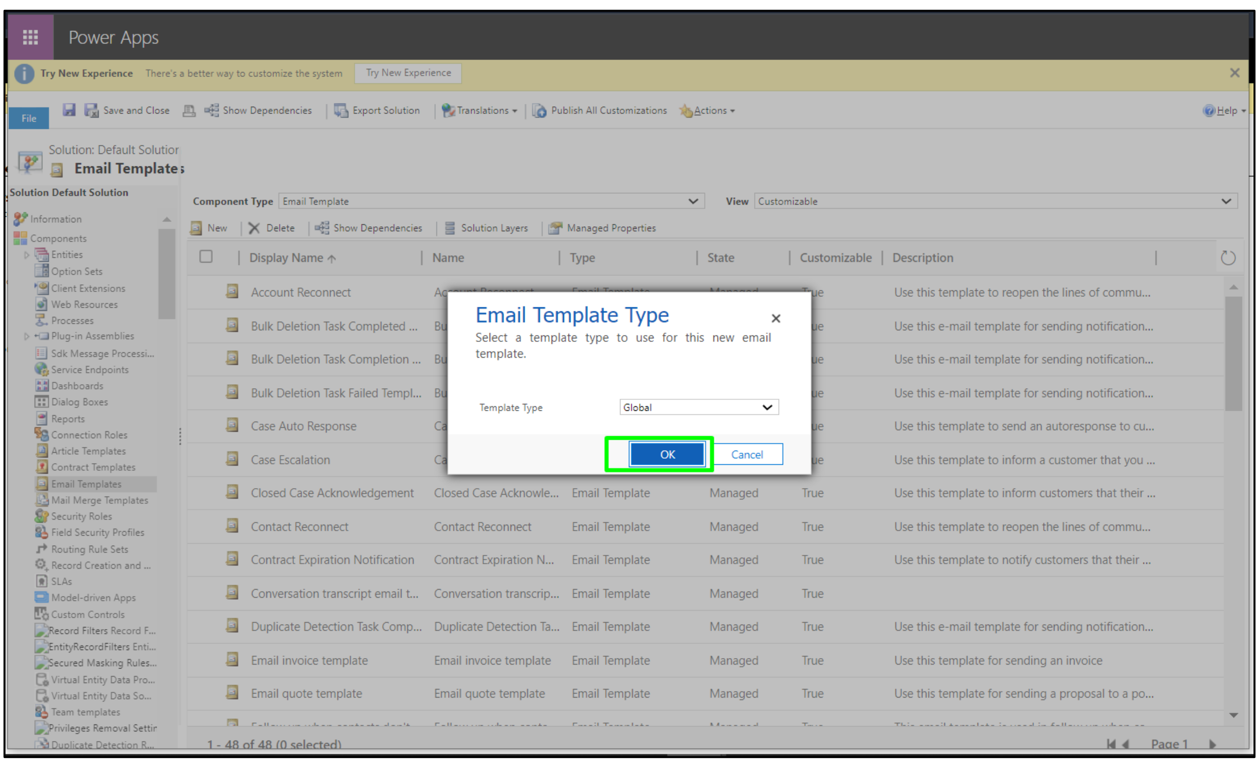
- Choose “**Customize the System.**”



- Select **“Email Templates”** and click on **“New”** button.

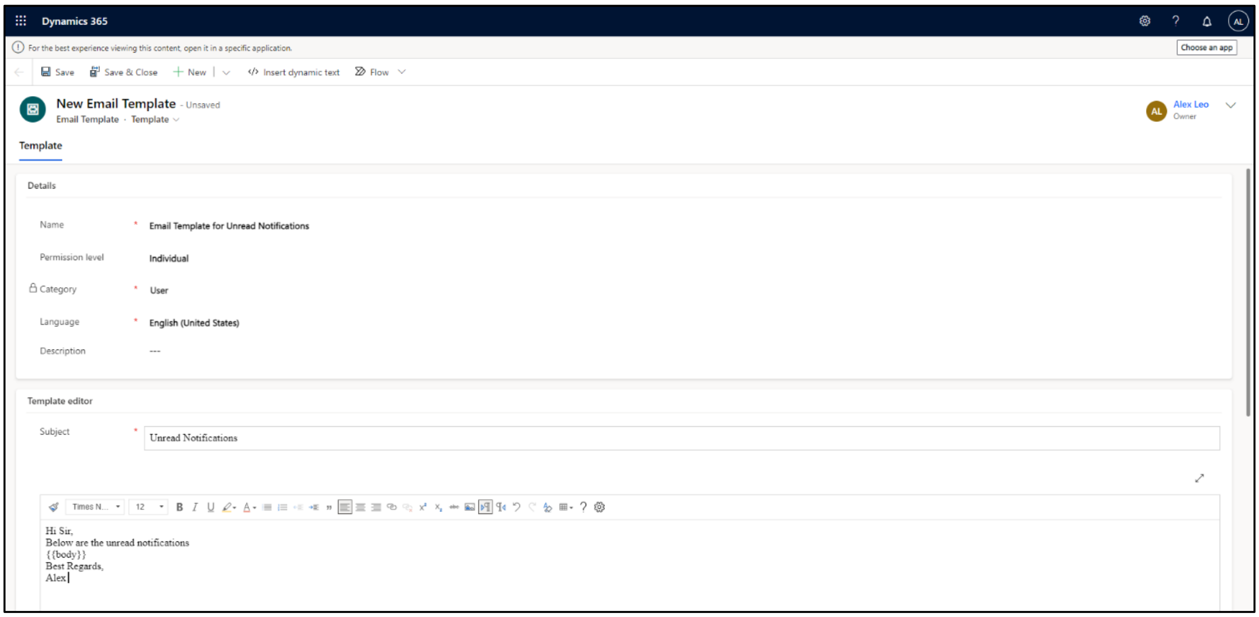


- Select Template Type as **"Global."** Let it be that way and click **"Ok."**

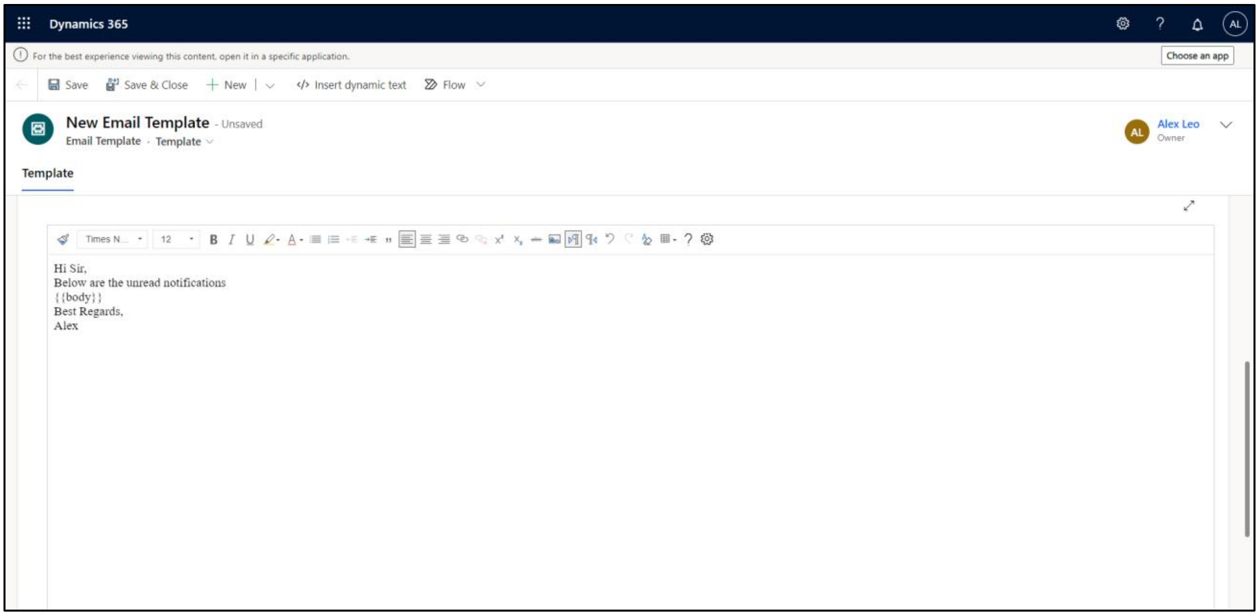


- Now, set up an email template based on your requirements. Here, we will create an email template for sending unread notifications as mail.

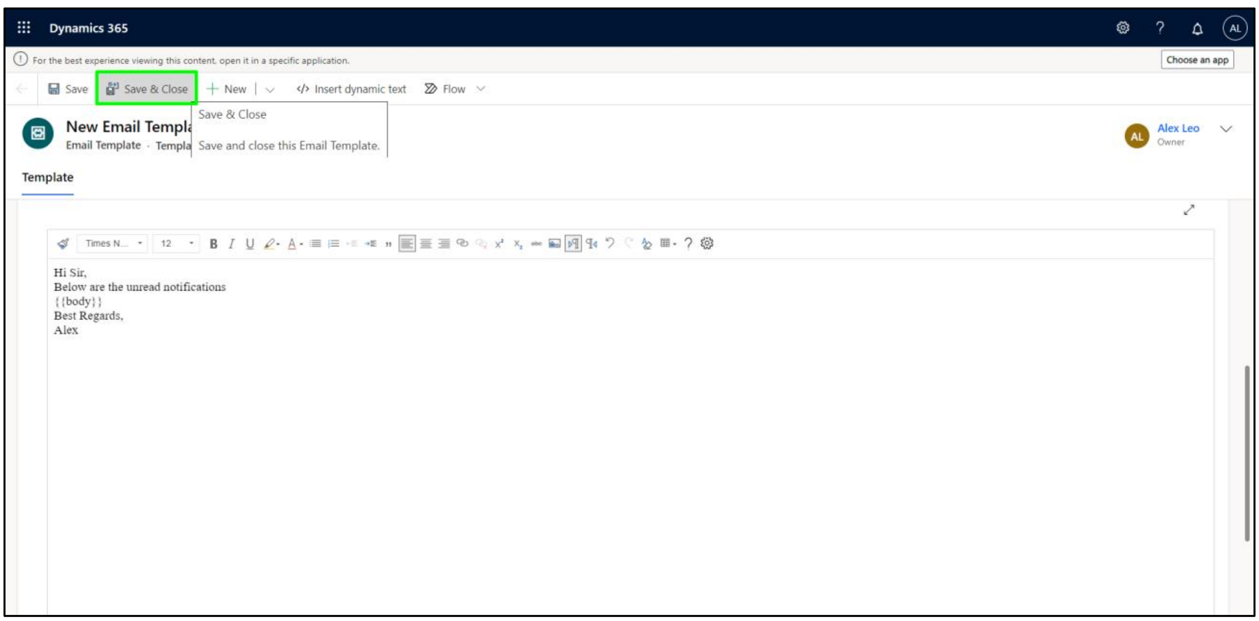
- Fill in the following fields:
    - **Name:** Give a suitable name for the Email Template.
    - **Permission Level (Option):** By default, permission level is set to **"Individual."** You can select your desired permission level.
    - **Category:** By default, it is set to **"User."**
    - **Language:** 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".**



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



- Click on **“Save & Close”.**

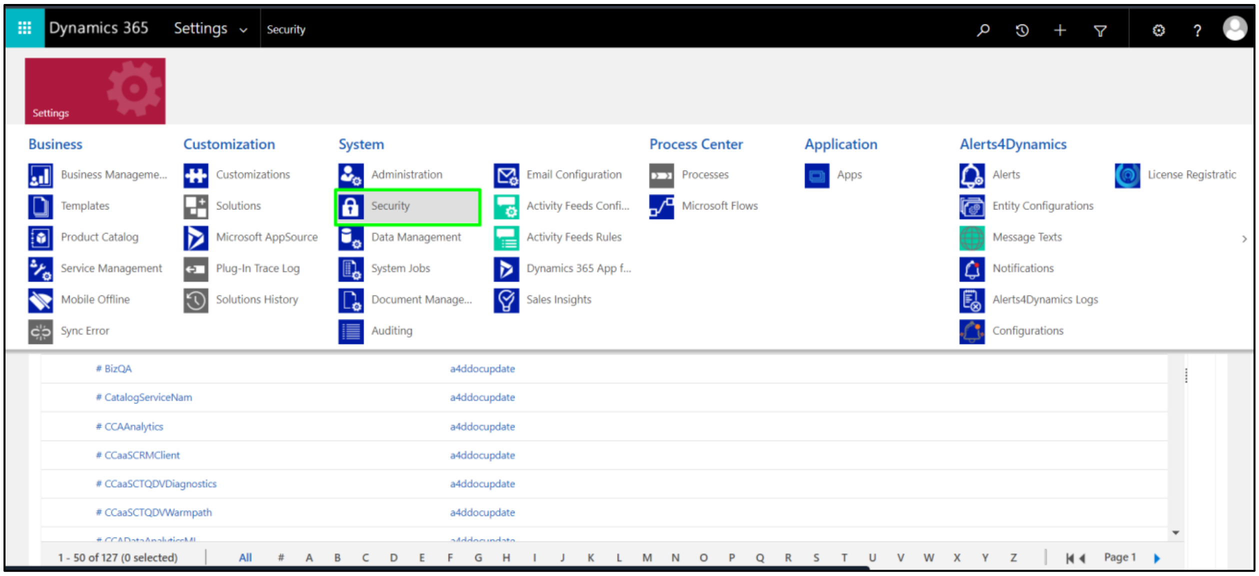


Note:

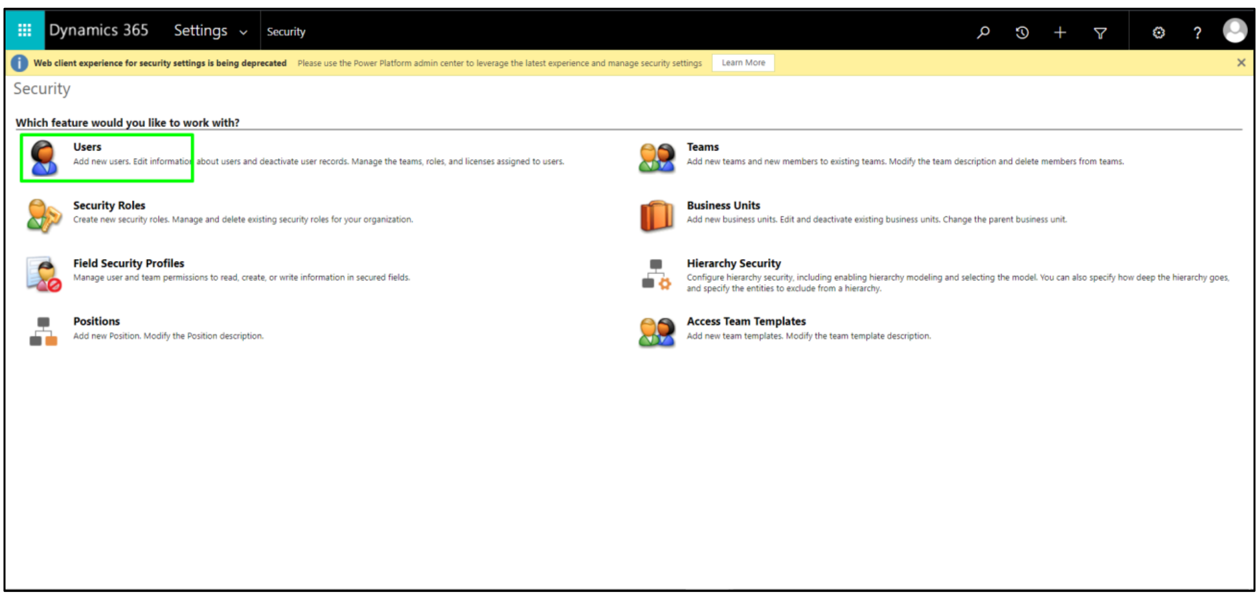
- ***You can only send up to 100 notifications in an email.***
- ***To send notifications in the email body, you need to write this text as is “*{{body}}*”.***

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.

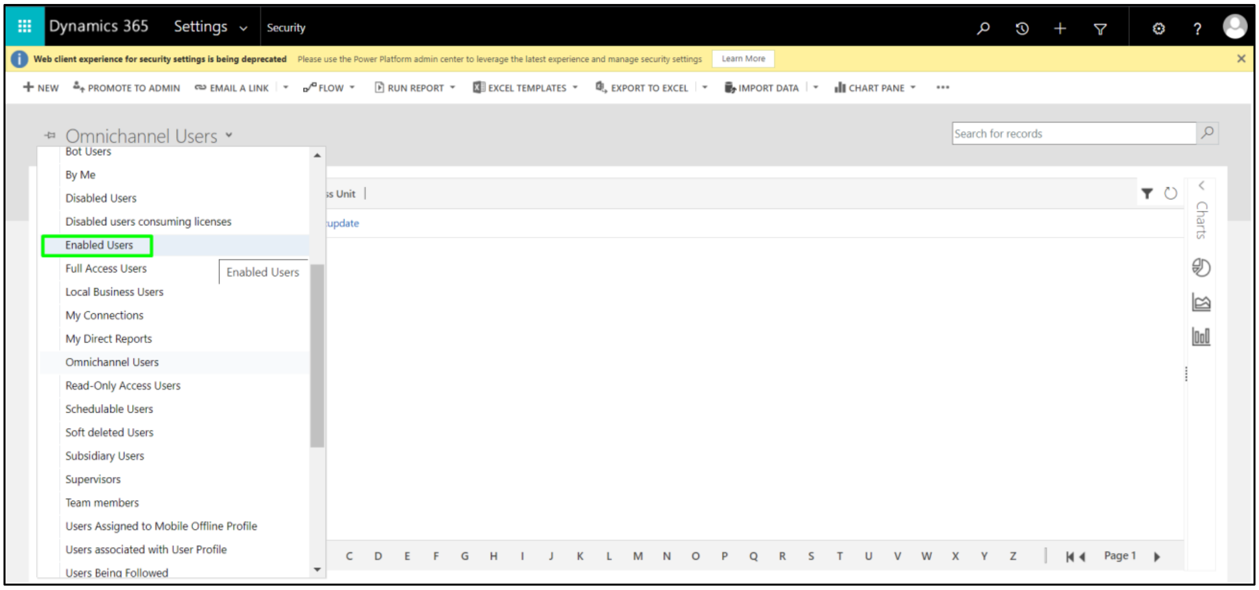
- Navigate to **Advanced Settings → Security.**



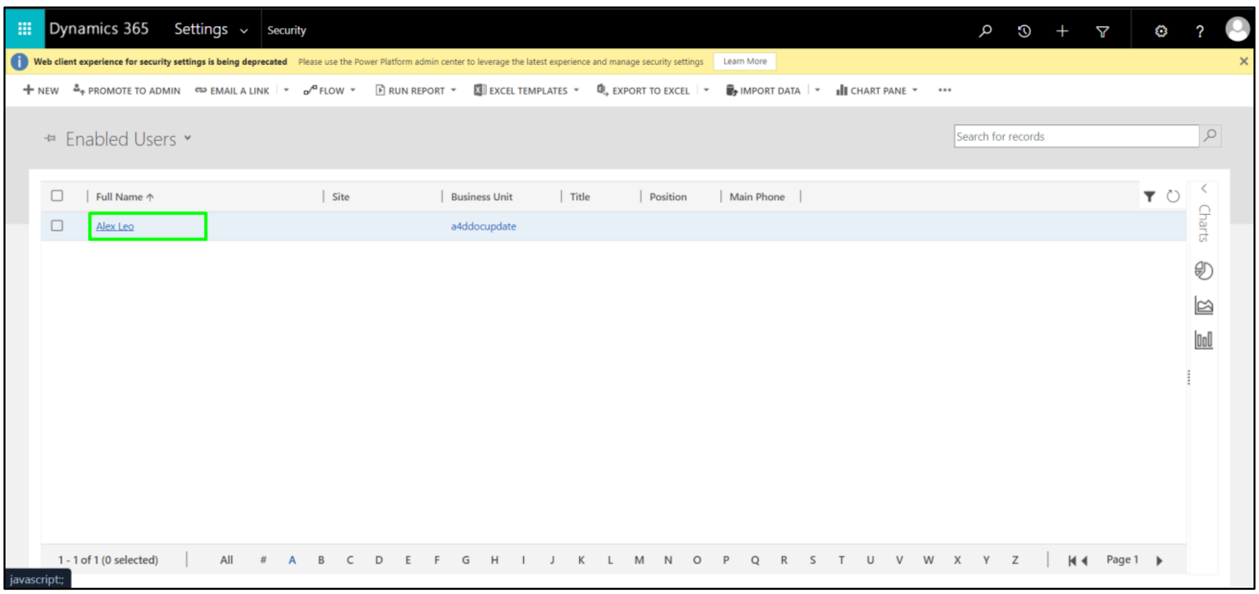
- Select **"Users".**



- Click on **"Enabled Users".**

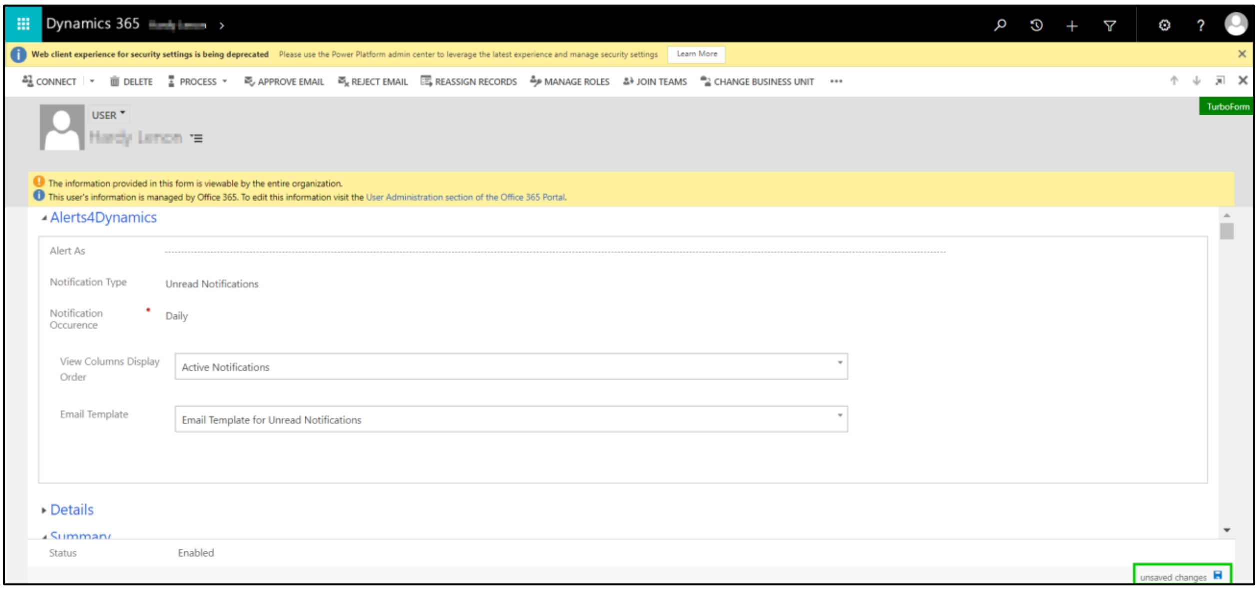


- Select the user to whom you want to assign the email template .



- 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.



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.***

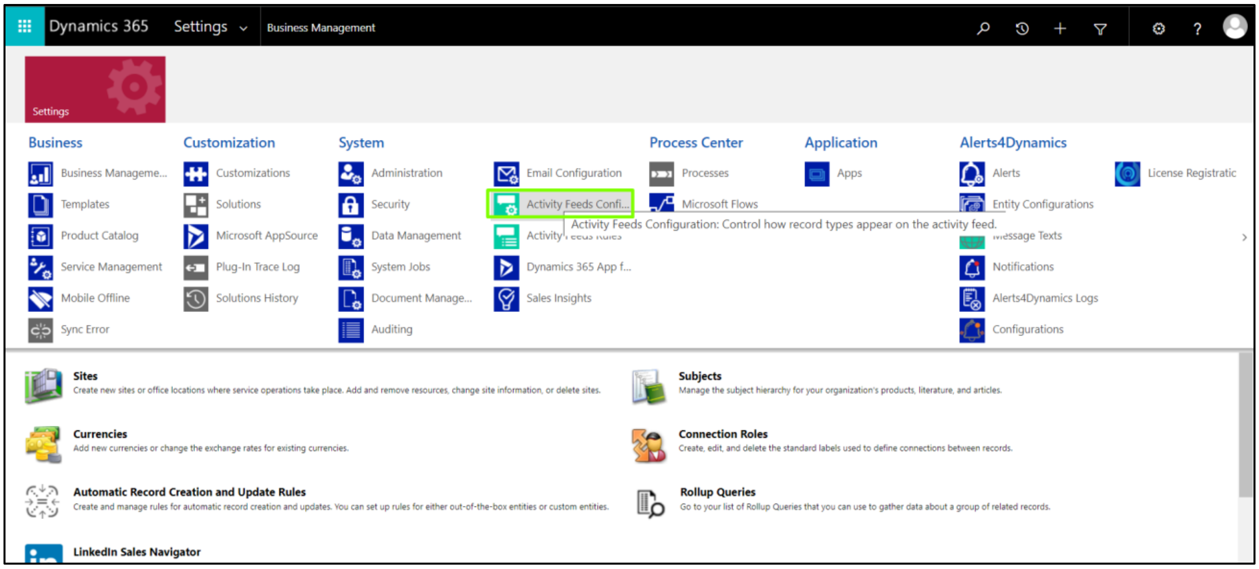
Once you have successfully configured the email template and assigned it to your desired user, you will be able to receive the notifications as emails. You can see the result of the above configuration here.

Post Notification Configuration

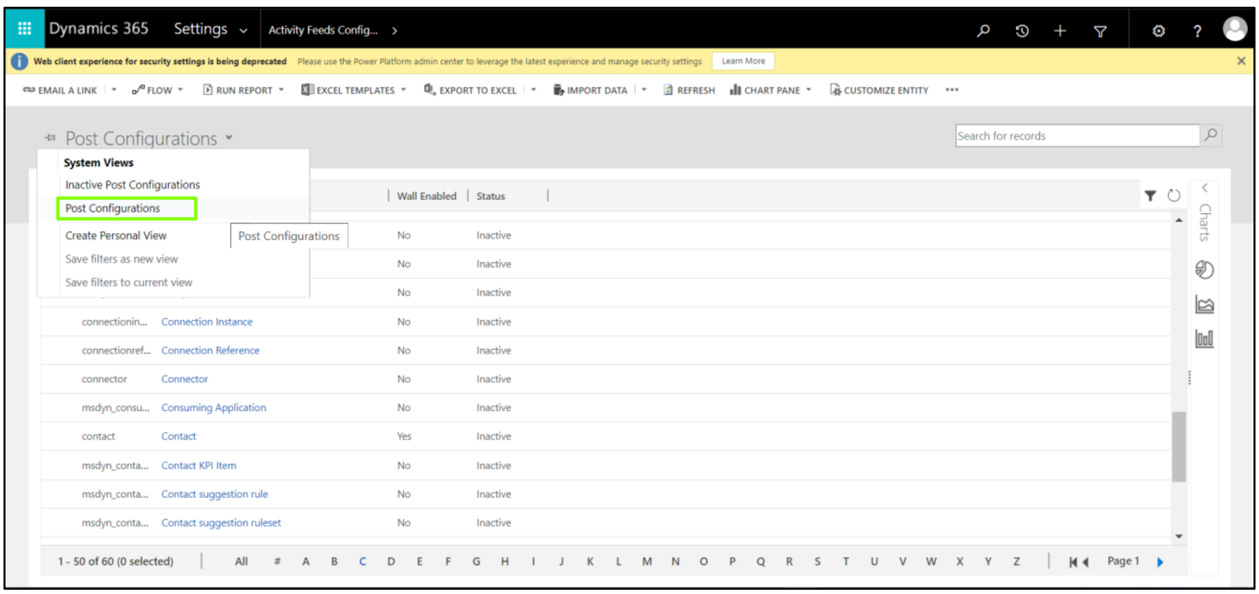
With Post feature, you can create and deliver custom post messages to users by tagging them directly from the CRM record form.

Follow the below steps to enable the post feature:

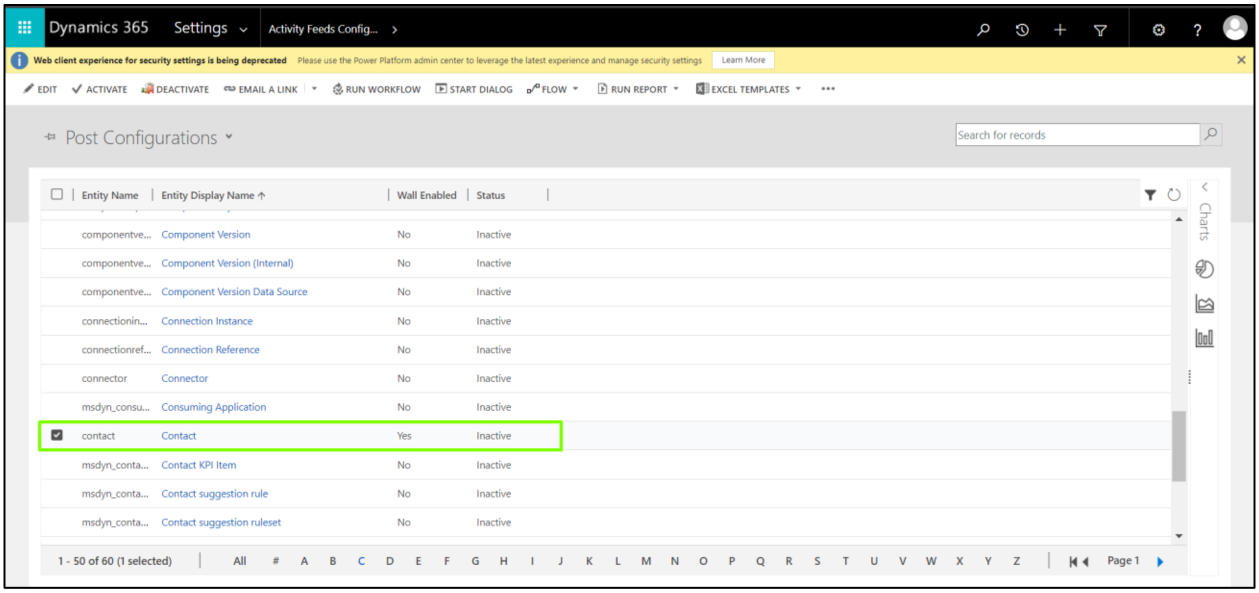
- Go to **Advanced Settings --> Activity Feeds Configuration.**



- Select **"Post Configurations"** in the system view.

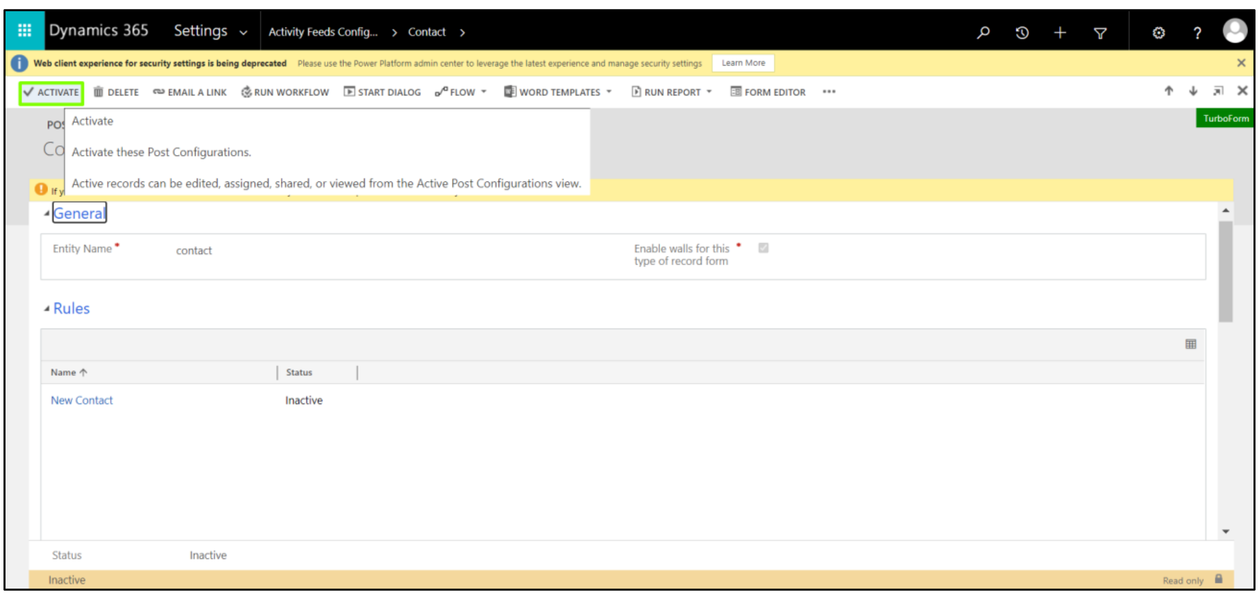


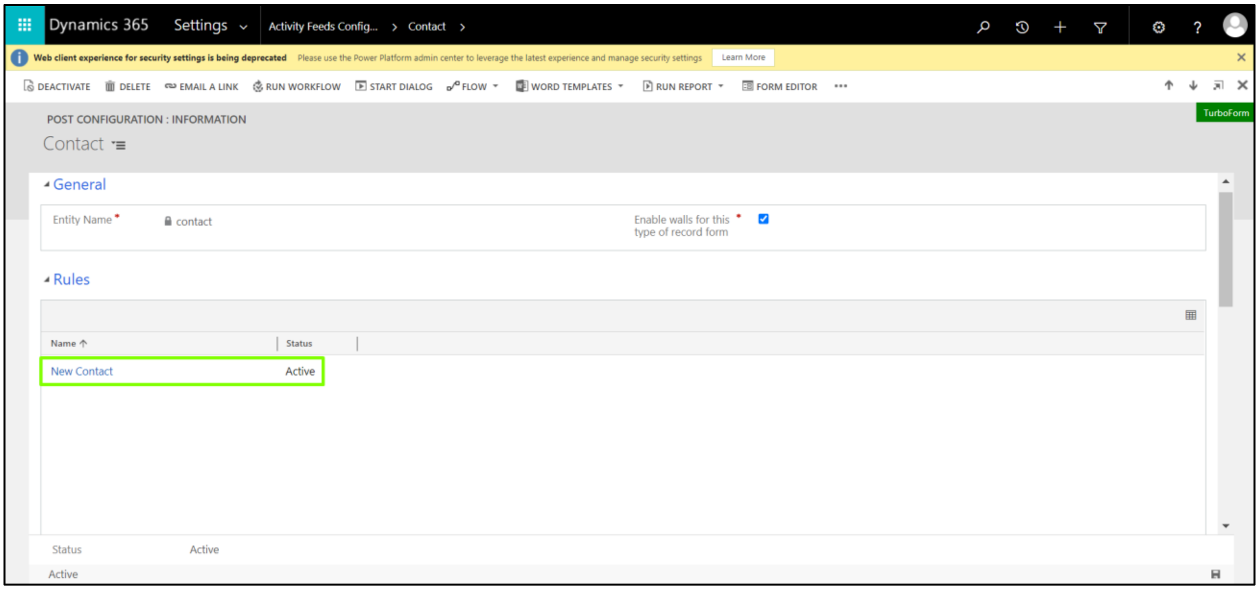
- Select your desired entity to enable the post feature for that specific entity. Here we will select **'Contact'** entity.



Note:

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

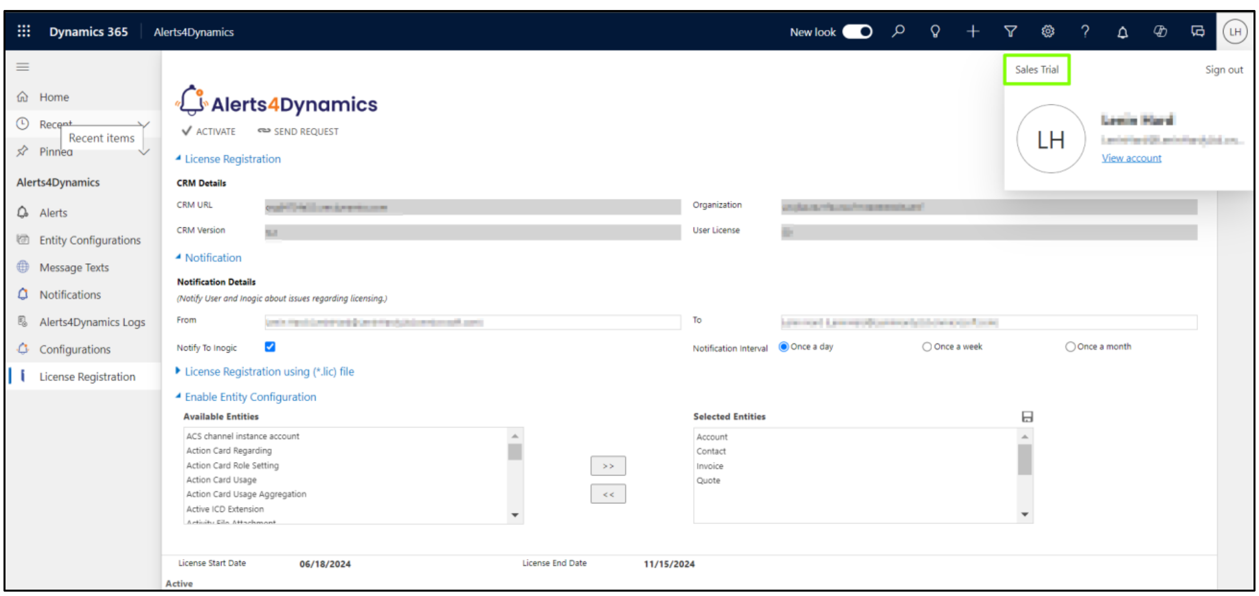




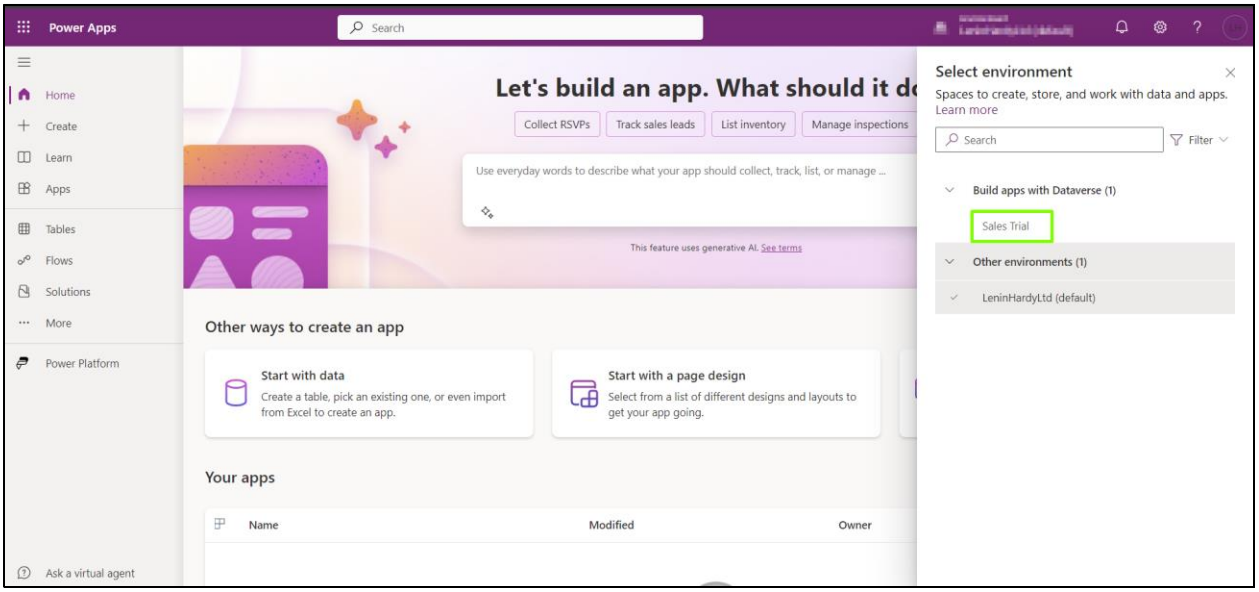
Once you have successfully enabled post feature for Contact entity, visit - https://make.powerapps.com to add post section to the timline of the contact record form.

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

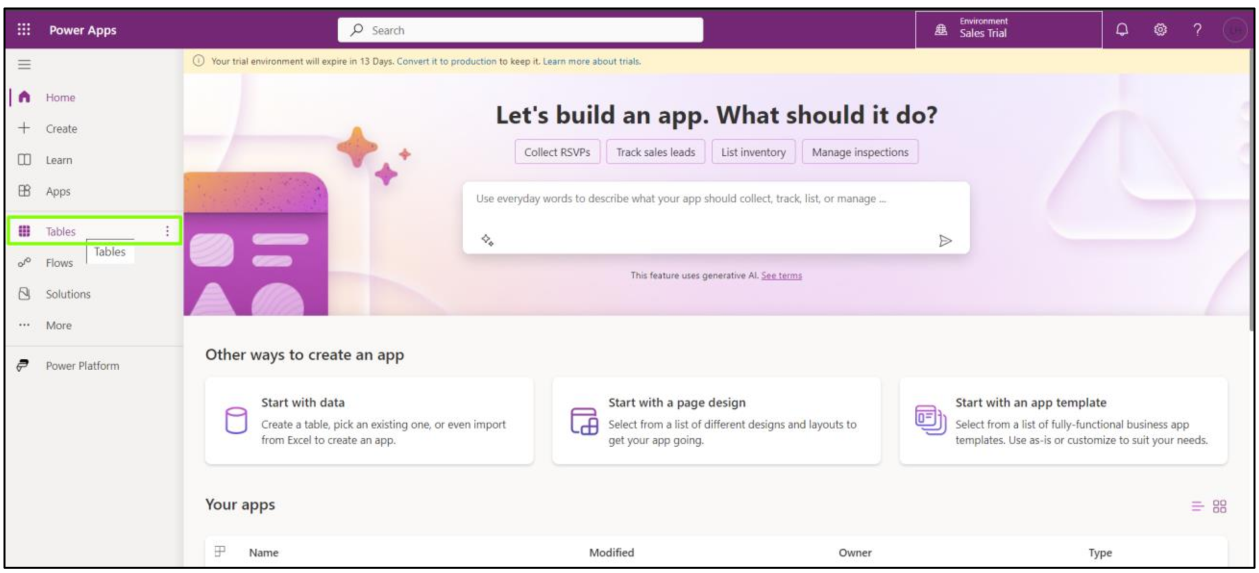
- **CRM:**



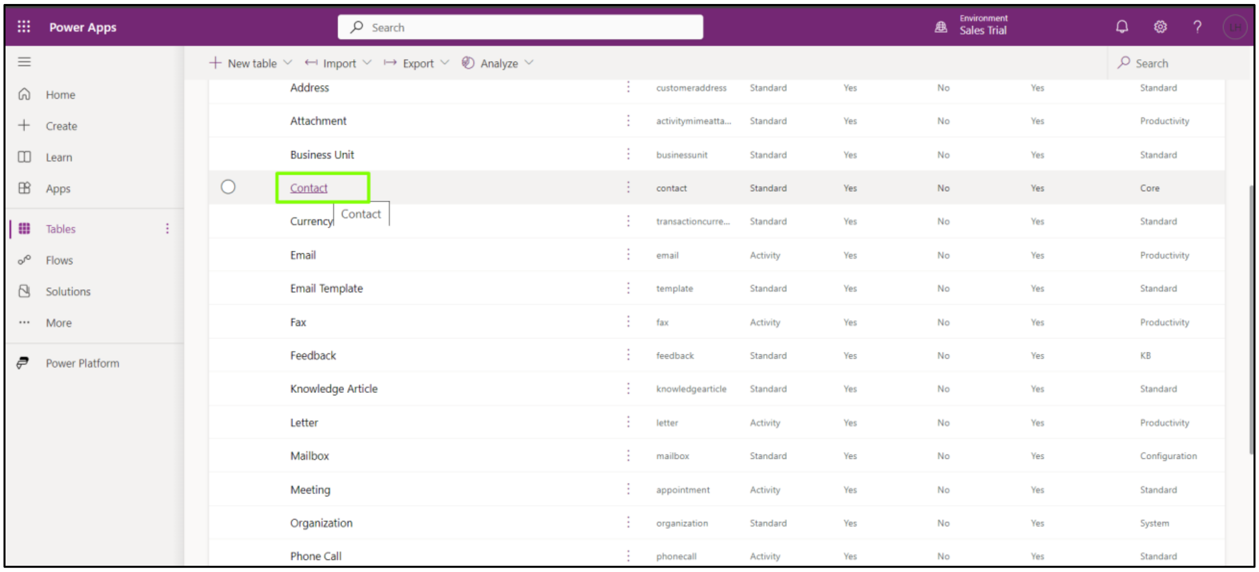
- **Powerapps:**



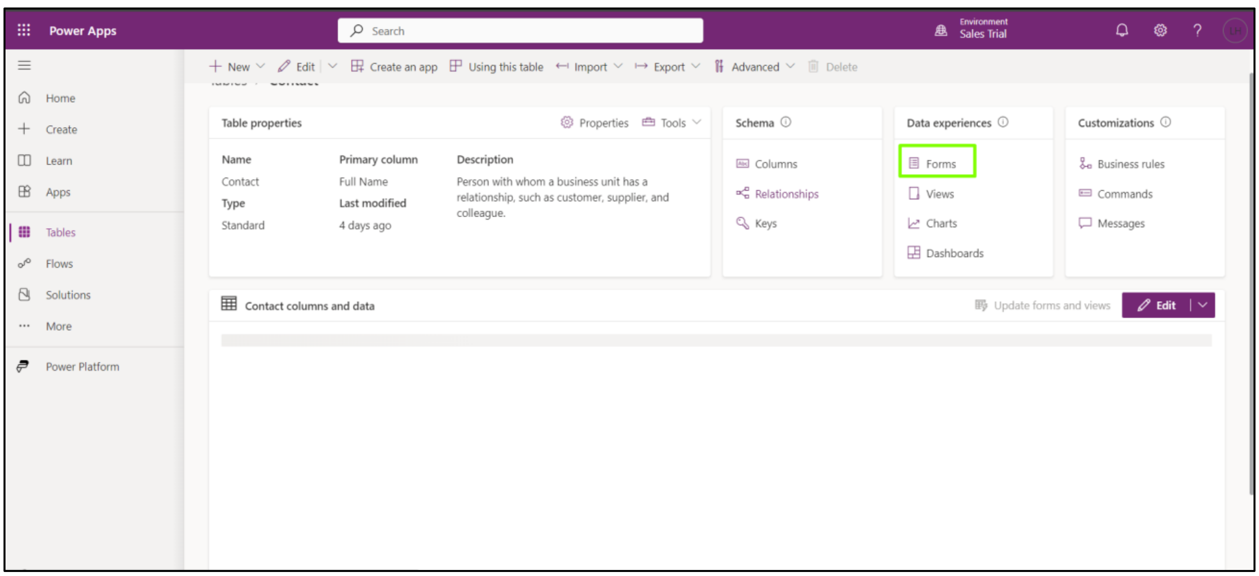
- Go to **'Tables'.**



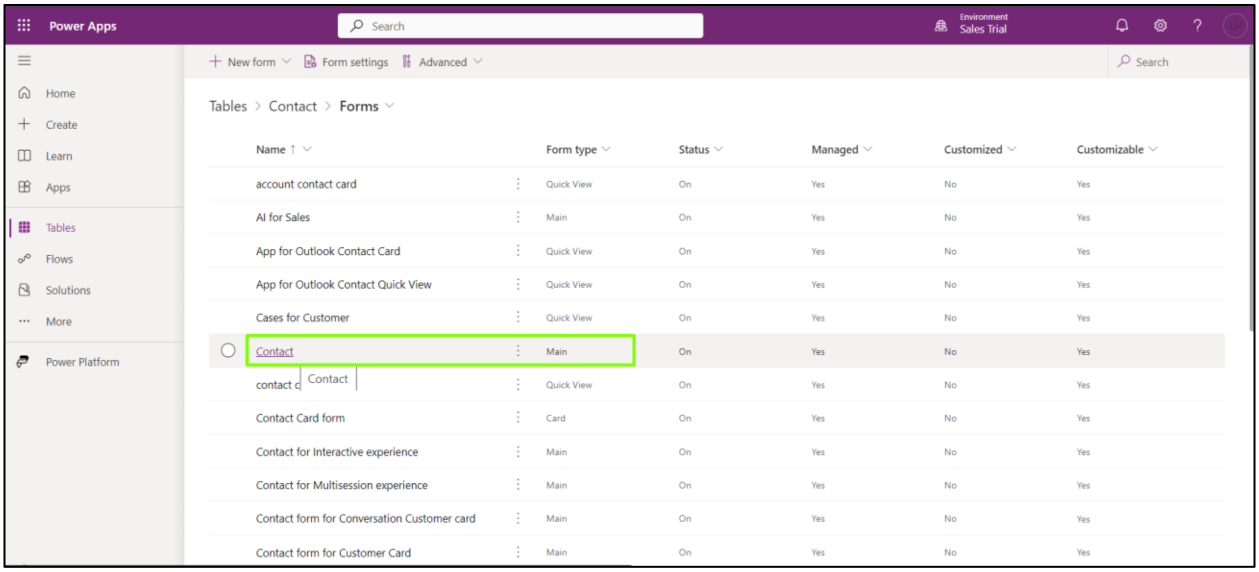
- Select **'Contact'.**



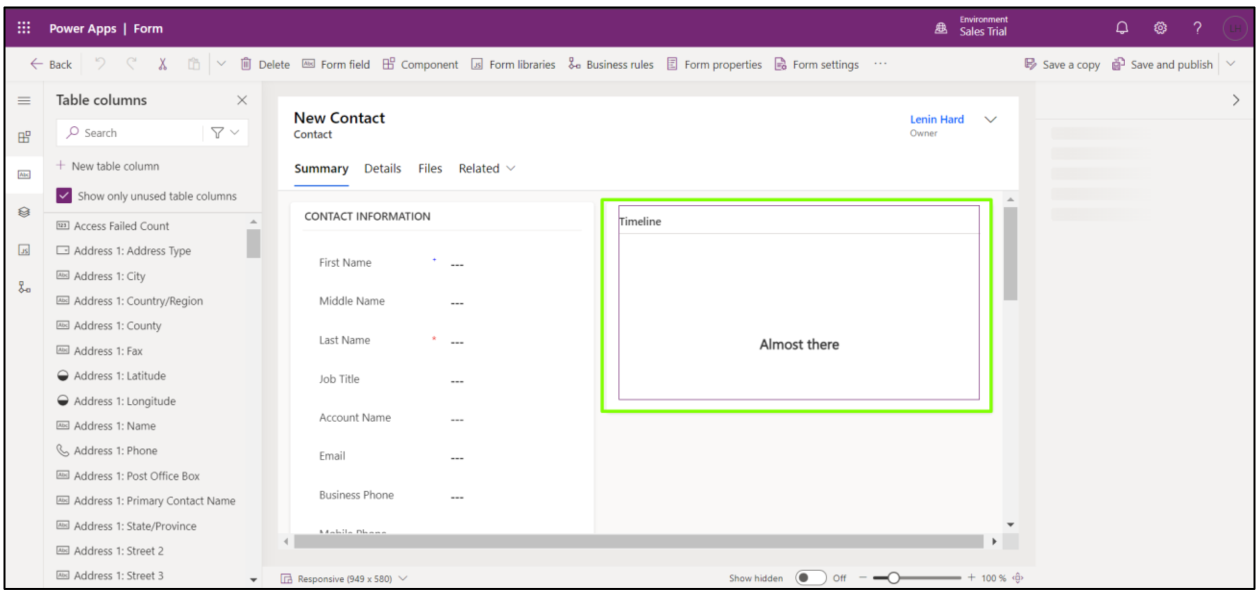
- Select **'Forms'.**



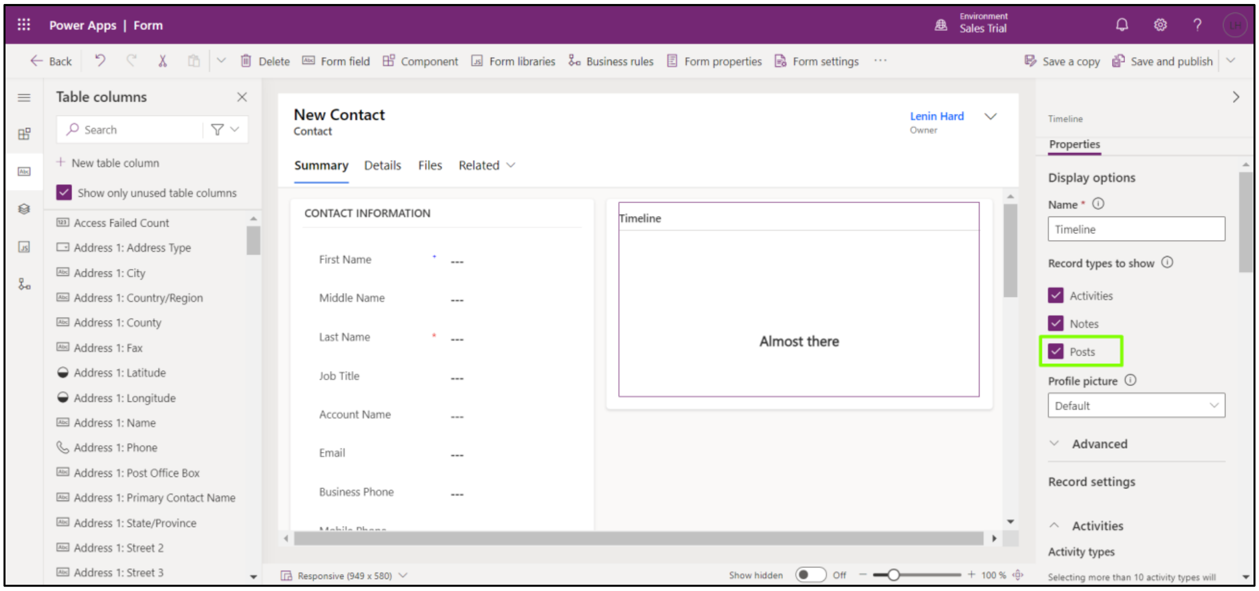
- Select main **'Contact'** form.



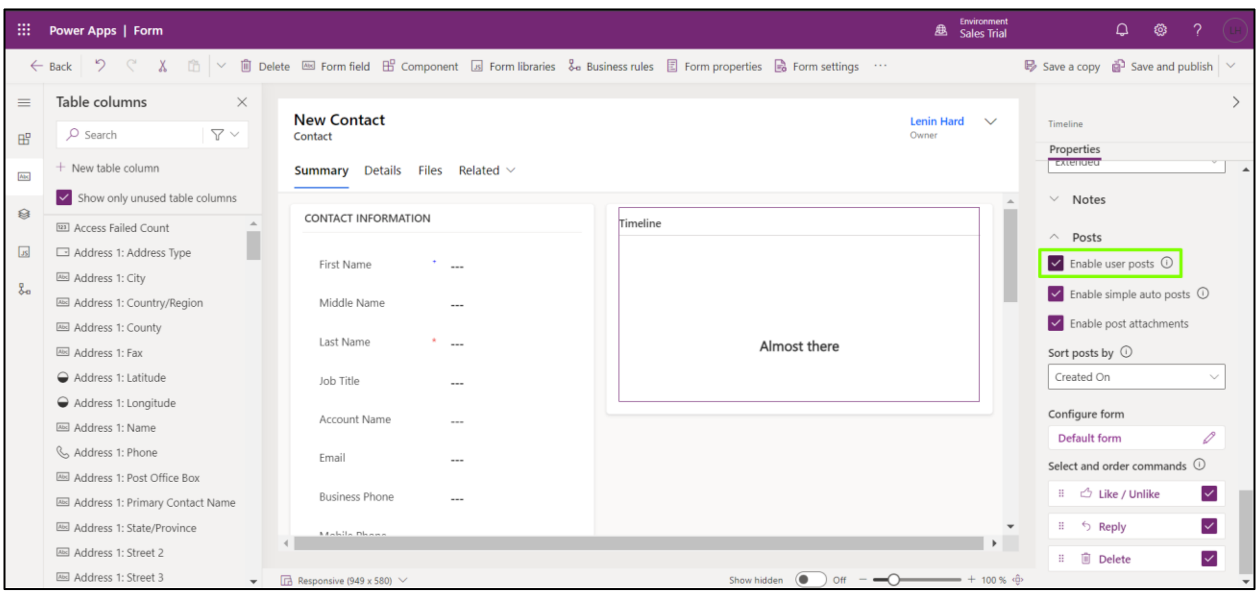
- Select **'Timeline'** section.



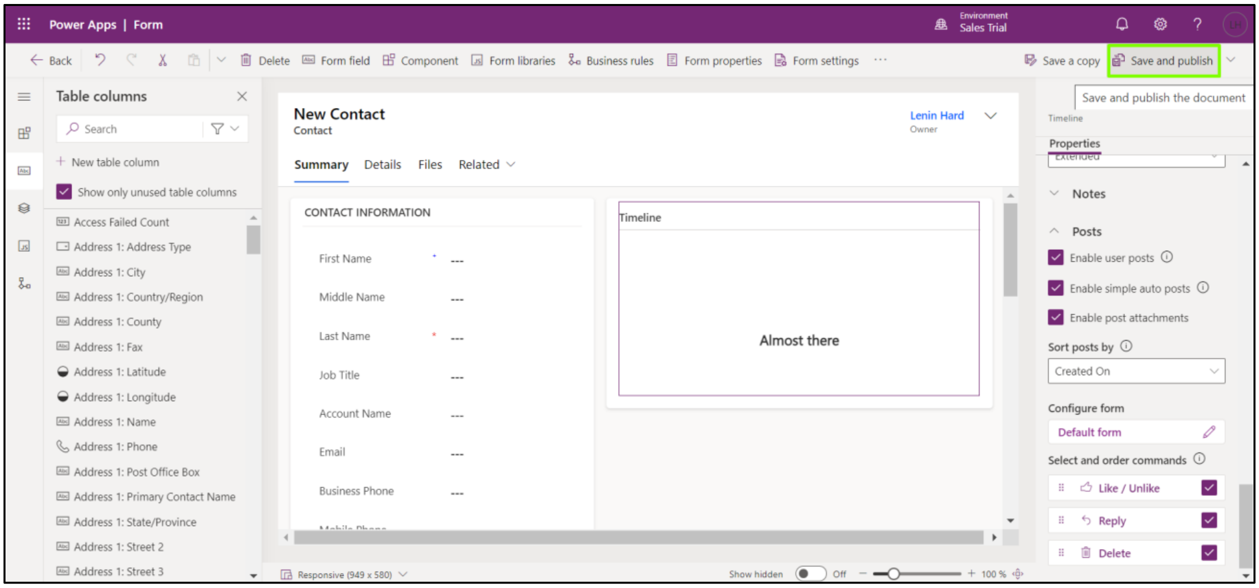
- Select '**Posts'.**



- Under posts section, choose **'Enable User Posts'.**



- Click **'Save and Publish'** to publish changes.

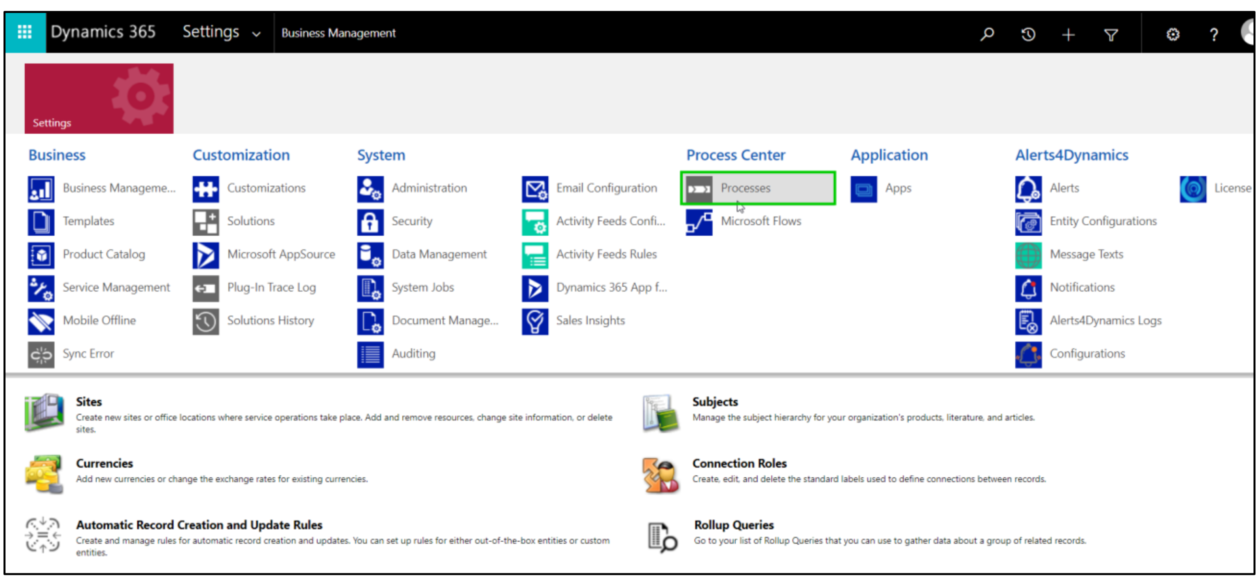


Once you have successfully configured the post notification feature for your desired entity, you need to set up a workflow in CRM to trigger post notifications for your specific needs.

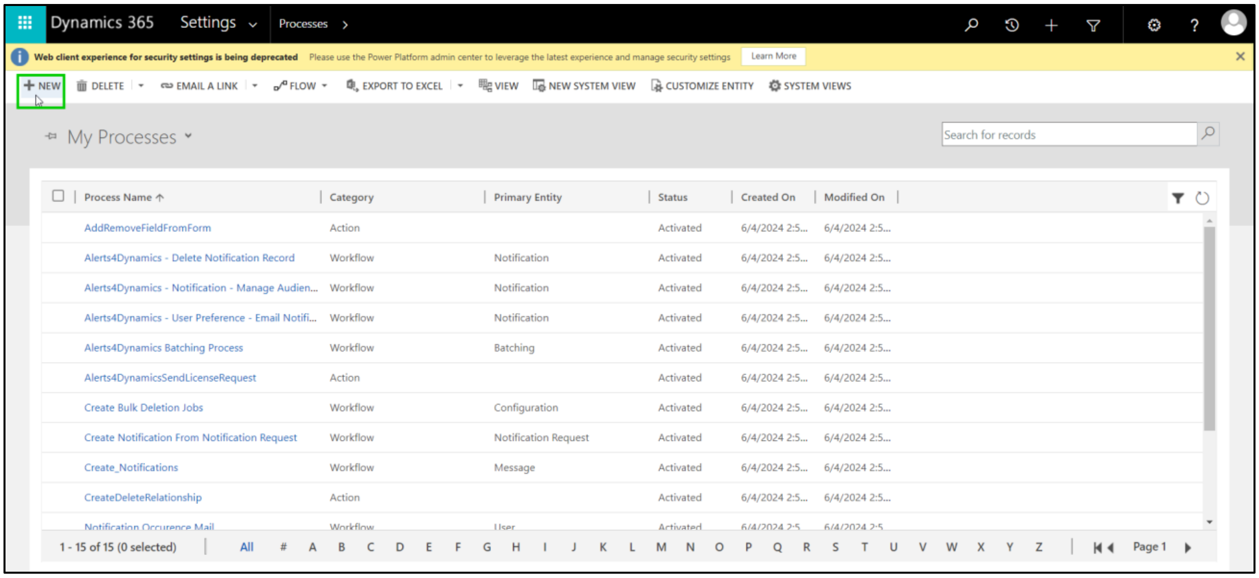
For example, here we will create a workflow for triggering post notifications when a single user is tagged with a custom post message on the timeline of the contact record form.

Follow the steps below to configure the workflow:

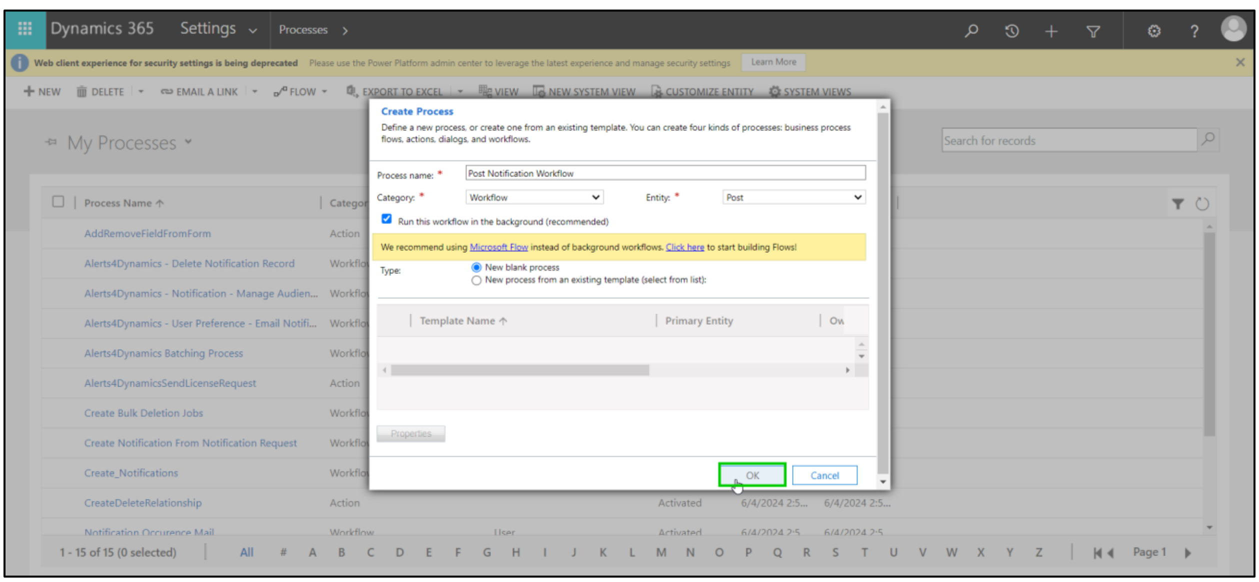
- Navigate to **Advanced Settings → Processes.**



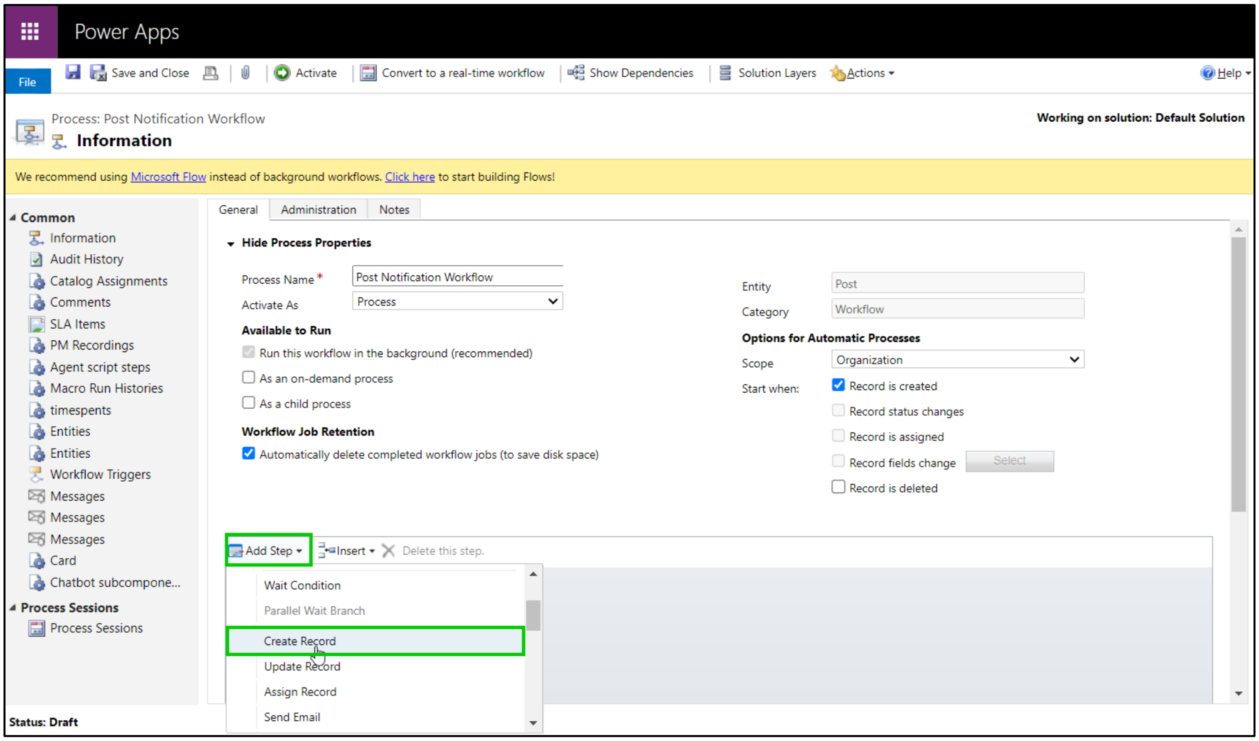
- Click on **'New'.**



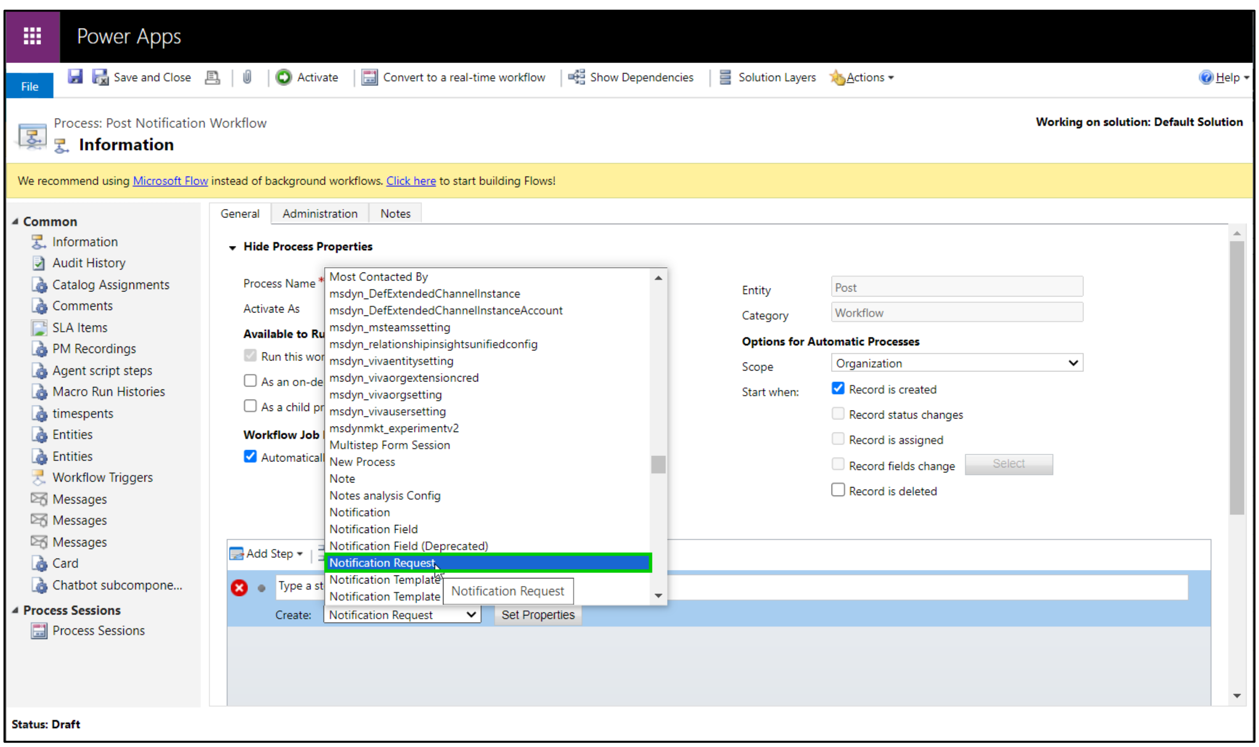
- **Process Name:** Enter a desired process name.
- **Category:** Select **'Workflow'**.
- **Entity:** Select **'Post'.**
- Click **'OK'**.



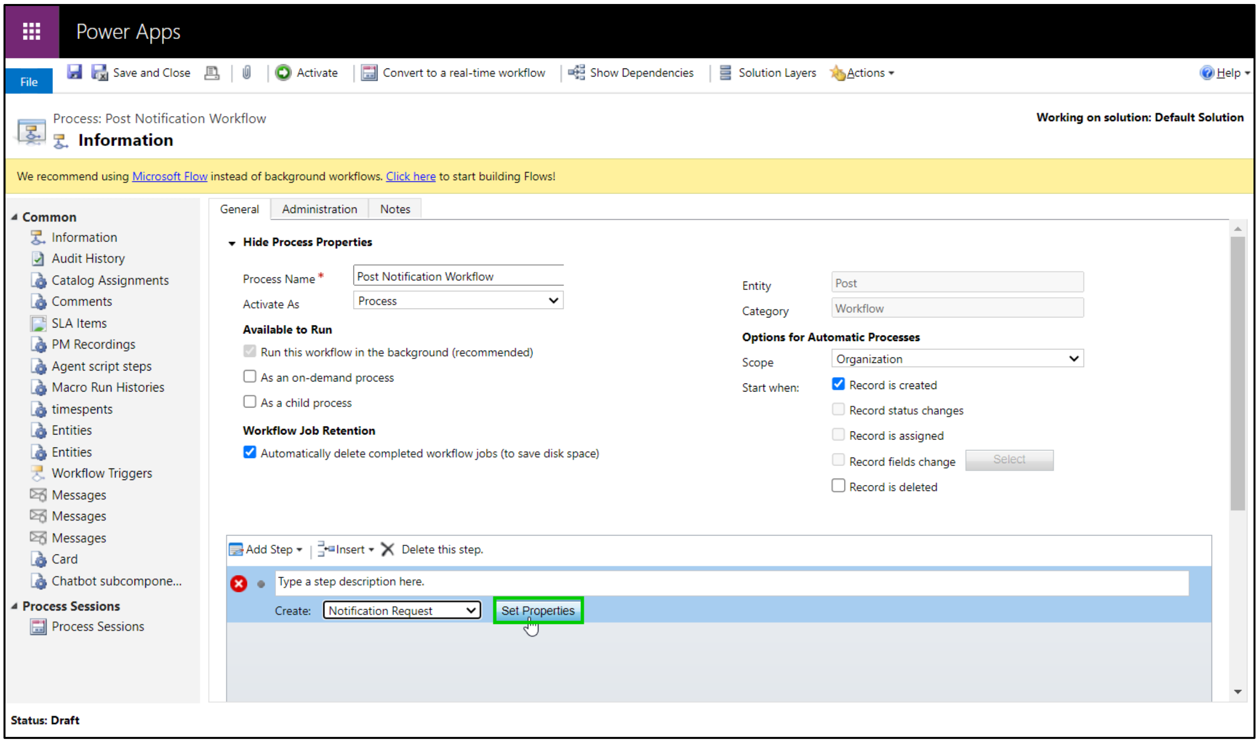
- Click on **'Add Step'** and select **'Create Record'.**



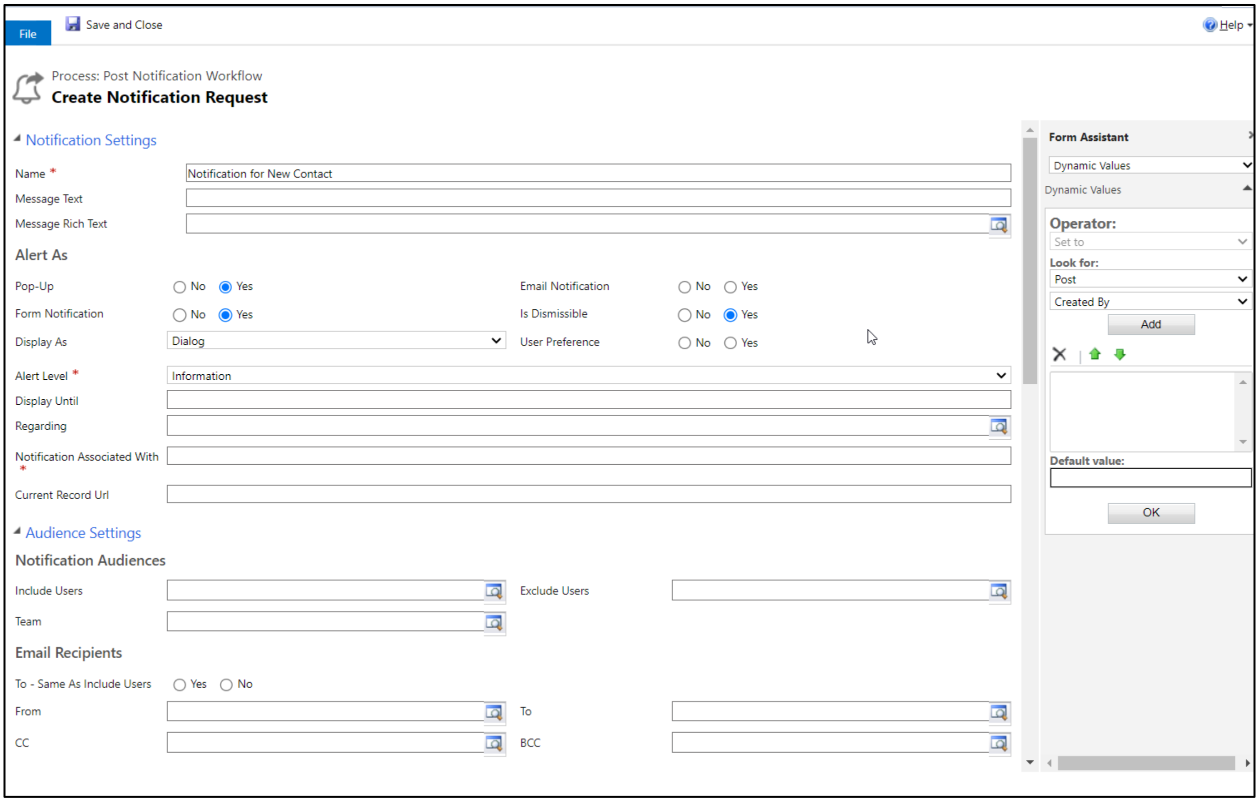
- Select **'Notification Request'**.



- Click on **'Set Properties'**.

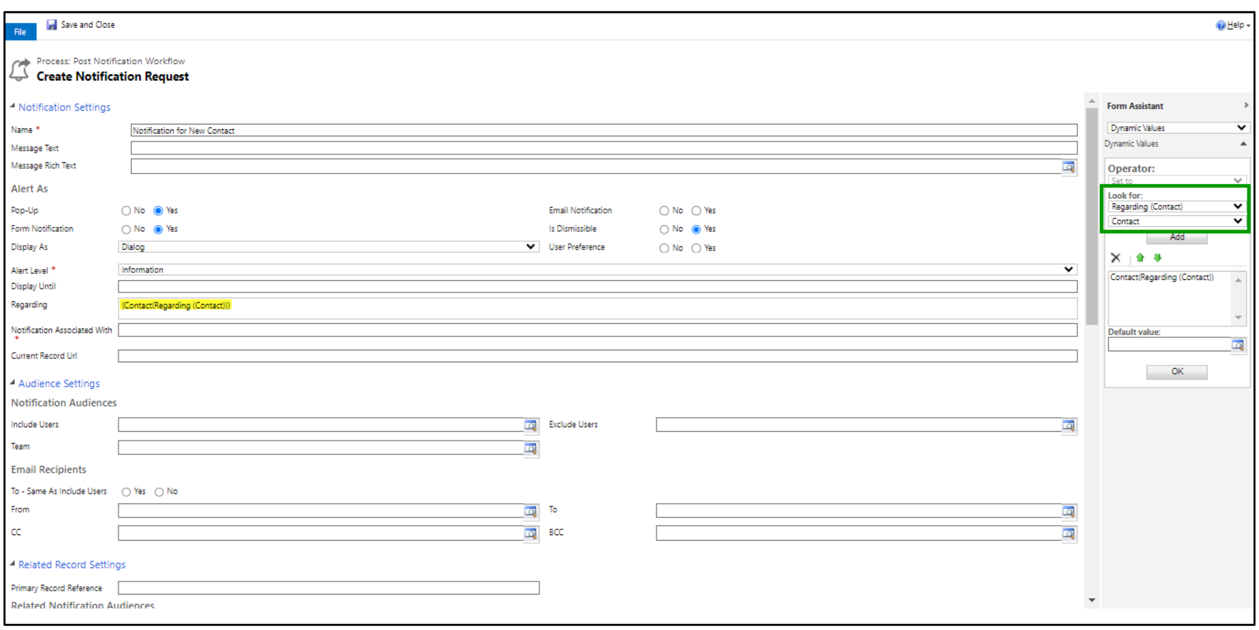


- **Fill in the following details:**
  - **Name:** Enter a Desired Name.
  - **Pop Up:** Set it to **'Yes'**.
  - **Form Notification:** Set it to **'Yes'.**
  - **Is Dismissible:** Set it to **'Yes'.**
  - **Display As:** Set it to **'Dialog'.**
  - **Alert Level:** Set it to **'Information'.**

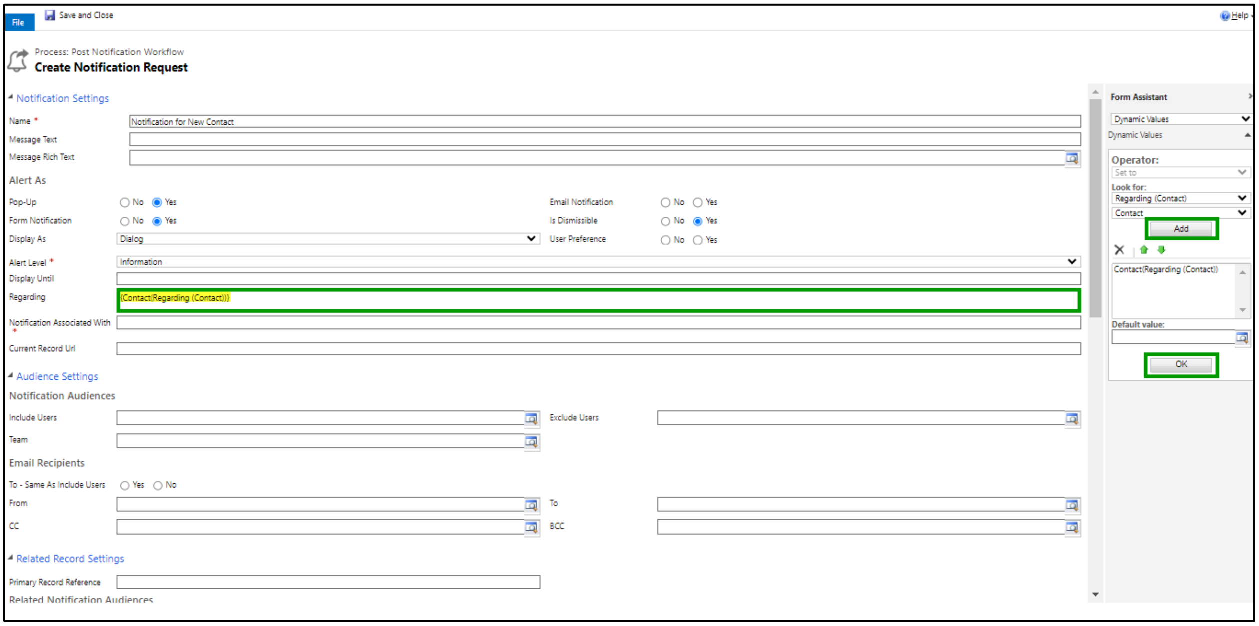


Note: Post feature gives priority to text in the Message Rich Text field. For example, if a user has added text to the message text, message rich text, and post sections on timeline, then while sending the notification to the user, first priority will be given to the text in the Message Rich Text field.

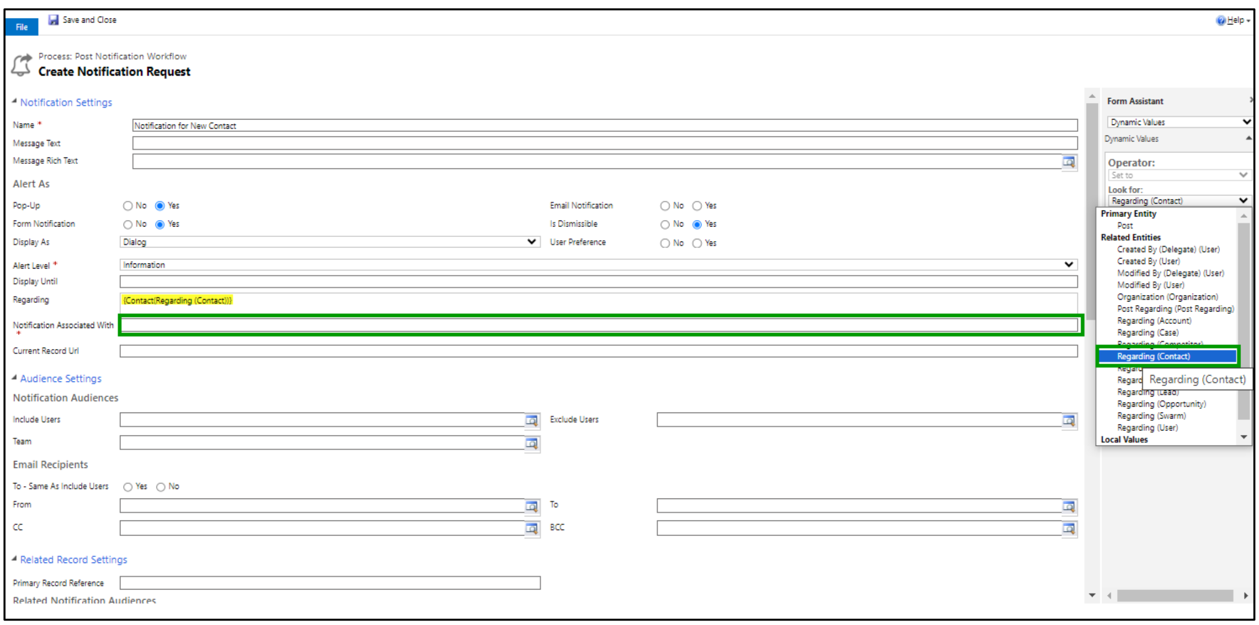
- Select **'Regarding (Contact)'** and **'Contact'** from the '**Look for'** field**.**



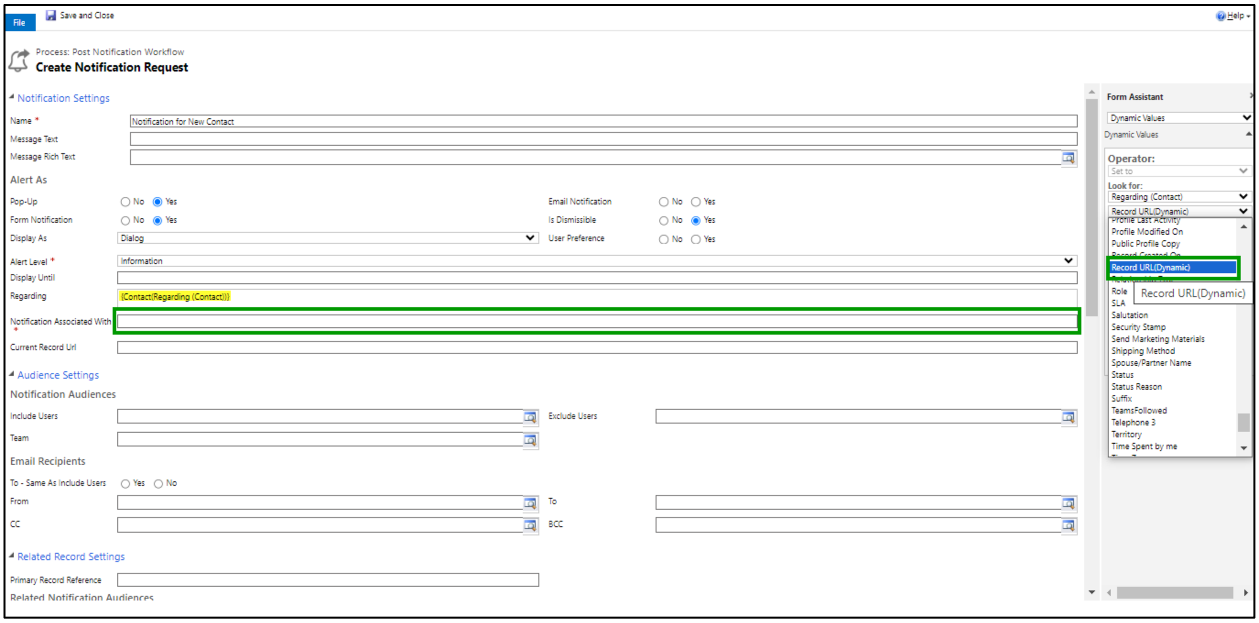
- Click on **'Add'** button and then **'OK'** to add it to the Regarding field.



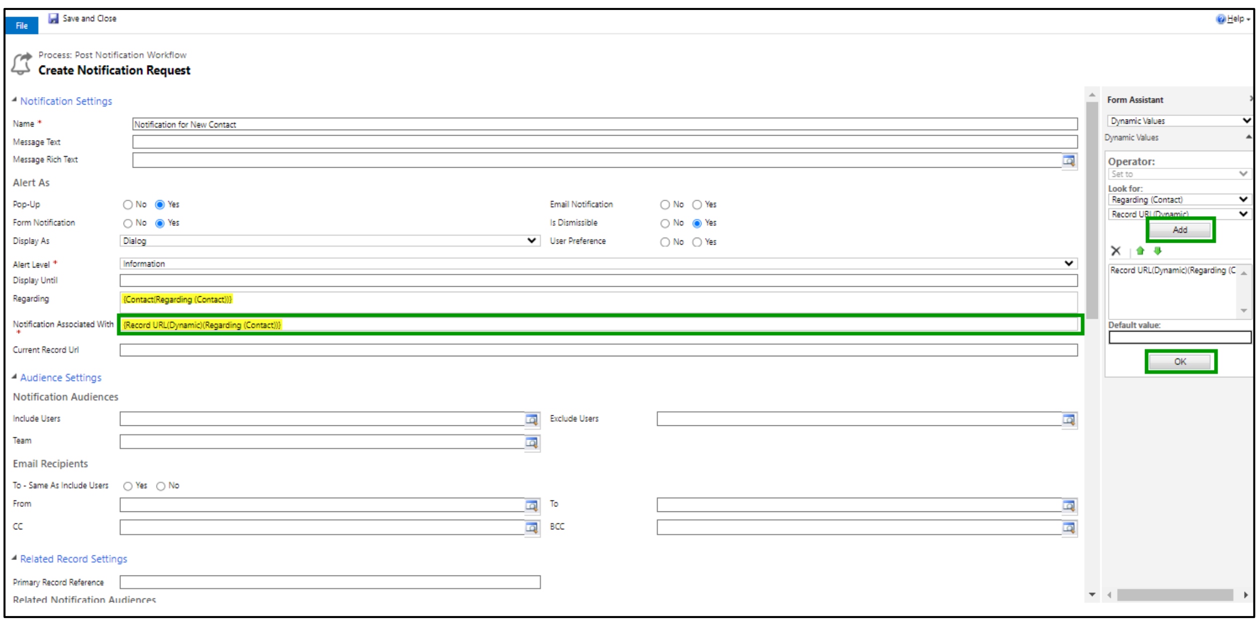
- Select **'Regarding(Contact)'** from the '**Look for'** field.



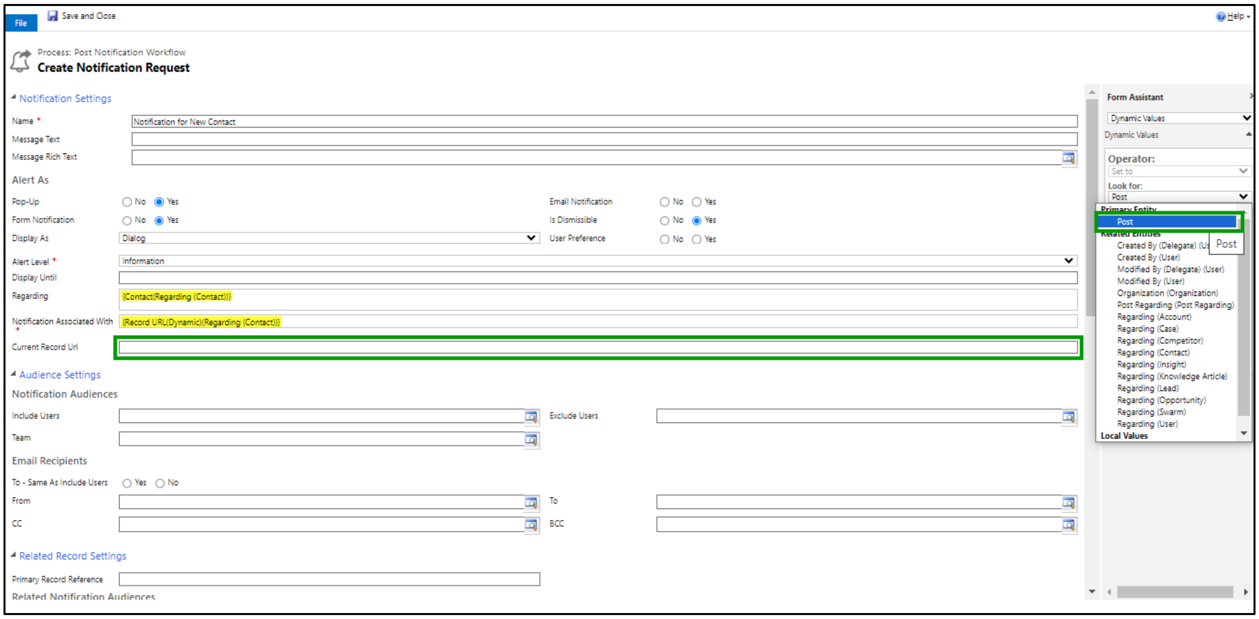
- Select **'Record URL (Dynamic)'.**



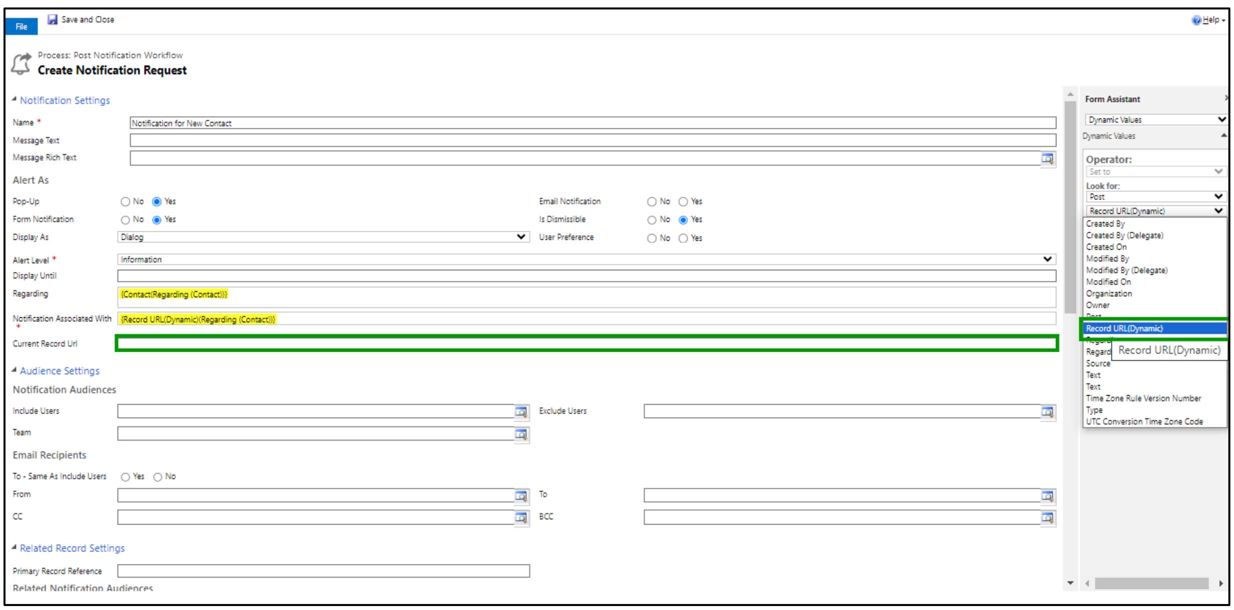
- Click on **'Add'** button and then **'OK'** to add it to the **'Notification Associated With'** field.



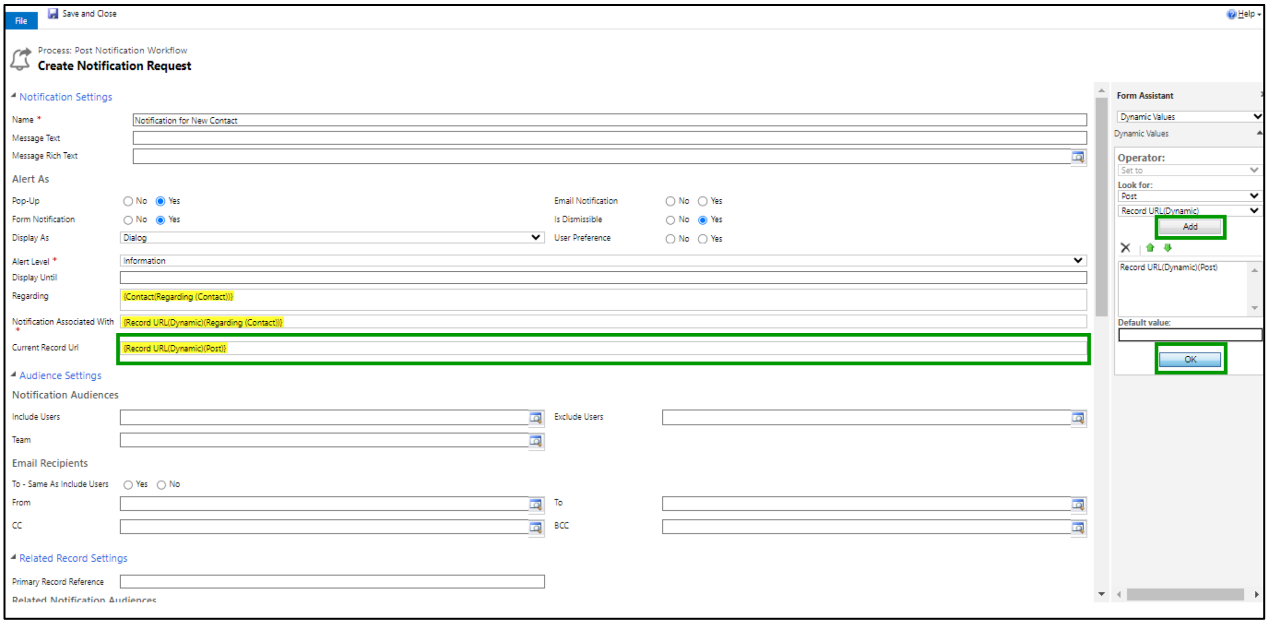
- Now to fill out the **'Current Record Url'** field, go to the Look for field and select **'Post'** entity.



- And then select ‘**Record URL (Dynamic)**’.

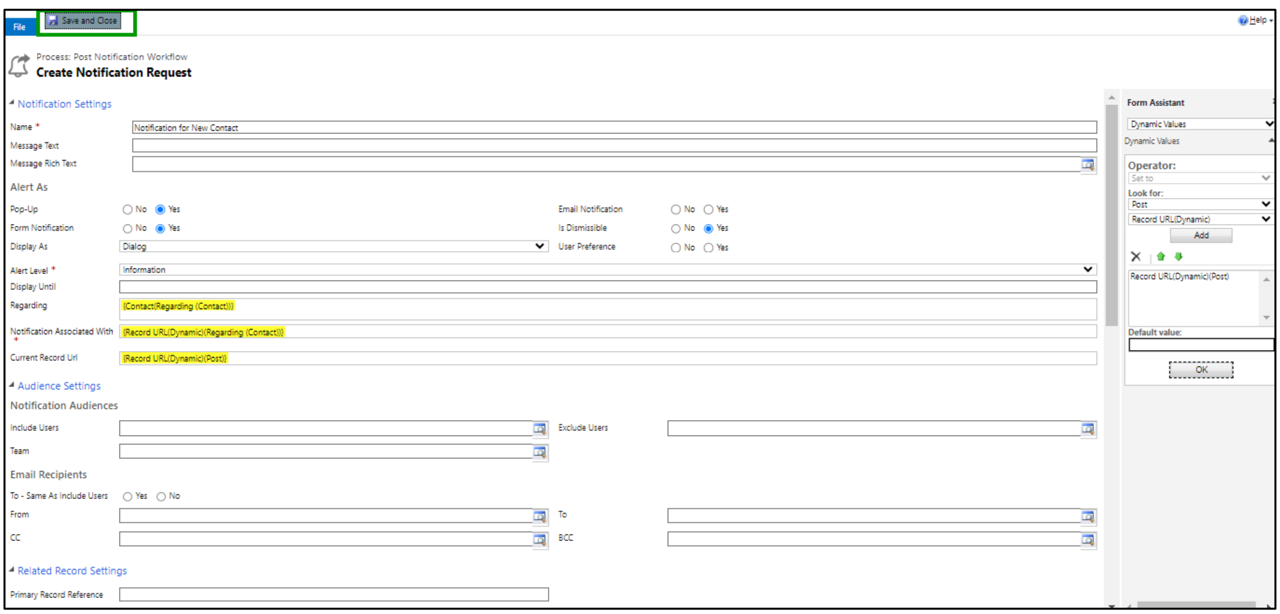


- Click on **‘Add’** button and then **‘OK’** to add selected options in the **‘Current Record Url’** field.

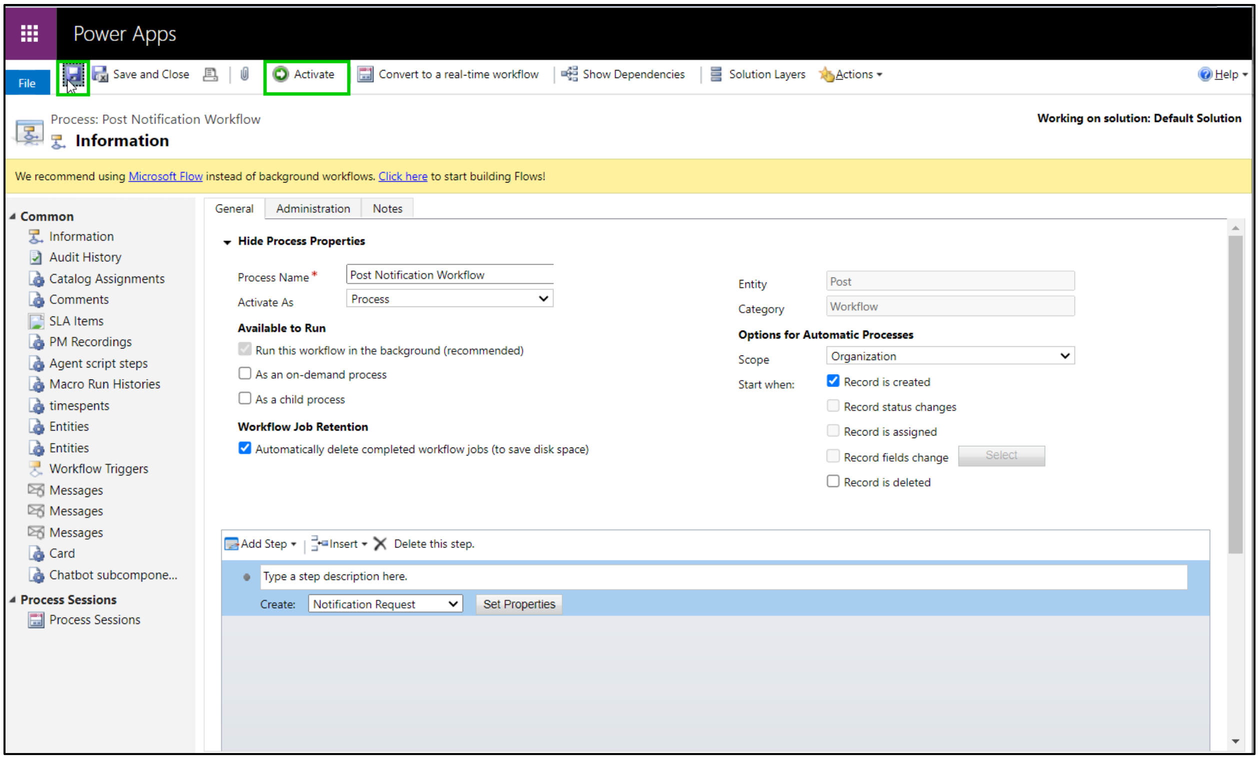


Note: Current Record URL field is a unique field only for post notification workflow.

- Click on **'Save and Close'**.



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



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:

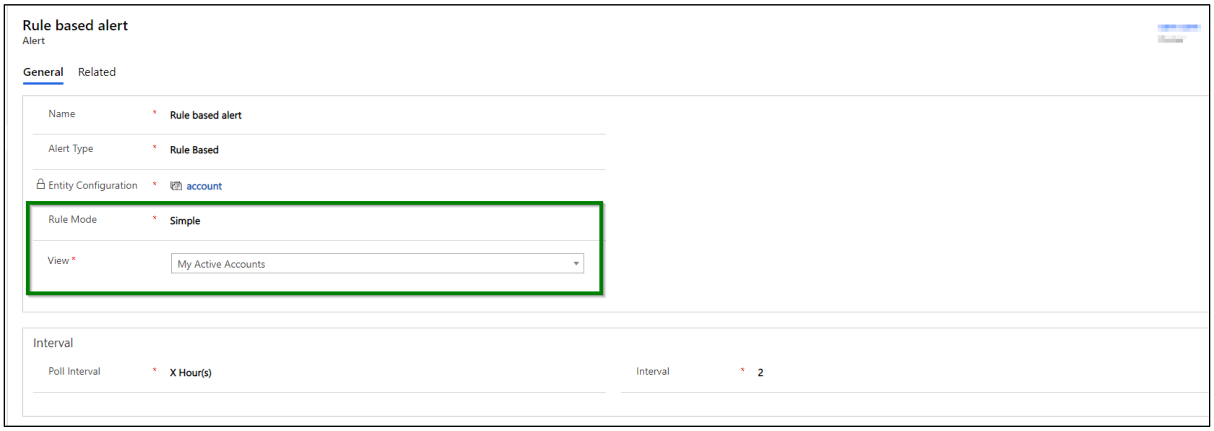
- **Rule-based Alerts**
- **Even-based Alerts**

Rule-based Alert:

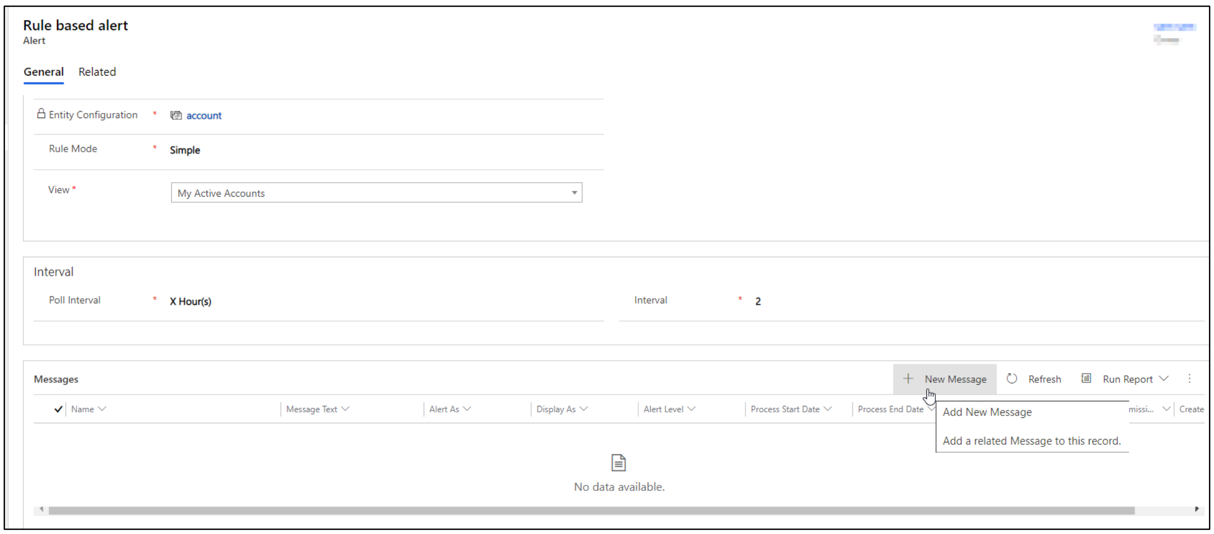
Let's consider a scenario where user wants an alert to auto dismiss once the account record moves out of **'My Active Accounts'** entity view.

Steps to Auto-dismiss Alerts

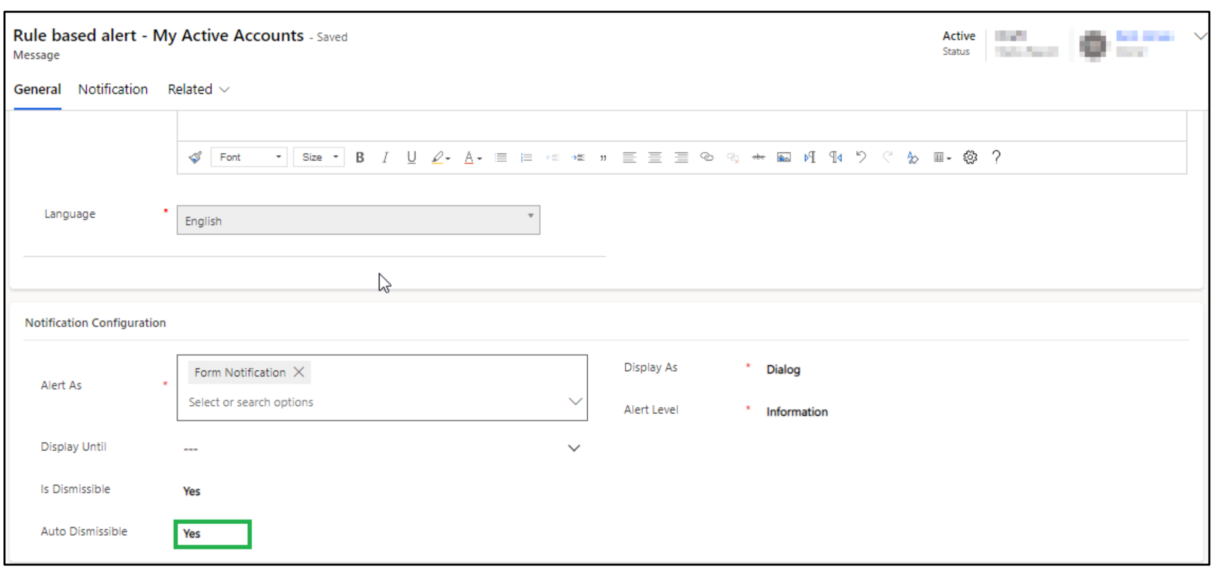
1) Create a new alert of type **'Rule Based'** and define the rule mode as **'Simple'** with a view as '**My Active Accounts'.**



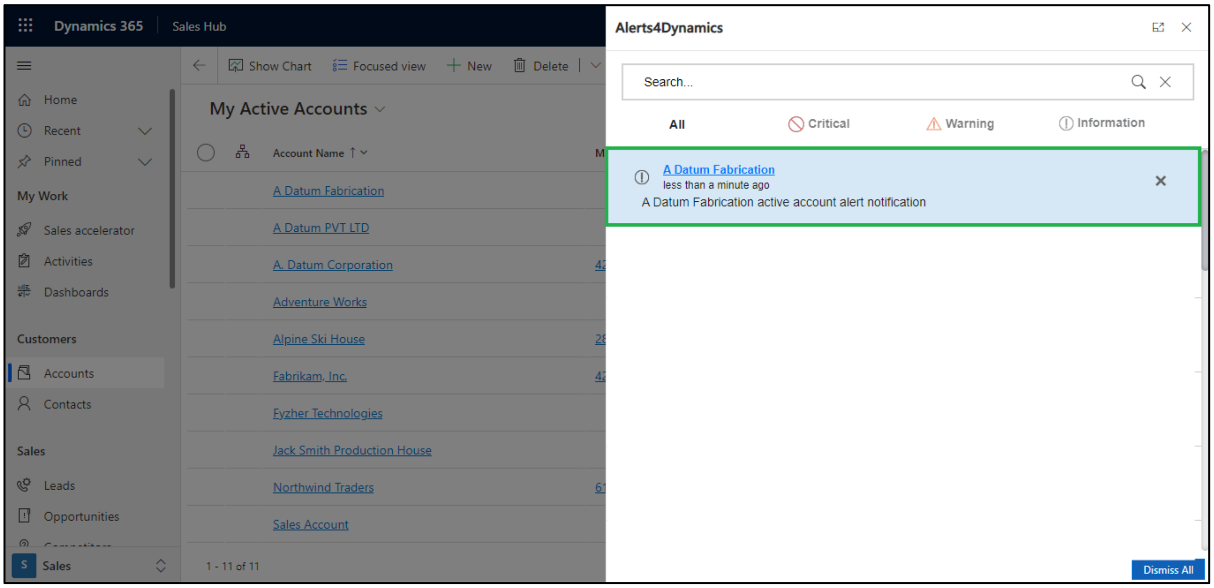
2) Add a message to this alert.



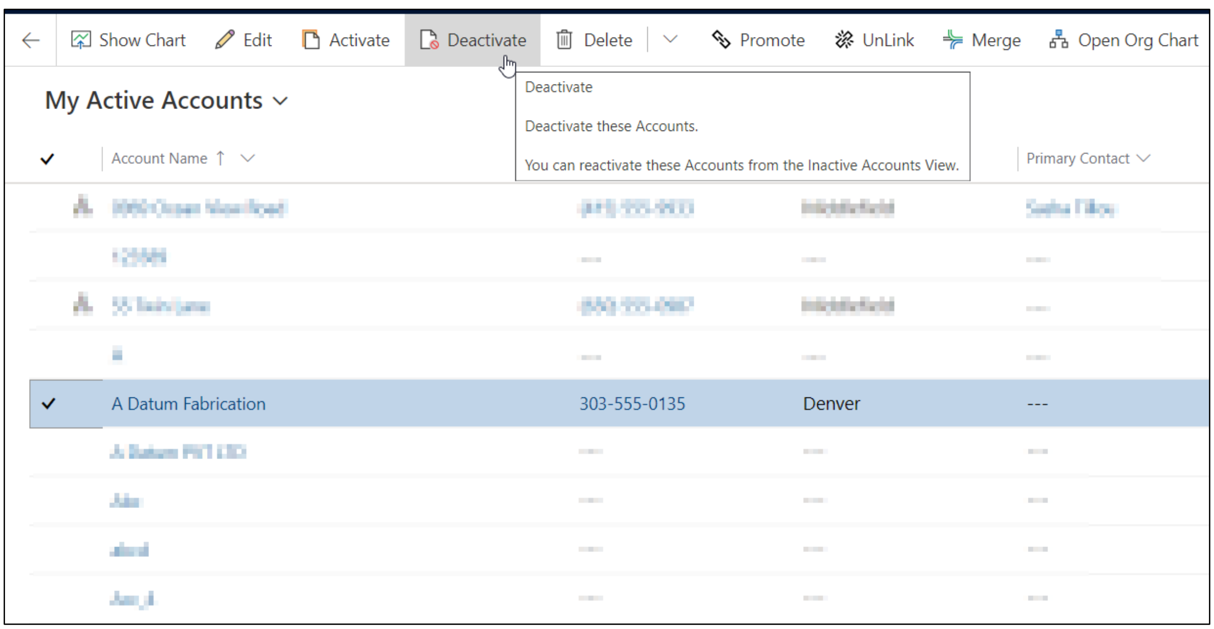
3) Set **'Auto Dismissible'** as **'Yes'**.

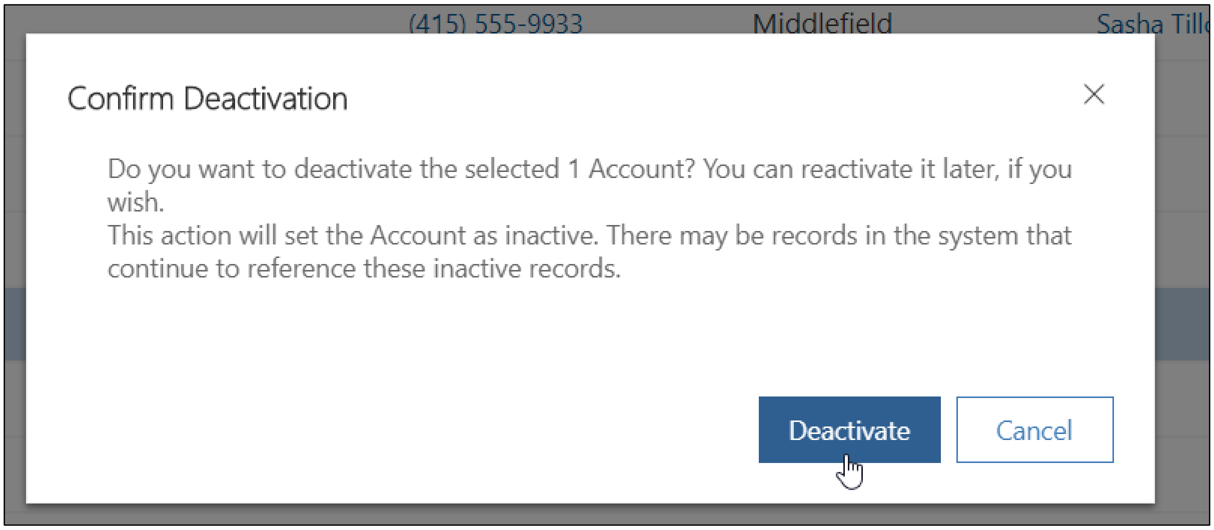


4) Navigate to **Accounts → My Active Accounts → Open any record**. Here, an alert will be displayed as a Form dialog post opening the record and it will continue showing up as long as it satisfies the rule defined in the alert configuration i. e. **'My Active Accounts'**.

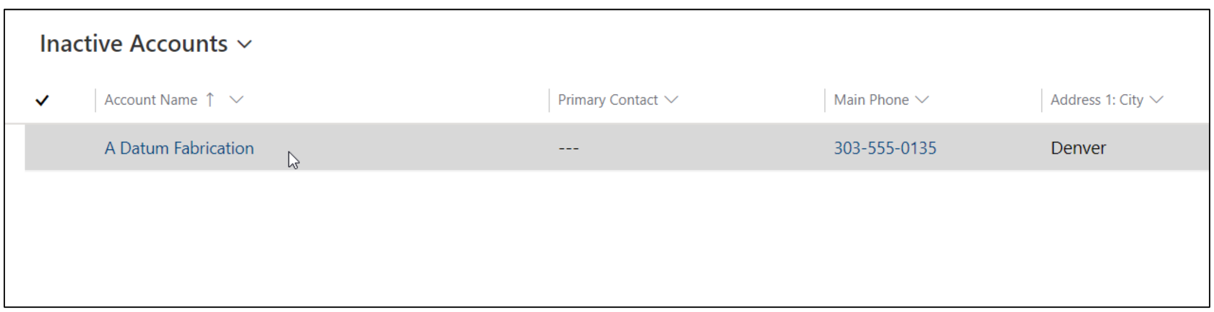


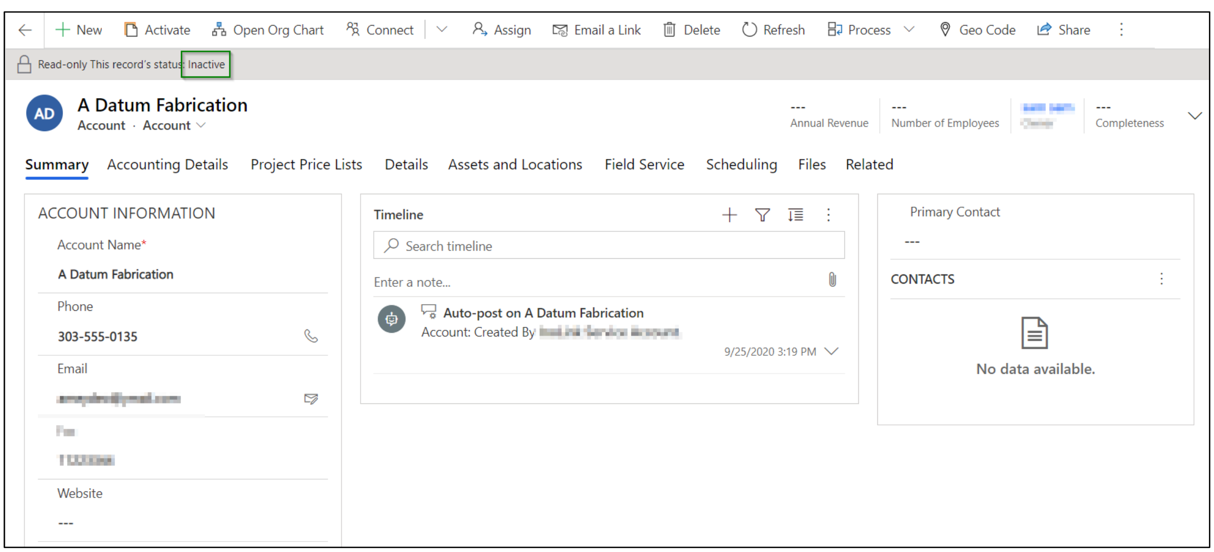
5) Now deactivate this account record so that it will move out of **'My Active Accounts'** entity view.





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***.)



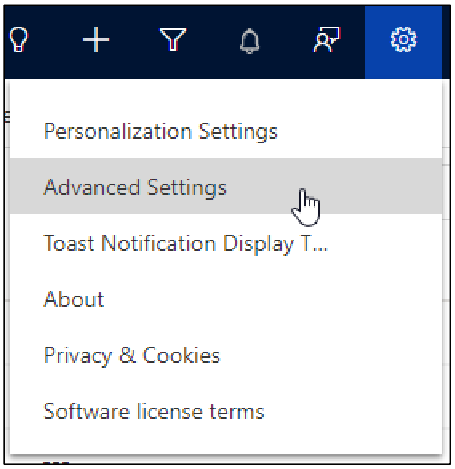


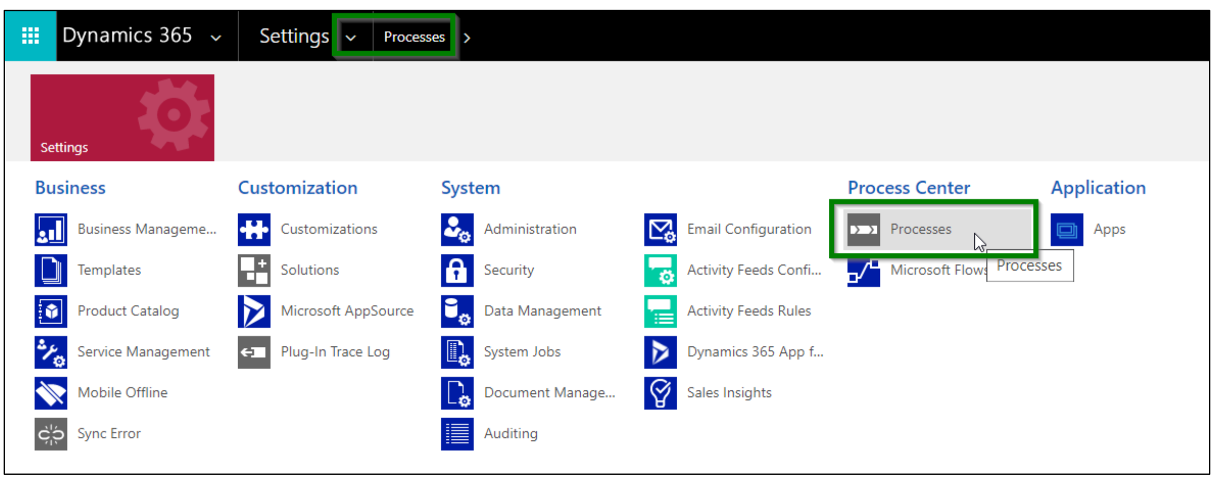
Event-based Alert:

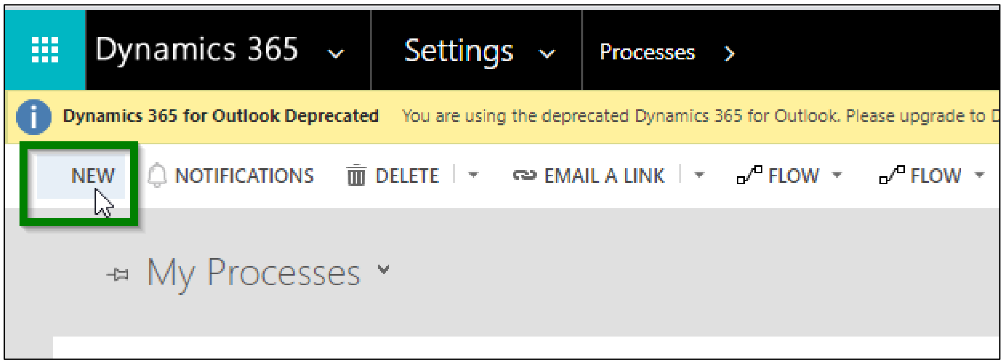
Let's consider that the user wants to create an alert notification to be shown when the value of a 'Subject' field of the case record changes. And later, user wants this alert to auto-dismiss once the case is resolved.

Steps to Auto-dismiss Alerts

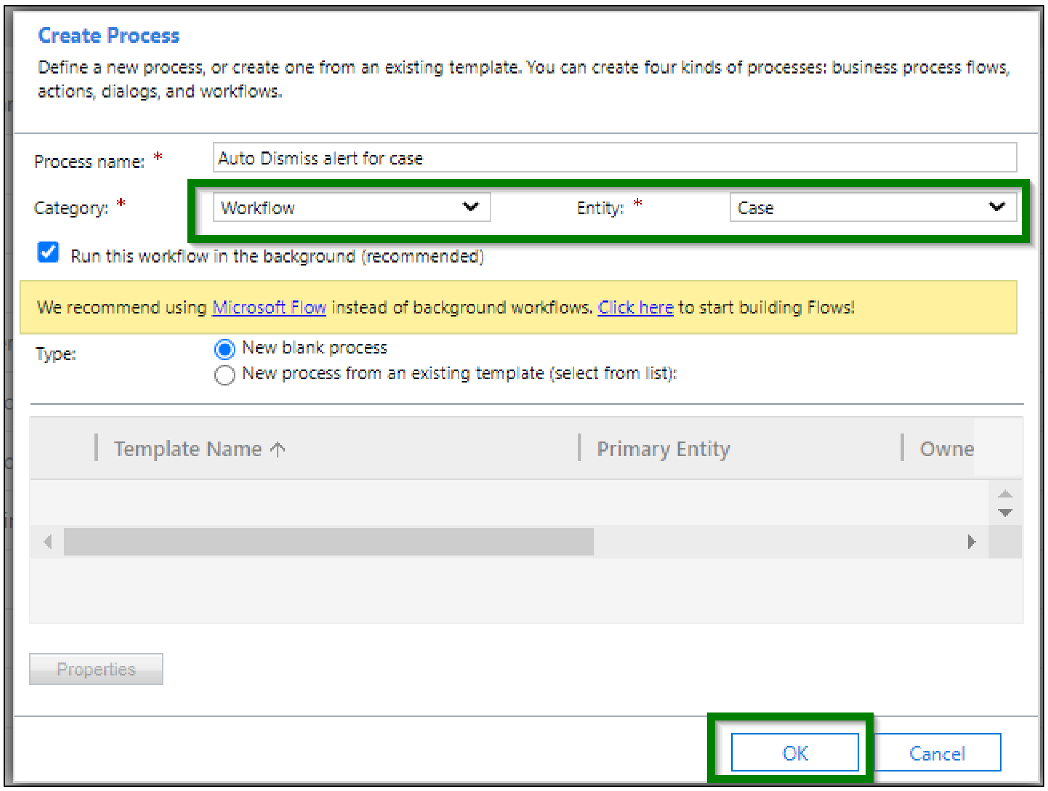
1) Navigate to **Advanced Settings →Settings →Process →New Process.**



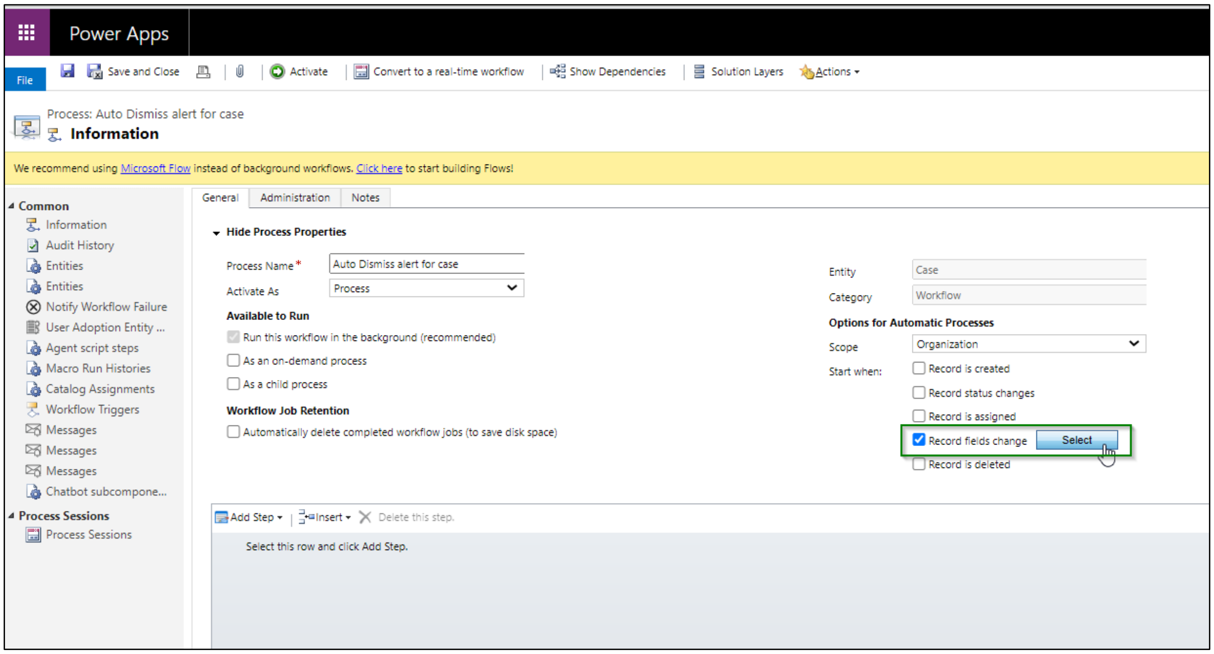


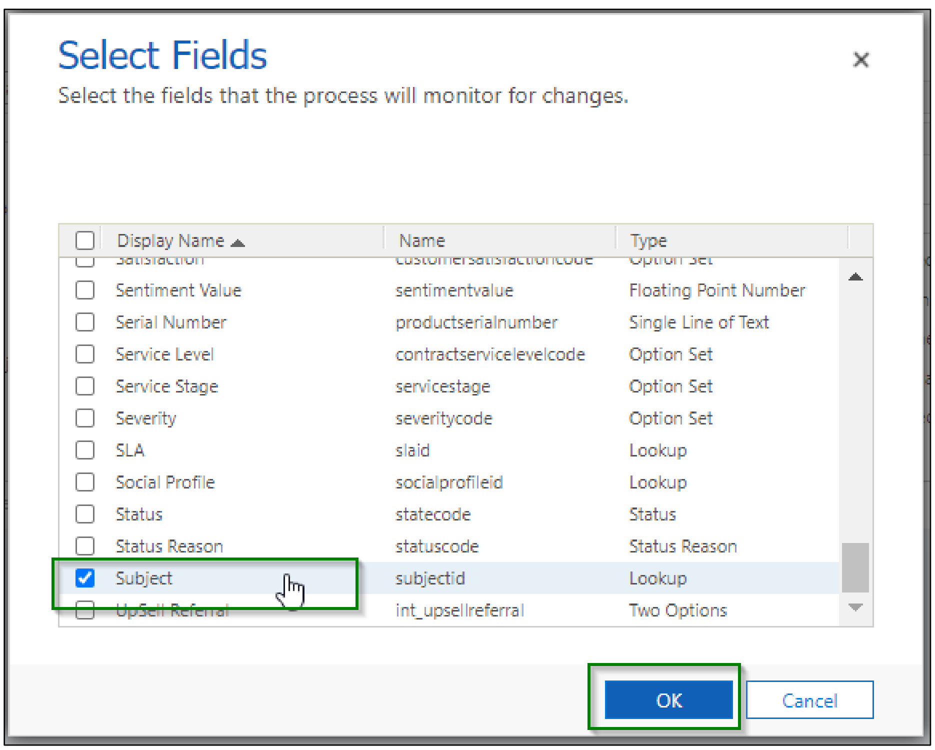


2) Select category as **'Workflow'** and choose the Entity → Click on **OK.**

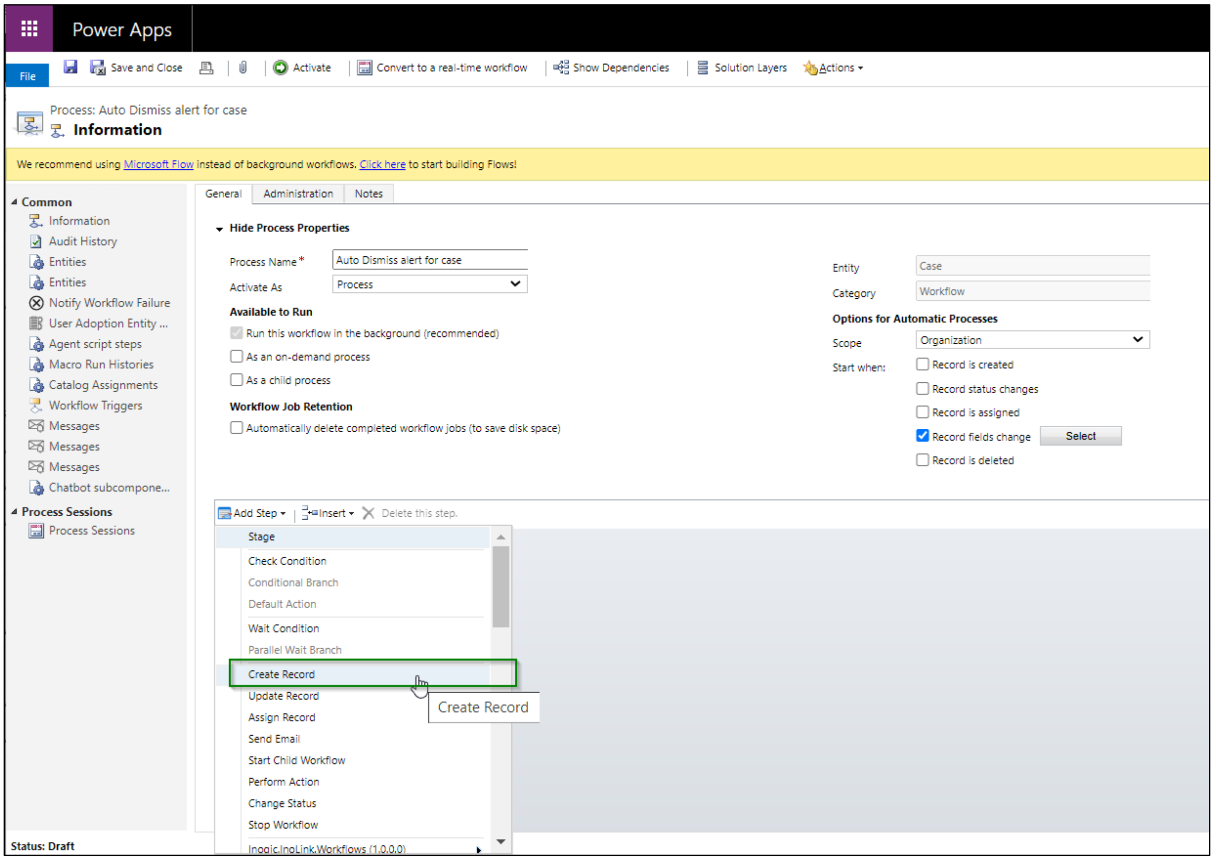


3) Go to **'Record fields change'** →Select the field **'Subject'** from the list.

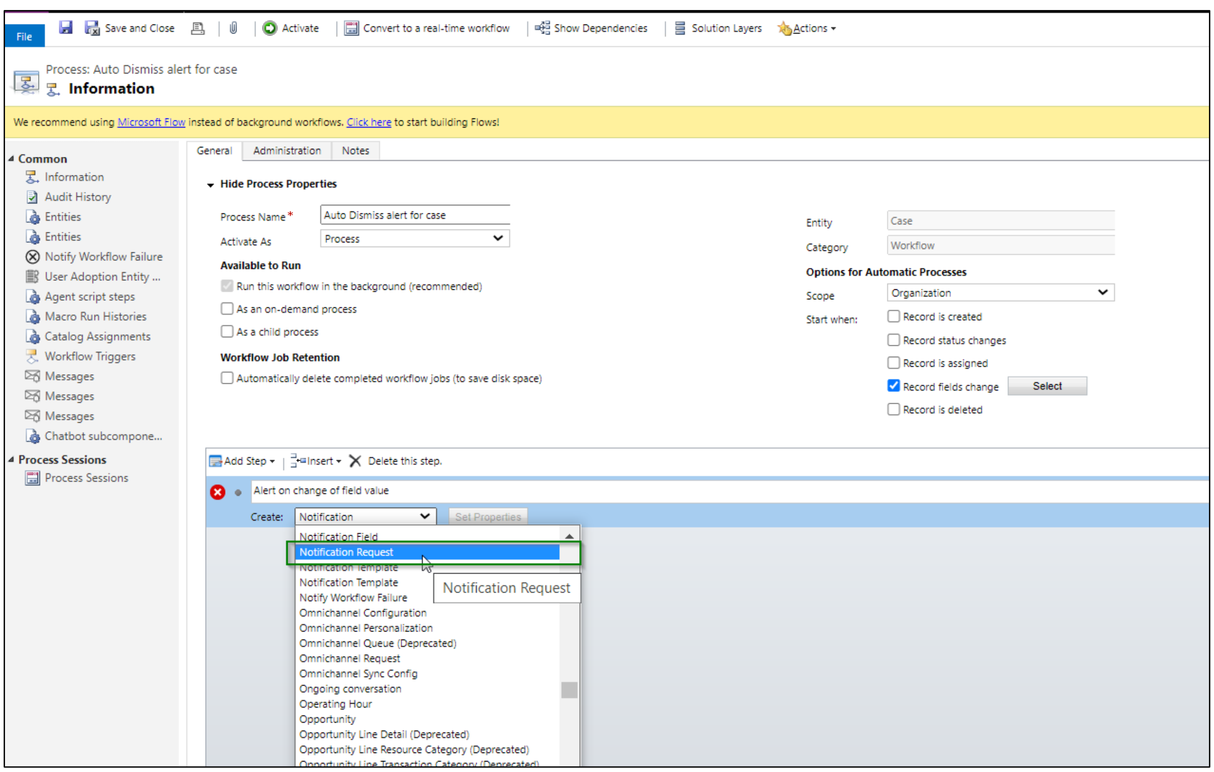




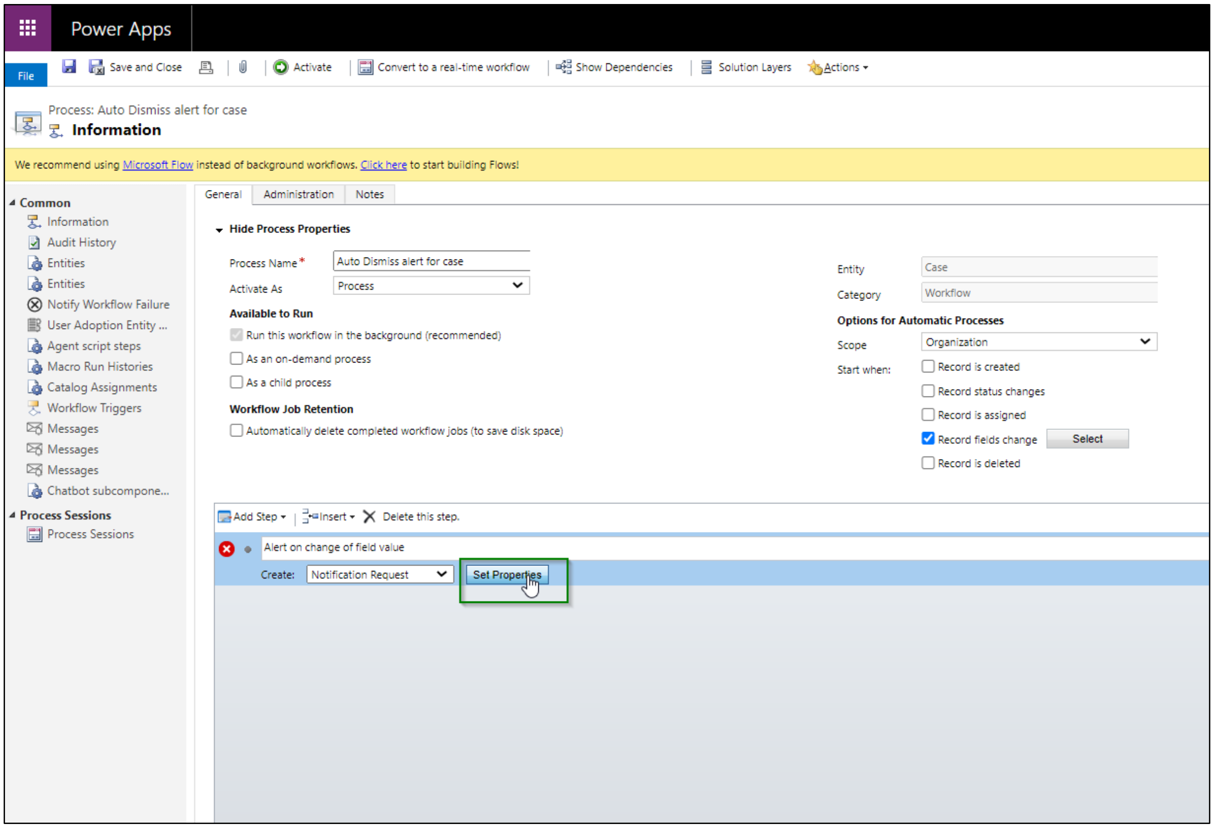
4) Create a notification request record to create an alert.



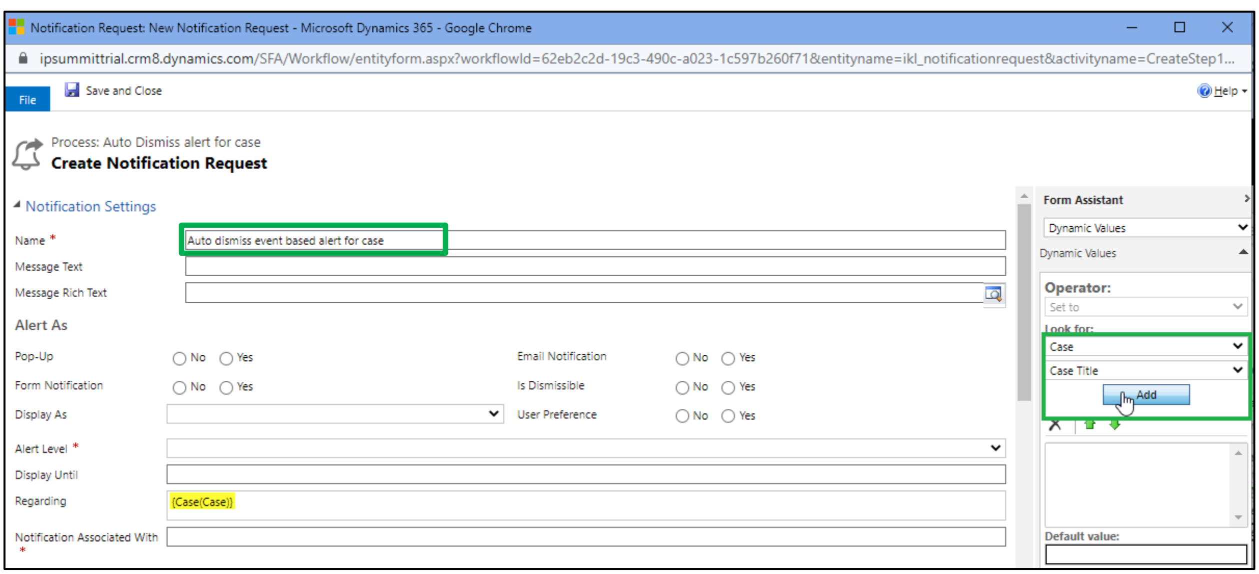
5) Select **'Notification Request'**.



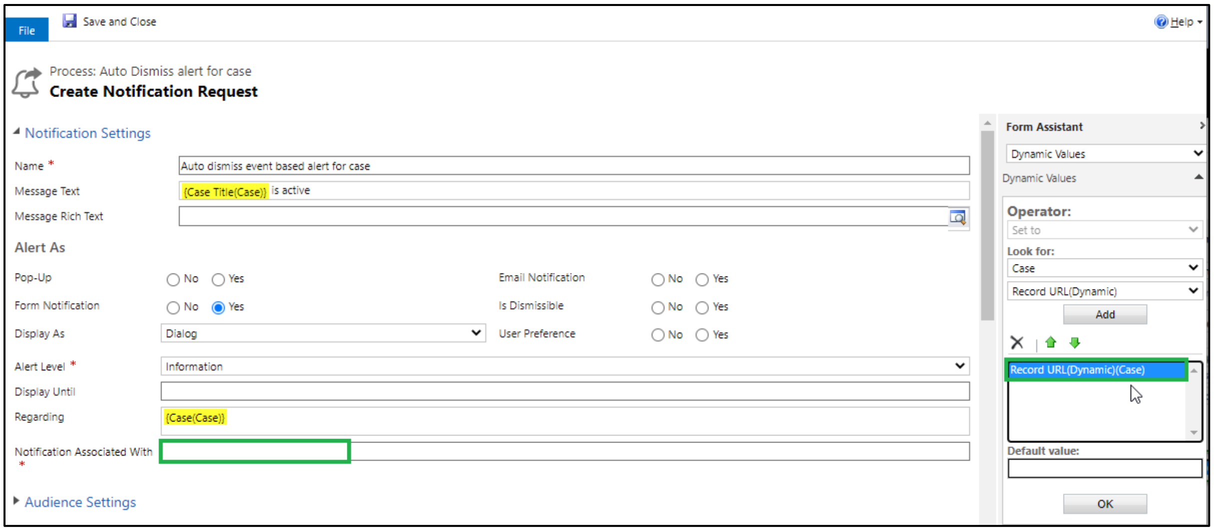
6) Click on **'Set Properties'**.

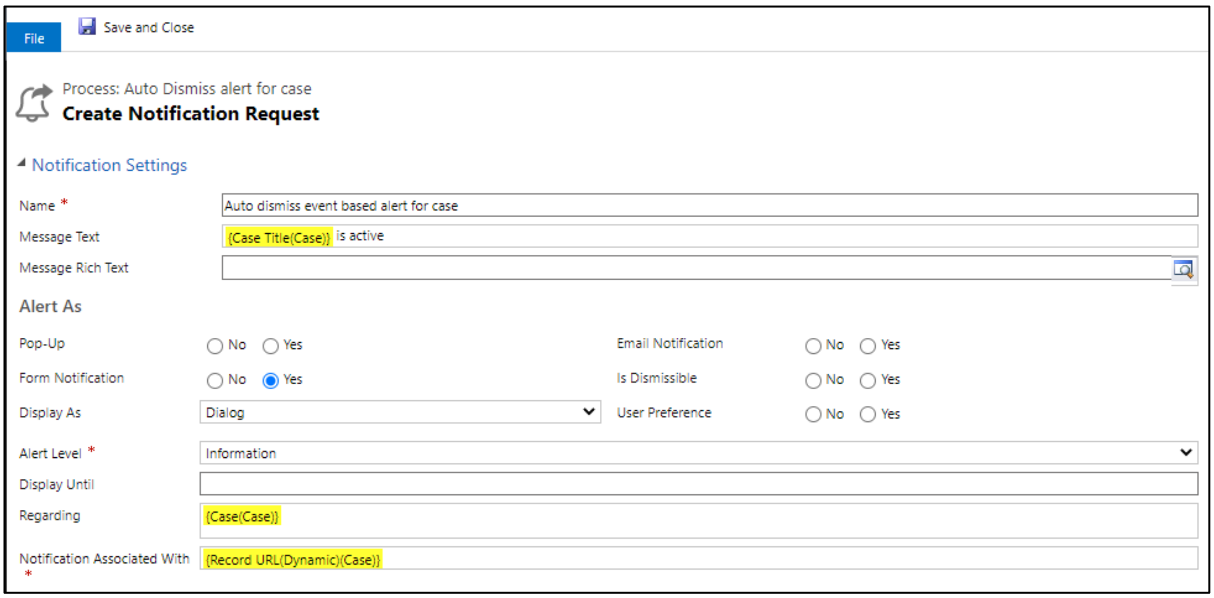


7) Perform the dynamic field selection as required.

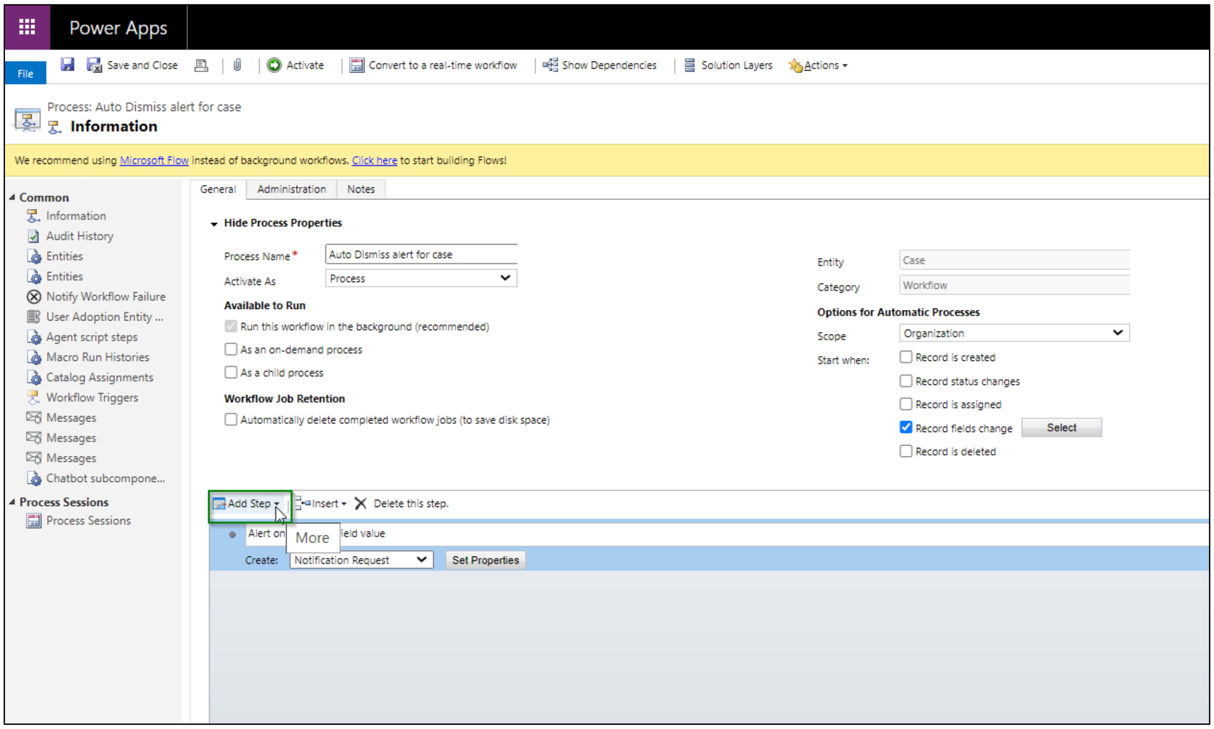


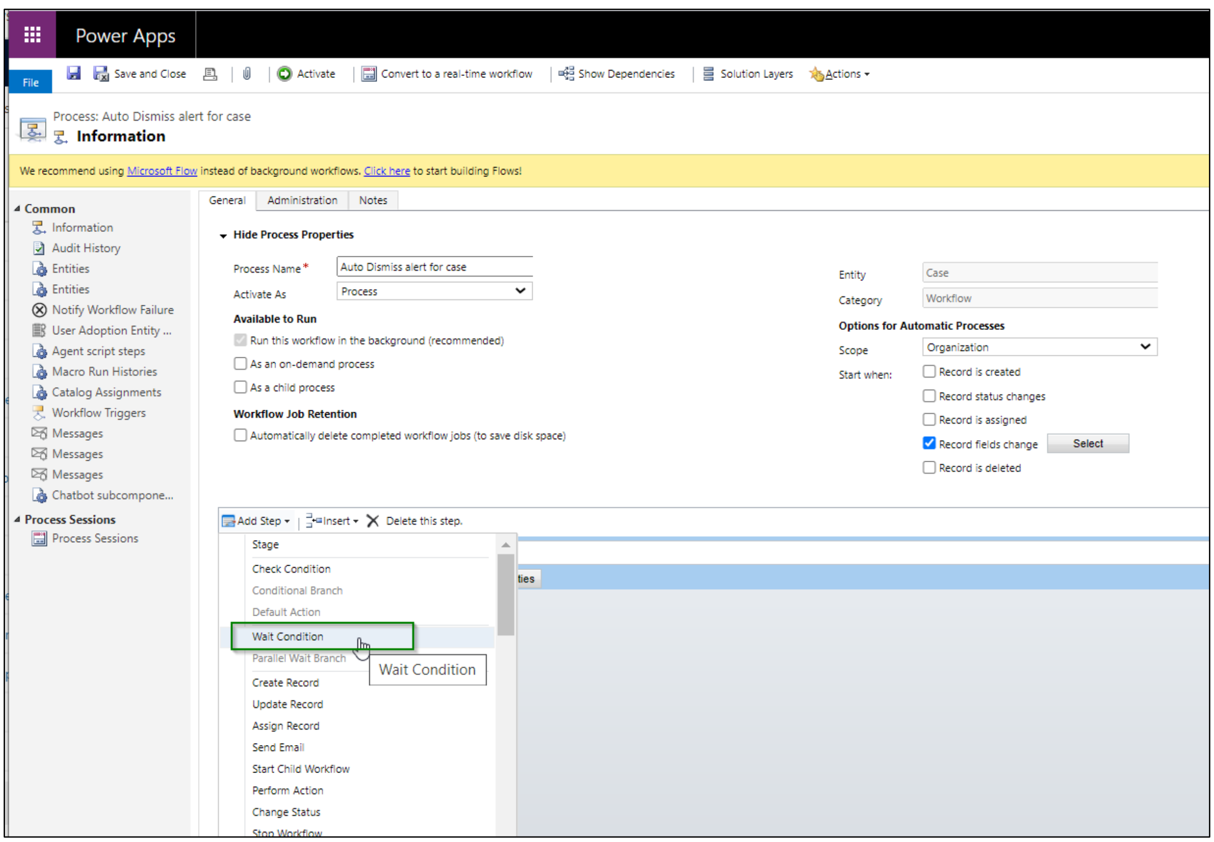
8) To display alert on the case record, set the **'Notification Associated With'** as shown below:



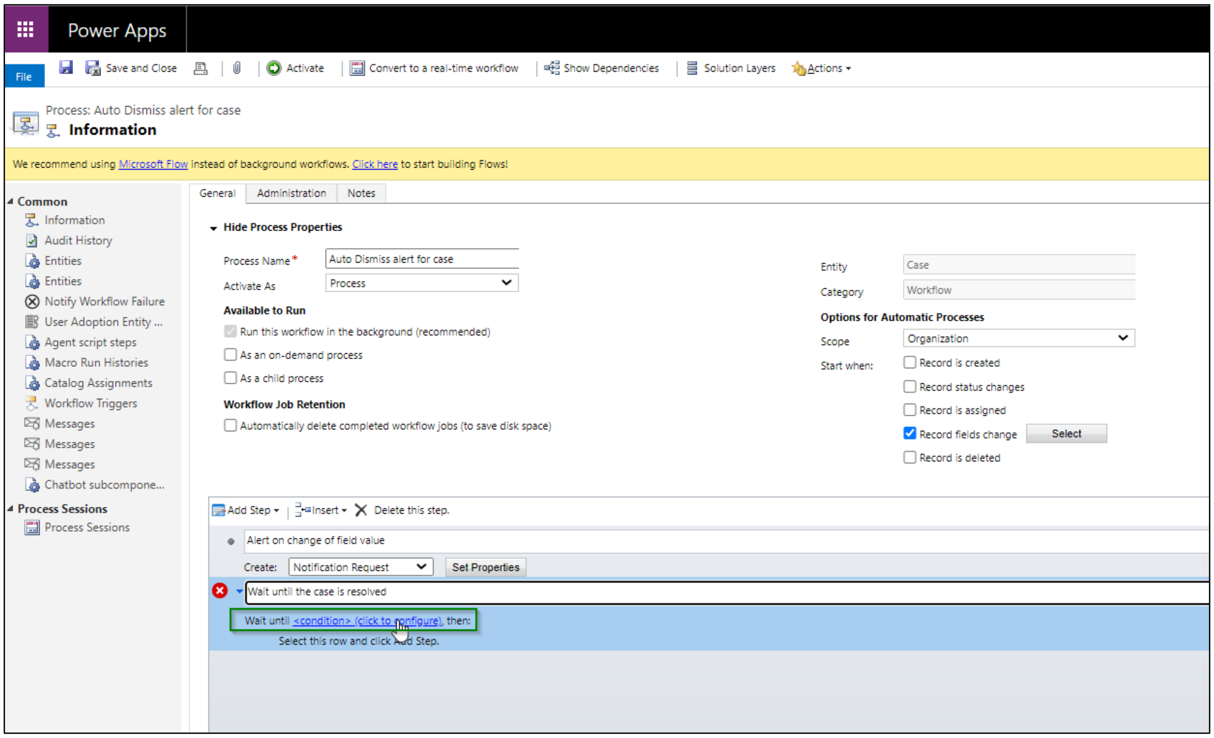


9) After creating an alert, now add a **'Wait'** condition which will wait till the case is resolved.

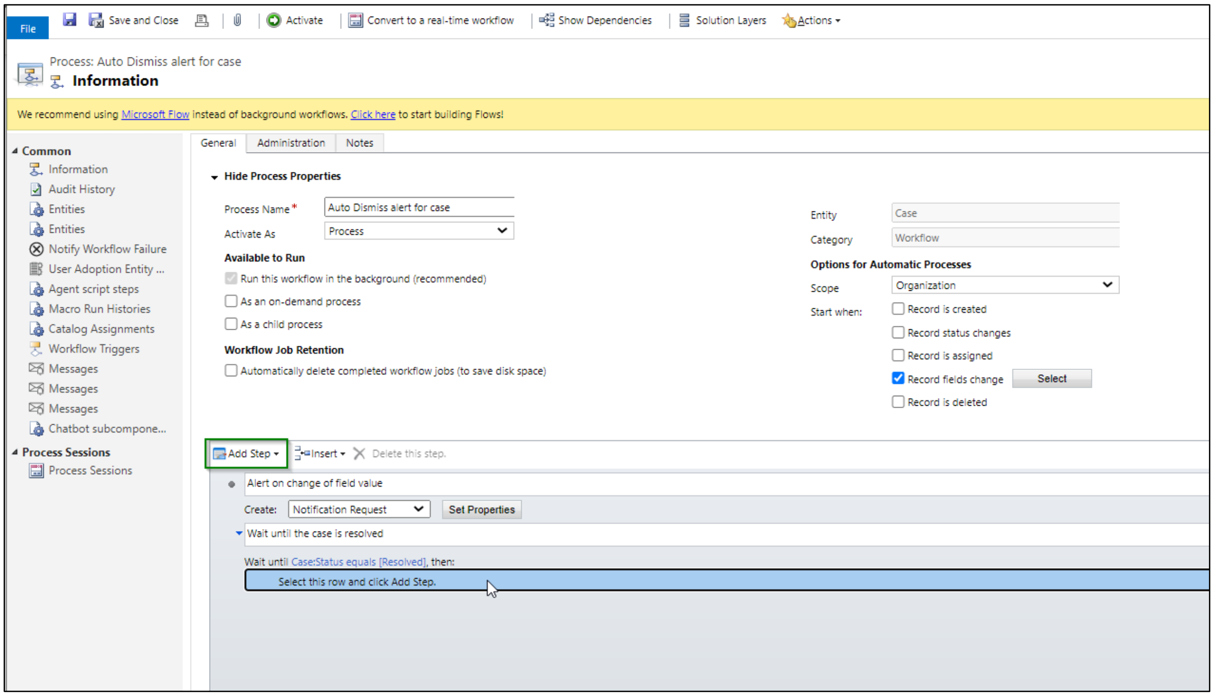




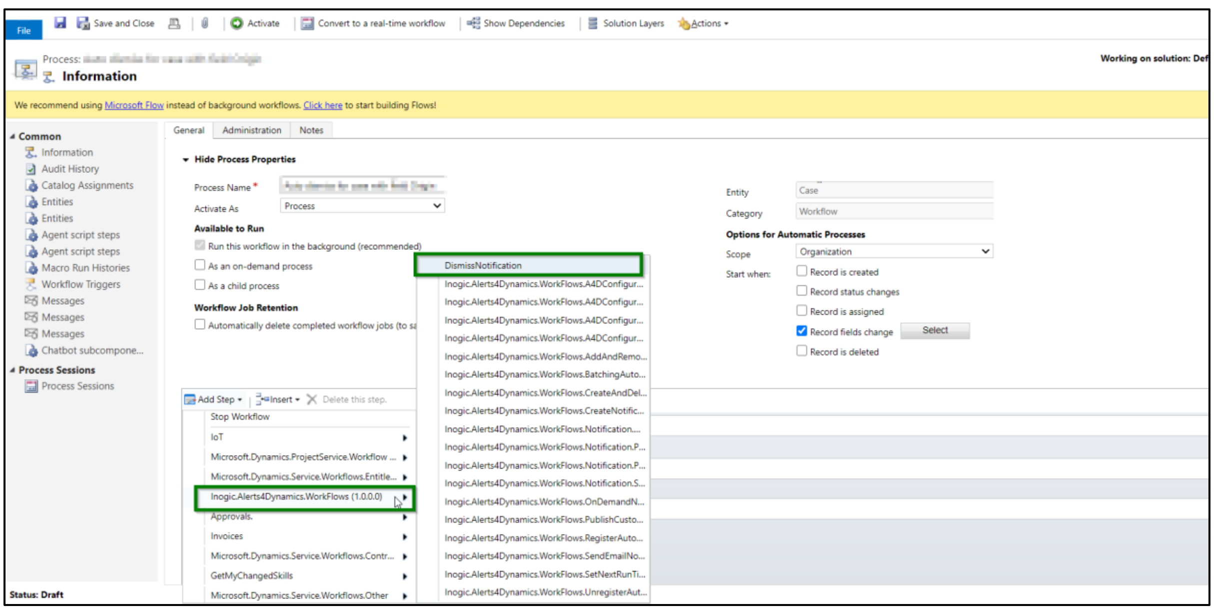
Let’s further configure the condition.



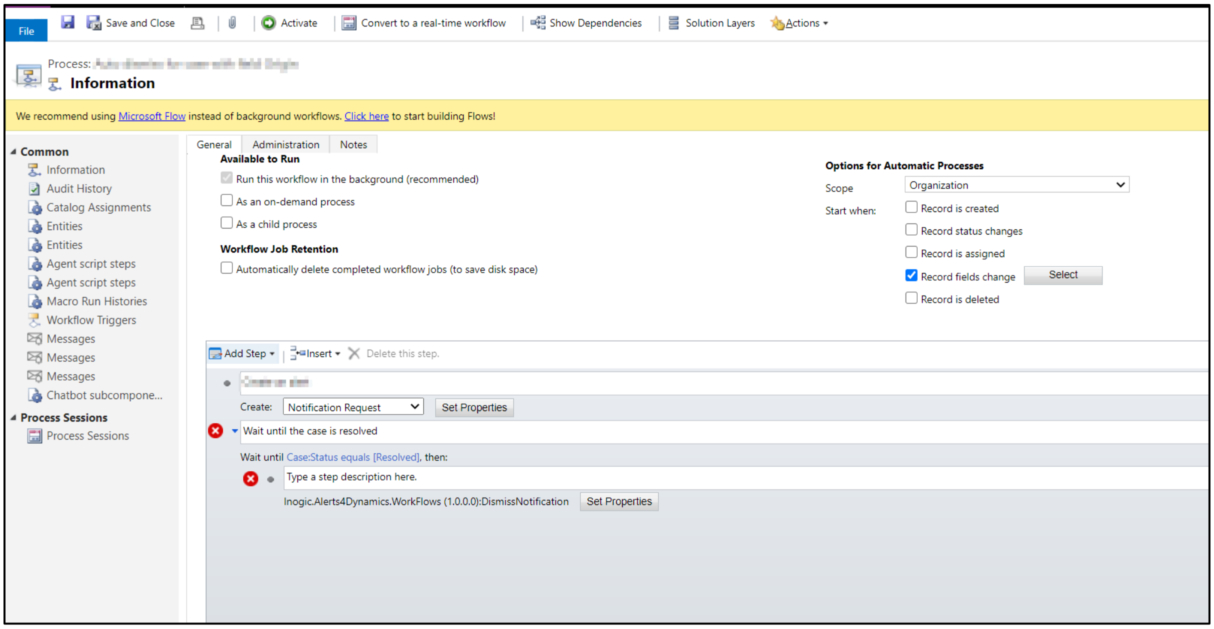
10) To auto-dismiss the alert once the case is resolved, select the row and add a new step as shown below:



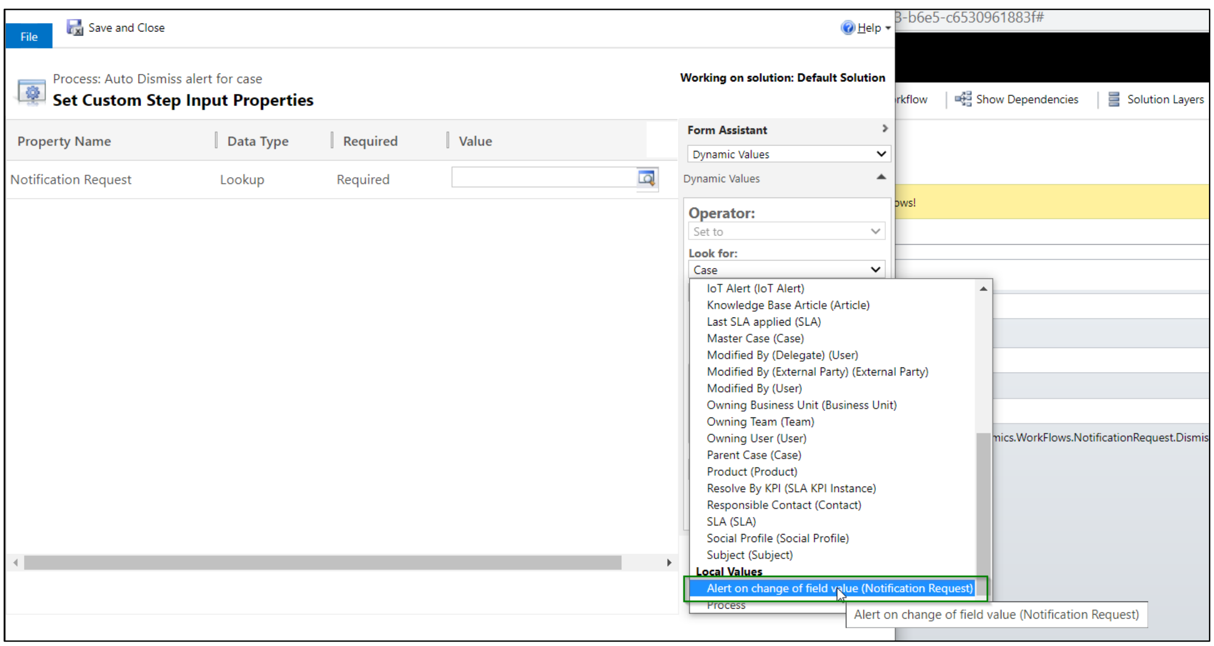
11) Select the below assembly from the list for auto dismissing the alert notification.



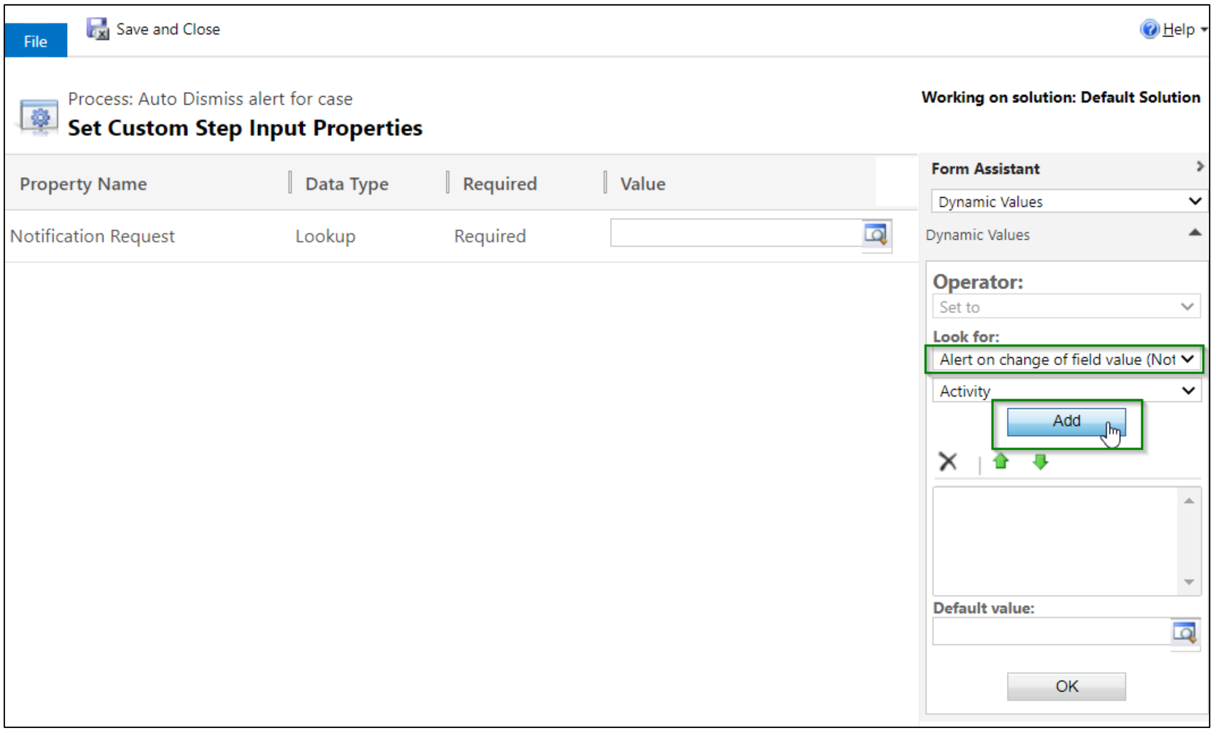
12) Click on **'Set Properties'**.



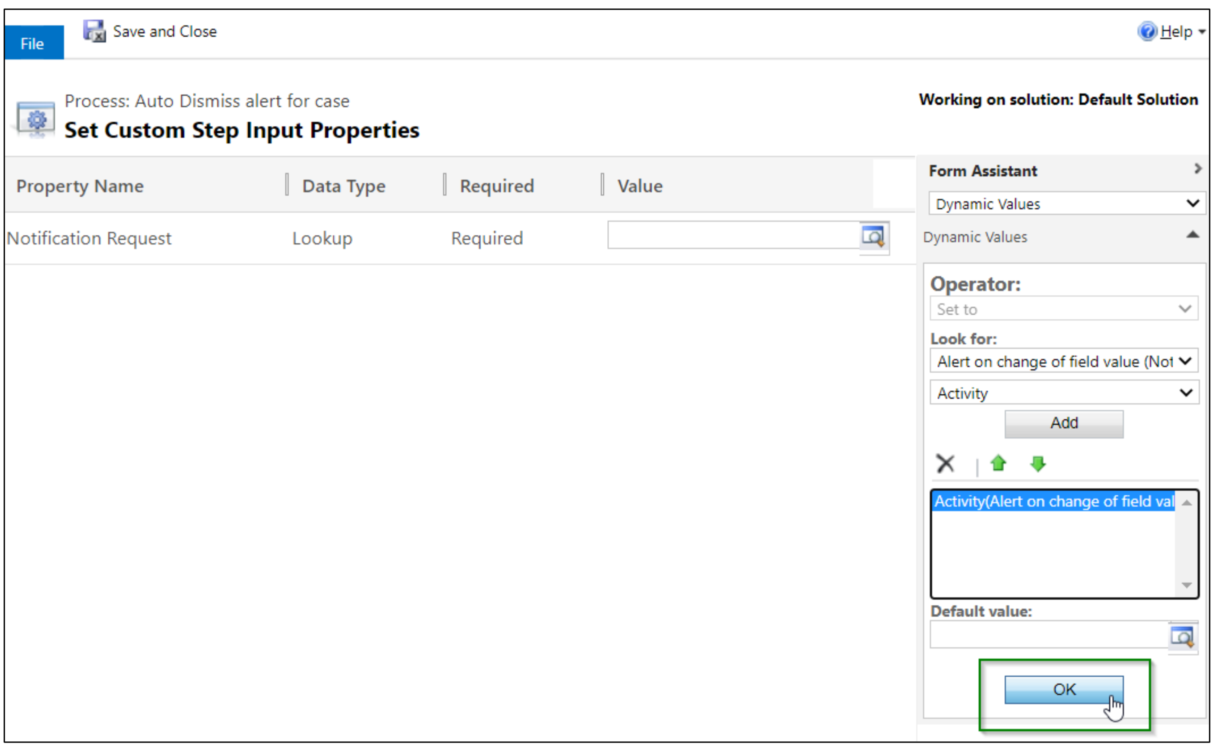
13) Select the below option from the list for **'Look for'** field. This is a first step description that was added to create a notification request record.

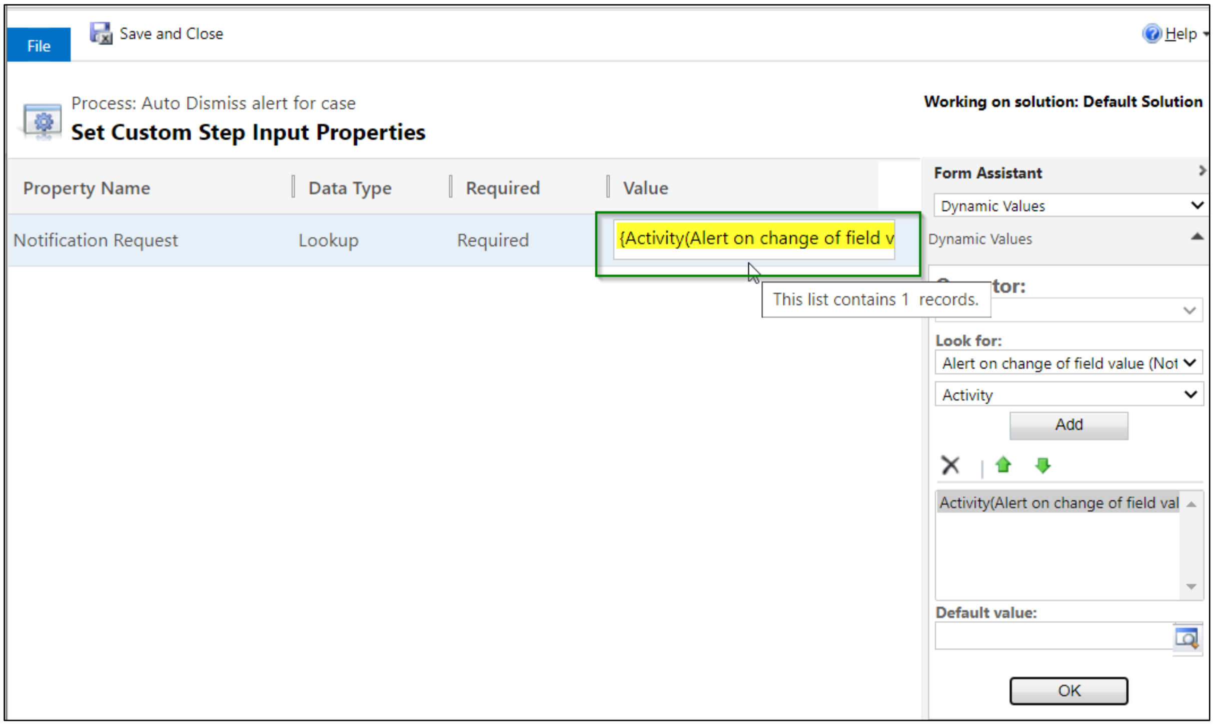


14) Click on **'Add'**.

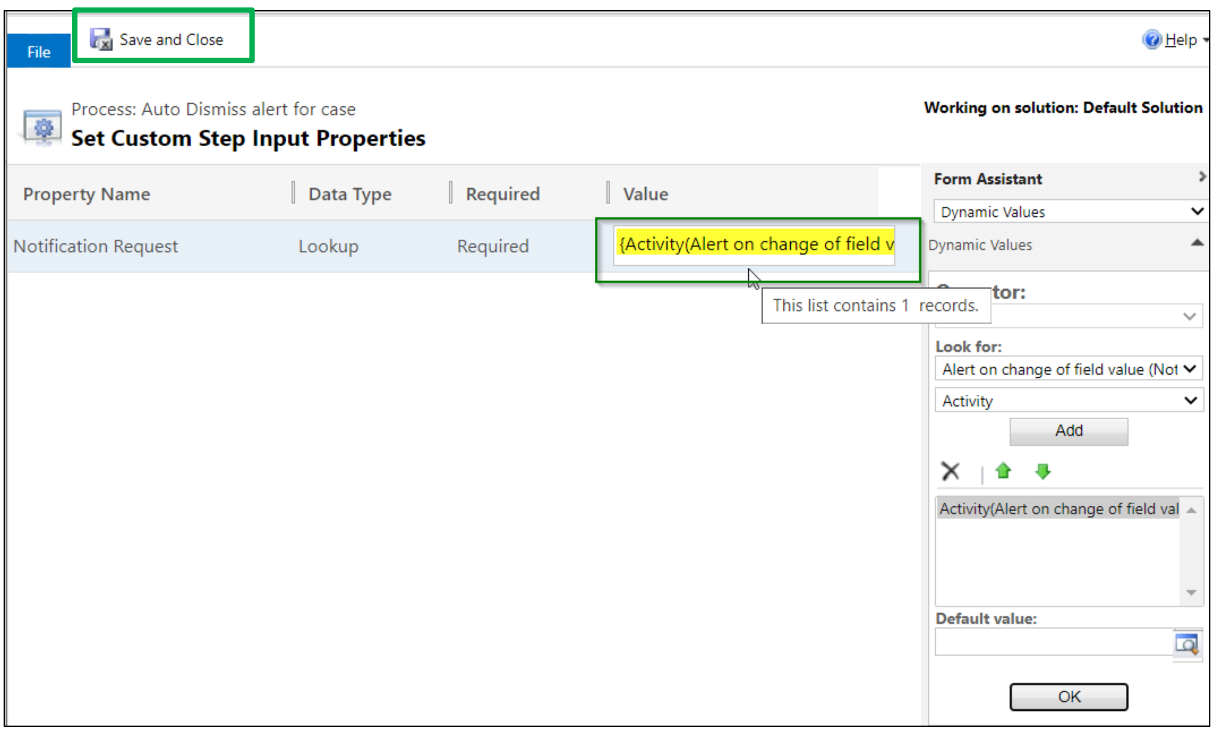


15) Click on **'OK'**.

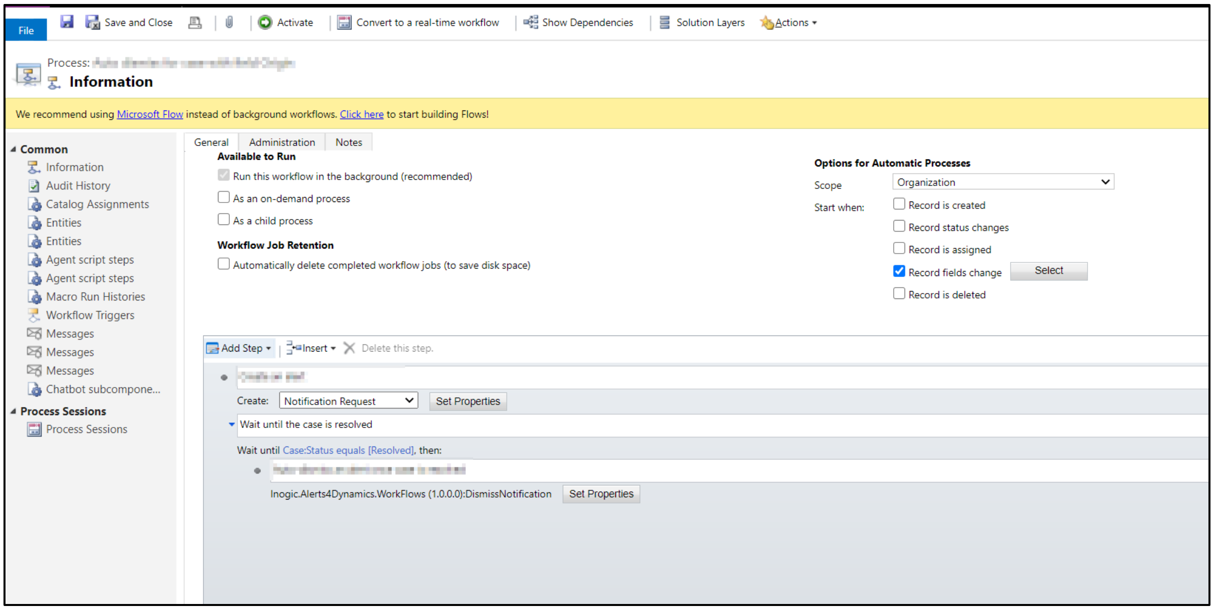


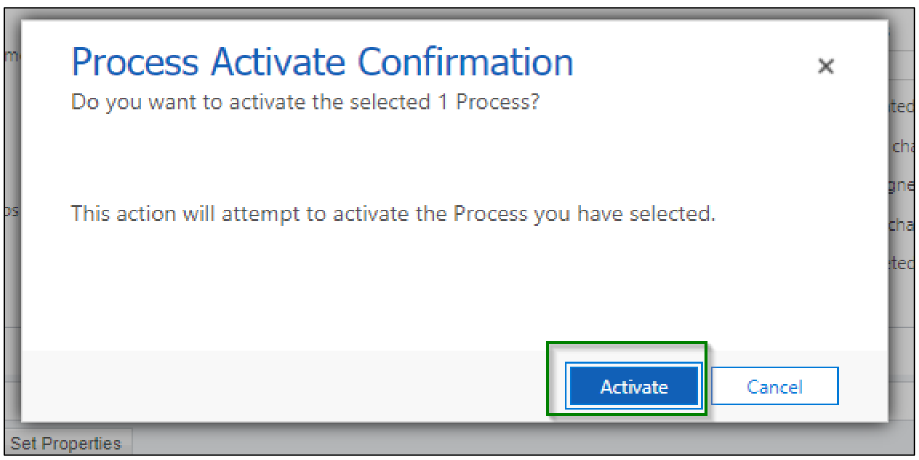


16) Click on **'Save and Close'**.

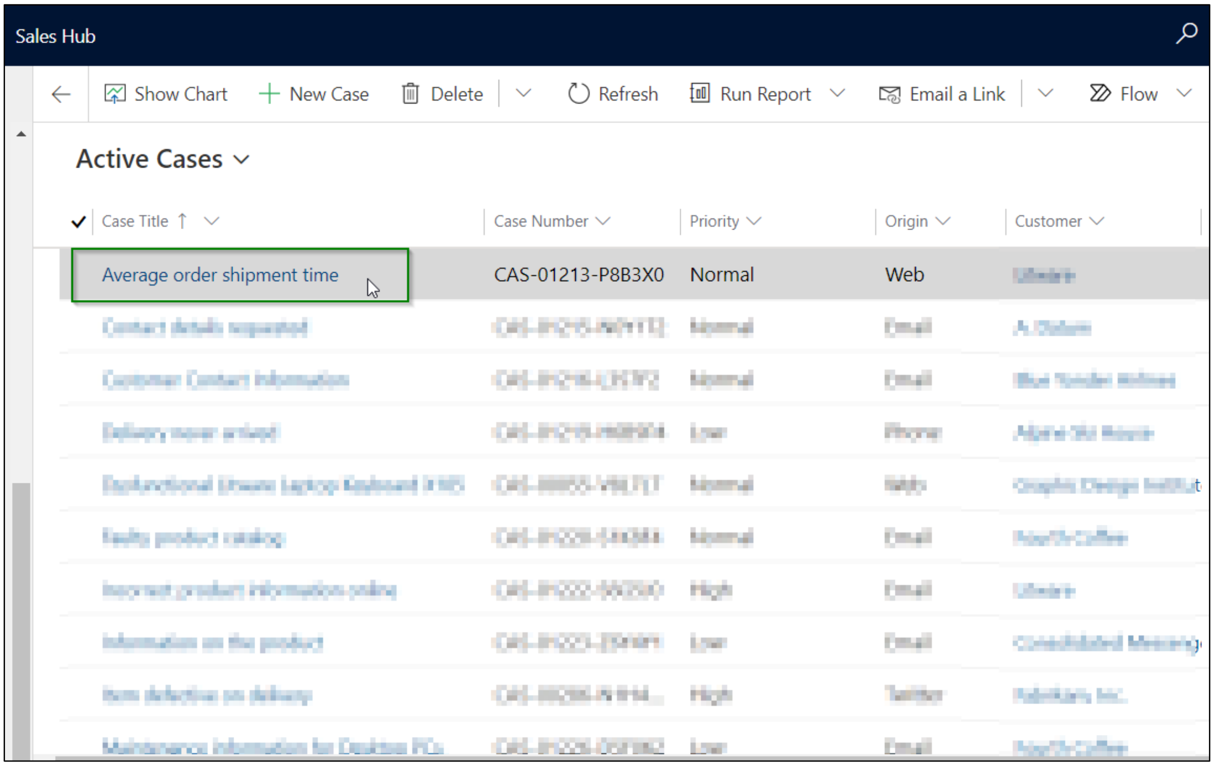


17) Next, activate the workflow.

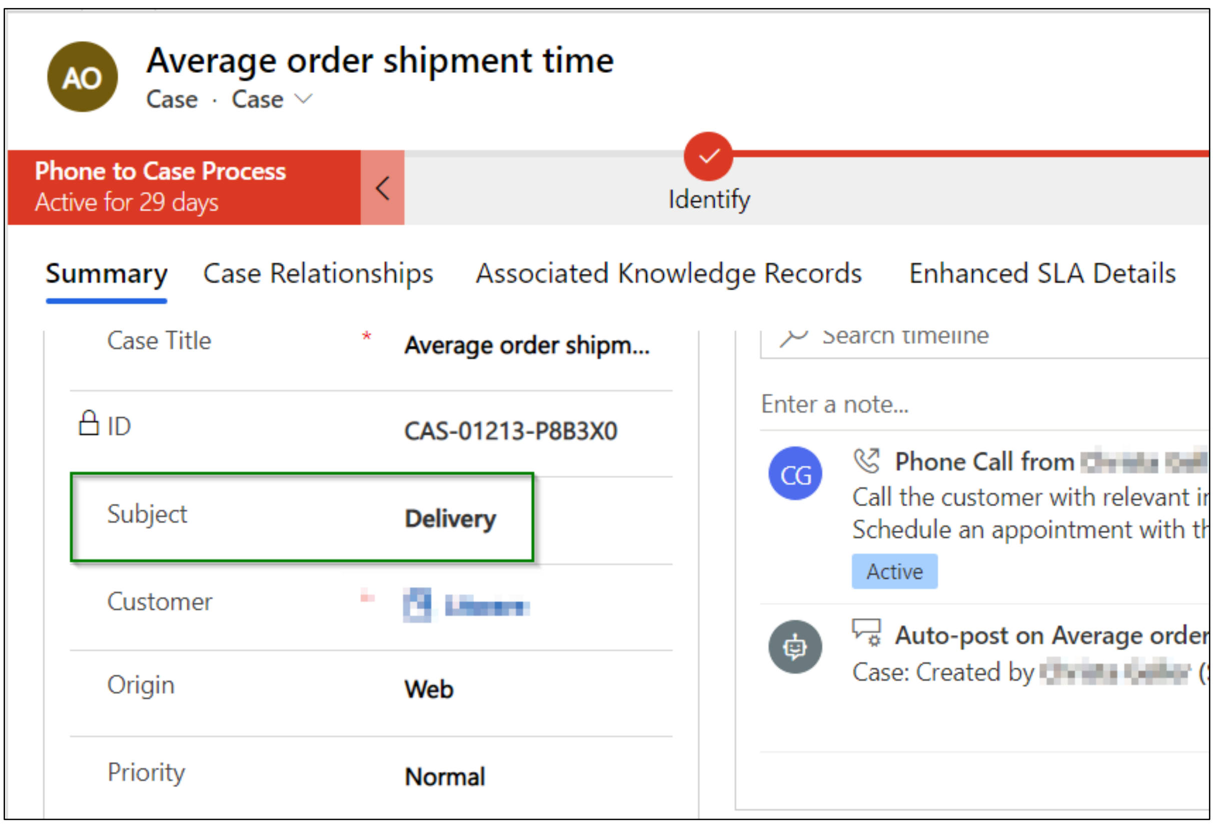


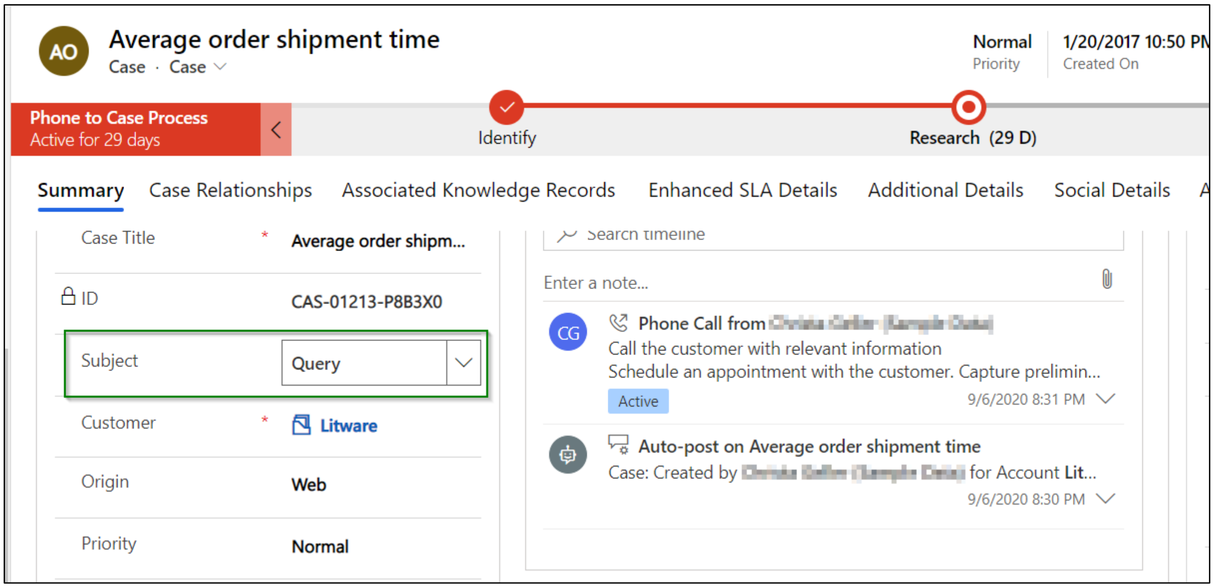


18) Navigate back to **Case** → **Open** a case record → **Change** the value of the field **'Subject'**.

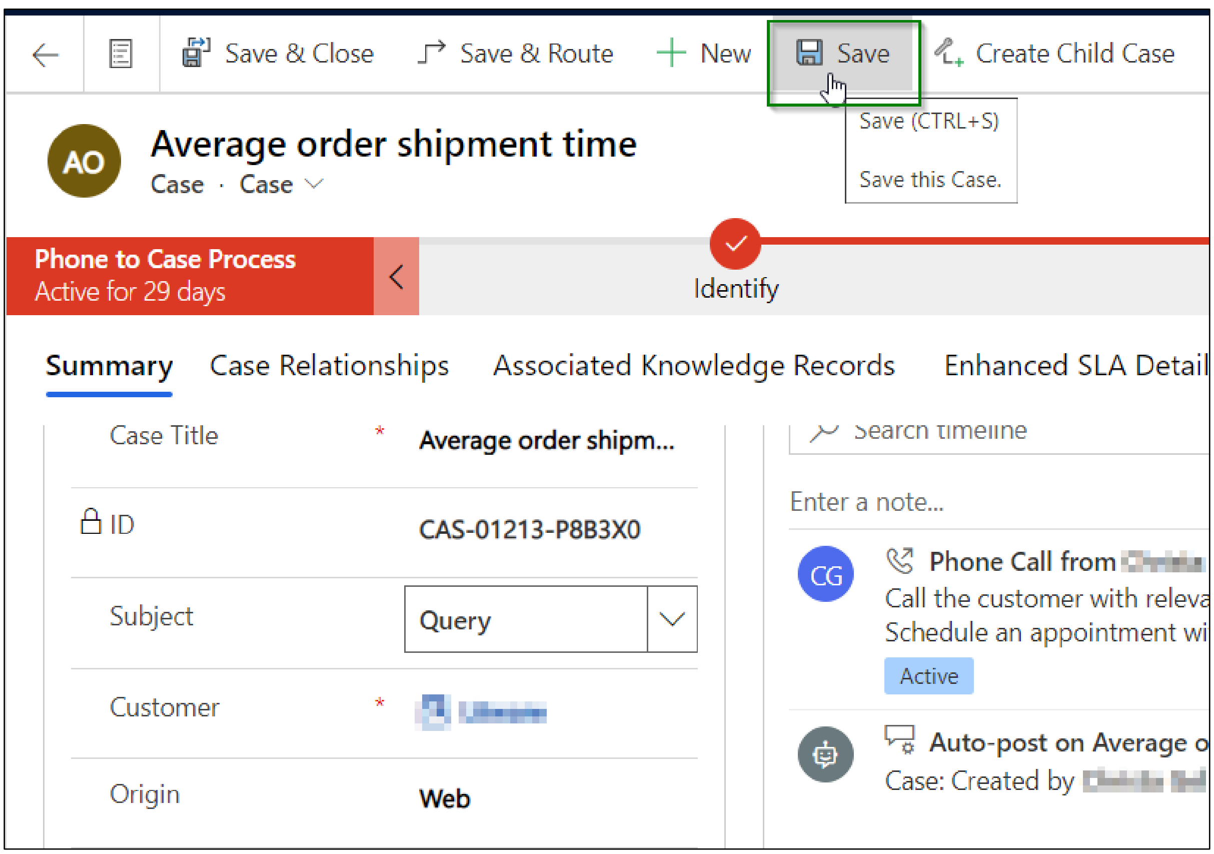


19) Change the subject from **‘Delivery’** to **‘Query’.**

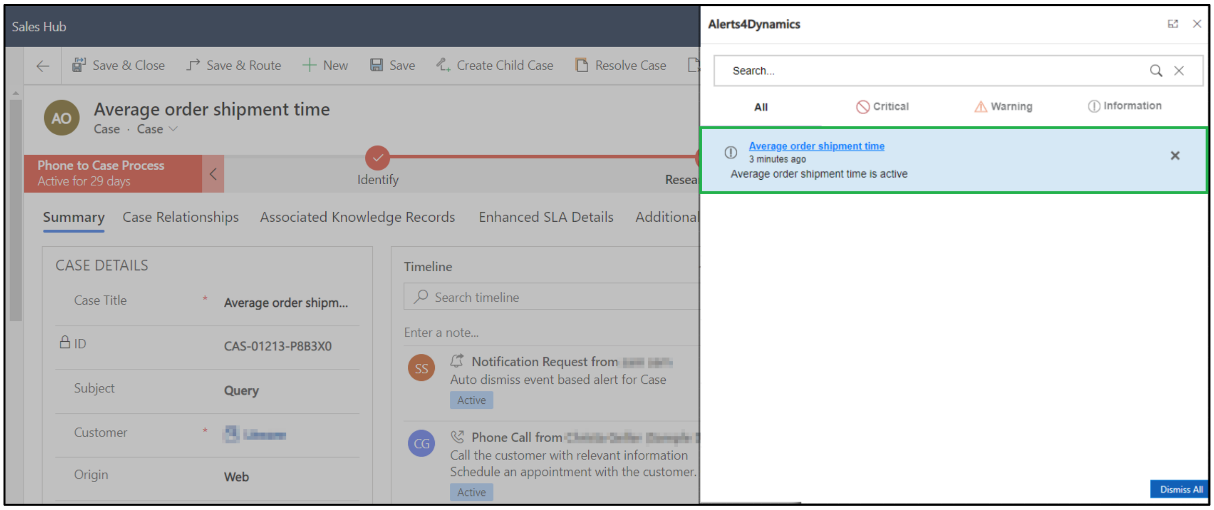




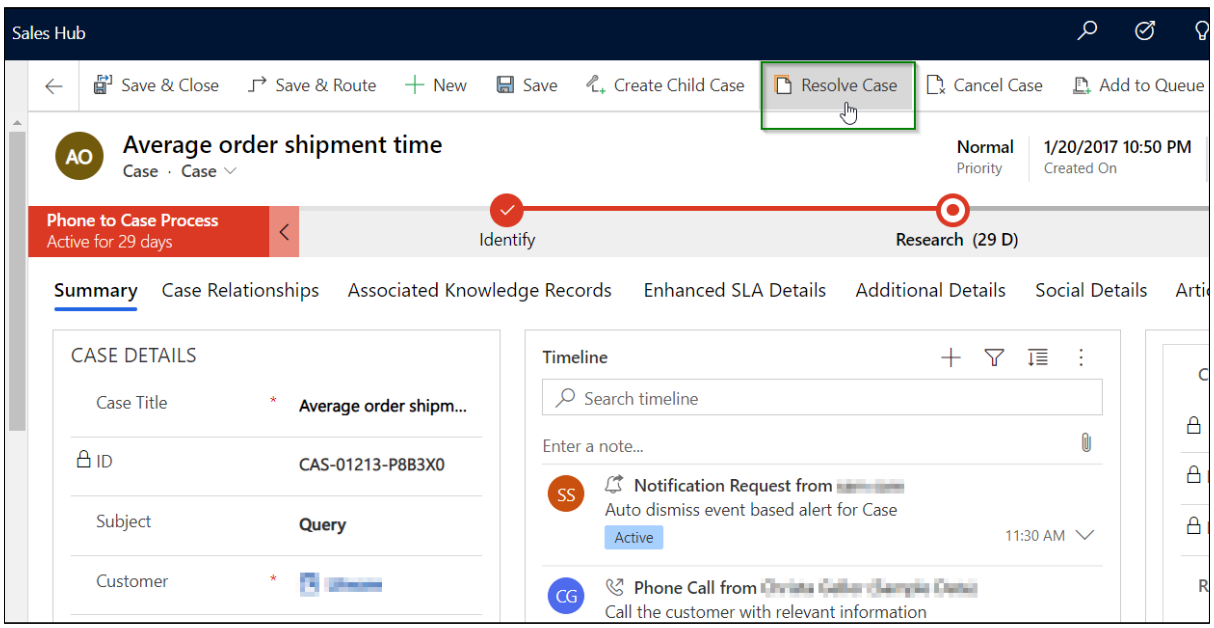
20) Click on **'Save'**.

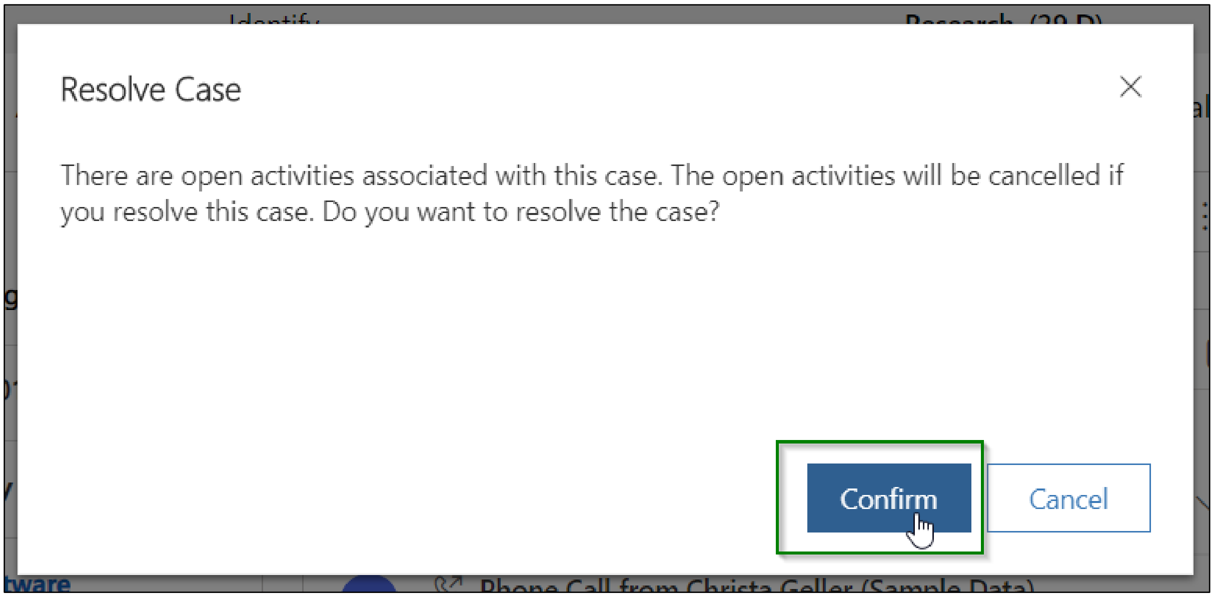


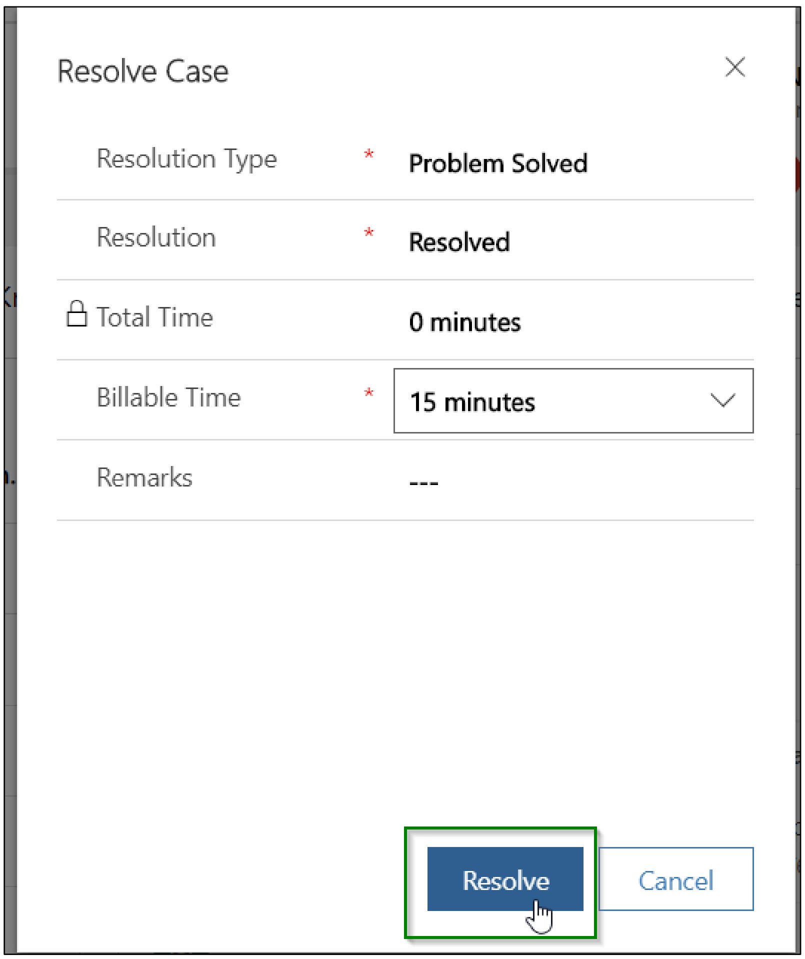
21) Once saved successfully, an alert will be shown as a **Dialog** on the case record. It will continue showing up until the case is resolved.



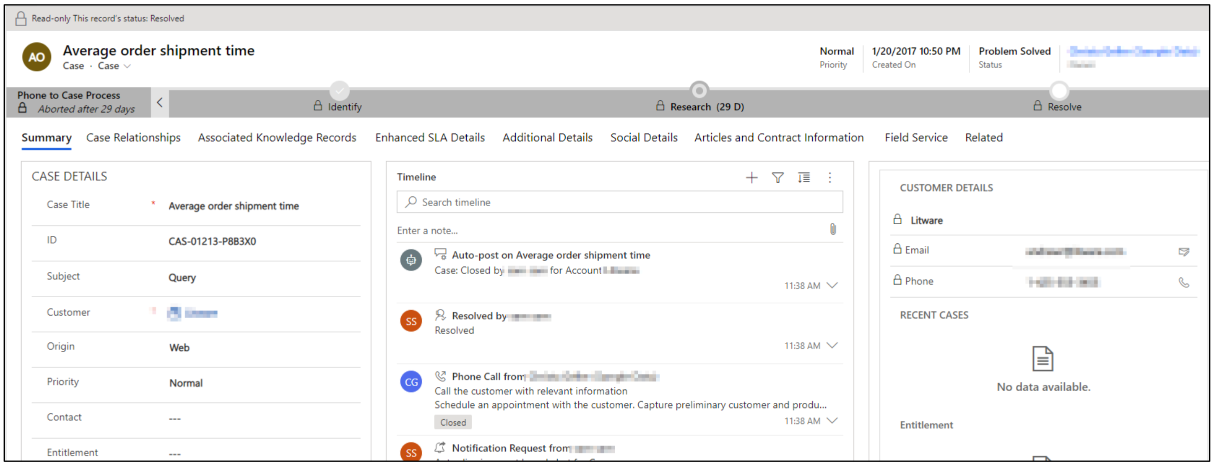
22) Now, let's mark this case record as resolved.







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



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.

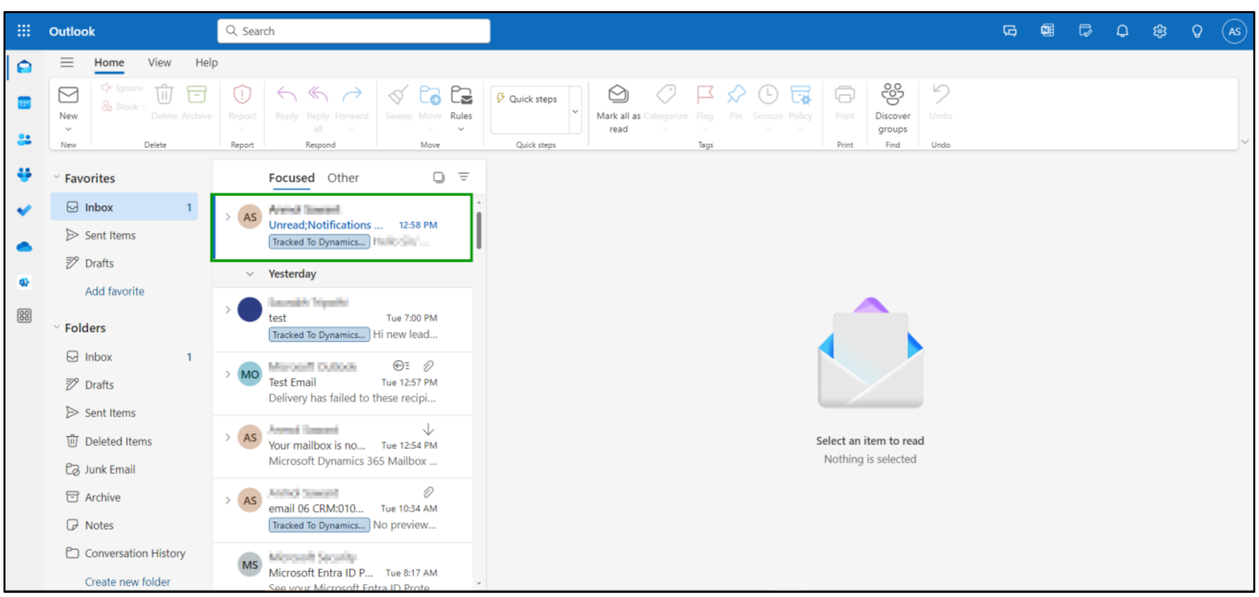
Email Digest Workflow

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

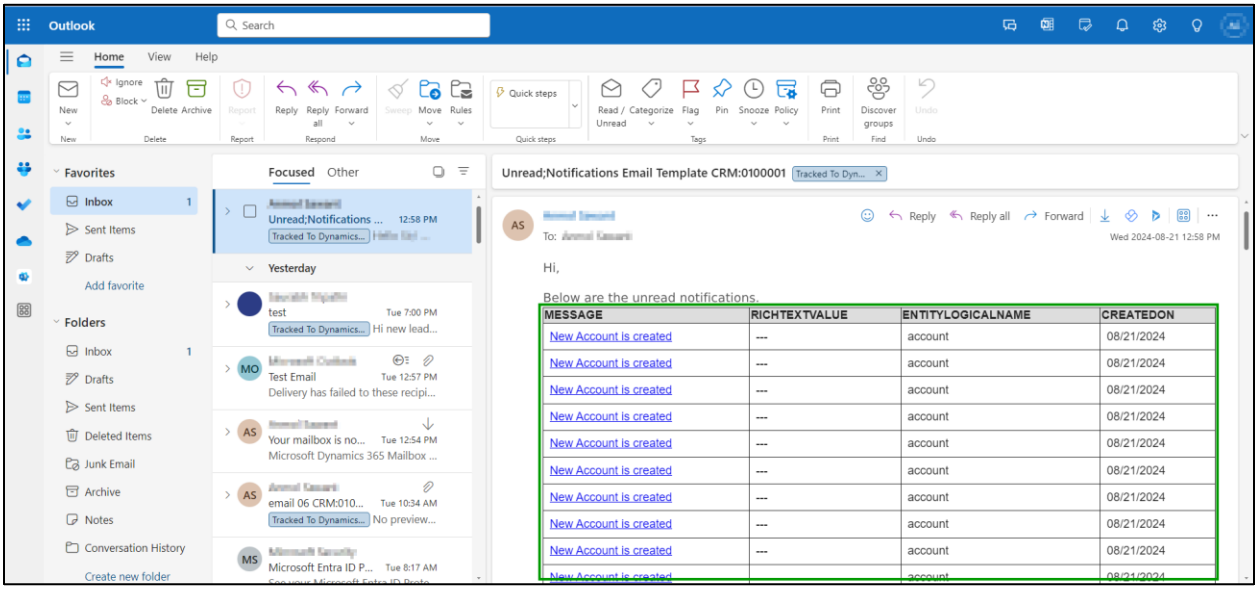
For instance: Here we have done the configuration for receiving unread notifications via email in CRM and external email accounts such as Outlook on a daily basis.

Outlook:

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

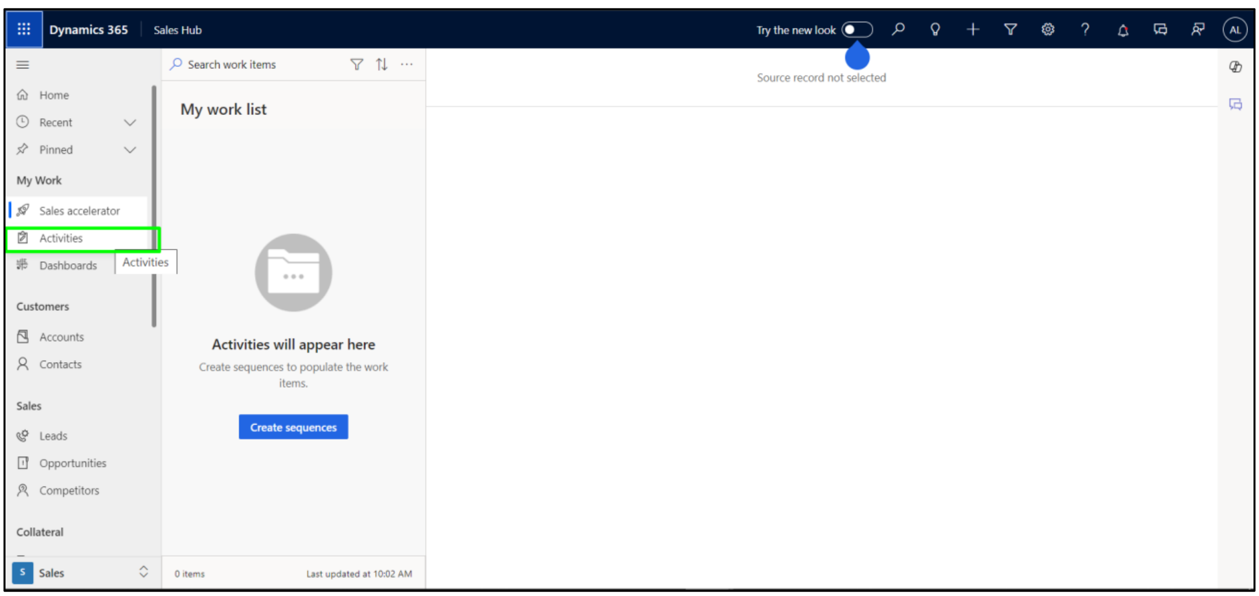


- Now all the unread notifications will appear in the email Body.

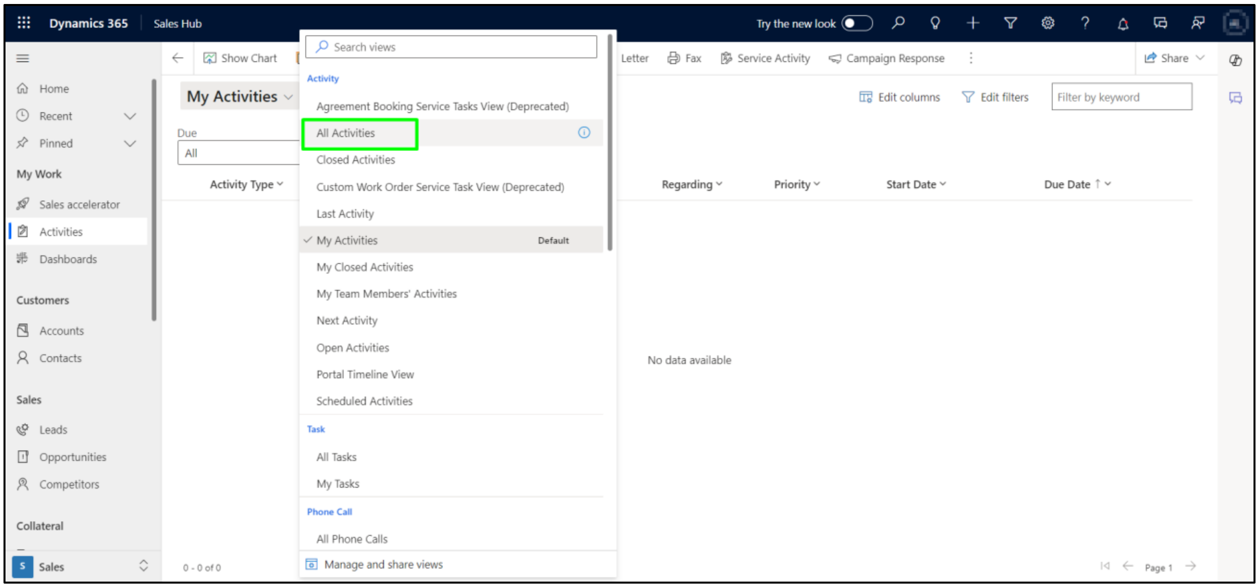


CRM:

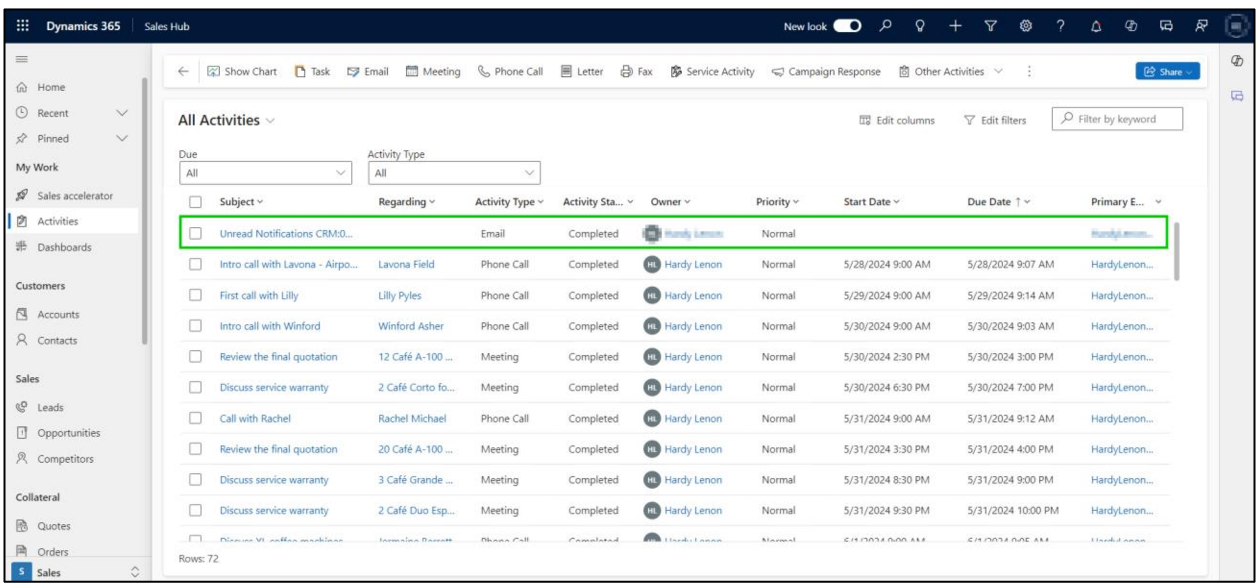
- To view the Unread Notifications in CRM, go to **Sales Hub → Activities.**



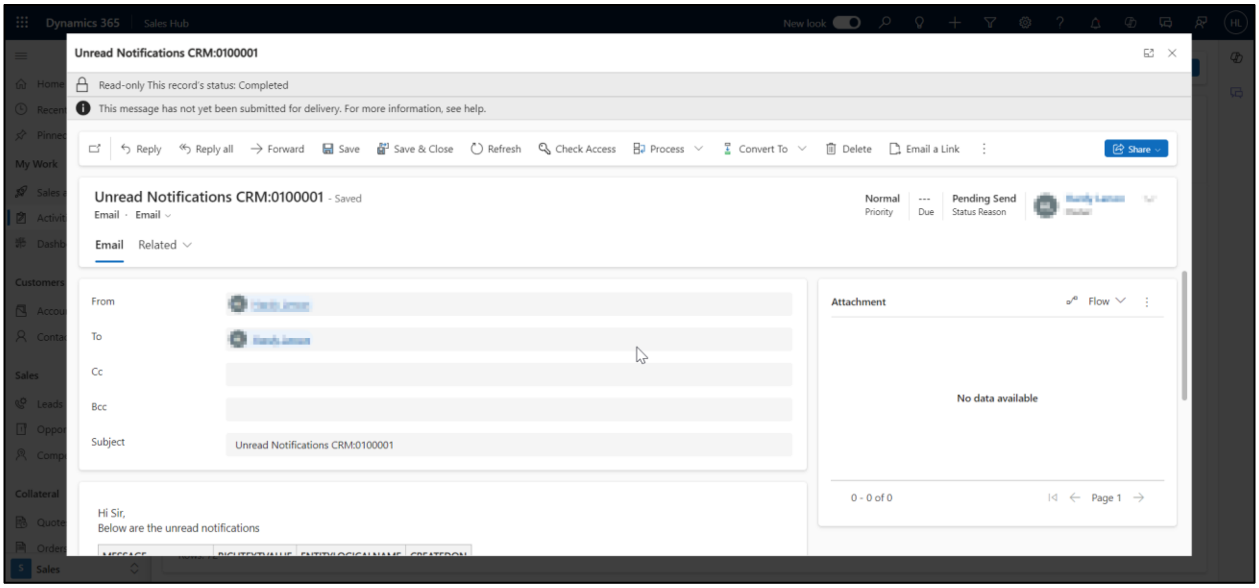
- Go to **"All Activities".**

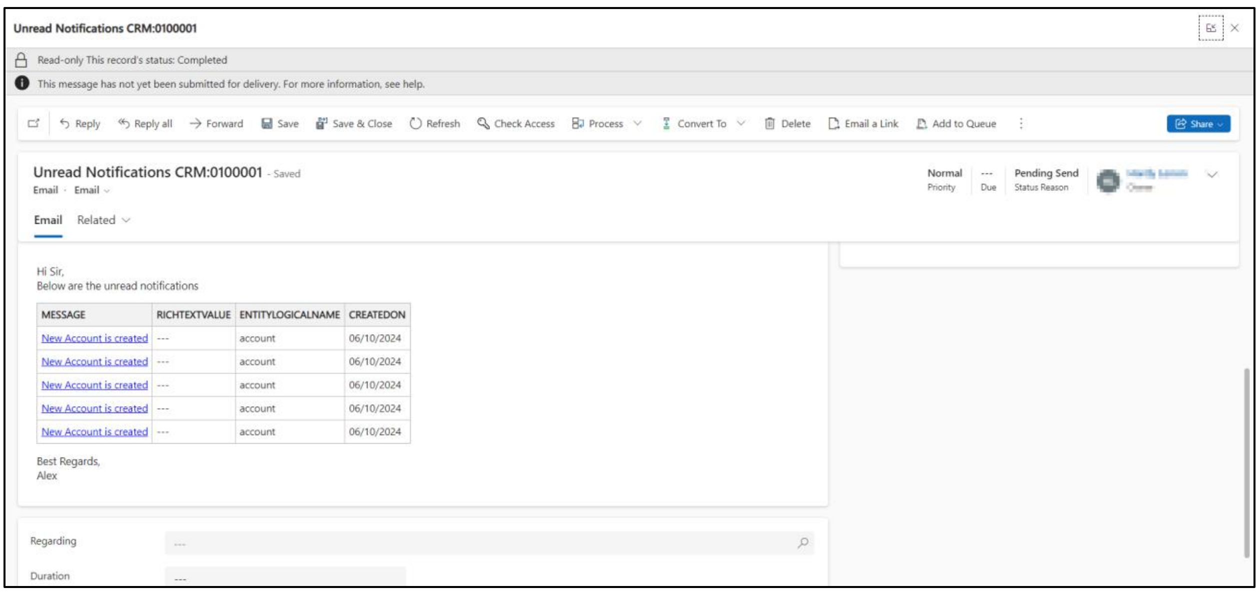


- Click on the suitable **"Email Activity Record."**



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





Post Notification

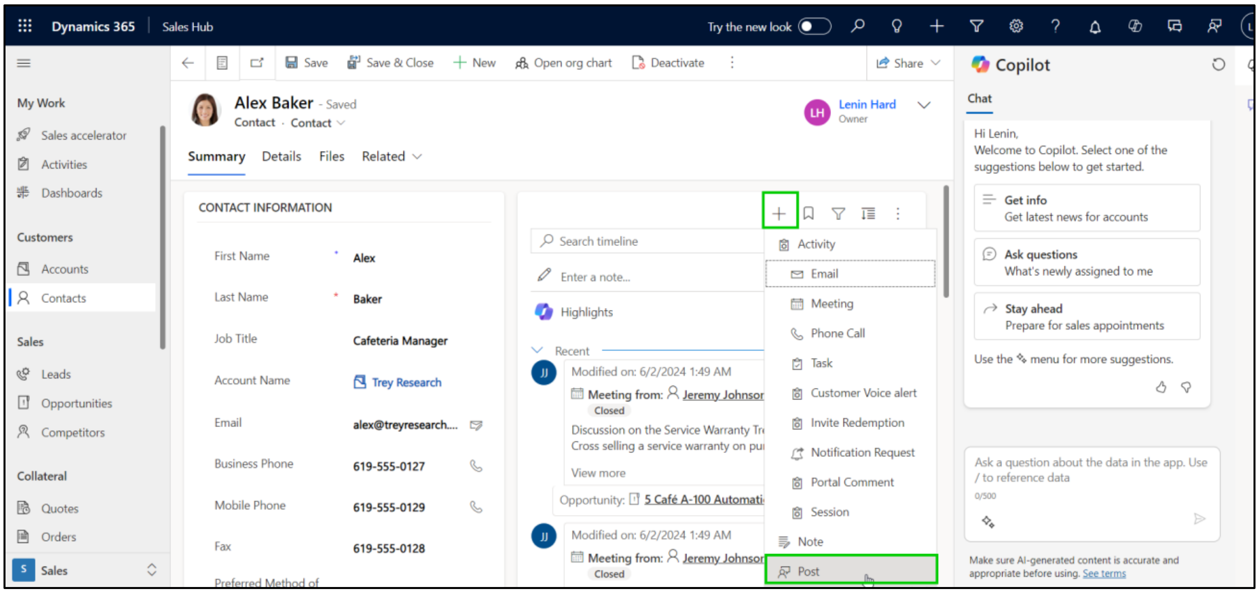
Post Notification feature allows users to create custom post messages and tag users on the timeline to deliver these messages as notifications to tagged users.

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

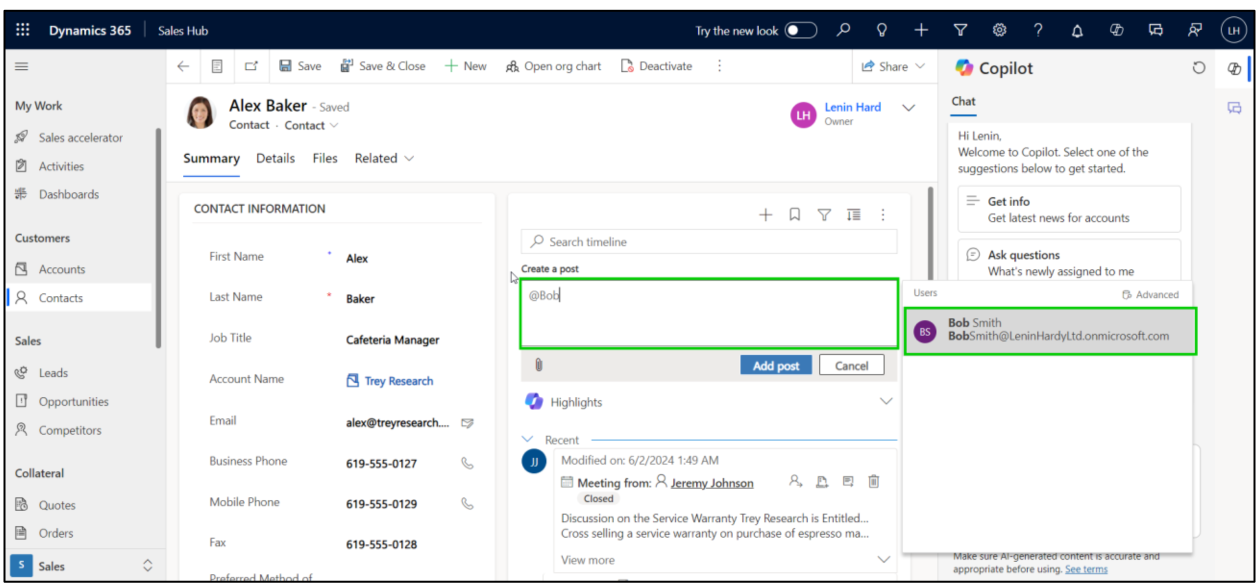
Example 1: A single user is tagged with a common message.

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:

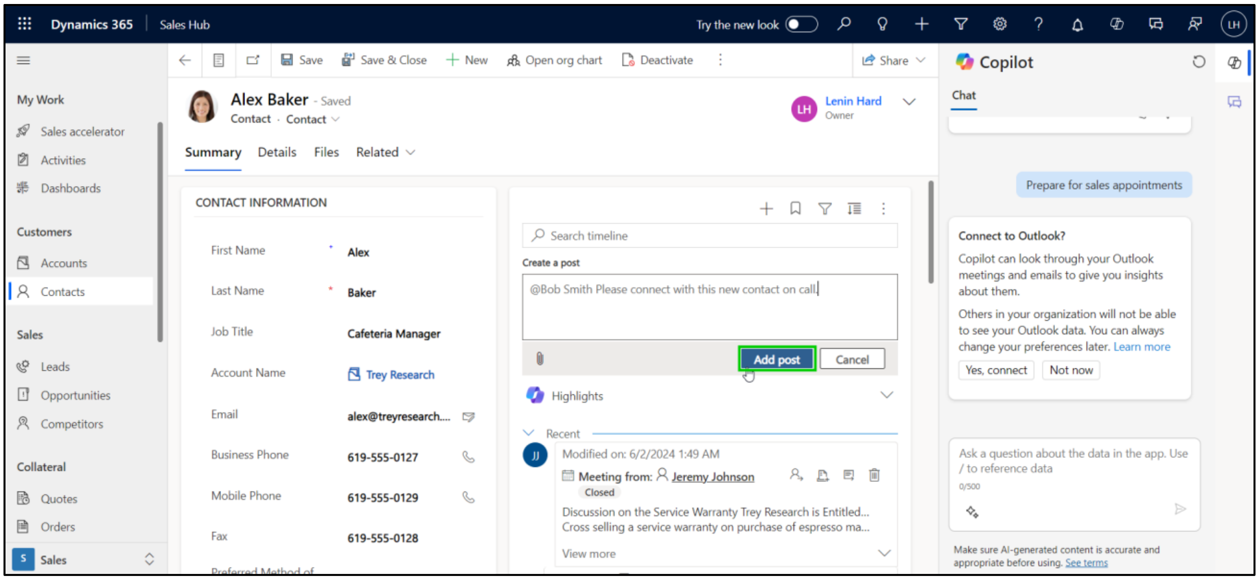
- Go to the entity record for which you have configured the post notification feature.
- Here we will go to **Contact** Record **-> Timeline,** click on add **"+"** button, and select **'Post'**.



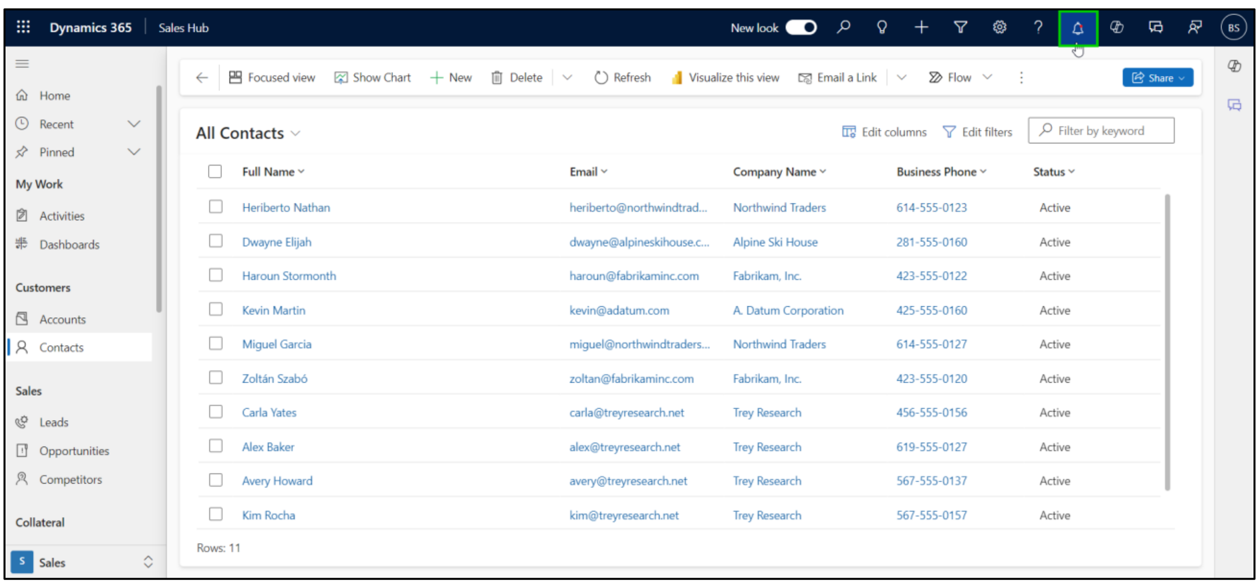
- Tag the user you want to deliver the custom post message to.

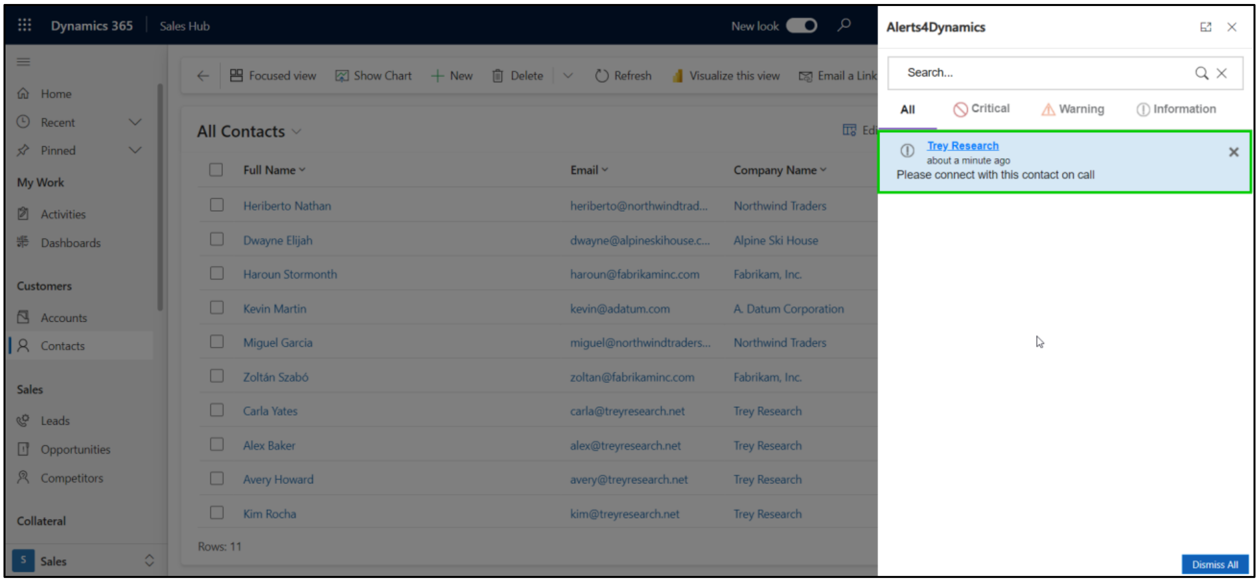


- Type the message and click **'Add Post'** to deliver the message as a notification to your desired user.



- 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.

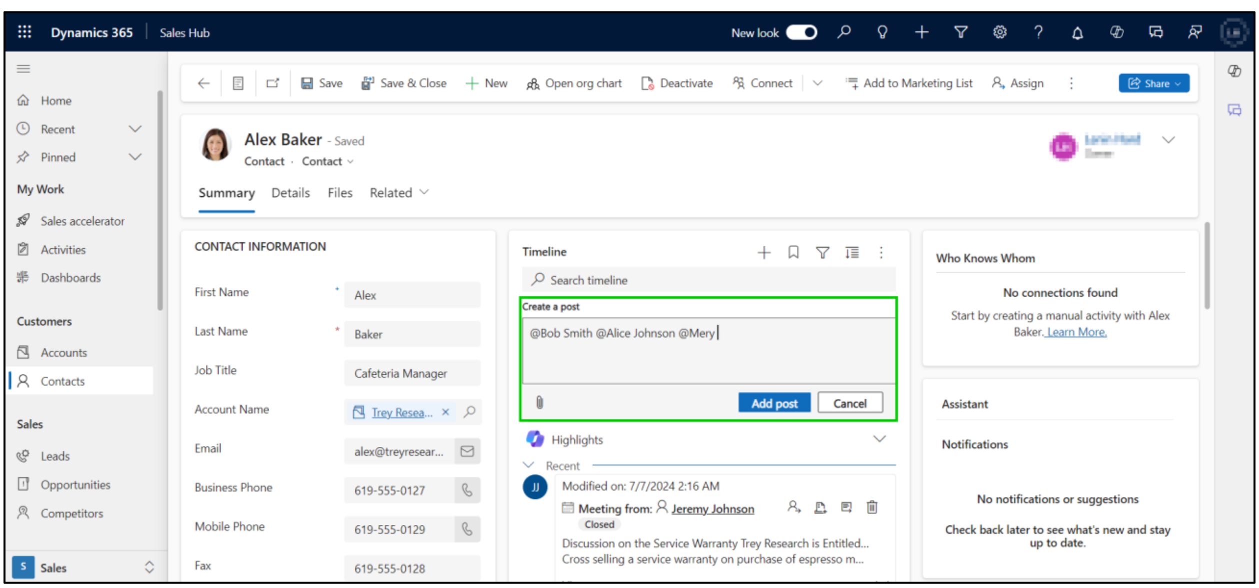




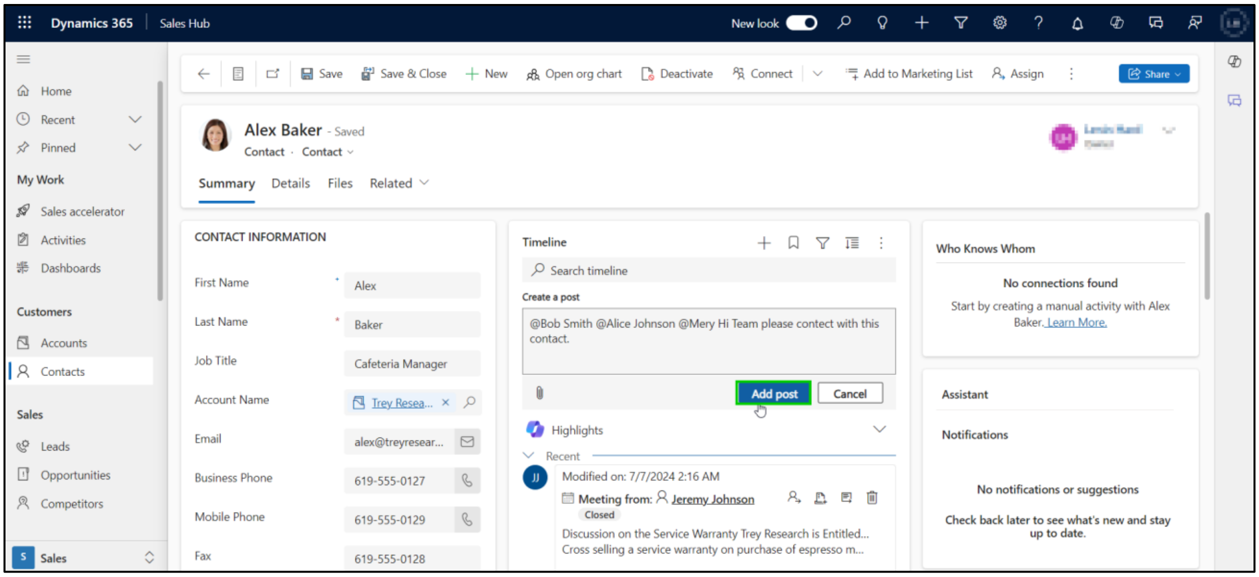
Example 2: Multiple users are tagged with a custom post message.

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.

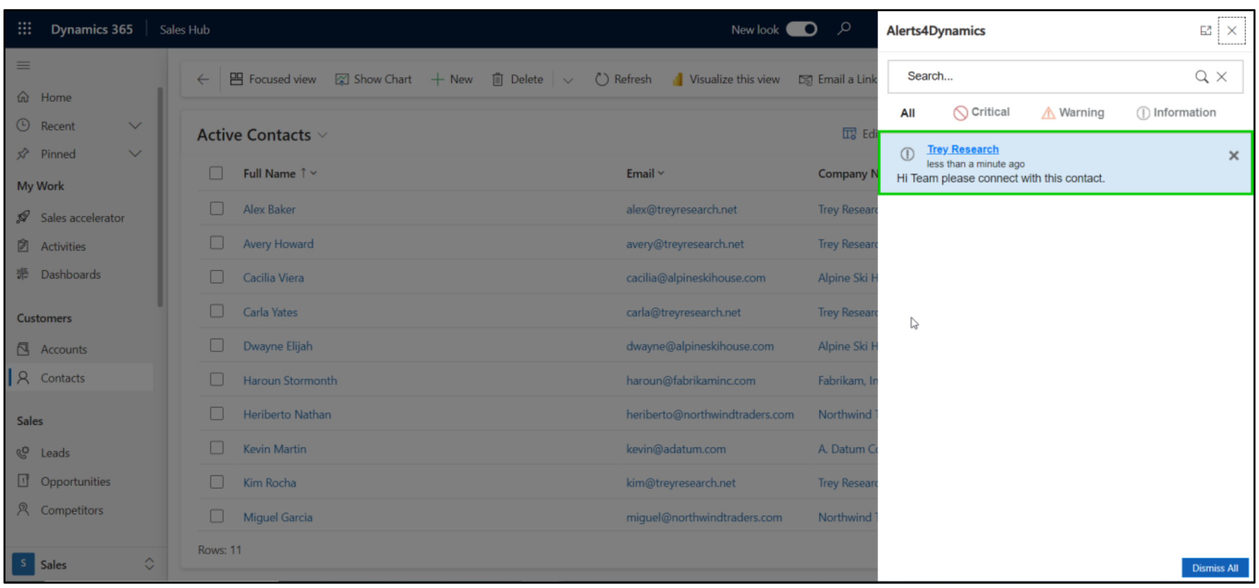
- Tag the users you want to deliver the custom post message to.



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



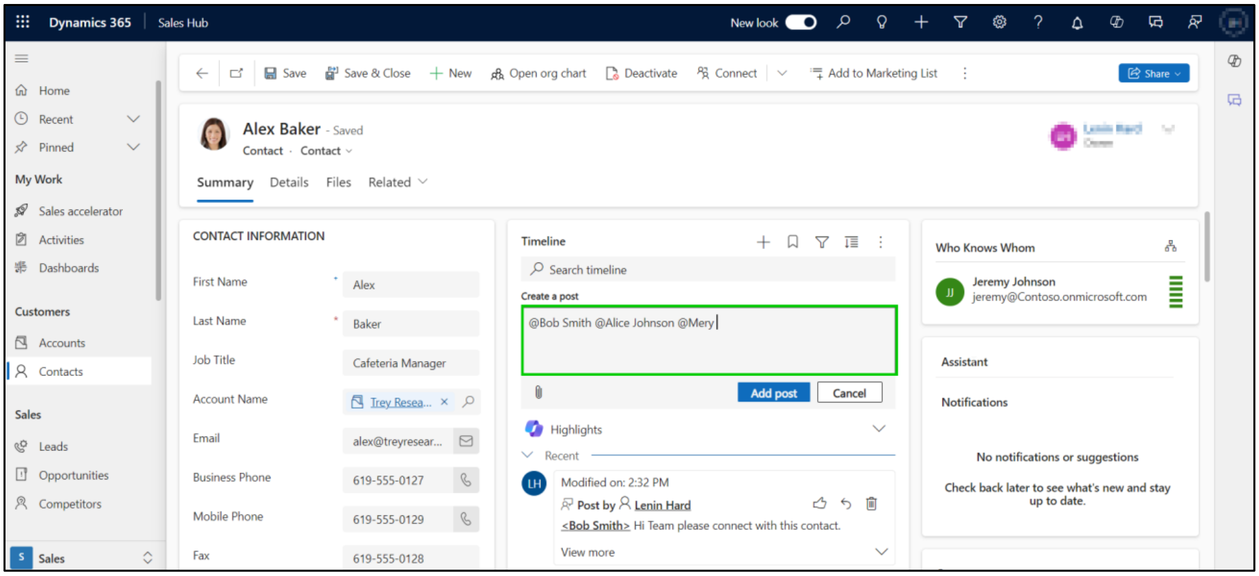
- Now the users you've tagged in the message will receive a post notification on the alert panel.
- To see the post notification, log in with the user who is mentioned in the post.



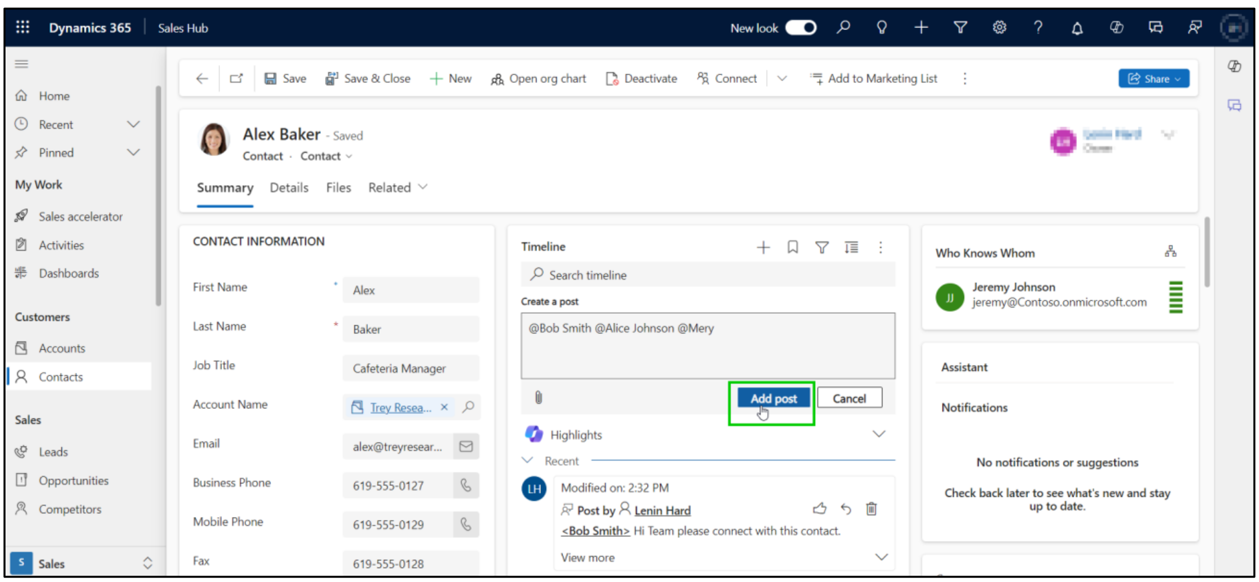
Example 3: Multiple users are tagged without a custom post message.

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.

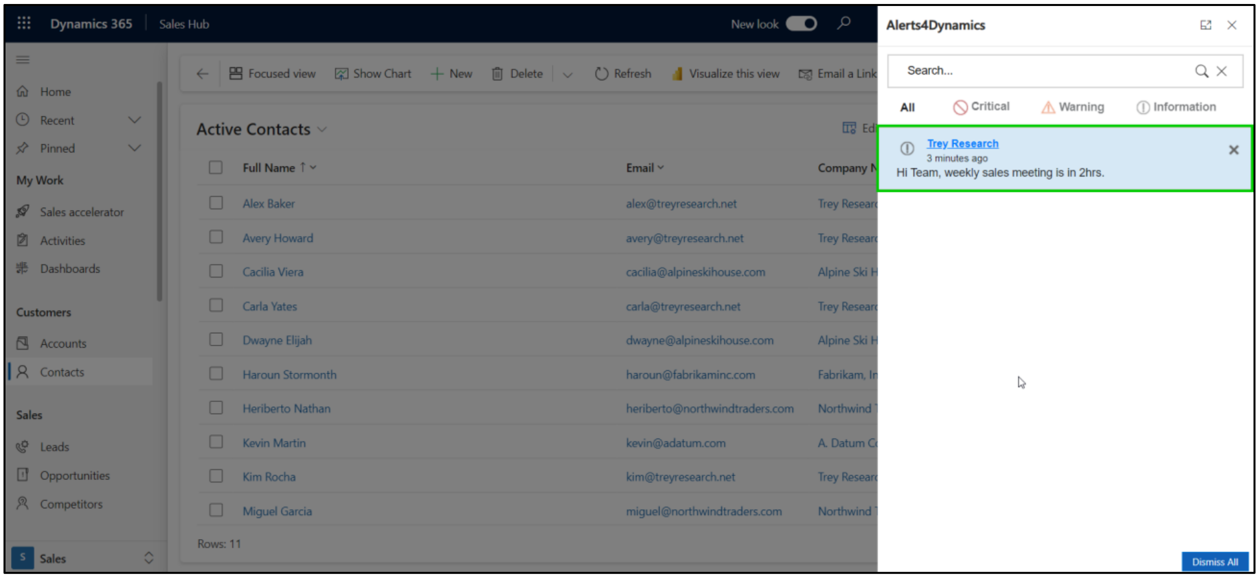
- Tag the users you want to deliver the common message to via workflow.



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



- 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.



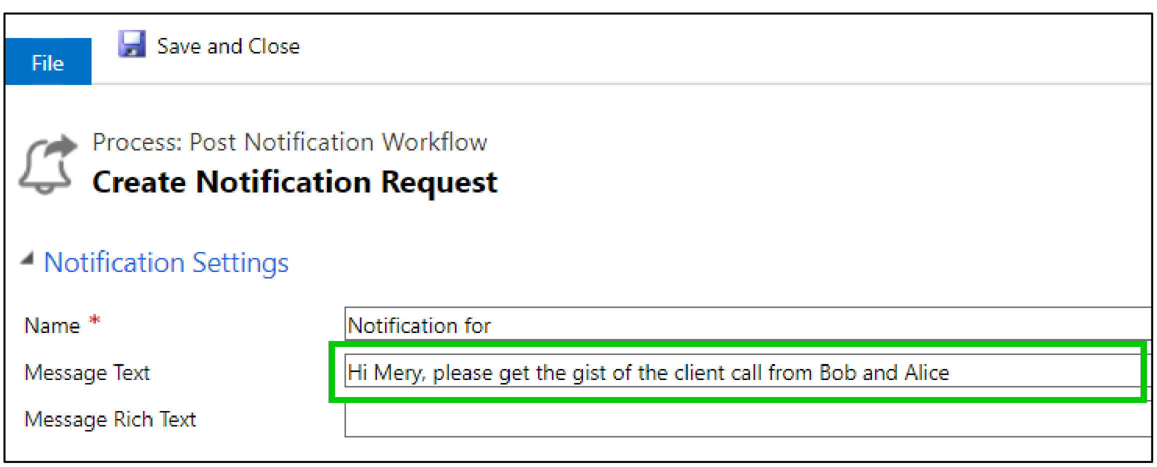
Note:

- ***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.***

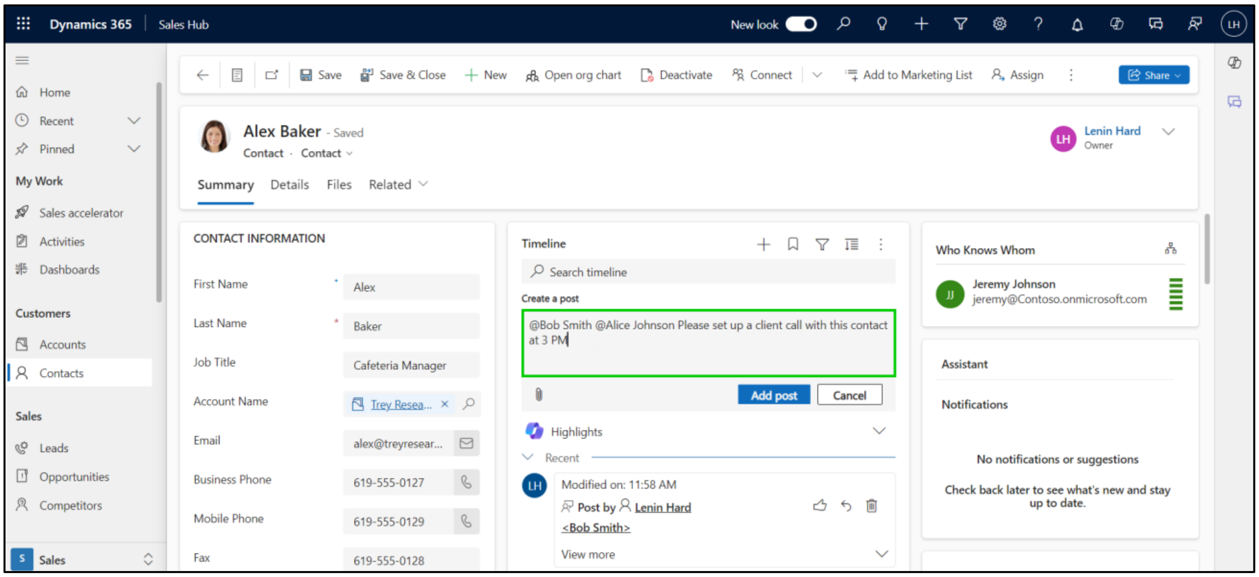
Example 4: Multiple users are tagged with a custom post message, but a single user is tagged without a message.

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.

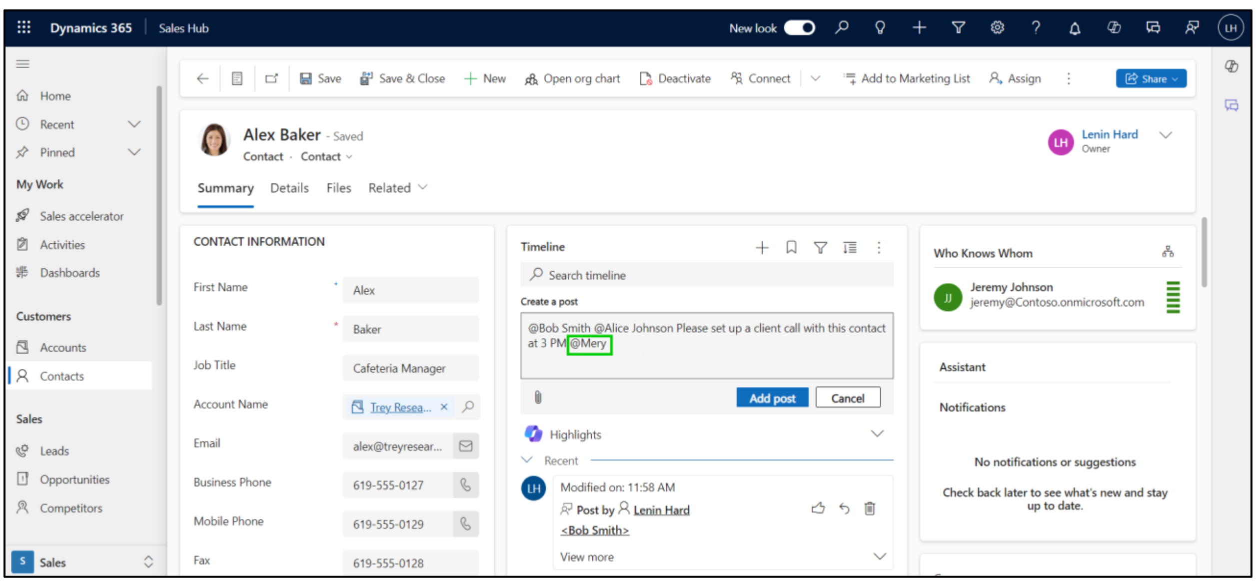
- Navigate to workflow that you had configured earlier (Post Notification Workflow), and set up the workflow message.



- Go back to the record and tag the users you want to deliver the custom post message to and type the Message.

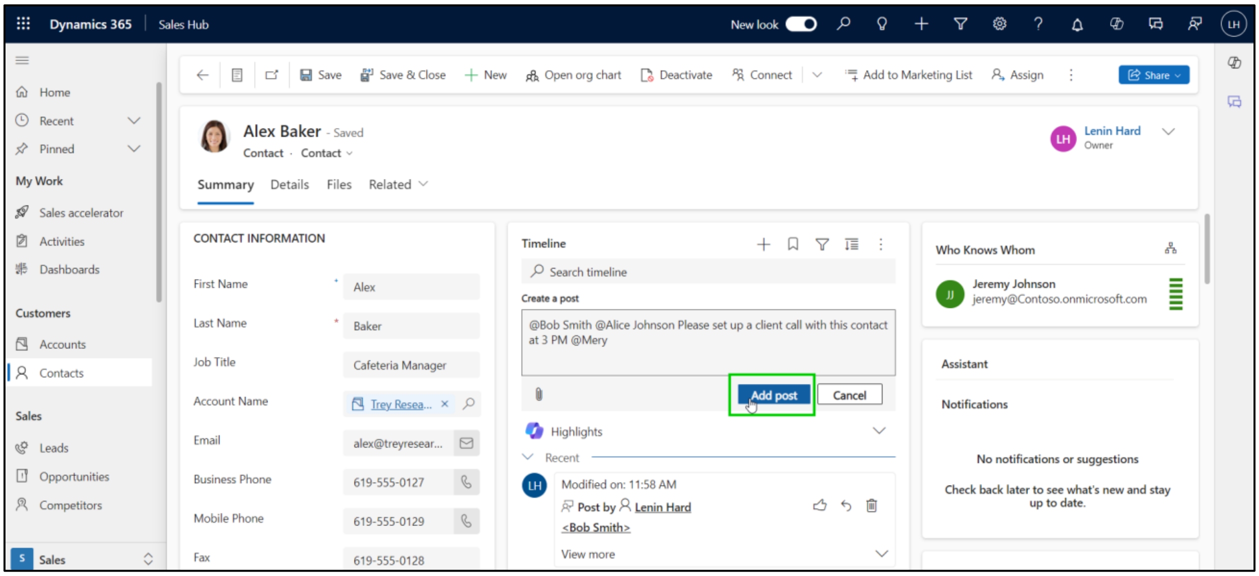


- Now tag the user to whom you want to deliver the message that you have set up in the workflow.

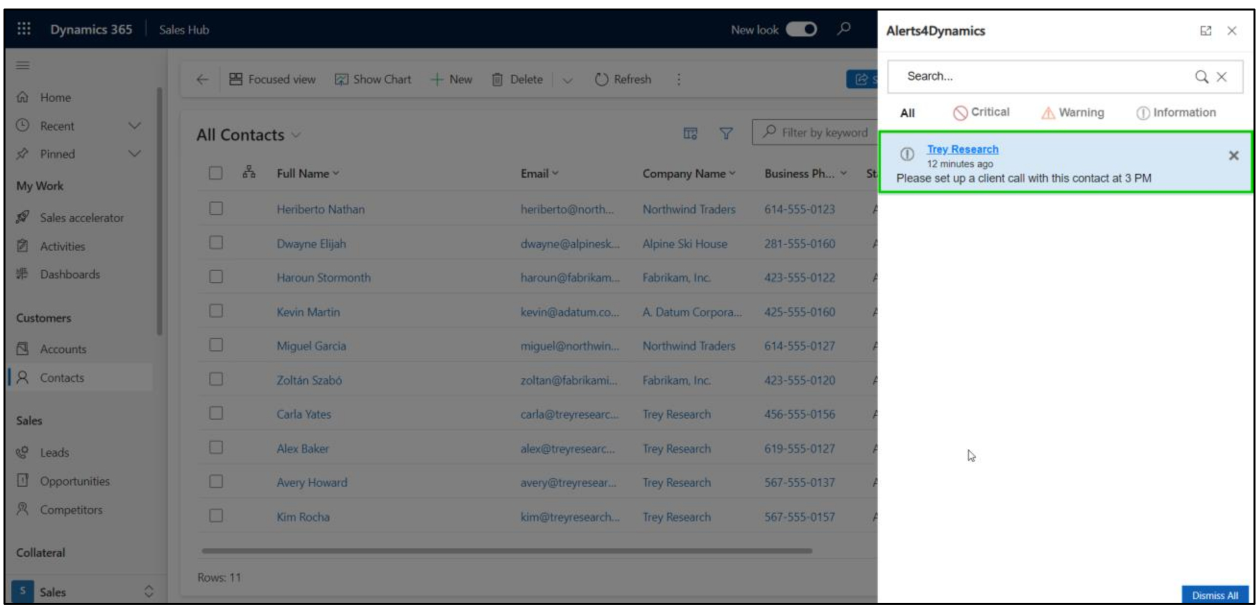


Note: To type a custom post message, follow the pattern: "@username then message." If you type the message before "@username," then you won't receive the custom message notification in the alert panel. However, if you have already configured a workflow to deliver a common message, your users will receive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

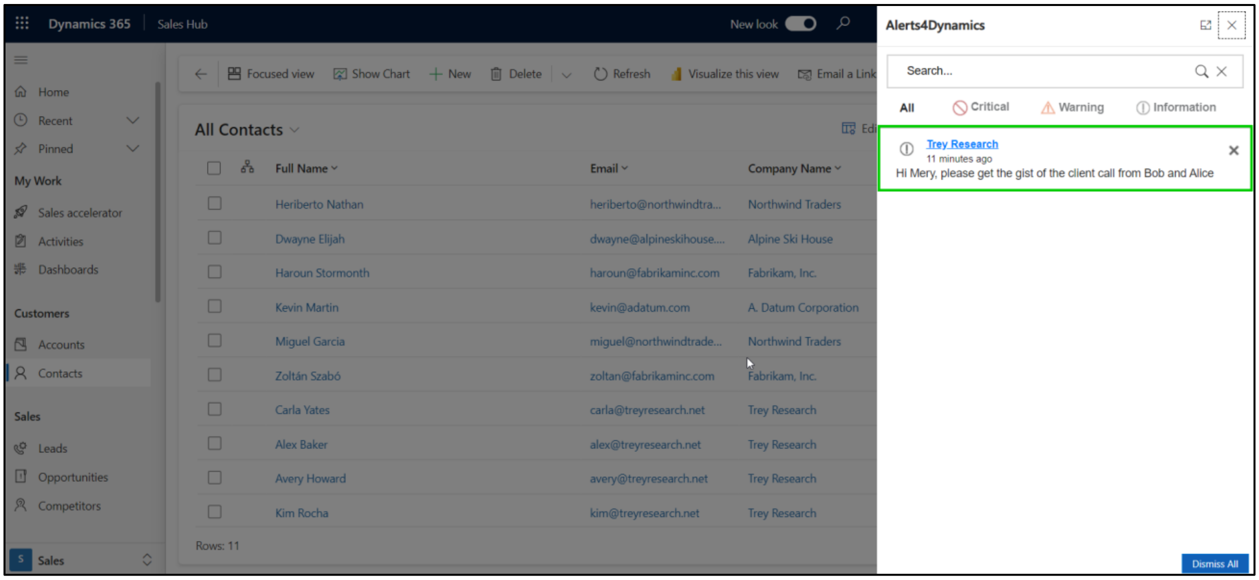
- Now click **'Add Post'** to deliver the custom post message and workflow message to your desired users.



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

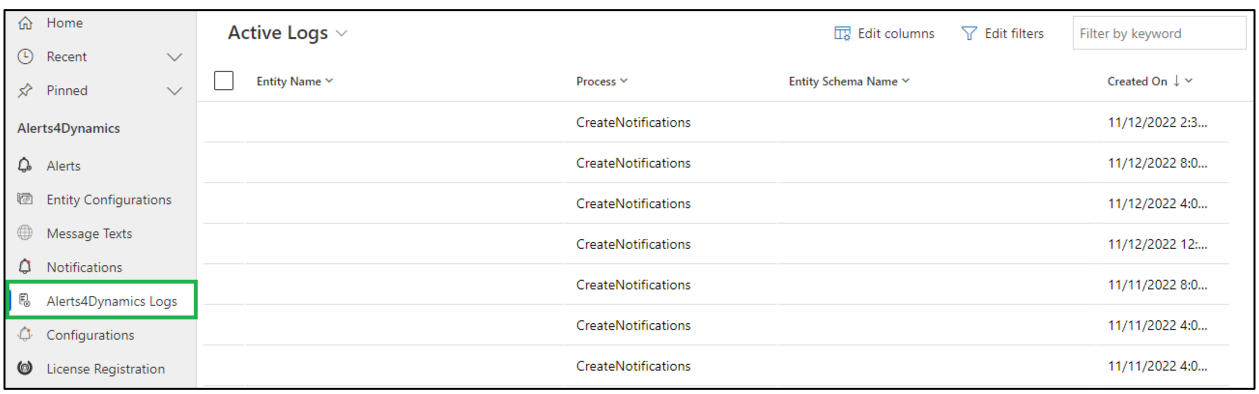


- Now the users you've tagged without the message will receive a notification on the alert panel with the workflow message.



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 → Alerts4Dynamics Logs.**



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.

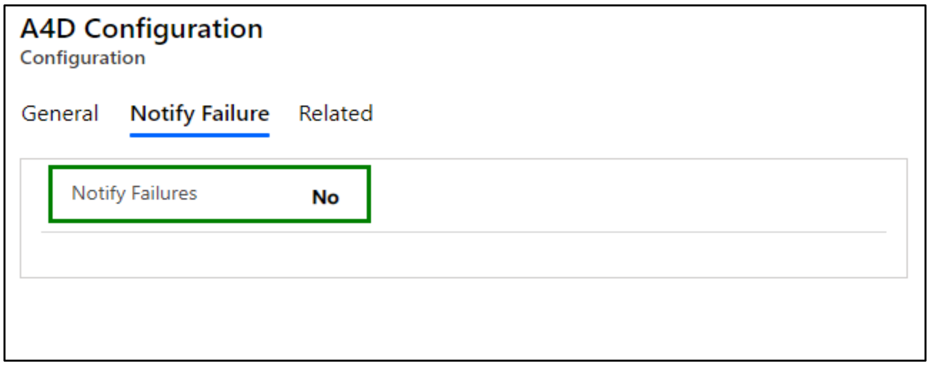
If there are any notification failures, then daily a mail will be sent out to the defined users in the setting.

Given below is the step to enable notify failure:

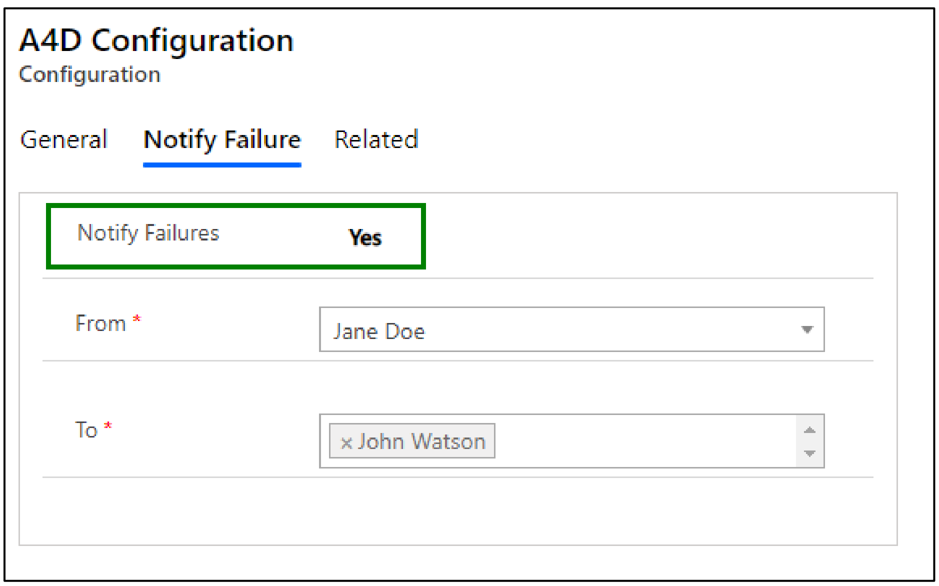
When the user clicks on the **‘Activate’** button on License Registration form, **‘Configuration Record’** is automatically created and becomes visible under **‘Configuration’** entity of Alerts4Dynamics.

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.



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.



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