USER MANUAL

Smart Alerts

Version: 2.2

Compatibility:
Microsoft Dynamics CRM 2016 and
Microsoft Dynamics 365

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Introduction

Smart Alerts for Dynamics CRM is a meticulously developed plugin that enables Dynamics CRM users to add and manage alerts for different entities in the CRM. Once Microsoft Dynamics CRM Smart Alerts is integrated, CRM users can add critical data/information to individual records. Thereafter, every time the connected CRM users access a particular record, they will receive an alert about the upcoming events, workflows, follow-ups and other actions that need immediate attention.

Using Smart Alerts for Dynamics CRM, you can manage bulk alerts, add multiple alerts for each record, set alert types, cascade alerts, set criteria-based alerts, get alert in email directly, manage user roles, add start and expiry date for each alert and do much more!

Smart Alert can smartly be configured and used in any language the CRM supports.

Benefits of Smart Alerts

- Address customer issues on time
- Reduce Response Cycles
- Streamline Business Processes
- Never miss on Follow-ups
- Enable users to take immediate action
- Boost productivity

Prerequisites

Following point must be followed before starting the Plugin installation:

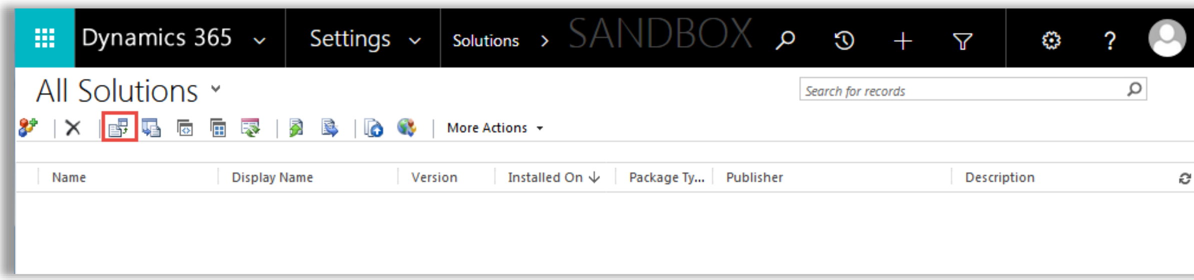
- You should be logged into Dynamics CRM 2016 or Dynamics 365, Online or On-premises.

Installation & Configuration

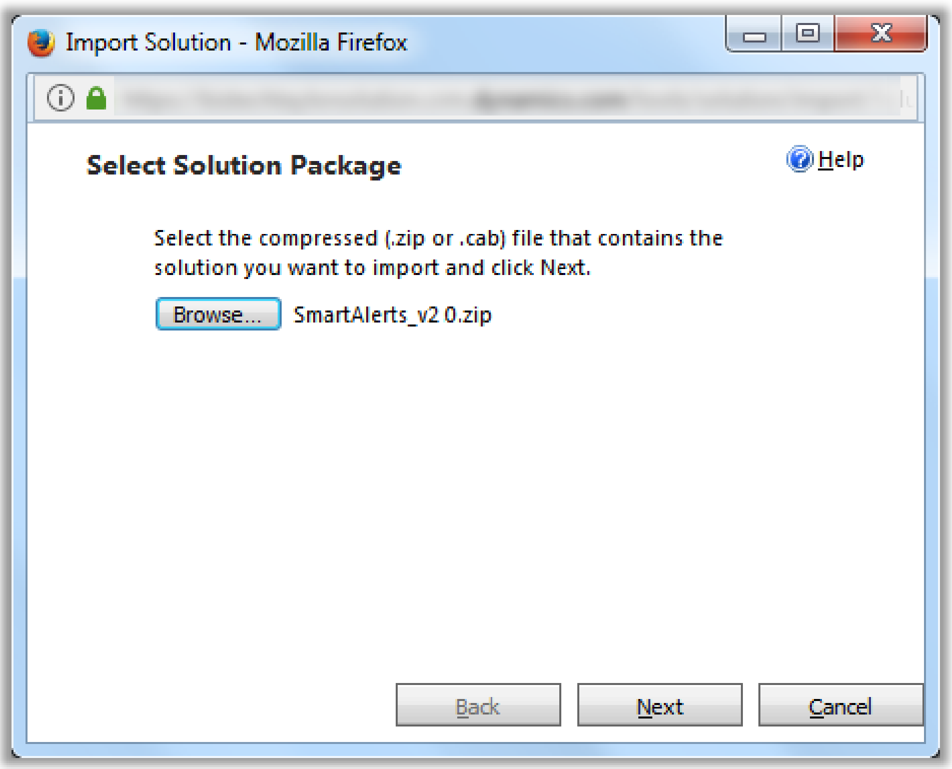
Installation Steps

To install 'Smart Alerts' plugin, the following steps has to be followed:

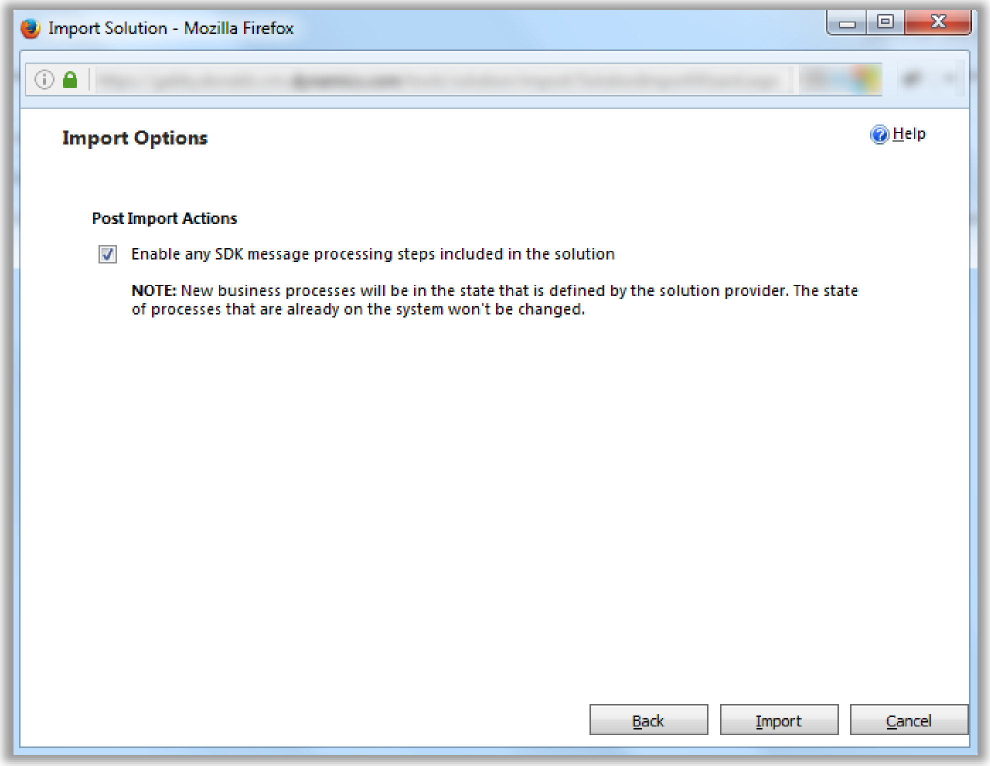
- On purchasing the plugin, you will get a zip file named **"SmartAlerts-v2.2.zip"**.
- Login into your CRM Account and click **on Settings -> Solutions.**



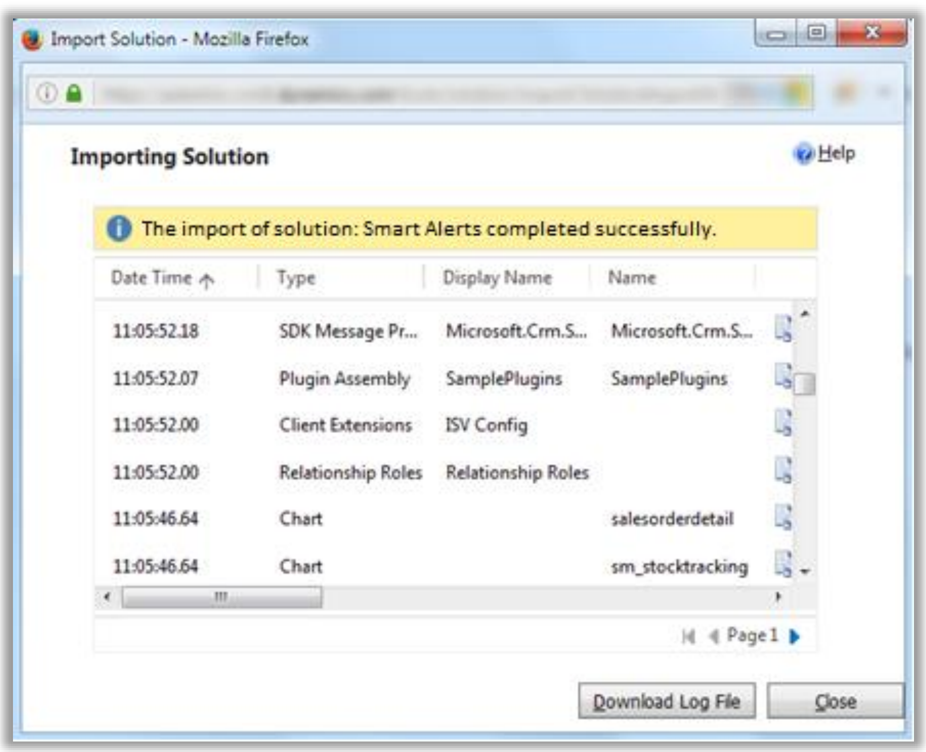
- Click on **'Import'** to upload and install the Solution.
- Click on **'Browse'** button and choose the Package Zip File for Smart Alerts from the Import Solution Window.



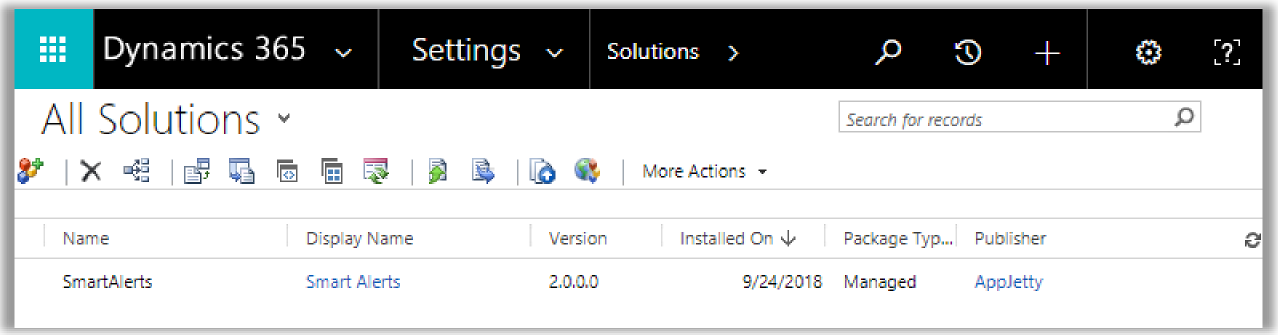
- Click on **'Next'** for further processing.



- Check the box to enable any SDK message processing steps included in the solution and click on **'Import'** button to Import the Solution.



- Click on **'Close'** after successful completion message is displayed.

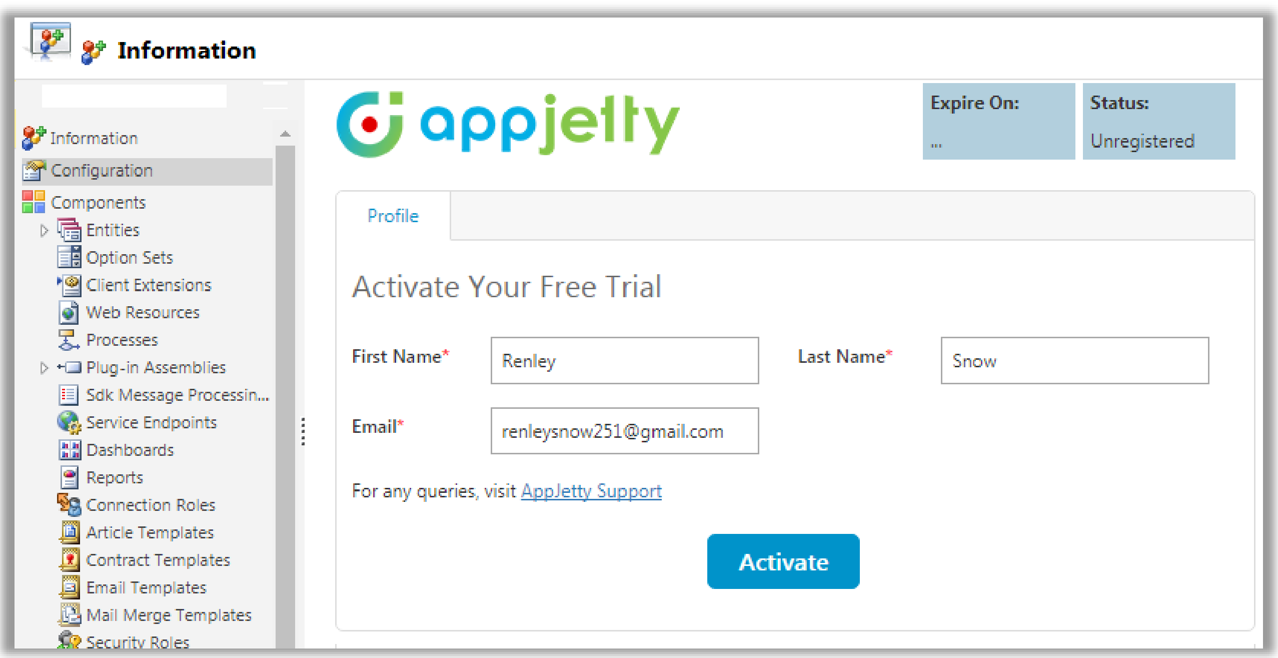


- Once you import the solution, it will be displayed in the solutions grid view.

Configuration Steps

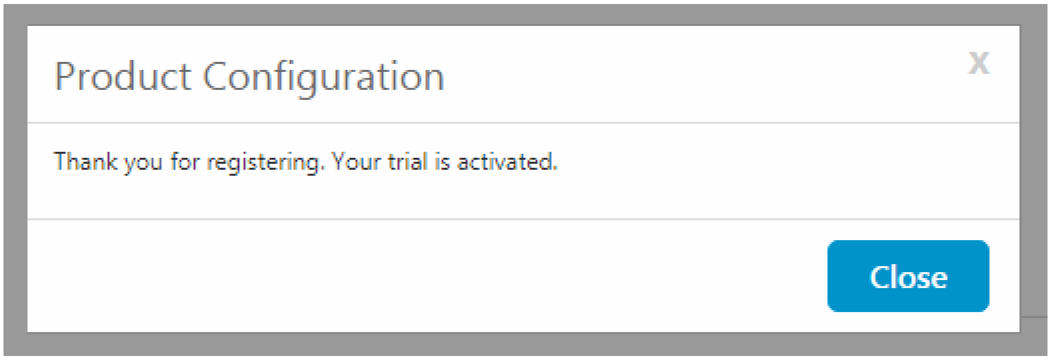
- Double click on **'Smart Alerts'** solution to configure the plugin with your license key.

- This will open a new window. Click on **'Configuration'** from the options provided on the left side.

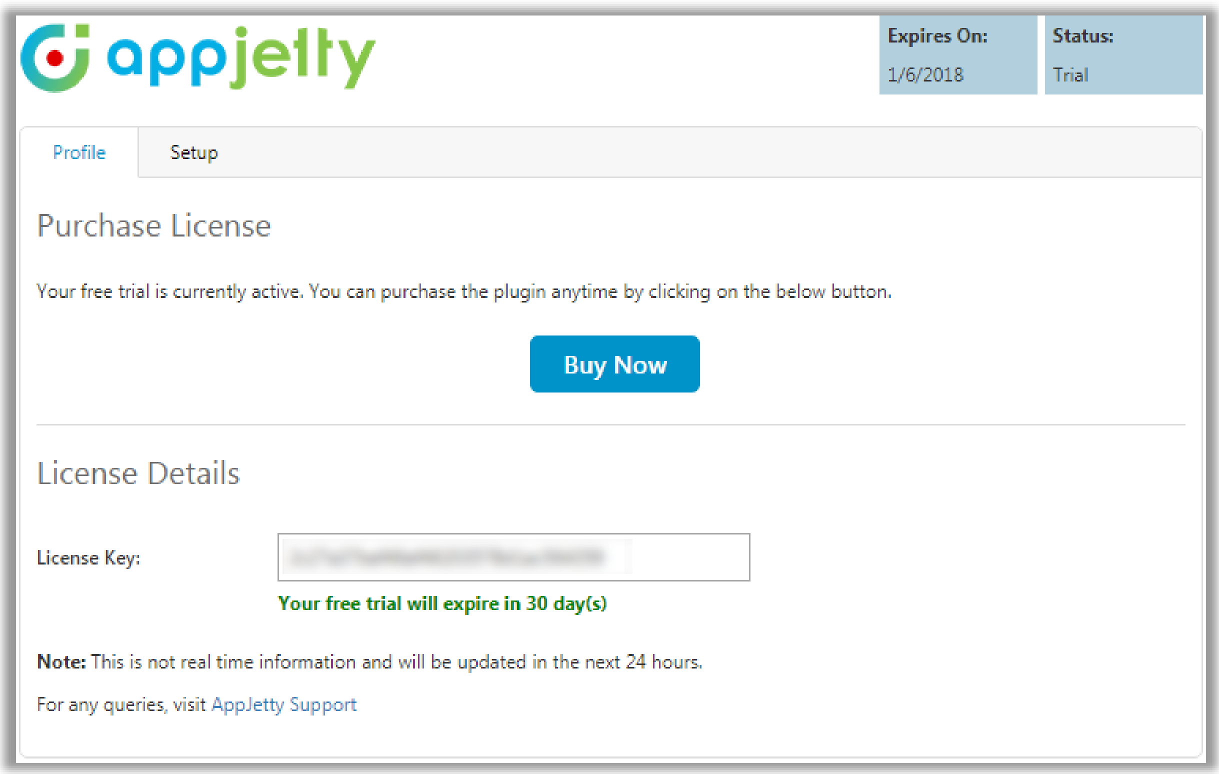


- You can activate your one-month free trial.

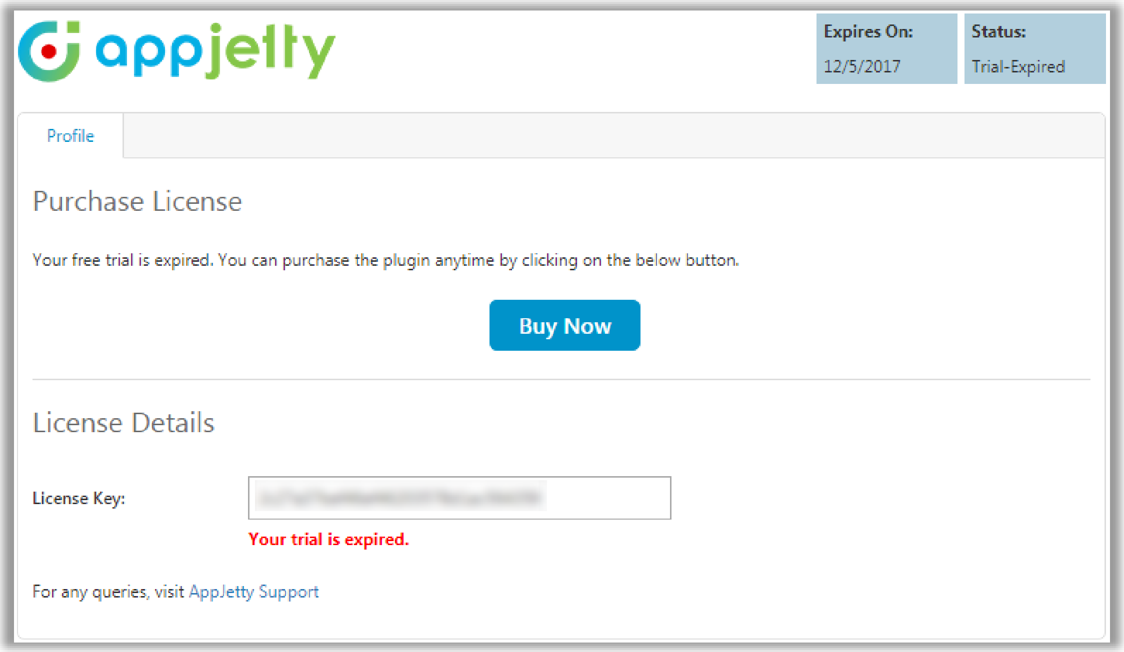
- To get a one-month free trial license key, fill out the details and click on **'Activate'** button.



- Your trial will get activated and expiry date will be displayed on top.

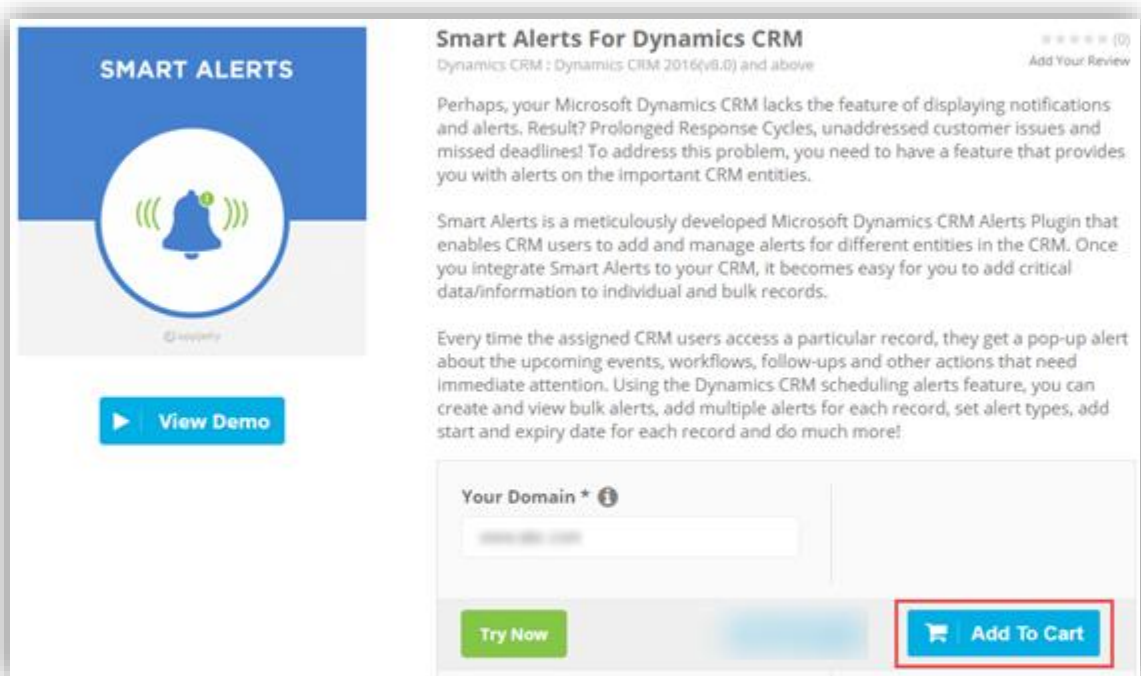


- You can purchase the licensed version any time. To purchase the license, click on **'Buy Now'** button.

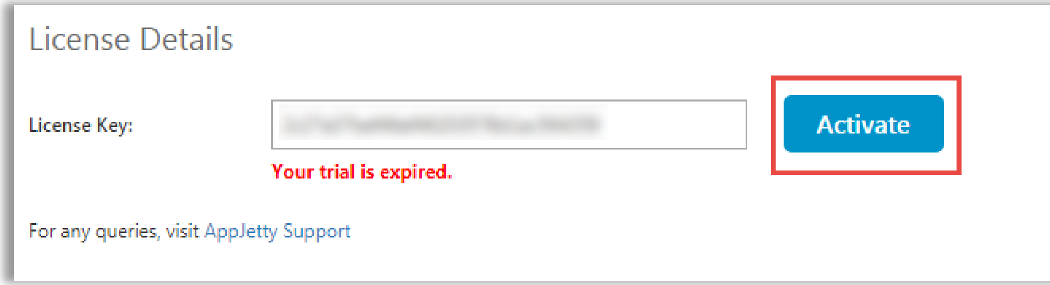


- On expiration of Trial, a message will appear that the Trail is expired. Now to purchase the license click on **'Buy Now'** button.

- This will redirect you to our product page and a pop-up will appear. Click on **'Add to Cart'** button and complete the purchase process.

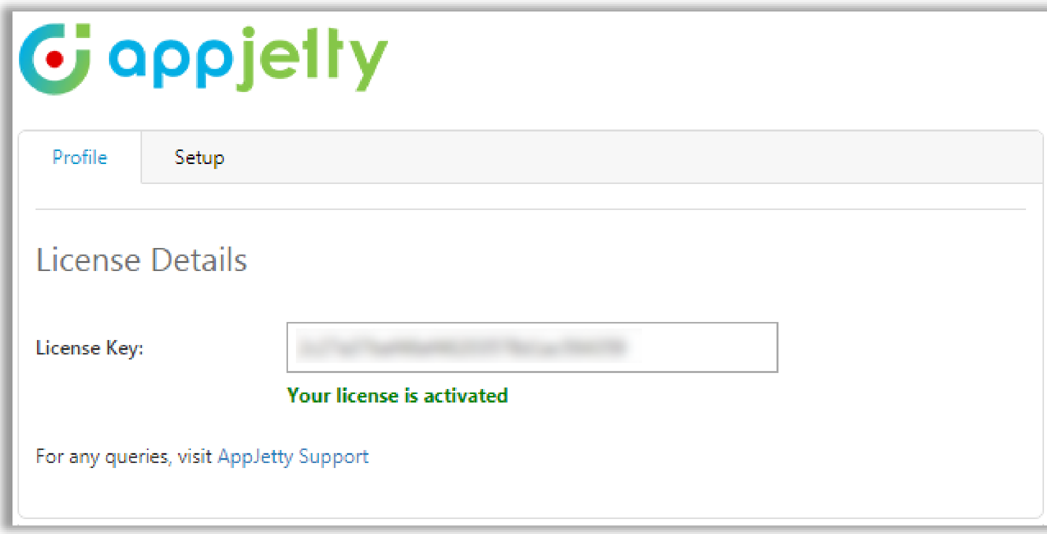


- On successfully completing the purchase process, you will receive your license key via email along with steps to complete the license configuration.



- Enter the New License key received on mail. This will enable the **'Activate'** button.

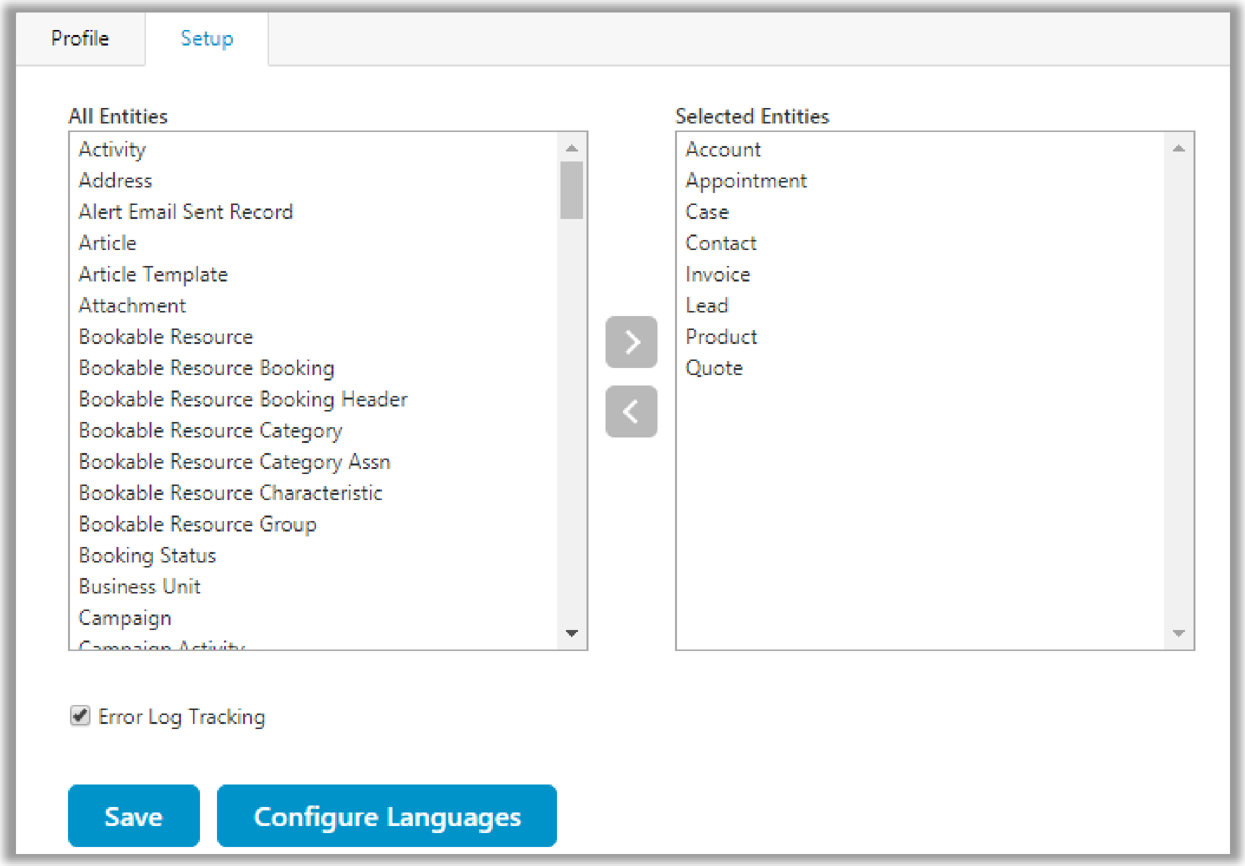
- Click on **'Activate'** button to activate your license.



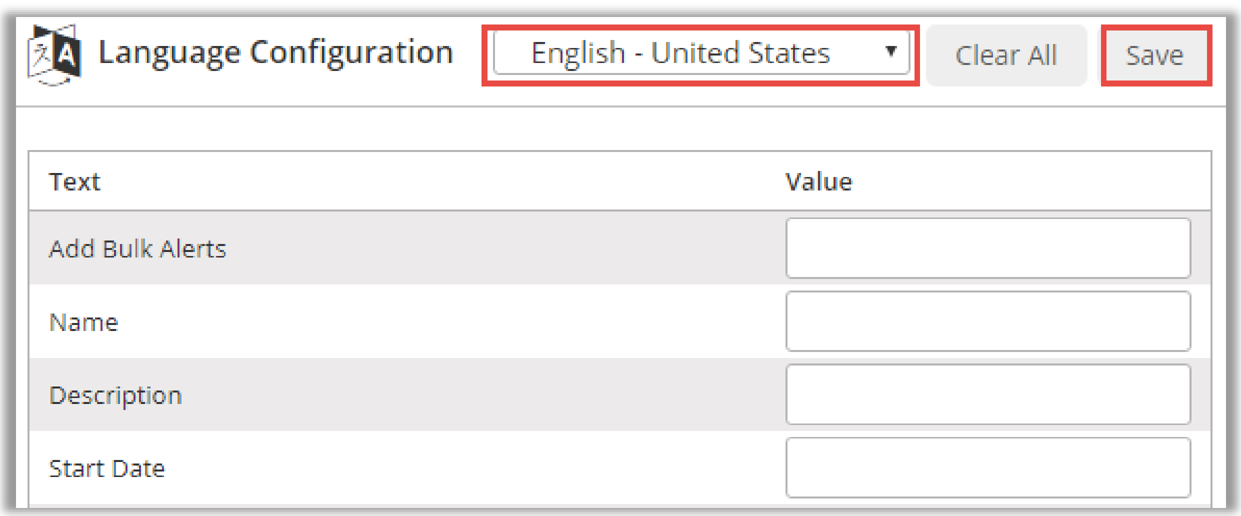
- Once you have activated the license, **'Setup'** tab will be displayed besides the **'Profile'** tab.

- To manage the default configuration settings, click on **'Setup'** tab.

- From **'Setup'** tab, you can move required entities to **"Selected Entities"** list from **"All Entities"** by using "**Add**" and "**Remove**" button.



- Click on **"Configure languages"** button, to configure Smart Alert in any CRM supported language you want.

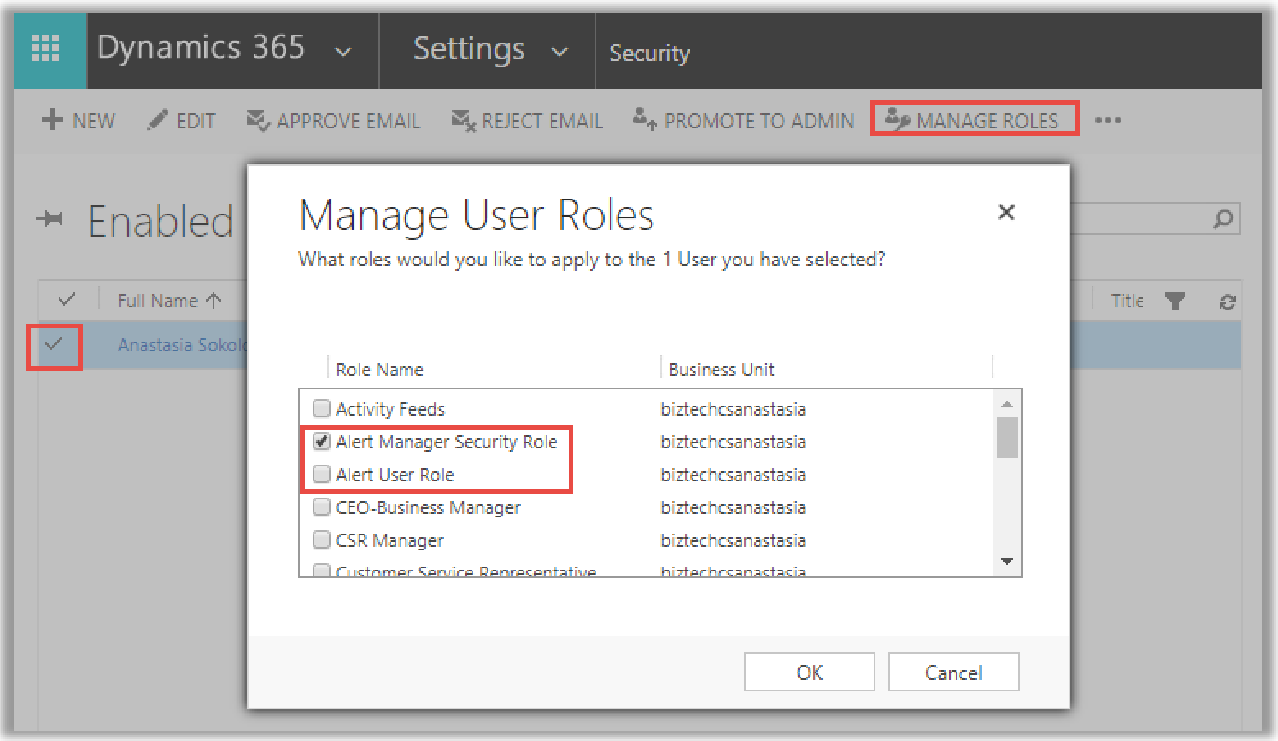


- After selecting entities and configuring language, click on **"Save"** button to save.

Note: User can use Smart Alerts on selected entities only.

Manage User Roles

- To assign roles to users, navigate to Settings -> Security -> Users
- In the list, select the user or users whom you want to assign a security role.
- Once users are selected, click on **"Manage Roles"** option from users list page.
- From dialog box, select the security roles you want to assign.

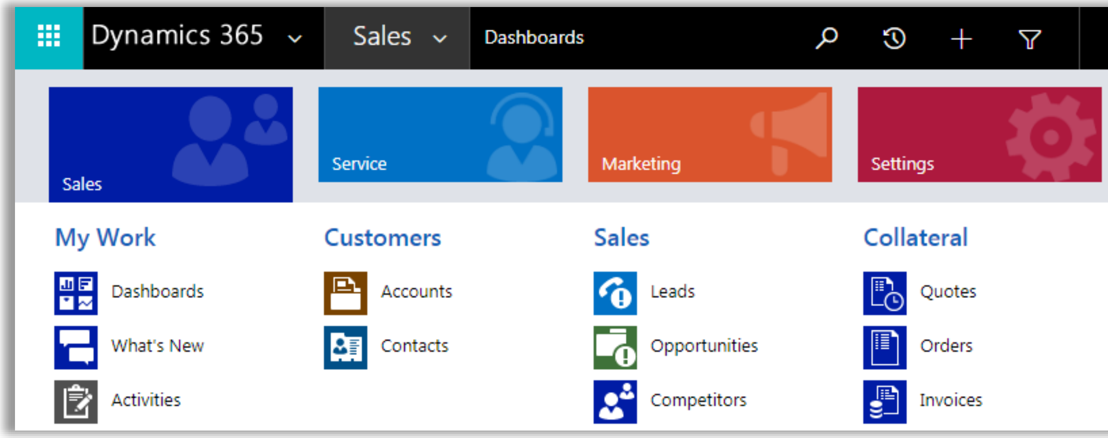


- You can set the following roles for a **Smart Alert Users**:
    - **Alert Manager Security Role**: CRM User will be able to create, view, edit and delete alerts.
    - **Alert User Role:** CRM User will be able to create, view and edit alerts. He/she will not be able to delete alerts.

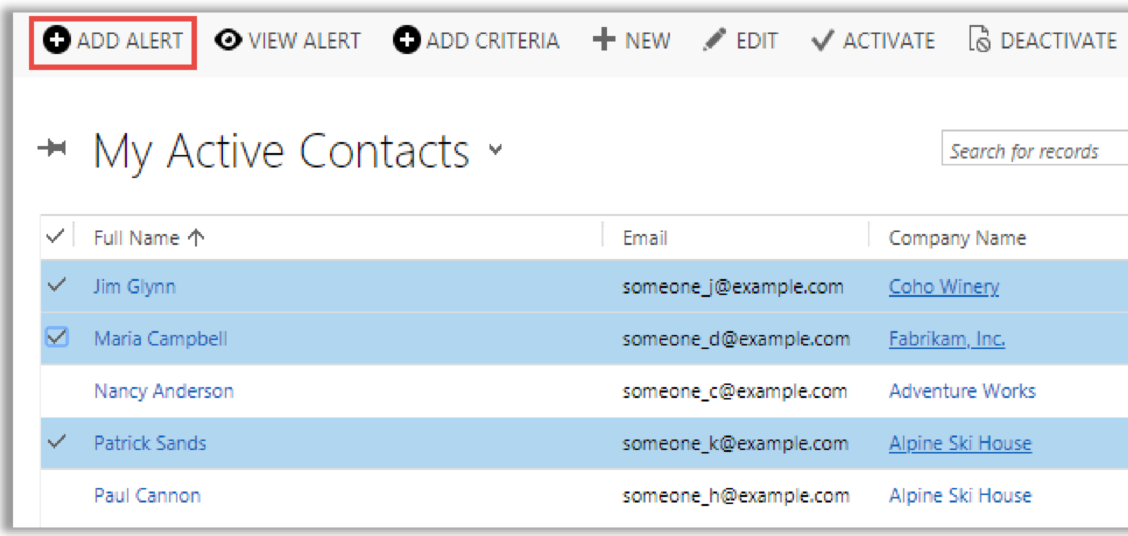
Procedure

Add Bulk Alert

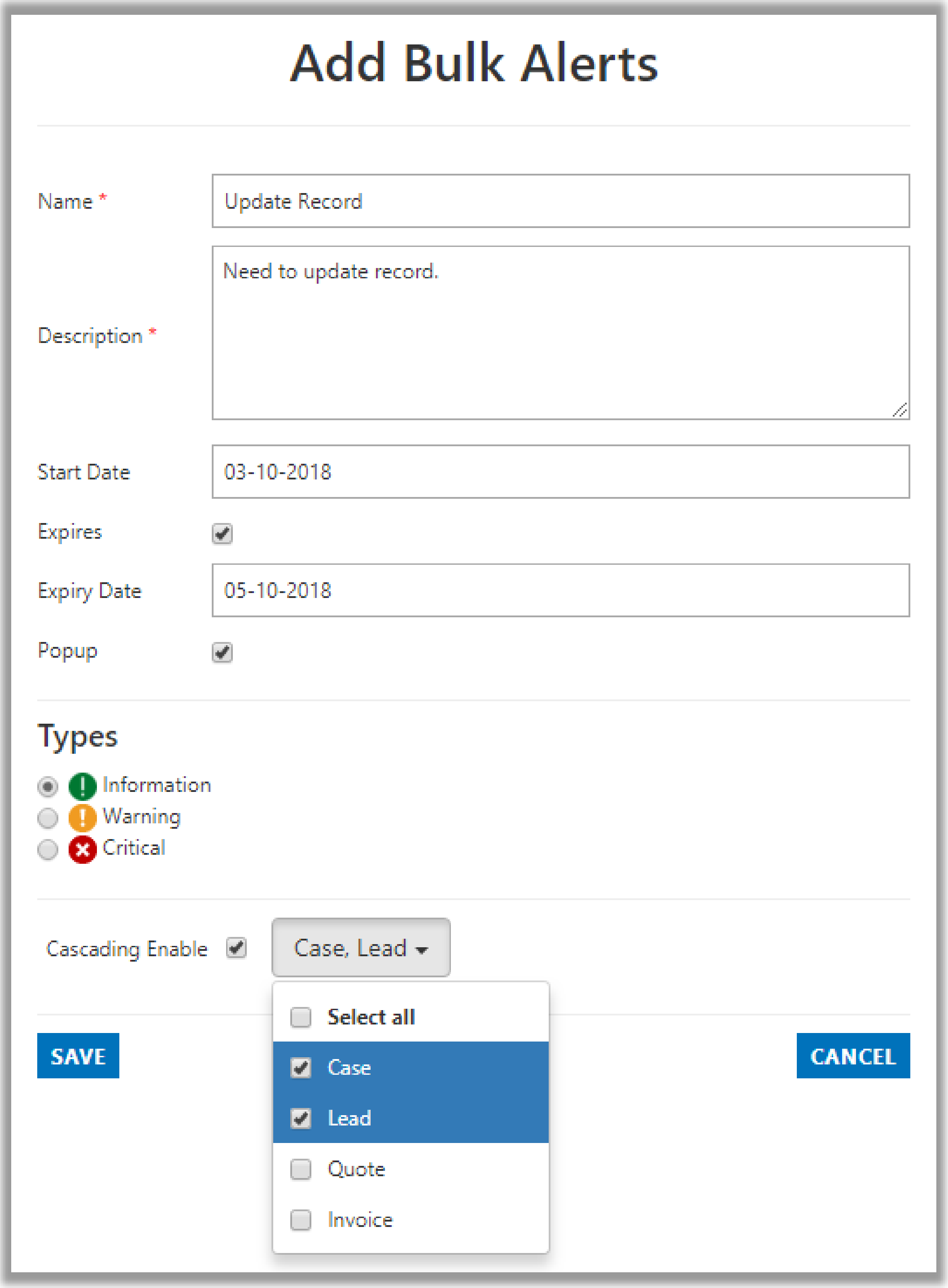
- Navigate to an entity for which you want to set alerts. For example, if you want to set alerts for contacts, go to **sales -> Contacts.**



- Select records for which you want to set alert.



- Click on **"Add Alert"** button, this will open a new window for creating bulk alert, applicable for all records which are selected.

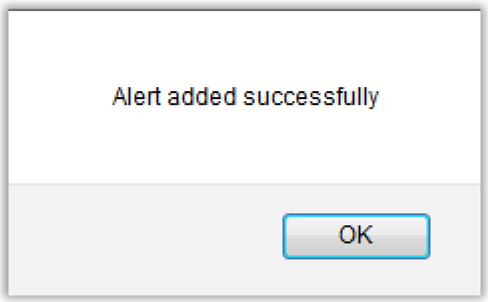


- **Name**: It will help to identify the alert by its name.
- **Description**: It will contain the brief description of alert.
- **Start Date:** It will hold the date from which the alert will be active.

- **Expires:** If it is checked, then it will hold the date on which your alert will expire.
- **Expiry Date:** It will set the expiry date for alert.
- **Popup:** If it is checked, it will display alert message in popup, when that particular record is opened.
- **Types**: It will set the alert type as **Information**, **Warning,** or **Critical**.
- **Cascading Enable**: It will allow to cascade the alerts of related entities` records with current entity record. So, for example: In account module, if contact's module records are set as cascading, then while accessing account, it will display alerts of account as well as contact's alert which are related to that account.

  Note: Cascading can only be set for listed entities: **Account, Contact, Case, Lead, Opportunity, Quote, Order** and **Invoice** modules.

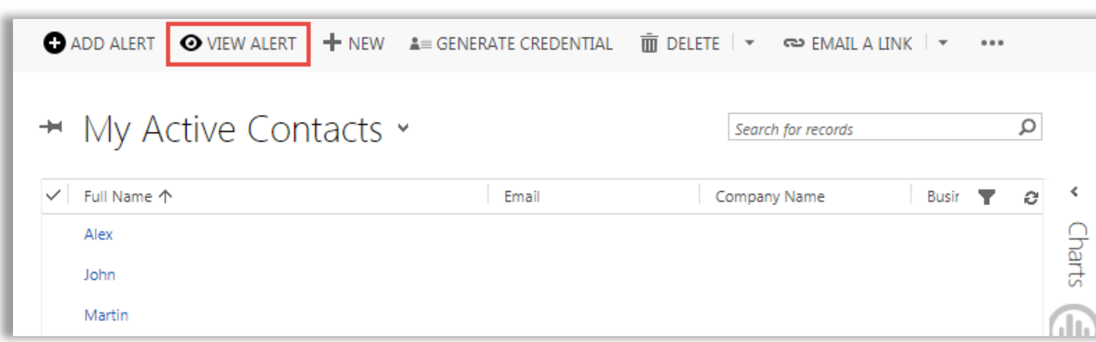
- Once you fill the details, click on **"Save"** button.



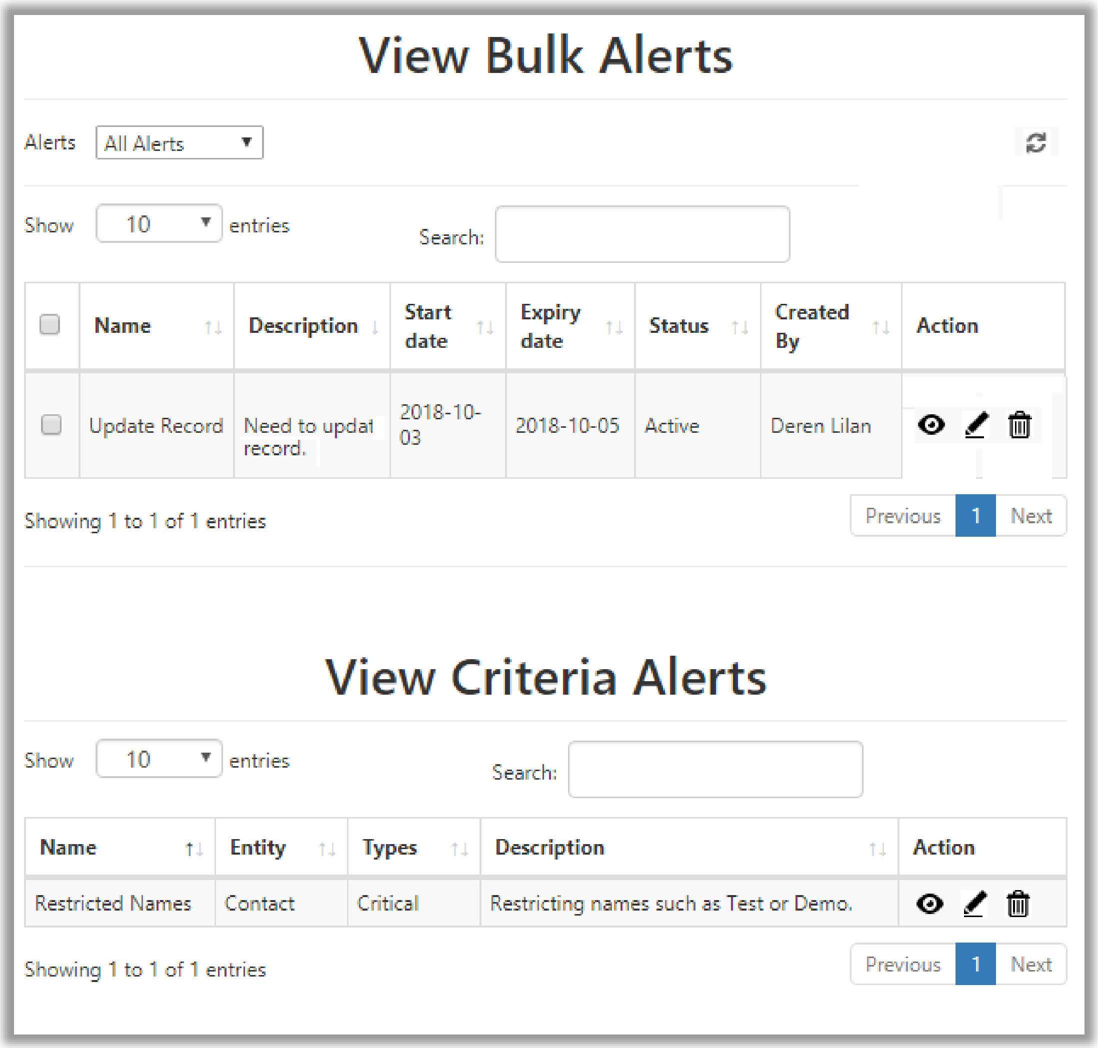
- It will display success/failure message.

View Bulk Alert

- Navigate to an entity for which you want to view alerts. For example, if you want to view alerts for contacts, go to **sales -> Contacts.**



- Click on **'View Alert'** to view the list of bulk alerts and criteria alerts.



- List will also have option to filter alerts.

- Filter options are as below: -

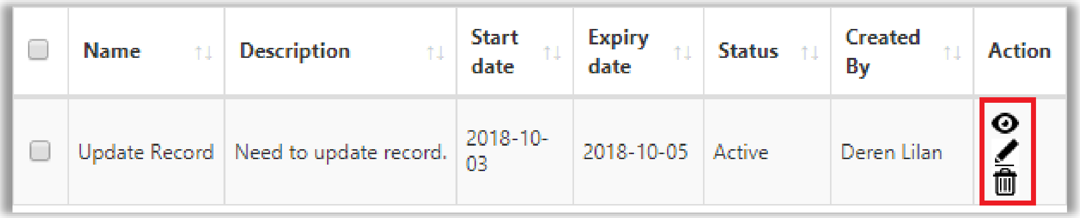
  - **All Alerts -** It will list all alerts.

  - **Active Alerts -** It will list active alerts and you can **"Deactivate"** active alerts.

  - **Inactive Alerts -** It will list inactive alerts and you can **"Activate"** inactive alerts.

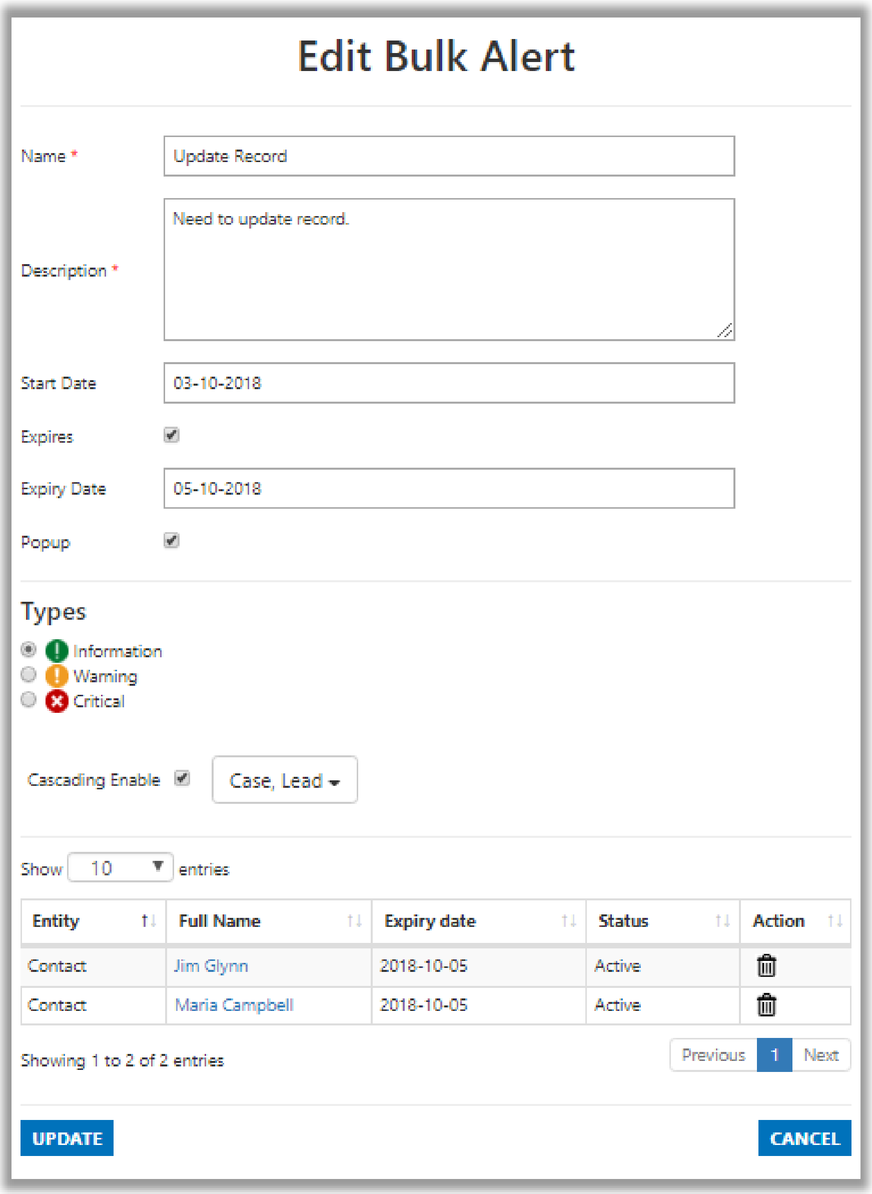
  - **Expired Alerts -** It will list expired alerts and you can **"Activate"** expired alerts by updating the date of expired alert from edit view.

  - **Pop-up Alerts –** It will list all pop-up alerts.



- If you want to edit/delete bulk alert, navigate to alert list, you will find **"Action"** tab from where you can edit/delete specific alert.

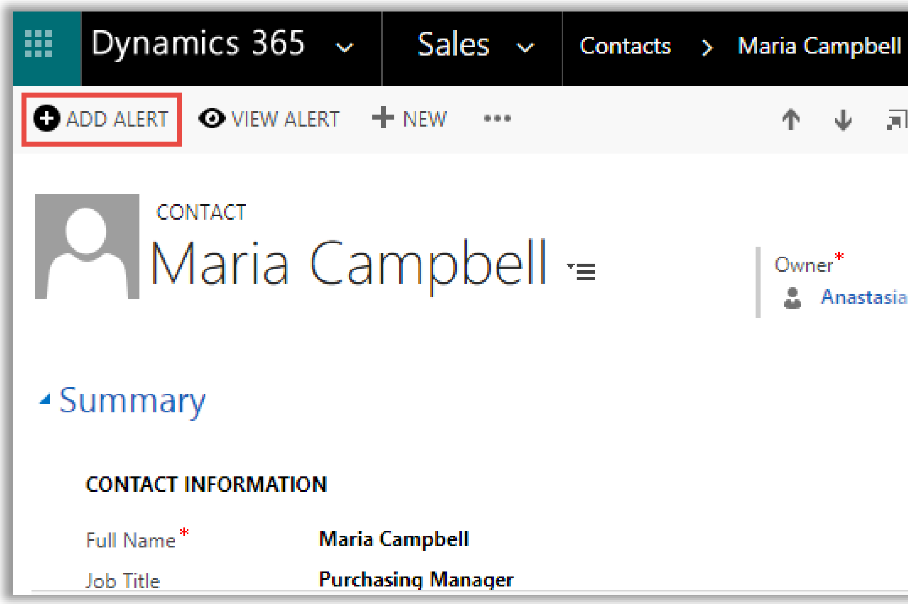
Note: Only user with **'Alert Manager Security Role'** or **'System Administrator Role'** will be able to delete an alert.



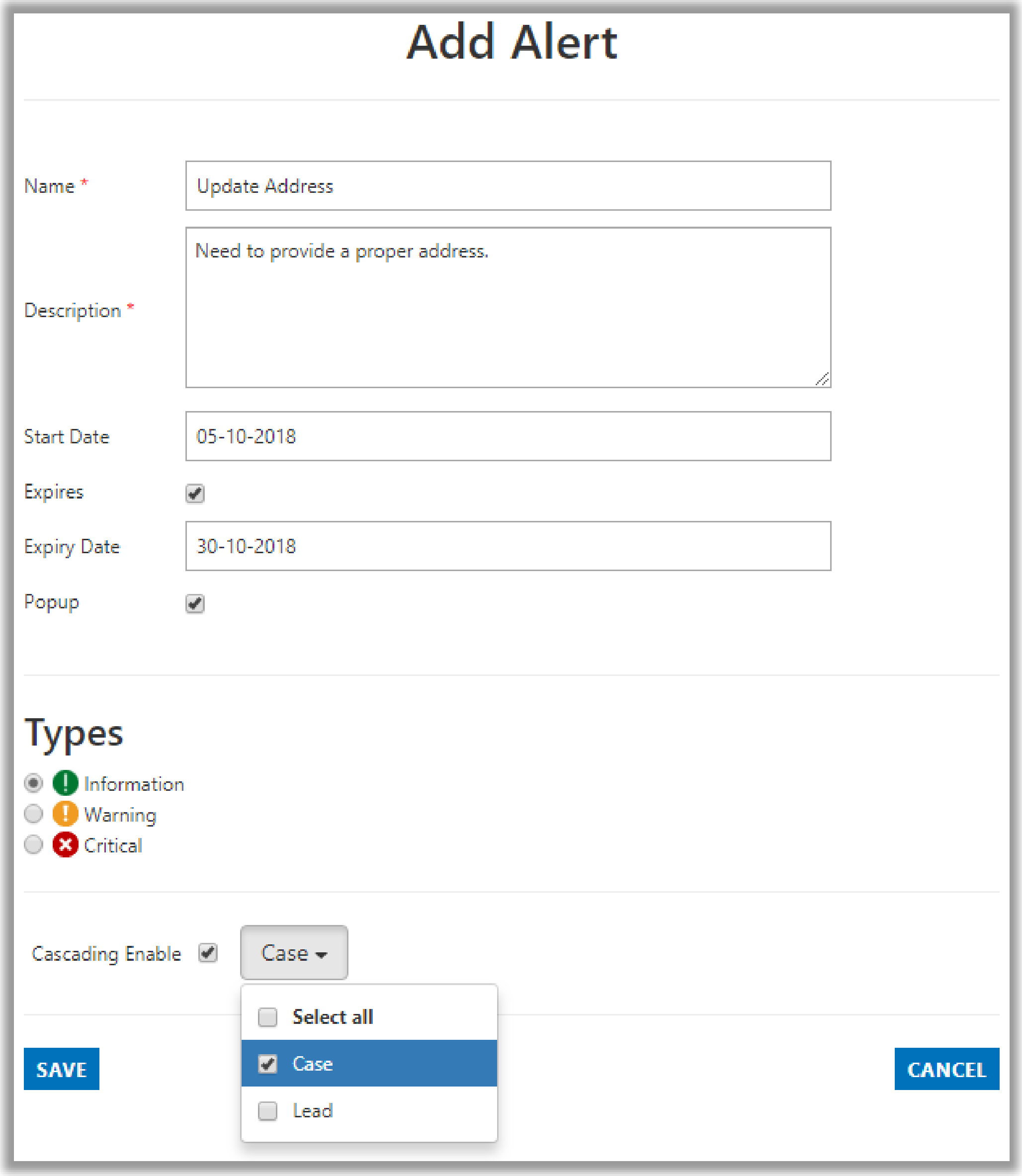
- In edit view, you can even delete record.
- By clicking on record name, you can even navigate to detail view of that particular record.

Add Alert

- Navigate to an entity for which you want to set alerts. For example, if you want to set alerts for contacts, go to **sales -> Contacts.**
- Click on record name and navigate to detail view of that particular record.



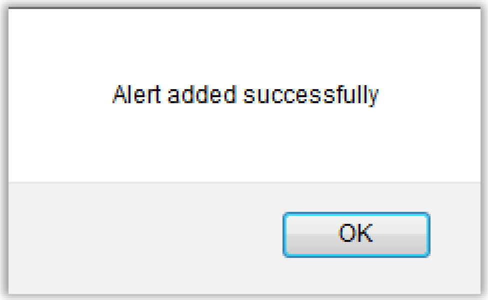
- Click on **"Add Alert"** button to add new alert and fill require details as mentioned below: -
- **Name**: It will help to identify the alert by its name.
- **Description**: It will contain the brief description of alert.
- **Start Date:** It will hold the date from which the alert will be active.
- **Expires:** If it is checked, then it will hold the date on which your alert will expire.
- **Expiry Date:** It will set the expiry date for alert.
- **Popup:** If it is checked, it will display alert message in popup, then that particular record is opened.
- **Types**: It will set the alert type as **Information**, **Warning** or **Critical**.



- **Cascading Enable**: It will allow to cascade the alerts of related entity's records with current entity record. So, for example: If in account module, contact's module records are set in cascading, then while accessing account it will display alerts of account as well as contact's alert which are related to that account.

Note: Cascading can only be set for listed entities: **Account, Contact, Case, Lead, Opportunity, Quote, Order** and **Invoice** modules.

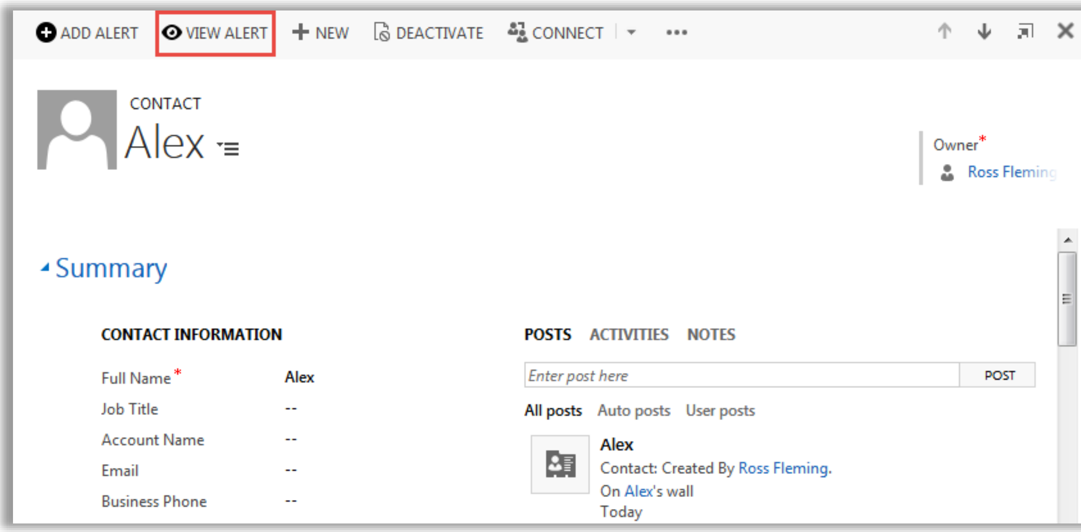
- Once you fill the details, click on **"Save"** button.



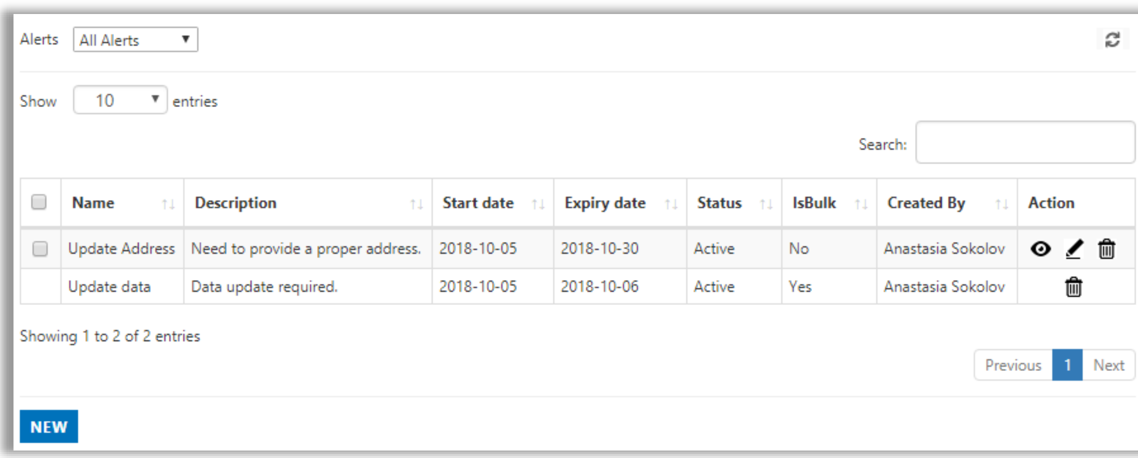
- It will display success/failure message.

View Alert

- Navigate to detail view of that particular record.



- Click on **"View Alert"** to view the list of alerts.



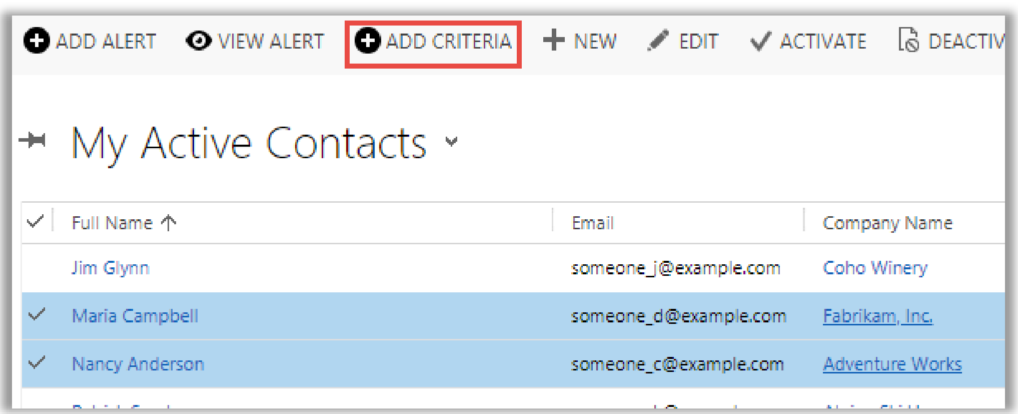
Note: Bulk alerts can only be edited and viewed from bulk alert list.

- The list will also have option to filter alerts.
- Filter option are as below: -
    - **All Alerts -** It will list all alerts.
    - **Active Alerts -** It will list active alerts and you can **"Deactivate"** active alerts.
    - **Inactive Alerts -** It will list inactive alerts and you can **"Activate"** inactive alerts.
    - **Expired Alerts -** It will list expired alerts and you can **"Activate"** expired alerts by updating the date of expired alert from edit view.
    - **Pop-up Alerts –** It will list all pop-up alerts.

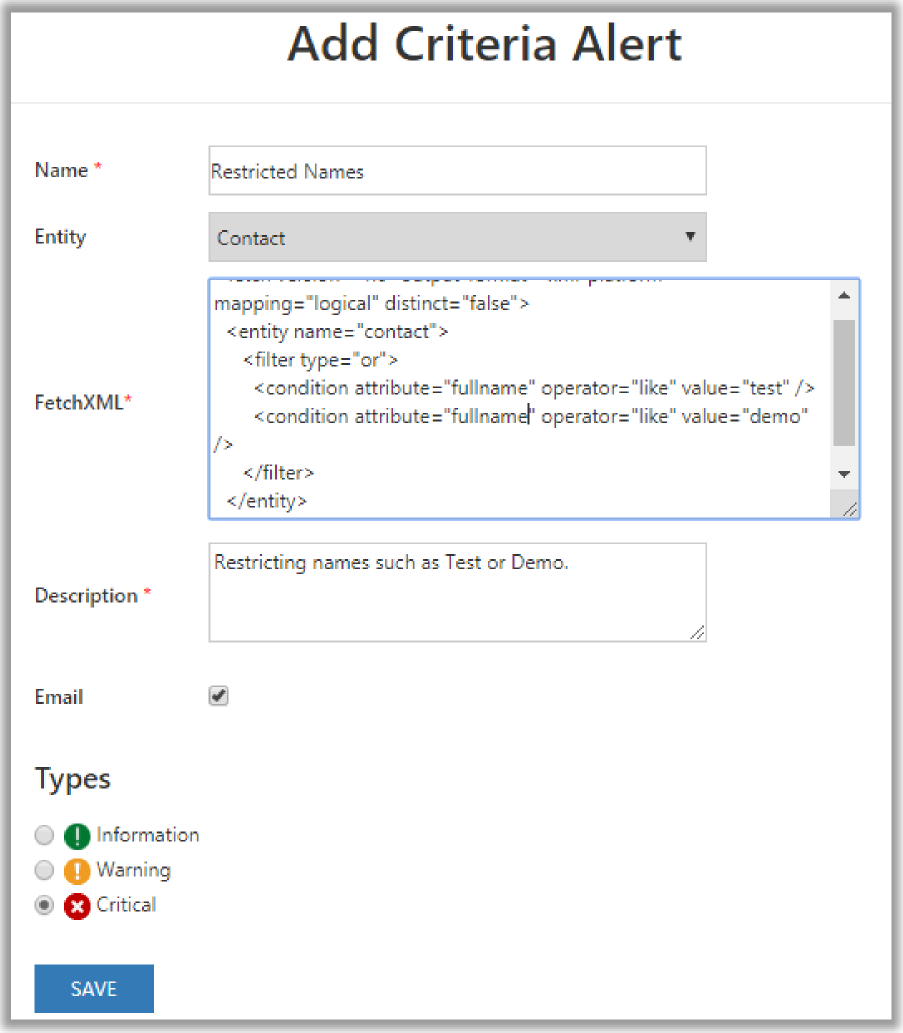
- If you want to edit/delete alert, navigate to alert list, you will find "Action" tab from where you can edit/delete specific alert.
- You can add new alert from view page by clicking on **"New"** button.

Add Criteria Alert

- Navigate to an entity for which you want to set criteria alerts. For example, if you want to set alerts for contacts, go to **Sales -> Contacts.**
- Select records for which you want to set alert.



- Click on **"Add Alert"** button, this will open a new window for creating criteria alert, applicable for all records which are selected.

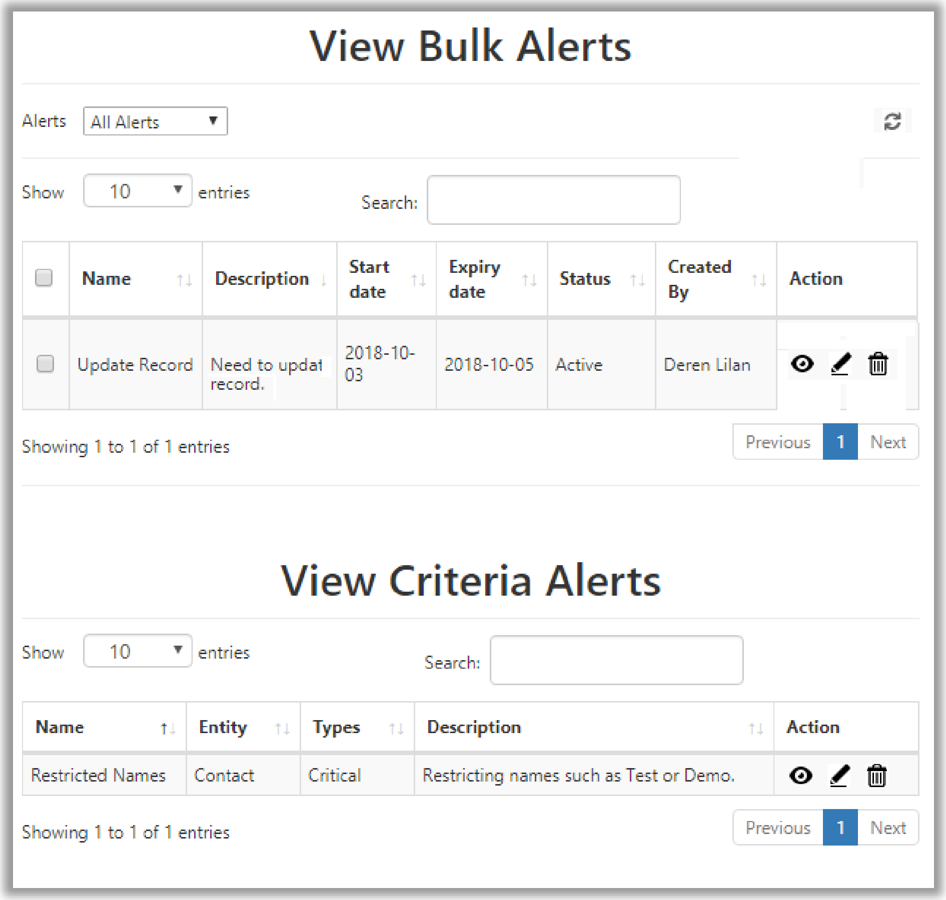


- **Name**: It will contain the brief description of alert.
- **Entity**: It will show the entity name for which the alert is being set.
- **FetchXML:** User can add FetchXML Query file.
- **Expiry Date:** It will set the expiry date for alert.
- **Email:** If it is checked, it will email the alert to the owner of the record.
- **Types**: It will set the alert type as **Information**, **Warning** or **Critical**.
- Once you fill the details, click on **"Save"** button.
- It will display success/failure message.

View Criteria Alert

- Navigate to an entity for which you want to view criteria alerts. For example, if you want to view alerts for contacts, go to **sales -> Contacts.**

- Click on **"View Alert"** from entities listing page to view the list of alerts.

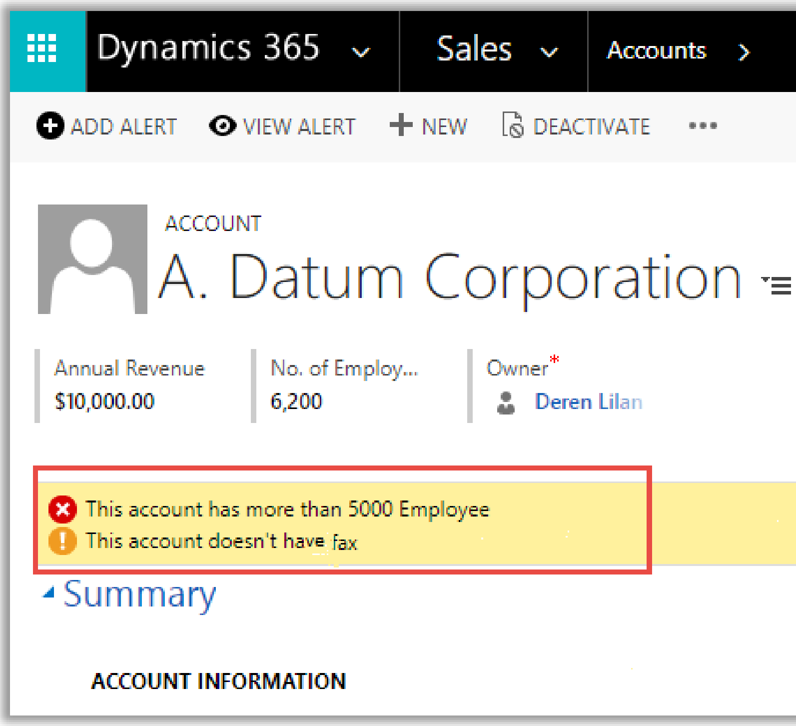


- List will also have option to filter alerts.

- If you want to edit/delete alert, navigate to alert list, you will find **"Action"** tab from where you can edit/delete specific alert.

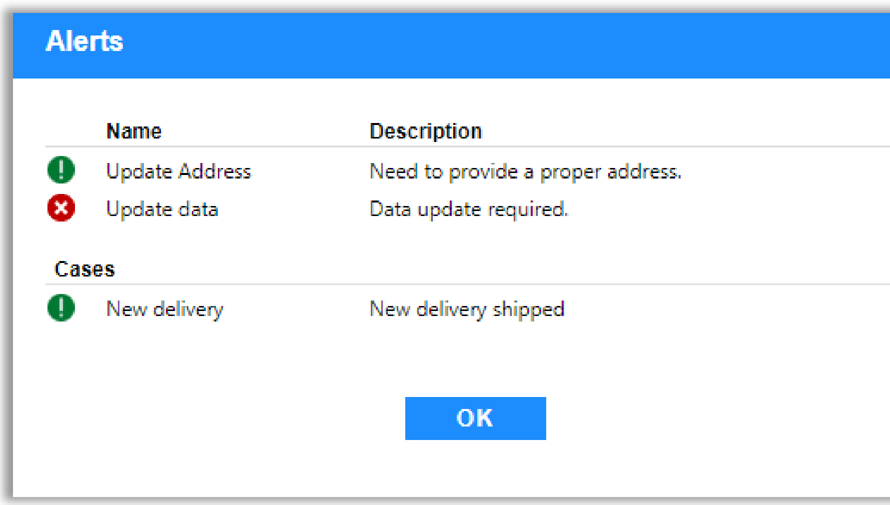
- If you have checked the email option at the time of adding criteria alert, on fulfilling the alert condition, you will get an email.

- Also, if you access any record, then on its open action it will display criteria alert messages, as shown below, for that particular record.



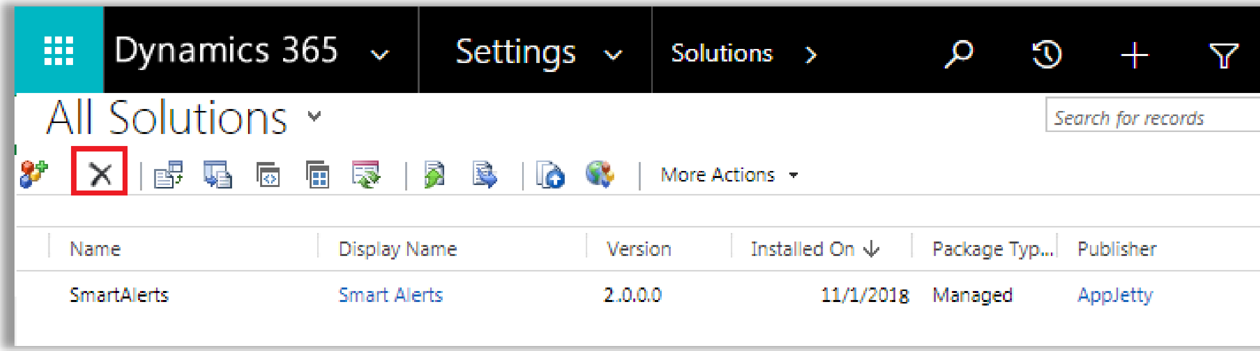
Popup Alert

- If you access any record, then on its open action it will display popup alert message for that particular record.

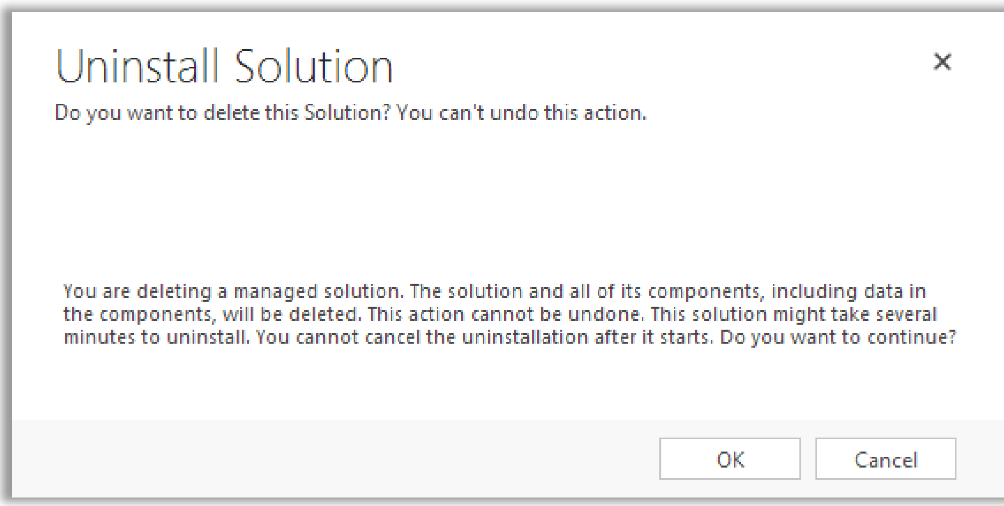


Un-installation Steps

- To uninstall the Solution, navigate to **Settings - > Solutions**.
- Check on the Plugin Name and click on **'Delete'**.



- Click on **'OK'** to Delete and uninstall the solution from CRM.



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We simplify your business, offer unique business solution in digital web and IT landscapes.

Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: https://www.appjetty.com/dynamicscrm-smart-alerts.htm and click on the Live Chat button for instant support.

Tickets

- Raise tickets for your specific question!
- Send an email to support@appjetty.com or you can login to your account @ www.appjetty.com and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

Customization:

If you would like to customize or discuss about additional features for **Dynamics CRM Smart Alerts**, please write to sales@appjetty.com