



User Manual

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Introduction

Alerts4Dynamics is a productivity app for Microsoft Dynamics 365 CRM which enables managers to schedule and manage alerts in Dynamics 365 CRM to notify users about the updates in CRM, due invoices, reminder to send quotes, etc. Managers can define target audience and send them priority based alerts and also see which user has read the alert.

Salient Features:

- Provision to create more engaging messages with all kinds of text formatting using Message Rich Text.
- Supports OOB as well as Custom Entities.
- Create Announcement and Rule Based/Record Based/Event Based alerts.
- Alerts can be viewed as pop-ups, form notifications or sent as email not only to users but also to customers as well.
- Alerts levels can be categorized as Information, Warning or Critical.
- View the log of alerts read/dismissed by users.
- Add start/expiration dates for all alerts.
- Alerts can be configured to be shown to particular set of audience as well as for dynamics audience.
- Related records can also be added for Notification and Email audiences.
- View alerts from anywhere in CRM.
- Provision to set up preferences to receive alert notifications as per user's choice.
- Provision to configure the alerts as dismissible/non-dismissible.
- Provision to configure the alerts as auto dismissible/non-auto dismissible.
- Control the display behavior of alerts.
- Provision to search for notifications on Notification panel.

Available for: Microsoft Dynamics 365 CRM 9.x and above, Dataverse (Power Apps).

Deployment: On-Premises and Online.

Security Roles

Three security roles, particularly for **Alerts4Dynamics**, come along with the solution.

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

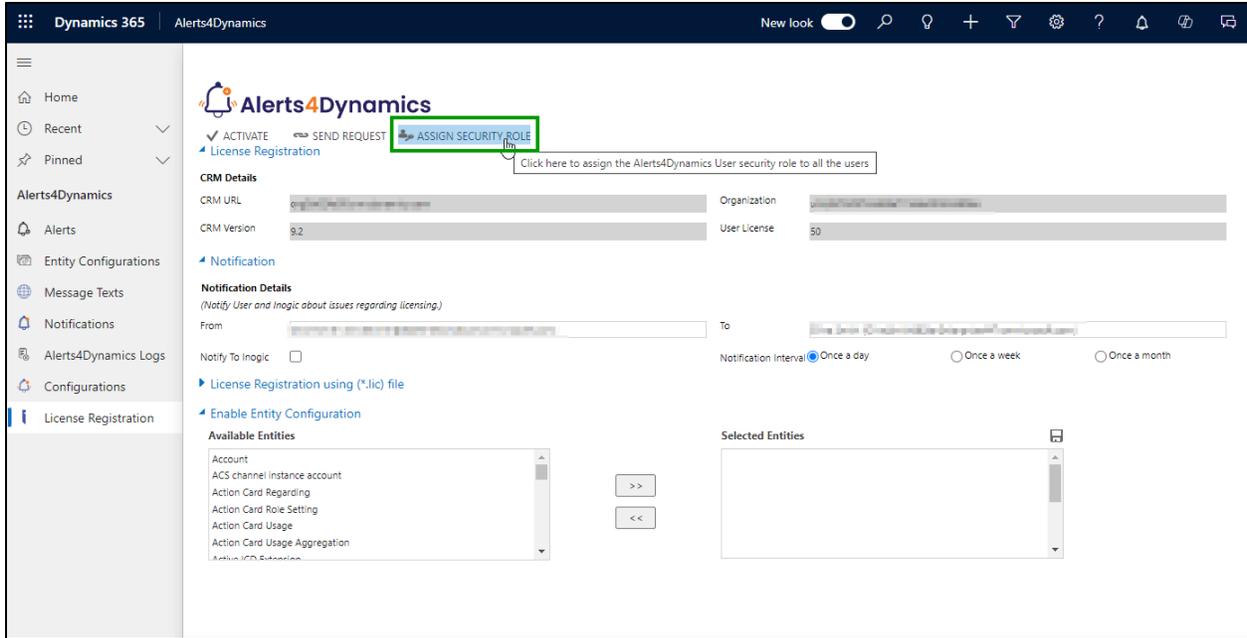
Note:

- *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.*

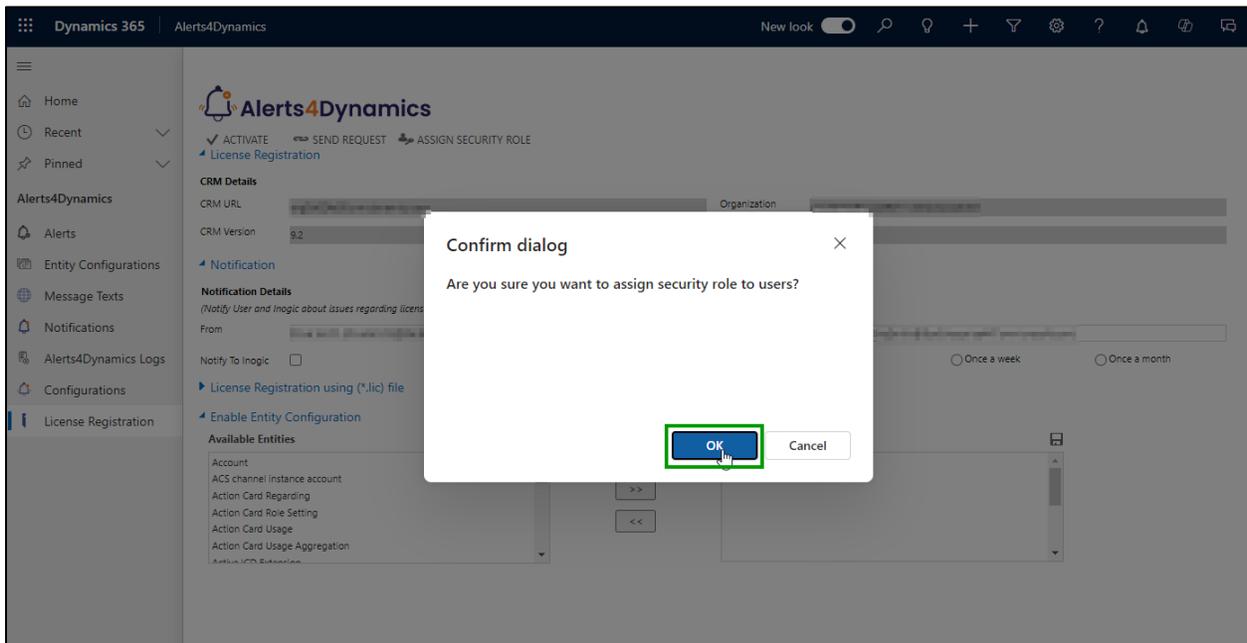
Follow the simple steps given below to assign security roles to CRM users.

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

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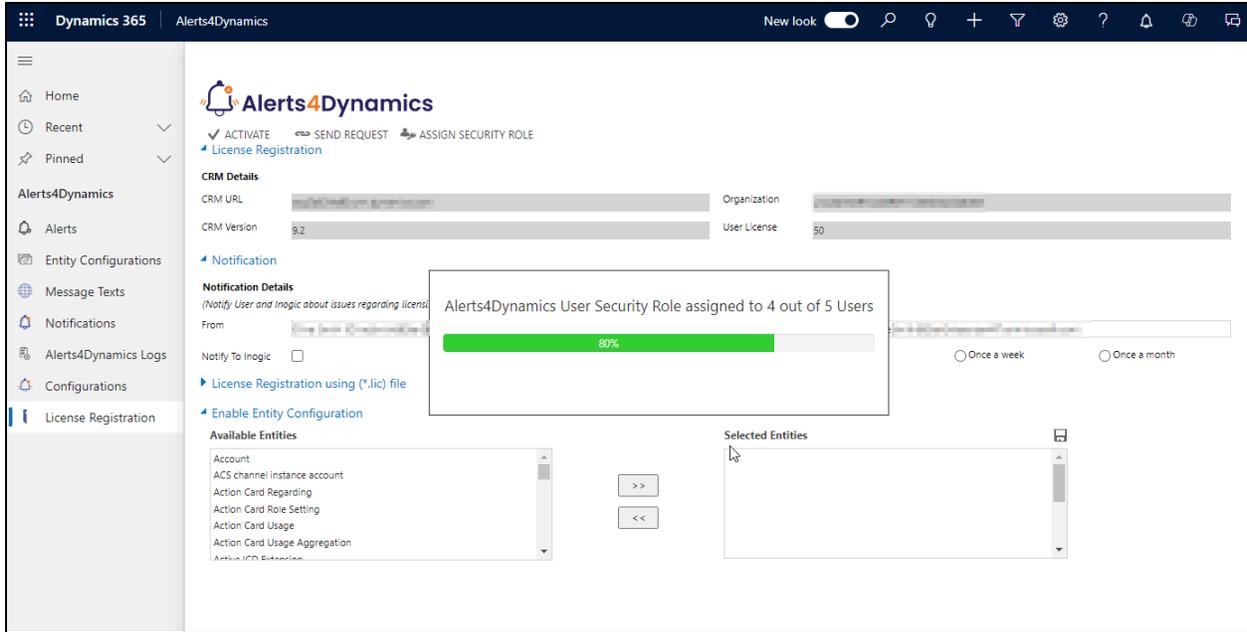


- A confirmation dialog box will appear. Click on **OK**.

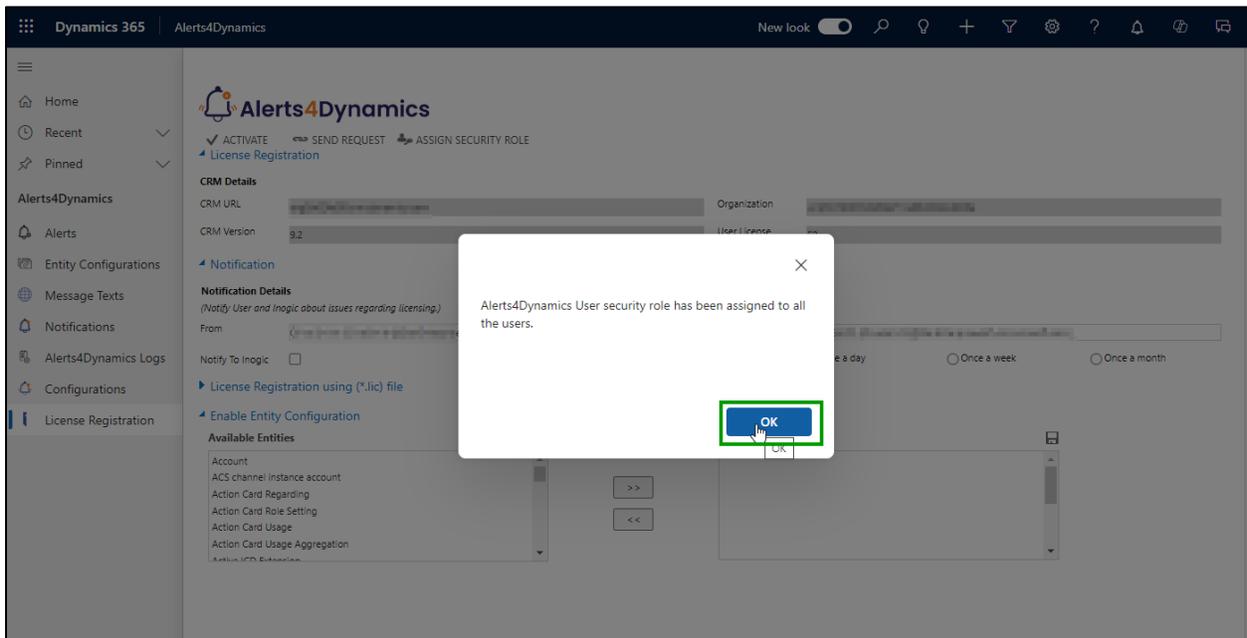


- The **Alerts4Dynamics** user security role will now be assigned to all the users present in Dynamics 365 CRM.

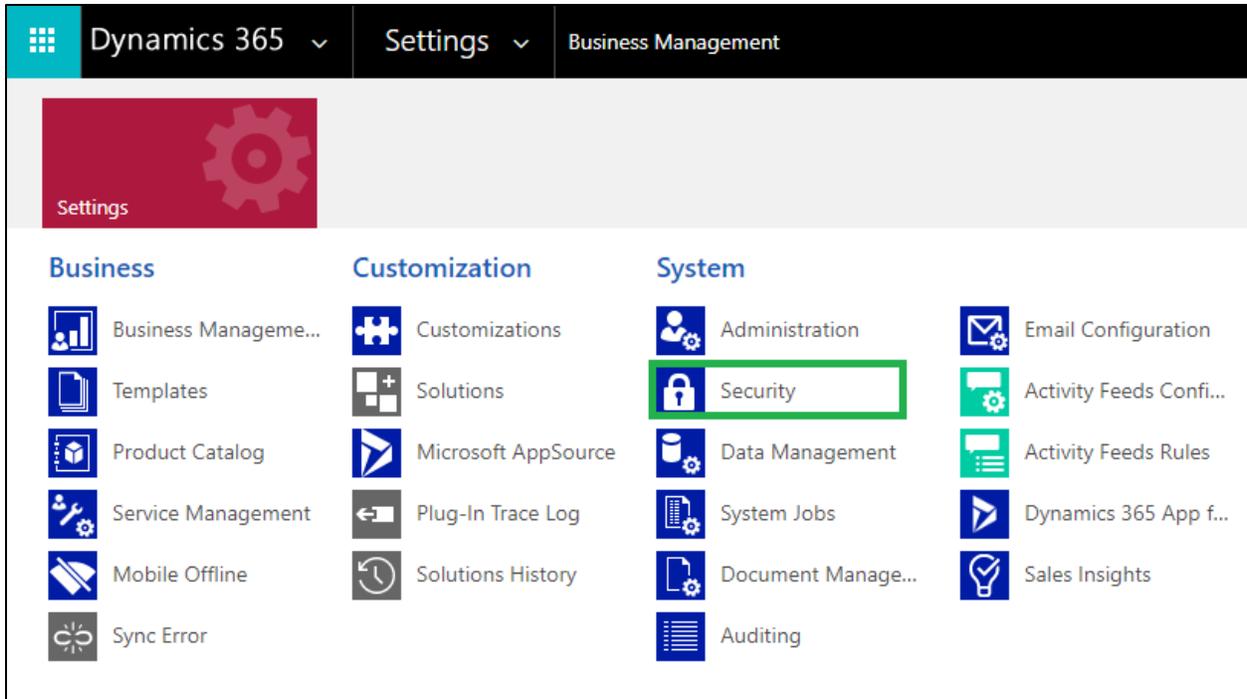
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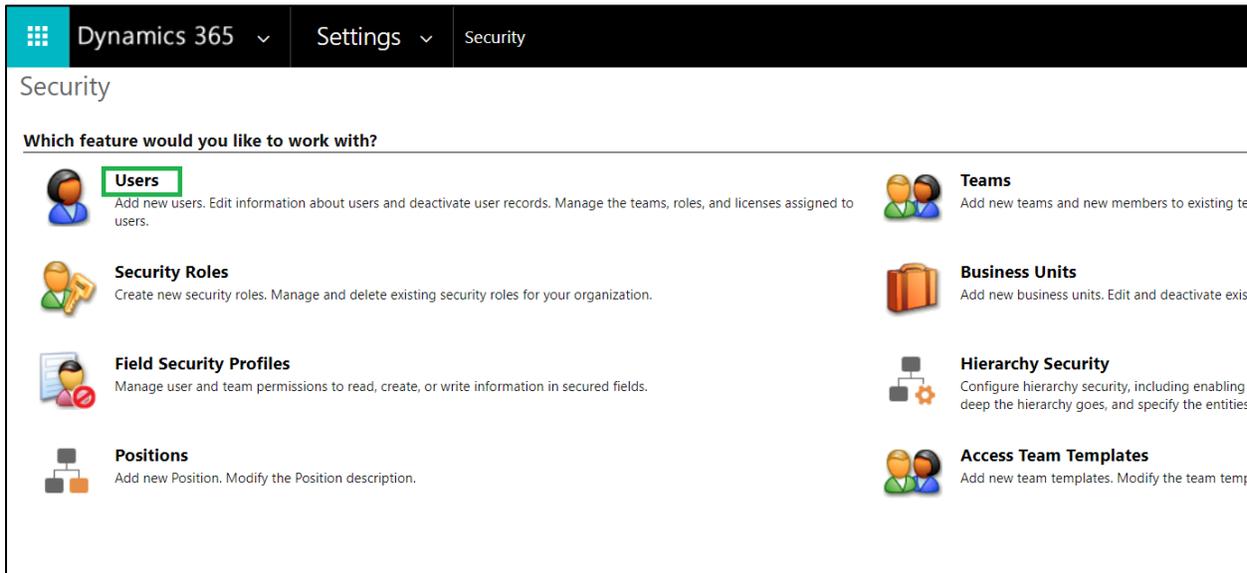
- Now click on "OK" to close the pop up.



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



- Select **Users**.

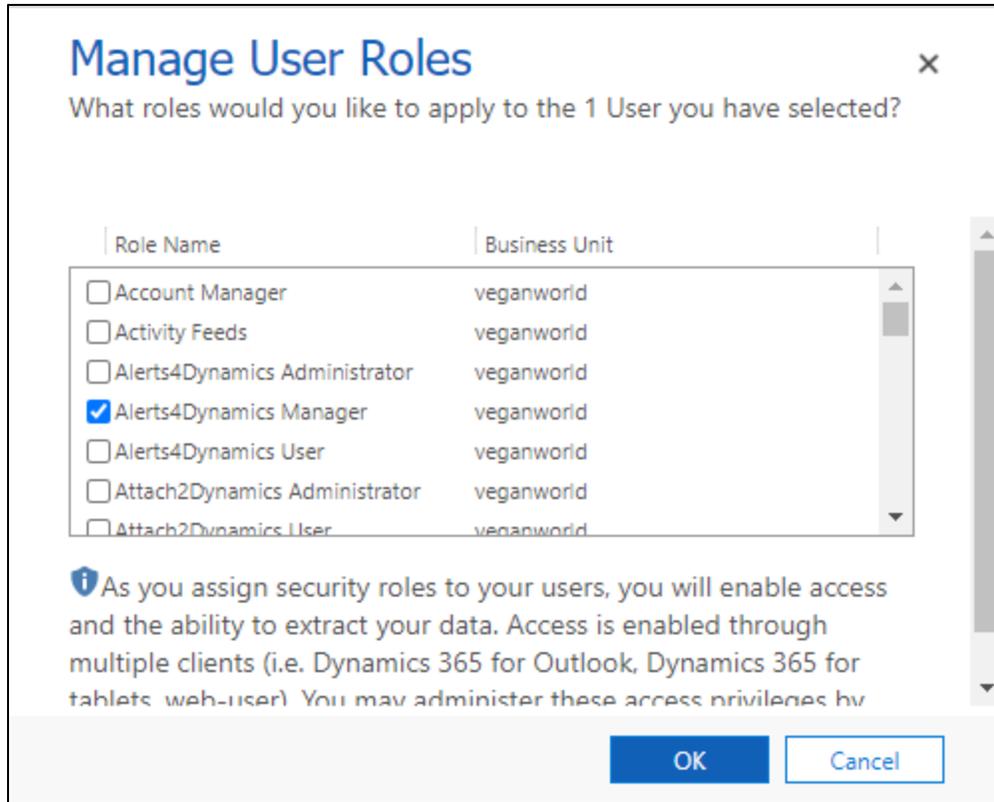


- Select user --> Click on **MANAGE ROLES**.

The screenshot shows the Dynamics 365 interface. At the top, there is a navigation bar with 'Dynamics 365', 'Settings', and 'Security'. Below this is a ribbon with several buttons: '+ NEW', 'EDIT', 'APPROVE EMAIL', 'REJECT EMAIL', 'PROMOTE TO ADMIN', and 'MANAGE ROLES'. The 'MANAGE ROLES' button is highlighted with a green border. Below the ribbon, there is a section titled 'Enabled Users' with a dropdown arrow. A table is displayed below this section, showing a list of users with columns for 'Full Name', 'Site', and 'Business Unit'. The 'Full Name' column is sorted in ascending order. The table contains five rows of data, with the last row, 'Sam Wayne', selected (checkbox checked).

<input type="checkbox"/>	Full Name ↑	Site	Business Unit
<input type="checkbox"/>	Harry Williams		veganworld
<input type="checkbox"/>	Microsoft Forms Pro		veganworld
<input type="checkbox"/>	Power Apps Checker Application		veganworld
<input type="checkbox"/>	Power Platform Dataflows Common Data Service...		veganworld
<input checked="" type="checkbox"/>	Sam Wayne		veganworld

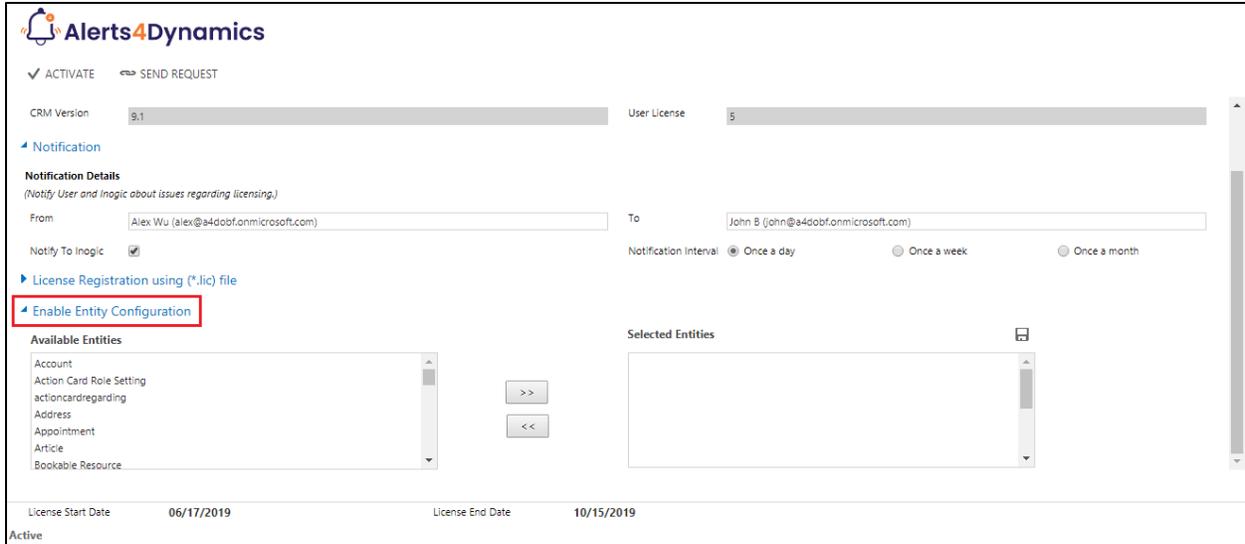
- Click on any one of the security roles --> Click **OK**.



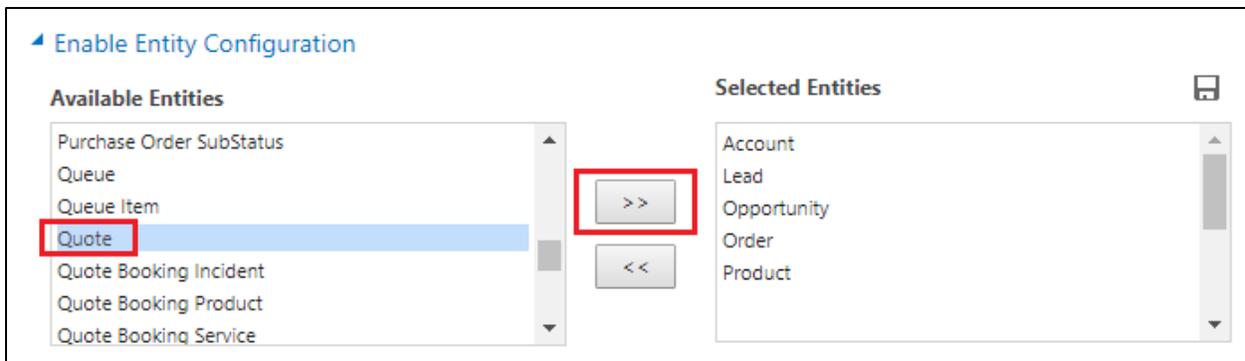
Entity Configuration

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

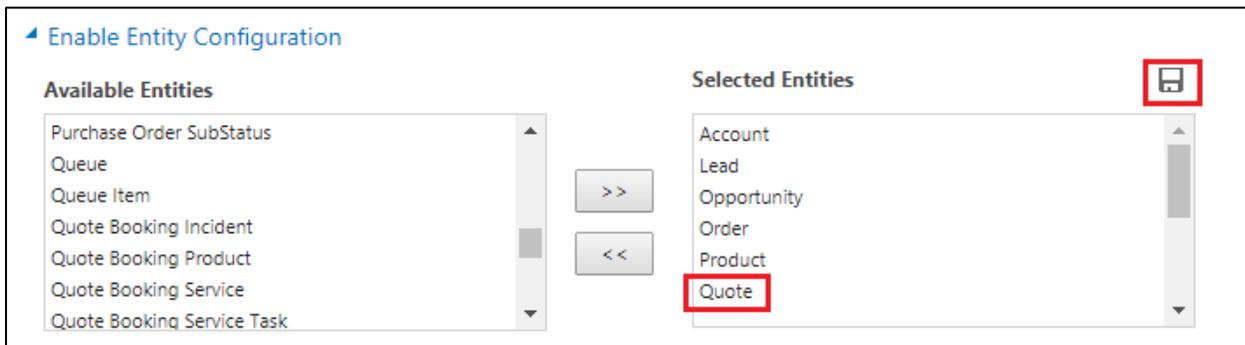
1. To enable Entity Configuration navigate to **Alerts4Dynamics App** → **License Registration** → **Enable Entity Configuration**



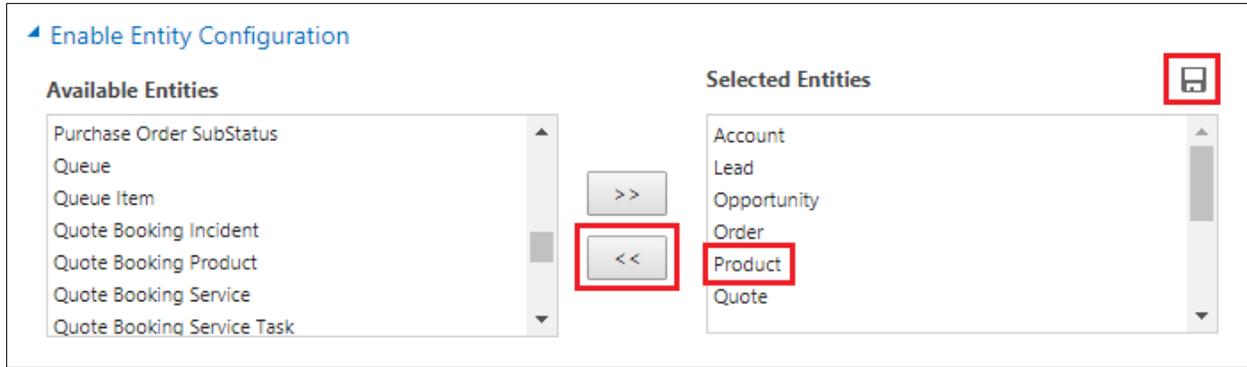
2. Users can select the entities from the list of **Available Entities** and move them to the list **Selected Entities**.



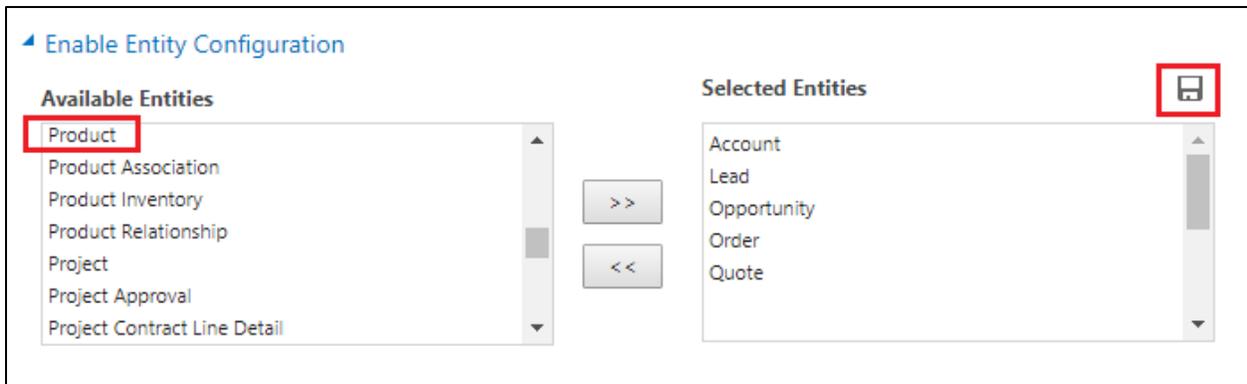
3. Click on **Save** button to enable Entity Configurations for these selected entities.



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.

Entity Name	Entity Display Name	Created On
quote	Quote	10/25/2022 10:41 AM
invoice	Invoice	9/5/2022 3:34 PM
salesorder	Order	9/5/2022 11:45 AM
opportunity	Opportunity	9/5/2022 11:45 AM
lead	Lead	9/5/2022 11:44 AM
contact	Contact	9/5/2022 11:44 AM
account	Account	9/5/2022 11:44 AM

Alerts

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

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

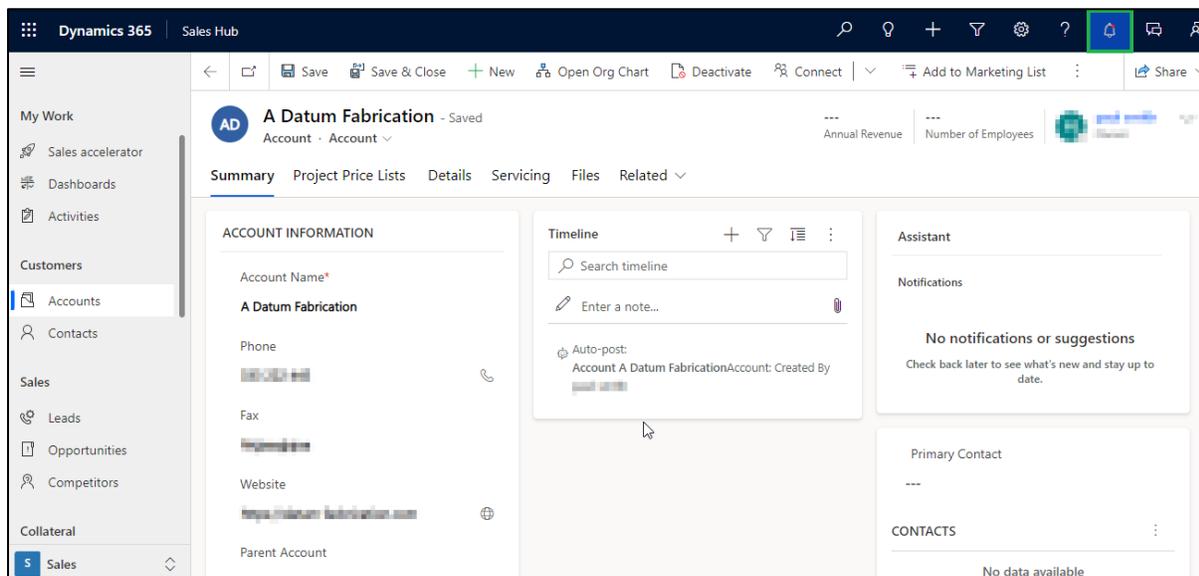
Display of Alerts

Alerts4Dynamics app displays Alert in the following three ways:

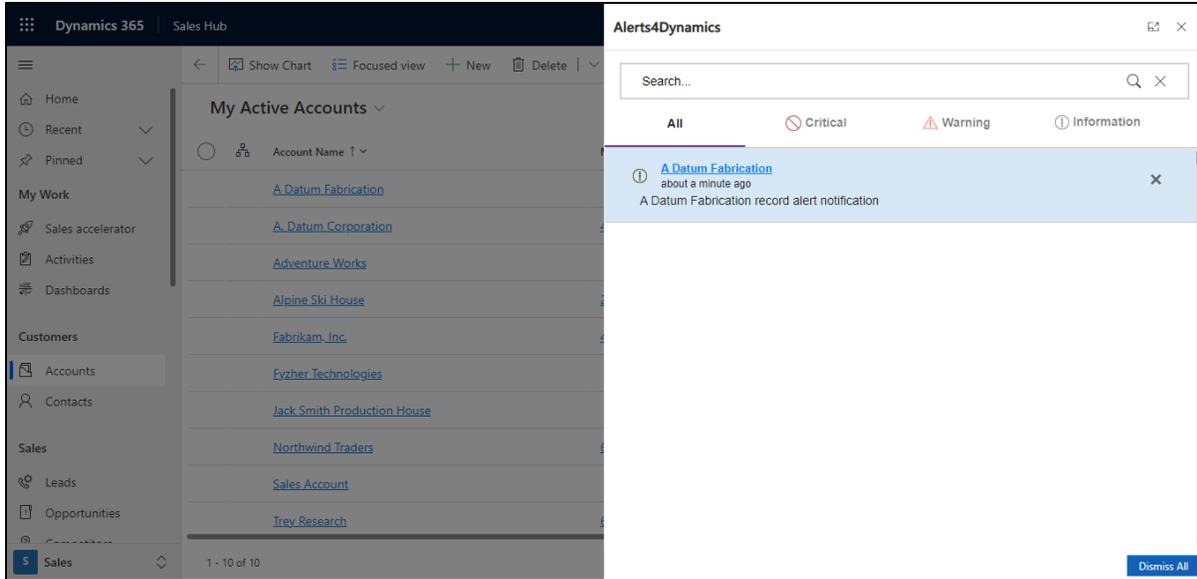
- Pop-ups
- Form Notifications – Dialog & Bar
- Email Notifications

Alert as Pop up:

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

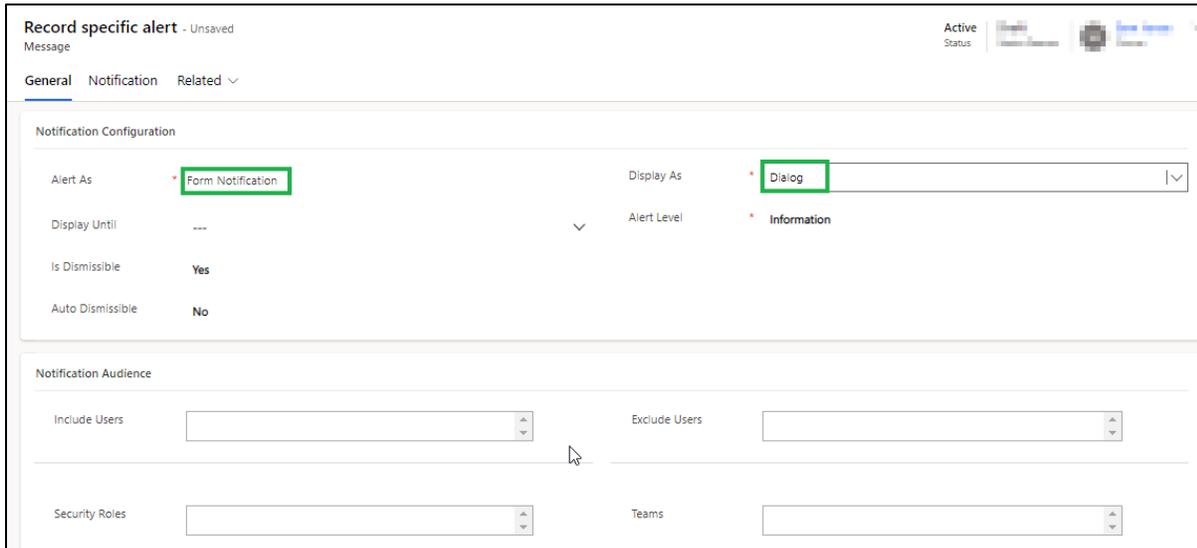


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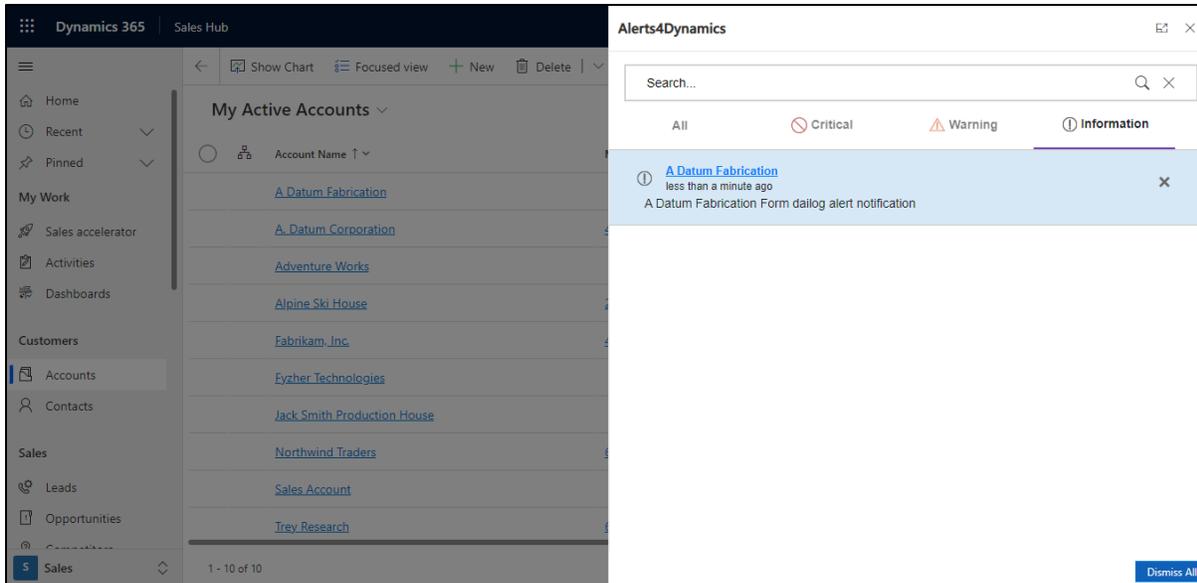


Alert as Form notification – Dialog

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.

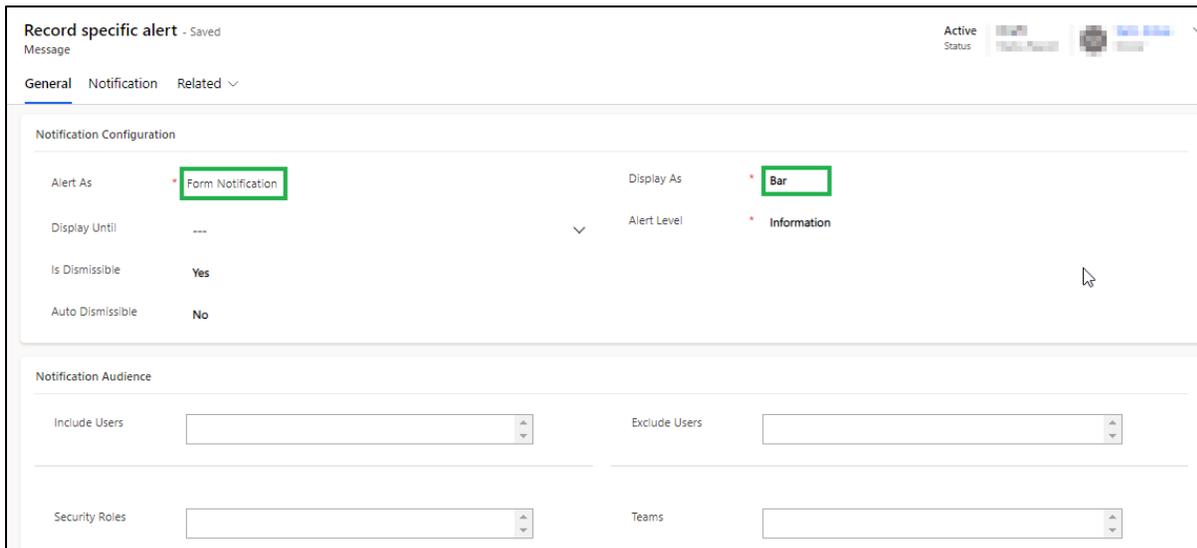


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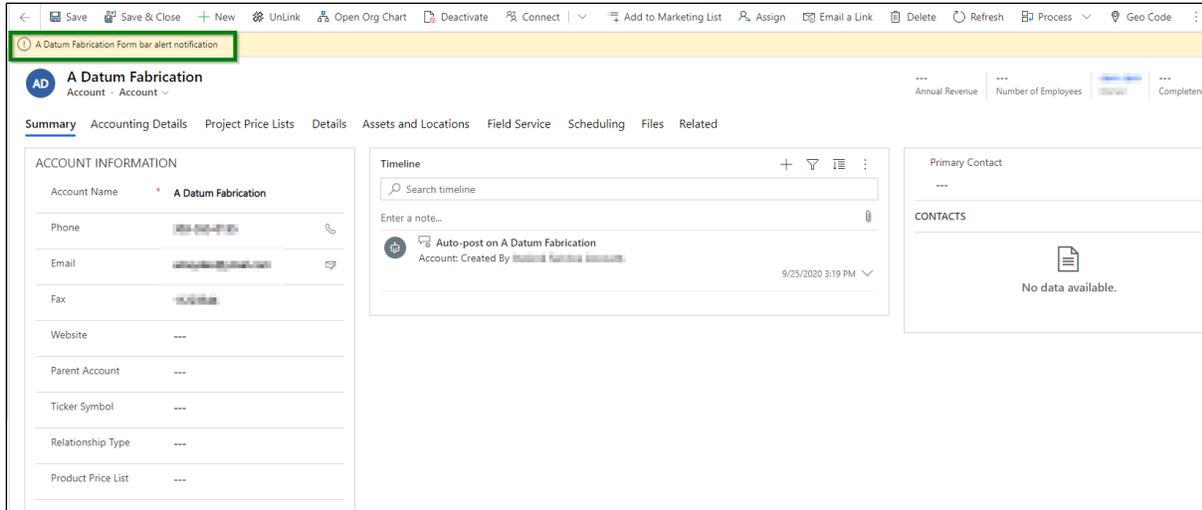


Alert as Form notification – Bar

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.



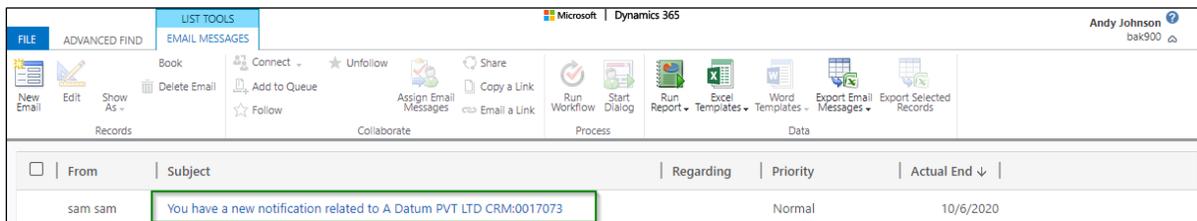
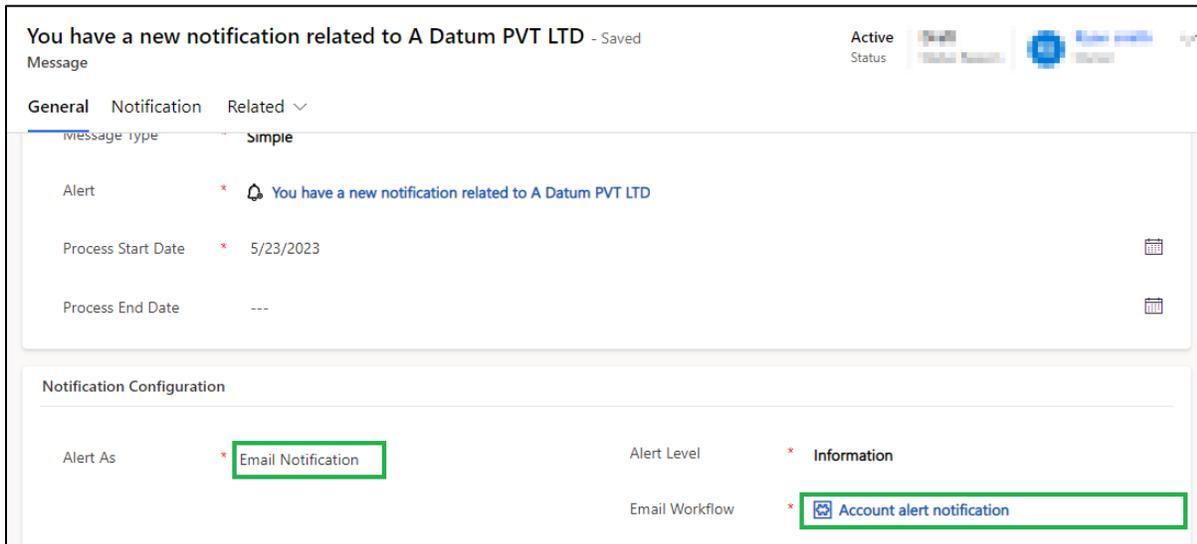
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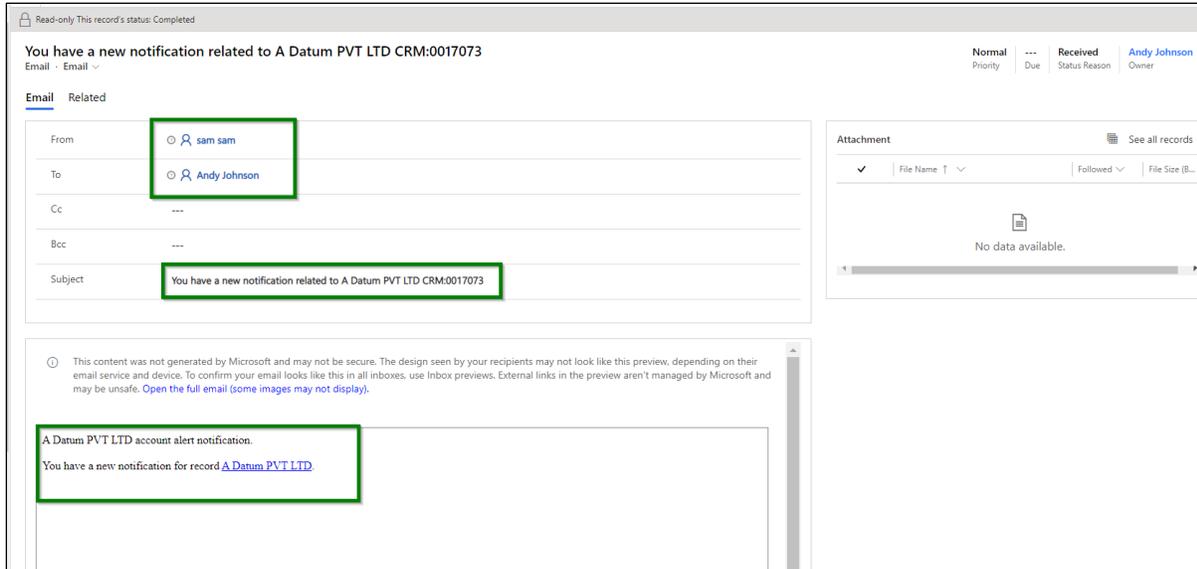


Note: An alert will be displayed through the global notification bell button only if checked from within the context of the record.

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:

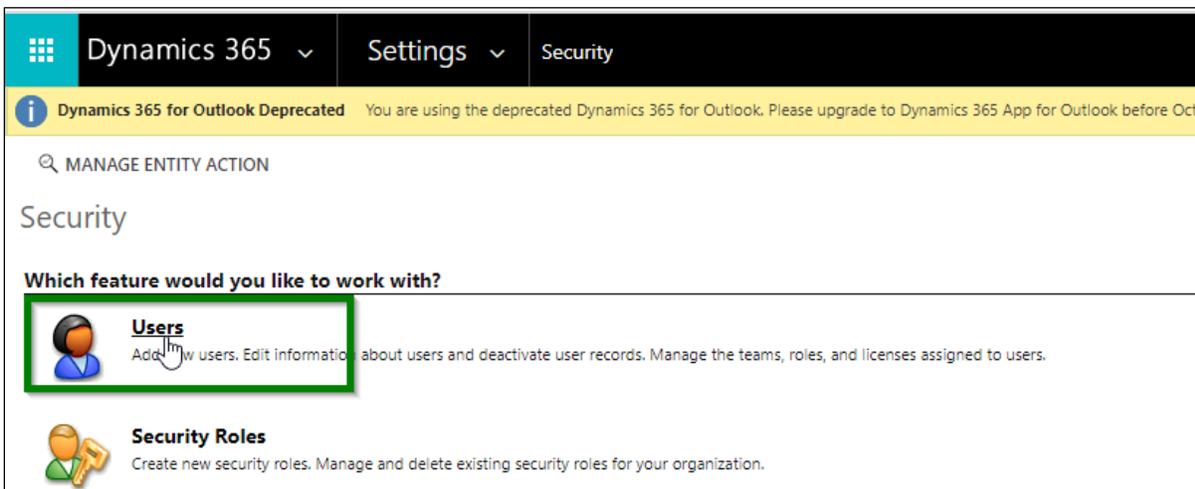
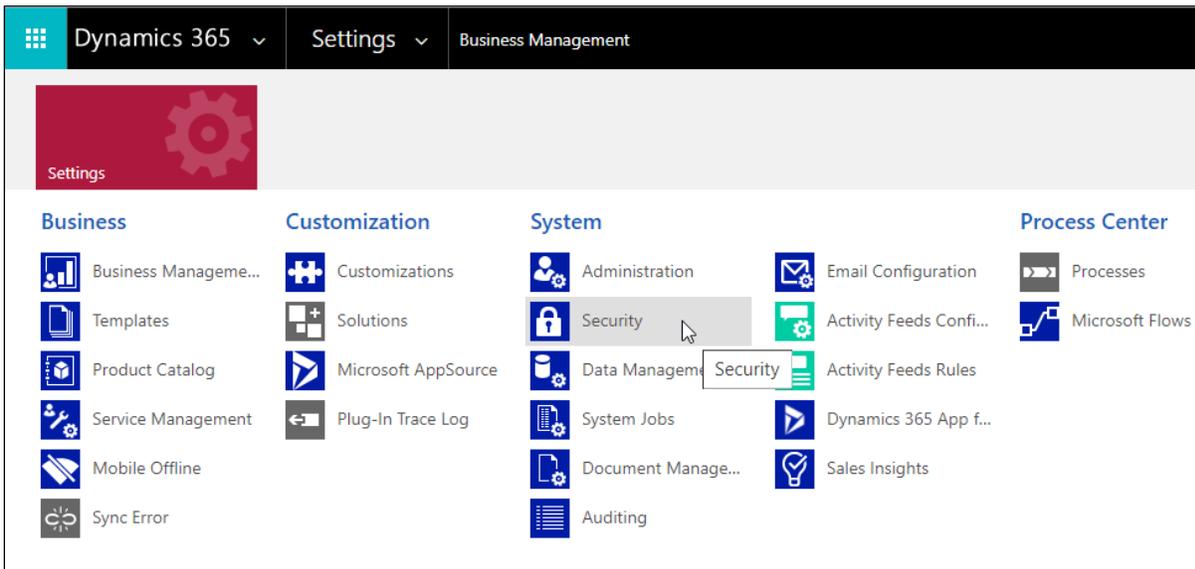
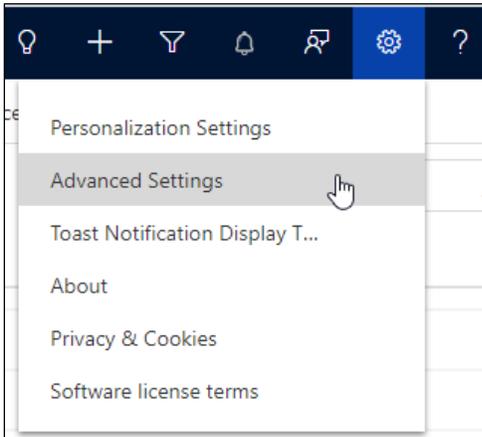
Admin will not be able to see an alert since an alert is configured as only **'User Preference'** and admin did not set any preference to receive an alert.

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**.



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

USER ▾
Andy Johnson ☰

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

▸ Details
▾ Alerts4Dynamics

Alert As

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

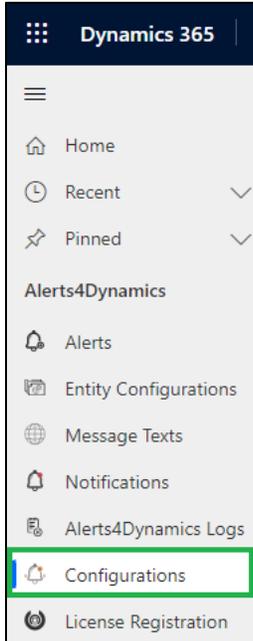
USER ▾
John Shaw ☰

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

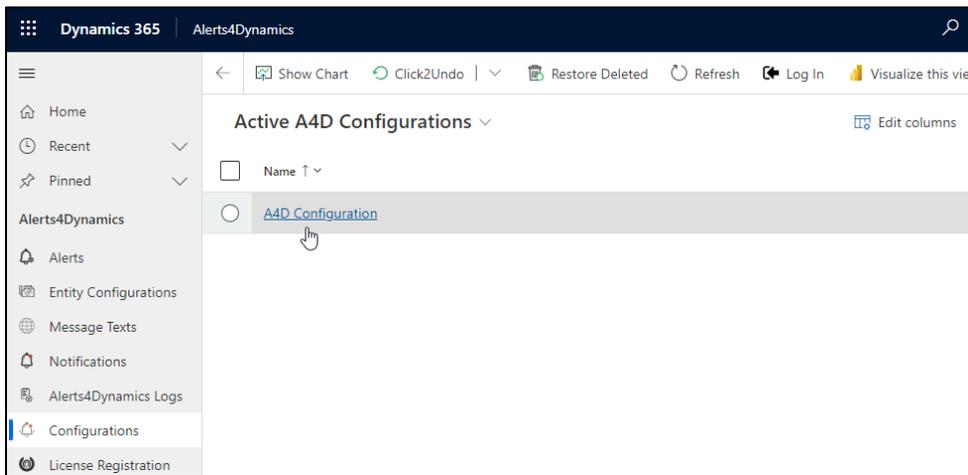
▸ Details
▾ Alerts4Dynamics

Alert As

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

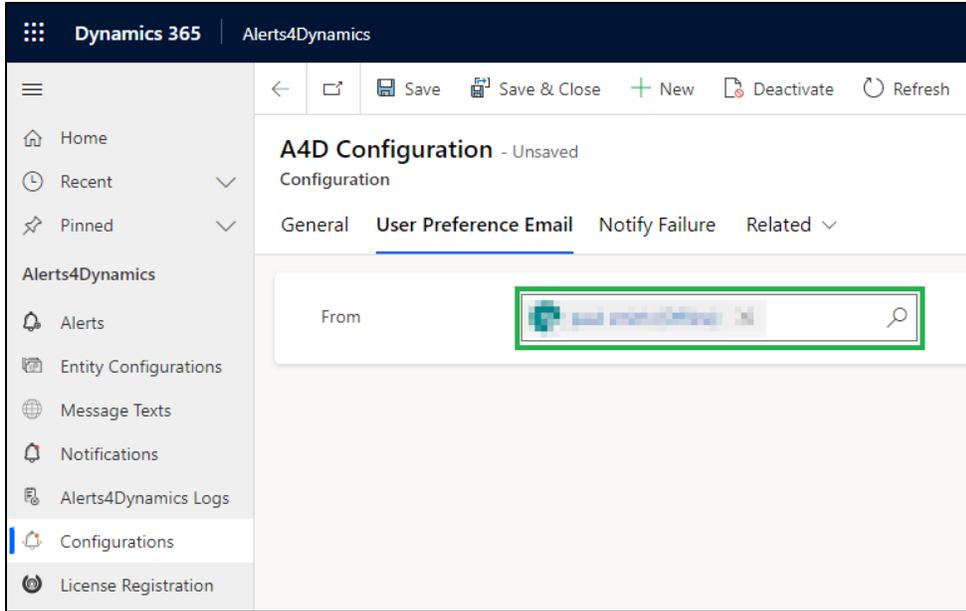


- Open the configuration record.

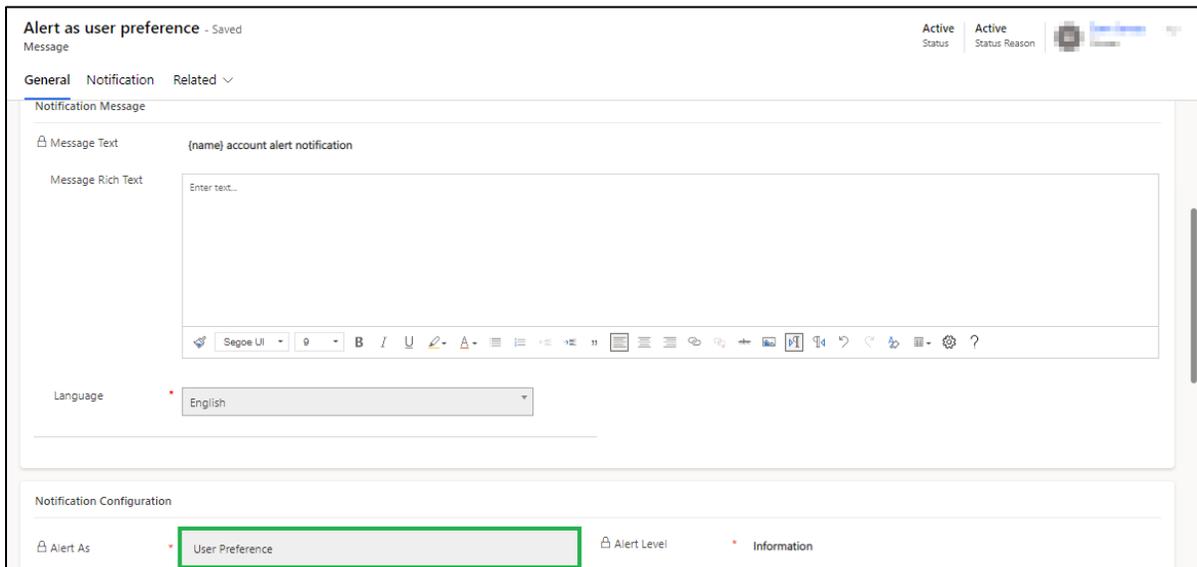


- Select the user (this is the user from whom an alert will be sent via email to that user who has preference to receive an alert set as 'Email Notification').

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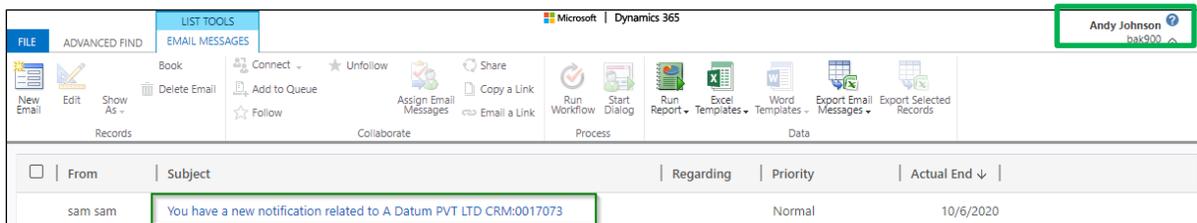


7) Configure and activate the message.



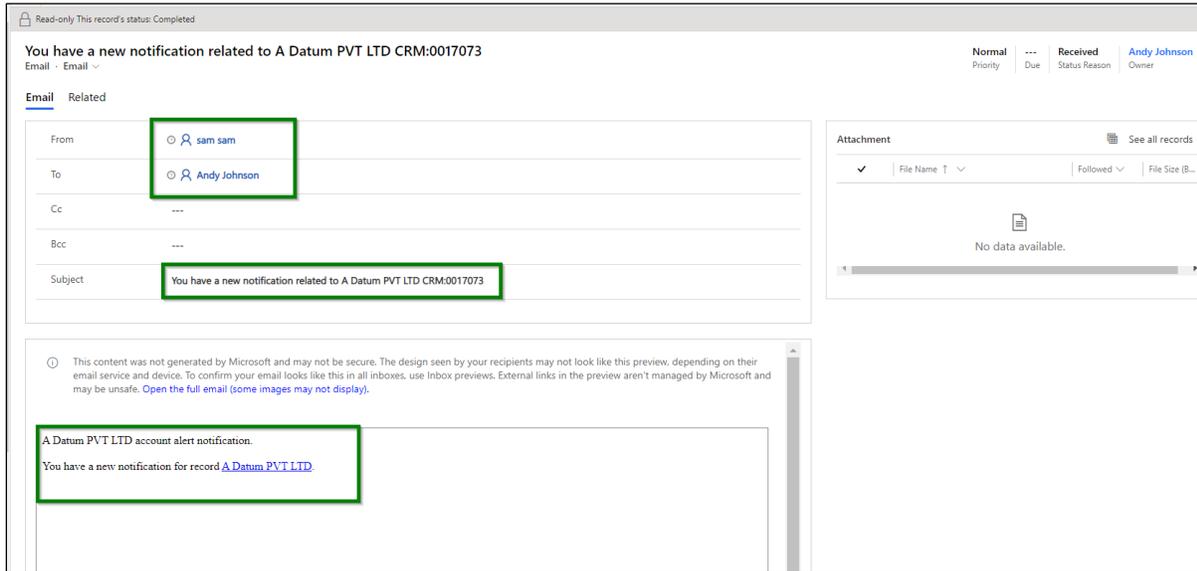
8) Once the message is activated:

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

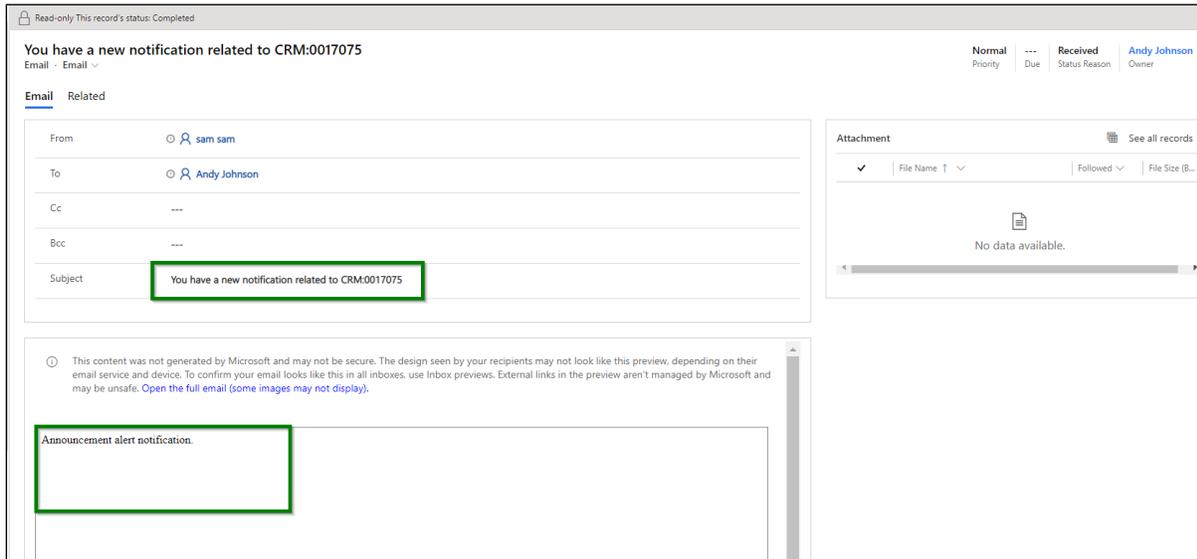


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The user will be directed to the record page by clicking on the record link available in the email body.

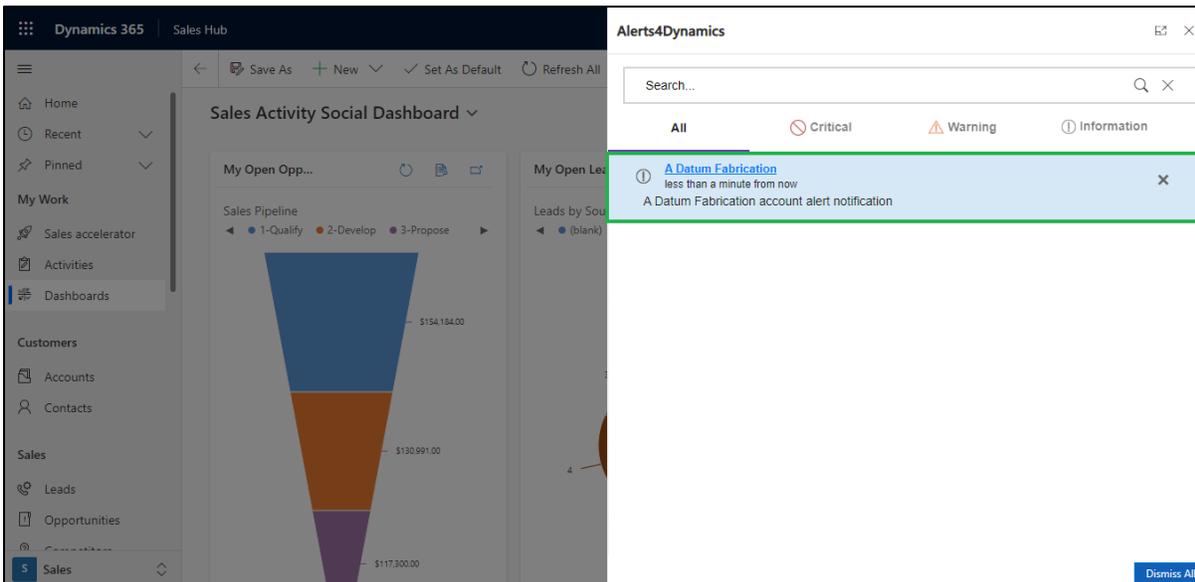
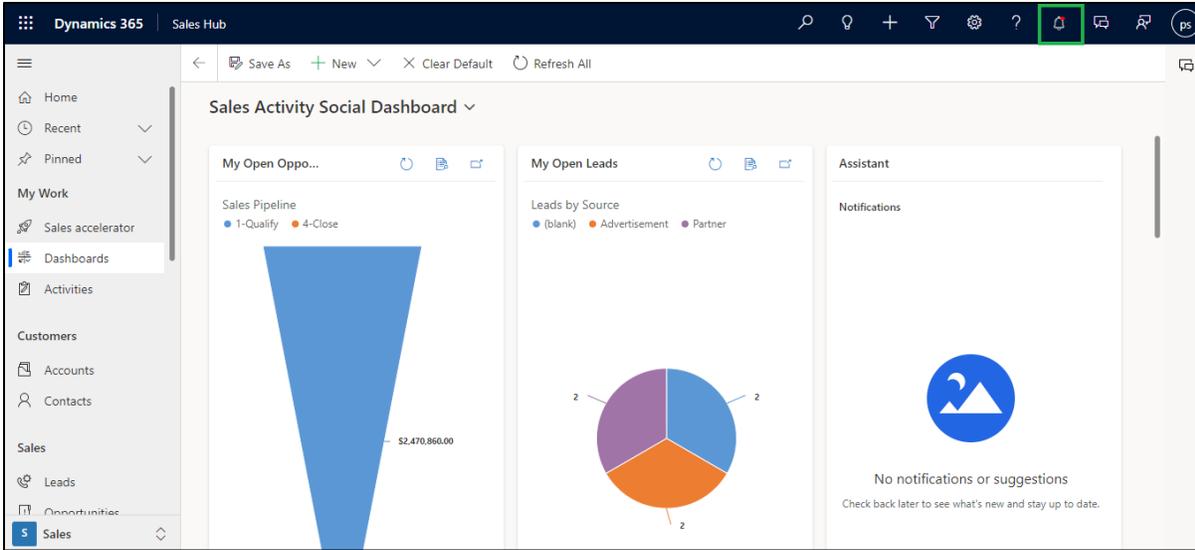


In case of an announcement alert being sent through an email, there will be no such link since announcements are not record specific.



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

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Scenario 2:

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

Admin – No preference

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

User 1 – Email Notification

User 2 – Pop up

Outcome:

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

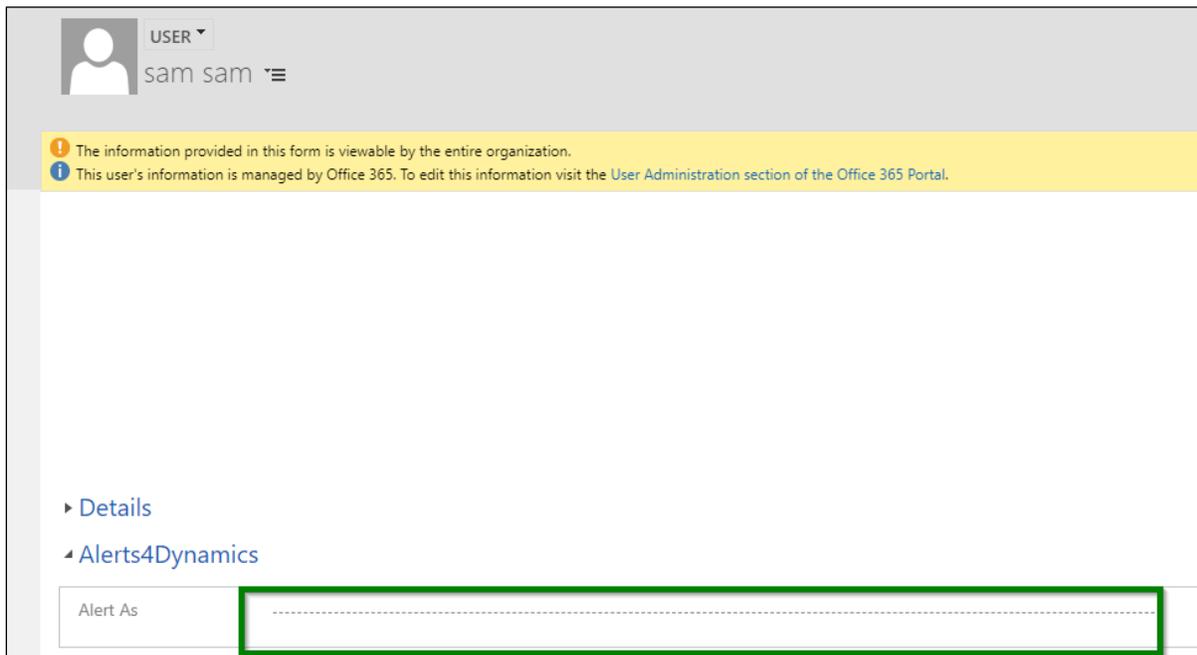
User 1 will receive an alert through an **'Email'** as well as **'Form Notification – Dialog'**.

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

Steps to set User Preference

- 1) Set individual user preferences for an alert.

Admin – No preference:



The screenshot shows a user interface for setting preferences. At the top, there is a header with a user icon, the word 'USER', and the name 'sam sam'. Below the header is a yellow warning banner with two messages: 'The information provided in this form is viewable by the entire organization.' and 'This user's information is managed by Office 365. To edit this information visit the User Administration section of the Office 365 Portal.' Below the banner, there are two expandable sections: 'Details' and 'Alerts4Dynamics'. The 'Alerts4Dynamics' section is expanded, showing a form with a label 'Alert As' and a text input field. The input field is currently empty and has a dashed line indicating it is a text field. The input field is highlighted with a green border.

User 1 – Email Notification:

USER ▾
Andy Johnson ☰

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▸ Details
▾ Alerts4Dynamics

Alert As: Email Notification

User 2 – Pop up:

USER ▾
John Shaw ☰

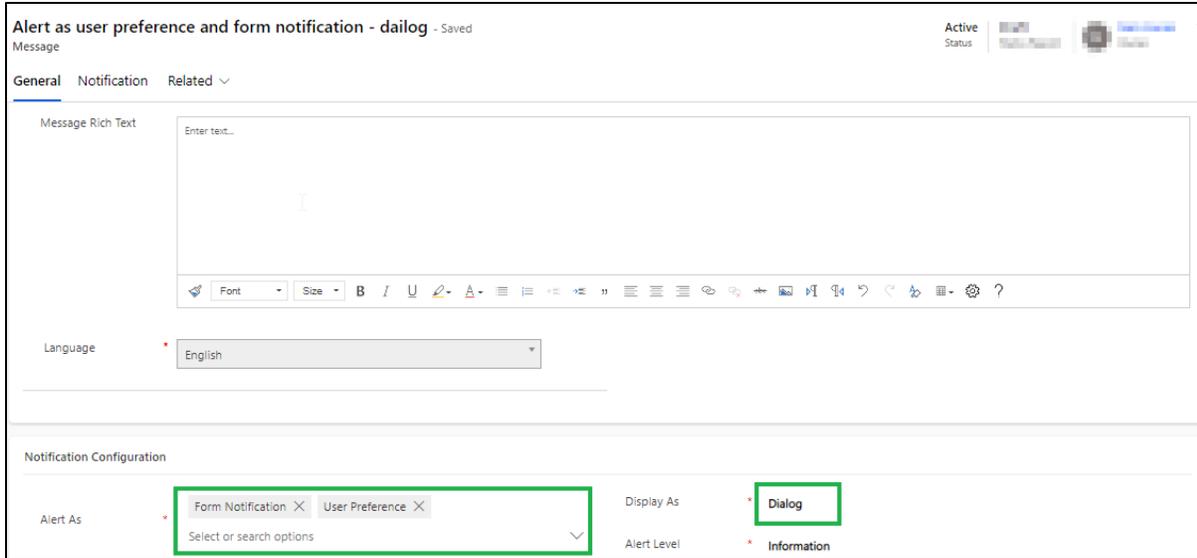
! The information provided in this form is viewable by the entire organization.
i This user's information is managed by Office 365. To edit this information visit the [User Administration](#) section of the Office 365 Portal.

▸ Details
▾ Alerts4Dynamics

Alert As: Pop-Up

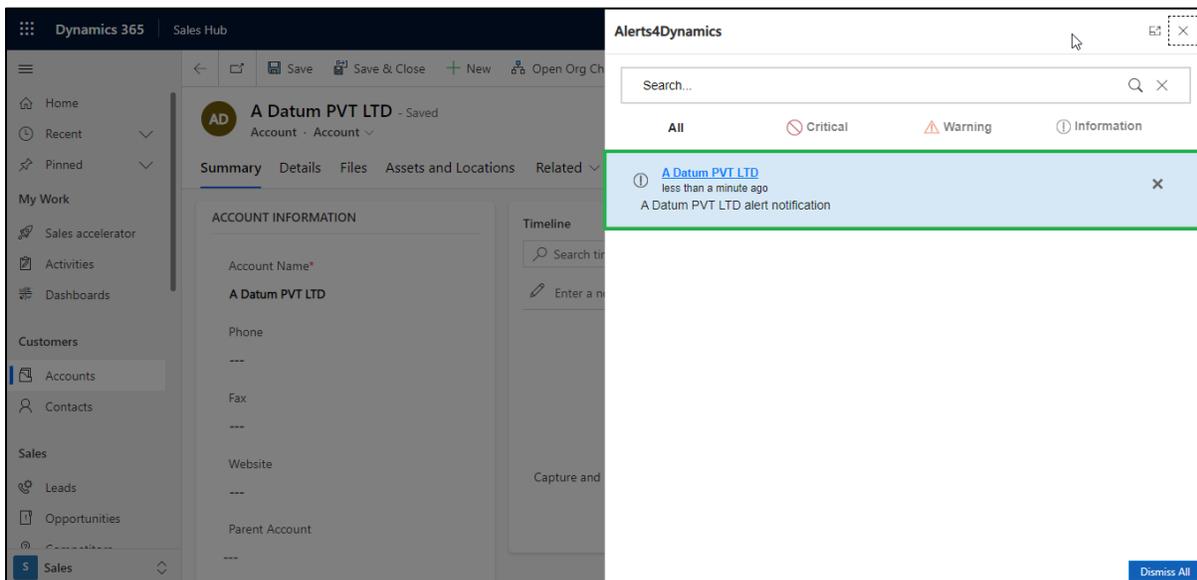
2) Configure the alert message.

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3) Once the message is activated;

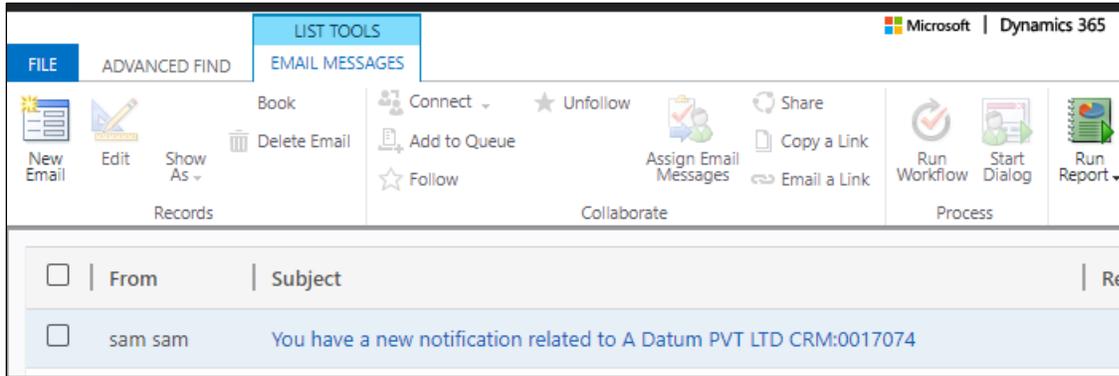
Admin will be able to see an alert only as a **Form Dialog**.



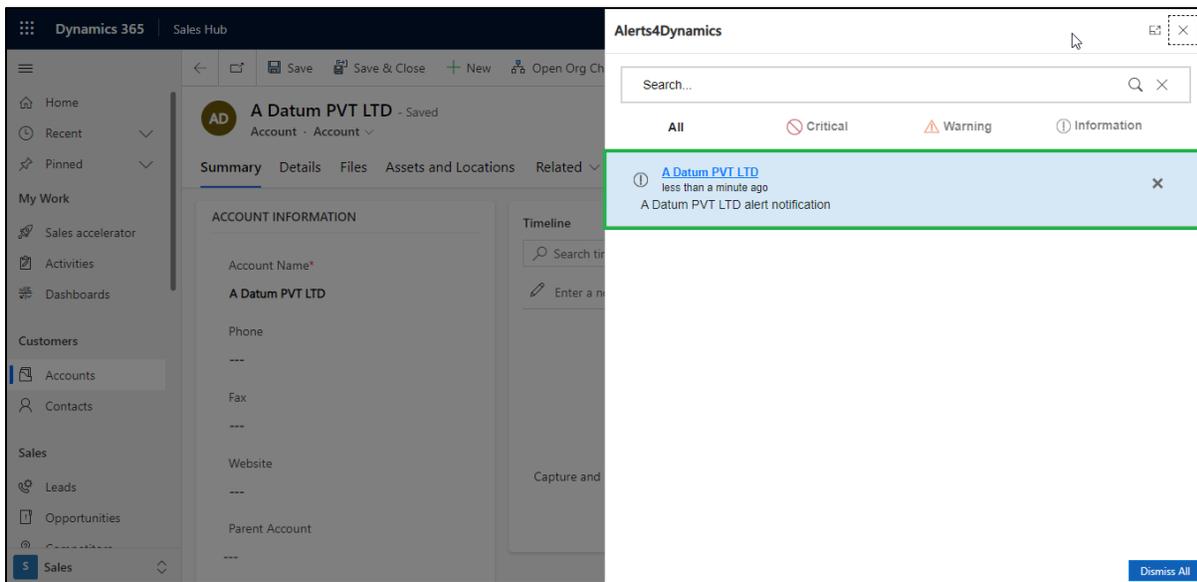
User 1 will be notified through both **Email** as well as **Form Dialog**.

As Email Notification:

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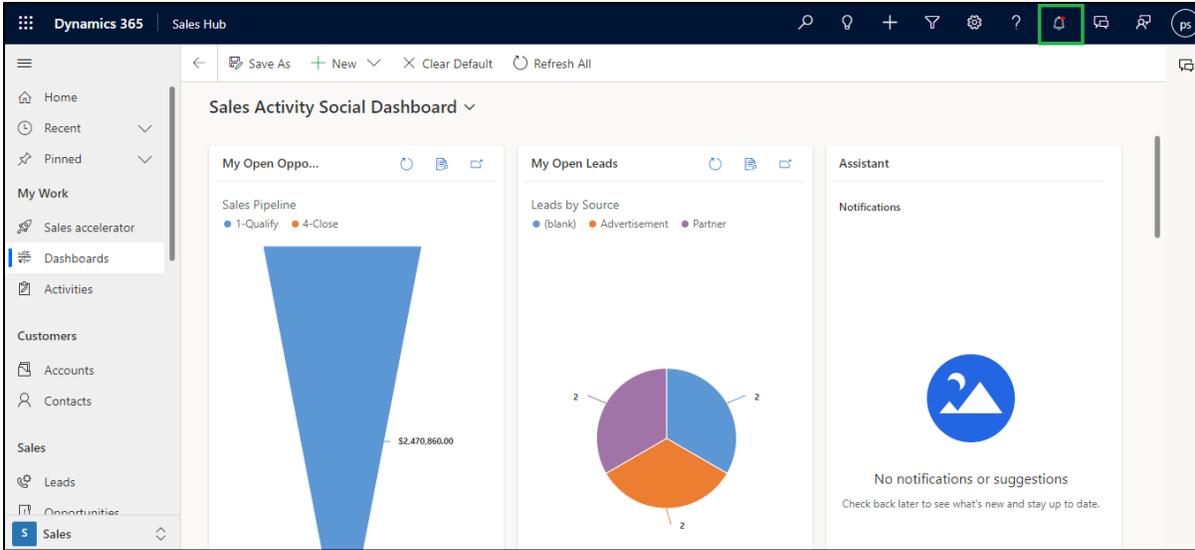
As Form Dialog:



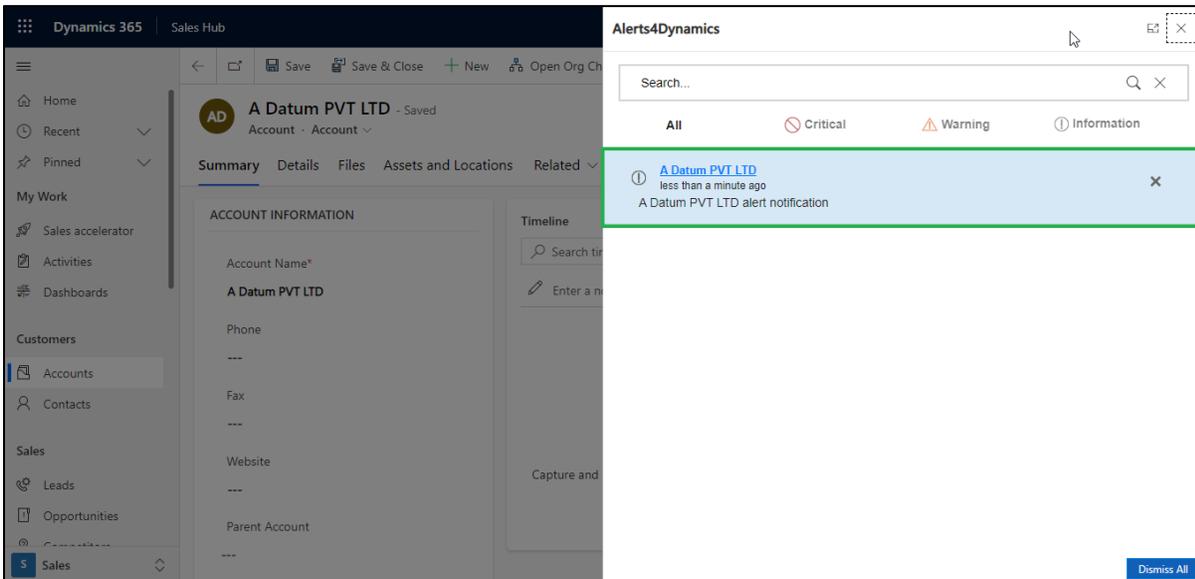
User 2 will be able to see an alert both as **Pop up** and **Form Dialog**.

As Pop up:

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As Form Dialog:



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

New Message Active Status | New Status Reason

General | Notification

Name * **Alert**

Message Type * **Simple**

Alert * **Rule based alert**

Process Start Date * 10/6/2020

Process End Date * ---

Notification Configuration

Alert As * **Email Notification, User Preference**

Alert Level * **Information**

Email Workflow * **ActivityPropagation**

Email Notification and User Preference cannot be selected together.

Reason:

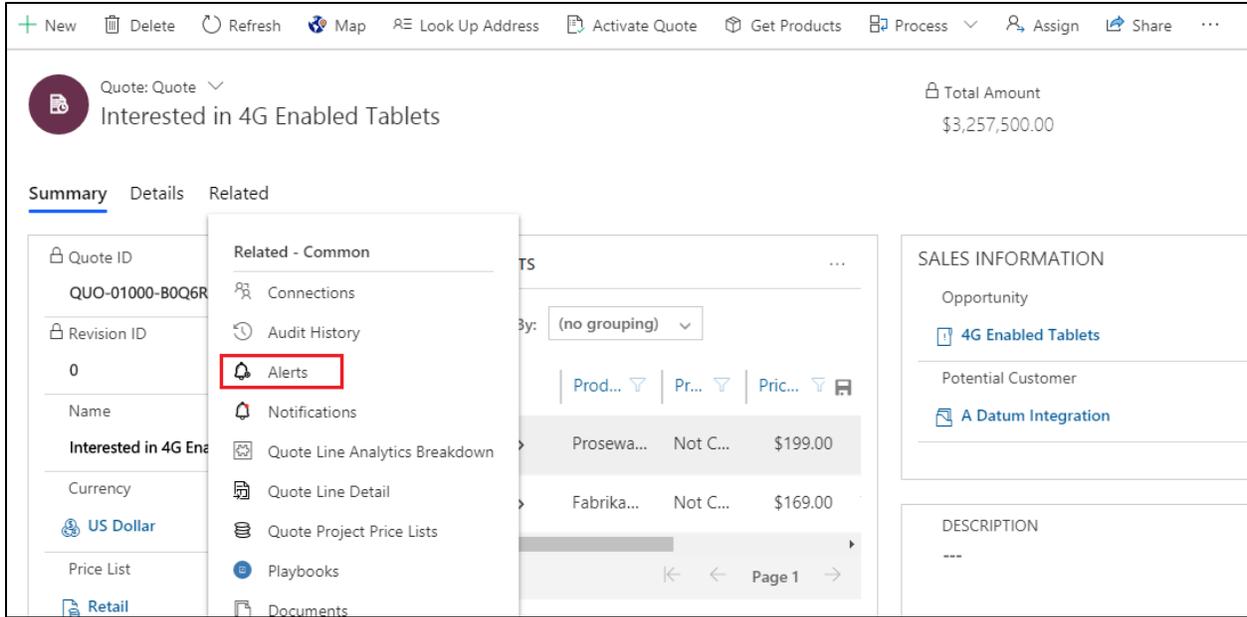
User is required to create a workflow for alert as **'Email Notification'** where they will decide which of the users to be picked as an audience of this email notification. In addition to this, no separate notification is created for an alert as **'Email Notification'**, it would be sent directly as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

Record Based Alerts

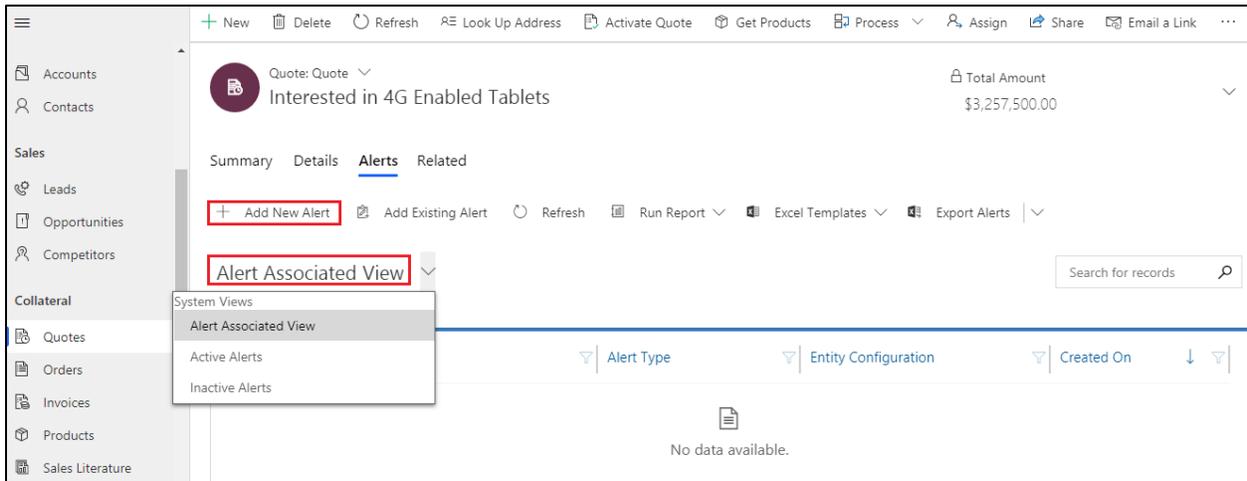
Record Based alerts are created for individual records. For instance, if a Quote is about to expire then an alert for that Quote can be created or if an Invoice is due then an alert for that specific Invoice can be created.

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**.

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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).

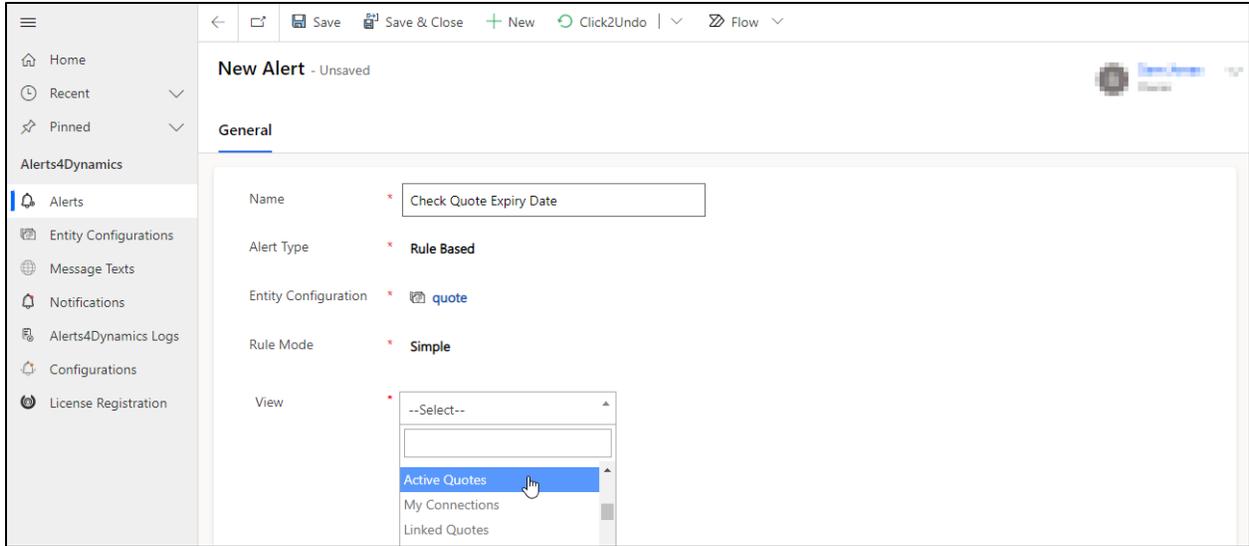
To create Rule Based alerts go to **Alerts4Dynamics App** → **Alerts** → **New** and set the **Alert Type** as **Rule Based**. Select the **Rule Mode** as **Simple** or **Advanced**.

Fill the fields:

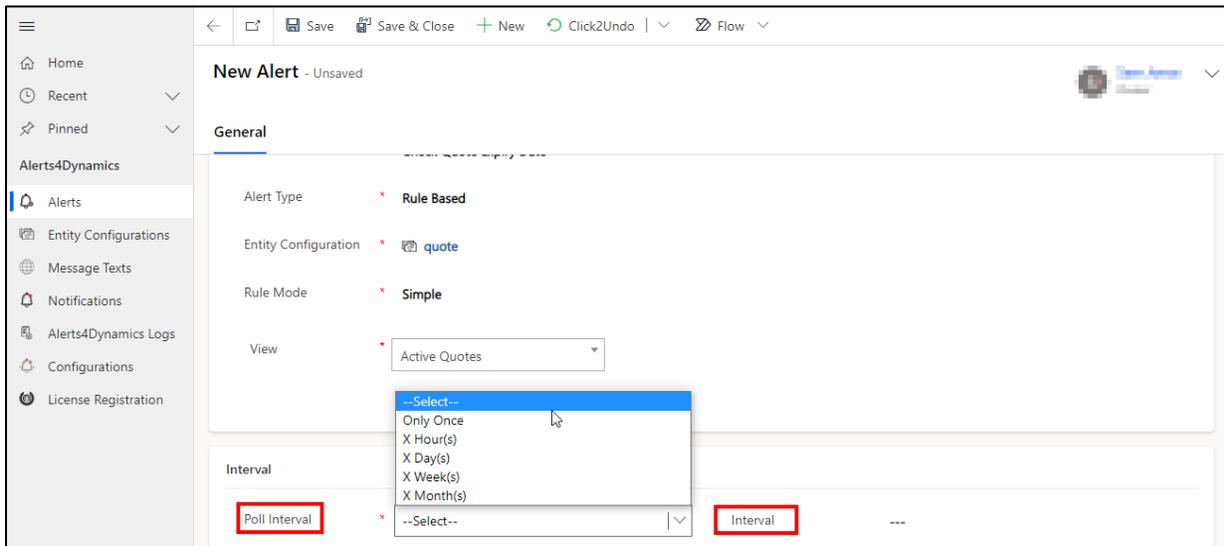
- a) **Name:** Enter a suitable name for this Alert.
- b) **Alert Type:** Select the type of alert you are creating. Here you have the option to choose **Rule Based** or **Announcement**. Select **Rule Based** from the dropdown.
- c) **Entity Configuration:** Select the Entity Configuration.
- d) **Rule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

Simple Alerts

- a) Simple alerts are rule-based alerts created based on **System Views** related to the entity whose Entity Configuration has been selected. Select the **View** for which Alert has to be created.



b) Select the Interval:

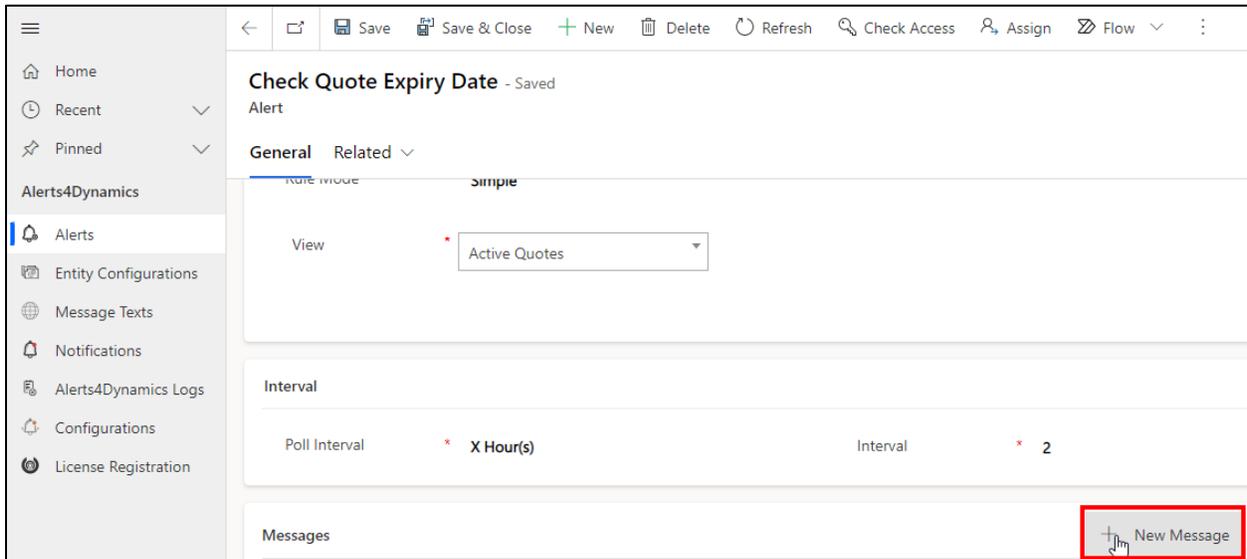


- **Poll Interval:** This is the duration after which the system checks if any new record has been created based on the condition provided. (In above case, based on the condition of the selected view.)

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

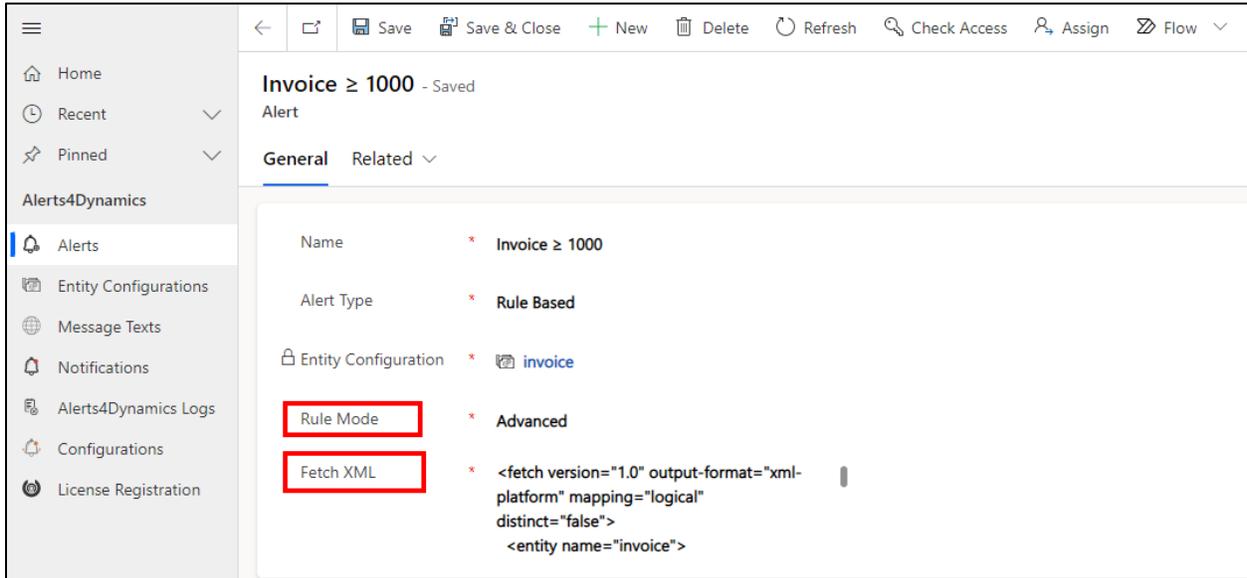
Alerts can be created based on conditions.

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.

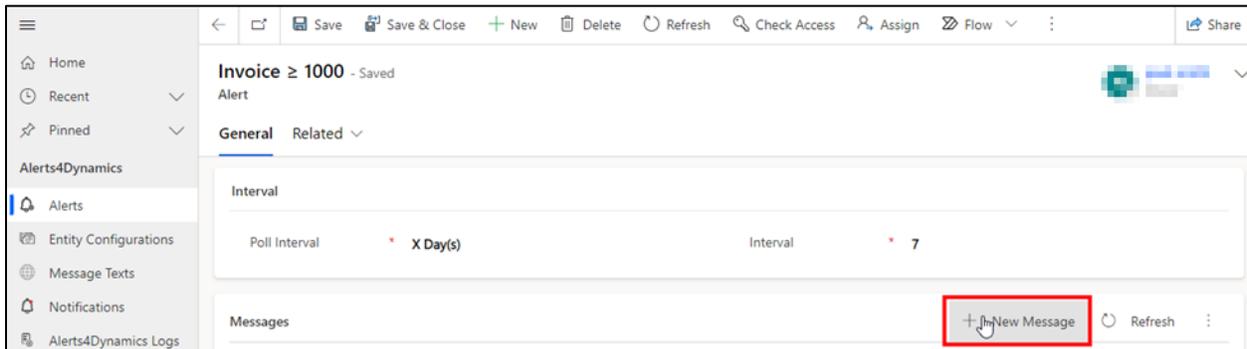
```
<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">
  <entity name="invoice">
    <attribute name="name" />
    <attribute name="customerid" />
    <attribute name="statuscode" />
    <attribute name="totalamount" />
    <attribute name="invoiceid" />
    <order attribute="name" descending="false" />
    <filter type="and">
      <condition attribute="totalamount" operator="ge" value="1000" />
    </filter>
  </entity>
</fetch>
```

</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.



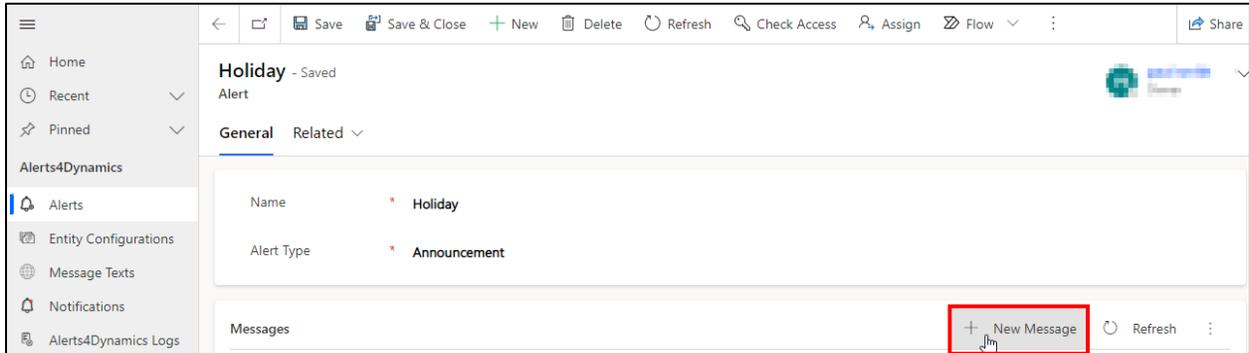
Announcement

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.

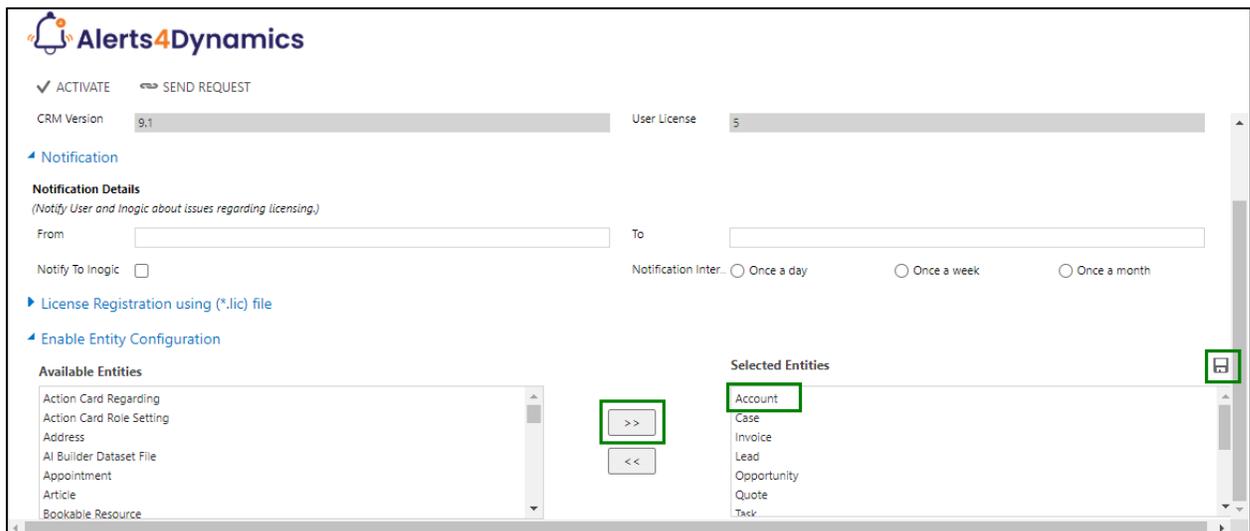


Event Based Alerts

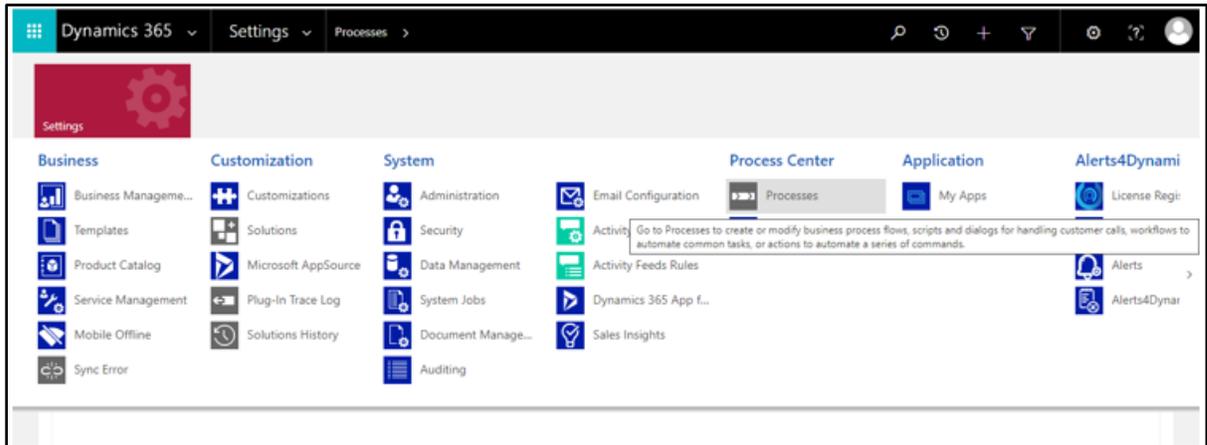
Alerts4Dynamics gives user a provision to show an alert with respect to any event that happens in the CRM. For example, user wants an alert to be shown automatically once a new record is created within the selected entity. This can now be easily achieved using ‘**Event Based Alert**’ feature of Alerts4Dynamics.

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**.

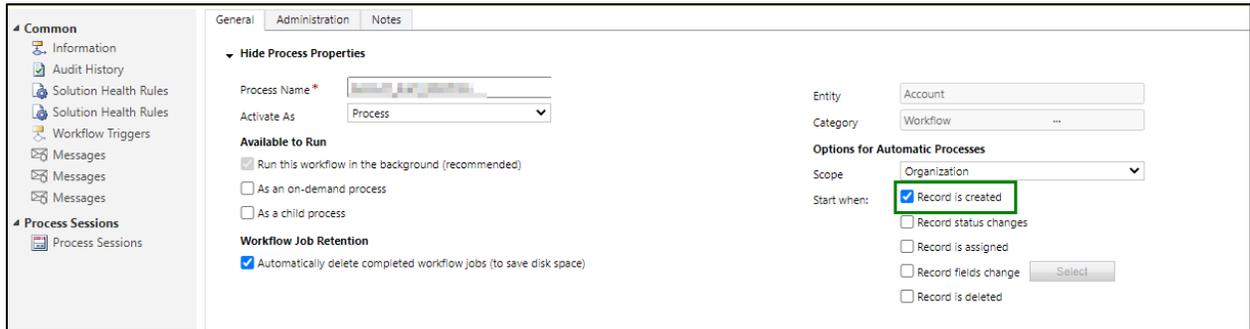
- Enter a relevant name for the process
- Select the category as **'Workflow'** and Entity as **'Account'**.

The 'Create Process' dialog box is shown. It contains the following fields and options:

- Process name:** * on creation of new record
- Category:** * Workflow (highlighted with a green box)
- Entity:** * Account (highlighted with a green box)
- Run this workflow in the background (recommended)
- A yellow banner message: "We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!"
- Type:**
 - New blank process
 - New process from an existing template (select from list):
- A table with columns: Template Name ↑, Primary Entity, and Ow.
- A 'Properties' button.
- Buttons for 'OK' (highlighted with a green box) and 'Cancel'.

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

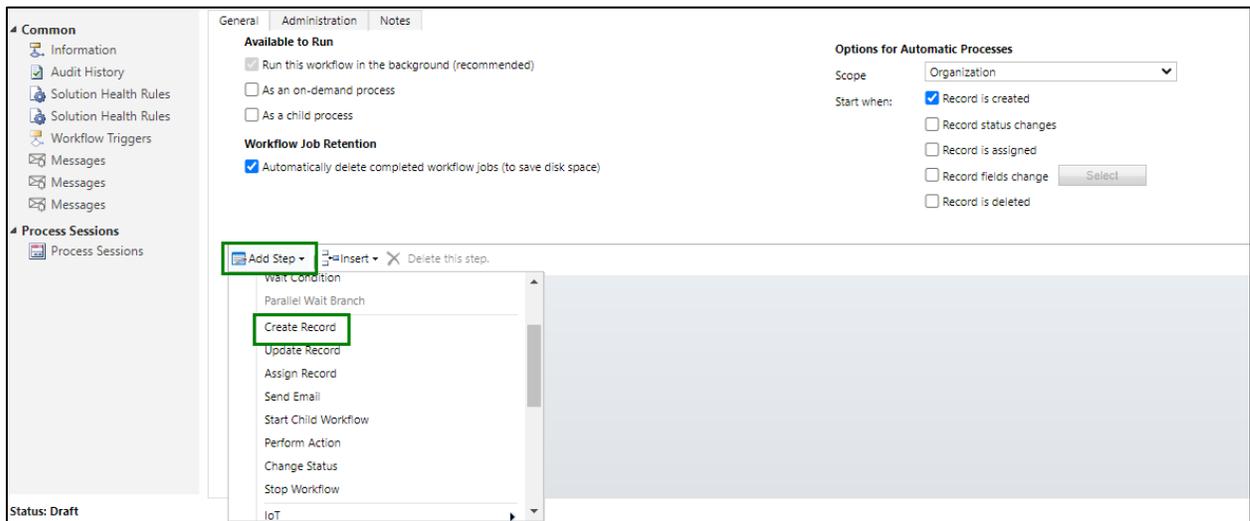
We are selecting **'Record is created'** checkbox since we want an alert to be displayed for the record that is newly created in the system.



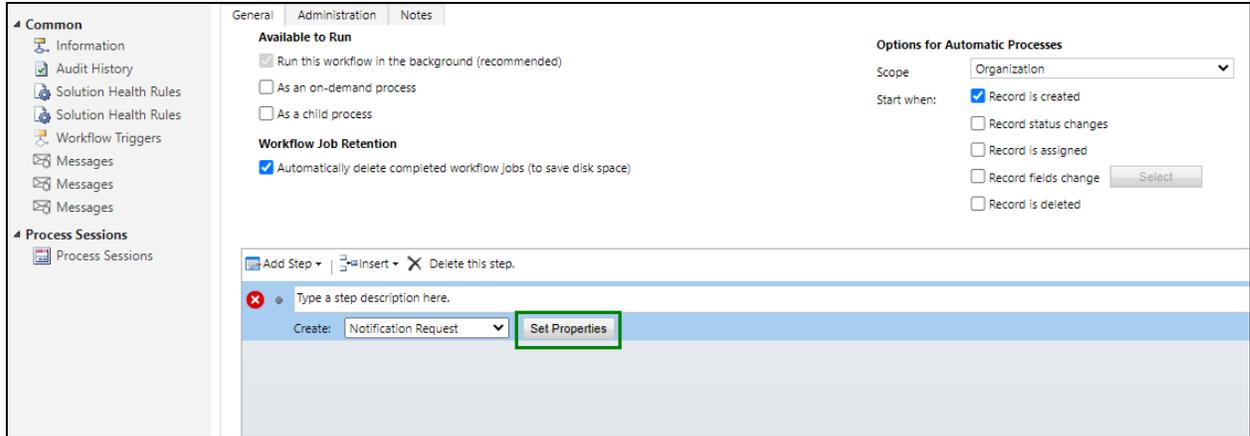
5) For creating notification you need to create a record of **'Notification Request'** entity which is custom entity shipped along with the solution.

Please follow the below steps for creating notification request entity record.

Select Add Step → Create Record → Select 'Notification Request' from the dropdown.

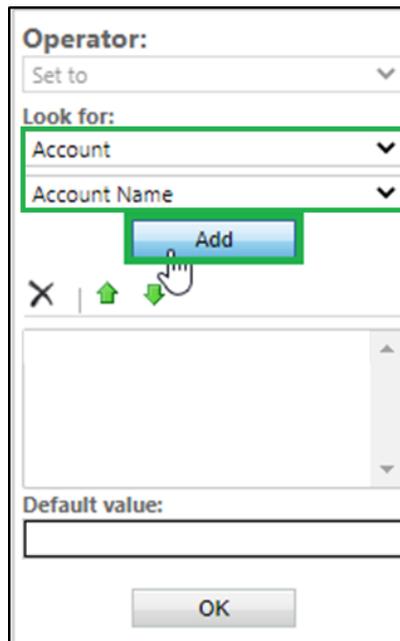


6) Click on **'Set Properties'**. Here, you will find similar fields necessary for configuration as we do in other types of alerts.



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).



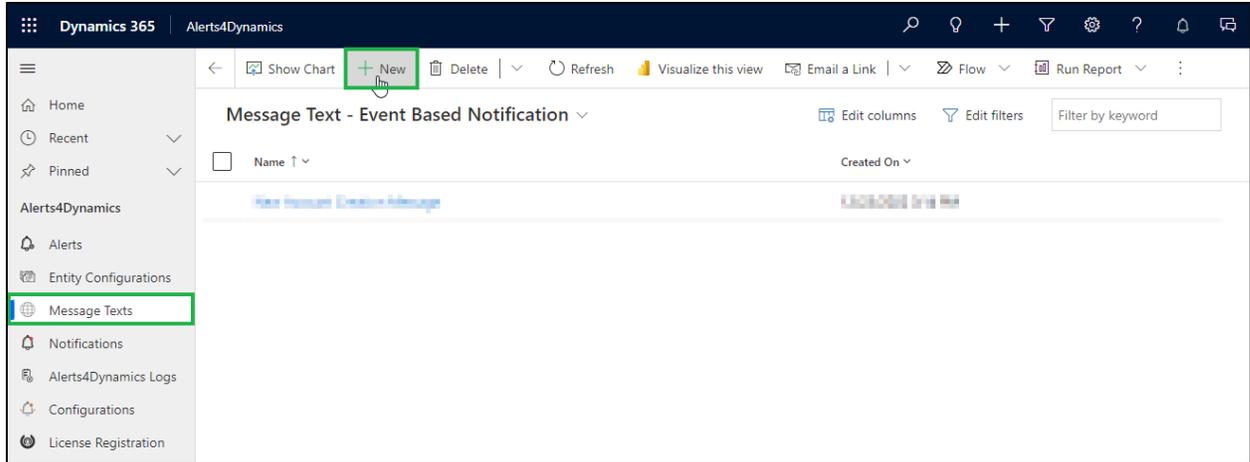
8) Select the above field and click on '**Add**' button to add it in the Message Text field. Click **Ok**. You will see the dynamic value is set to the '**Message Text**' field. Similarly add Dynamic values in '**Name**' field.

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.

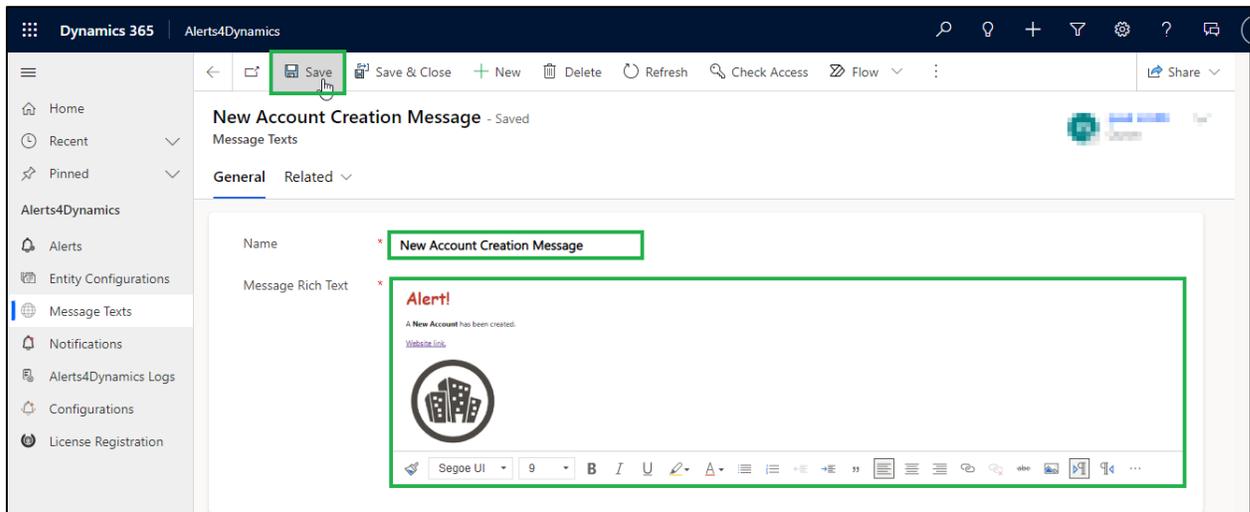
To create and add **Message Text** in the **Message Rich Text** field for an **Event-Based Alert** follow the steps given below:

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

Alerts4Dynamics – User Manual



- 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.

File Save and Close

Process: on creation of new record
Create Notification Request

Notification Settings

Name * [Account Name(Account)] (Created On(Account))

Message Text [Account Name(Account)] is newly created

Message Rich Text **New Account Creation Message**

Alert As

Pop-Up No Yes Email Notification No Yes

Form Notification No Yes Is Dismissible No Yes

Display As [dropdown] User Preference No Yes

Alert Level * [dropdown]

Display Until [text field]

Regarding [Account(Account)]

Notification Associated With * [text field]

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'.

Alerts4Dynamics – User Manual

File Save and Close

Process: on creation of new record
Create Notification Request

Notification Settings

Name * [Account Name(Account)] (Created On(Account))

Message Text [Account Name(Account)] is newly created

Message Rich Text [New Account Creation Message]

Alert As

Pop-Up No Yes Email Notification No Yes

Form Notification No Yes Is Dismissible No Yes

Display As [User Preference] No Yes

Alert Level * Information

Display Until

Regarding [Account(Account)]

Notification Associated With [Record URL(Dynamic)(Account)]

Audience Settings

Form Assistant

Dynamic Values

Operator: Set to [Account] Look for: Account Record URL(Dynamic)(Account) Add

Record URL(Dynamic)(Account)

Default value:

OK

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.

Audience Settings

Notification Audiences

Include Users [Owning User(Account)] (Manager(Owning User (User))) Exclude Users John Watson

Team [Owning Team(Account)]

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

File Save and Close Activate Convert to a real-time workflow Show Dependencies Solution Layers Actions

Process: Account_Alert_Workflow Working on solution: Default

Information

We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!

Common

Information Audit History Solution Health Rules Solution Health Rules Workflow Triggers Messages Messages Messages

Process Sessions

Process Sessions

General Administration Notes

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)

Options for Automatic Processes

Scope Organization

Start when: Record is created Record status changes Record is assigned Record fields change Record is deleted

Add Step Insert Delete this step

Create Notification Request Record

Create: Notification Request Set Properties

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

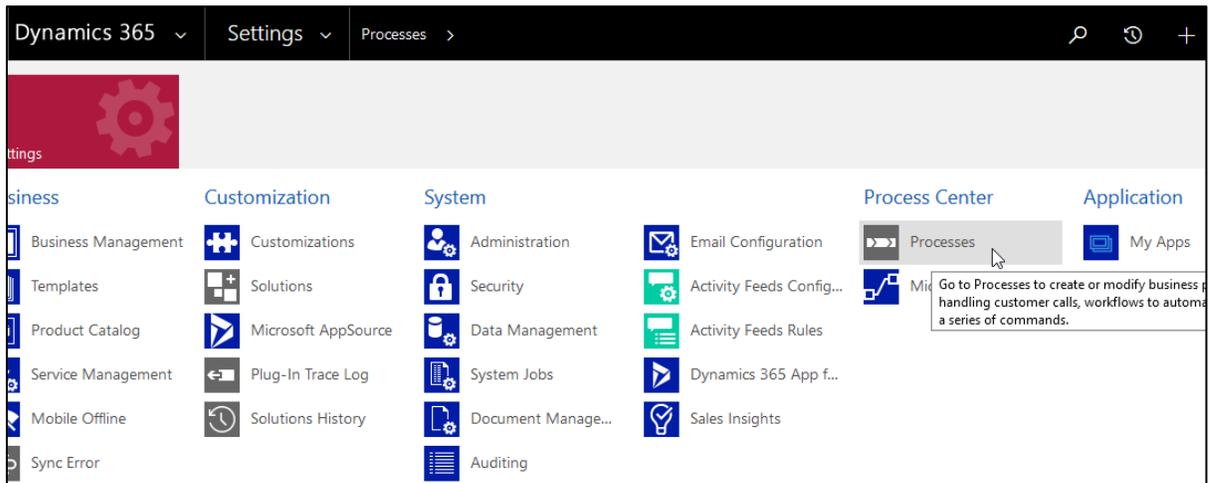
Example 2: Now, let us see how to configure the Event-based alert for the scenarios where the entity on which the notification to be shown is different from the entity where the workflow is triggered and also

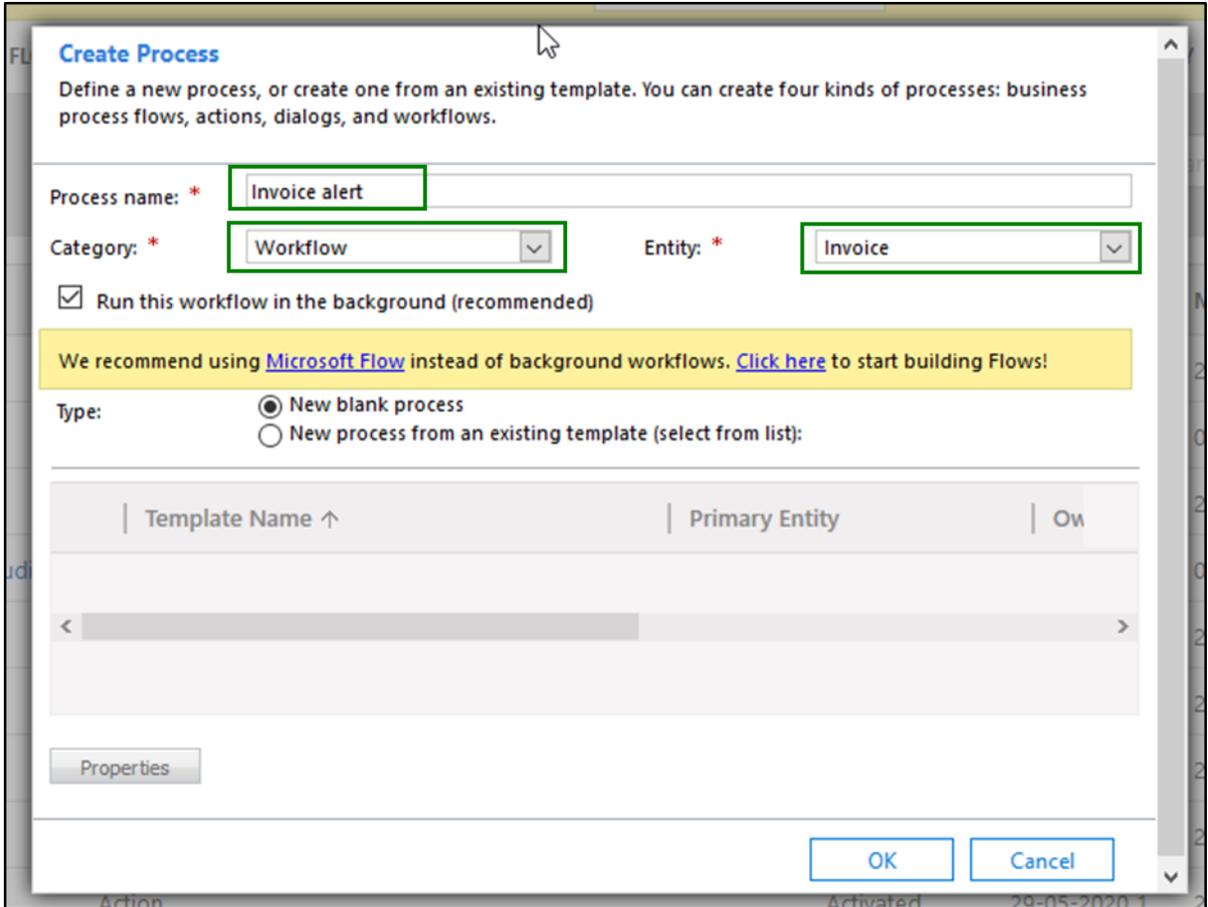
if you want the notification audience and email audience to be the related records which are in **‘One to Many’** or **‘Many to Many’** relationships. For **‘Many to One’** relationships we can define the audience by using the default form assistant available in OOB workflows.

Let’s consider the below scenario:

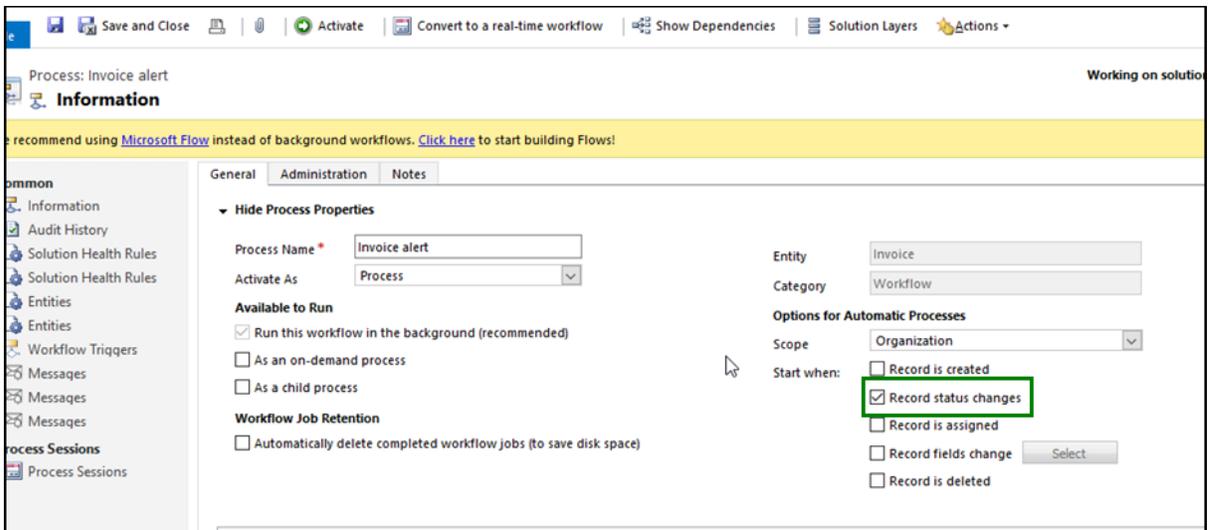
There is an invoice with a related account which has further multiple associated contacts and user wants to show the notification as well as send an email to these contacts once the invoice is paid. For this, we will configure the workflow as shown below:

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

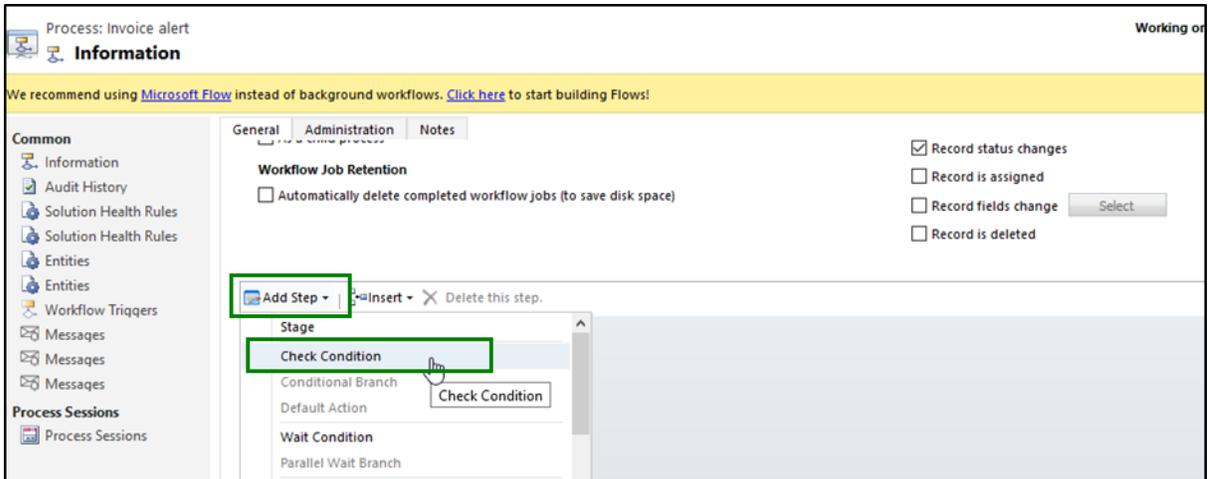




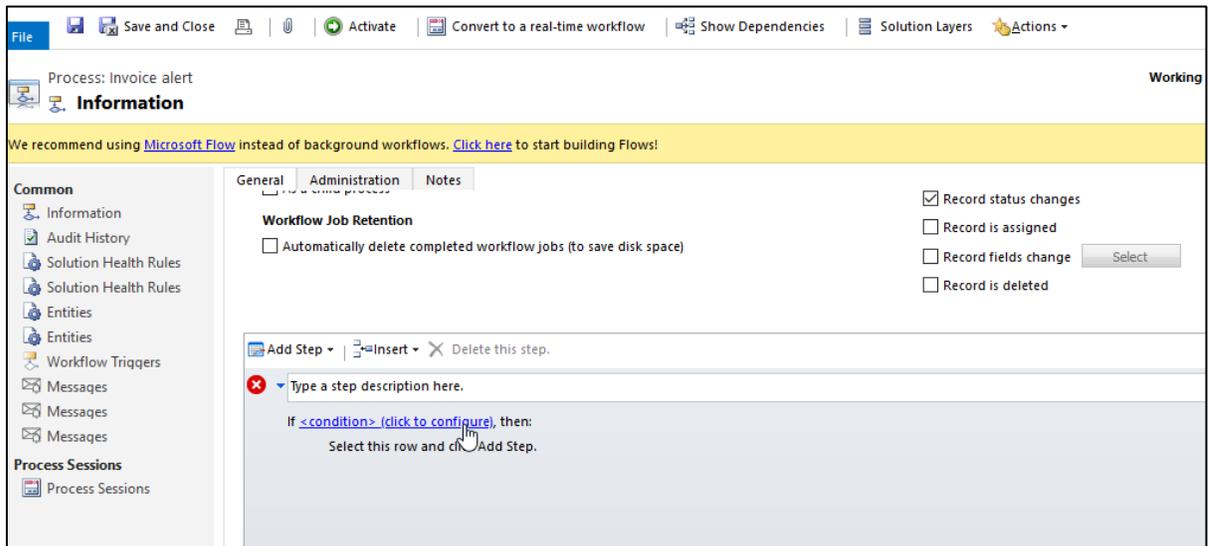
- 2) Since we want to trigger an alert on status change event of an invoice (i. e. when invoice is paid), we will enable the **'Record status changes'** checkbox.



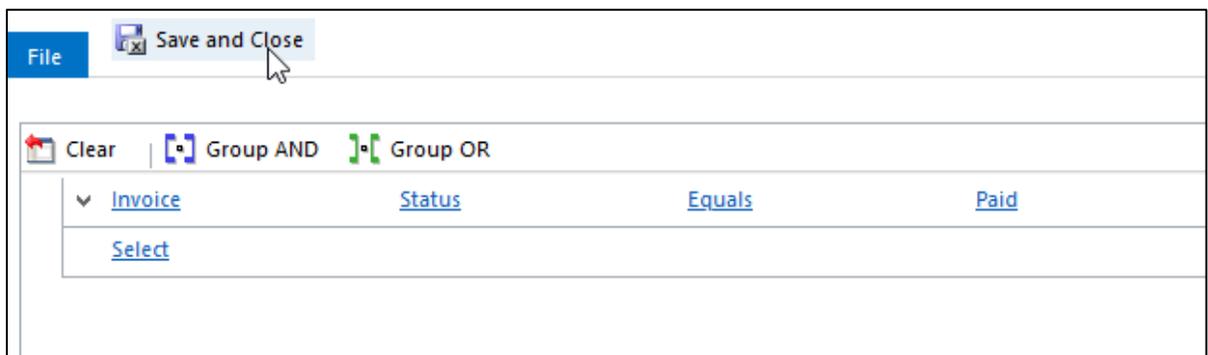
- 3) Now, add a step and check the condition if the invoice is paid.



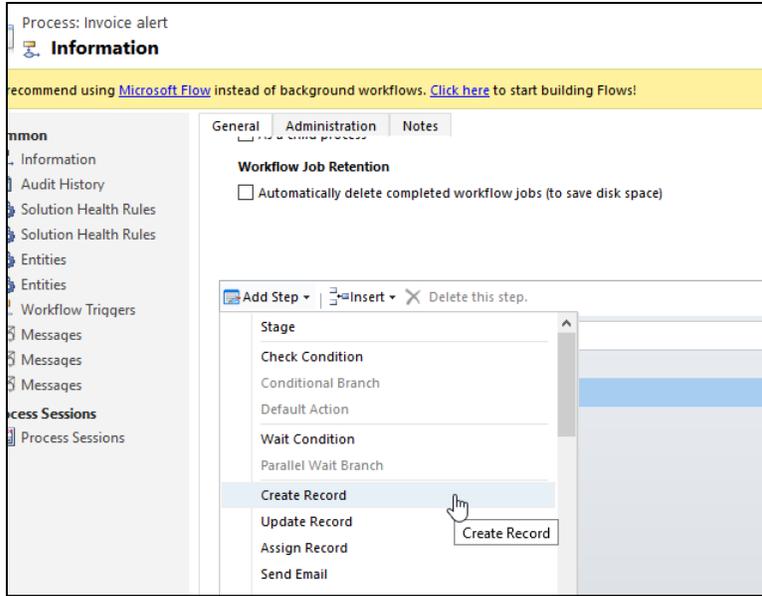
4) Here, we will check the condition whether the invoice status has been paid, you can similarly define any condition.



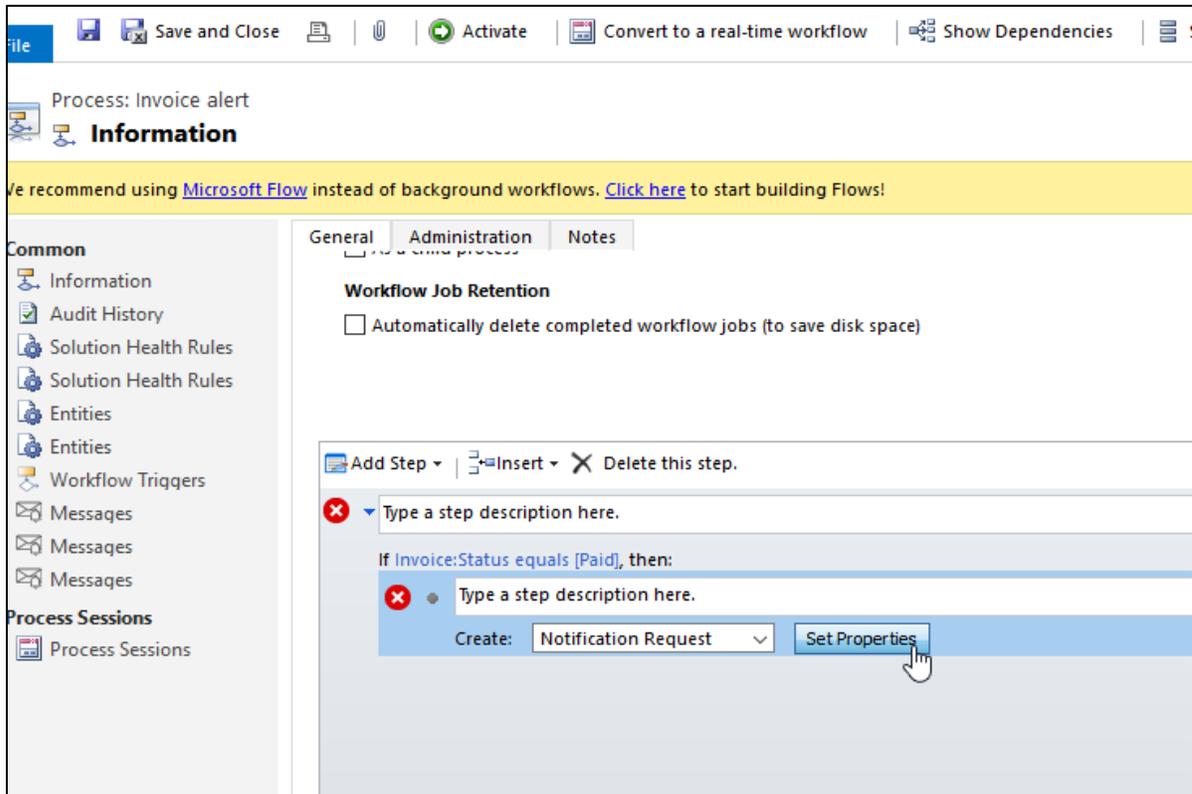
5) Now click on 'Save and Close'.



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



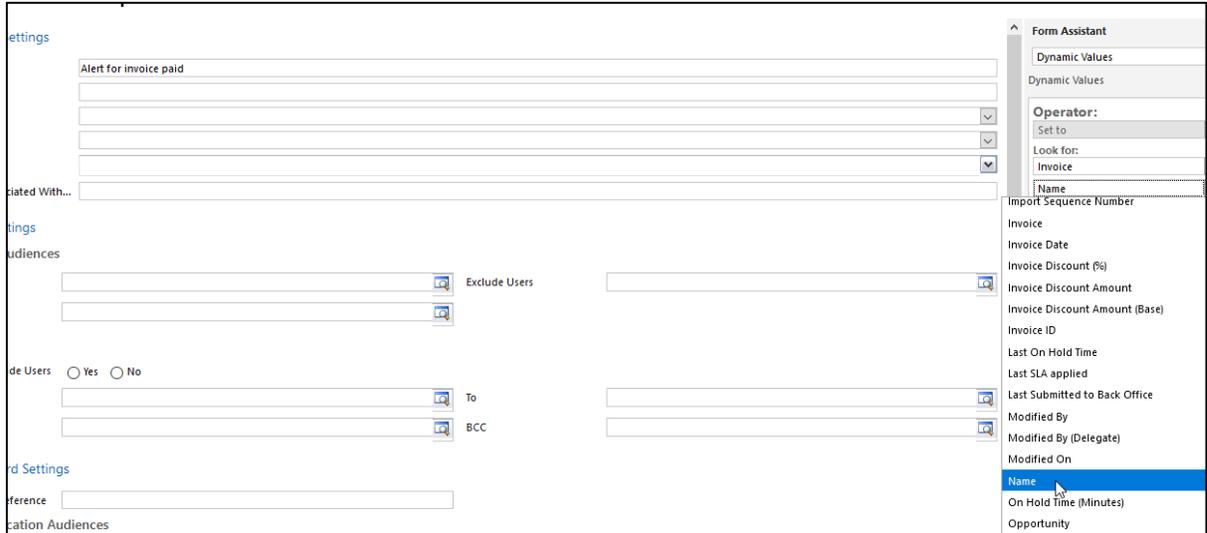
7) Select 'Notification Request' for record creation and click on 'Set Properties'.



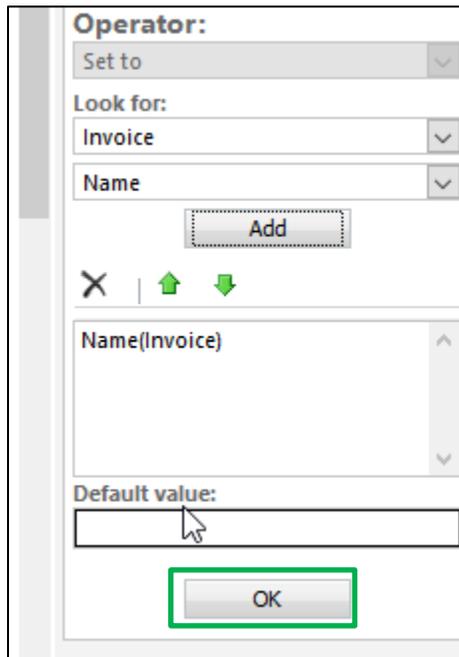
8) Fill the following fields:

- **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**.

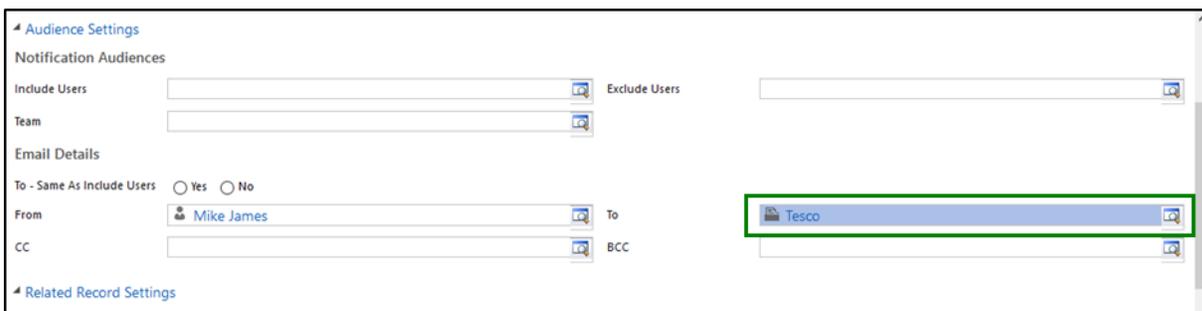
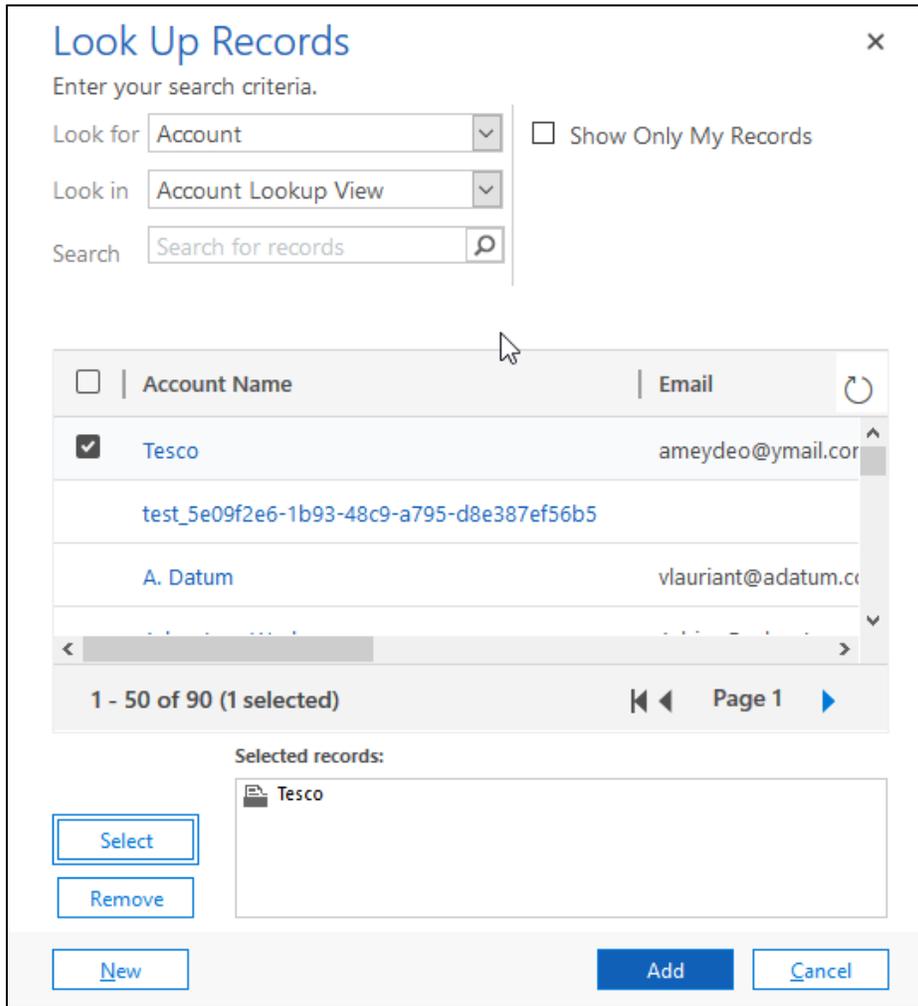
The screenshot shows a configuration dialog for the 'Notification Associated with' field. It features a 'Look for:' section with two dropdown menus: 'Customer (Account)' and 'Record URL(Dynamic)'. Below these is an 'Add' button. A list below the 'Add' button shows the selected expression: 'Record URL(Dynamic)(Customer (Ac'. At the bottom of the dialog is an 'OK' button.

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.

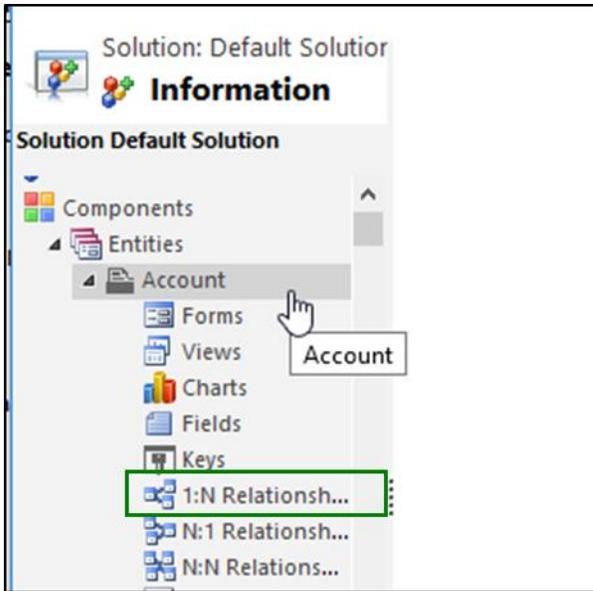
12) Select the user that you would like to send an email notification from and click on 'Add'.

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.

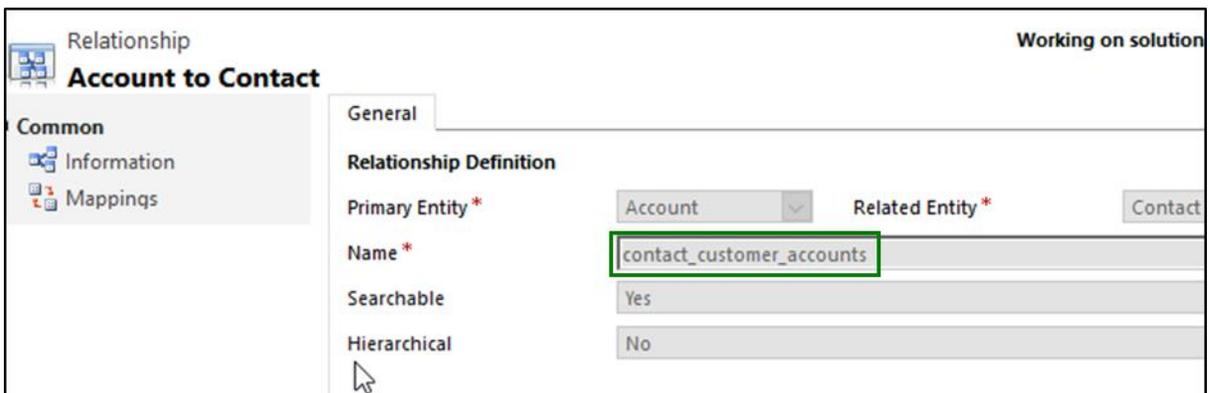
- 15) Next step is to define the related recipients for receiving the email notification. For this, you will have to enter a logical name of 1: N relationship that account holds with contact. **Navigate to Advanced Settings → Customizations → Customize the system.**
- 16) Look for Account entity → 1: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



17) Look for the below relationship and open it.

Schema Name	Primary Entity	Related Entity ↑	Type of Behavior
incident_customer_acc...	Account	Case	Parental
account_IncidentResol...	Account	Case Resolution	Parental
account_connections1	Account	Connection	System
account_connections2	Account	Connection	System
<input type="checkbox"/> contact_customer_acc...	Account	Contact	Parental
contract_billingcustom...	Account	Contract	Referential, Restrict

18) Copy the name of the relationship.



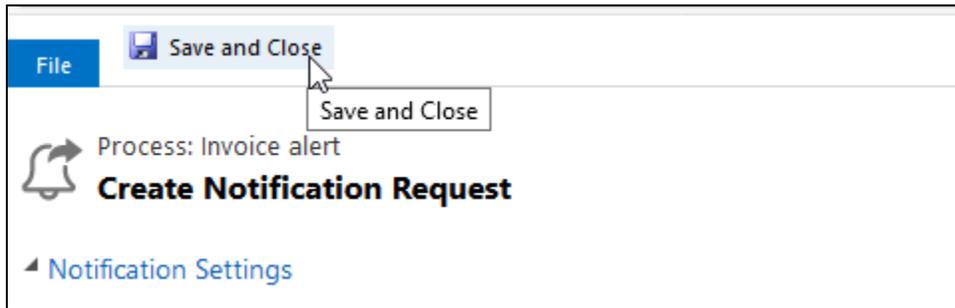
19) Now, navigate back to properties page and paste the name of this relationship into the below field. Similarly, if you want the audience to be of type more than one relationship then you can define multiple relationship as comma separated.

The screenshot shows the 'Create Notification Request' form for 'Process: Invoice alert'. The form includes fields for 'From' (Mike James), 'CC', 'Related Record Settings' (Primary Record Reference: {Record URL(Dynamic)(Customer (Account))}), 'Related Notification Audiences' (Include Users Relations), 'Related Email Recipients' (To Relations: contact_customer_accounts, CC Relations), and 'Email Content'.

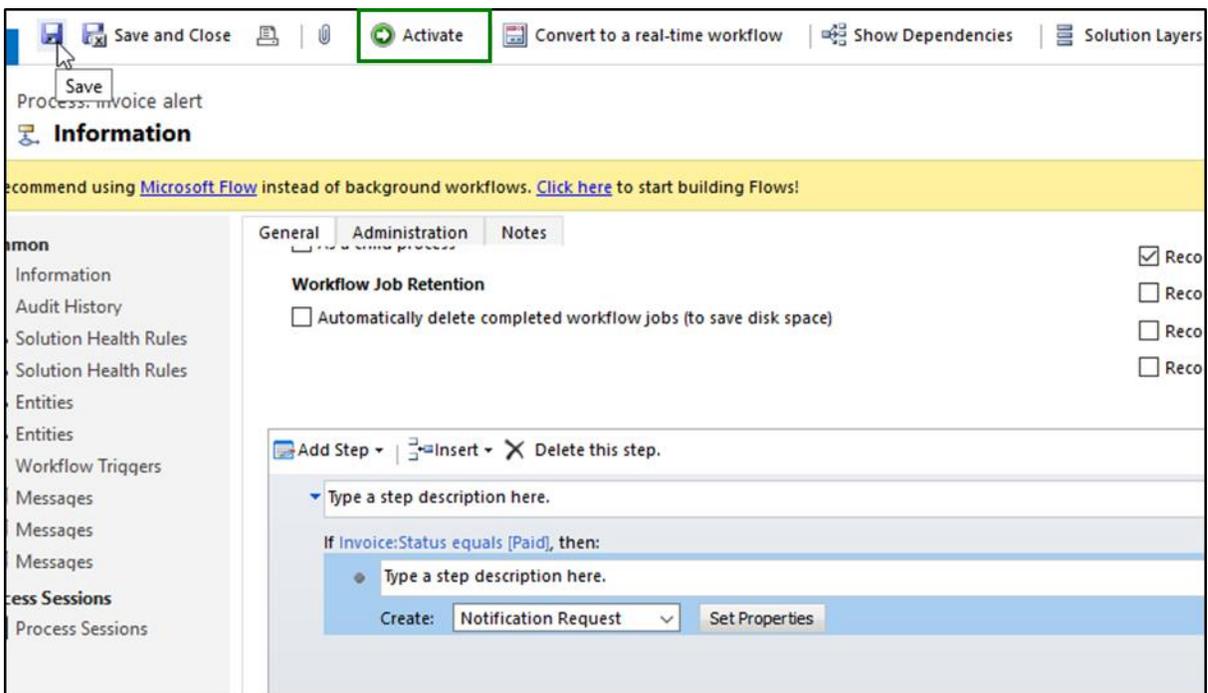
20) Enter a valid subject and relevant message for an email.

The screenshot shows the 'Email Content' section of the 'Create Notification Request' form. The 'Subject' field is filled with 'Invoice paid'. The message body contains the text: 'Hi, We confirm that the invoice is paid Regards, Mike'.

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

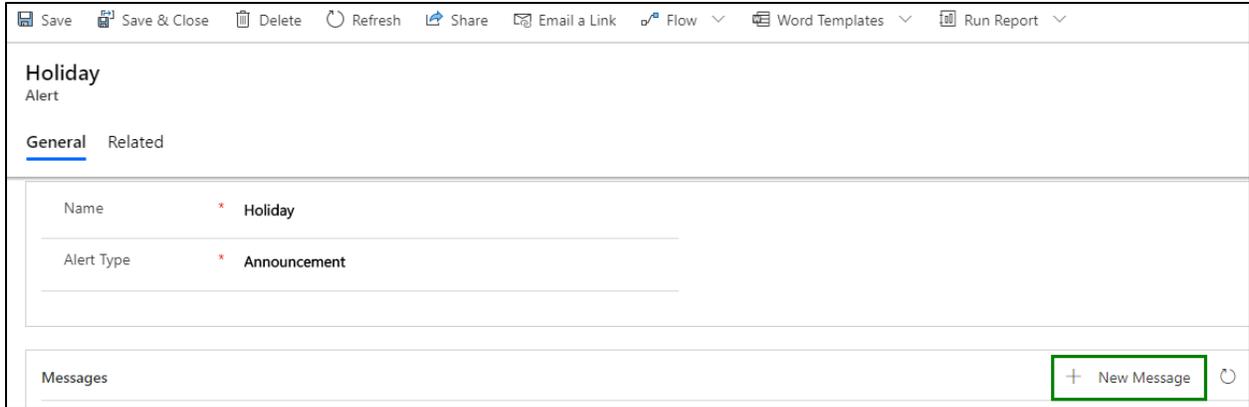


22) Next, click on 'Save' and activate the workflow.



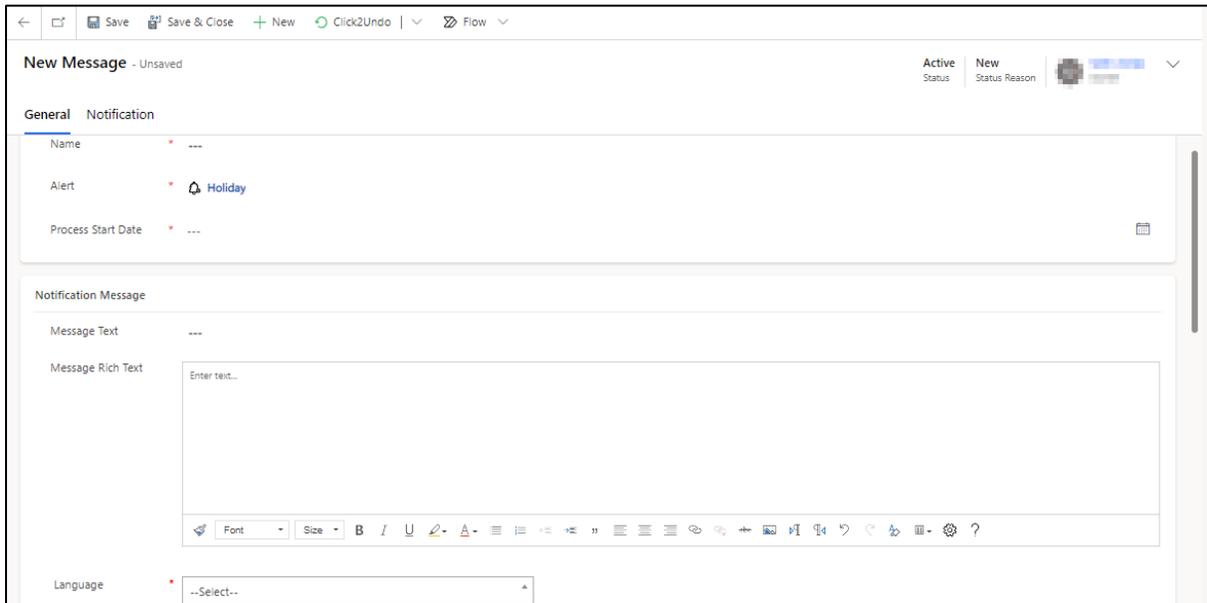
Message

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.

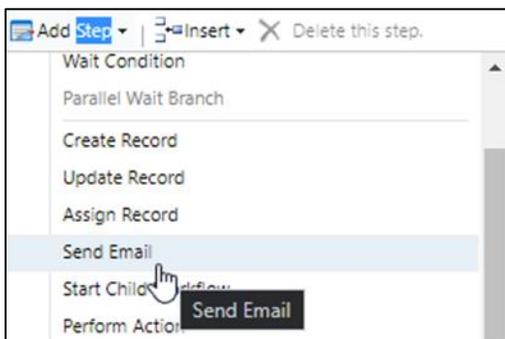


Enter the value in fields:

- Name:** This is the name of the message you are trying to create.
- Alert:** This is the Alert for which you are creating the message.
- 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.
- 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.



Alerts4Dynamics – User Manual

General Administration Notes

Hide Process Properties

Process Name * Entity
Activate As Category

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)

Options for Automatic Processes

Scope
Start when:
 Record is created
 Record status changes
 Record is assigned
 Record fields change
 Record is deleted

Add Step

Send Email
Send email:

Process: Send Email Notification
Send Email

From
To
Cc
Bcc
Subject

Hi {Owning User(Record (Account))} ,
Please look into this Account which has been overdue.
Thanks,
John

Alert on Invoice Paid - Saved Active Status

Message

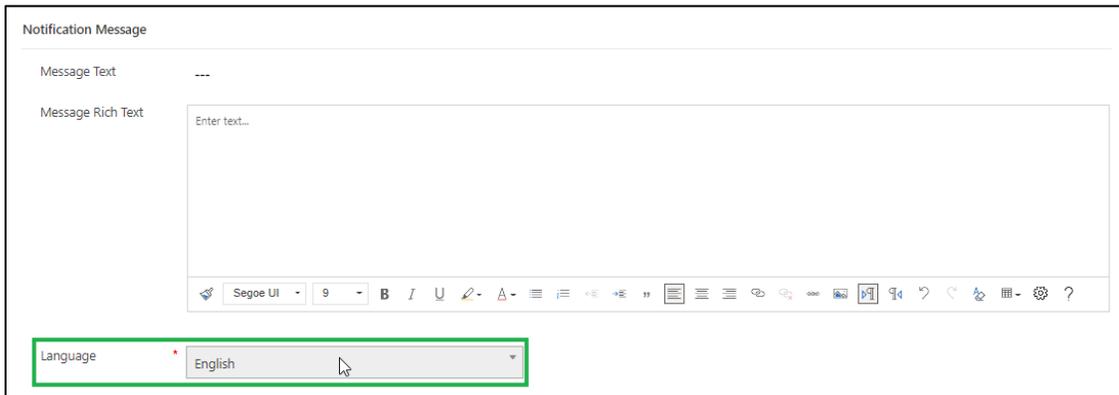
General Notification Related

Message Type * **Simple**
Alert * Alert on Invoice paid
Process Start Date * 5/23/2023
Process End Date ---

Notification Configuration

Alert As * Alert Level * **Information**
Email Workflow *

- 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.

Alerts4Dynamics – User Manual

Notification Audience

Include Users	<input type="checkbox"/> Owing User <input type="checkbox"/> Owing User.Manager	Exclude Users	<input type="checkbox"/> Scott Hamells
Security Roles	<input type="checkbox"/> Salesperson	Teams	<input type="checkbox"/> Sales Team

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

Save Save & Close **Activate** Delete Refresh Share Email a Link Flow Word Templates Run Report

Click Activate to publish this message. Once published, it'll start generating notifications from the Process Start Date.

Holiday on 30th July Message Active Status Draft Status Reason Sam Kumar Owner

General Notification Related

Name * Holiday on 30th July

Alert * Holiday

Process Start Date * 6/4/2020

Notification Message

Message Text * Holiday on 30th July due to elections Language * English

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

Save Save & Close **Draft** Delete Refresh Share Email a Link Flow Word Templates Run Report

Holiday on 30th July Message Active Status Active Status Reason Sam Kumar Owner

General Notification Related

Name * Holiday on 30th July

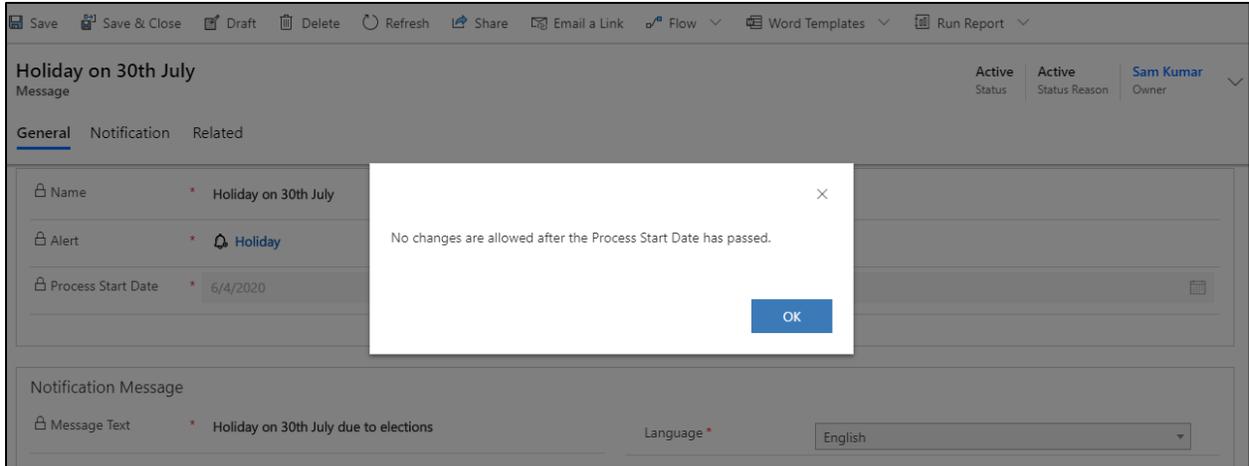
Alert * Holiday

Process Start Date * 6/4/2020

Notification Message

Message Text * Holiday on 30th July due to elections Language * English

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.

Account Create Message - Saved
Message

General Notification Related

Notification Message

Message Text **An account has been created**

Message Rich Text
Enter text...

Font Size B I U [Rich Text Toolbar]

Language English

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

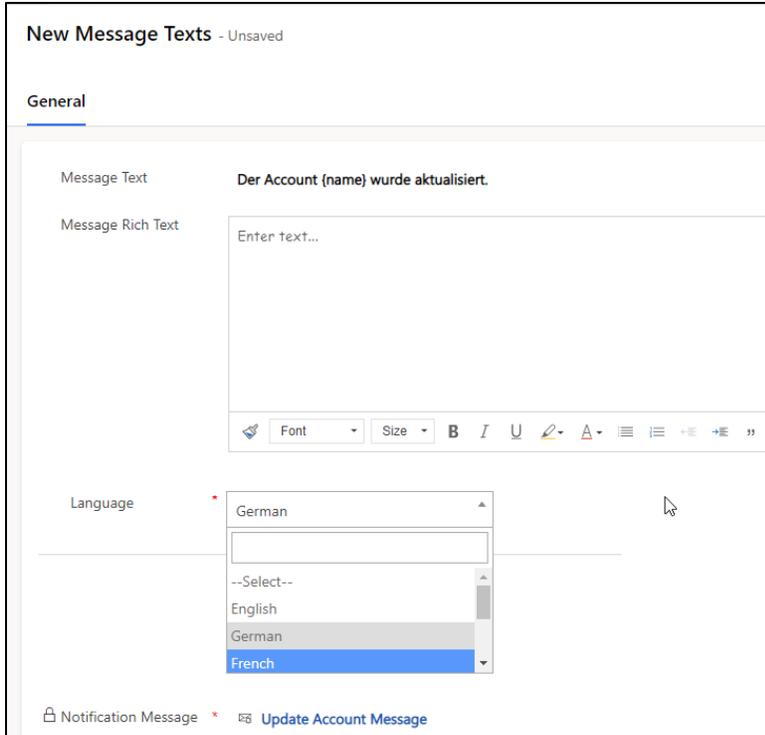
Notification Message

[Edit] Delete Message Texts

Message	Message Rich Text	Language
✓ An account has been created		English

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

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



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.

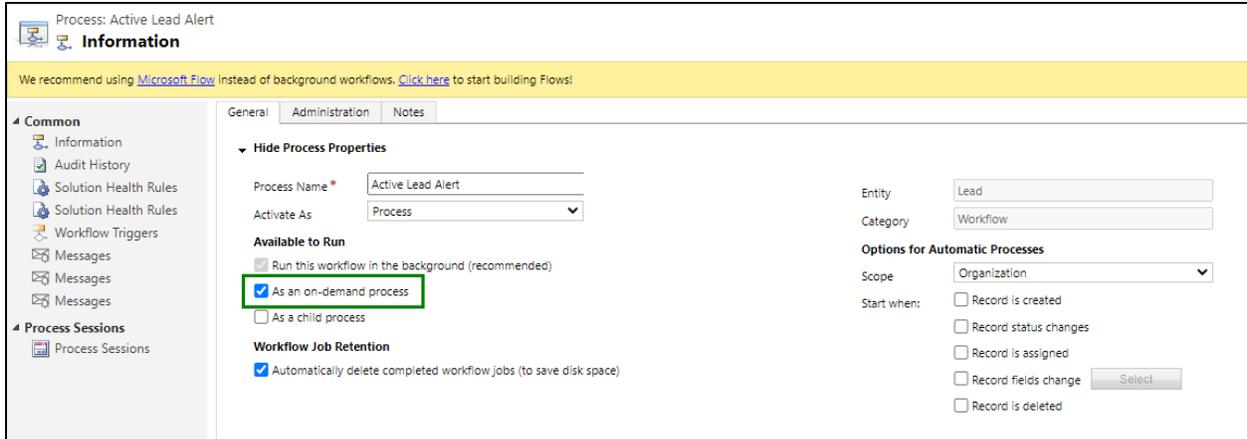
General		Notification	
Name	*	---	
Message Type	*	Simple	
Alert	*	---	
Process Start Date	*	---	
Process End Date		---	
Notification Message			
Message Text	*	---	
		Language *	--Select--

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.

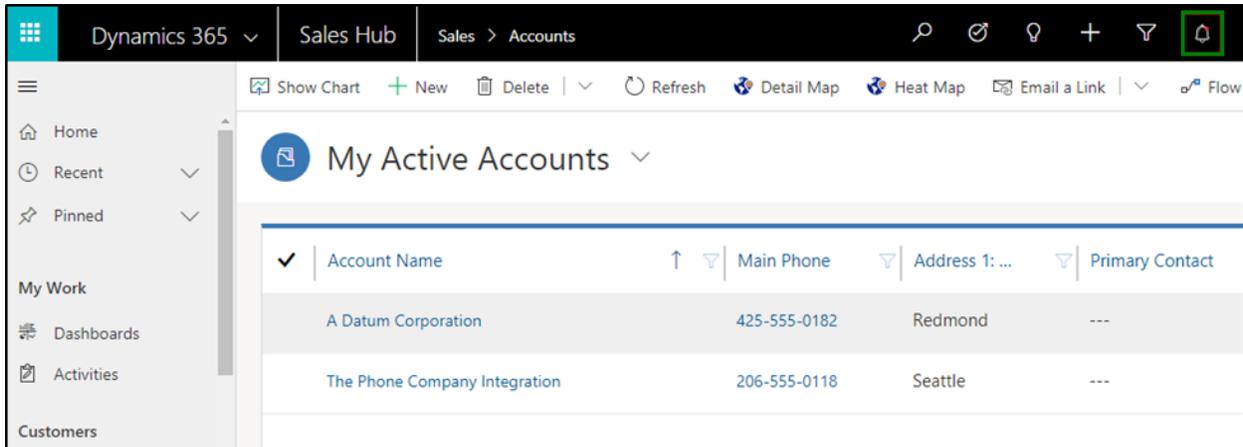
Active Lead Message		Active	Draft
Message		Status	Status Reason
General		Notification	Related
Name	*	Active Lead Message	
Message Type	*	Advanced	
Workflow	*	Active Lead Alert	
Alert		Open Leads	
Process Start Date	*	6/3/2020	
Process End Date		---	



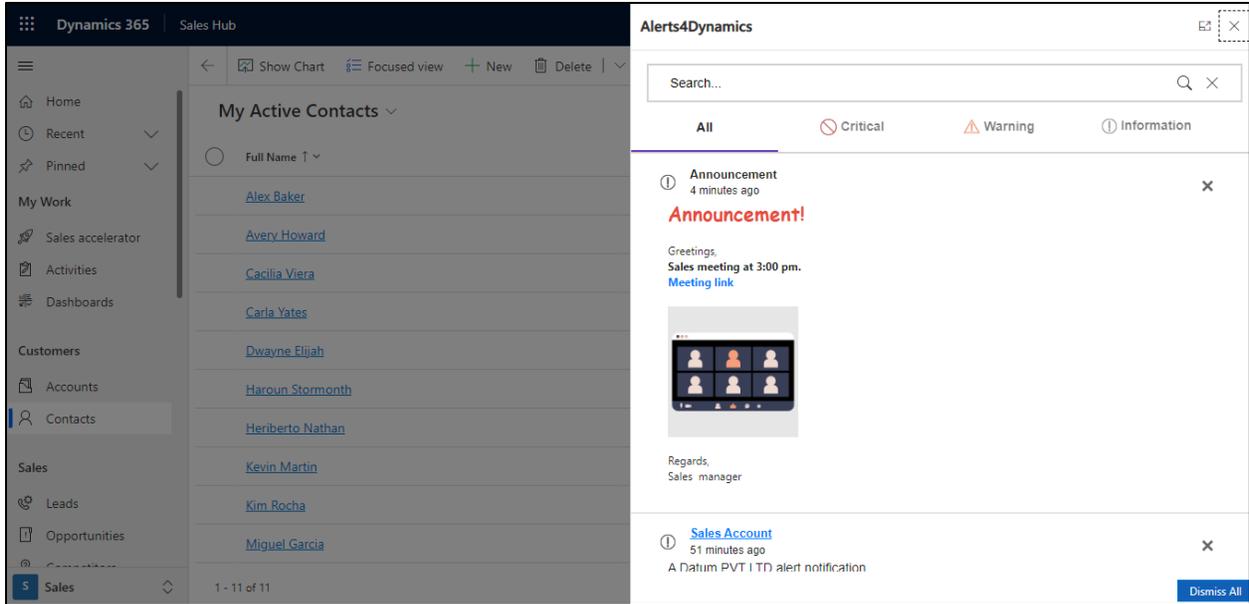
Notifications

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.

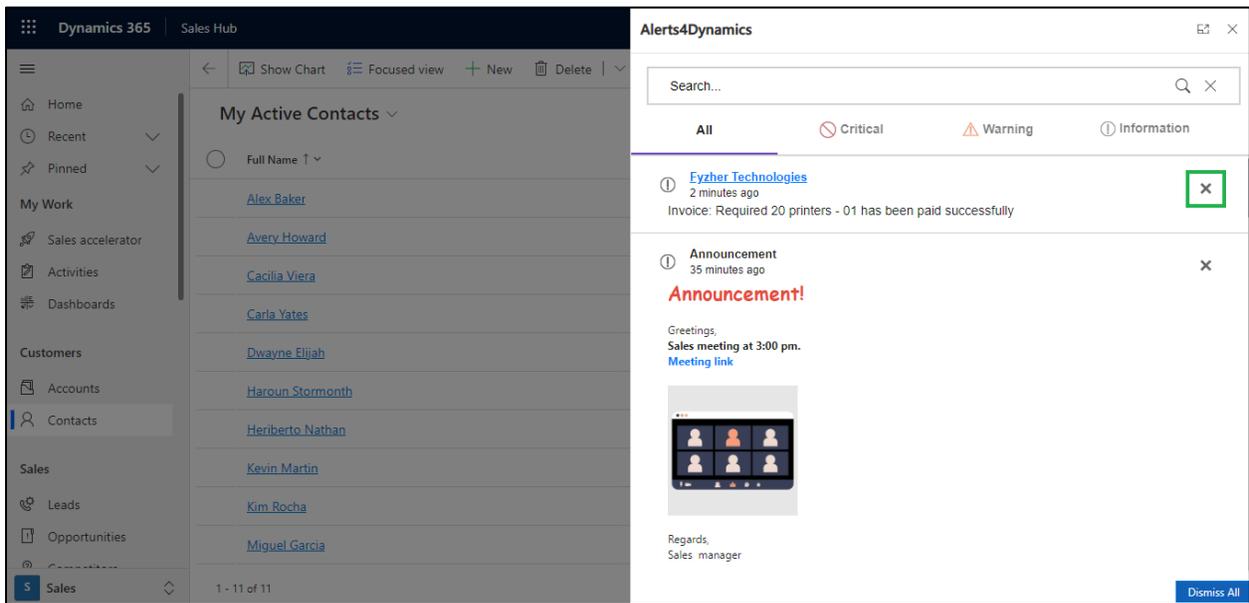


Notifications can be seen by clicking on Notification button.



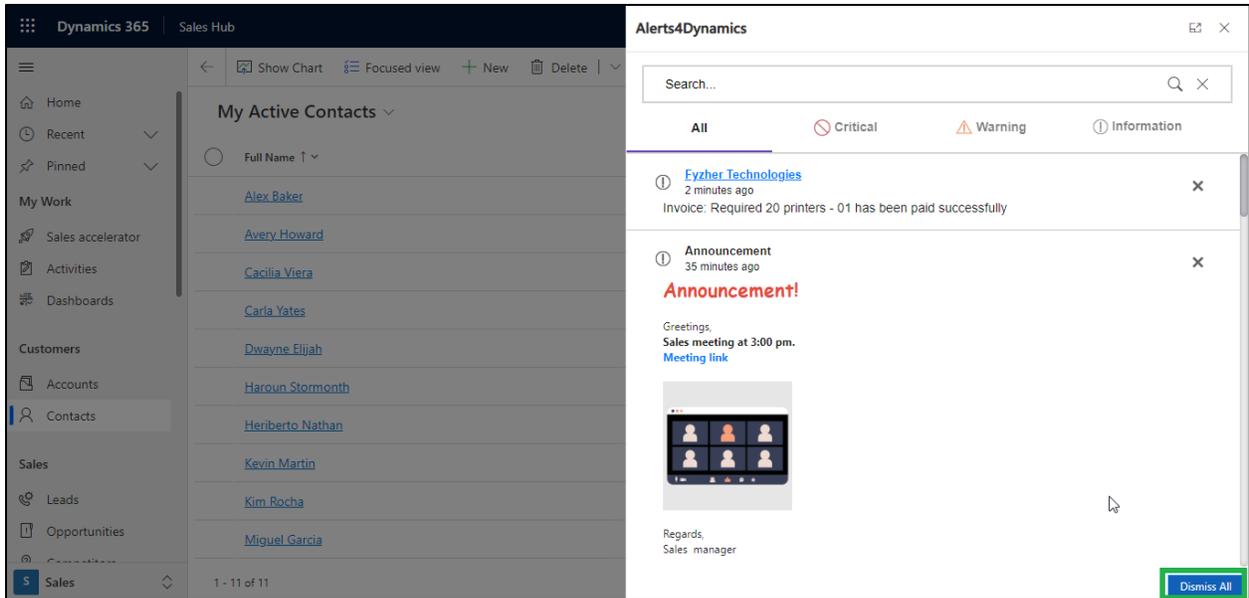
Dismiss Notifications: Notifications can be dismissed at any time. Notifications can be dismissed in two ways:

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



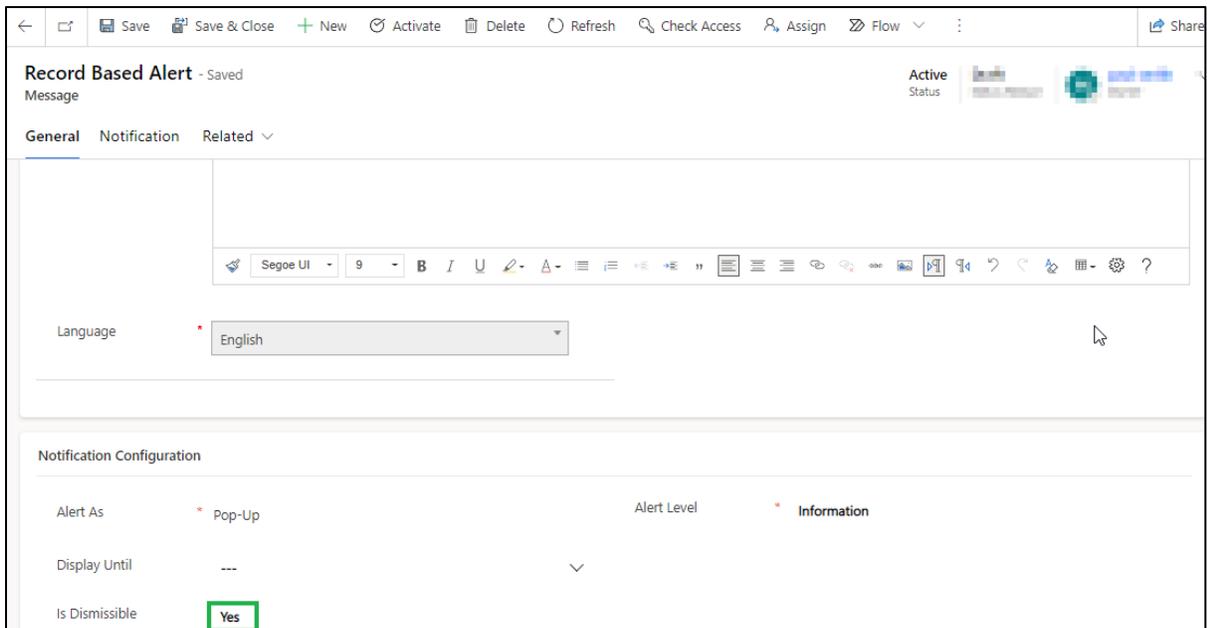
- 2. Dismiss all alerts at once:** All the alerts can be dismissed at once by clicking on **Dismiss All** button.

Alerts4Dynamics – User Manual

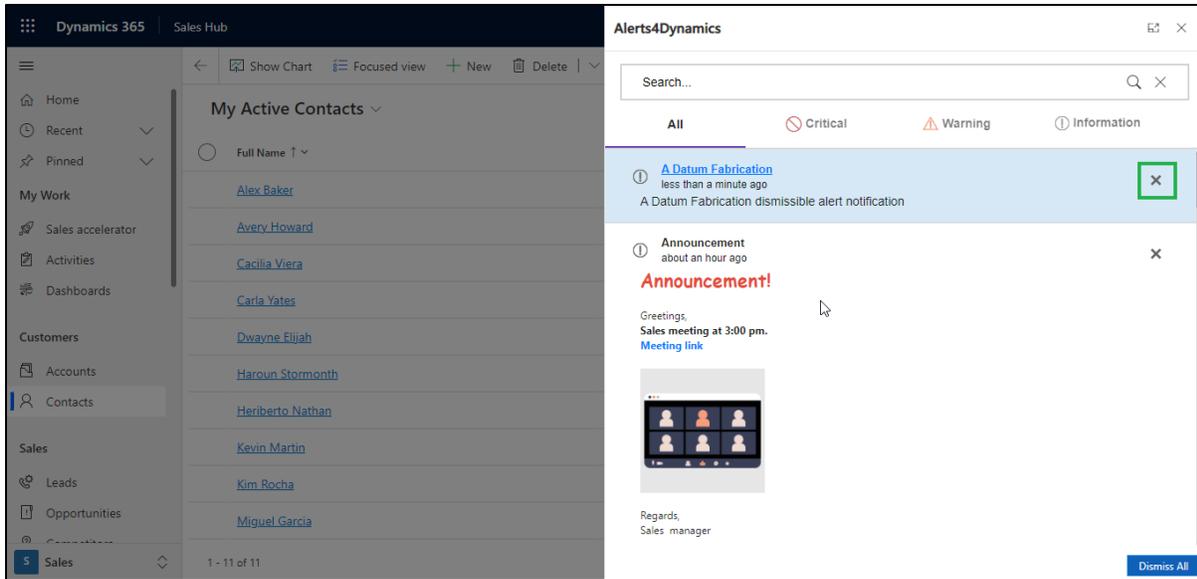


Dismissible Alert Notifications:

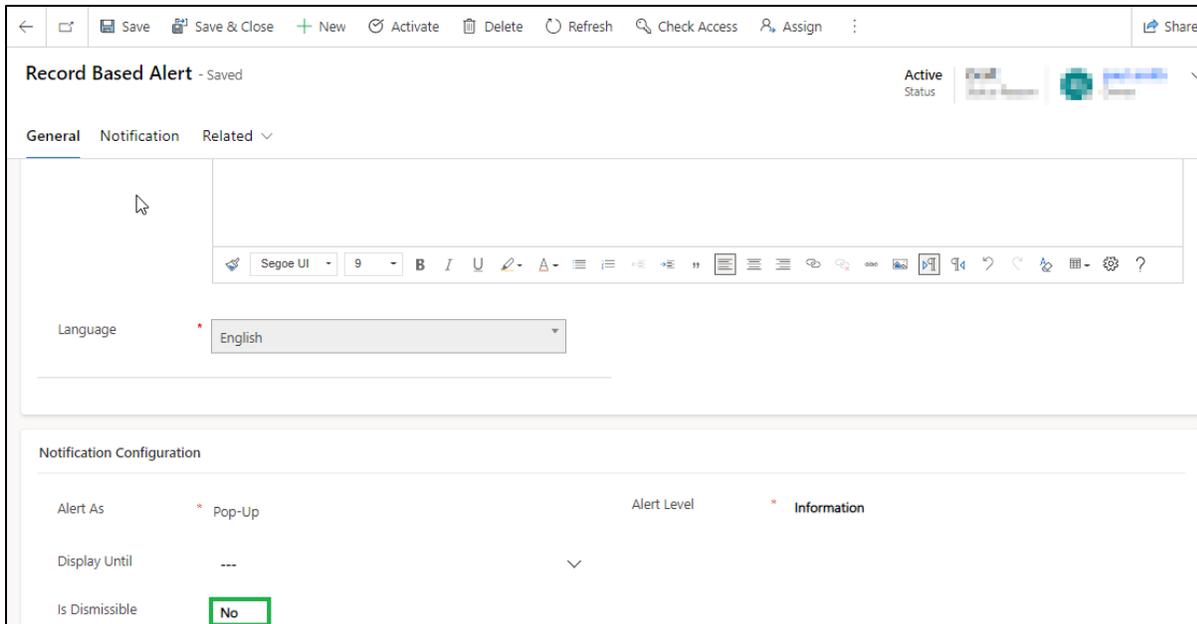
If user sets 'Is Dismissible' field as 'Yes' then the alert can be dismissed. In this case, 'X' button will continue showing up on the alert notification indicating that the alert notification is dismissible.



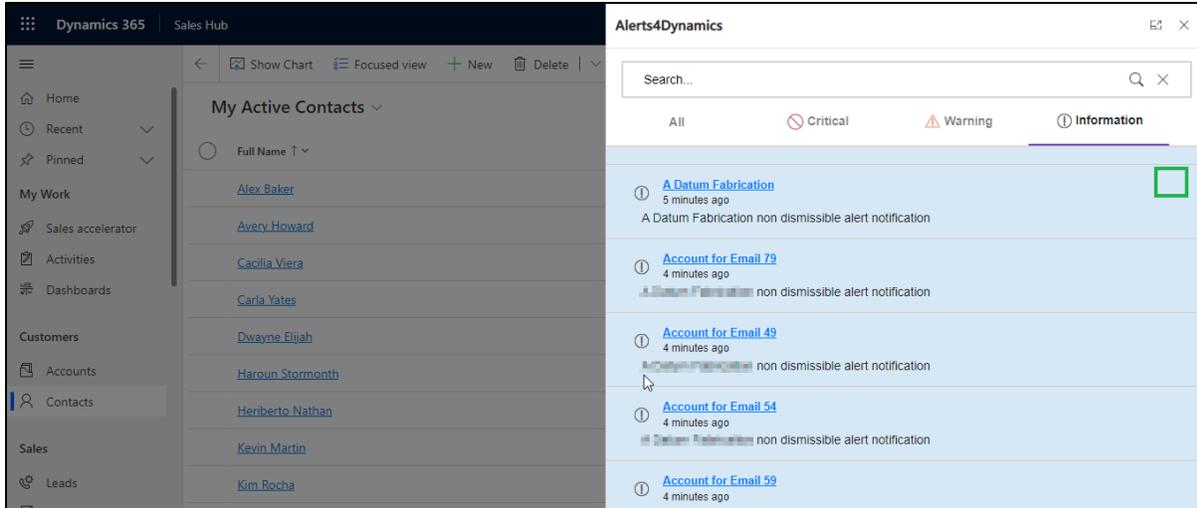
Alerts4Dynamics – User Manual



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.



Alerts4Dynamics – User Manual



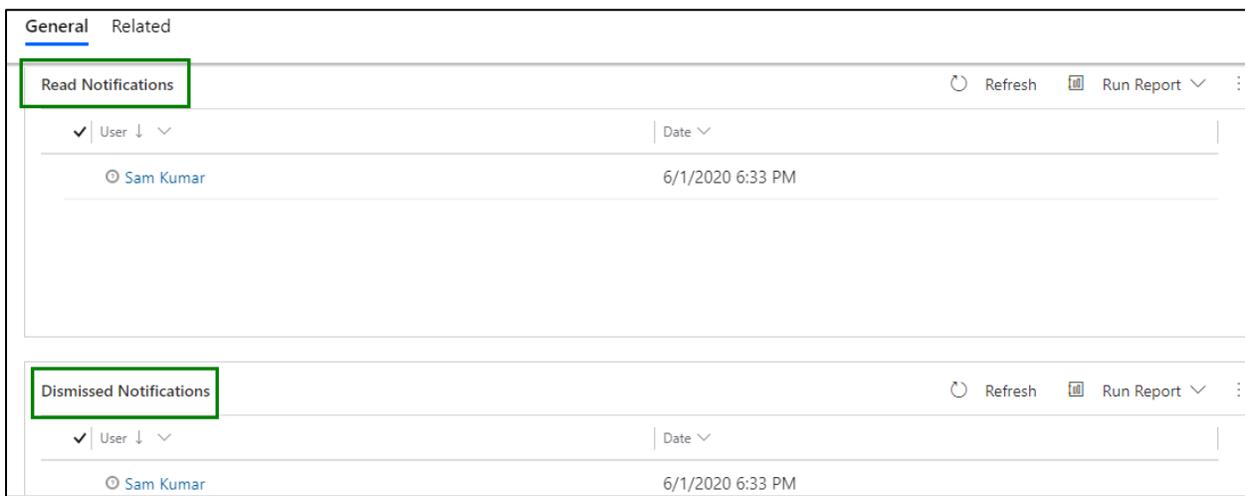
Note:

- **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.

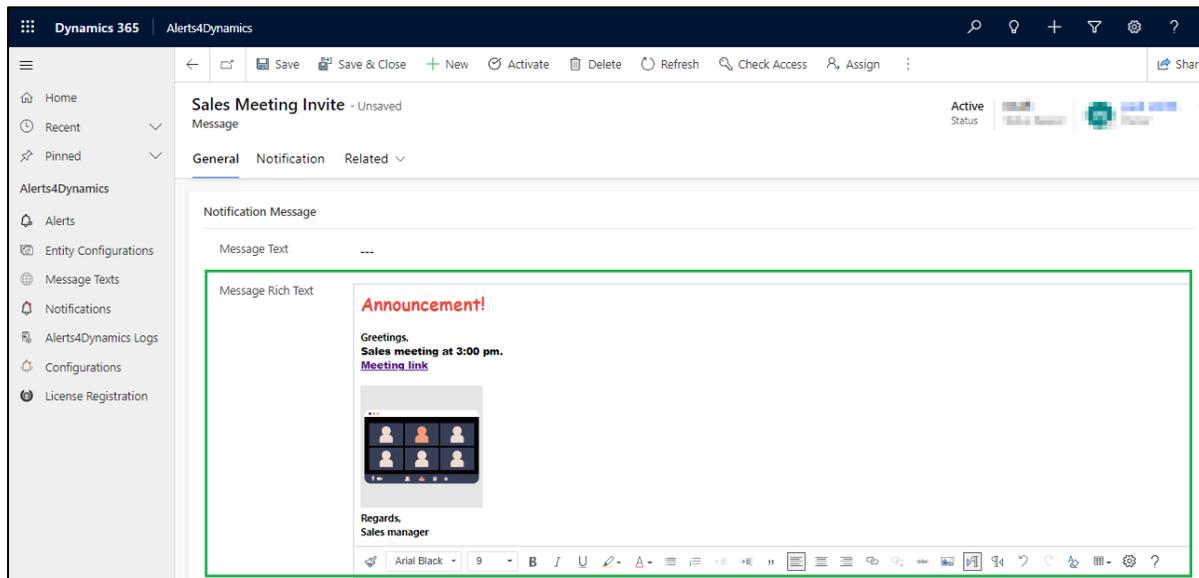


Message Rich Text

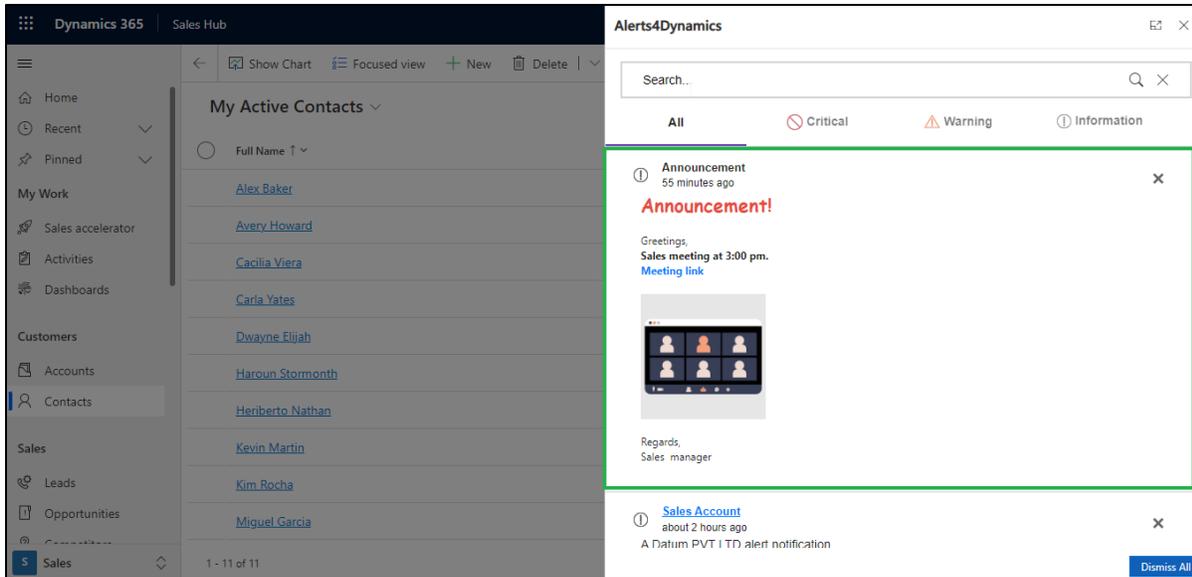
This provision allows users to create more interactive messages by doing all kinds of text formatting, adding links and images, etc., to make their alerts and notifications more descriptive and engaging.

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:

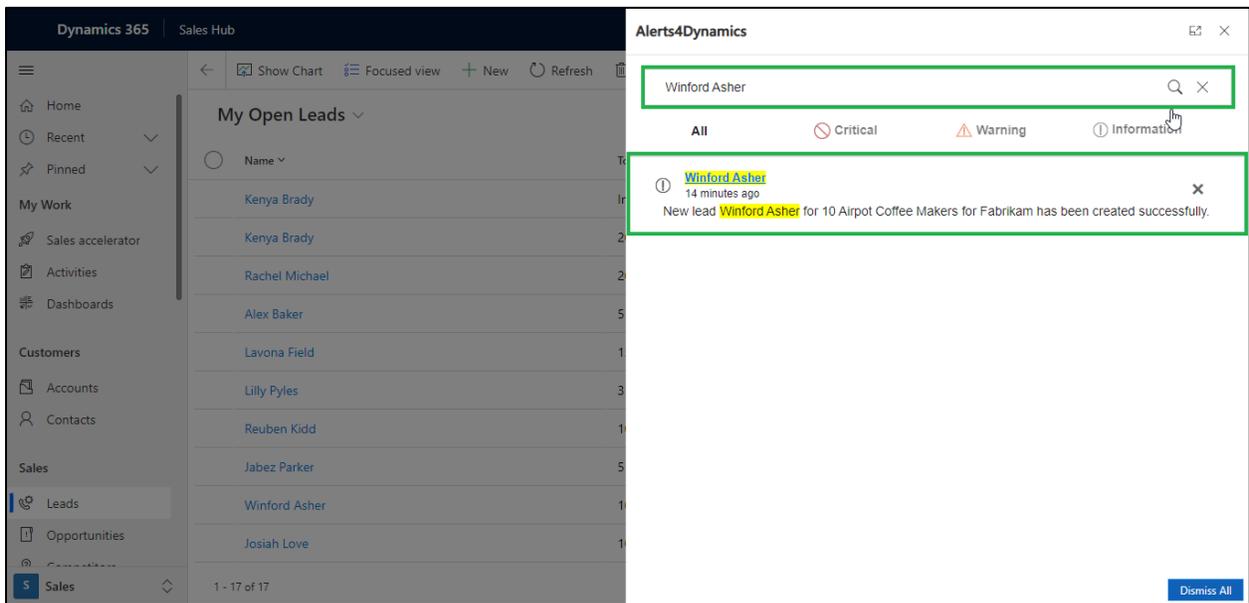
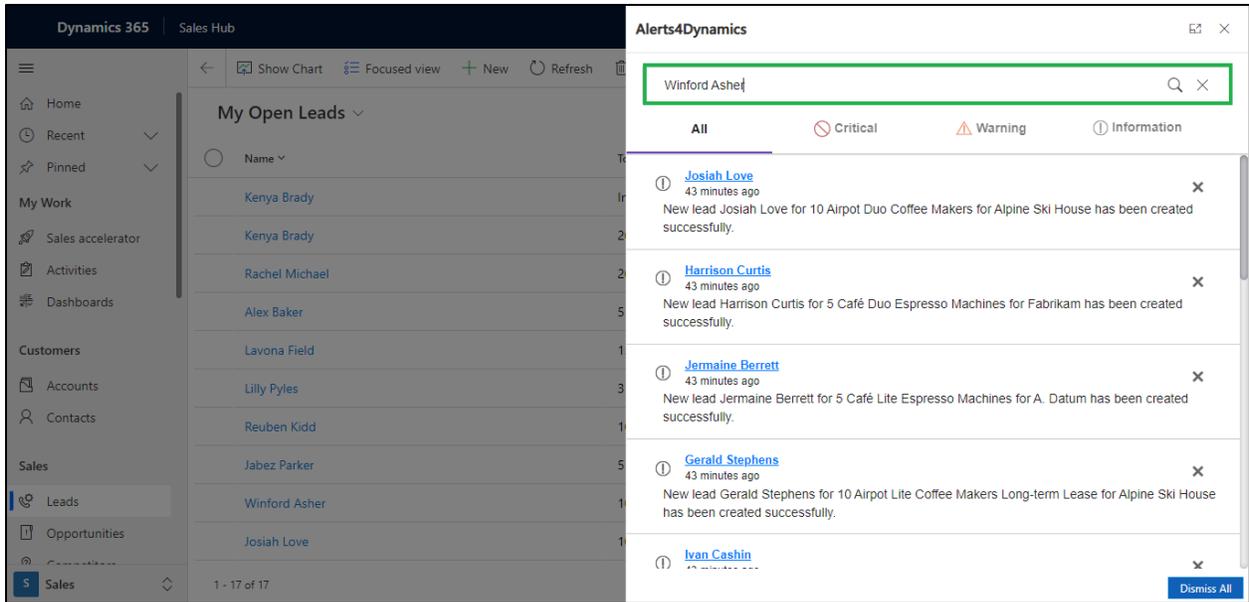
- ***If both Message Text and Message Rich Text fields are filled, then preference will be given to Message Rich Text when displaying the notification.***
- ***Message Rich Text cannot be displayed as a bar in a form notification.***
- ***To add Message Rich Text in Event-Based Alerts you need to create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

Search Notifications

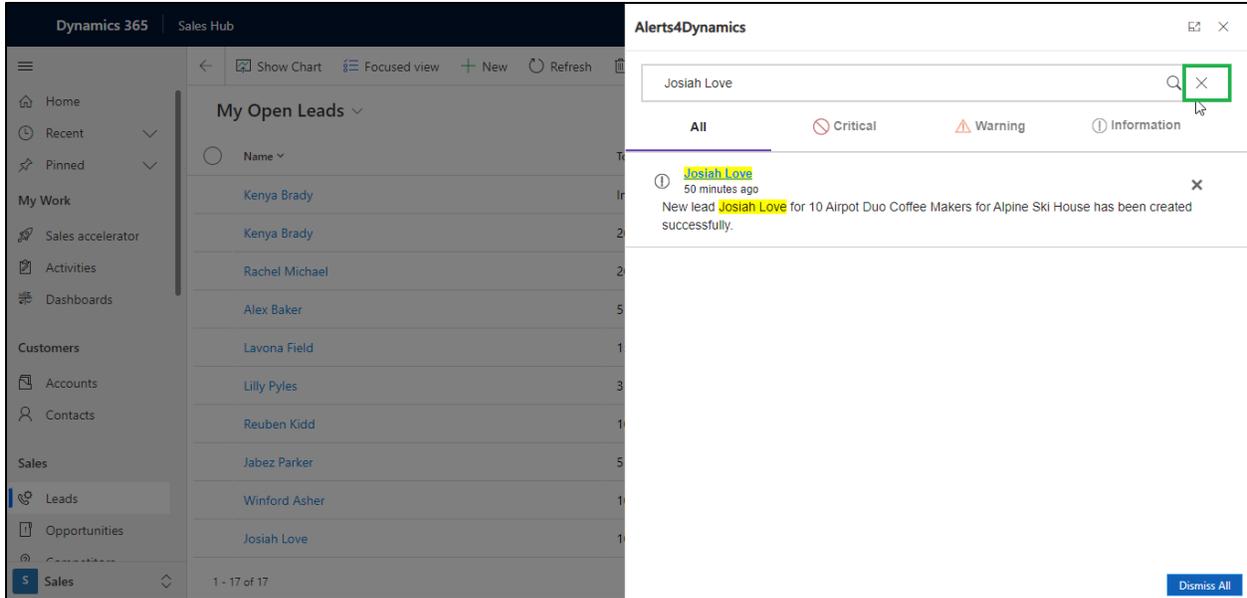
With the search notification feature on the notification panel, users can quickly search for desired Announcements and Notifications.

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.

Alerts4Dynamics – User Manual



Users can clear all the search results by using 'Clear Icon'.



Email Digest Workflow Configuration

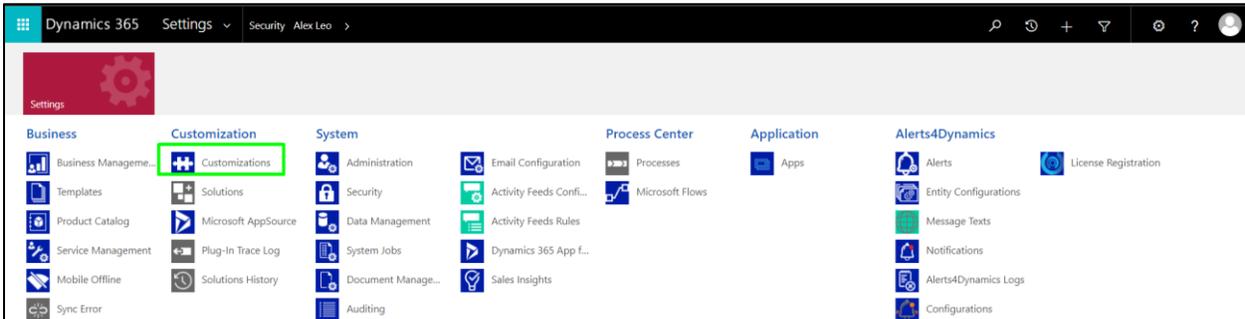
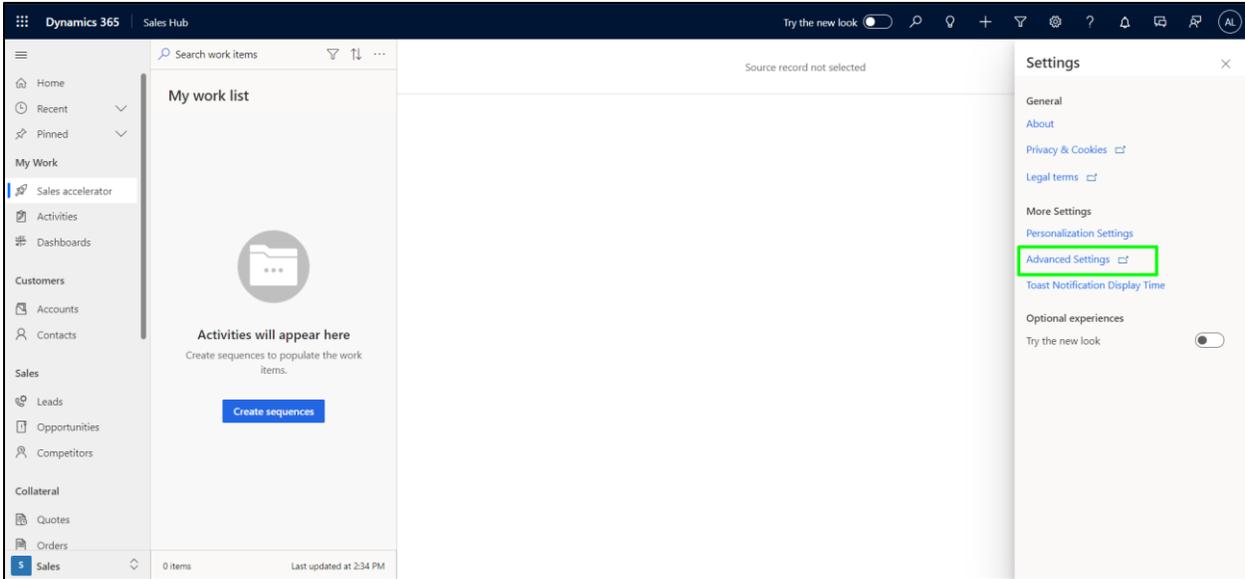
With Email Digest Workflow feature, users with an Alerts4Dynamics administrator role, manager or user role can receive, unread, read not dismissed, or all notifications as email. Users can receive the email automatically on a Daily, weekly, and Monthly basis.

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.

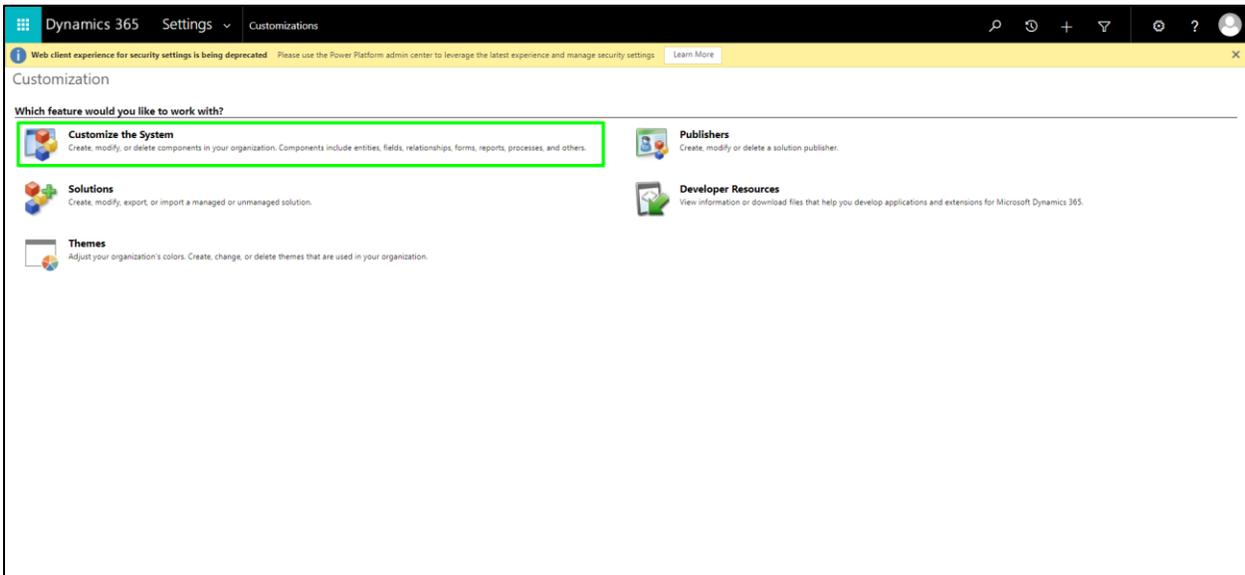
To set up the email template follow, the steps below:

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

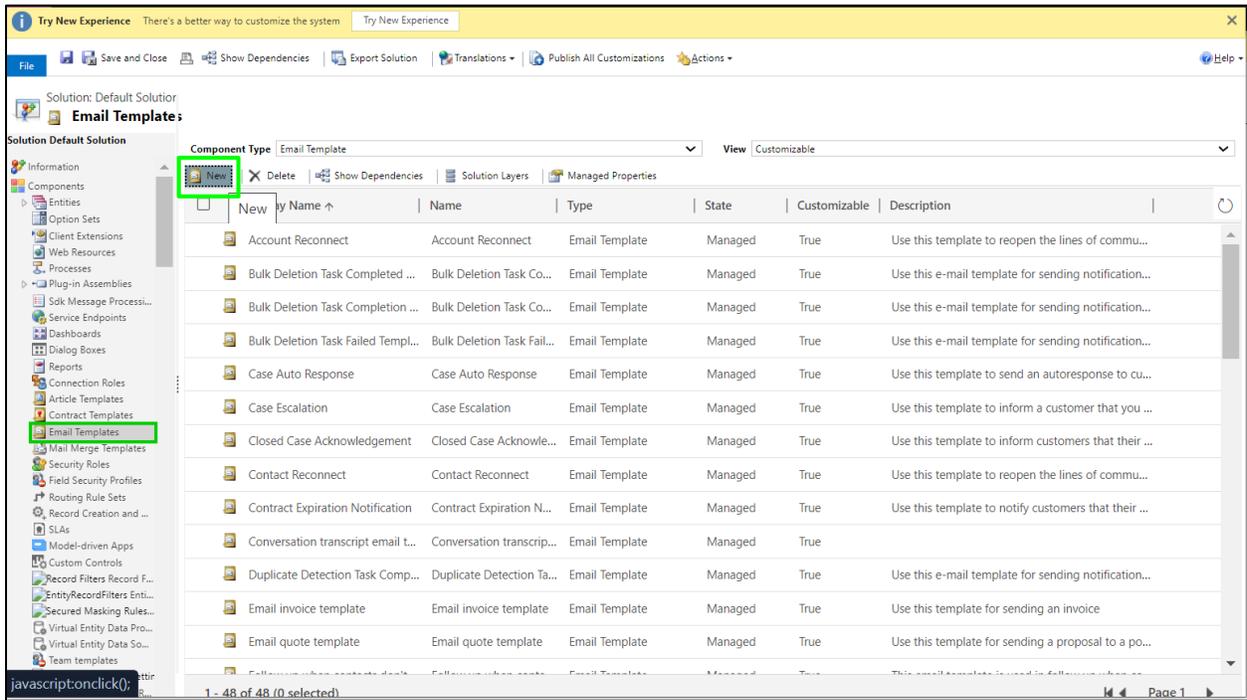
Alerts4Dynamics – User Manual



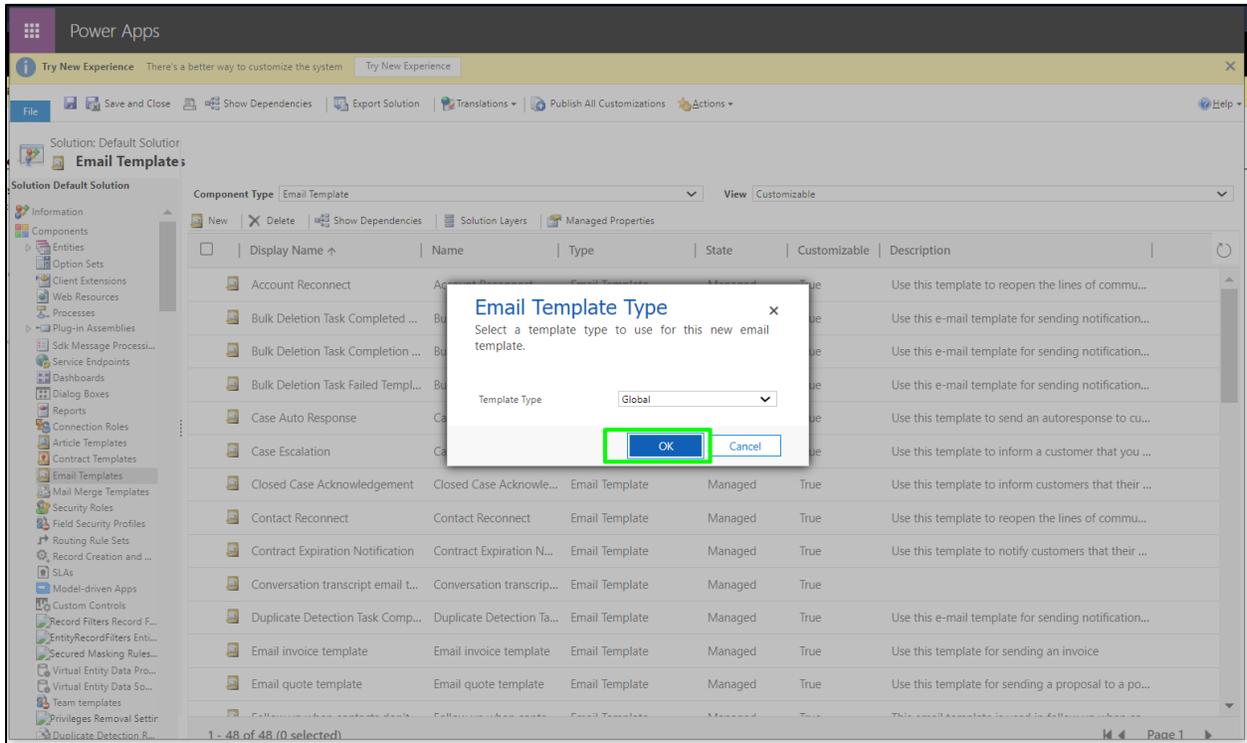
- Choose **“Customize the System.”**



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

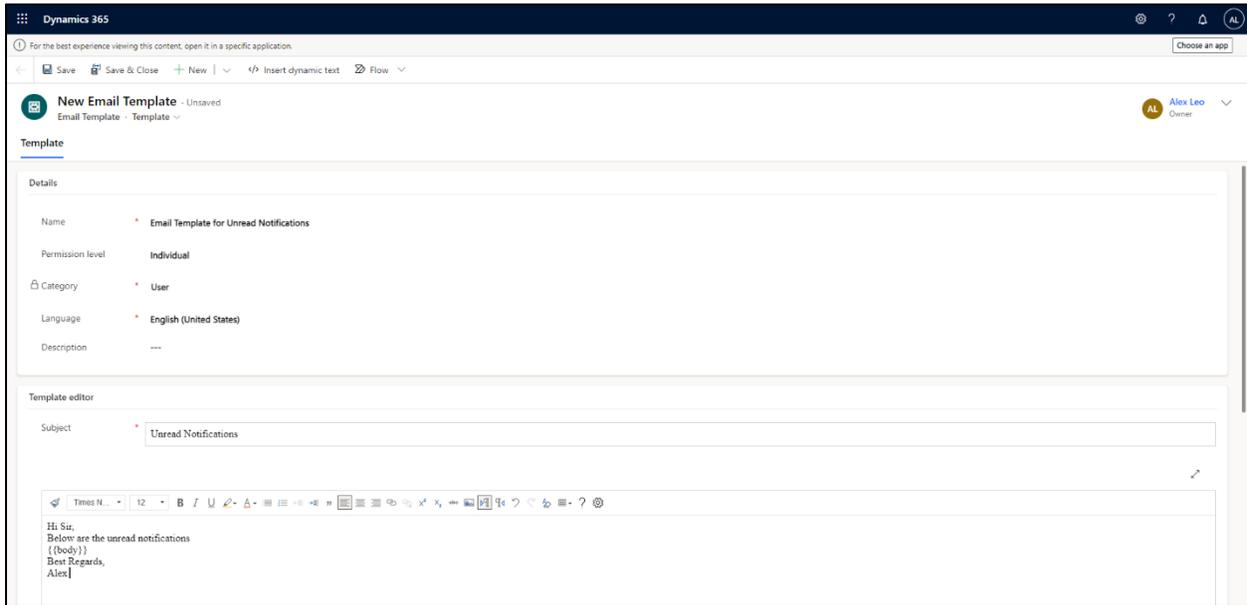


- Select Template Type as **“Global.”** Let it be that way and click **“Ok.”**



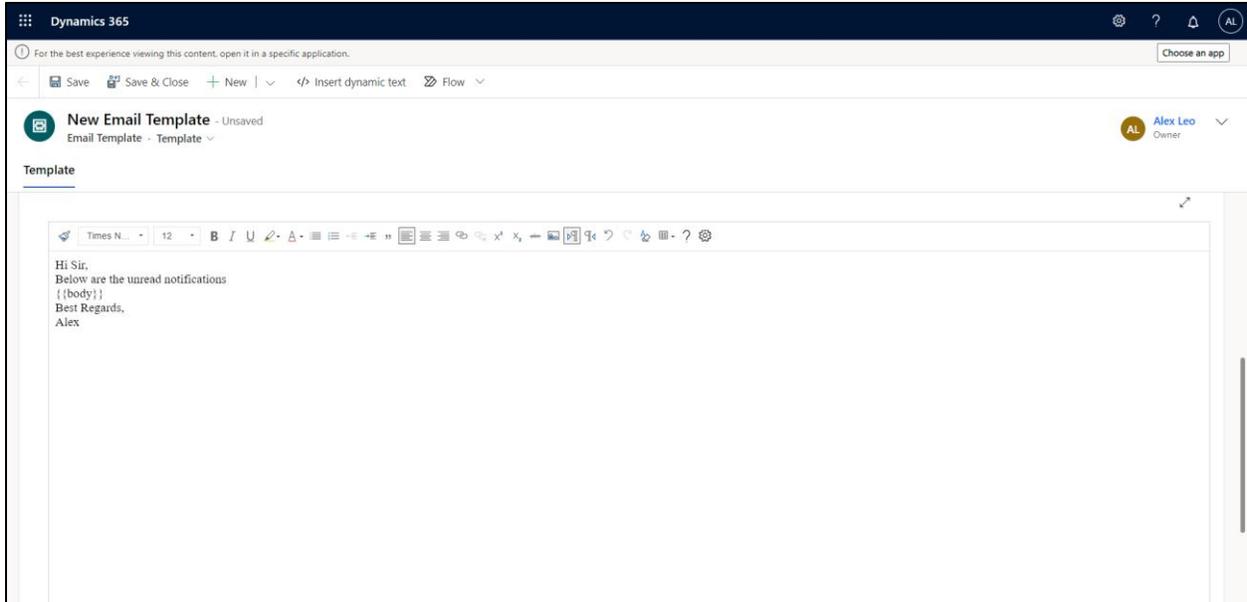
- Now, set up an email template based on your requirements. Here, we will create an email template for sending unread notifications as mail.

- 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**”.

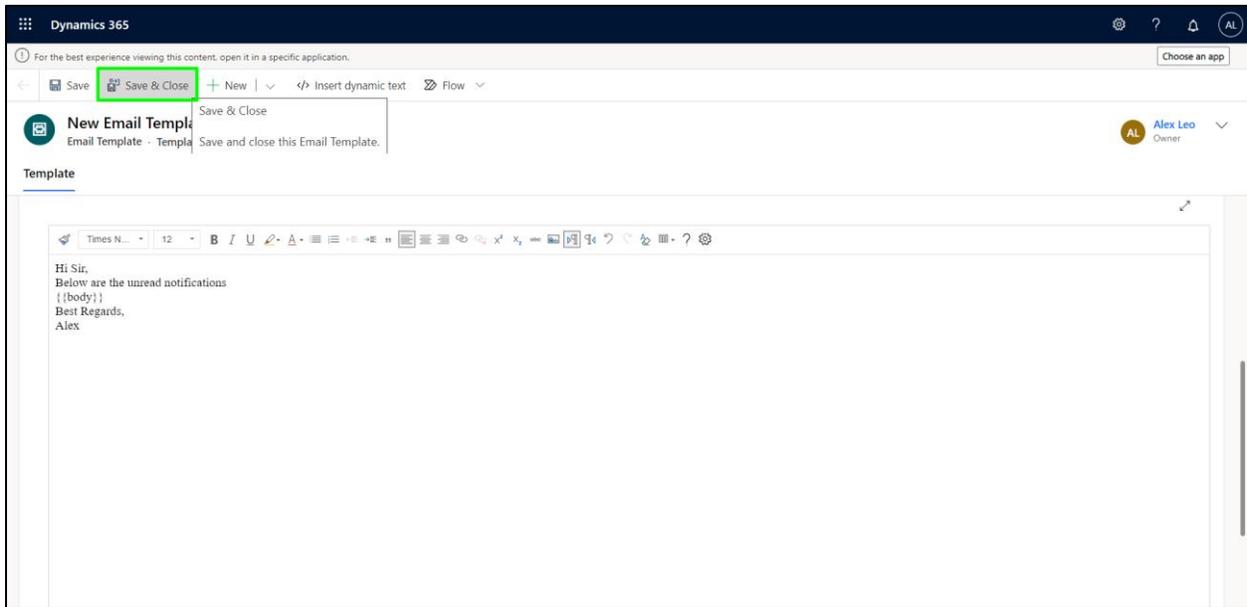


- **Email Body:** Draft an email body based on your requirements.

Alerts4Dynamics – User Manual



- Click on **“Save & Close”**.



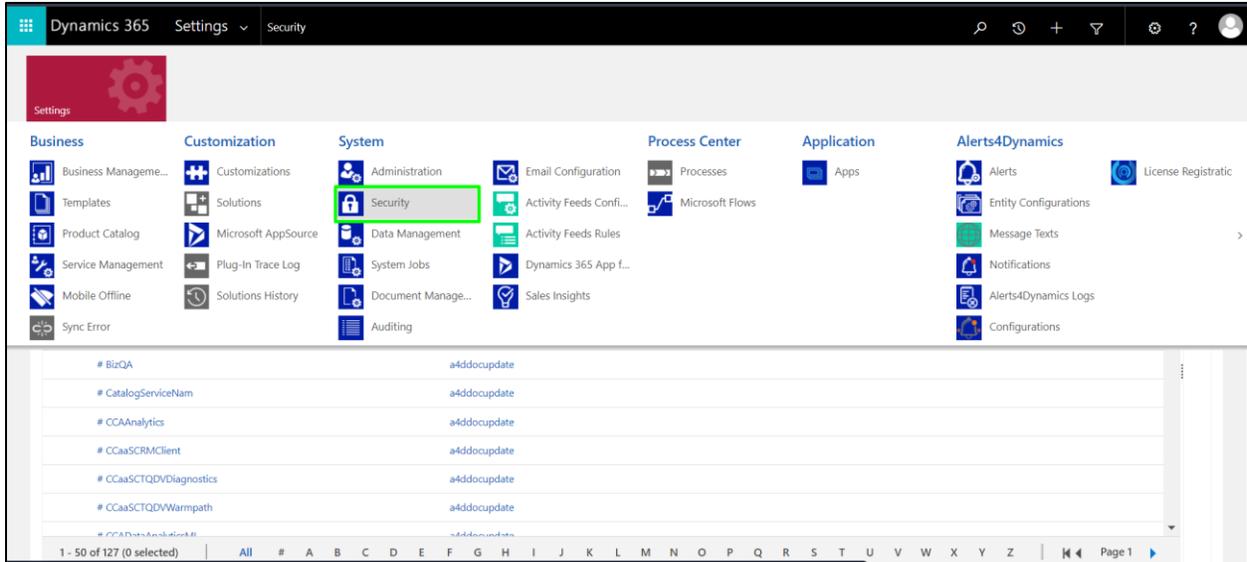
Note:

- **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}}”.**

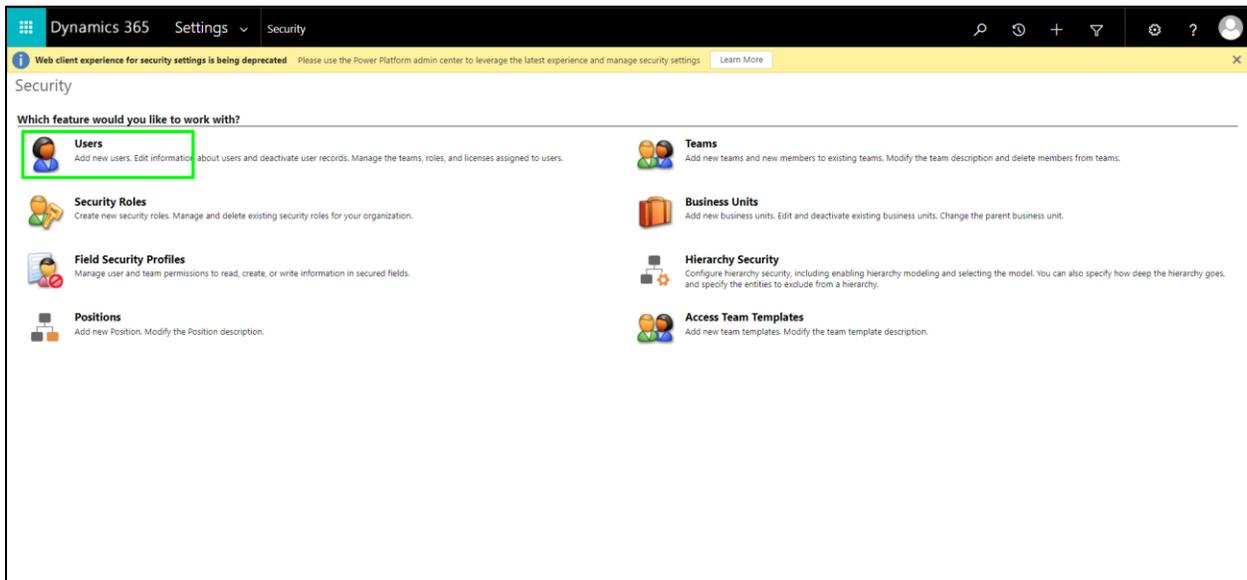
Once you have set up the email template, follow the below steps to assign the email template for sending the unread notifications to your desired CRM user.

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

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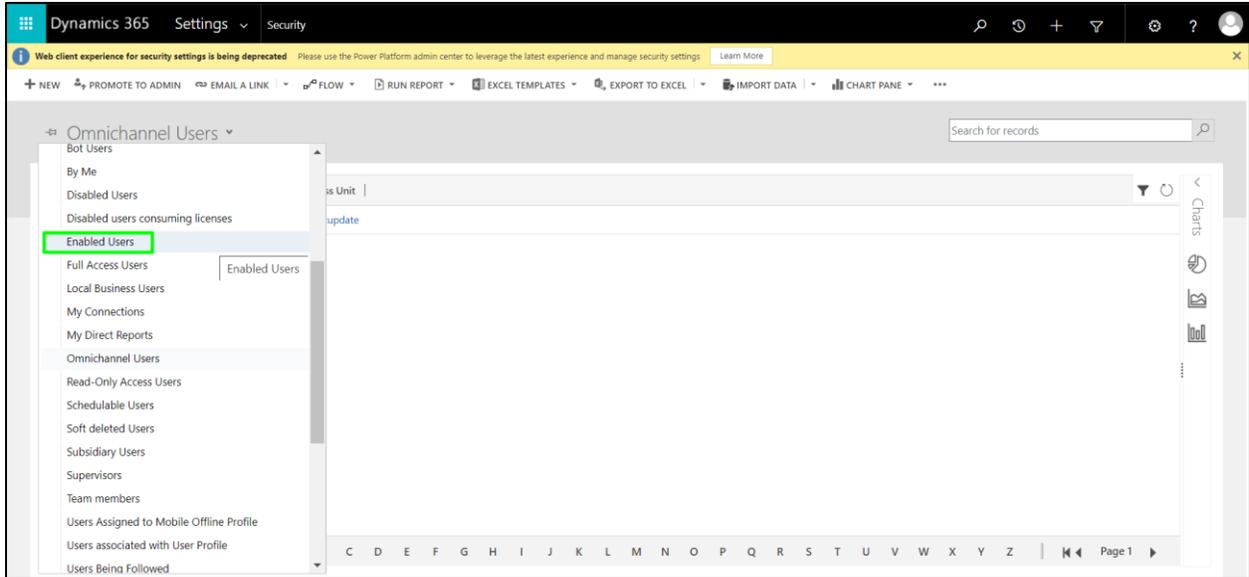


- Select “Users”.

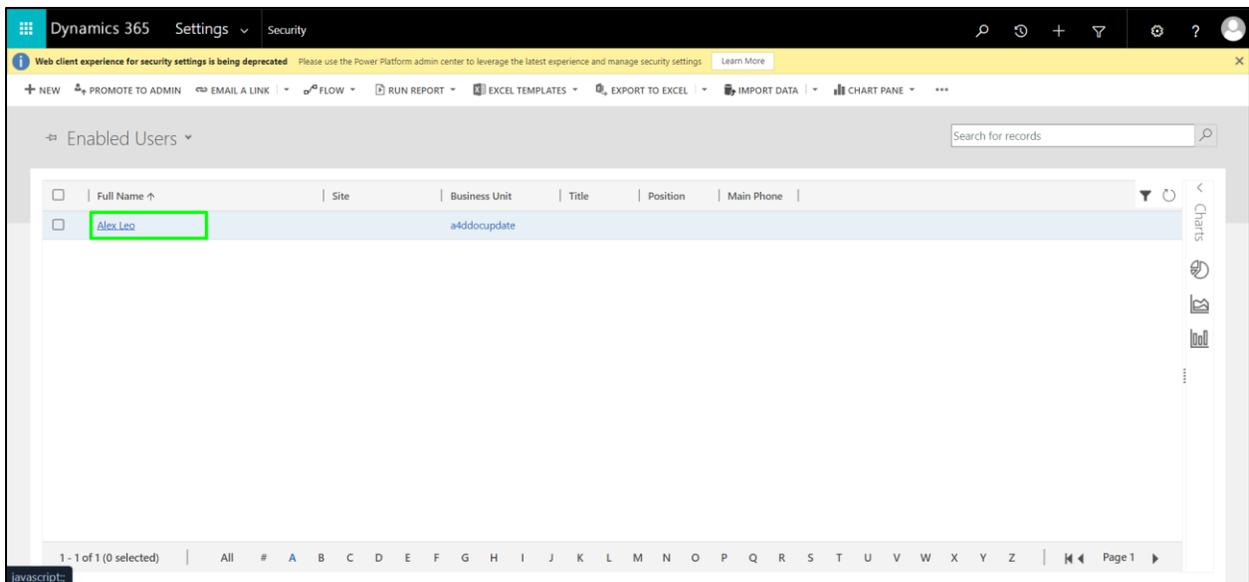


- Click on “Enabled Users”.

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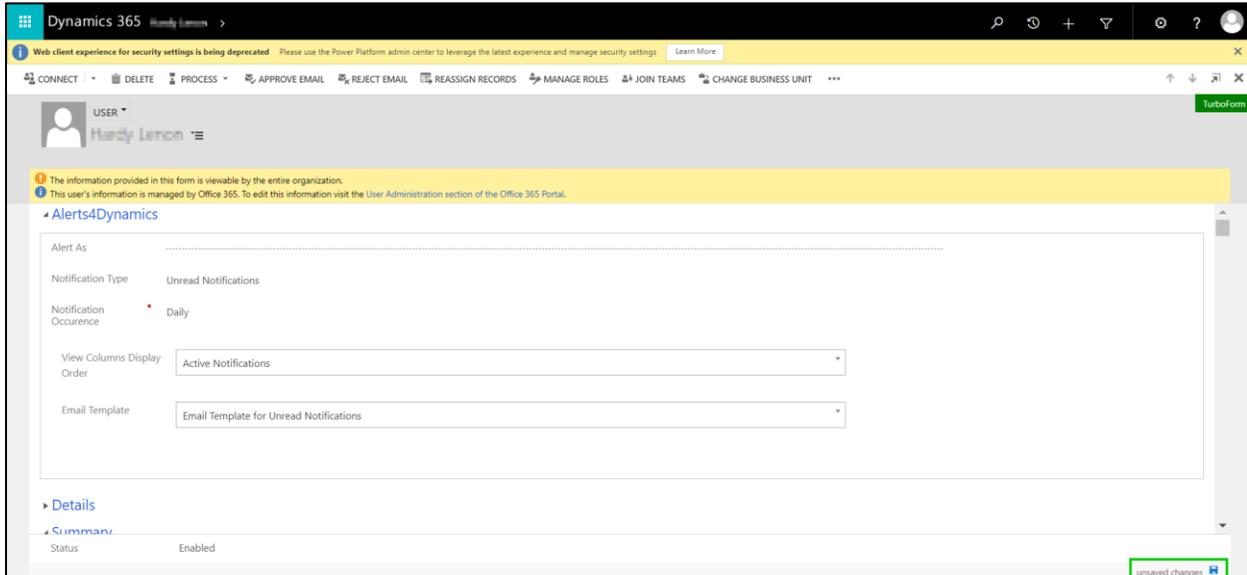


- Select the user to whom you want to assign the email template .



- 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.



The screenshot shows the Dynamics 365 user interface for configuring Alerts4Dynamics for user Hardy Lennon. The form includes the following fields:

- Alert As:** A text input field.
- Notification Type:** A dropdown menu set to "Unread Notifications".
- Notification Occurrence:** A dropdown menu set to "Daily".
- View Columns Display Order:** A dropdown menu set to "Active Notifications".
- Email Template:** A dropdown menu set to "Email Template for Unread Notifications".

Below the form, there are sections for "Details" and "Summary". The "Summary" section shows the status as "Enabled". A "Save" button is visible 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](#).

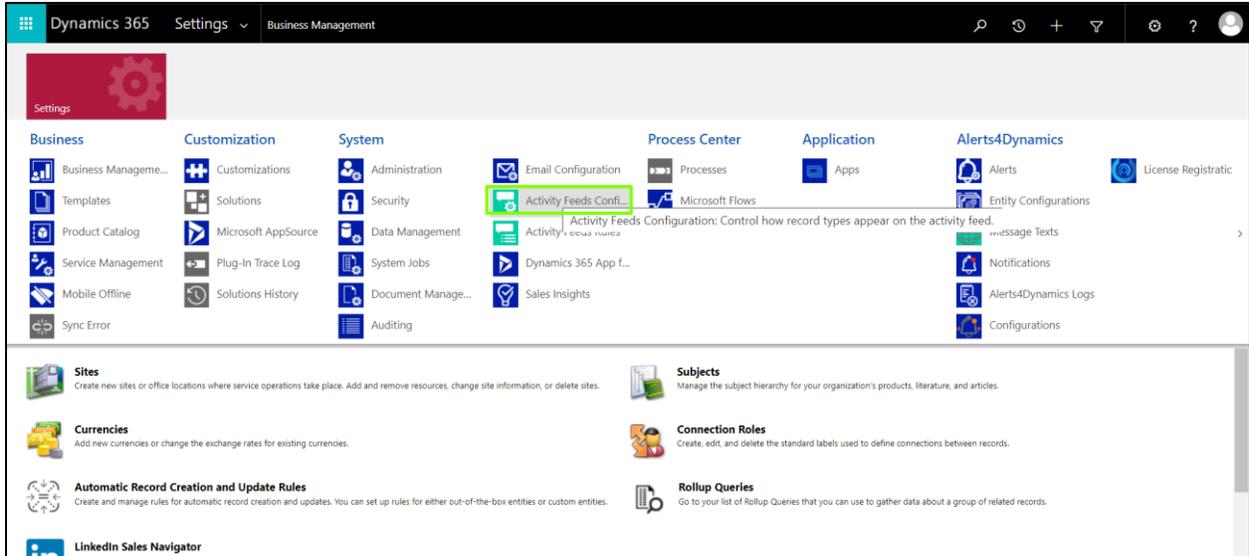
Post Notification Configuration

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

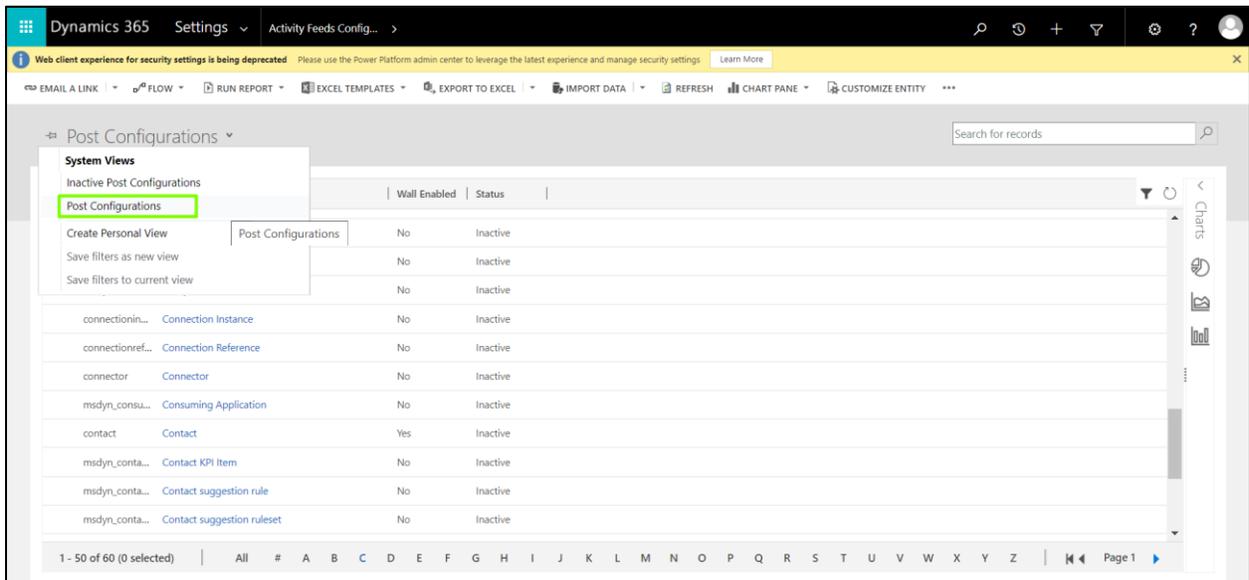
Follow the below steps to enable the post feature:

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

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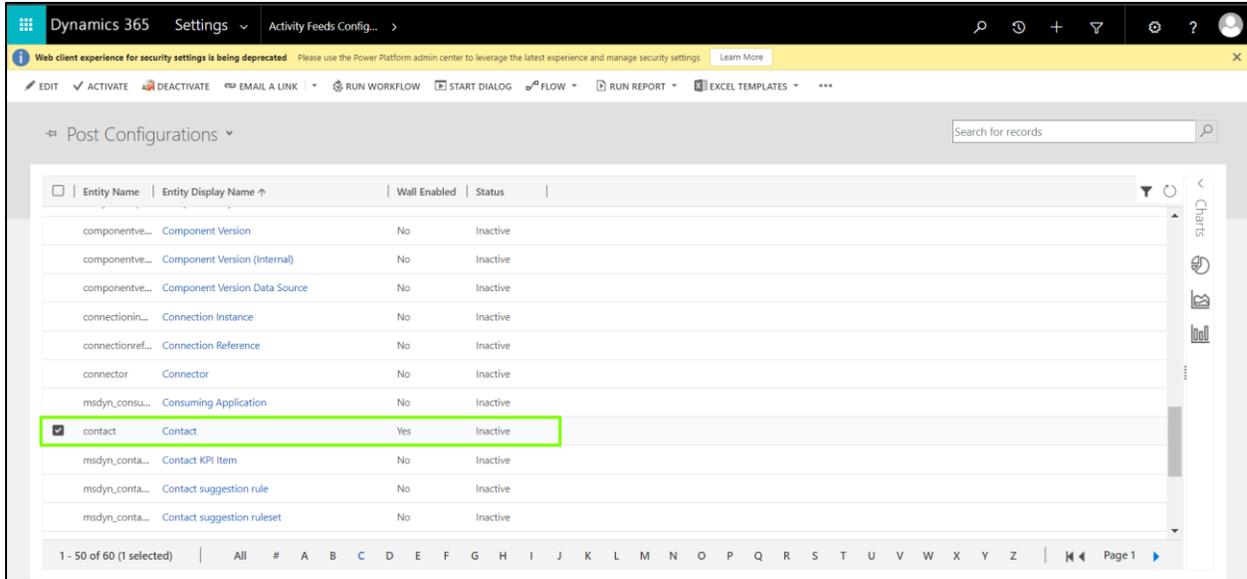


- Select “Post Configurations” in the system view.



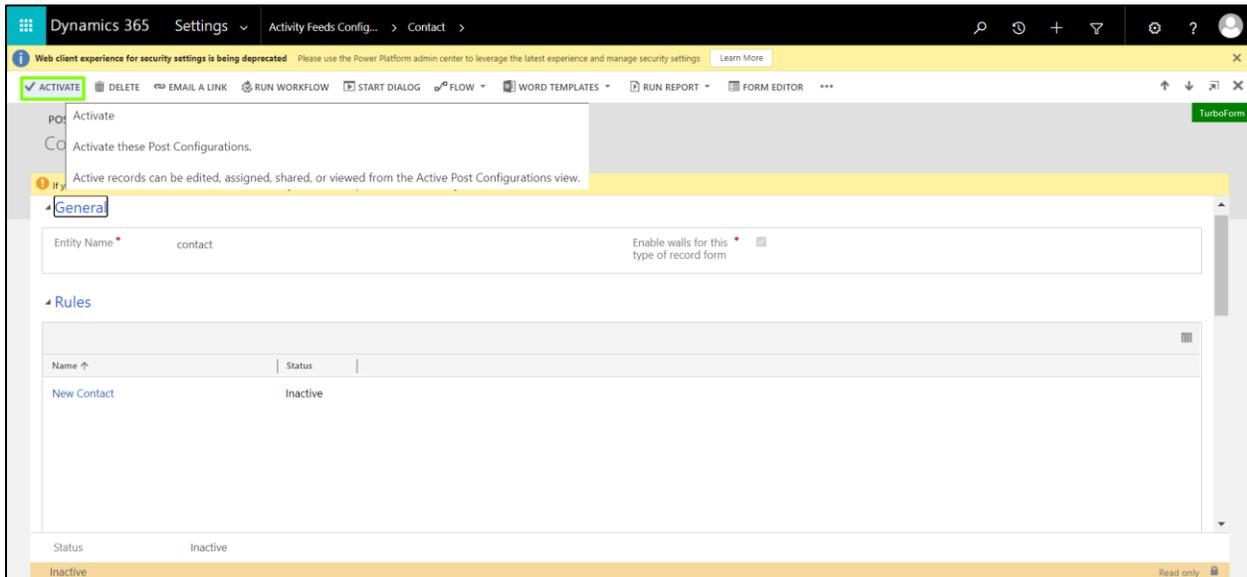
- Select your desired entity to enable the post feature for that specific entity. Here we will select ‘Contact’ entity.

Alerts4Dynamics – User Manual

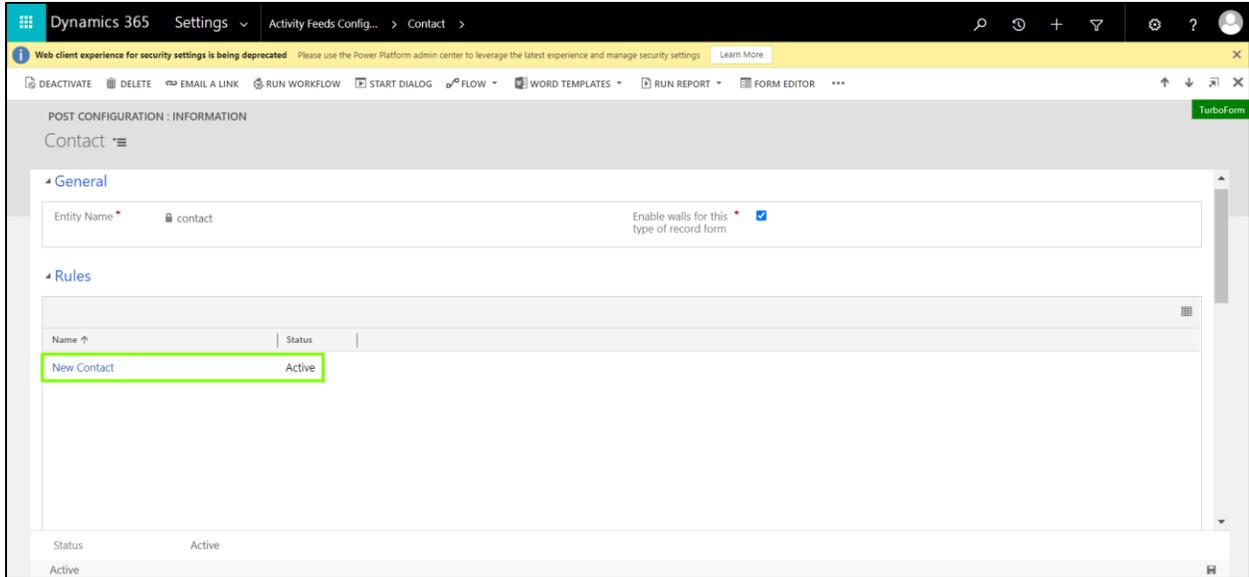


Note:

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



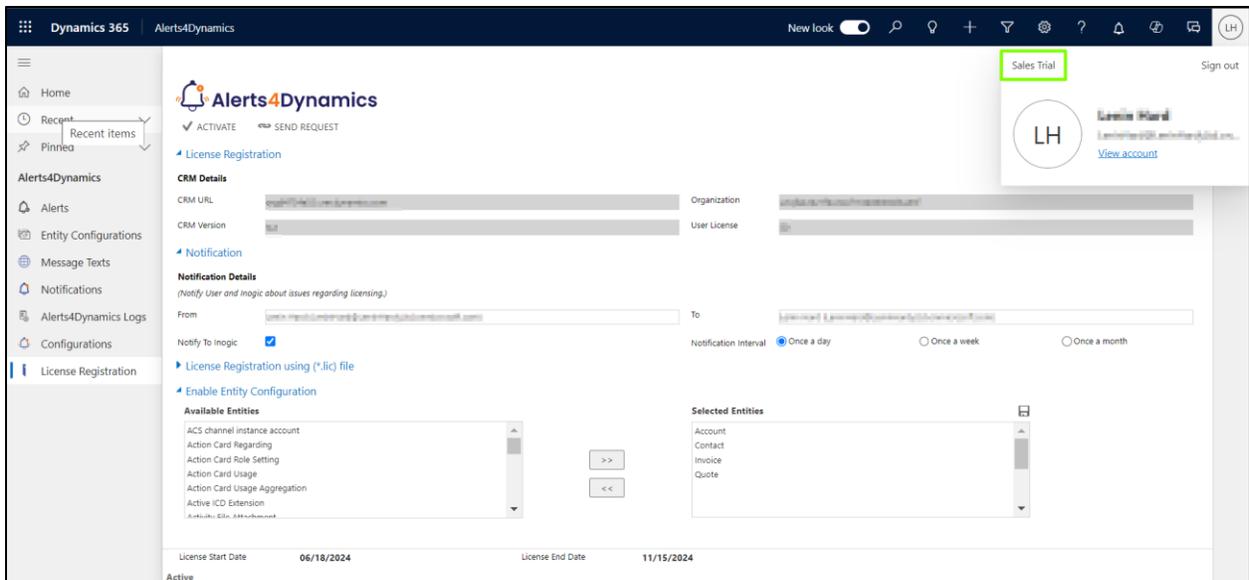
Alerts4Dynamics – User Manual



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

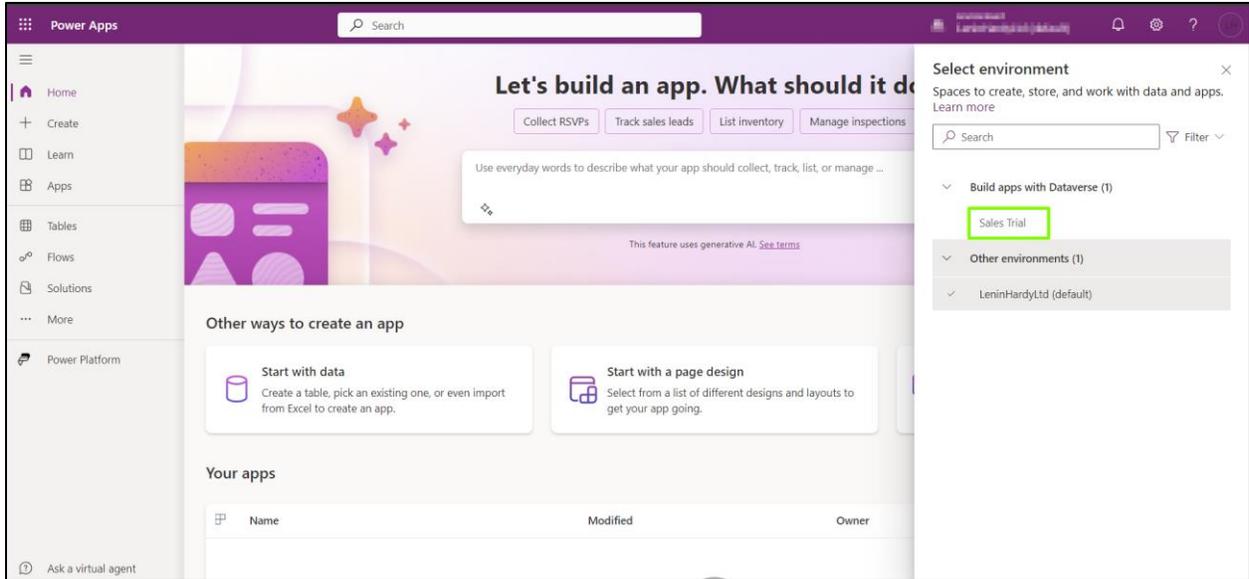
Make sure you are using the same CRM instance in PowerApps that you are using in your CRM.

- **CRM:**

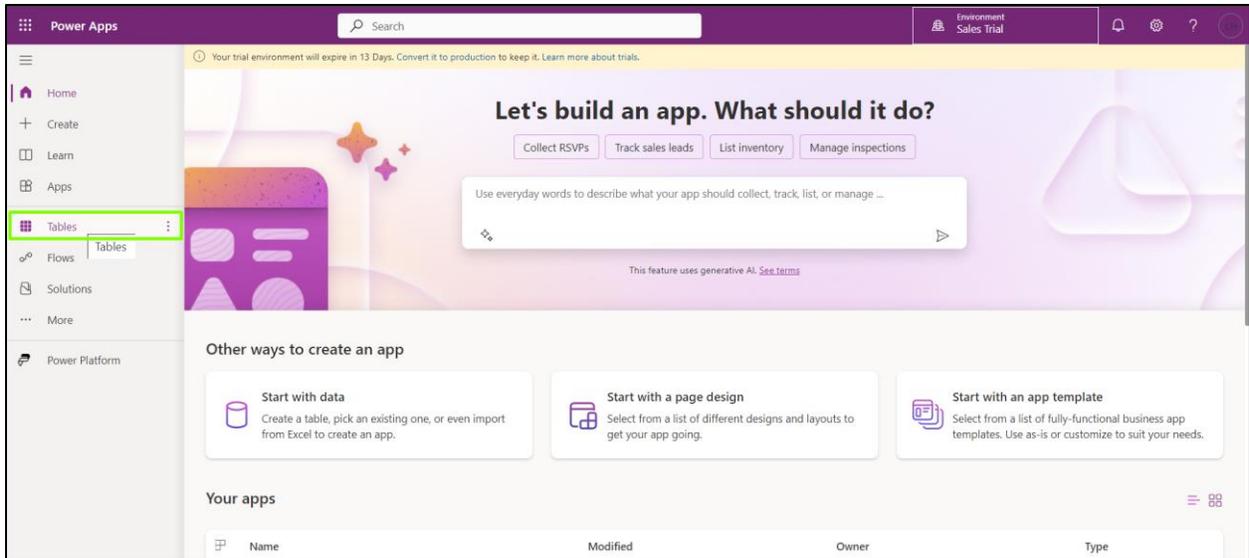


- **Powerapps:**

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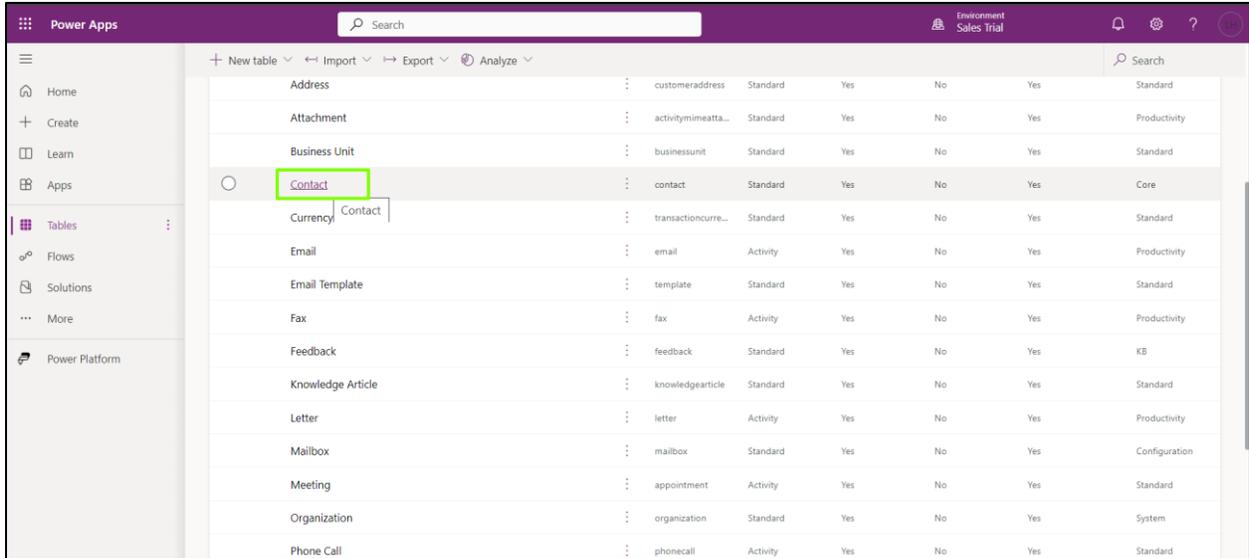


- Go to 'Tables'.

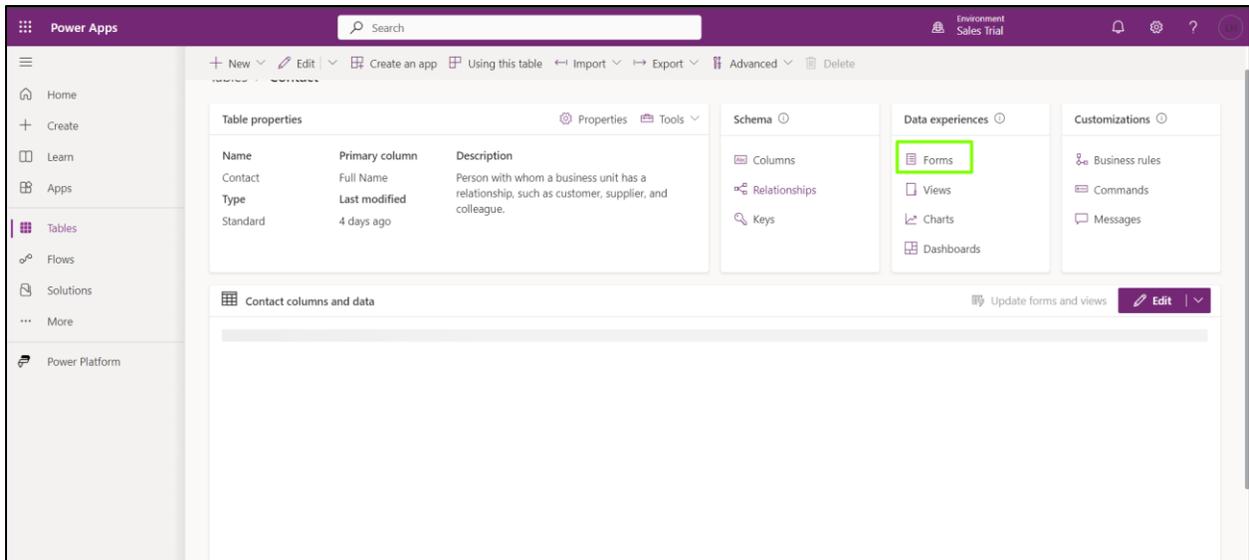


- Select 'Contact'.

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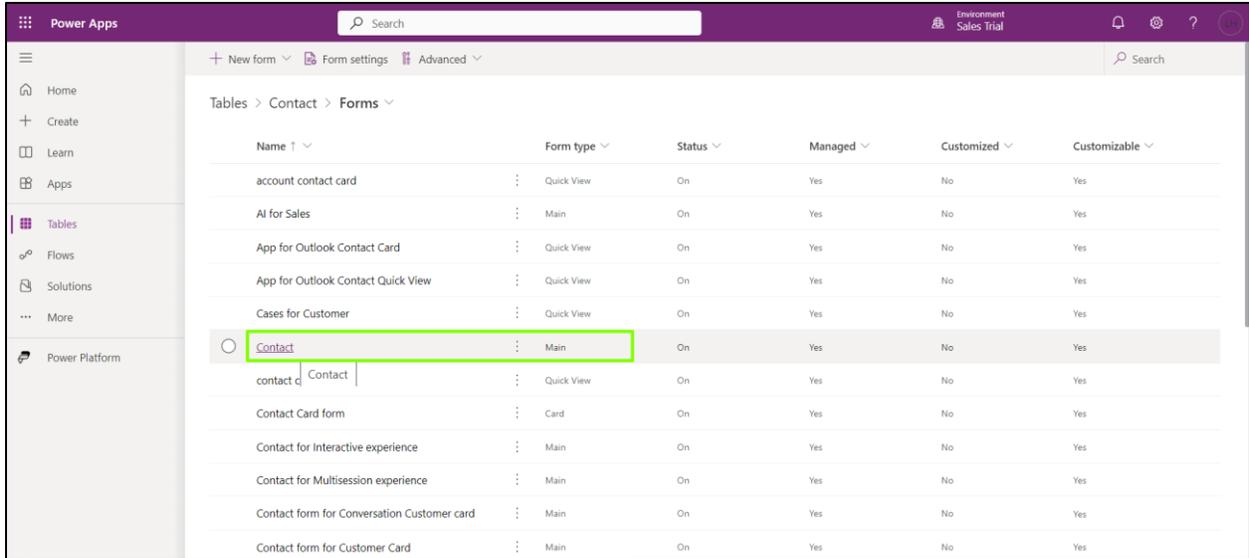


- Select 'Forms'.

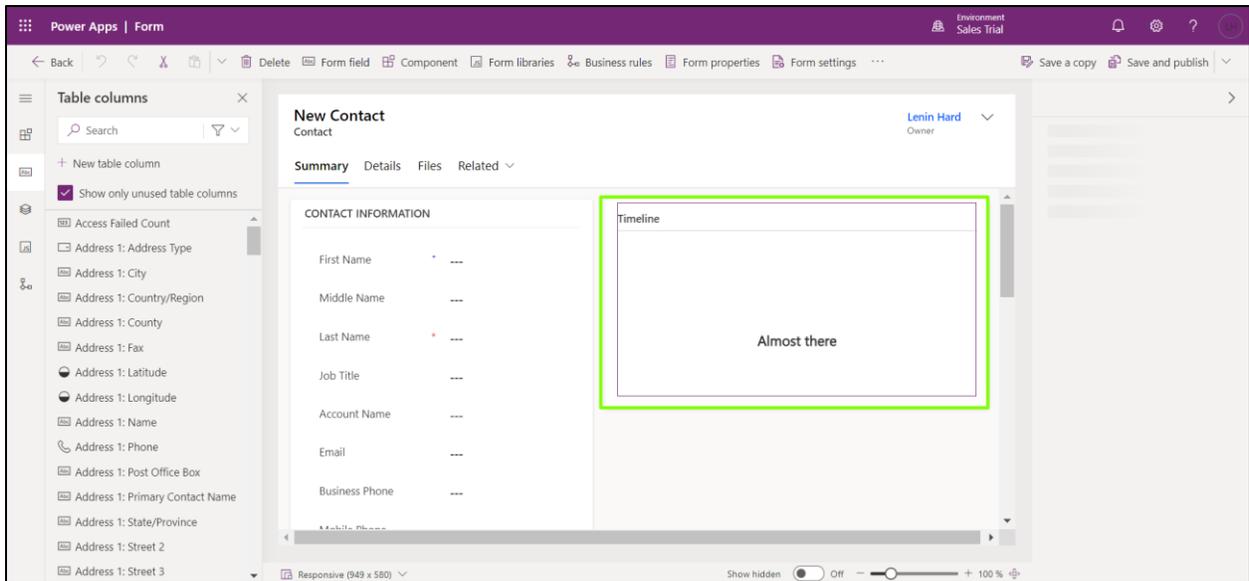


- Select main 'Contact' form.

Alerts4Dynamics – User Manual

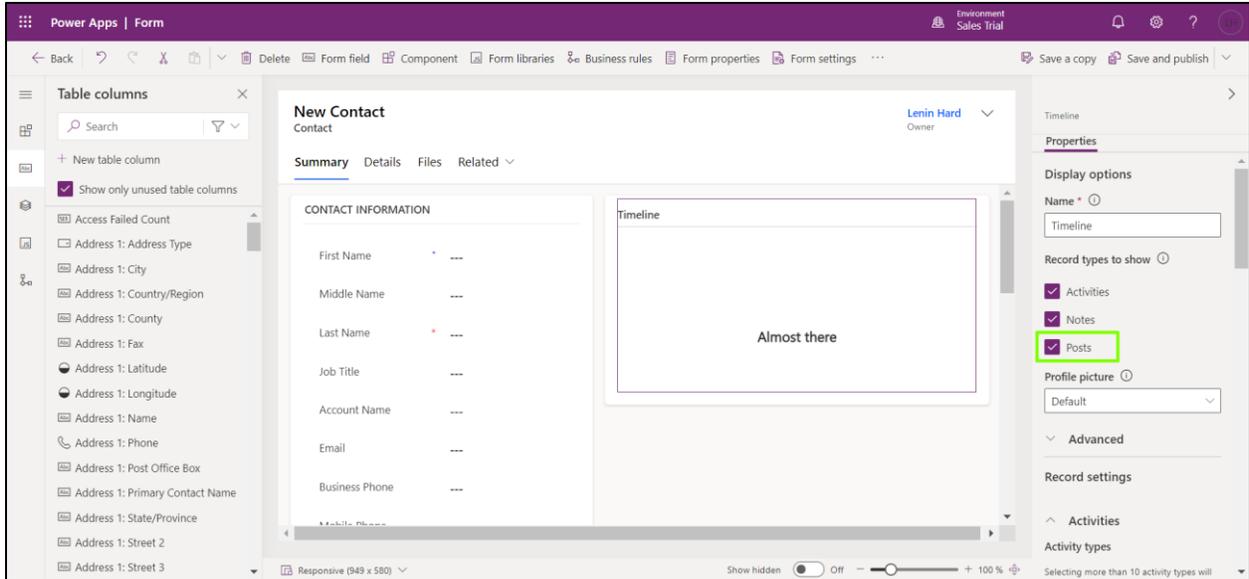


- Select 'Timeline' section.

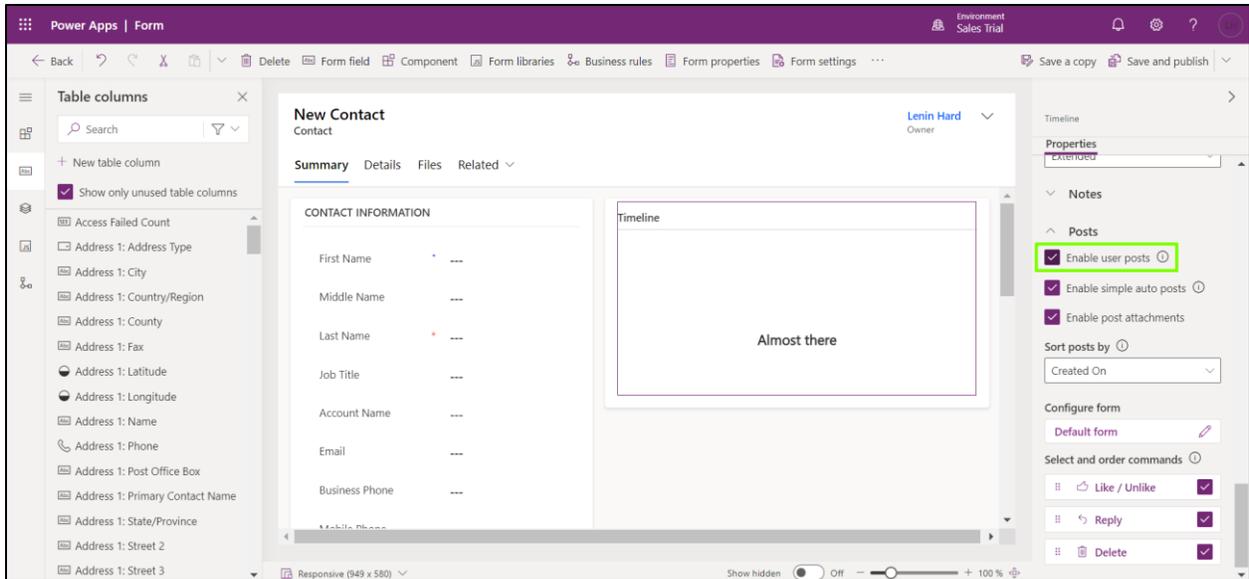


- Select 'Posts'.

Alerts4Dynamics – User Manual

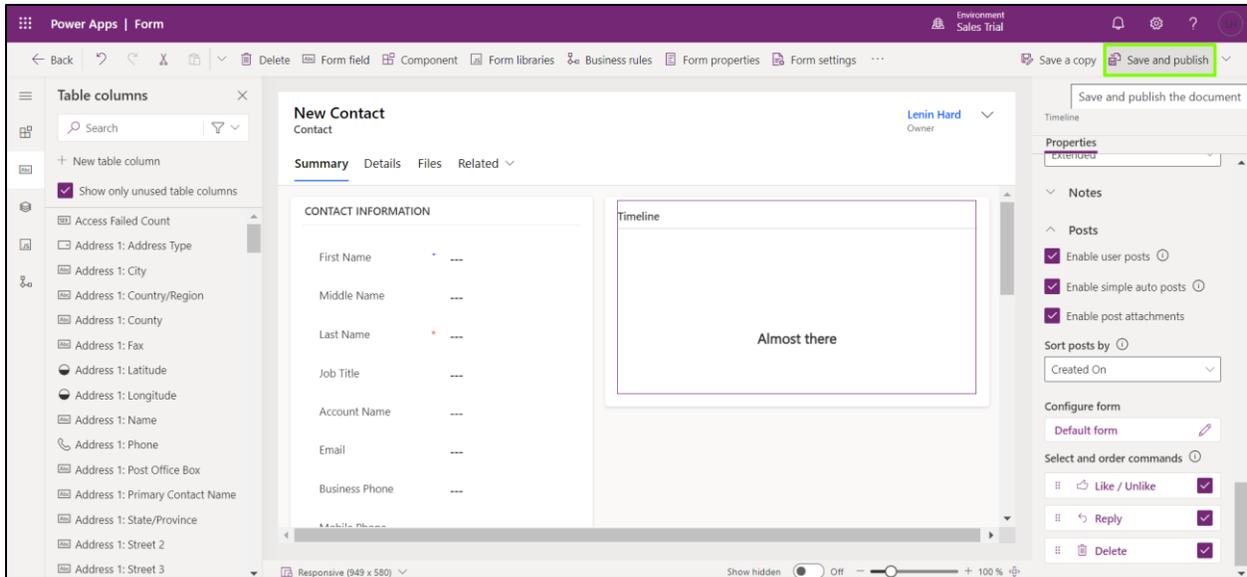


- Under posts section, choose **'Enable User Posts'**.



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

Alerts4Dynamics – User Manual

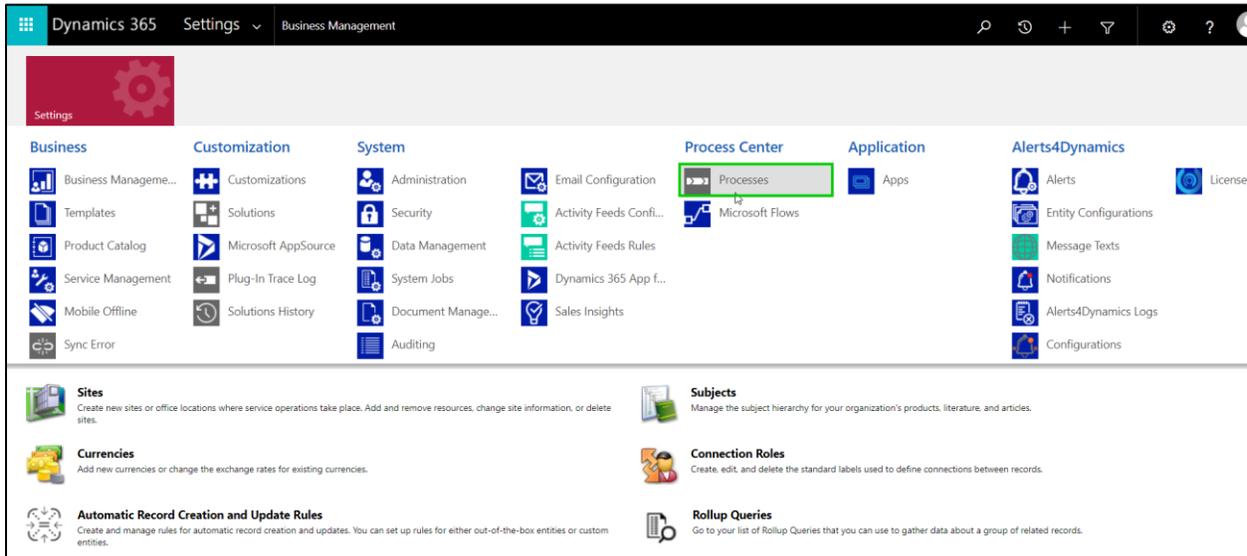


Once you have successfully configured the post notification feature for your desired entity, you need to set up a workflow in CRM to trigger post notifications for your specific needs.

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.

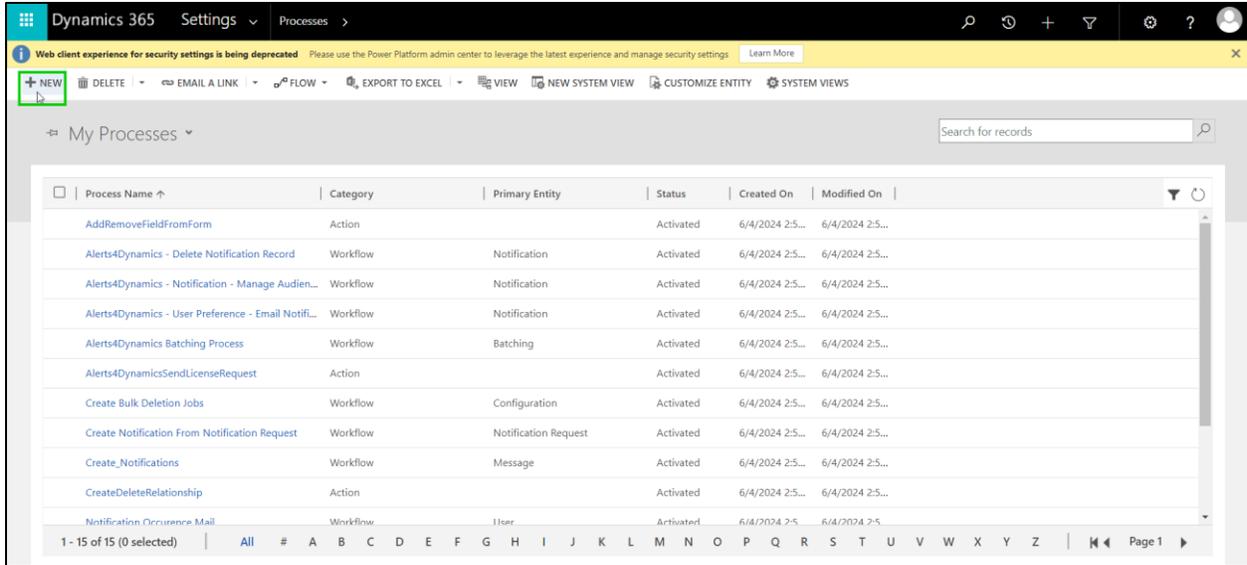
Follow the steps below to configure the workflow:

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

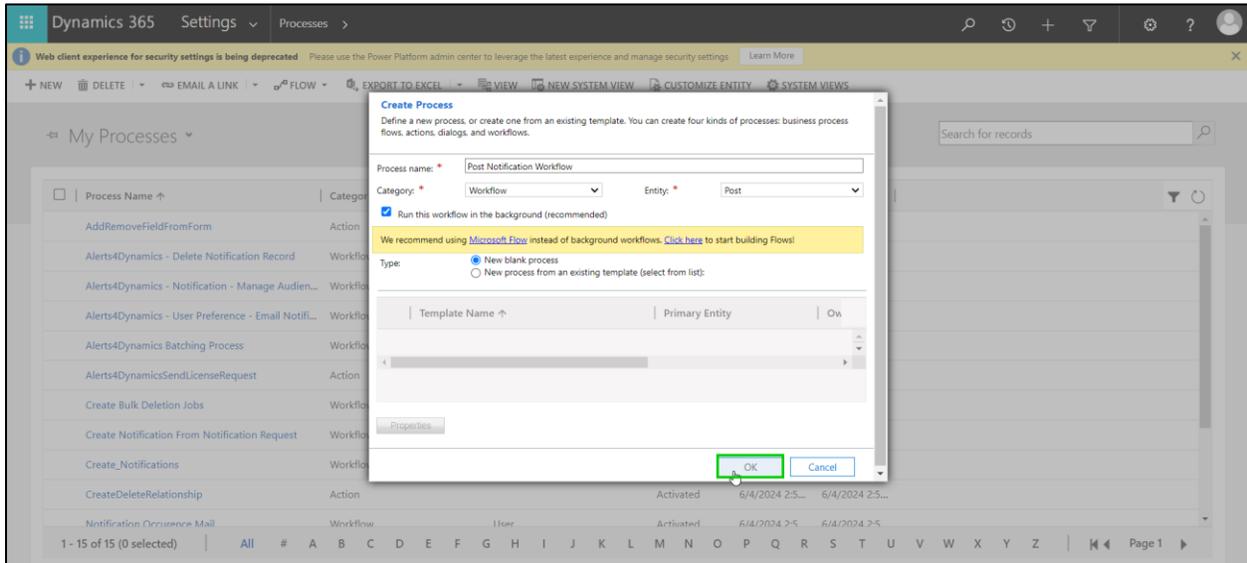


- Click on **'New'**.

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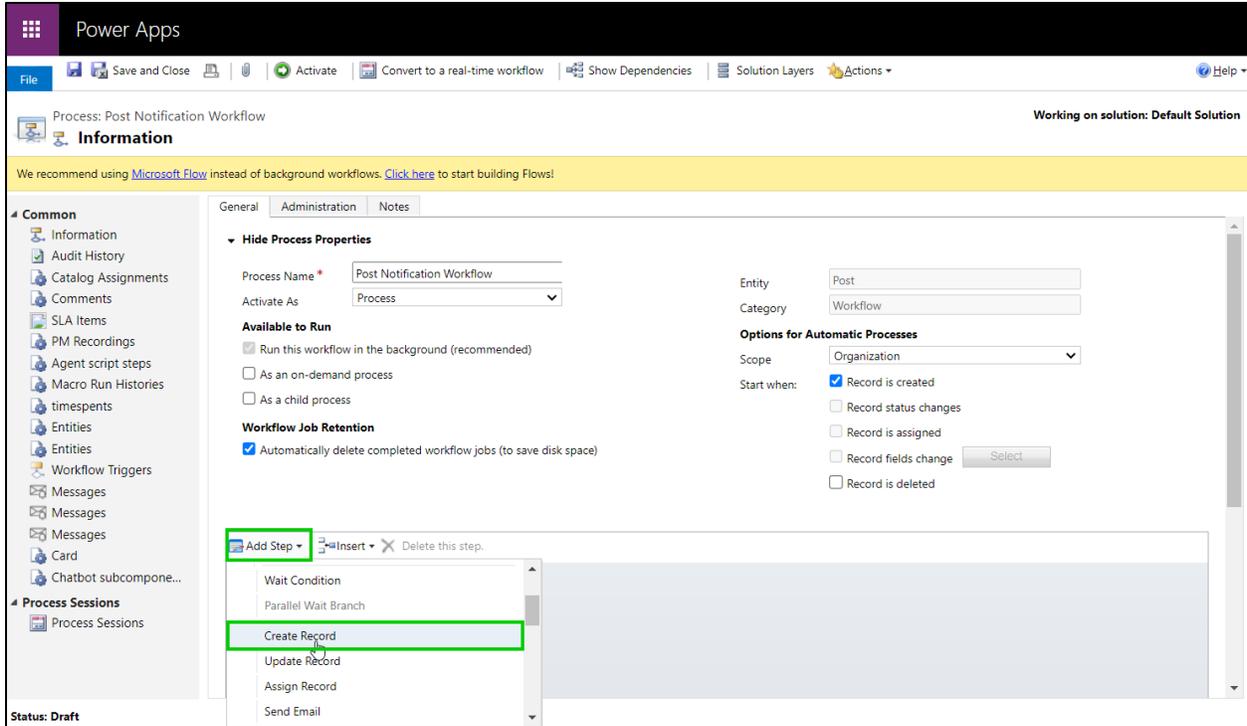


- **Process Name:** Enter a desired process name.
- **Category:** Select 'Workflow'.
- **Entity:** Select 'Post'.
- Click 'OK'.

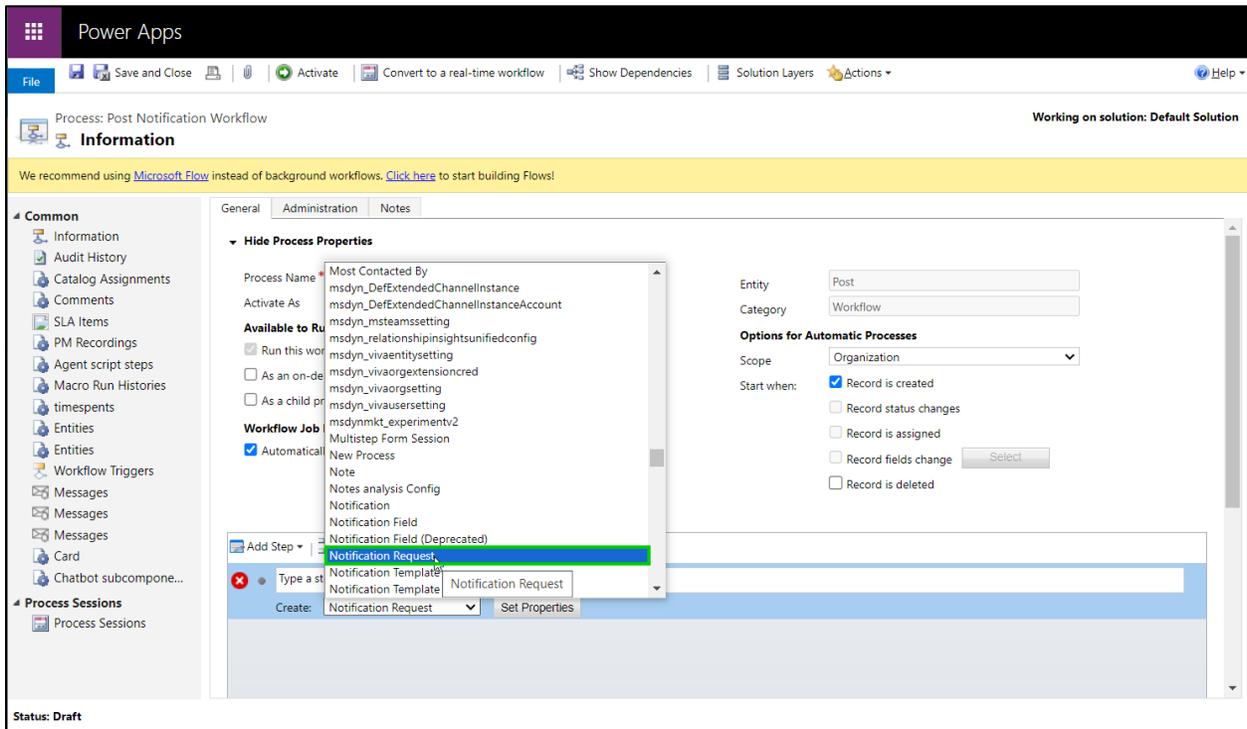


- Click on 'Add Step' and select 'Create Record'.

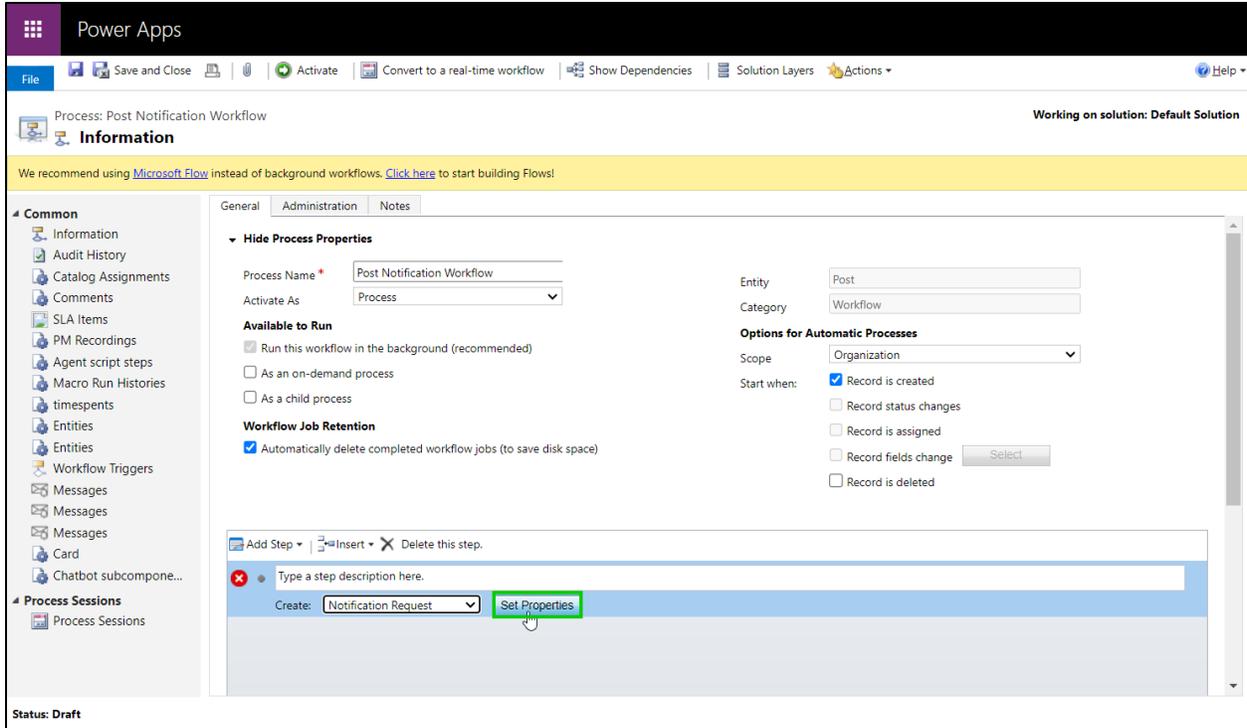
Alerts4Dynamics – User Manual



- 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'.

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File Save and Close Help

Process: Post Notification Workflow
Create Notification Request

Notification Settings

Name * Notification for New Contact

Message Text

Message Rich Text

Alert As

Pop-Up No Yes

Form Notification No Yes

Display As Dialog

Alert Level * Information

Display Until

Regarding

Notification Associated With *

Current Record Url

Audience Settings

Notification Audiences

Include Users Exclude Users

Team

Email Recipients

To - Same As Include Users Yes No

From To

CC BCC

Form Assistant

Dynamic Values

Dynamic Values

Operator:

Set to

Look for: Post

Created By

Add

Default value:

OK

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

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

File Save and Close Help

Process: Post Notification Workflow
Create Notification Request

Notification Settings

Name * Notification for New Contact

Message Text

Message Rich Text

Alert As

Pop-Up No Yes

Form Notification No Yes

Display As Dialog

Alert Level * Information

Display Until

Regarding **Regarding (Contact)**

Notification Associated With *

Current Record Url

Audience Settings

Notification Audiences

Include Users Exclude Users

Team

Email Recipients

To - Same As Include Users Yes No

From To

CC BCC

Form Assistant

Dynamic Values

Dynamic Values

Operator:

Set to

Look for: Regarding (Contact)
Contact

Add

Default value:

OK

Alerts4Dynamics – User Manual

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

The screenshot shows the 'Create Notification Request' form in the Alerts4Dynamics interface. The 'Regarding' field is highlighted with a green box and contains the text 'ContactRegarding (Contact)'. The 'Form Assistant' panel on the right side of the form is open, showing the 'Add' and 'OK' buttons highlighted with green boxes. The form includes sections for 'Notification Settings', 'Audience Settings', and 'Related Record Settings'.

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

The screenshot shows the 'Create Notification Request' form in the Alerts4Dynamics interface. The 'Regarding' field is highlighted with a green box and contains the text 'ContactRegarding (Contact)'. The 'Form Assistant' panel on the right side of the form is open, showing the 'Look for' dropdown menu open, with 'Regarding (Contact)' selected and highlighted with a green box. The form includes sections for 'Notification Settings', 'Audience Settings', and 'Related Record Settings'.

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

Alerts4Dynamics – User Manual

Process: Post Notification Workflow
Create Notification Request

Notification Settings

Name * [Notification for New Contact]
Message Text []
Message Rich Text []

Alert As

Pop-Up No Yes
Form Notification No Yes
Display As [Dialog] User Preference No Yes
Alert Level * [Information]
Display Until []
Regarding [Contact:Regarding (Contact)]

Notification Associated With [Record URL(Dynamic)]

Current Record Url []

Audience Settings

Notification Audiences

Include Users [] Exclude Users []
Team []

Email Recipients

To - Same As Include Users Yes No
From [] To []
CC [] BCC []

Related Record Settings

Primary Record Reference []
Related Notification Audiences []

Form Assistant

Dynamic Values
Dynamic Values
Operator:
Set to:
Look for:
Regarding (Contact)
Record URL(Dynamic)
Profile Last Activity
Profile Modified On
Public Profile Copy
Business Contact On
Role
SLA
Record URL(Dynamic)
Salutation
Security Stamp
Send Marketing Materials
Shipping Method
Spouse/Partner Name
Status
Status Reason
Suffix
Teams Followed
Telephone 3
Territory
Time Spent by me

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

Process: Post Notification Workflow
Create Notification Request

Notification Settings

Name * [Notification for New Contact]
Message Text []
Message Rich Text []

Alert As

Pop-Up No Yes
Form Notification No Yes
Display As [Dialog] User Preference No Yes
Alert Level * [Information]
Display Until []
Regarding [Contact:Regarding (Contact)]

Notification Associated With [Record URL(Dynamic):Regarding (Contact)]

Current Record Url []

Audience Settings

Notification Audiences

Include Users [] Exclude Users []
Team []

Email Recipients

To - Same As Include Users Yes No
From [] To []
CC [] BCC []

Related Record Settings

Primary Record Reference []
Related Notification Audiences []

Form Assistant

Dynamic Values
Dynamic Values
Operator:
Set to:
Look for:
Regarding (Contact)
Record URL(Dynamic)
Profile Last Activity
Profile Modified On
Public Profile Copy
Business Contact On
Role
SLA
Record URL(Dynamic)
Salutation
Security Stamp
Send Marketing Materials
Shipping Method
Spouse/Partner Name
Status
Status Reason
Suffix
Teams Followed
Telephone 3
Territory
Time Spent by me

Default values:
OK

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

Alerts4Dynamics – User Manual

The screenshot shows the 'Create Notification Request' form. The 'Current Record Url' field is highlighted with a green box. The 'Form Assistant' dropdown menu is open, showing a list of dynamic values with 'Record URL(Dynamic)' selected. The form includes sections for Notification Settings, Audience Settings, and Related Record Settings.

- And then select '**Record URL (Dynamic)**'.

The screenshot shows the 'Create Notification Request' form. The 'Current Record Url' field is highlighted with a green box. The 'Form Assistant' dropdown menu is open, showing a list of dynamic values with 'Record URL(Dynamic)' selected. The form includes sections for Notification Settings, Audience Settings, and Related Record Settings.

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

Alerts4Dynamics – User Manual

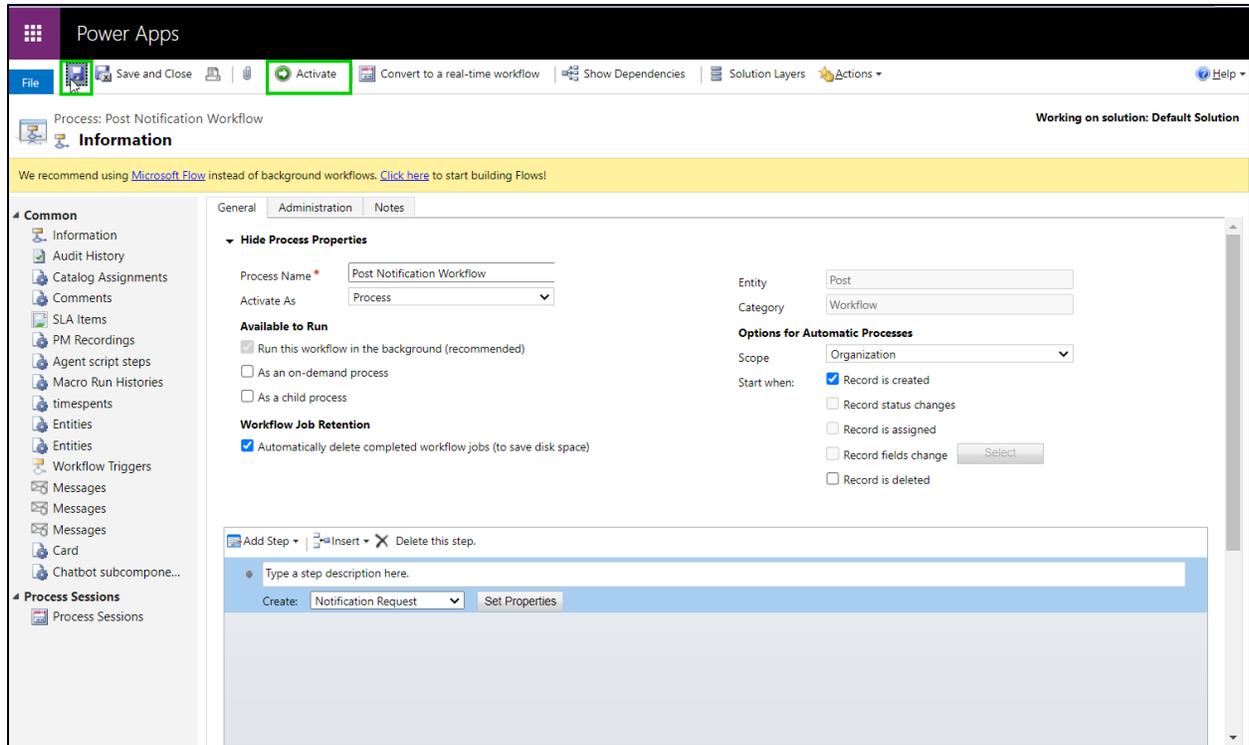
The screenshot shows the 'Create Notification Request' form. The 'Current Record Uri' field is highlighted with a green box. The 'Form Assistant' panel on the right shows the 'Record Uri(Dynamic|Post)' field also highlighted with a green box. The 'Form Assistant' panel also shows an 'Add' button and an 'OK' button.

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

- Click on 'Save and Close'.

The screenshot shows the 'Create Notification Request' form. The 'Save and Close' button is highlighted with a green box. The 'Form Assistant' panel on the right shows the 'Record Uri(Dynamic|Post)' field highlighted with a green box. The 'Form Assistant' panel also shows an 'Add' button and an 'OK' button.

- 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'.

Alerts4Dynamics – User Manual

Rule based alert
Alert

General Related

Name * Rule based alert

Alert Type * Rule Based

Entity Configuration * account

Rule Mode * Simple

View * My Active Accounts

Interval

Poll Interval * X Hour(s) Interval * 2

2) Add a message to this alert.

Rule based alert
Alert

General Related

Entity Configuration * account

Rule Mode * Simple

View * My Active Accounts

Interval

Poll Interval * X Hour(s) Interval * 2

Messages

+ New Message Refresh Run Report

Message Text Alert As Display As Alert Level Process Start Date Process End Date

Add New Message

Add a related Message to this record.

No data available.

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

Rule based alert - My Active Accounts - Saved
Message

Active Status

General Notification Related

Font Size B I U A- A+ [Rich Text Editor Icons]

Language * English

Notification Configuration

Alert As * Form Notification Select or search options

Display As * Dialog

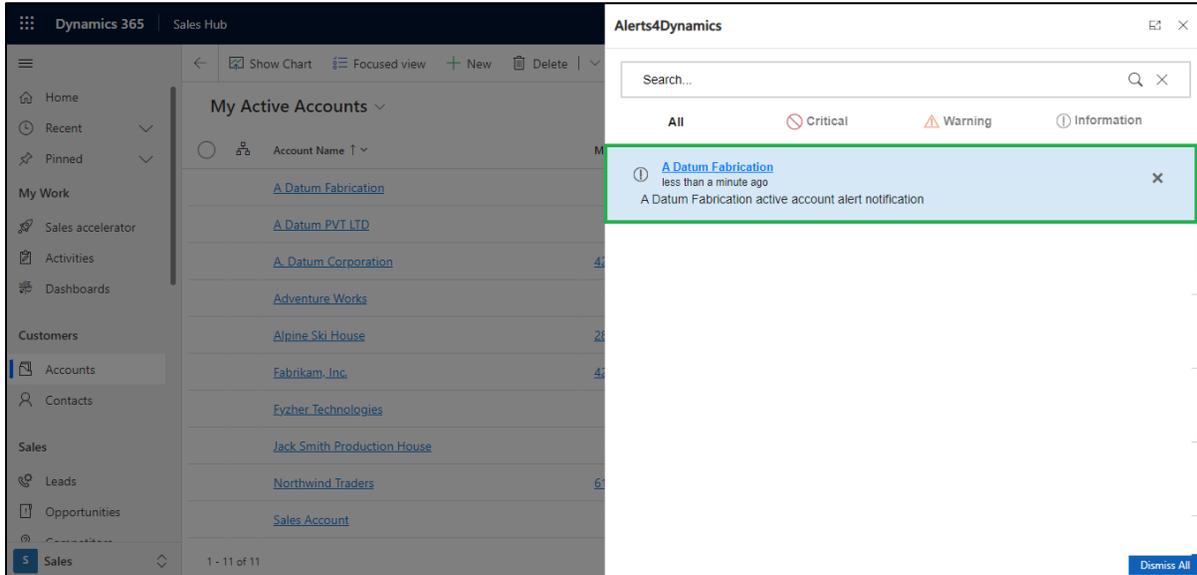
Alert Level * Information

Display Until ---

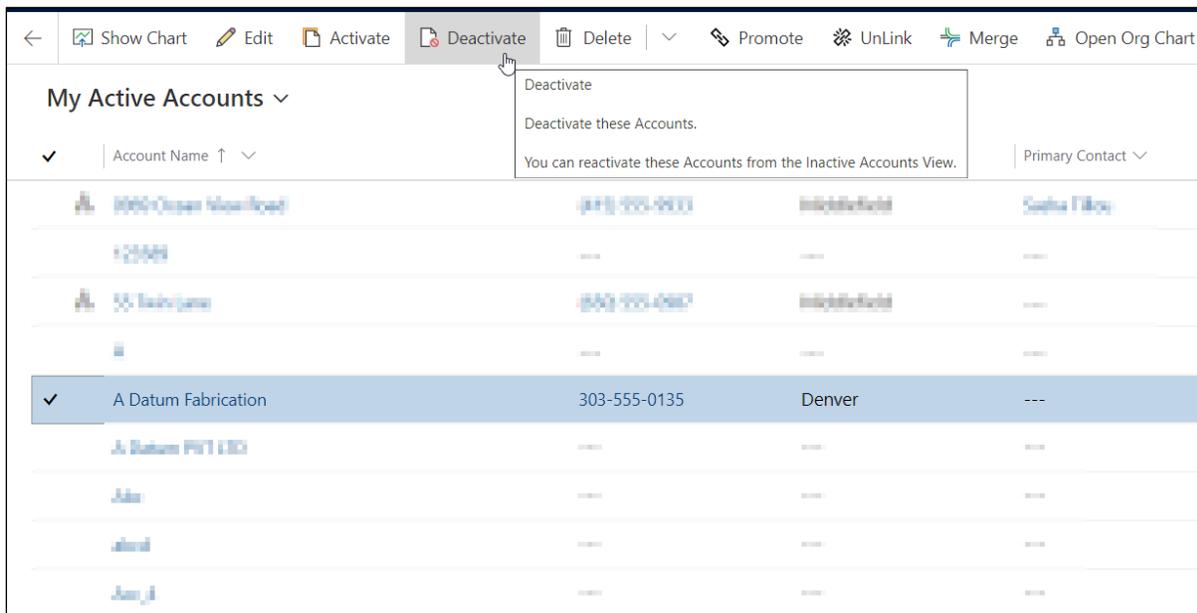
Is Dismissible * Yes

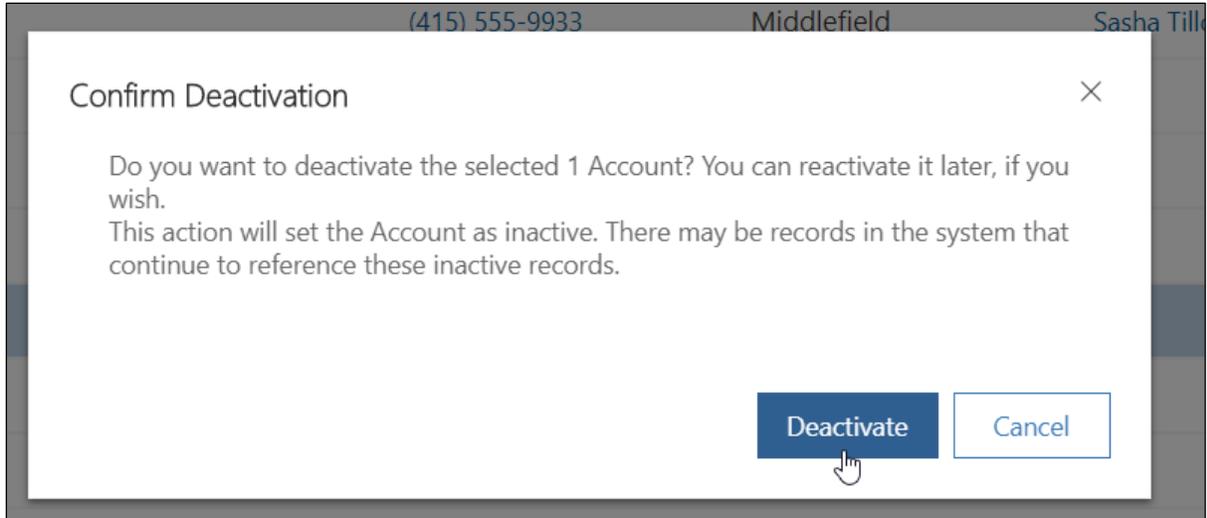
Auto Dismissible * Yes

- 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’**.



- 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.)*

Inactive Accounts ▾				
✓	Account Name ↑ ▾	Primary Contact ▾	Main Phone ▾	Address 1: City ▾
	A Datum Fabrication	---	303-555-0135	Denver

← + New Activate Open Org Chart Connect ▾ Assign Email a Link Delete Refresh Process ▾ Geo Code Share ⋮

Read-only This record's status: Inactive

AD A Datum Fabrication
Account · Account ▾

--- Annual Revenue --- Number of Employees --- Completeness ▾

Summary Accounting Details Project Price Lists Details Assets and Locations Field Service Scheduling Files Related

ACCOUNT INFORMATION

Account Name*
A Datum Fabrication

Phone
303-555-0135

Email
...

Fax
...

Website

Timeline

Search timeline

Enter a note...

Auto-post on A Datum Fabrication
Account: Created By **...** 9/25/2020 3:19 PM ▾

Primary Contact

CONTACTS

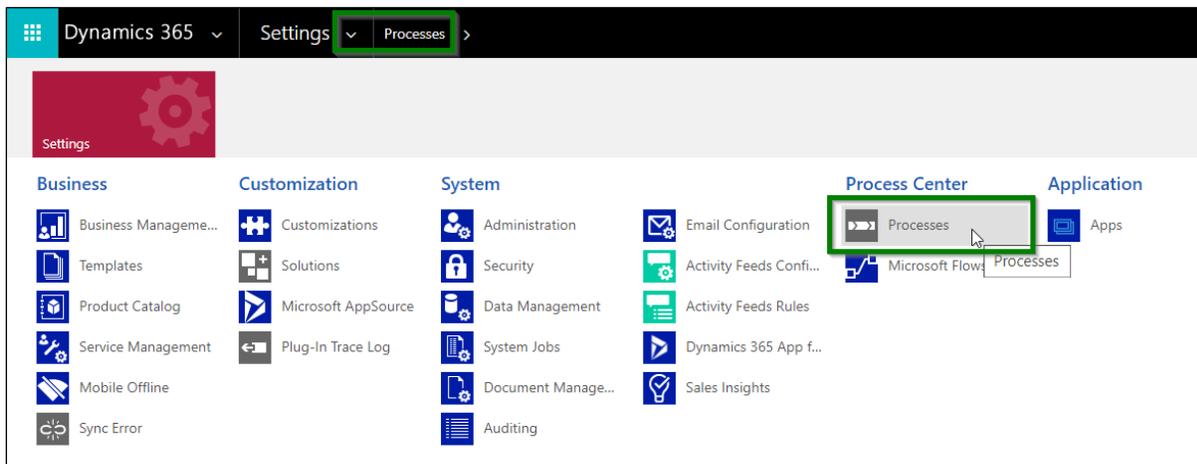
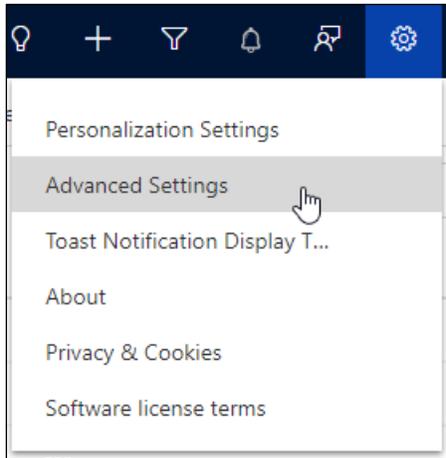
No data available.

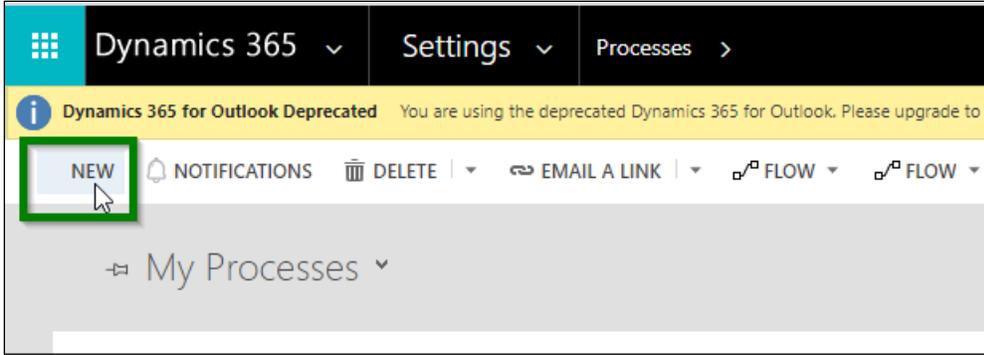
Event-based Alert:

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.

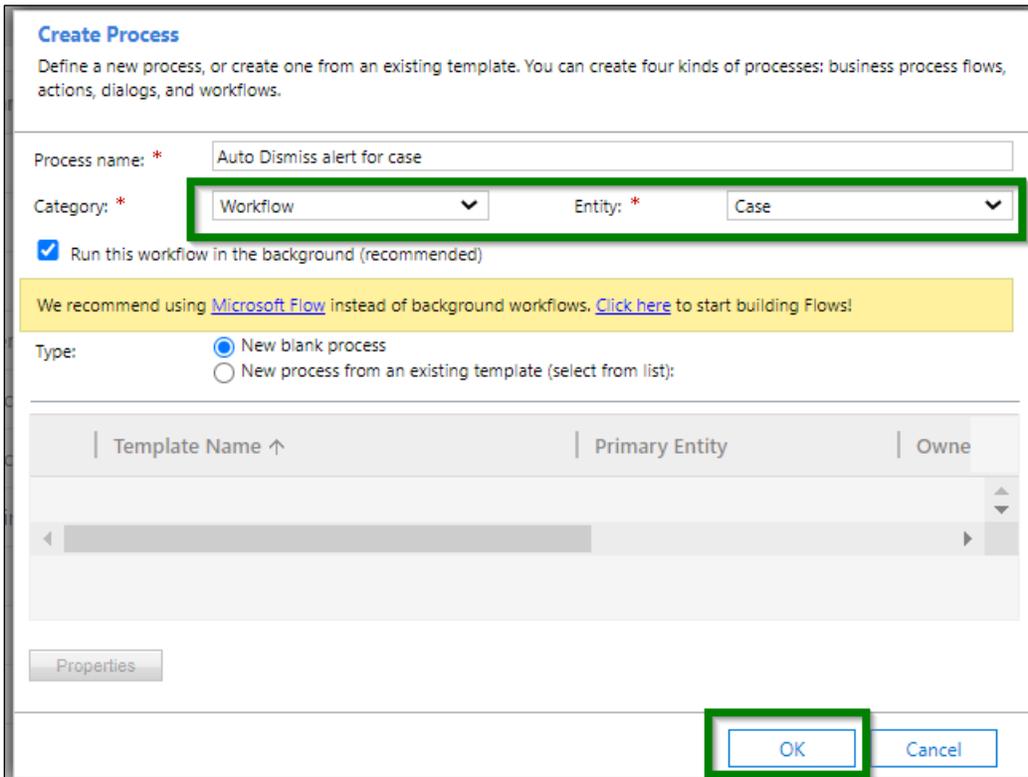
Steps to Auto-dismiss Alerts

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



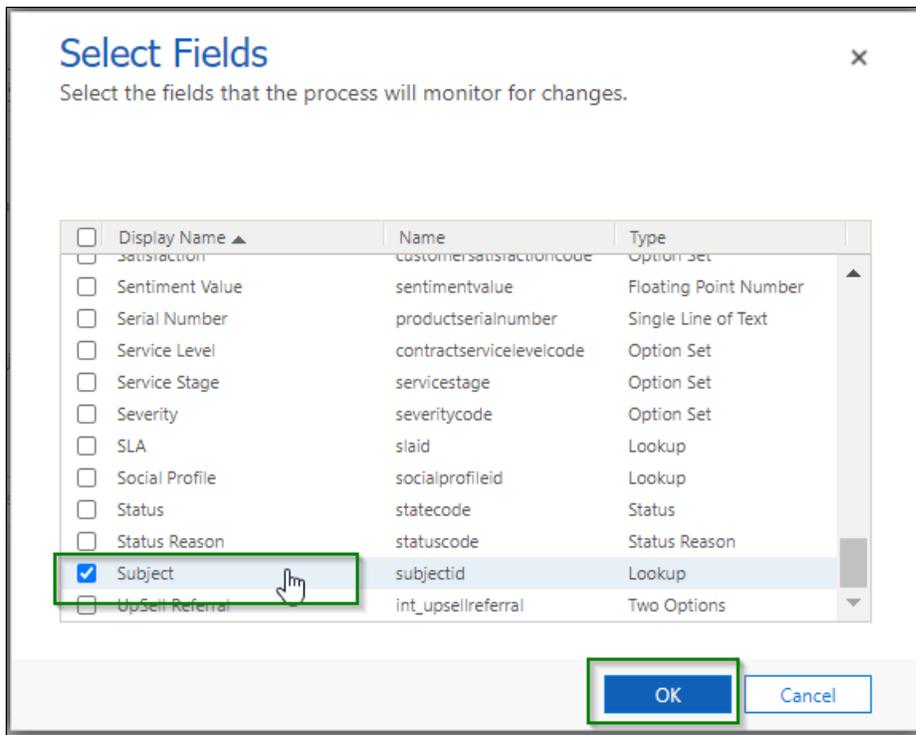
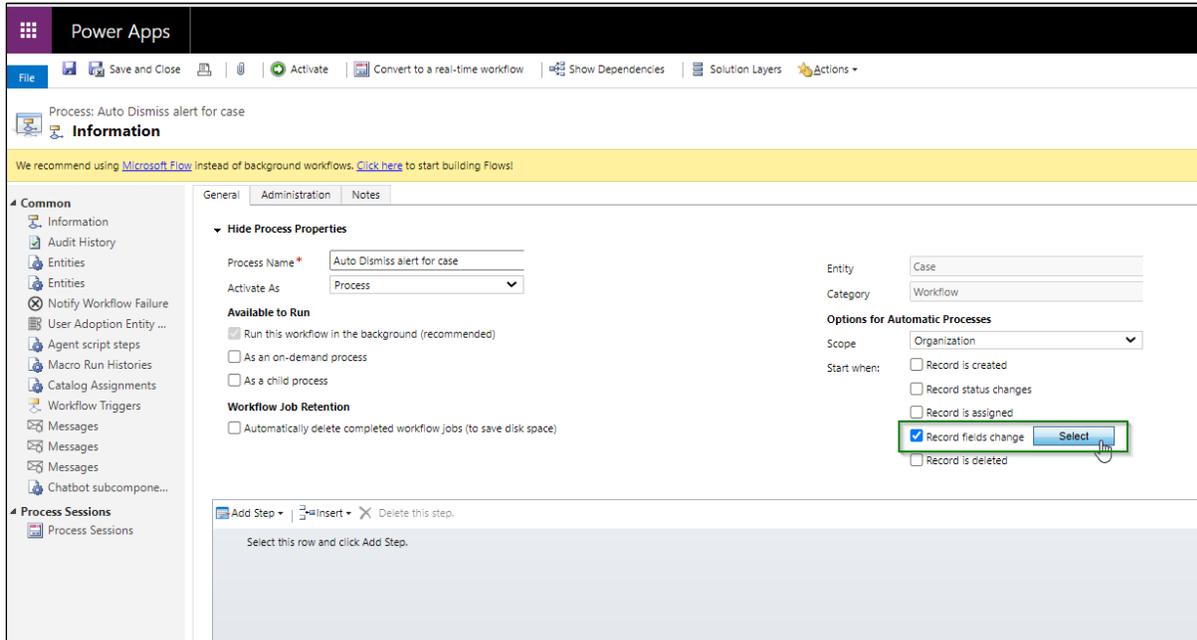


2) Select category as **'Workflow'** and choose the Entity → Click on **OK**.



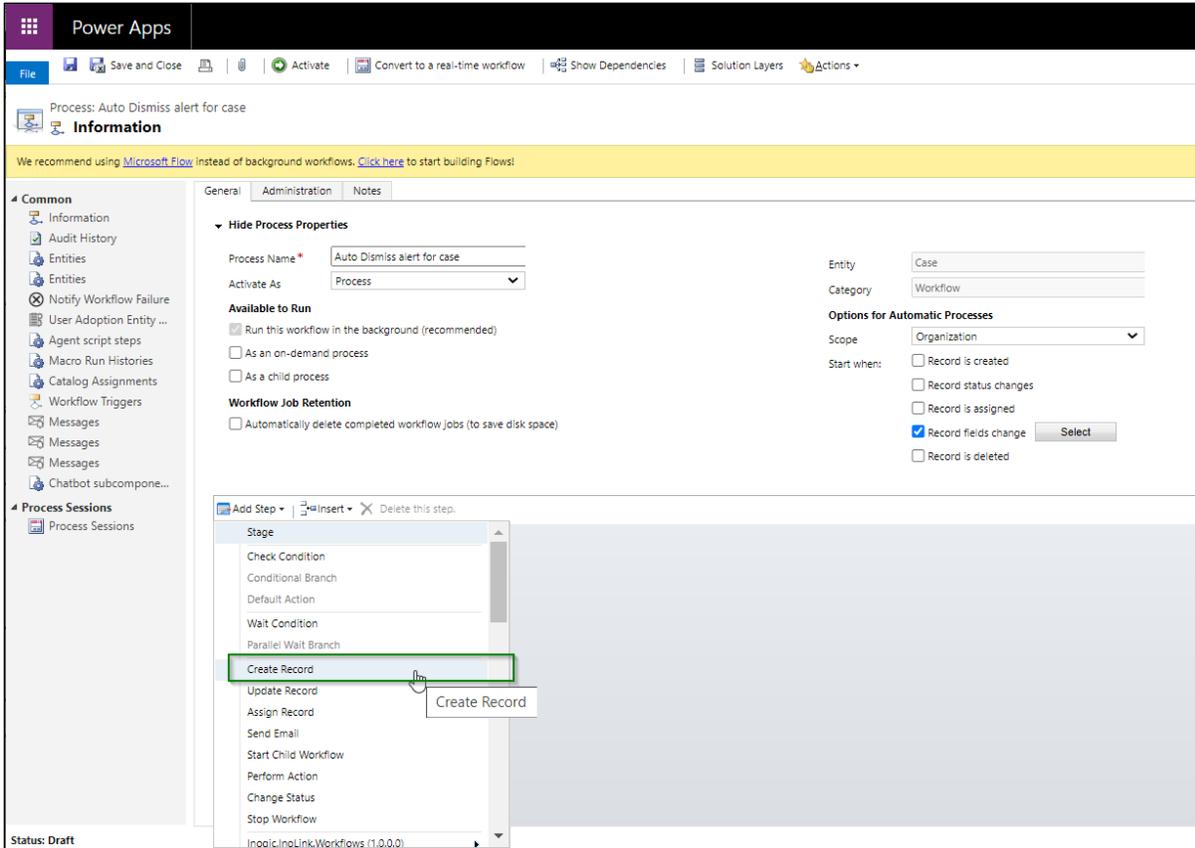
3) Go to **'Record fields change'** → Select the field **'Subject'** from the list.

Alerts4Dynamics – User Manual

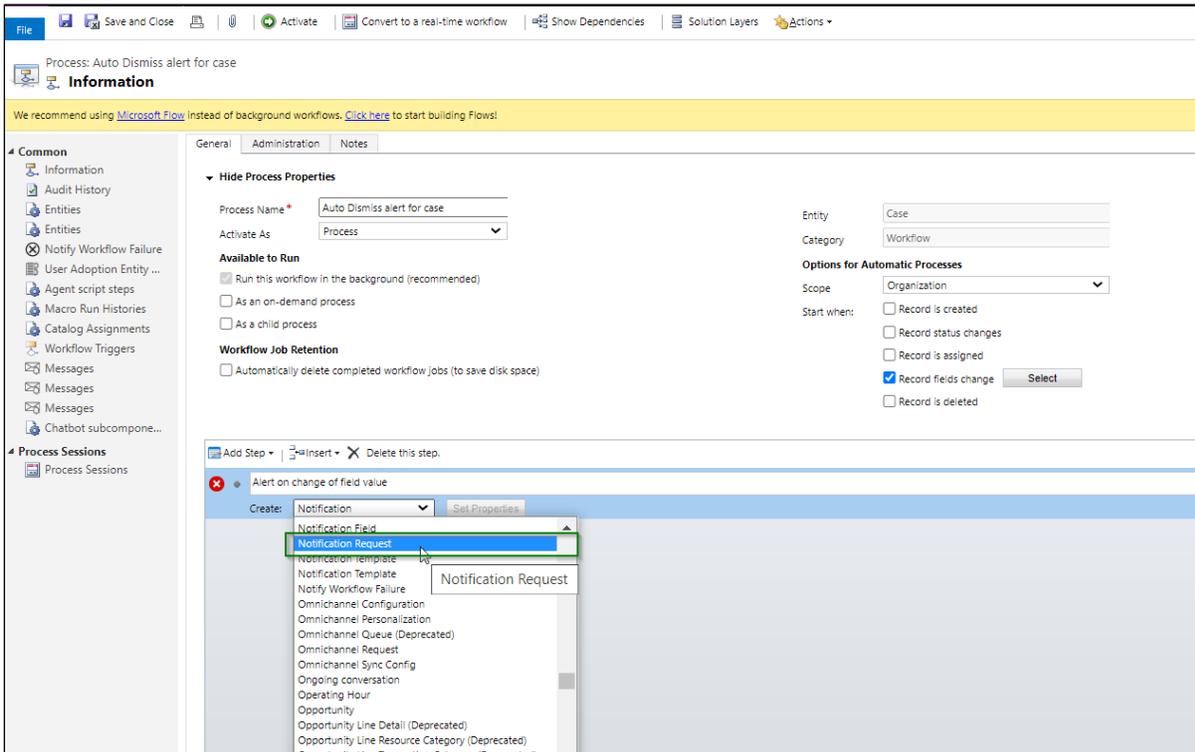


4) Create a notification request record to create an alert.

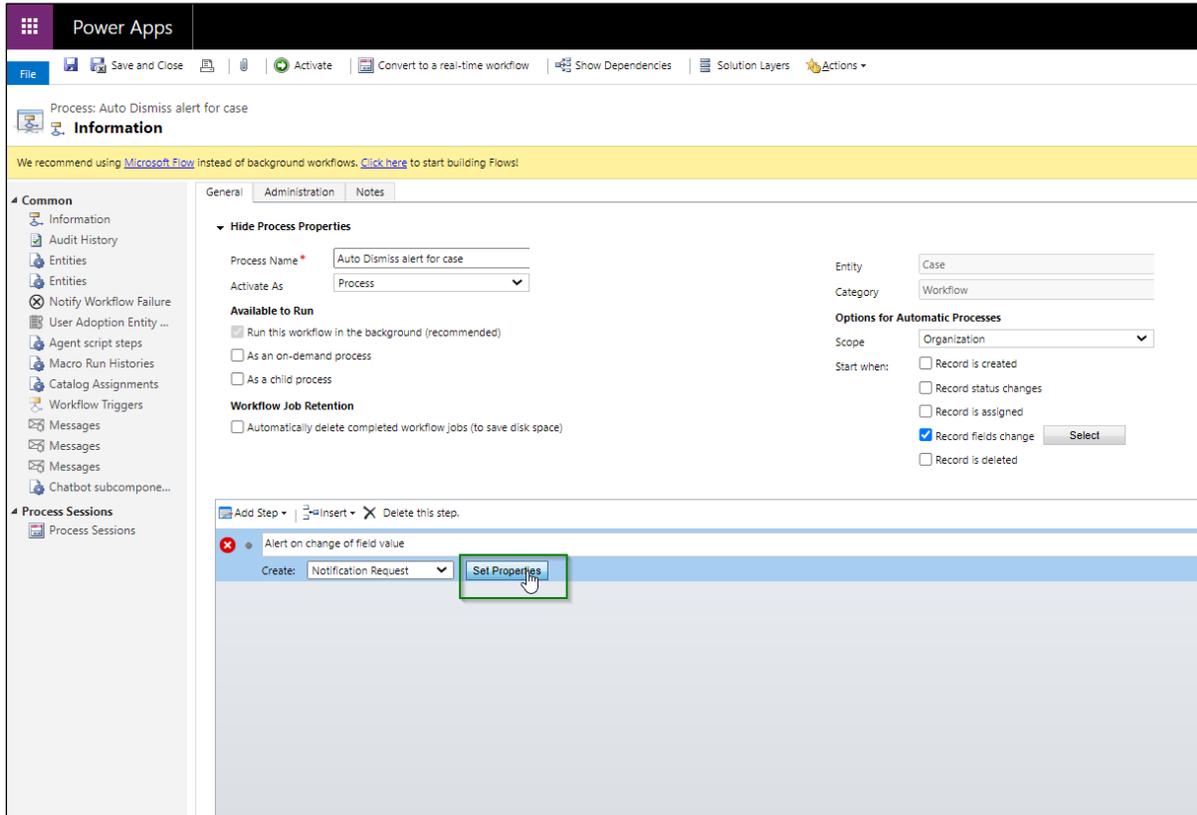
Alerts4Dynamics – User Manual



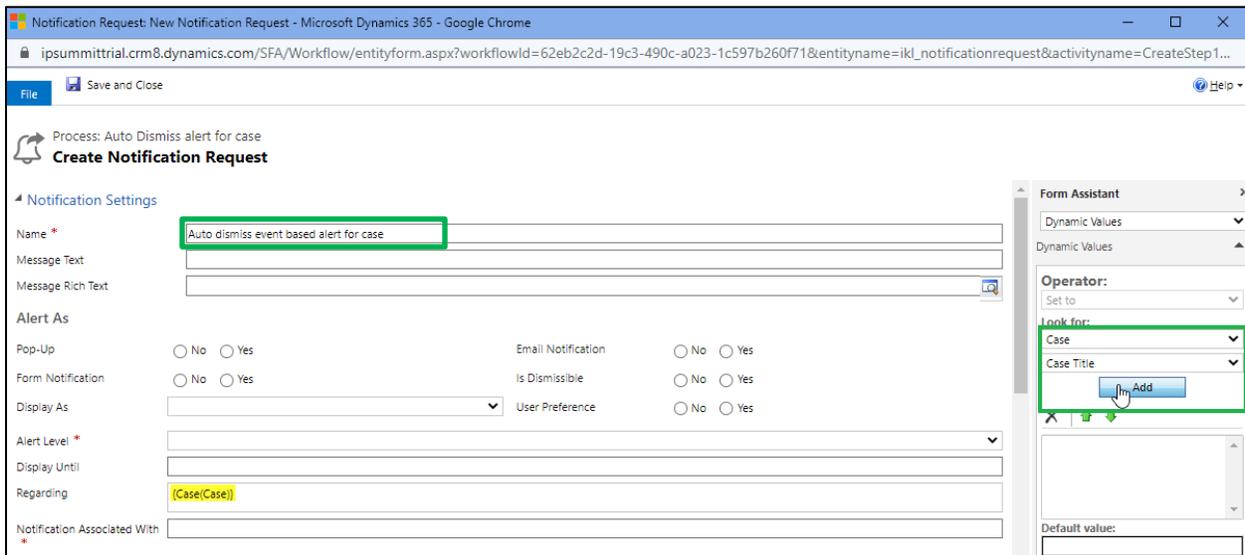
5) Select 'Notification Request'.



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:

Alerts4Dynamics – User Manual

File Save and Close Help

Process: Auto Dismiss alert for case
Create Notification Request

Notification Settings

Name * Auto dismiss event based alert for case

Message Text {Case Title(Case)} is active

Message Rich Text

Alert As

Pop-Up No Yes Email Notification No Yes

Form Notification No Yes Is Dismissible No Yes

Display As Dialog User Preference No Yes

Alert Level * Information

Display Until

Regarding {Case(Case)}

Notification Associated With *

Audience Settings

Form Assistant

Dynamic Values

Operator:

Set to

Look for: Case

Record URL(Dynamic)

Add

X | + -

Record URL(Dynamic)(Case)

Default value:

OK

File Save and Close

Process: Auto Dismiss alert for case
Create Notification Request

Notification Settings

Name * Auto dismiss event based alert for case

Message Text {Case Title(Case)} is active

Message Rich Text

Alert As

Pop-Up No Yes Email Notification No Yes

Form Notification No Yes Is Dismissible No Yes

Display As Dialog User Preference No Yes

Alert Level * Information

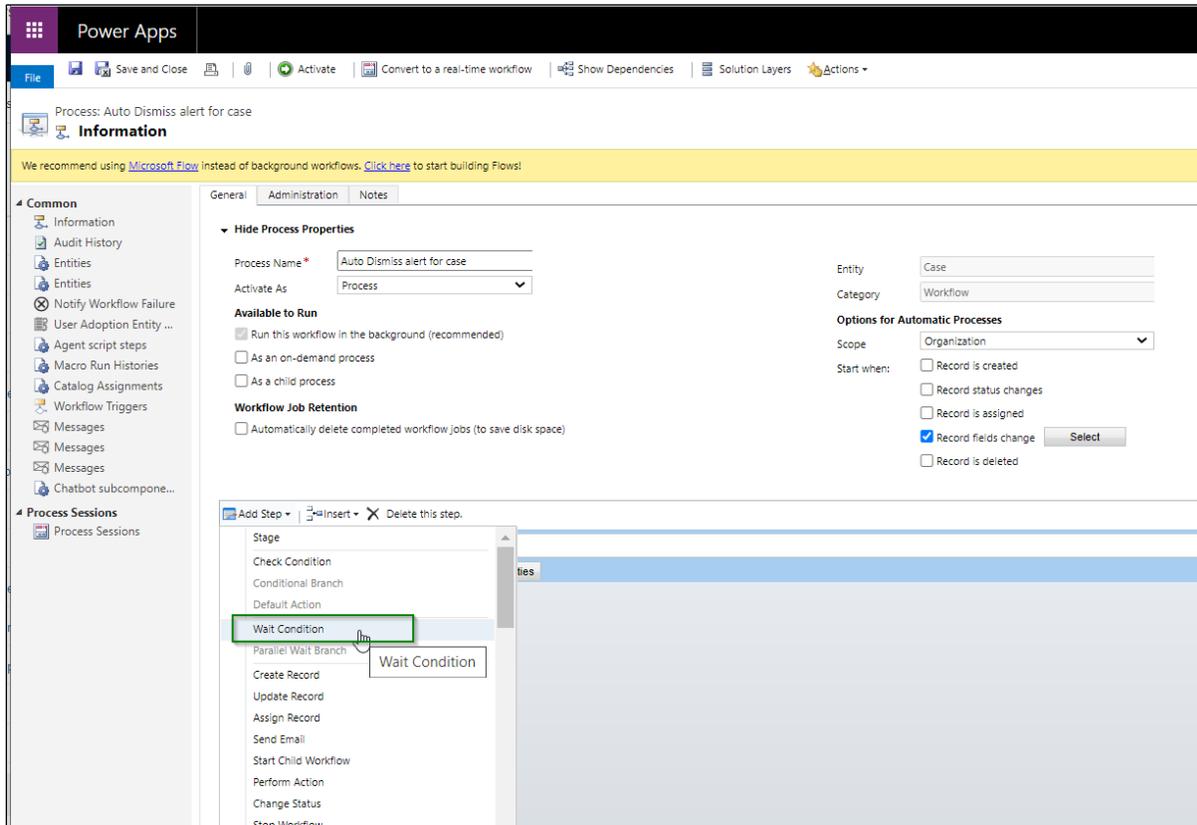
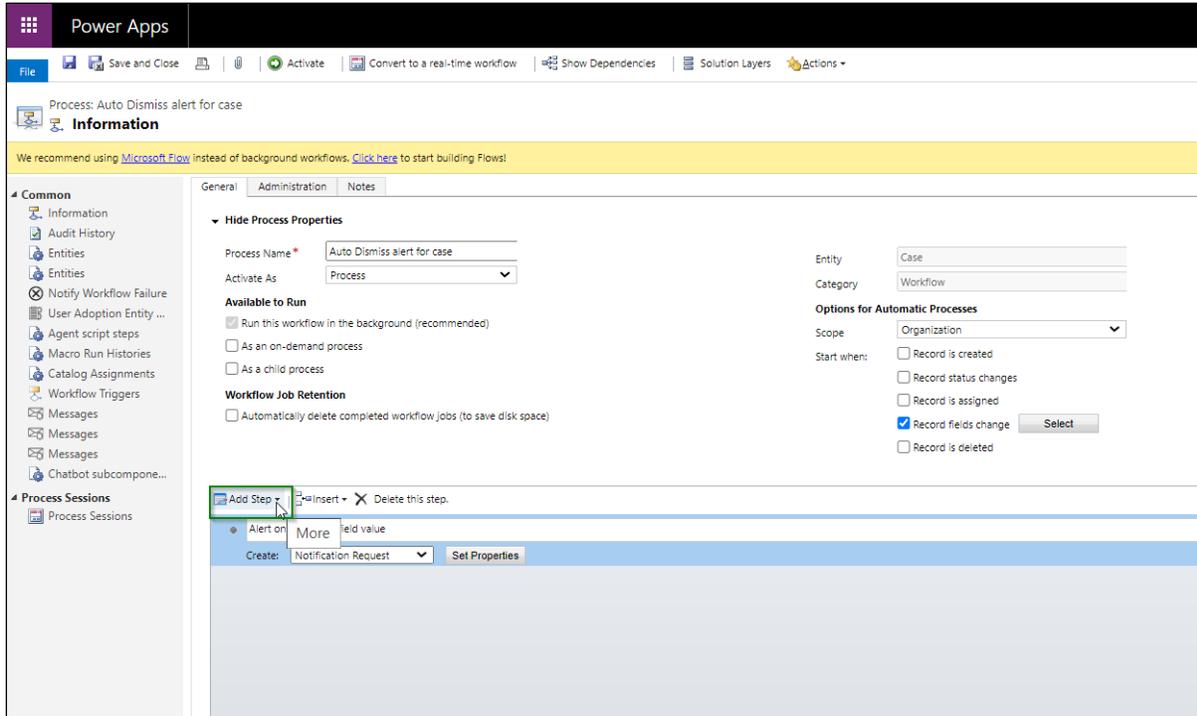
Display Until

Regarding {Case(Case)}

Notification Associated With * {Record URL(Dynamic)(Case)}

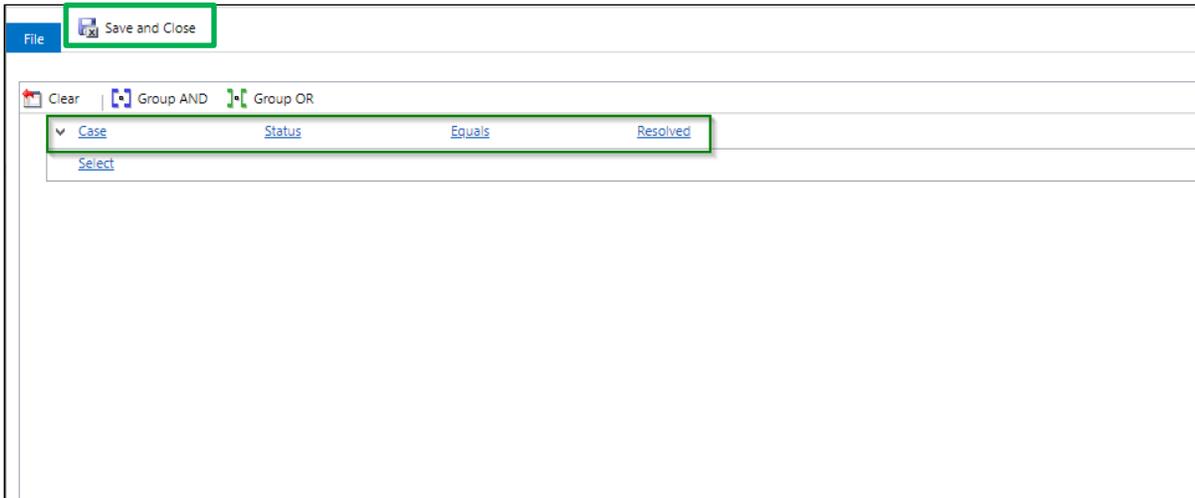
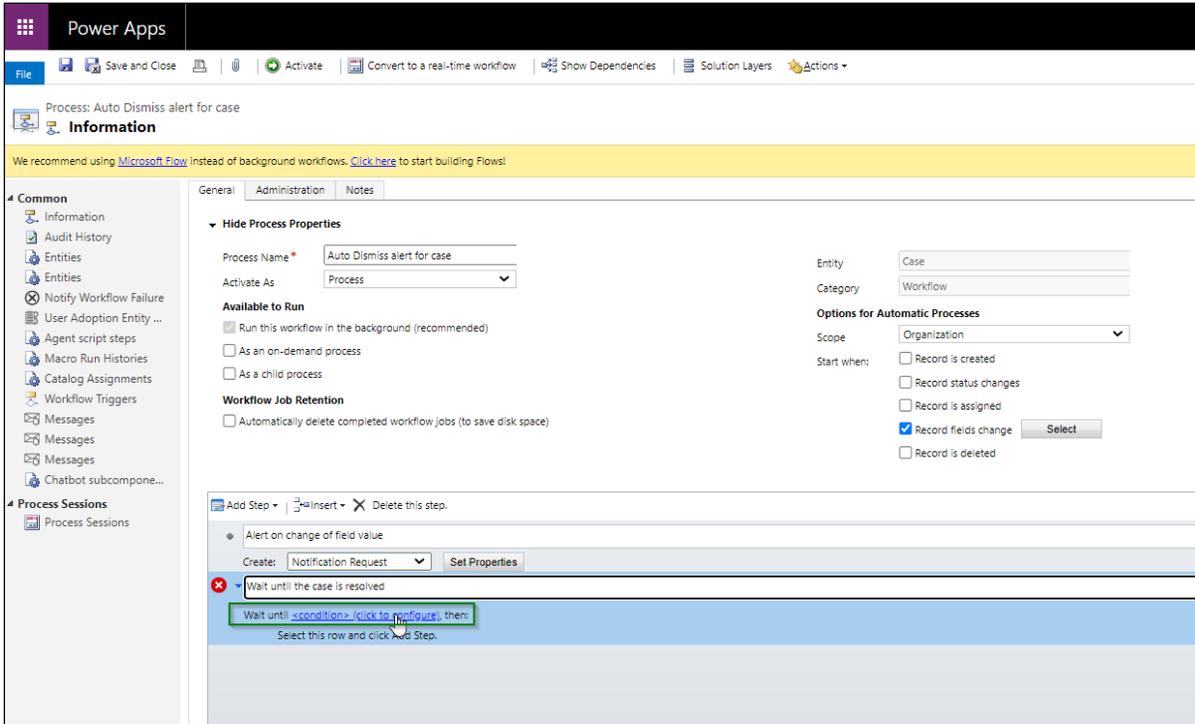
9) After creating an alert, now add a **'Wait'** condition which will wait till the case is resolved.

Alerts4Dynamics – User Manual



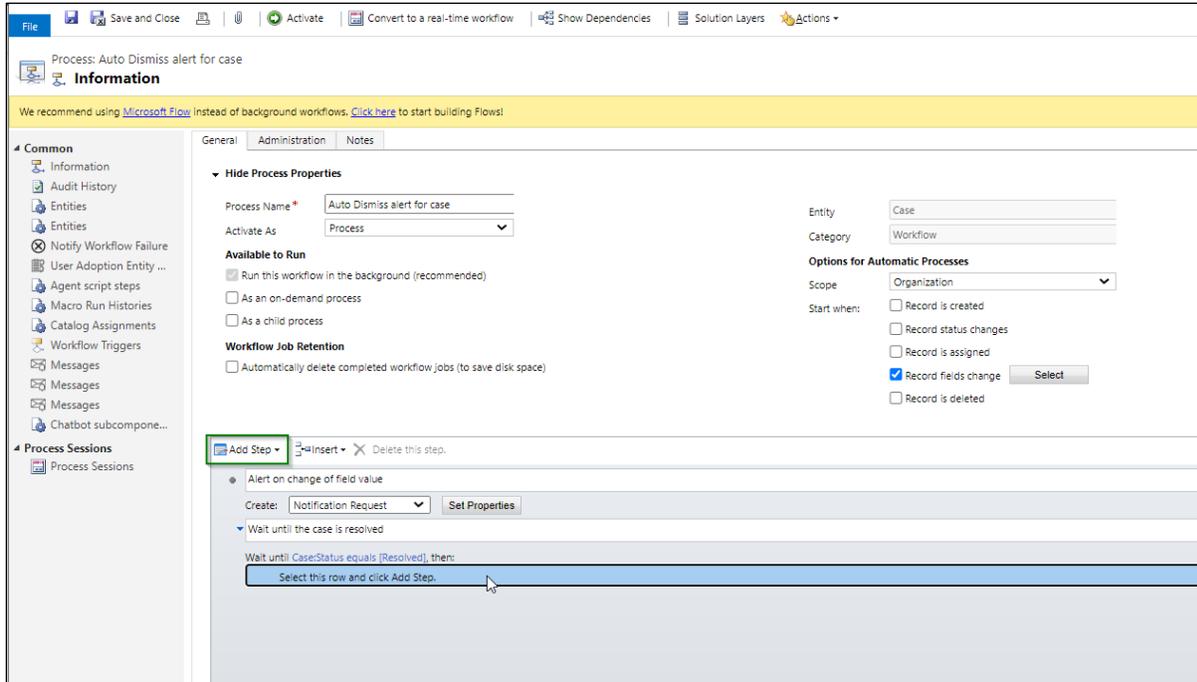
Let's further configure the condition.

Alerts4Dynamics – User Manual

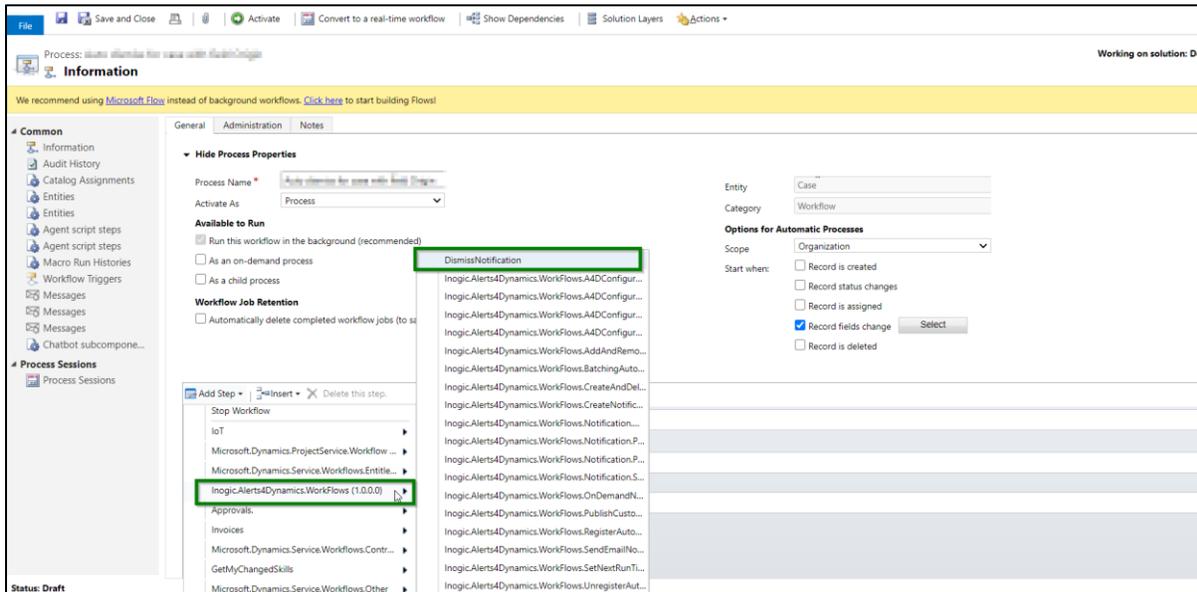


10) To auto-dismiss the alert once the case is resolved, select the row and add a new step as shown below:

Alerts4Dynamics – User Manual

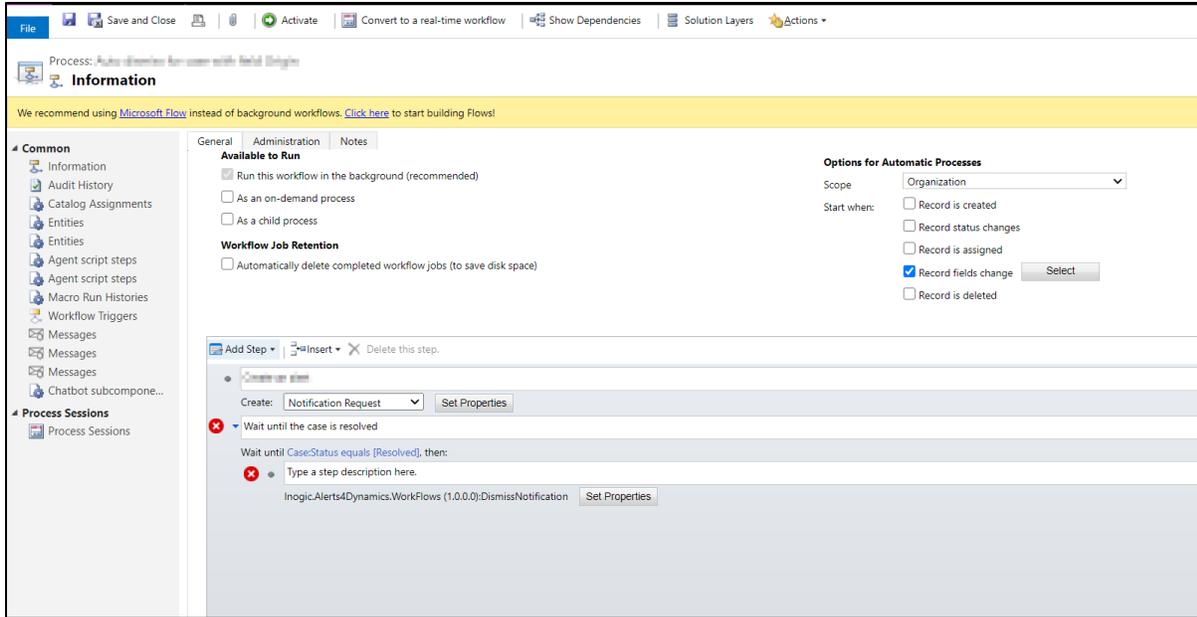


11) Select the below assembly from the list for auto dismissing the alert notification.

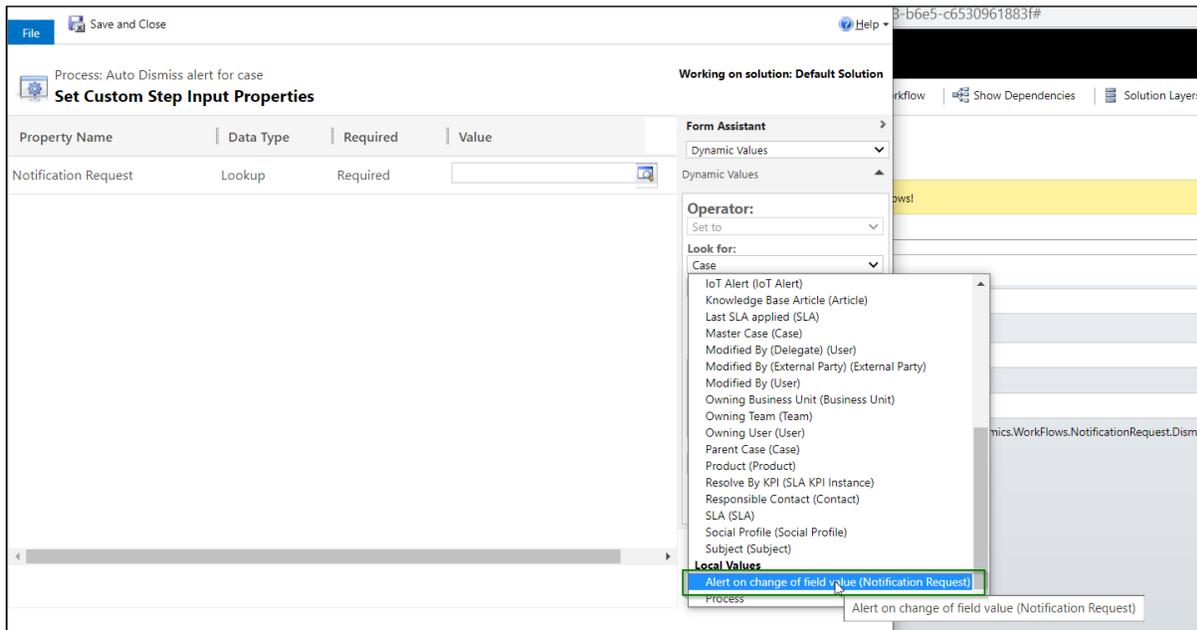


12) Click on 'Set Properties'.

Alerts4Dynamics – User Manual

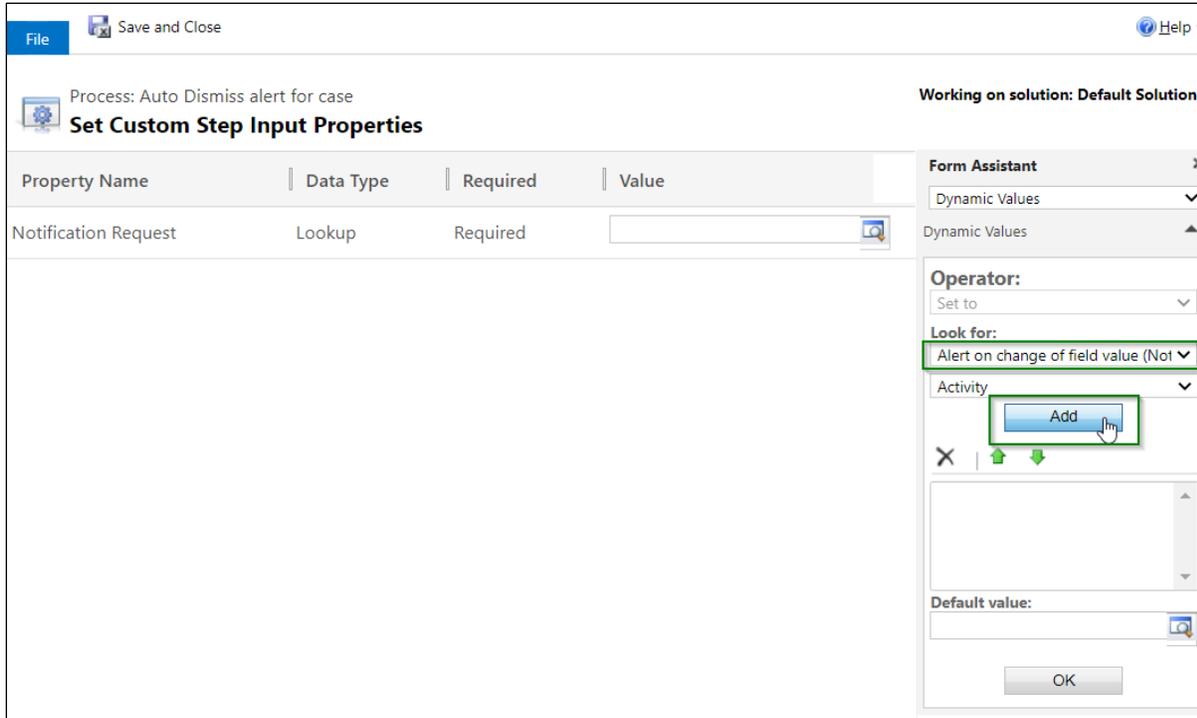


13) Select the below option from the list for 'Look for' field. This is a first step description that was added to create a notification request record.

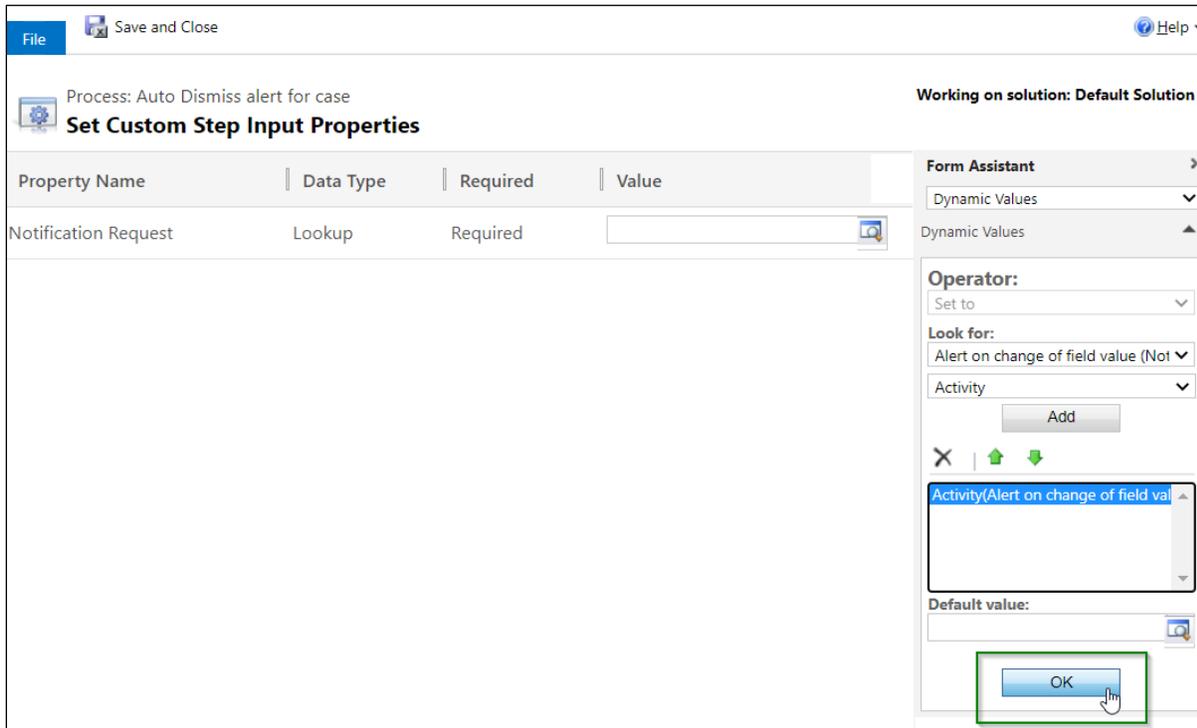


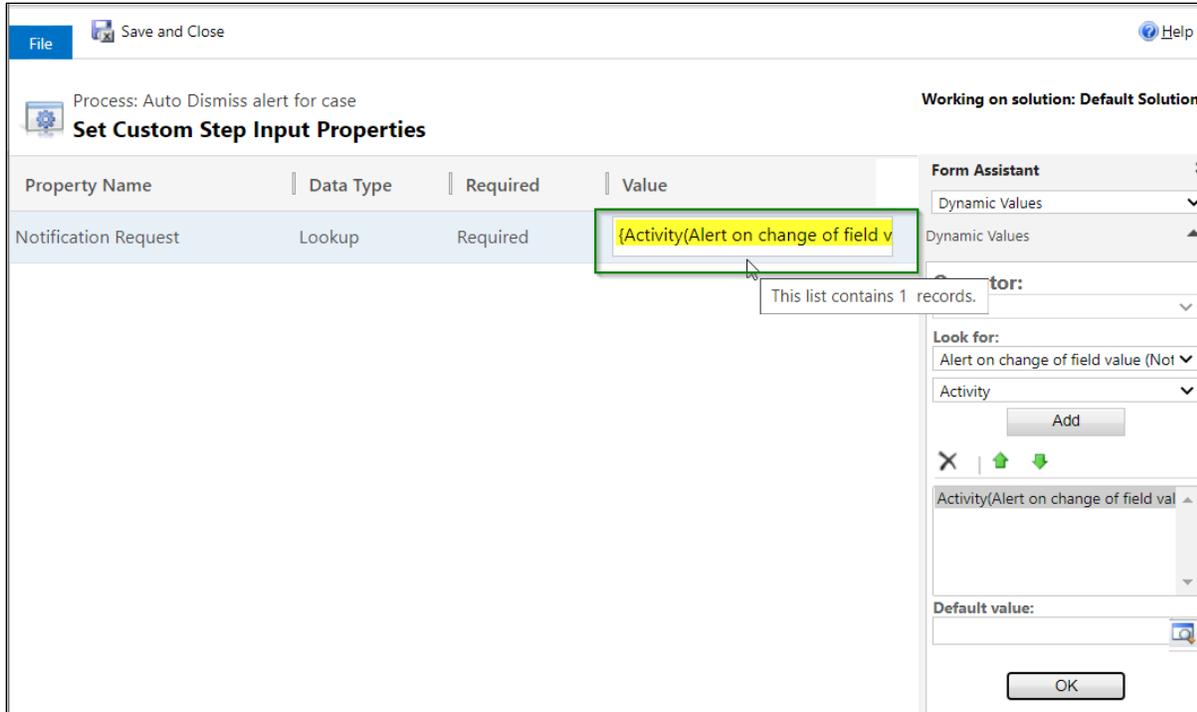
14) Click on 'Add'.

Alerts4Dynamics – User Manual

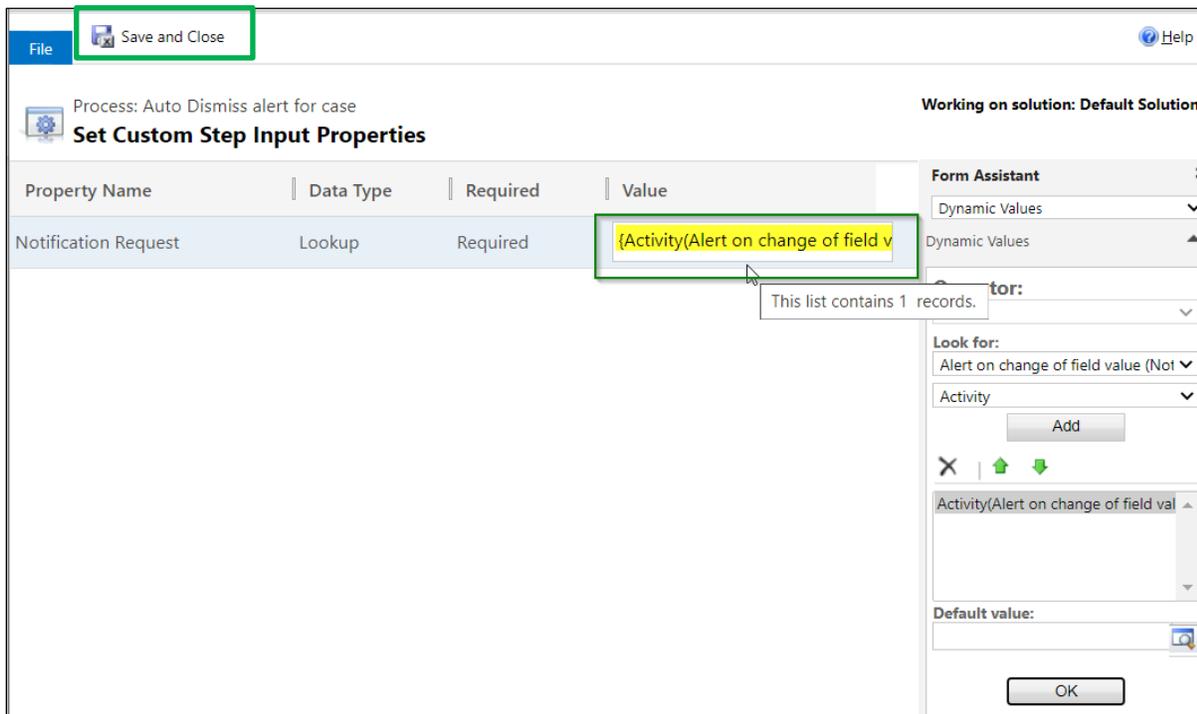


15) Click on 'OK'.



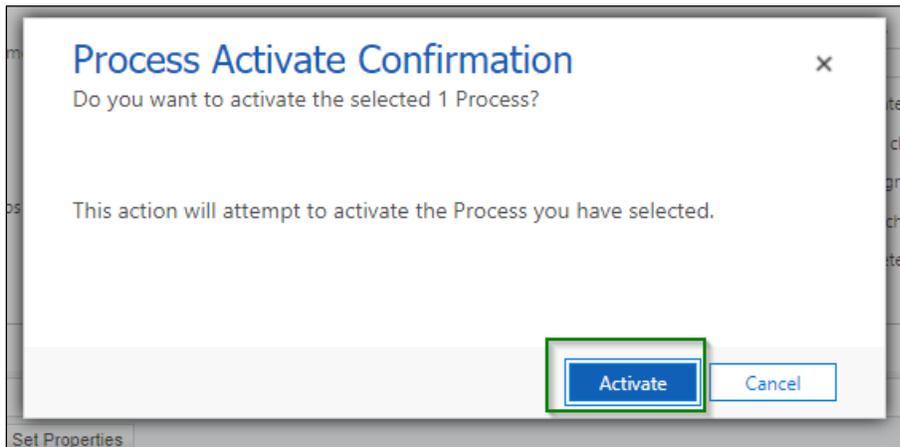
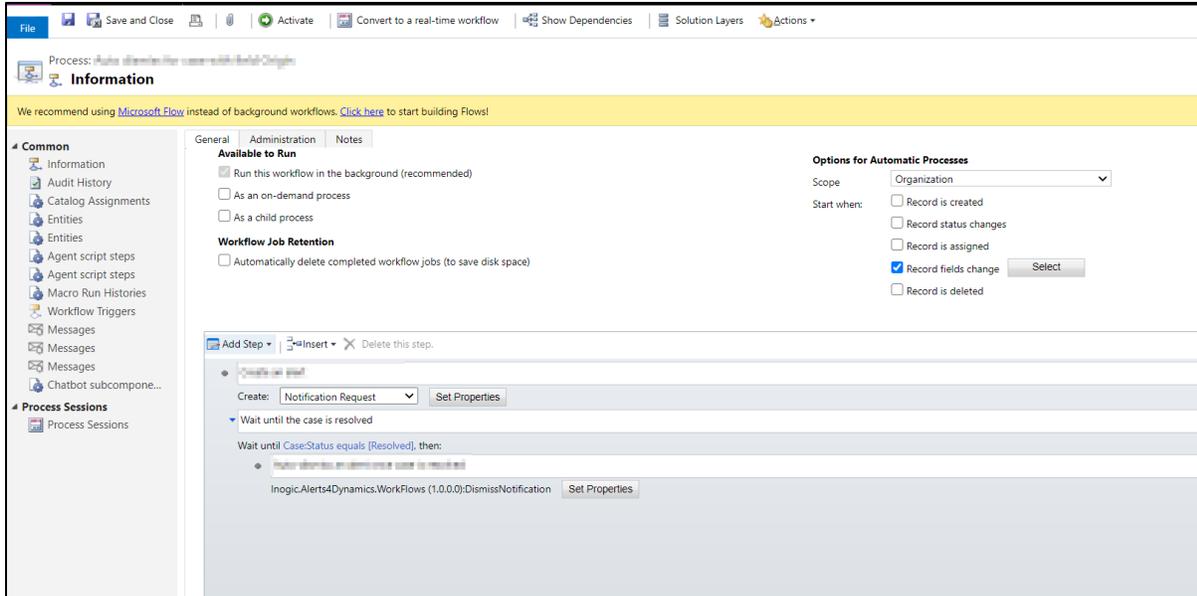


16) Click on 'Save and Close'.



17) Next, activate the workflow.

Alerts4Dynamics – User Manual



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

Sales Hub

← Show Chart + New Case Delete Refresh Run Report Email a Link Flow

Active Cases

Case Title	Case Number	Priority	Origin	Customer
Average order shipment time	CAS-01213-P8B3X0	Normal	Web	Ustream
Contact details requested	CAS-81216-456711	Normal	Email	A. Dalton
Customer Contact Information	CAS-81216-456712	Normal	Email	Blue Yonder Retail
Delivery never arrived	CAS-81216-456714	Low	Phone	Alpha 80 Retail
Exofunctional (Shawn Laptop Keyboard 1185	CAS-88855-456717	Normal	Web	Graphic Design Institut
Fetch product catalog	CAS-81222-456718	Normal	Email	North-Coffee
Incorrect product information online	CAS-81222-456719	High	Email	Ustream
Information on the product	CAS-81222-456720	Low	Email	Consolidated Mining
Item defective on delivery	CAS-88288-456721	High	Twitter	Hubbards Inc.
Maintenance information for Desktop PCs	CAS-81228-056722	Low	Email	North-Coffee

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

AO Average order shipment time
Case · Case

Phone to Case Process Active for 29 days Identify

Summary Case Relationships Associated Knowledge Records Enhanced SLA Details

Case Title	* Average order shipm...
ID	CAS-01213-P8B3X0
Subject	Delivery
Customer	Ustream
Origin	Web
Priority	Normal

Search timeline

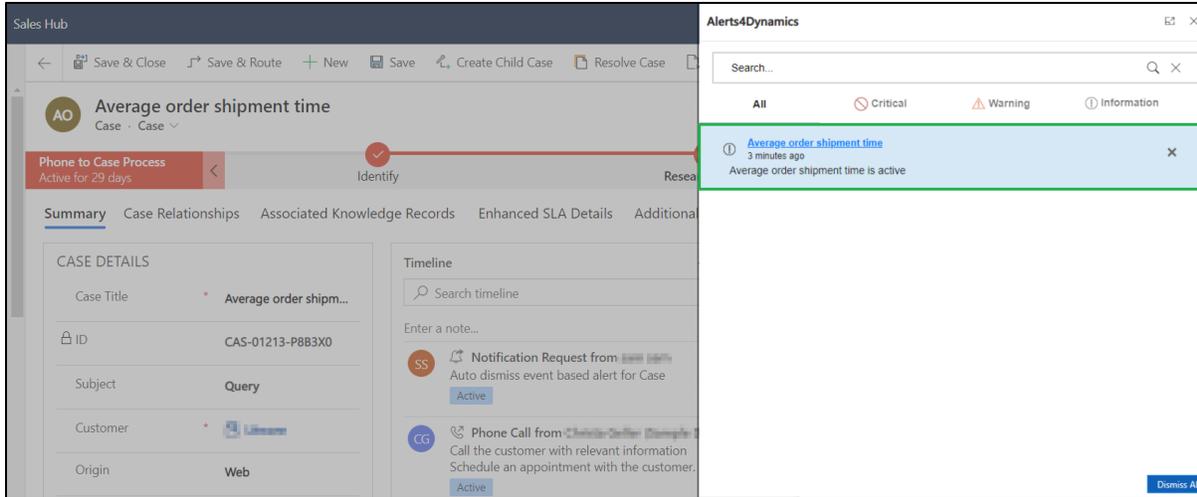
Enter a note...

- CG Phone Call from *Christa Keller*
Call the customer with relevant in
Schedule an appointment with th
Active
- Auto-post on Average order
Case: Created by *Christa Keller* (

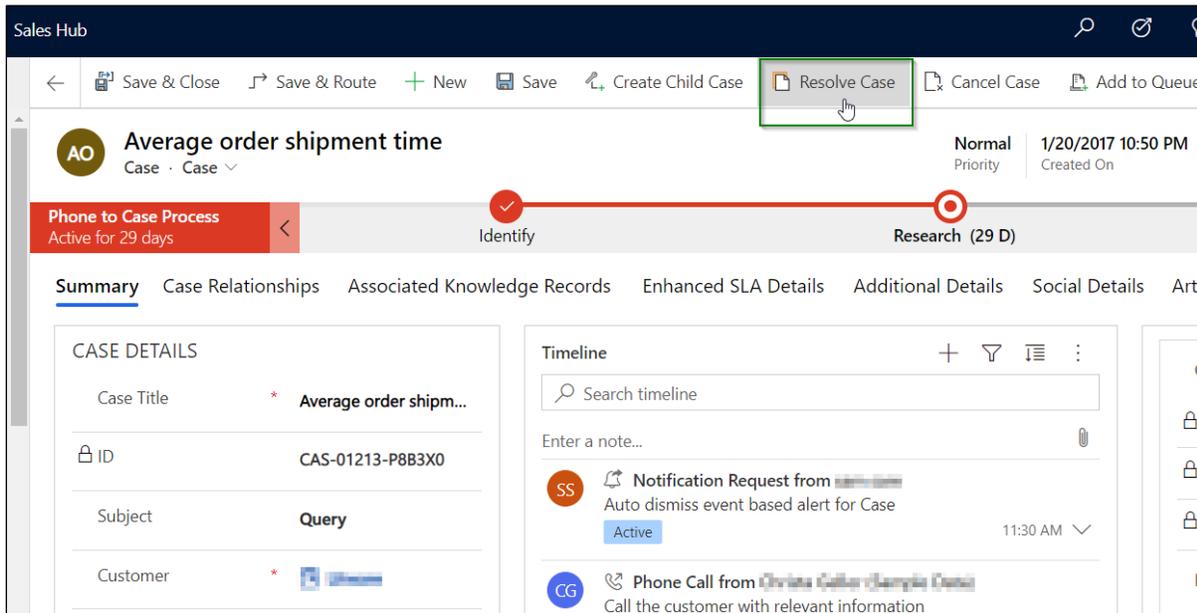
20) Click on 'Save'.

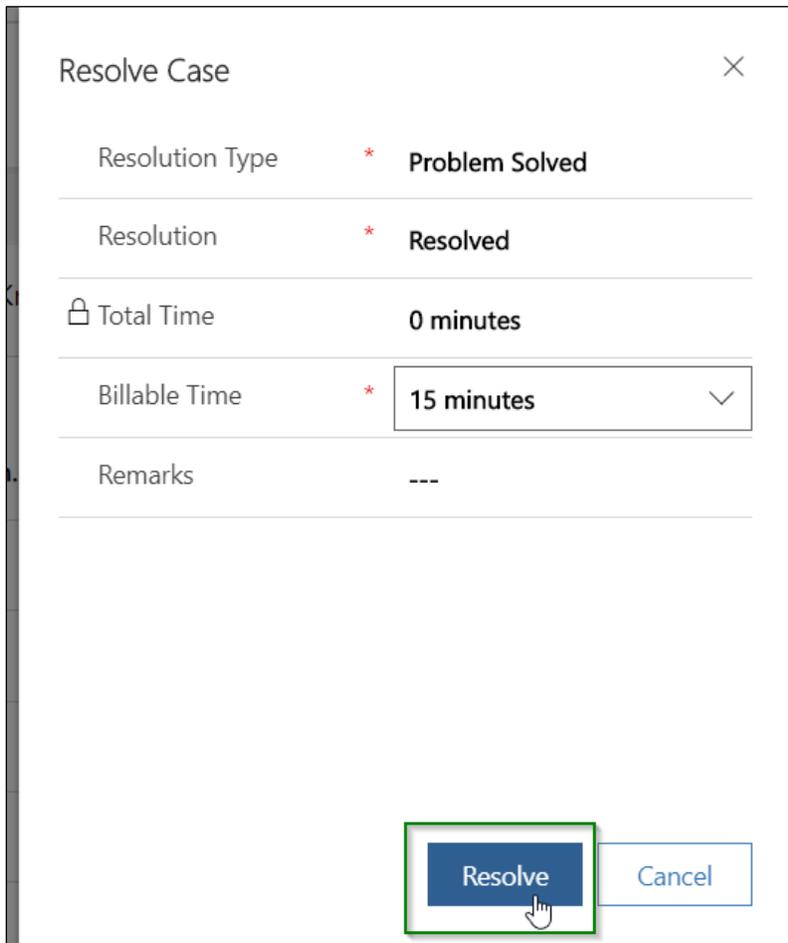
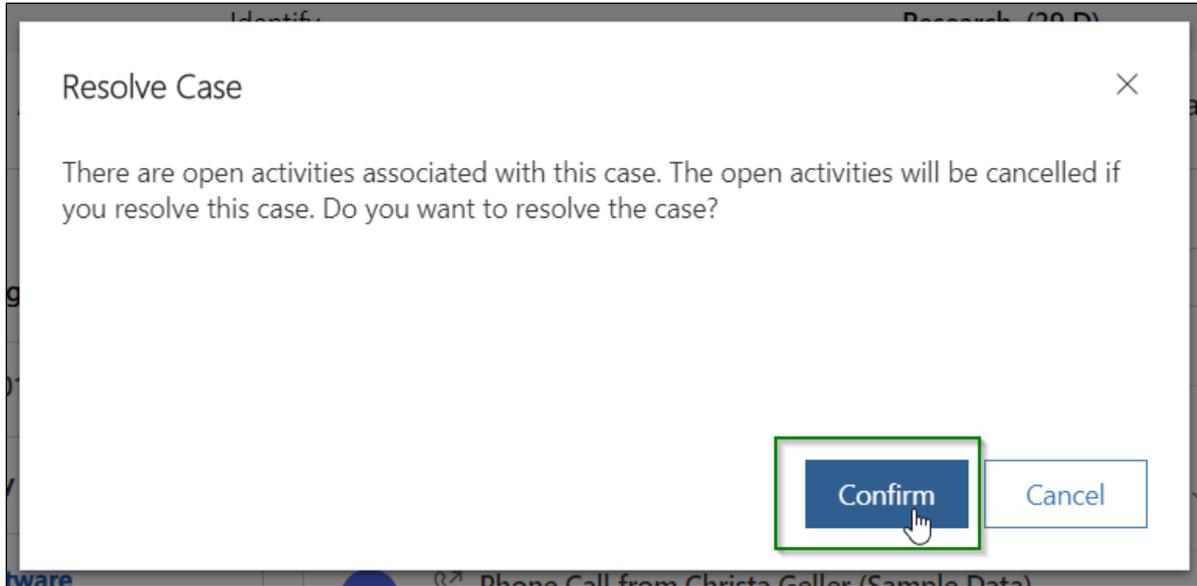
21) Once saved successfully, an alert will be shown as a **Dialog** on the case record. It will continue showing up until the case is resolved.

Alerts4Dynamics – User Manual



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





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

Alerts4Dynamics – User Manual

The screenshot shows a Dynamics CRM case record for 'Average order shipment time'. The case is in a 'Resolved' status, created on 1/20/2017 at 10:50 PM. The interface includes a 'Phone to Case Process' bar with 'Identify', 'Research (29 D)', and 'Resolve' buttons. Below this are tabs for 'Summary', 'Case Relationships', 'Associated Knowledge Records', 'Enhanced SLA Details', 'Additional Details', 'Social Details', 'Articles and Contract Information', 'Field Service', and 'Related'. The 'CASE DETAILS' section shows the case title, ID (CAS-01213-PBB3X0), subject (Query), customer (Litware), origin (Web), priority (Normal), and contact. The 'Timeline' section shows a sequence of events: 'Auto-post on Average order shipment time' (11:38 AM), 'Case Closed by [user] for Account [Account ID]' (11:38 AM), 'Resolved by [user]' (11:38 AM), 'Phone Call from [user]' (11:38 AM), and 'Notification Request from [user]' (11:38 AM). The 'CUSTOMER DETAILS' section shows contact information for Litware, and the 'RECENT CASES' section is empty.

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:

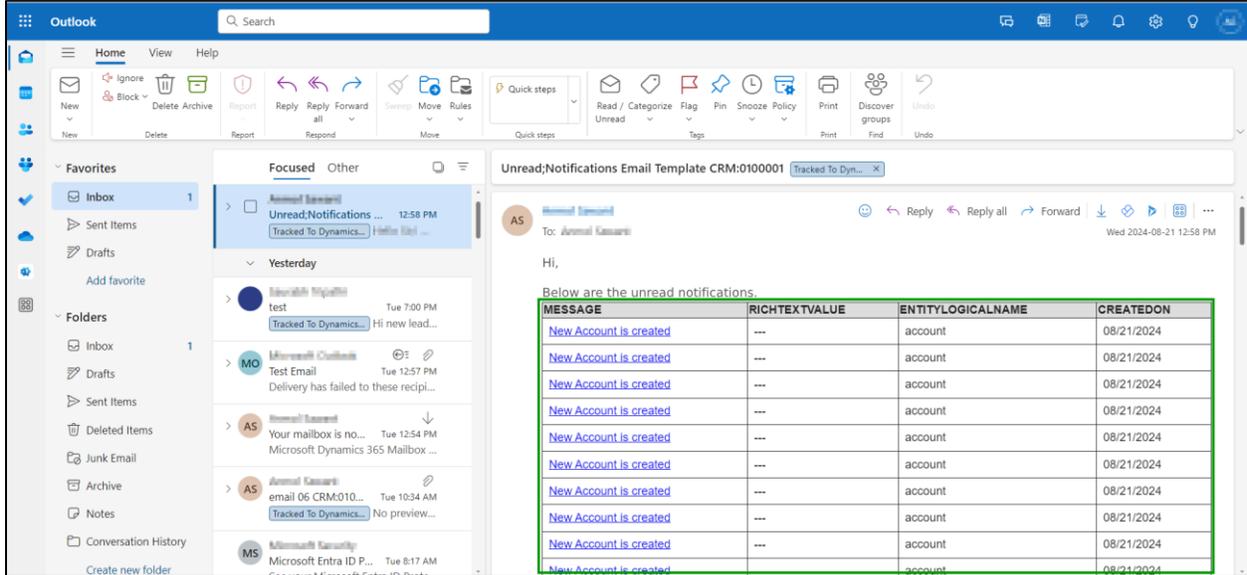
- To view the Unread Notifications in Outlook, go to your **Outlook account -> Inbox -> Click on Mail.**

The screenshot shows an Outlook inbox with several unread notifications. The 'Focused' tab is selected, and the 'Inbox' folder is active. The notifications are as follows:

- Unread:Notifications ... 12:58 PM (Tracked To Dynamics...)
- test 7:00 PM (Tracked To Dynamics...)
- Test Email 12:57 PM (Delivery has failed to these recipients...)
- Your mailbox is no... 12:54 PM (Microsoft Dynamics 365 Mailbox ...)
- email 06 CRM:010... 10:34 AM (No preview...)
- Microsoft Security 8:17 AM (Microsoft Entra ID P...)

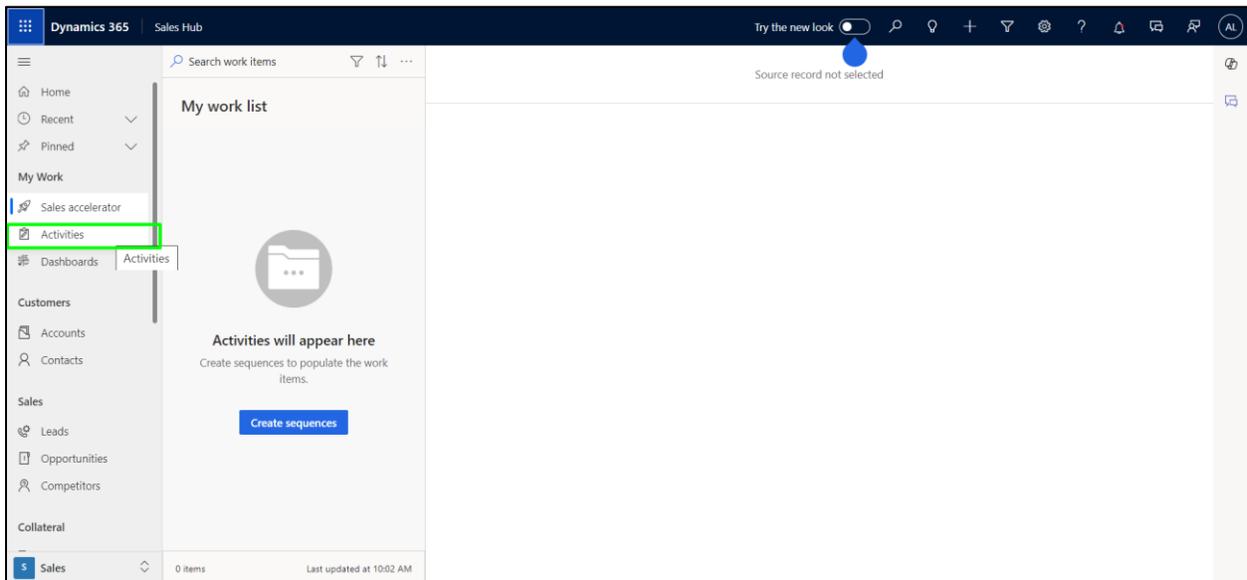
Alerts4Dynamics – User Manual

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



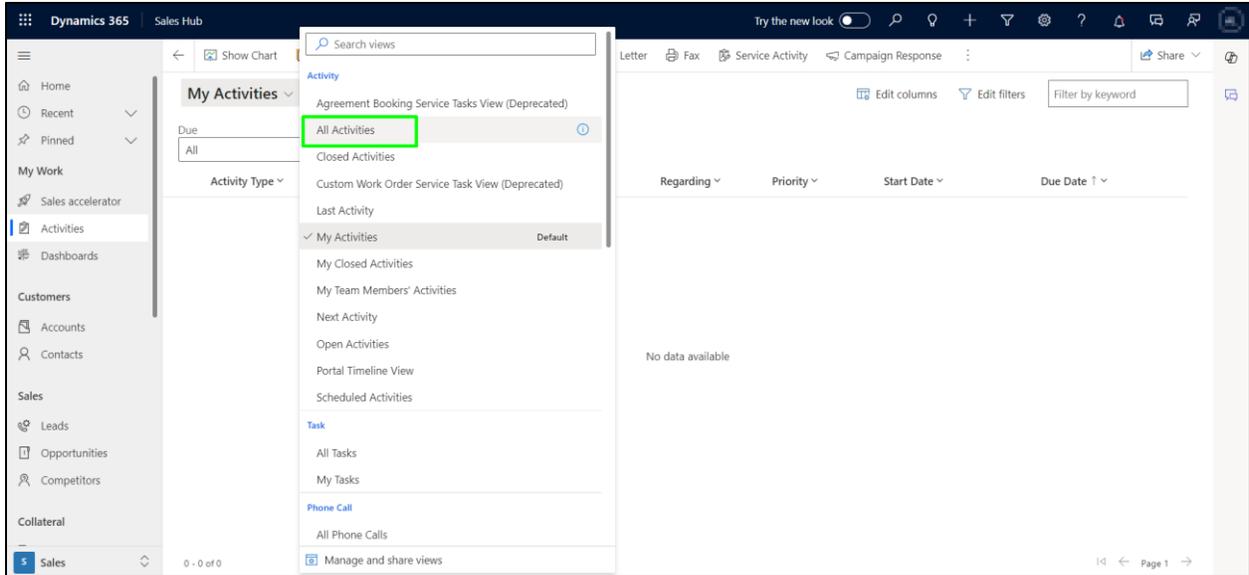
CRM:

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

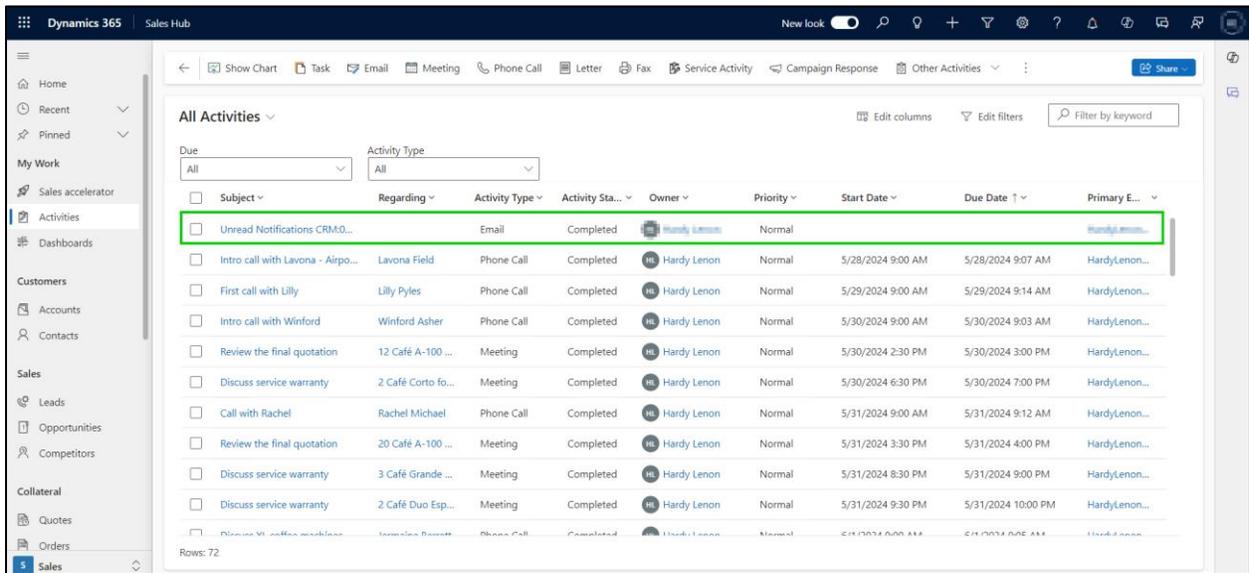


- Go to **“All Activities”**.

Alerts4Dynamics – User Manual

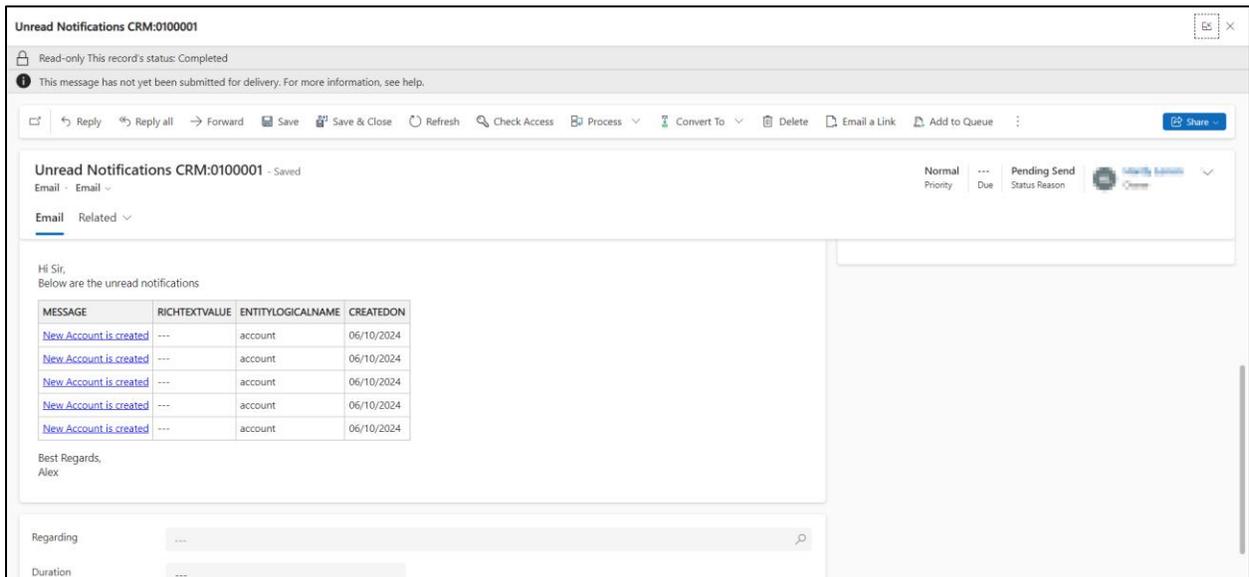
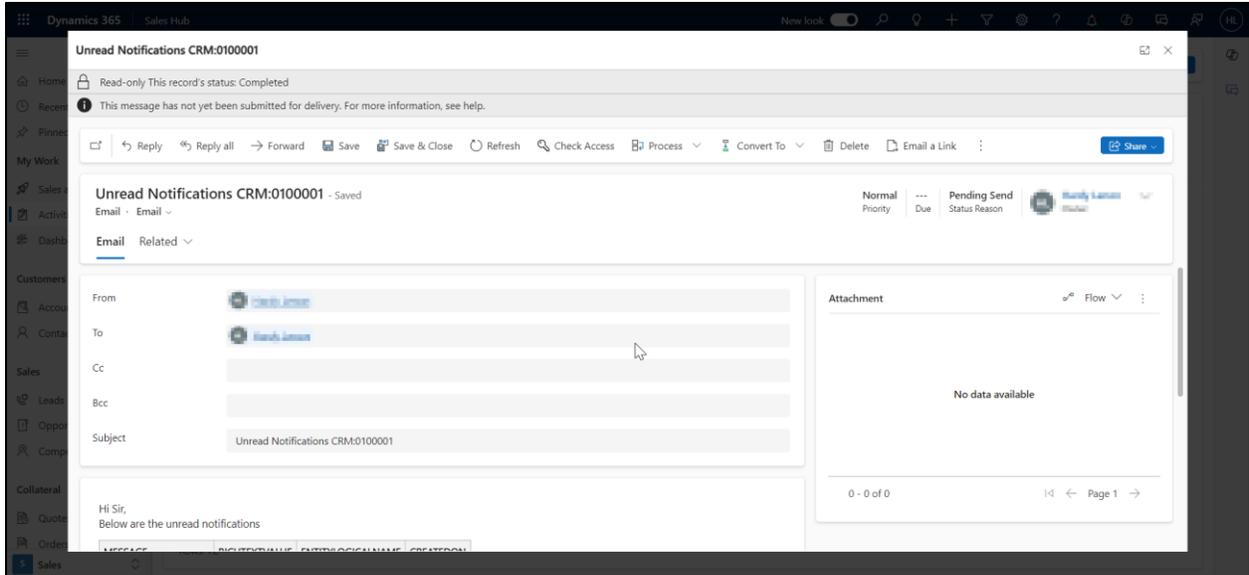


- Click on the suitable “Email Activity Record.”



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

Alerts4Dynamics – User Manual



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.

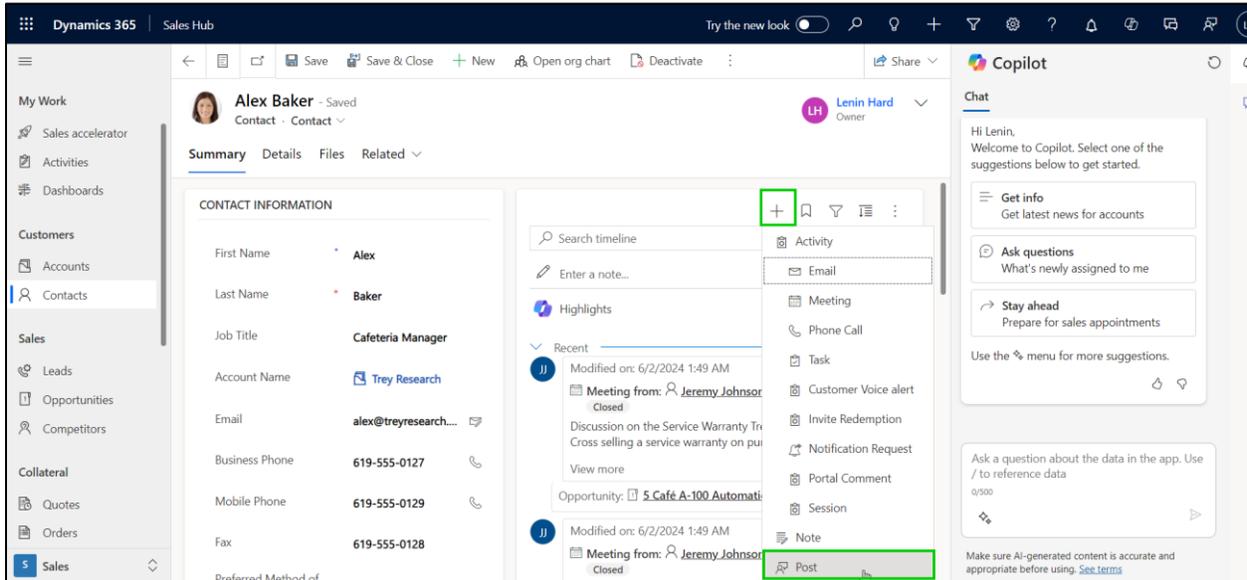
Here's how **Post Notification** feature works:

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

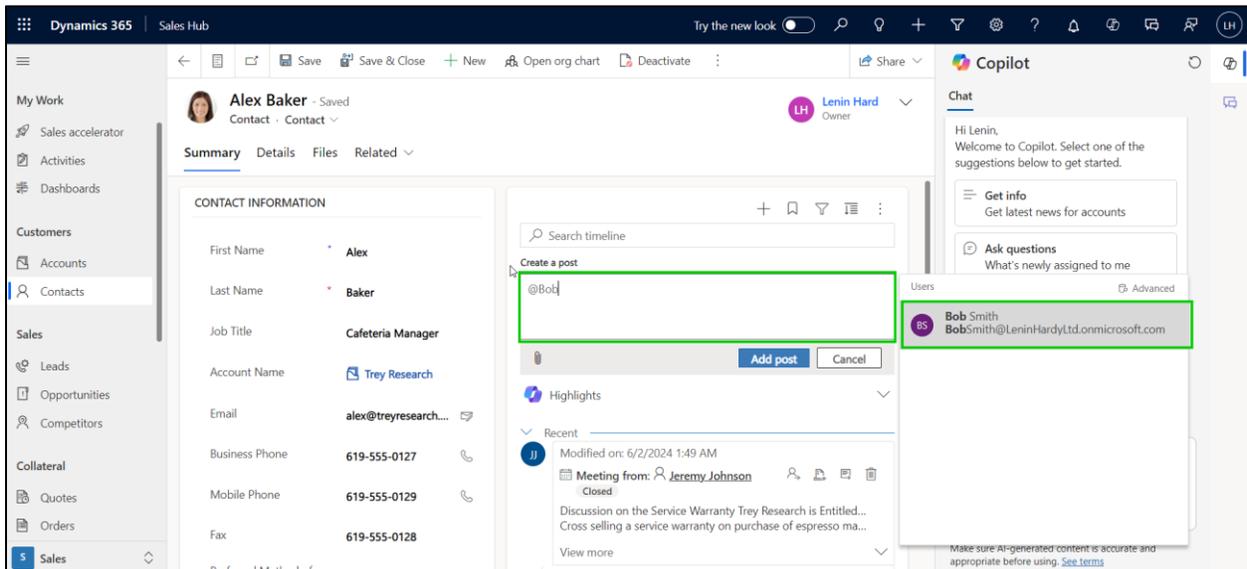
Alerts4Dynamics – User Manual

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’.

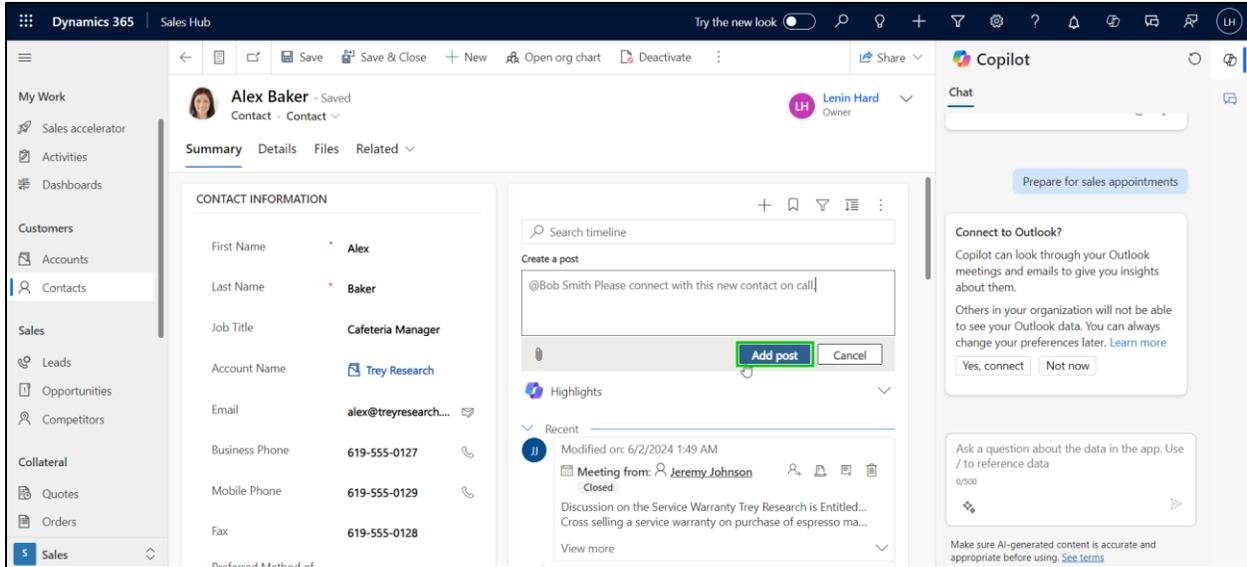


- Tag the user you want to deliver the custom post message to.

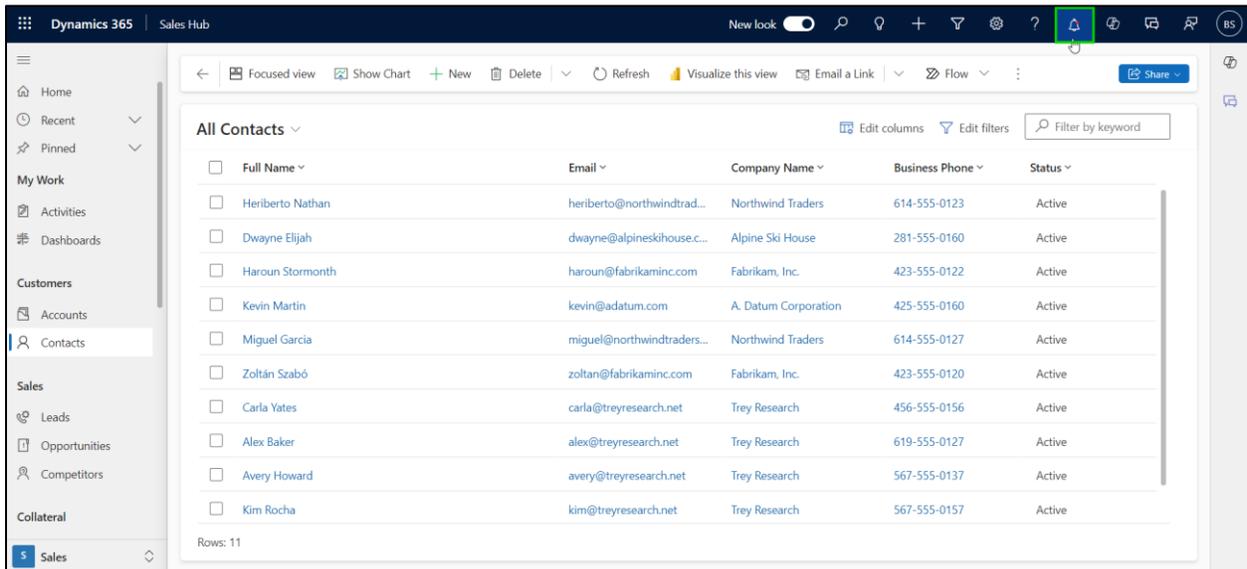


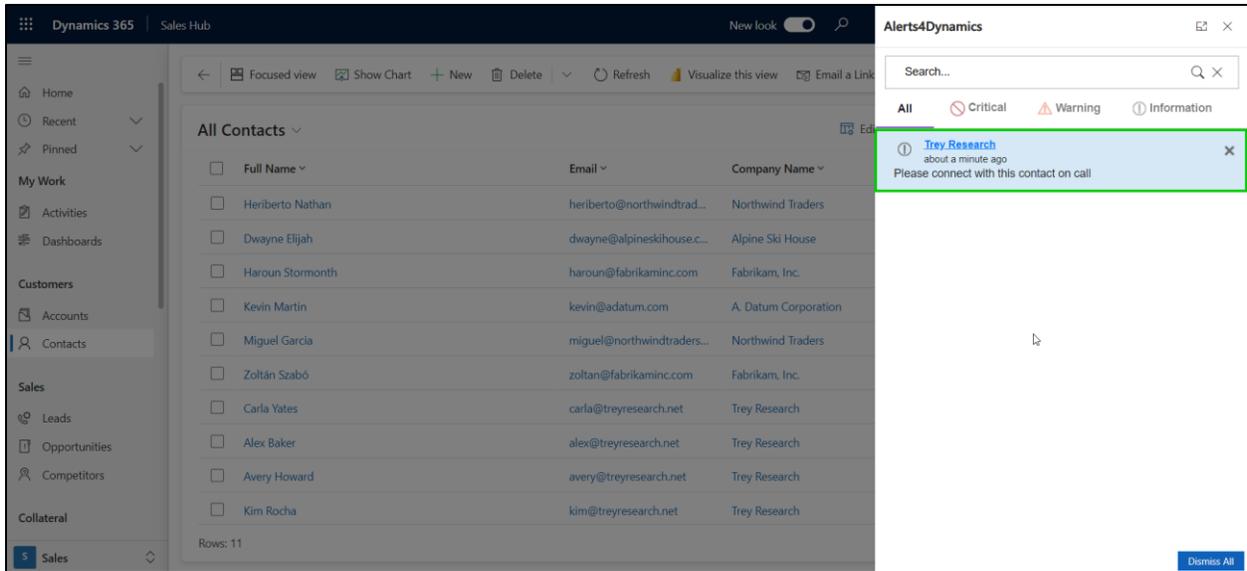
- Type the message and click ‘Add Post’ to deliver the message as a notification to your desired user.

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

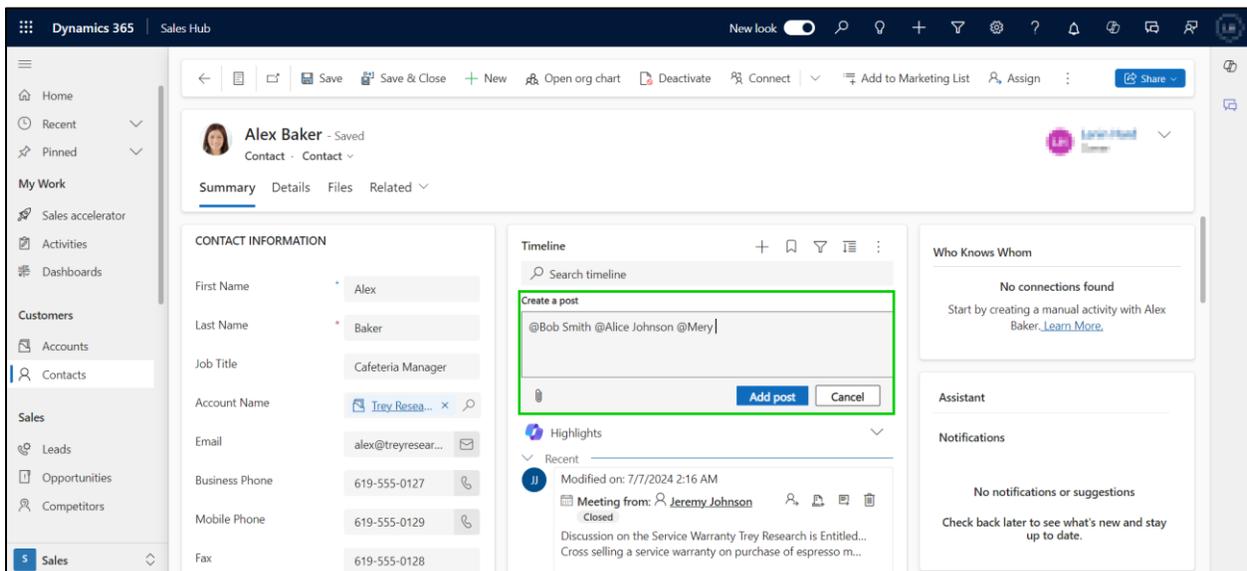




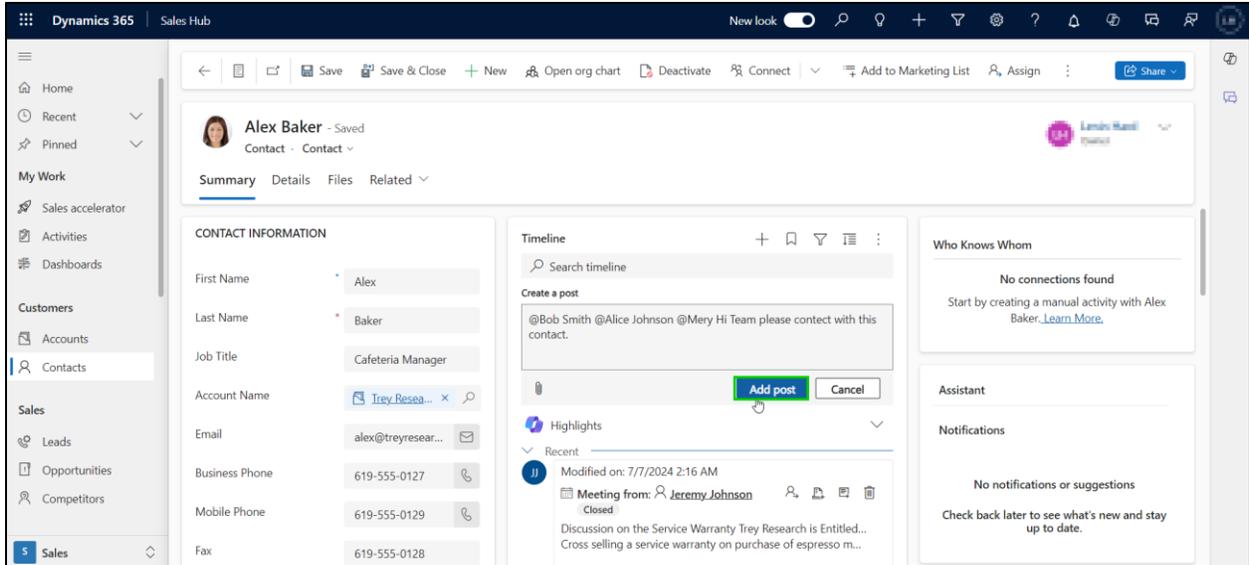
Example 2: Multiple users are tagged with a custom post message.

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.

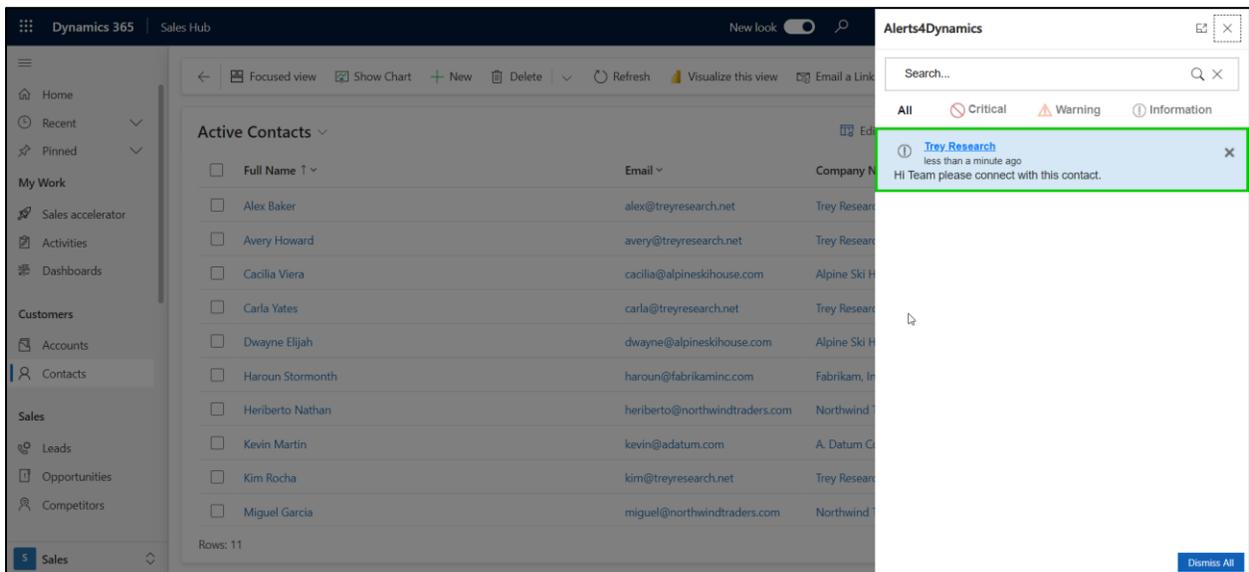
- Tag the users you want to deliver the custom post message to.



- 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.

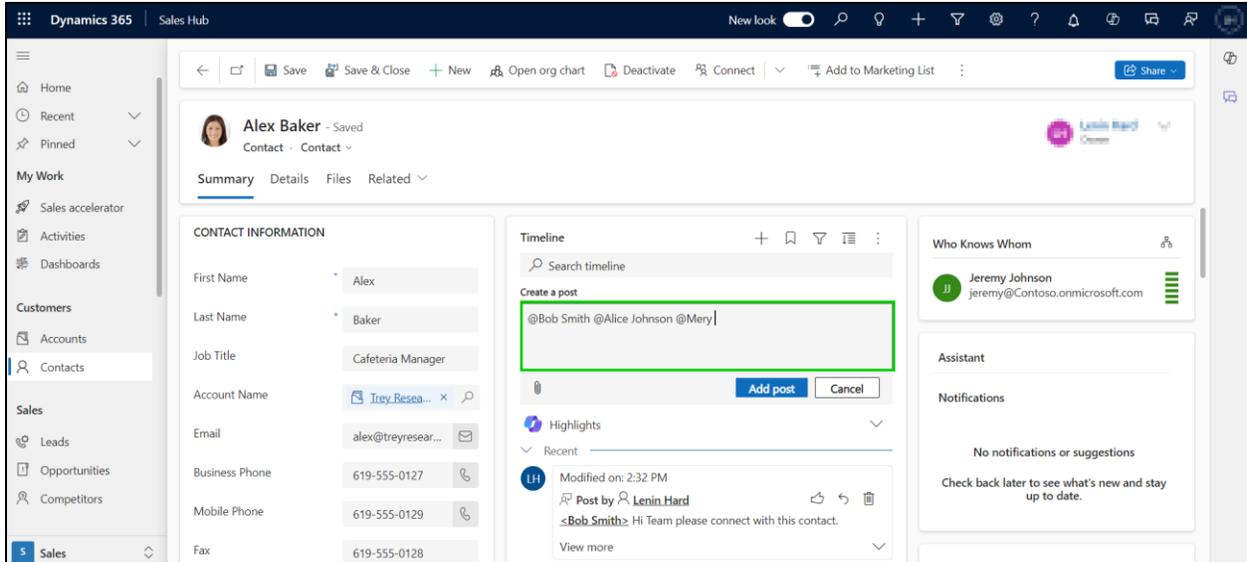


Example 3: Multiple users are tagged without a custom post message.

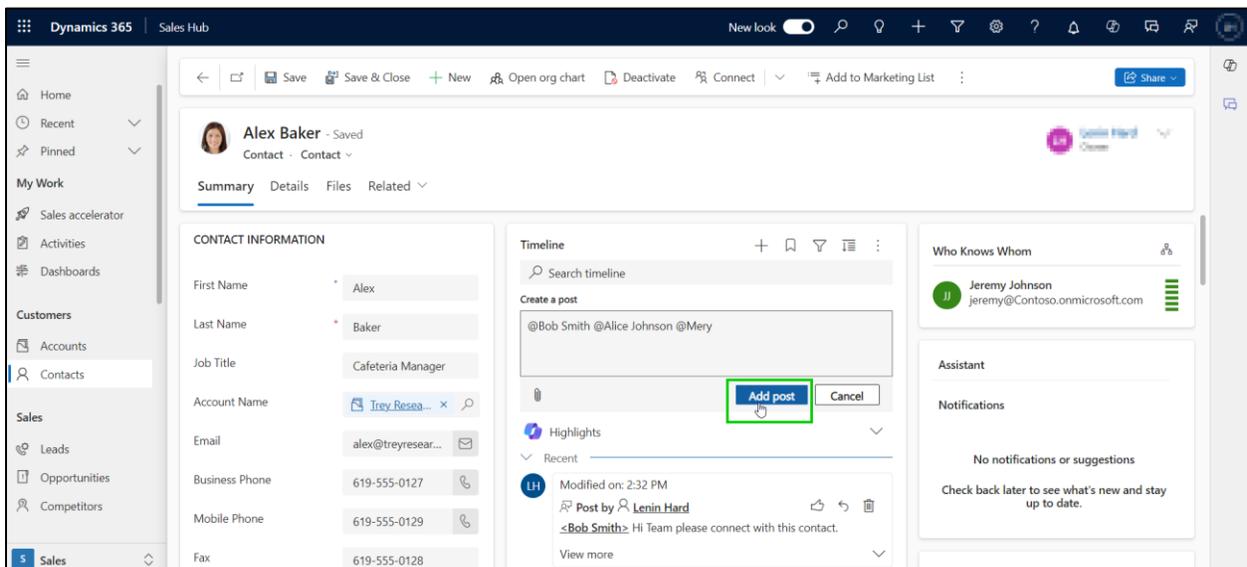
For example, Lenin, a sales manager, wants to send a reminder invitation message for the weekly sales meeting every Wednesday at 4 pm without typing the message each time. With the post notification feature, he can set up a message in the workflow. He can then send this reminder to one or multiple users 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.

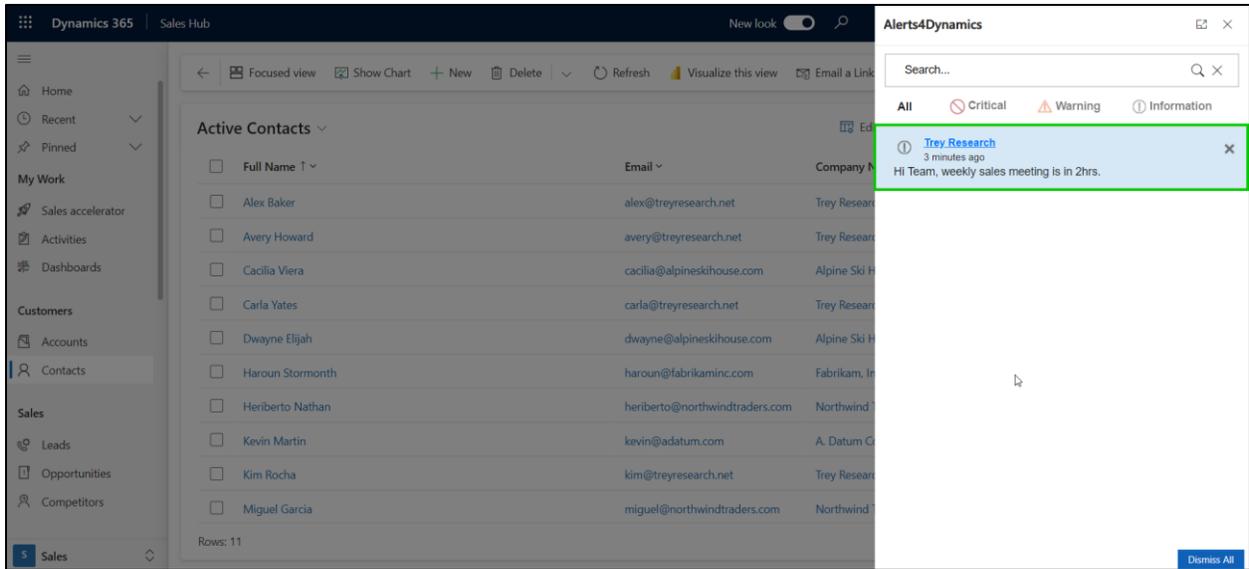
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- Now click 'Add Post' to deliver the message text from the workflow as a notification to your desired users.



- 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.



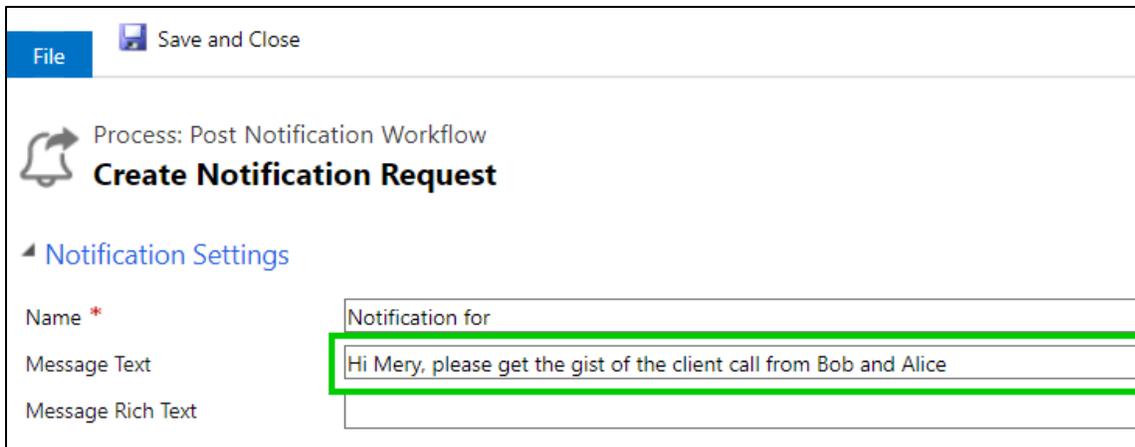
Note:

- *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.

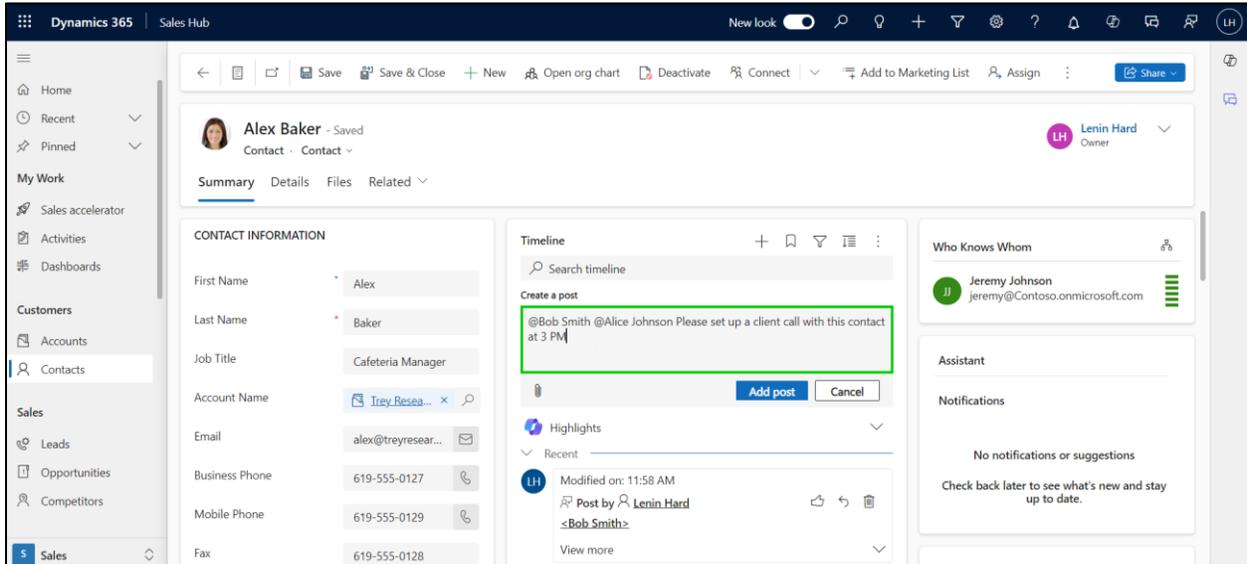
For example, Lenin, a sales manager, wants two of his salespersons, Bob and Alice, to set up a client call. Hold Mery, a senior salesperson, responsible for getting the gist of the call from Bob and Alice. With the post notification feature, Lenin can tag Bob and Alice to send a custom post message regarding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

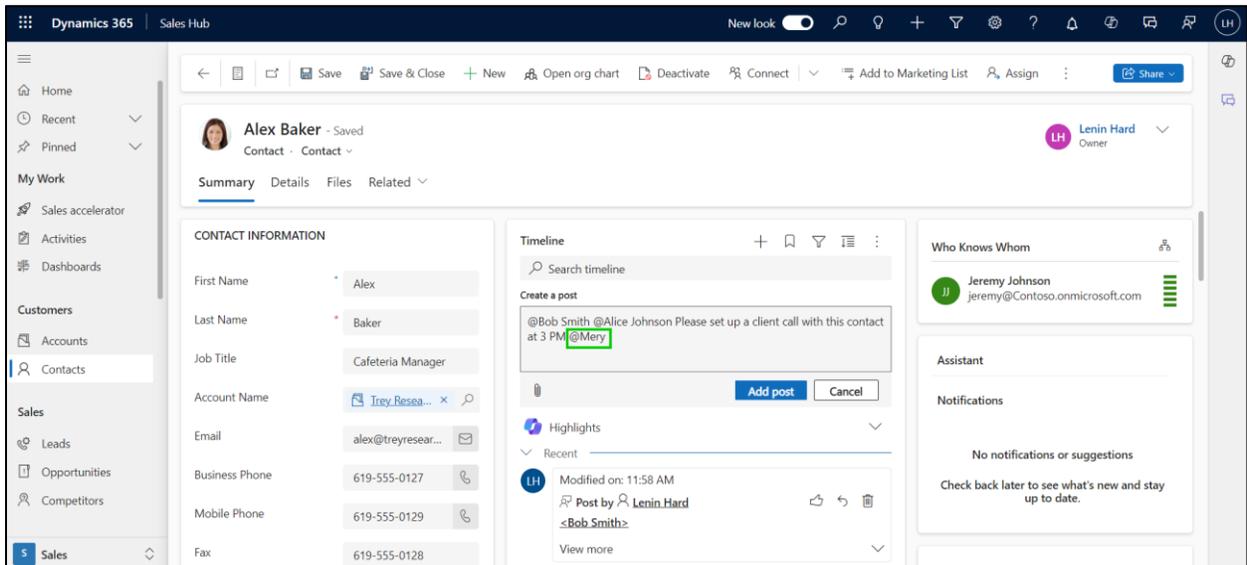


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- Go back to the record and tag the users you want to deliver the custom post message to and type the Message.



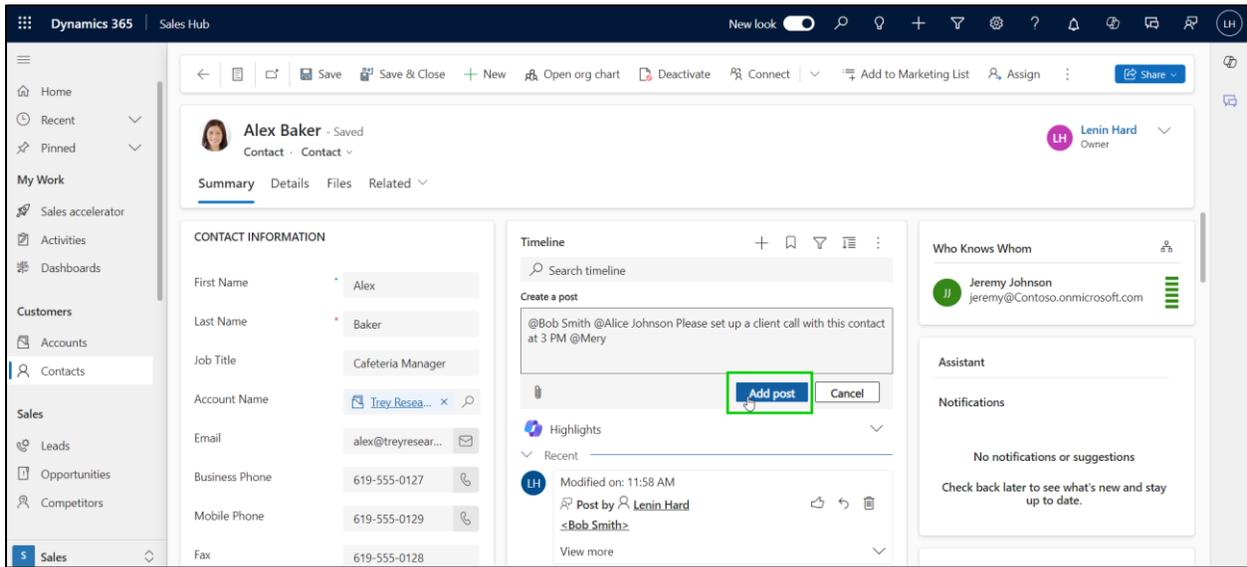
- Now tag the user to whom you want to deliver the message that you have set up in the workflow.



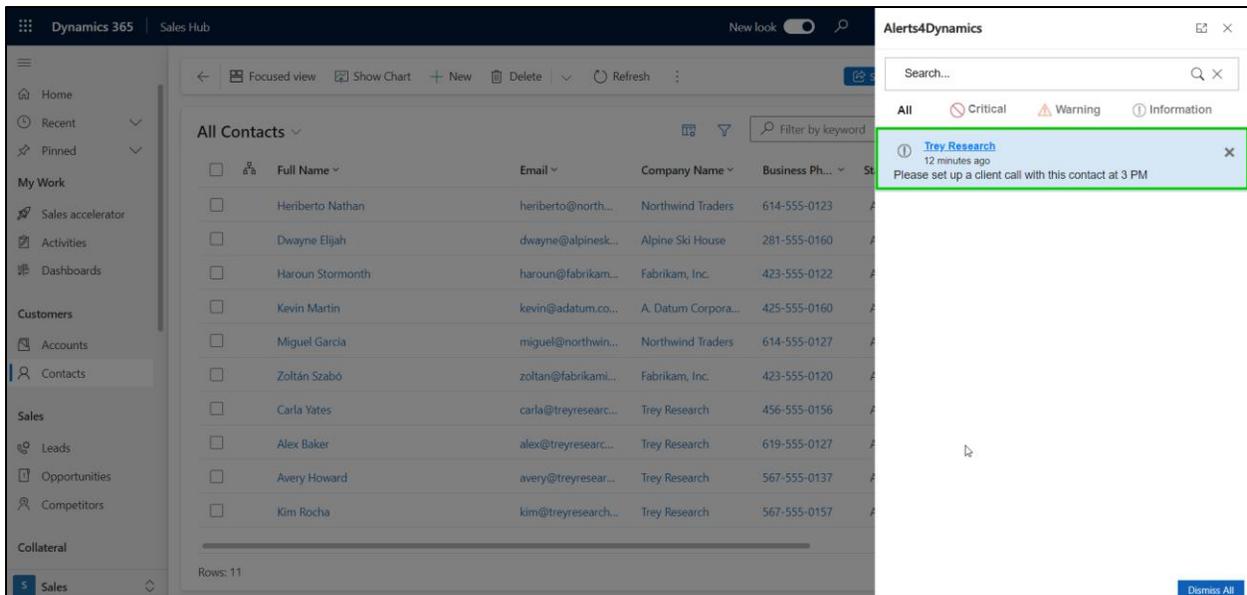
Note: To type a custom post message, follow the pattern: "**@username then message.**" If you type the message before "**@username,**" then you won't receive the custom message notification in the alert panel. However, if you have already configured a workflow to deliver a common message, your users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

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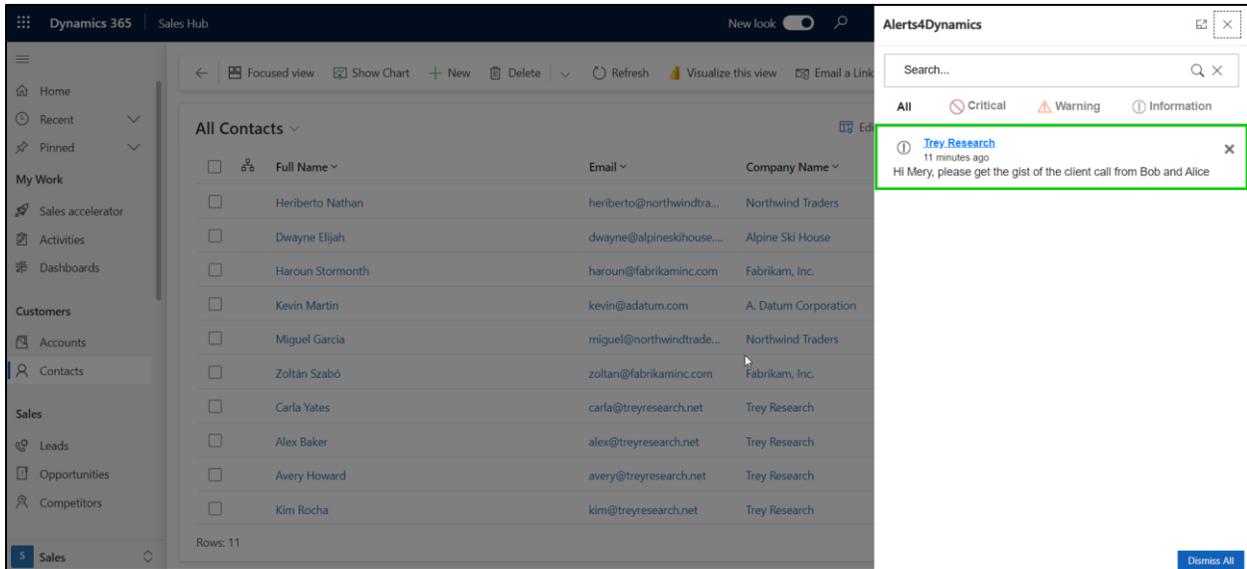


- Now the users you've tagged in the custom post message will receive notifications with the custom post message.
- To see the post notification, log in with the user who is mentioned in the post.



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

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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**.

The screenshot shows the 'Active Logs' section of the Alerts4Dynamics Logsbeeb interface. The table has columns for Entity Name, Process, Entity Schema Name, and Created On. The 'Alerts4Dynamics Logs' option in the left navigation pane is highlighted with a green box.

Entity Name	Process	Entity Schema Name	Created On
	CreateNotifications		11/12/2022 2:3...
	CreateNotifications		11/12/2022 8:0...
	CreateNotifications		11/12/2022 4:0...
	CreateNotifications		11/12/2022 12:...
	CreateNotifications		11/11/2022 8:0...
	CreateNotifications		11/11/2022 4:0...
	CreateNotifications		11/11/2022 4:0...

Notify Failure Configuration

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

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

Given below is the step to enable notify failure:

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

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

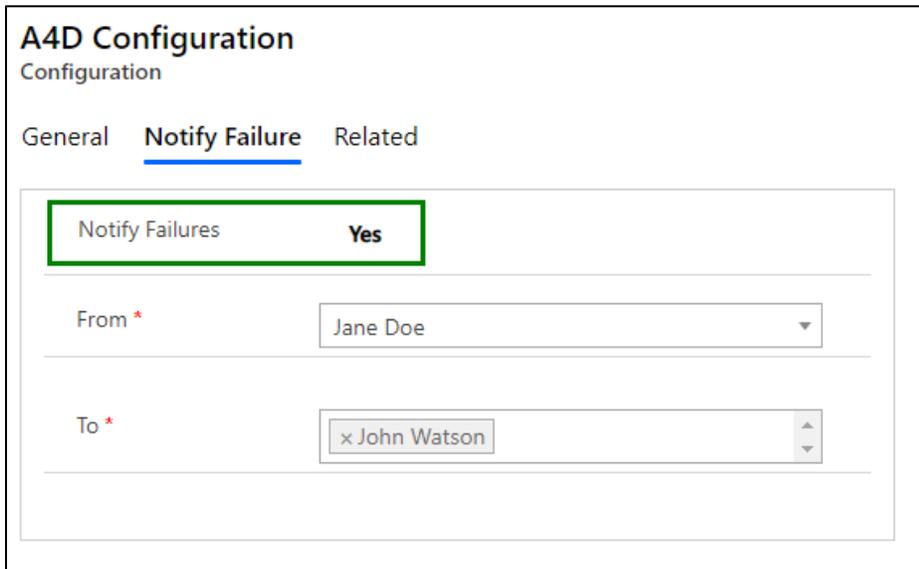
By default the field is set as **'No'**, which means no notification mails about the error logs will be sent.



The screenshot shows the 'A4D Configuration' form with the 'Notify Failure' tab selected. The 'Notify Failures' field is set to 'No'.

A4D Configuration		
Configuration		
General	Notify Failure	Related
Notify Failures		No

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.



The screenshot shows the 'A4D Configuration' form with the 'Notify Failure' tab selected. The 'Notify Failures' field is set to 'Yes'. The 'From' field is populated with 'Jane Doe' and the 'To' field is populated with 'x John Watson'.

A4D Configuration		
Configuration		
General	Notify Failure	Related
Notify Failures		Yes
From *	Jane Doe	
To *	x John Watson	

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