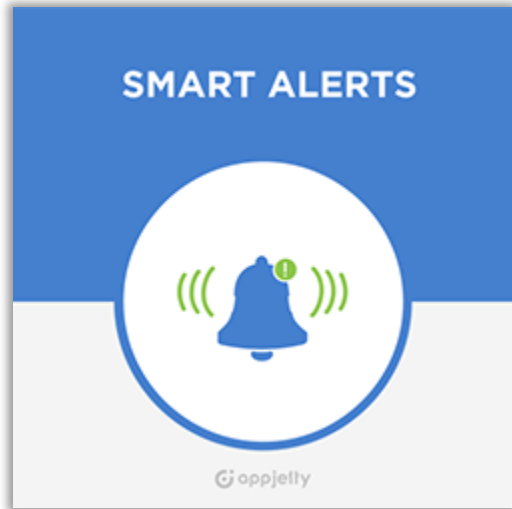


USER MANUAL



Smart Alerts

Version: 3.1

Compatibility:

Microsoft Dynamics 365 (Online and On-premise)

Browser Compatibility:

Edge (v12) and above
Firefox (v29) and above
Chrome (v33) and above
Safari (v7.1) and above
Opera (v20) and above

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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:

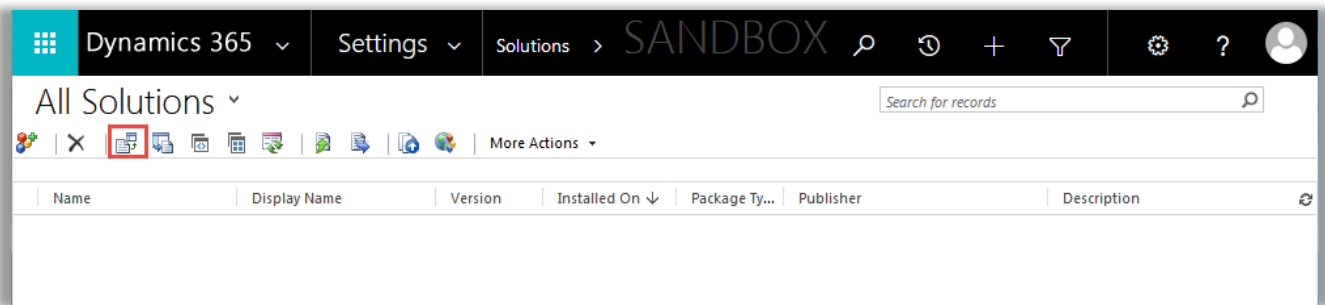
- You should be logged into Dynamics 365, Online or On-premises.

Installation & License Activation

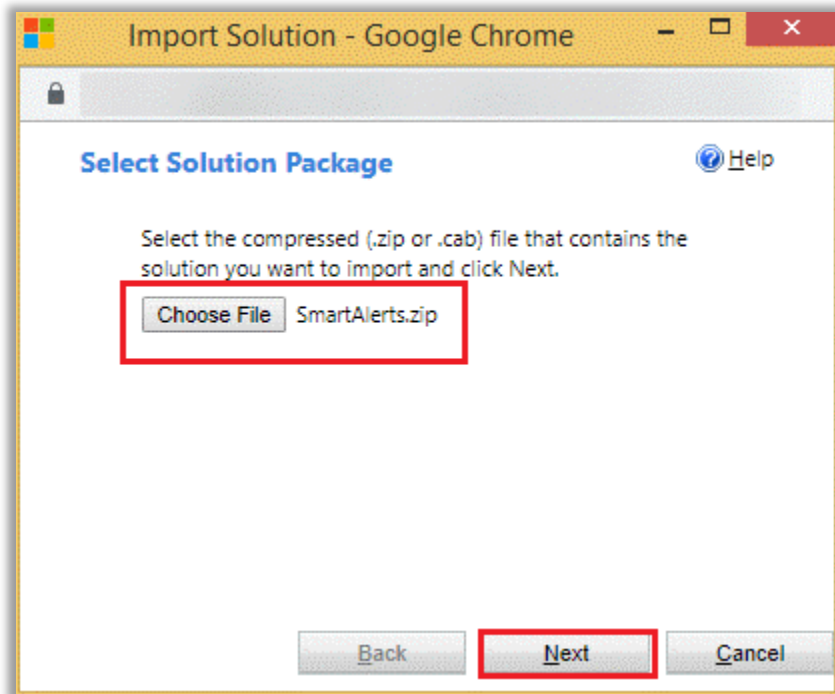
Installation Steps

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

- On purchasing the plugin, you will get a zip file named "SmartAlerts.zip".
- Login into your CRM Account and click on **Settings -> Solutions**.
- Click on '**Import**' to upload and install the Solution.



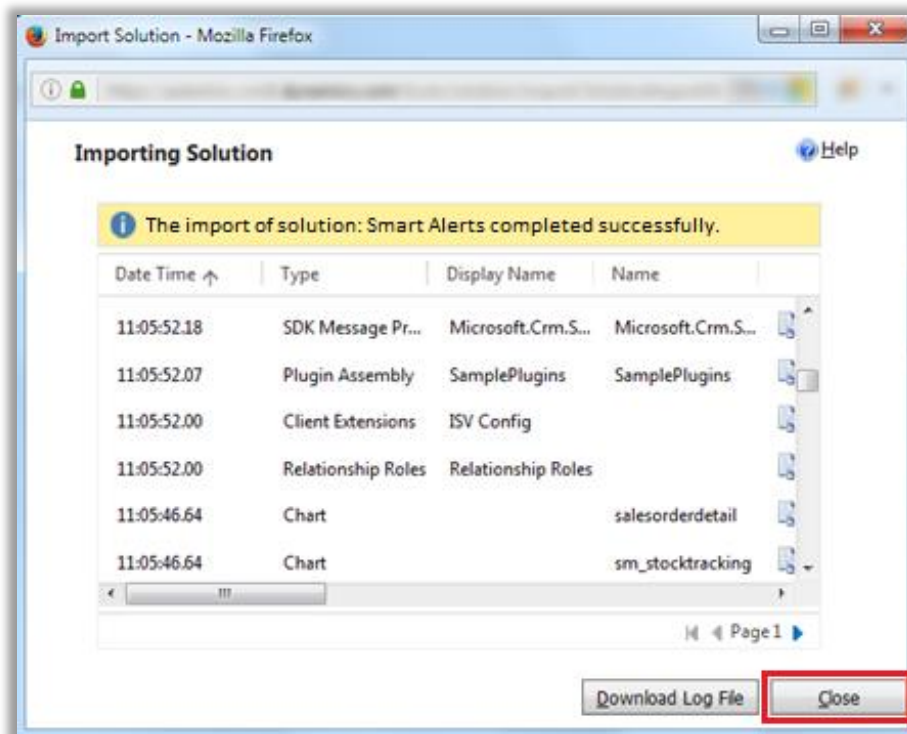
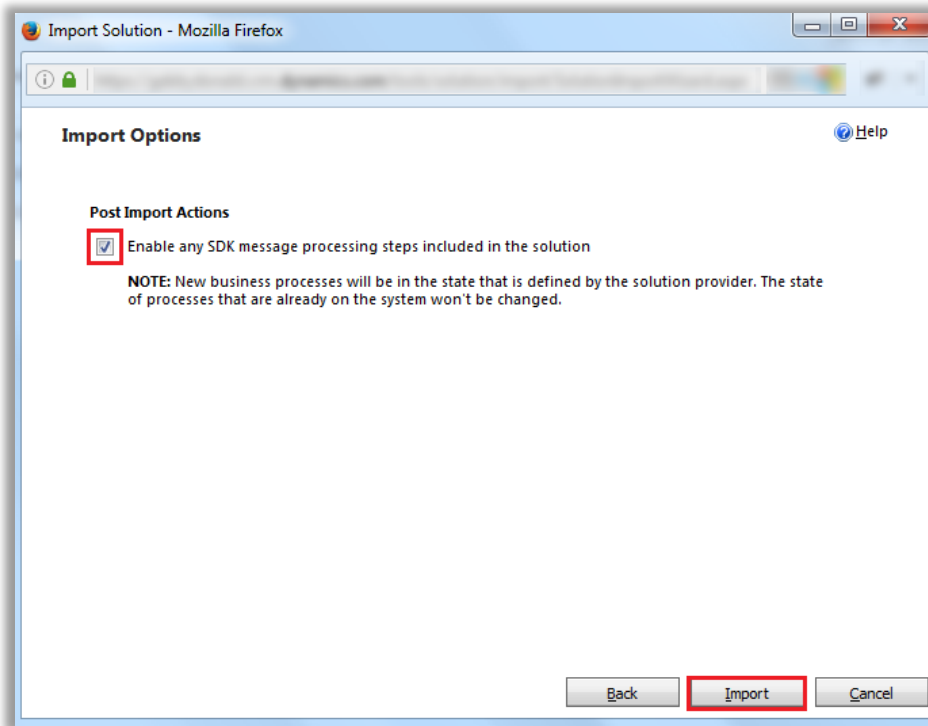
- Click on '**Choose File** button and choose the 'Package Zip' File for **Smart Alerts** from the Import Solution Window.



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

USER MANUAL: Dynamics CRM Smart Alerts

- After clicking on the 'Next' button, the Import Options window will appear.
- 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.

Name	Display Name	Version	Installed On	Package T...	Publisher
Calendar365	Calendar 365	5.2.0.0	2020/03/30	Managed	AppJetty
SmartAlerts	Smart Alerts	3.1.0.0	2020/03/27	Managed	AppJetty

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

License Activation

- 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.

Information

Information
Configuration
Components
 Entities
 Option Sets
 Client Extensions
 Web Resources
 Processes
 Plug-in Assemblies
 Sdk Message Processin...
 Service Endpoints
 Dashboards
 Reports
 Connection Roles
 Article Templates
 Contract Templates
 Email Templates
 Mail Merge Templates
 Security Roles

appjetty

Expire On: ... Status: Unregistered

Profile

Activate Your Free Trial

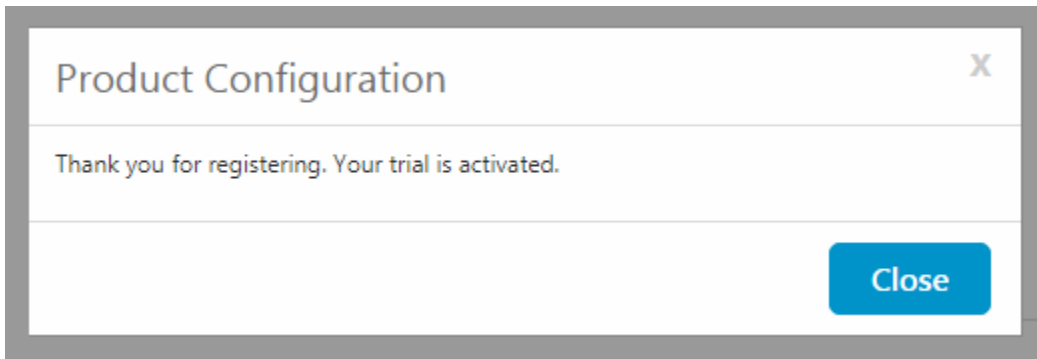
First Name* Last Name*

Email*

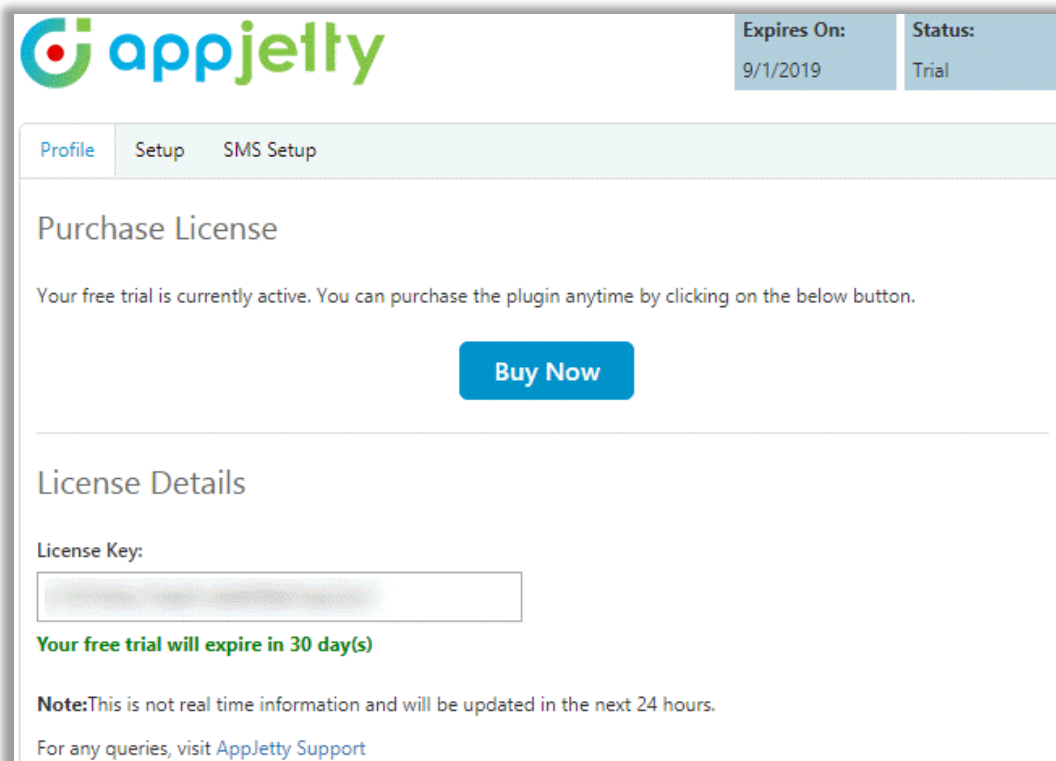
For any queries, visit [AppJetty Support](#)

Activate

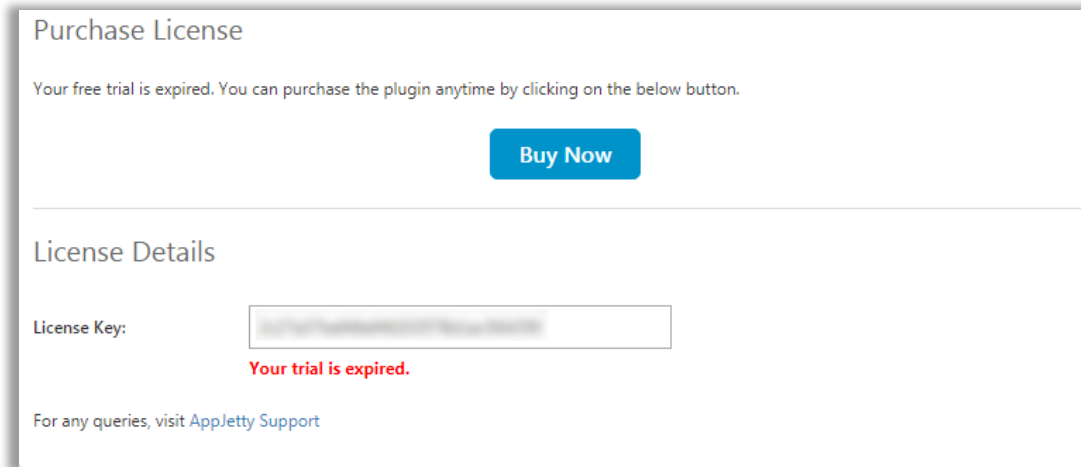
- You can activate your **one-month free trial**.
- To get a one-month free trial license key, fill out the details and click on ‘**Activate**’ button.



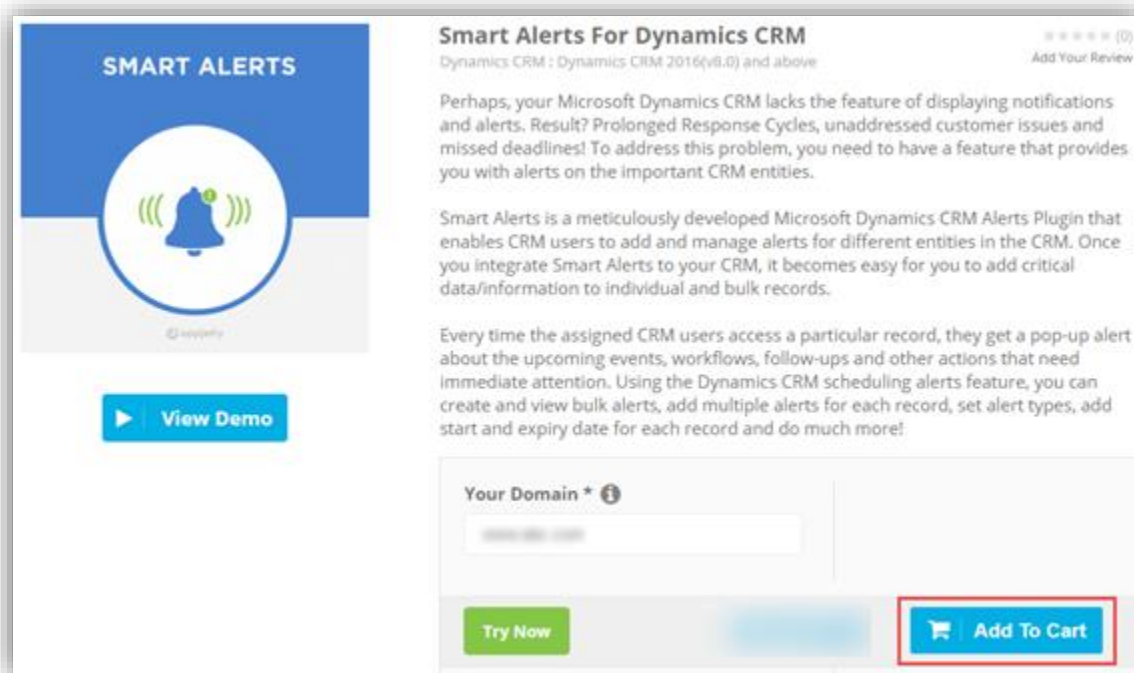
- Your trial will get activated and expiry date will be displayed on top.



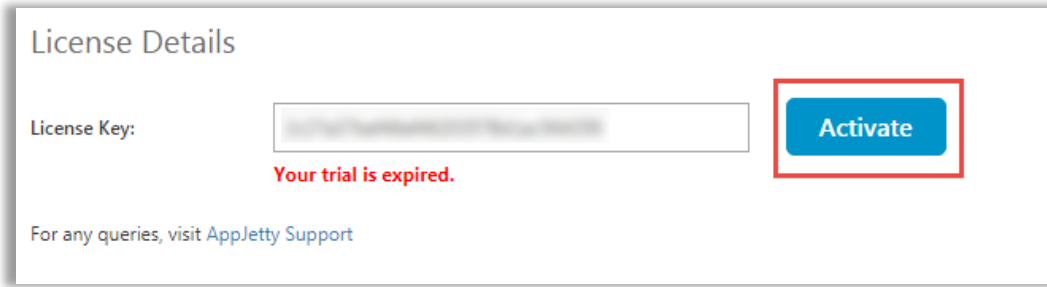
- You can purchase the licensed version any time. To purchase the license, click on 'Buy Now' button.



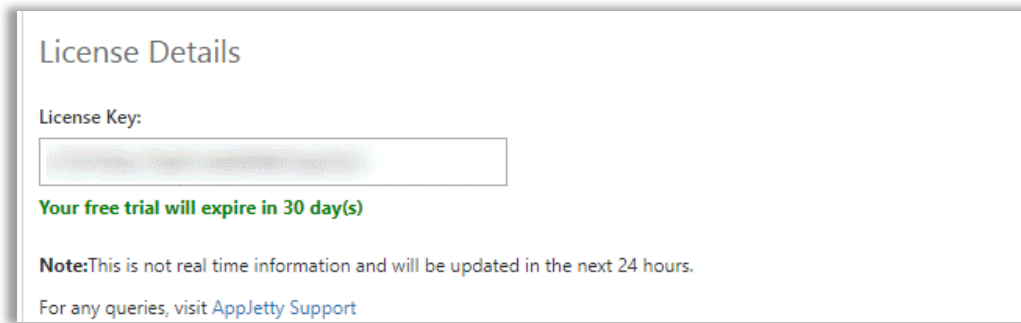
- On expiration of Trial, a message will appear that the trial has expired. Now to purchase the license click on 'Buy Now' button.
- This will redirect you to our product page and a pop-up will appear. Click on 'Add to Cart' button and complete the purchase process.



- 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 and **'SMS 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"** icon.

The screenshot shows the 'SMS Setup' configuration window in Dynamics CRM. It is divided into two main sections: 'All Entities' and 'Selected Entities'. The 'All Entities' list on the left contains various CRM entities, with 'Campaign' currently selected. The 'Selected Entities' list on the right contains 'Account', 'Case', and 'Contact'. Below these lists are three checked checkboxes: 'Enable Cascading Alert', 'Enable Track Alert', and 'Enable Error Logs'. At the bottom of the window are two buttons: 'Save' and 'Configure Languages'.

- Along with entity selection, manage settings for cascading alerts and tracking of alerts.
- Checking Enable Cascading Alert checkbox will enable cascading feature in smart alerts.
- Checking Enable Track Alert checkbox will enable track alerts feature in smart alerts.
- Checking Error Logs tracking checkbox will enable error log tracking in smart alerts.
- Click on **“Save”** button to save or update selected entities.
- Click on **“Configure languages”** button, to configure Smart Alert in any CRM supported language you want.

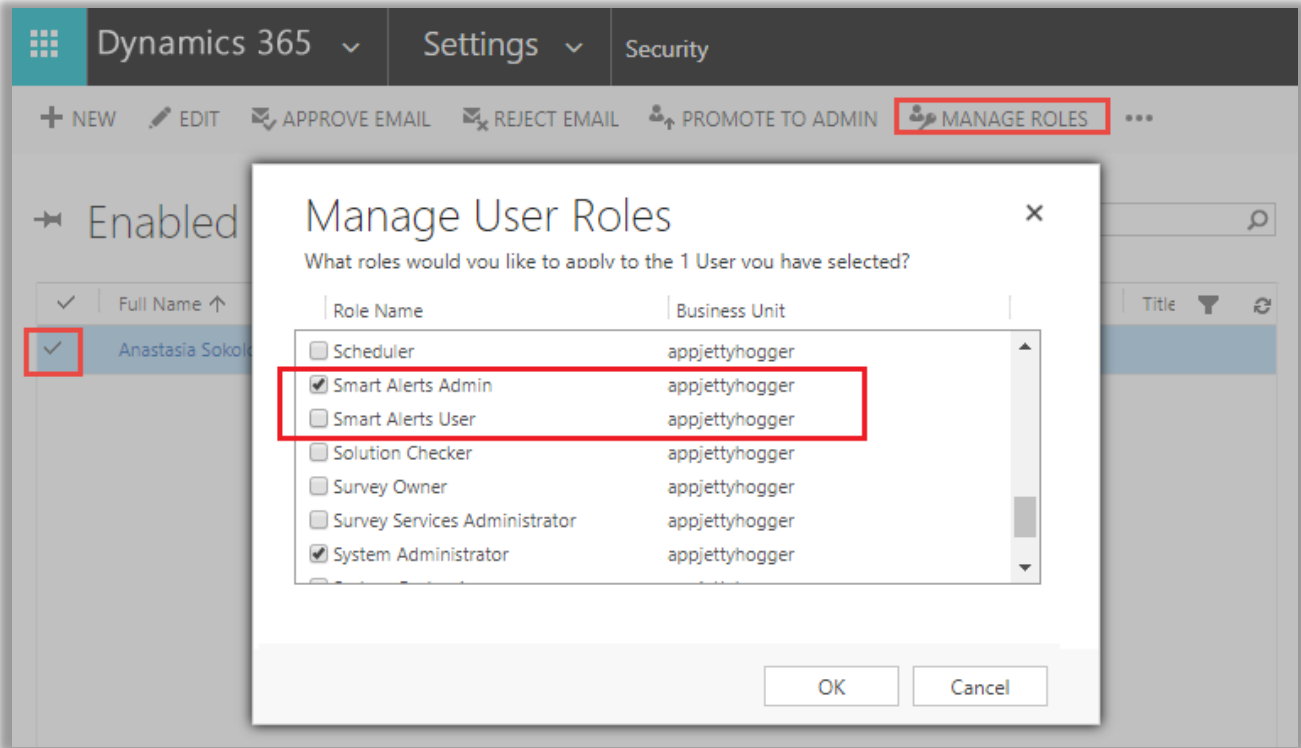
Text	Value
Add Bulk Alerts	<input type="text"/>
Name	<input type="text"/>
Description	<input type="text"/>
Start Date	<input type="text"/>

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

- To manage the default SMS configuration settings, click on **'SMS Setup'** tab.
- Clicking on SMS Setup page, configure default Twilio API details, which you can directly use if you are already a registered user of Twilio.
- Check the checkbox to enable SMS alert.
- Upon enabling, enter your Twilio application Sid.
- Along with that enter Authentication token and "From" number, from which you want SMSs to be sent to your other users.
- Click on Save to configure this one-time SMS Setup.

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.



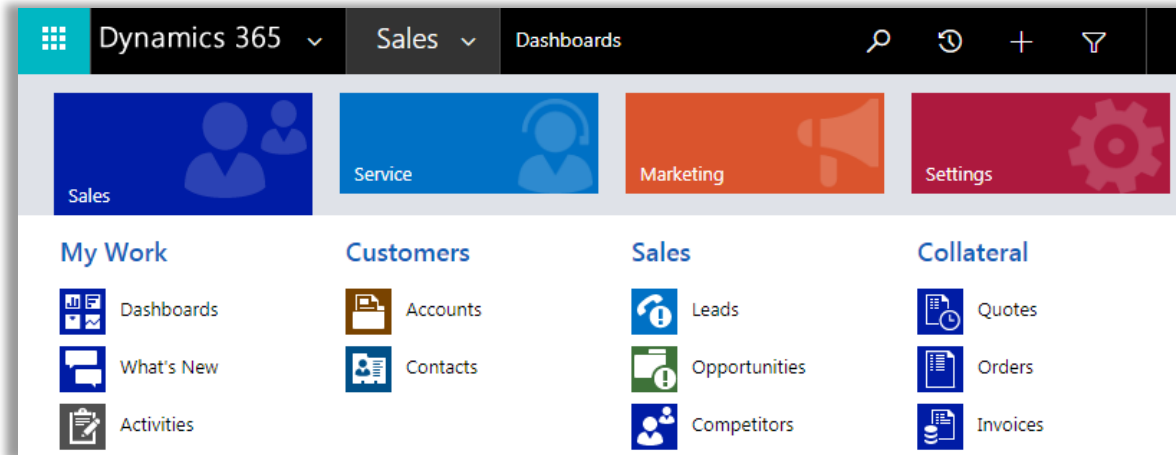
- You can set the following roles for a **Smart Alert Users**:
 - **Smart Alert Admin**: CRM Admin User will be able to create, view, edit and delete alerts.
 - **Smart Alert User**: CRM User will be able to create, view and edit alerts. They will not be able to delete alerts.

Procedure

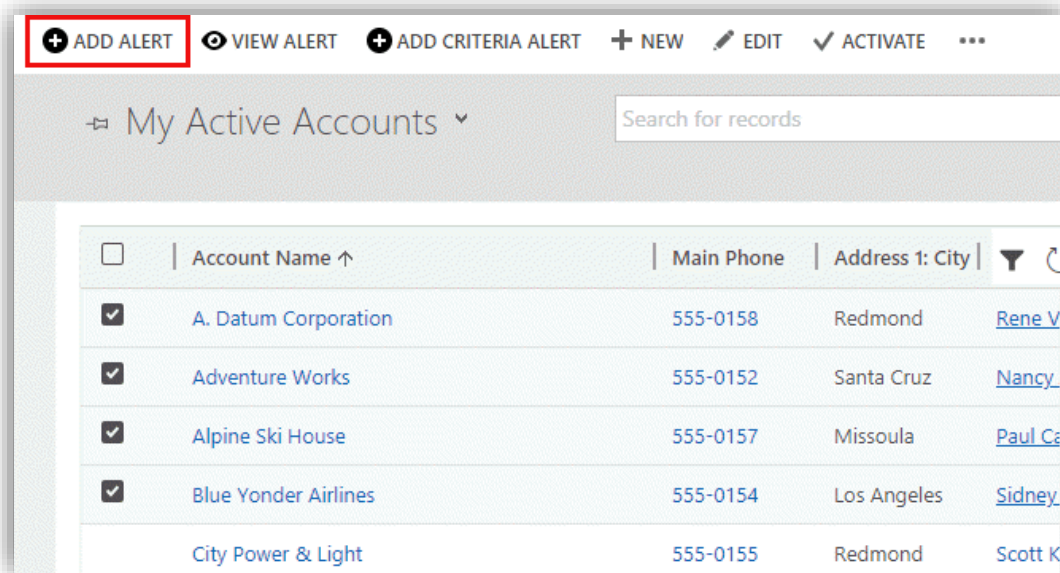
Bulk Alert

Add Bulk Alert

- Navigate to any entity for which you want to set alerts. For example, if you want to set alerts for Accounts, go to **Sales -> Accounts**.




- 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.


USER MANUAL: Dynamics CRM Smart Alerts


- **Description:** It will contain the brief description of alert.
- **Start Date:** It will hold the date from which the alert will be active.

Note: You can set the 'Date format' from the Personal Options of the Dynamics. By clicking on the **Settings**  icons from the main header, the **Set Personal Option** window will appear. Click on **Formats** → **Customize** → Date. Based on the selection there, the date formats will be displayed for your notifications.


Add Bulk Alerts

Name*


Description* 

Start Date* 




Expires

Expiry Date 

Alert as Popup Form notification Global notification


Include Users 

Alert Type

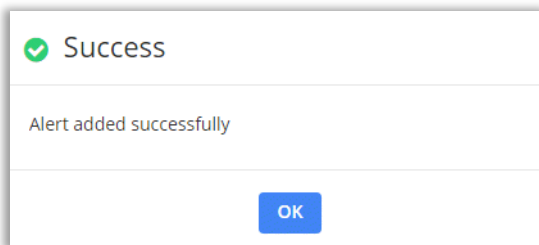
 Information  Warning  Critical

Enable Cascading

- **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.

- **Alerts As:** Select the option of how you would like to view alert:
 - **Popup:** By checking the popup checkbox, you will get the popup slider from the right side when particular record is opened.
 - **Form Notification:** By checking this checkbox, you will get the notification under the name of records.
 - **Global Notification:** By clicking this checkbox, you will get the notification from  icon on the right side of the header menu.
- **Include Users:** Select all those users, whom you want should be alerted of that particular activity. Once selected, only selected users will receive notifications as per the selection of Alert: Popup Alert/Form Notification/Global Notification.
- **Alert Type:** It will set the alert type as **Information, Warning, or Critical.**
- **Enable Cascading:** 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.

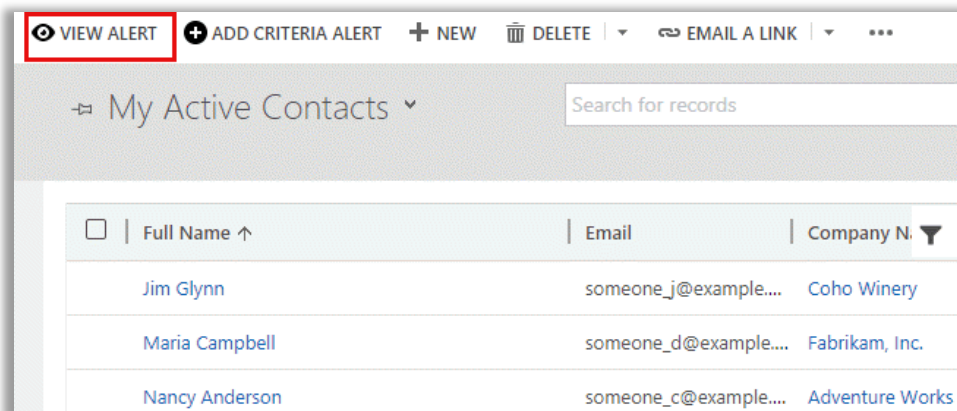
Note: Cascading can only be set for listed entities: **Account, Contact, Case, Lead, Opportunity, Quote, Order and Invoice** modules.



- 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.**



USER MANUAL: Dynamics CRM Smart Alerts

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

View Bulk Alerts

Alerts: All Alerts Filter Option Search:

Name	Description	Start Date	Expiry Date	Status	Alert Type
Email Address Updated	Email Address Updated for 3 Contacts	3/30/2020	3/30/2020	Active	Information
Created On		3/27/2020 11:44 AM			
Created By		Smart Tech			
Action					
Mobile Number Added	Business Phone Added For Contacts	3/30/2020	3/30/2020	Active	Information
New Case Created	Case: Created by Smart Tech	4/10/2020	4/10/2020	Active	Information

Showing 1 to 3 of 3 entries 1

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

Alert Type Information

Created On 3/27/2020 11:44 AM

Created By Smart Tech

Action

- For alerts created, you can **edit** and **delete** them by clicking on action icons as required.

Edit Bulk Alert

- In edit view, you can edit all the information as required and click on Update button to complete the changes.

Types

Information Warning Critical

Enable Cascading

Update **Cancel**

Search:

Entity	Account Name	Action
Account	Jenifer	
Account	Kabir	

Showing 1 to 2 of 2 entries

1

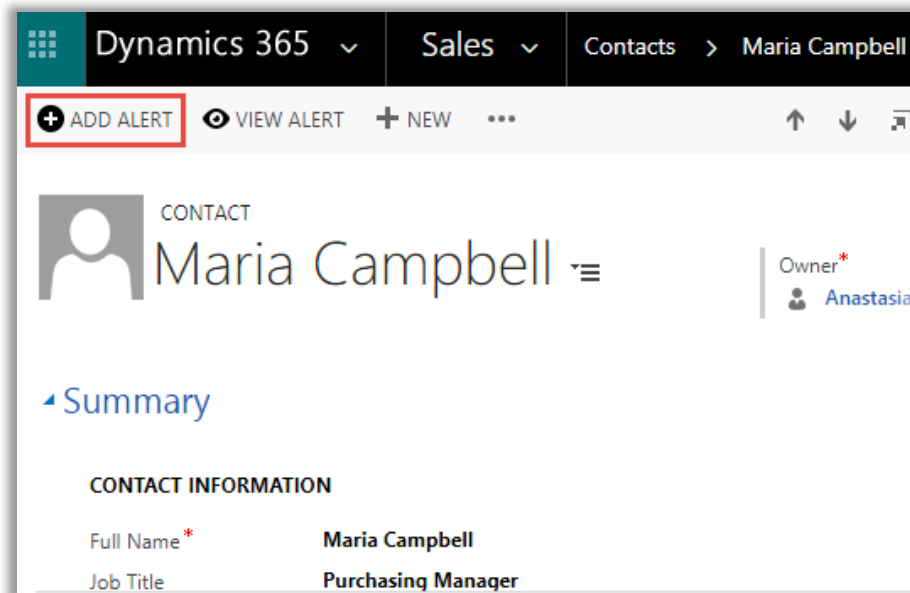
- On edit bulk alert, you can also view particular record for which that particular alert is created.

Note: Only user with 'Smart Alerts Admin' or 'System Administrator Role' will be able to delete an alert.


Alert for Entity

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.
- **Alerts As:** Select the option of how you would like to view alert:
 - **Popup:** By checking this checkbox, you will get the popup slider from the right side when particular record is opened.
 - **Form Notification:** By checking this checkbox, you will get the notification under the name of records.
 - **Global Notification:** By clicking this checkbox, you will get the notification from  icon on the right side of the header menu.


USER MANUAL: Dynamics CRM Smart Alerts

- **Include Users:** Select all those users, whom you want should be alerted of that particular activity. Once selected, only selected users will receive notifications as per the selection of Alert: Popup Alert/Form Notification/Global Notification.
- **Alert Type:** It will set the alert type as **Information**, **Warning**, or **Critical**.


Add Bulk Alerts

Name*


Description* 

Start Date* 




Expires

Expiry Date 

Alert as Popup Form notification Global notification

Include Users 

Alert Type

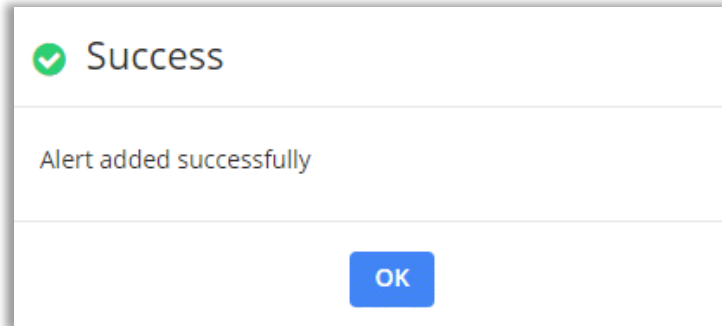
 Information  Warning  Critical

Enable Cascading

- **Enable Cascading:** 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.

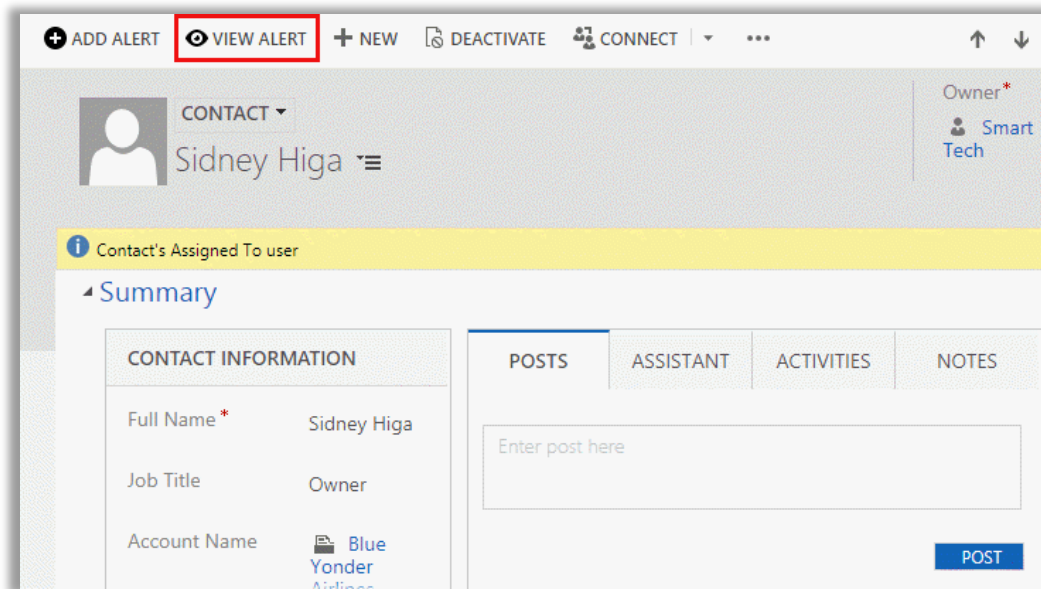
- Once you fill the details, click on **“Save”** button.



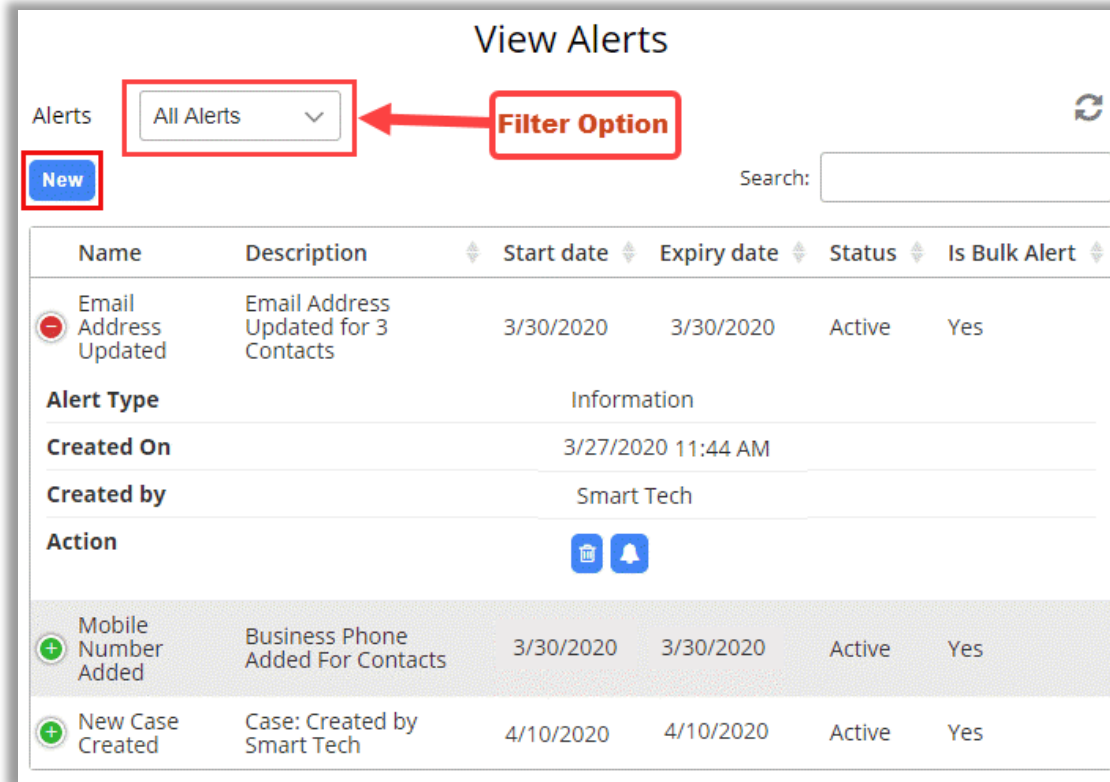
- It will display success/failure message.

View Alert

- Navigate to detail view of that particular record.



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

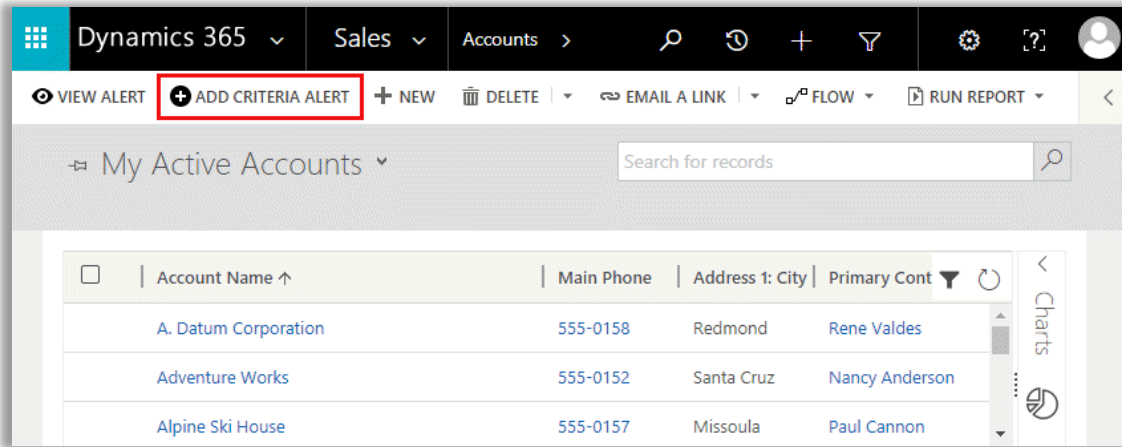


- You can add new alert from view page by clicking on “**New**” button.
- The list will also have option to filter alerts. Filter option are as below:
 - **All Alerts** - It will list all alerts.
 - **Active Alerts** - It will list active alerts and you can “**Deactivate**” active alerts.
 - **Inactive Alerts** - It will list inactive alerts and you can “**Activate**” inactive alerts.
 - **Expired Alerts** - It will list expired alerts.
 - **Pop-up Alerts** – It will list all pop-up alerts.
- For alerts shows, you can edit, delete as well as track alerts.
- **Note:** Alert under the Entity can only be edited and viewed from bulk alert list.

Criteria Alert

Add Criterial Alert

- Navigate to any entity for which you want to set criteria alerts. For example, if you want to set alerts for accounts, go to **Sales -> Accounts**.



- Click on **“Add Criteria Alert”** button, this will open a new window for creating criteria alert, applicable for all records as mentioned in the query.

USER MANUAL: Dynamics CRM Smart Alerts

- **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 needs to add FetchXML Query file.
- **Description:** Add the description of the alert that you wish to view.

Add Criteria Alert

Name *

Entity

FetchXML*

Description*

Notification Type Email SMS

Include Users

Alert Type

Information Warning Critical

- **Notification Type:** For critical alert by default form notification is shown upon accessing a particular record. Other than that, you can select Email and SMS as the notification form. SMS option will be shown only when SMS set up has been done.
- **Include Users:** You can select users to whom alert should be shown.
- **Alert Type:** 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**.

Name	Entity	Alert Type	Description	Created On
Active Contact	Contact	Information	Contact's Assigned To user	3/27/2020 11:46 AM

Created By Smart Tech

Action

Showing 1 to 1 of 1 entries 1

- Clicking on **'View Alerts'**, user will also be able to view criteria alerts created for the particular entity.
- For each criteria alert, there are different action buttons like **View**, **Edit** and **Delete**.

View Criteria Alert

Name:

Entity:

FetchXML:

```
<fetch version="1.0" output-format="xml-platform"
mapping="logical" distinct="false">
<entity name="contact">
<attribute name="fullname" />
<attribute name="parentcustomerid" />
<attribute name="telephone1" />
</entity>
</fetch>
```

Description:

Notification Type: Email SMS

Include Users: Smart Tech

Alert Type: Information Warning Critical

Search:

Full Name	Company Name	Business Phone	Email
Jim Glynn	-	555-0109	someone_j@example.com
Maria Campbell	-	555-0103	someone_d@example.com
Nancy Anderson	-	555-0102	someone_c@example.com
Patrick Sands	-	555-0110	someone_k@example.com

- Clicking on **View**, you also get to know with which records criteria alert is associated to.
- If you have **checked** the **email** option at the time of adding criteria alert, on fulfilling the alert condition, you will get an email.

USER MANUAL: Dynamics CRM Smart Alerts

- If you click on any record, it will open the detail page of that record and the **criteria alert messages** will be displayed as “Form notification” near the name of the record.

The screenshot displays the Dynamics CRM interface for an account named "A. Datum Corporation". At the top, there are navigation buttons: "ADD ALERT", "VIEW ALERT", "NEW", "DEACTIVATE", and "CONNECT". The account header shows "ACCOUNT" with a dropdown arrow, "A. Datum Corporation", and summary statistics: "Annual Re..." with a value of "\$10,000.00", "Number of..." with a value of "6,200", and "Owner*" as "Smart Tech".

A yellow banner highlights three smart alerts, each with an information icon (i) and a red box around them:

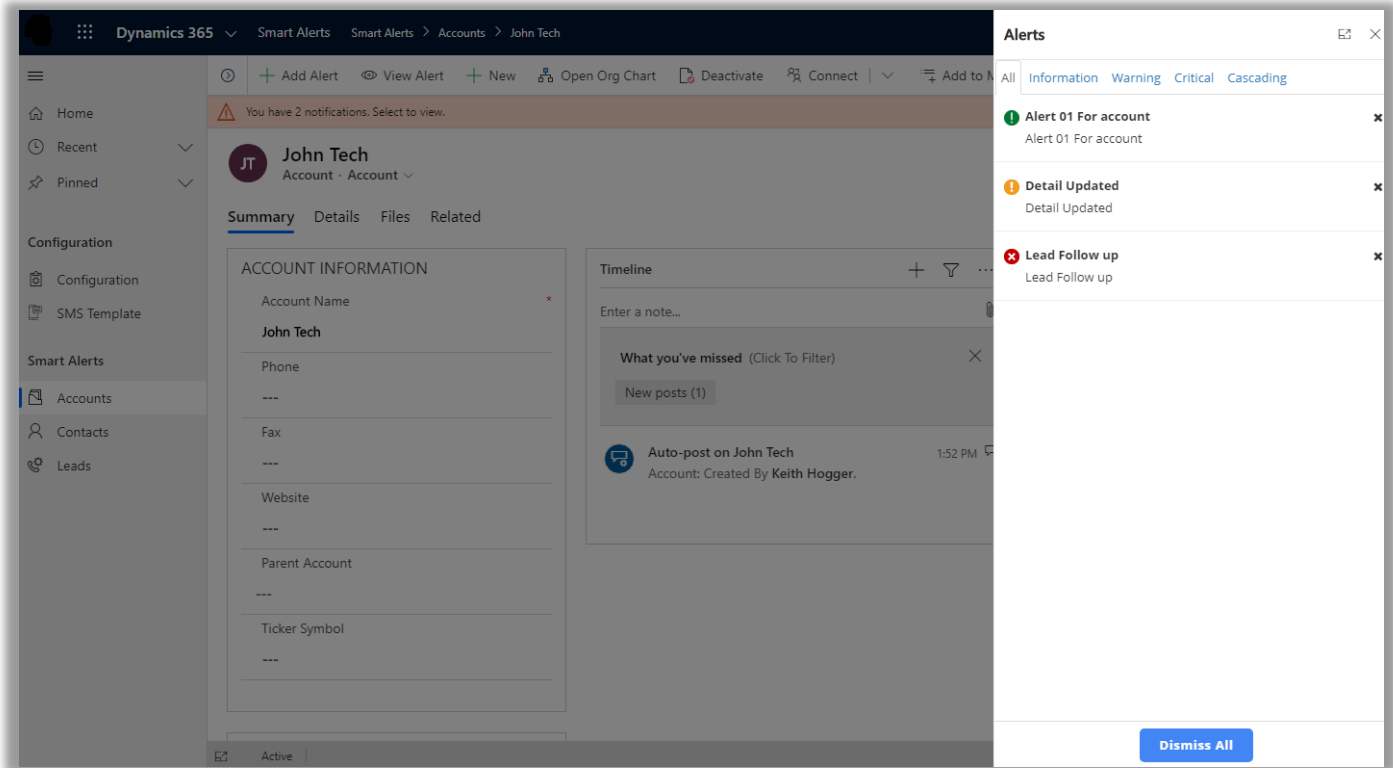
- Check Order Status for Accounts
- Take Urgent Follow Up
- Accounts With Email

Below the alerts is a "Summary" section with a dropdown arrow. It is divided into two main areas:

- ACCOUNT INFORMATION:** A table with fields: Account Name* (A. Datum Corporation), Phone (555-0158), Fax (-----), Website (http://www.ac), and Parent Account (-----).
- POSTS:** A section with tabs for "POSTS", "ASSISTANT", "ACTIVITIES", and "NOTES". It contains a text input field "Enter post here" and a "POST" button. Below the input are filters for "All posts", "Auto posts", and "User posts". A post is visible with a phone icon and the text: "Operating manual required Case: Created by Smart Tech for Account A. Datum Corporation (sample)."

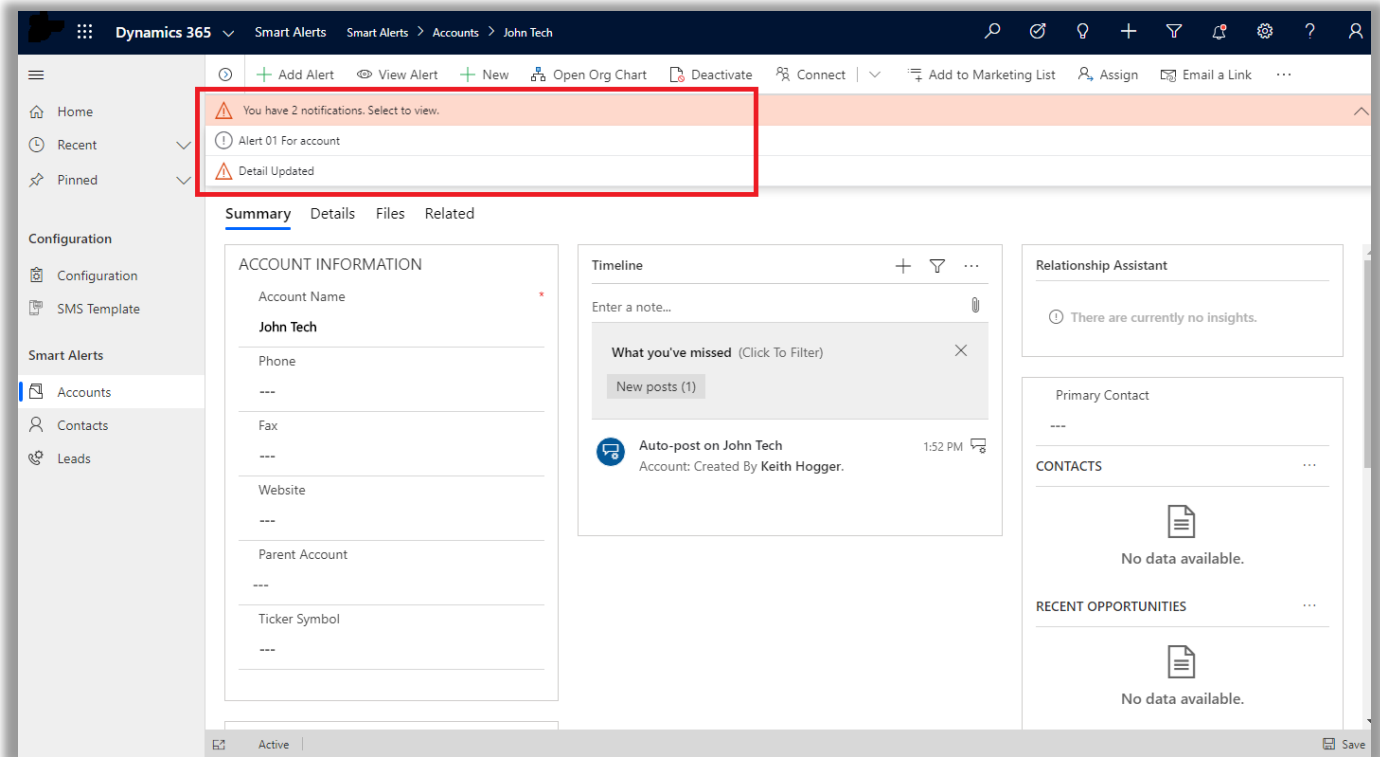
Popup Alerts (Record Popup Alerts)

- If you click on any record, it will open the detail page of that record and **popup alert** message will be displayed sliding from the right which can be collapsed and expanded as required
- In the pop up, alerts are bifurcated based on alert type like **Information, Warning, Critical, Cascading**. Also, it has All section that lists out all the alerts.



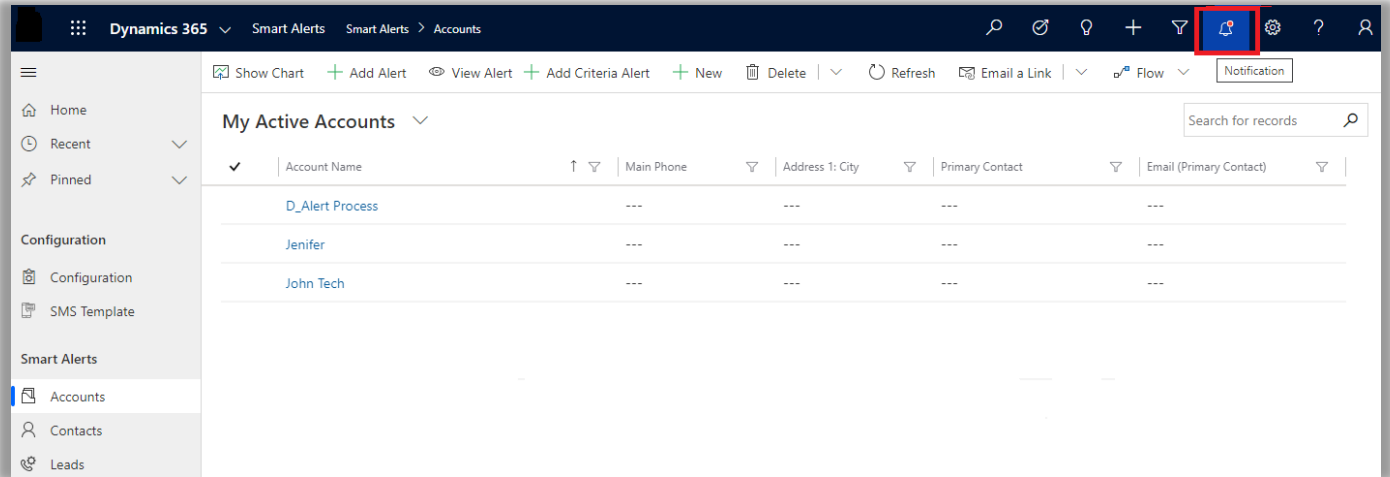
Form Notification


- If you click on any record, it will open the detail page of that record and the **Form Notification** will be displayed above the name of the Record.
- Here by clicking on **Select to View**, the list of the notification will be expanded.

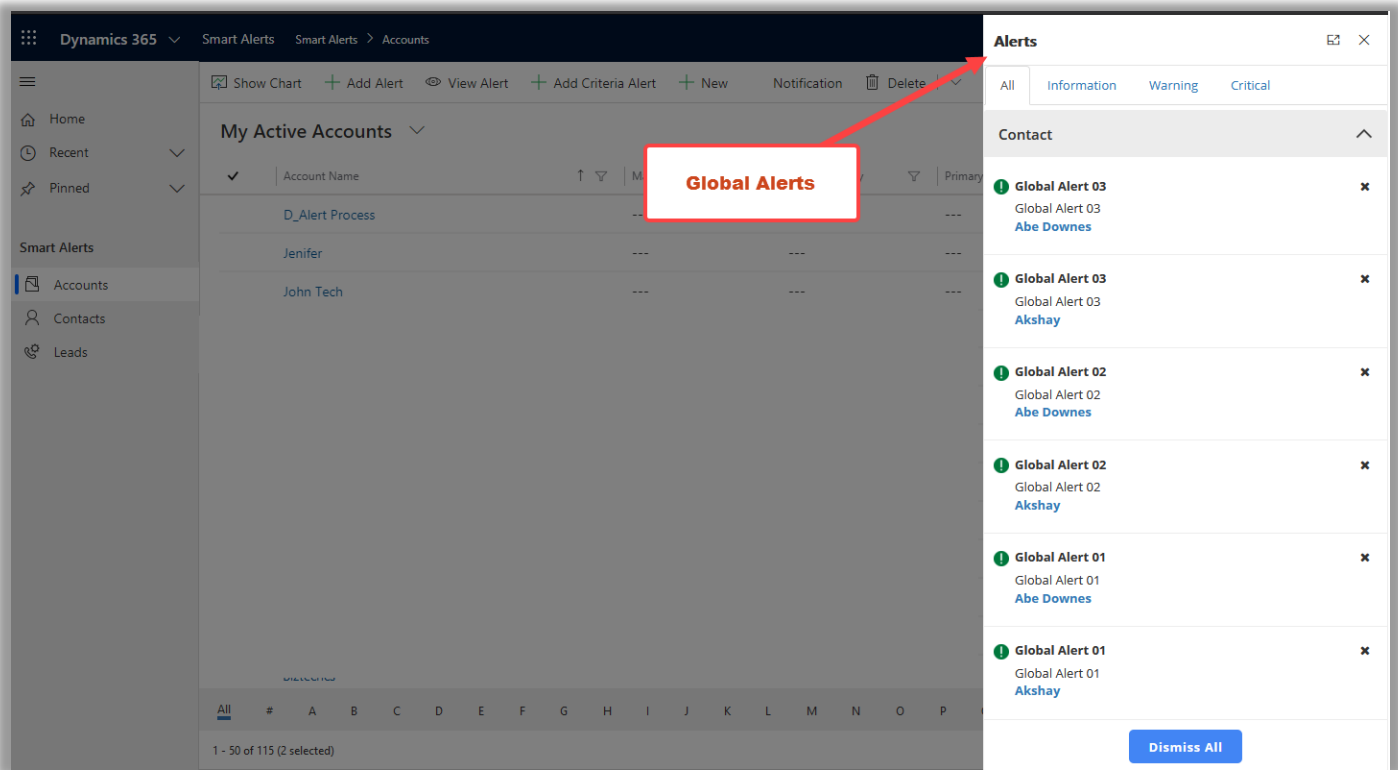


Global Notification

- Global Notification will display to the selected users while creating alerts.
- When the user gets the new notification, it will be displayed with the red dot on the notification icon.

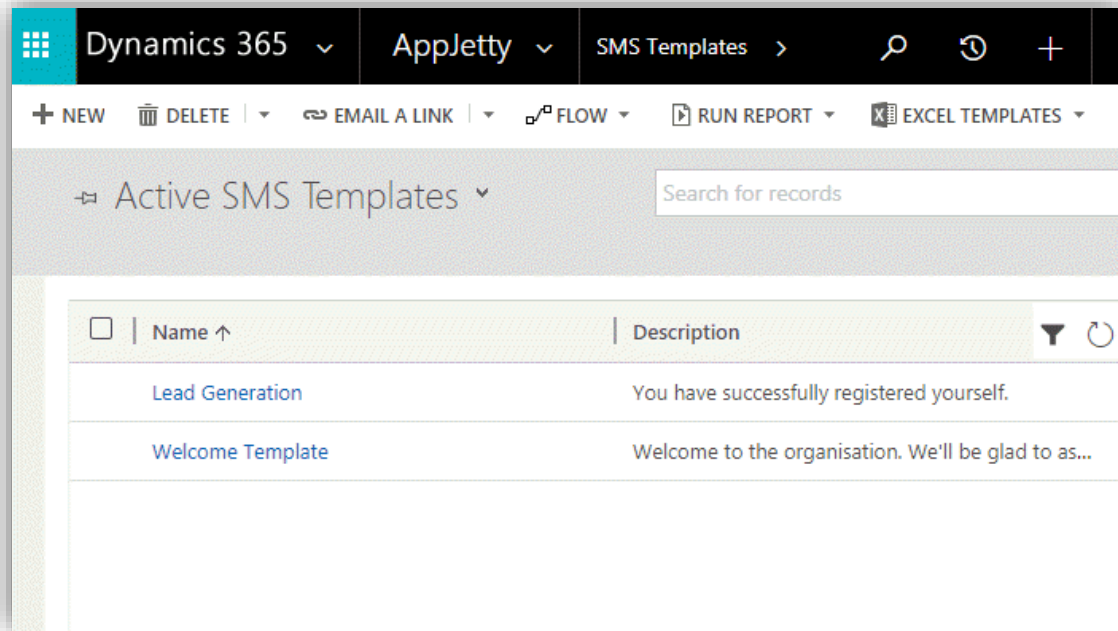


- By clicking on notification  icon, the slider will be displayed from the right side including all the notification under the heading **Alerts**.



SMS Alert

- SMS Alerts are sent for **criteria alerts** as well as **process-based SMSs**. Criteria SMS alert will be sent only when records matching those criteria have phone numbers associated with them.
- For all SMS alerts created or sent, you can view them under **Activities** -> **All SMS Messages**.
- For adding SMS description, you can also choose pre-defined description in form of templates. These SMS templates are available within **AppJetty** > **SMS Templates**.



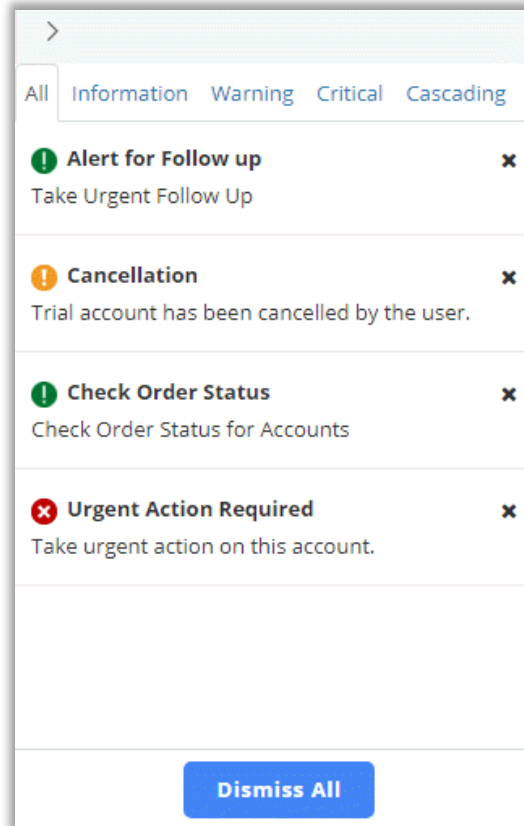
- On navigating to SMS templates, you can view the list of all created templates. You can create as many templates as you want by clicking on New button.

Note: SMS templates option will be available only when SMS setup is done.

Track Alerts

- From the pop up, user gets option to dismiss alert. Any alert once dismissed will get removed as pop up notification which means it won't be available on again opening the record in the pop up.
- To dismiss an alert, you may just click on the cross icon available with every alert and to dismiss all alert at once just click on Dismiss All button.

Note: Alerts that are not dismissed, are marked as read under alert track status.



- Admin user can view the status of the record i.e. If it is read or dismissed from the detail view of the particular record.
- Navigate to detail view of the record, click on View Alert option. Click on bell icon available with each alert record.

View Alerts

Alerts All Alerts ↕ ↻

New Search:

Name	Description	Start date	Expiry date	Status
Alert for Follow up	Take Urgent Follow Up	2019-08-02	-	Active
Is Bulk Alert		Yes		
Alert Type		Information		
Created On		8/2/2019 2:56 PM		
Created by		Smart Tech		
Action				

- Clicking on the icon, track alerts screen shows up that status of particular alert. You can further filter results based on users or track status as required.

Track Alerts

Track Type: All ↕ All Read Dismiss

Users: Smart Tech ↕

Search:

User	Read/Dismiss date	Status
Smart Tech	8/3/2019 11:13 AM	Read
Smart Tech	8/5/2019 10:49 AM	Dismiss

Showing 1 to 2 of 2 entries

1

Send SMS via process

- To send SMS using workflow, you need to follow default “CRM flow” for creating workflows.
- Navigate to **Settings → Processes**.
- Select New to create a new process. Enter valid process name, entity for which the process is being created and select Workflow as the Category.

Create Process

Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.

Process name: *

Category: * Entity: *

Run this workflow in the background (recommended)

Type: New blank process New process from an existing template (select from list):

Template Name ↑	Primary Entity	Own
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Properties

OK Cancel

- Click on **OK** to proceed further.
- Here you may select the action as required for workflow to work.
- For SMS to be sent, you need to create a message record.

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

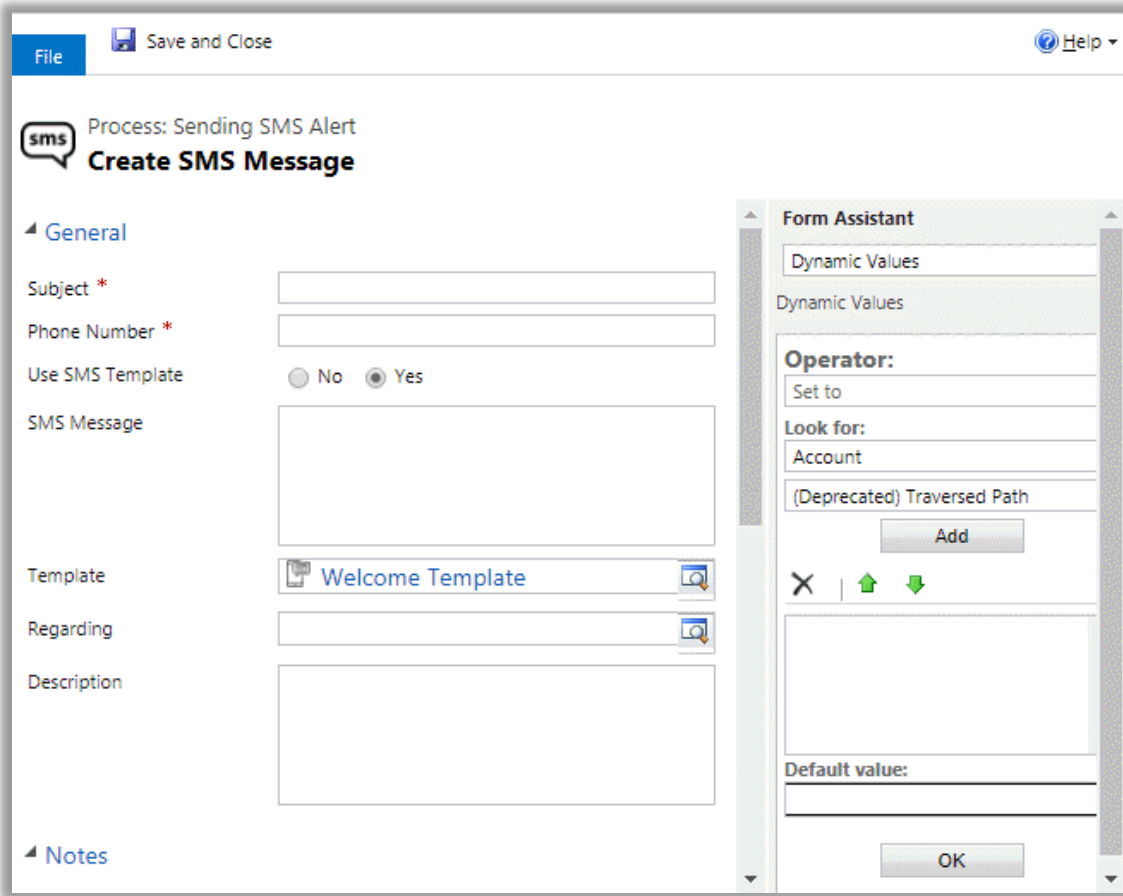
Record is deleted

Add Step ▼ | Insert ▼ | Delete this step.

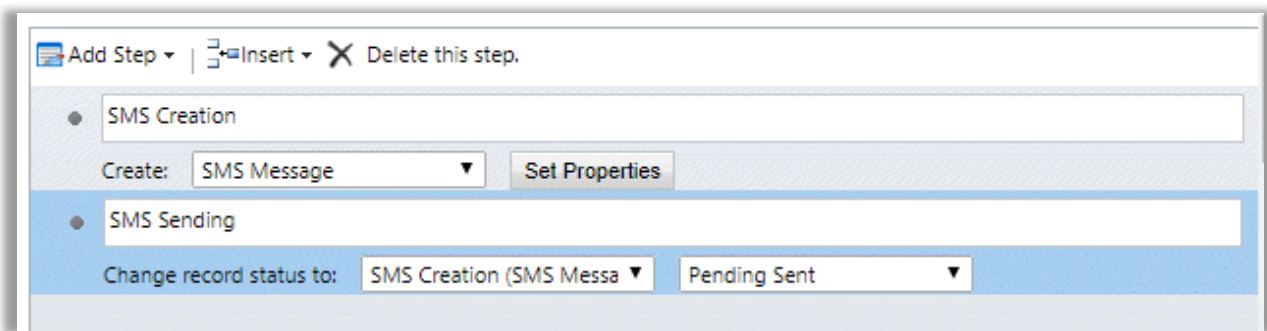
● SMS1

Create:

- For creating message record, you need to select SMS Message from the option and you need to set properties as required.
- Under set properties, you need to enter the phone number or fetch it from dynamic values.



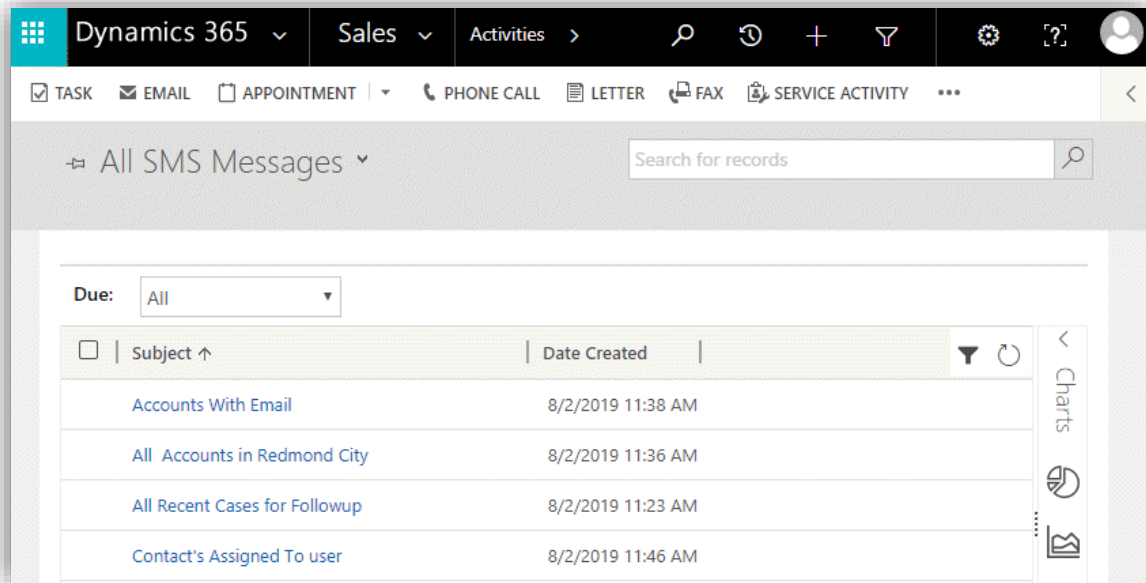
- You must also enter the SMS Message or select message based on SMS template. For SMS templates you can select template from the look up selection.
- This would just create SMS record, in order to send SMS message, another step needs to be created within the same workflow process that triggers sending of the SMS
- Add one more step and select option Change Status.



- On selecting **Change Status**, you need to select the entity for which status must be changed. Select SMS Message in first dropdown and select status Pending Sent in the second dropdown.

USER MANUAL: Dynamics CRM Smart Alerts

- Changing status of the SMS Message to Pending Sent will send the message.
- Once you are done with the configurations, you need to Save and Activate the process.
- All SMS created and sent from the CRM are easily accessible under Activities -> SMS



Send Alerts via process

- To send alerts using workflow, you need to follow default CRM flow for creating workflows.
- Navigate to **Settings** → **Processes**.
- Select New to create a new process. Enter valid process name, entity for which the process is being created and select Workflow as the Category.

Create Process
Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.

Process name: *

Category: * Entity: *

Run this workflow in the background (recommended)

Type: New blank process
 New process from an existing template (select from list):

Template Name ↑	Primary Entity	Owne
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Properties

OK Cancel

- Click on **OK** to proceed further.

USER MANUAL: Dynamics CRM Smart Alerts

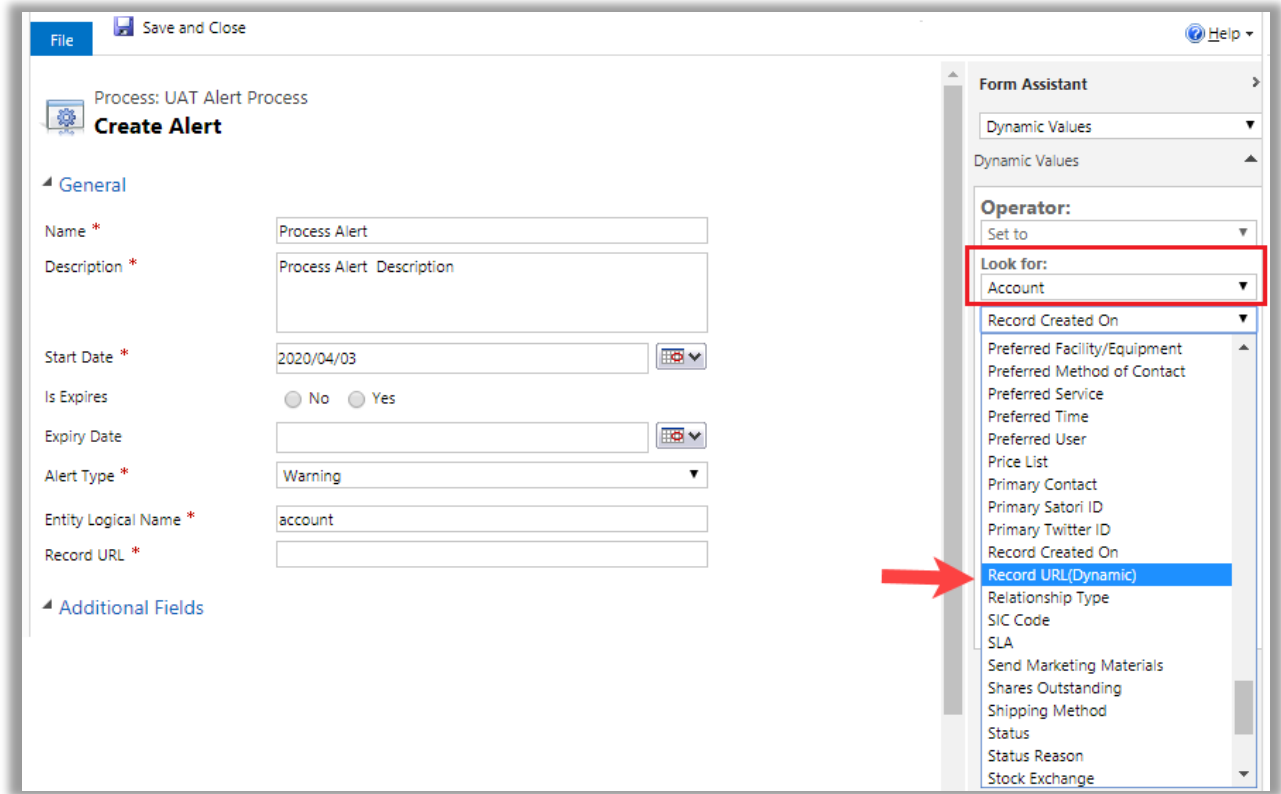
- Here you may select the action as required for workflow to work.
- For alert to be sent, you need to create an alert record.

The screenshot displays the 'Change Based Alert' configuration interface. The main area is divided into several sections:

- General:** Process Name: Change Based Alert; Entity: Case; Category: Workflow.
- Available to Run:** Run this workflow in the background (recommended) [unchecked]; As an on-demand process [unchecked]; As a child process [unchecked].
- Workflow Log Retention:** Keep logs for workflow jobs that encountered errors [checked].
- Options for Automatic Processes:** Scope: User; Start when: After; Record status changes [checked]; Record is assigned [unchecked]; Record fields change [unchecked]; Record is deleted [unchecked].
- Execute as:** The user who made changes to the record [selected].

At the bottom, there is a section for 'Alert For Record' with a 'Create' dropdown set to 'Alert' and a 'Set Properties' button highlighted with a red box.

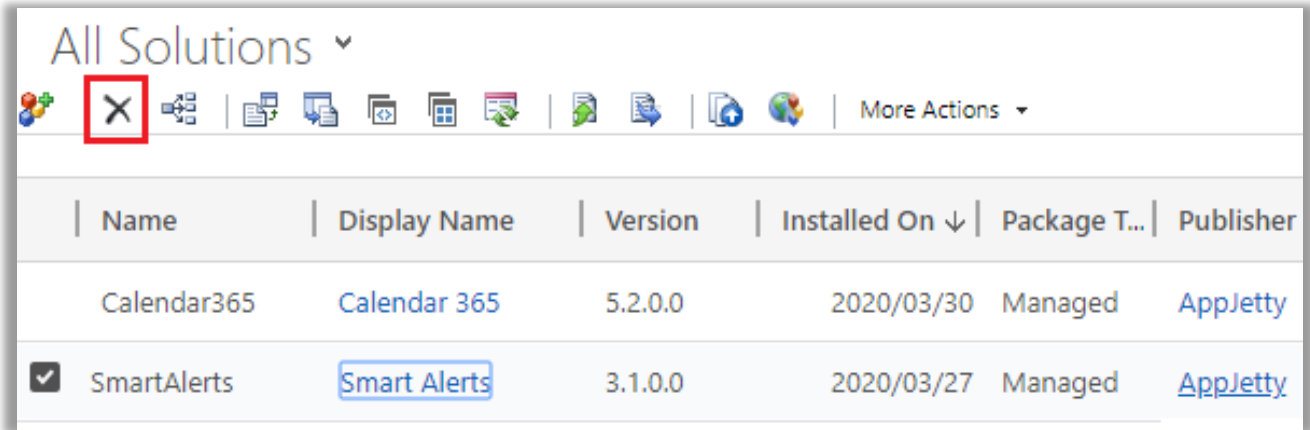
- For creating alert record, you need to select Alert from the option and you need to **Set Properties** as required.



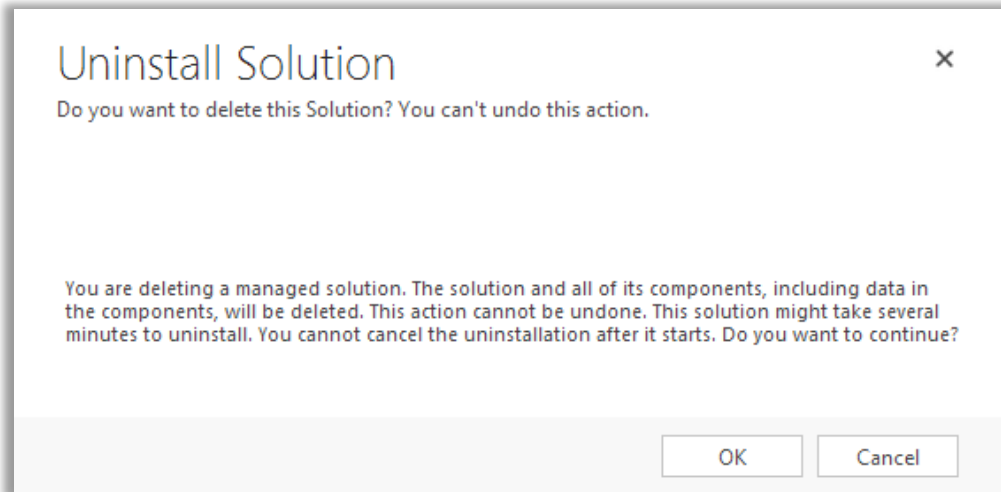
- Under set properties, you need to enter the relevant information or fetch it from dynamic values. Here using the logical name of entity is mandatory.
- Enter logical name of the entity, e.g. for case logical name is incident.
- Record URL: It's ID of CRM Record to open it. To add Record URL, select the **Account** under the **Operator** option and after selecting the "Account" select the **Record URL(Dynamic)** option under Account selection.
- Once you are done with the configurations, you need to **Save** and Activate the process.

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.



Contact Us

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