USER MANUAL

Smart Alerts

Version: 3.2

Compatibility:
Microsoft Dynamics 365 (Online)

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
- Add new custom alert level
- Reduce Response Cycles
- Alerts- General Announcement Alert (Global)
- Alert Dashboard: Track users wise alerts
- 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:

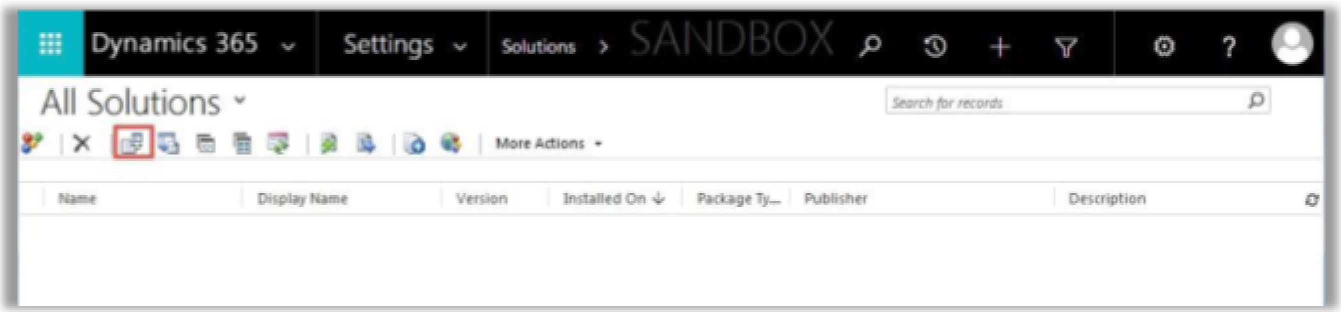
- You should be logged into Dynamics 365, Online or On-premises.

Installation & License Activation

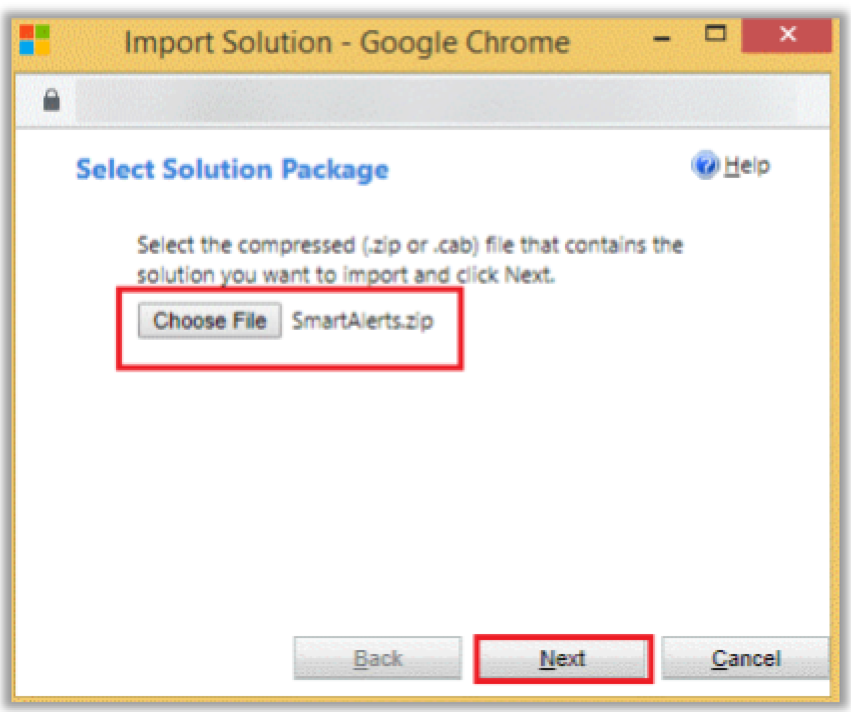
Installation Steps

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.

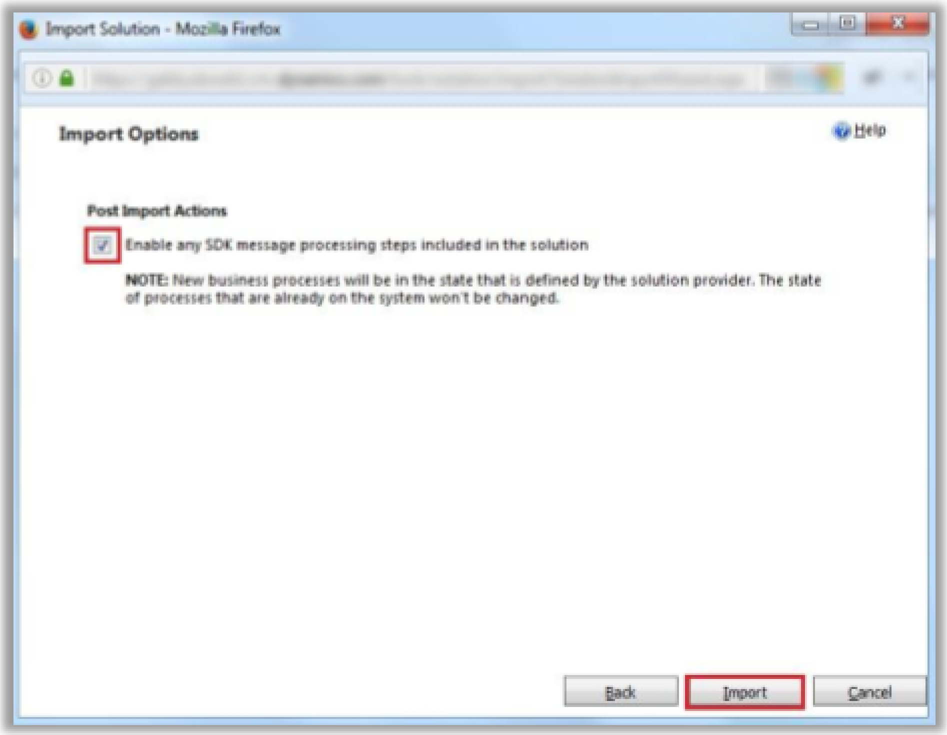


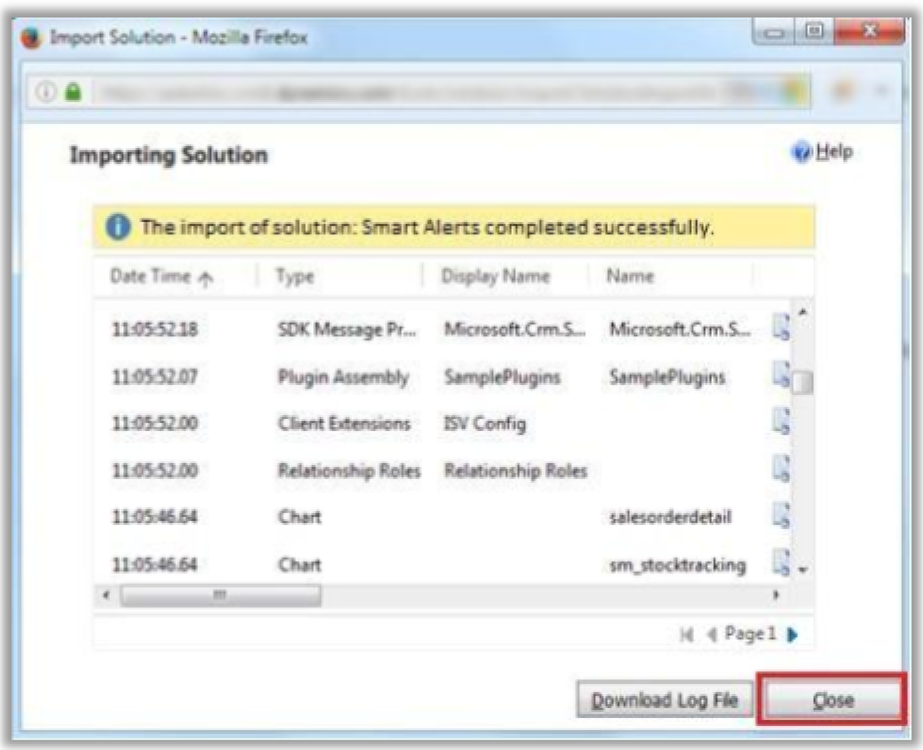
- Click on **'Choose File** button and choose the 'Package Zip' File for **Smart Alerts** from the Import Solution Window.



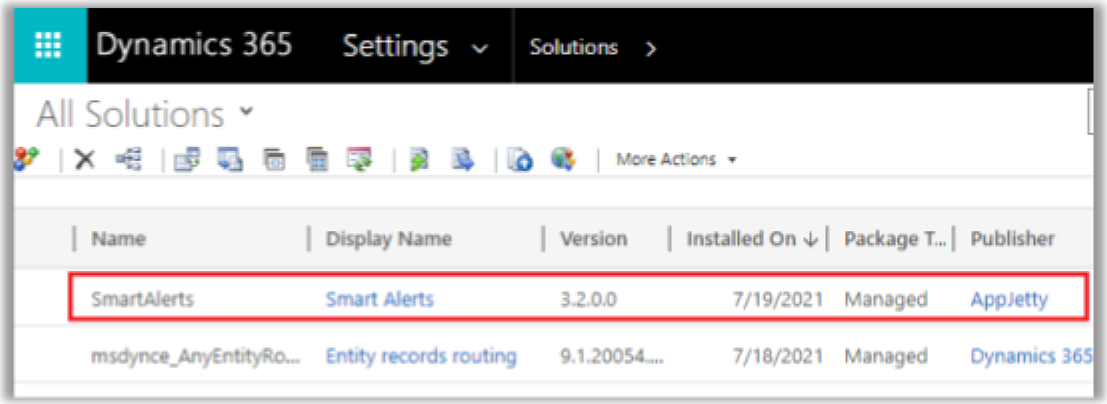
- Click on **'Next'** for further processing.
- After clicking on the 'Next' button, the Import Options window will appear.

- 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.

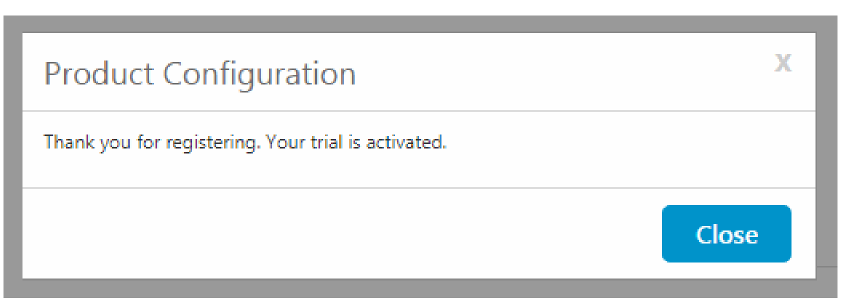


- Once you import the solution, it will be displayed in the solutions grid view.

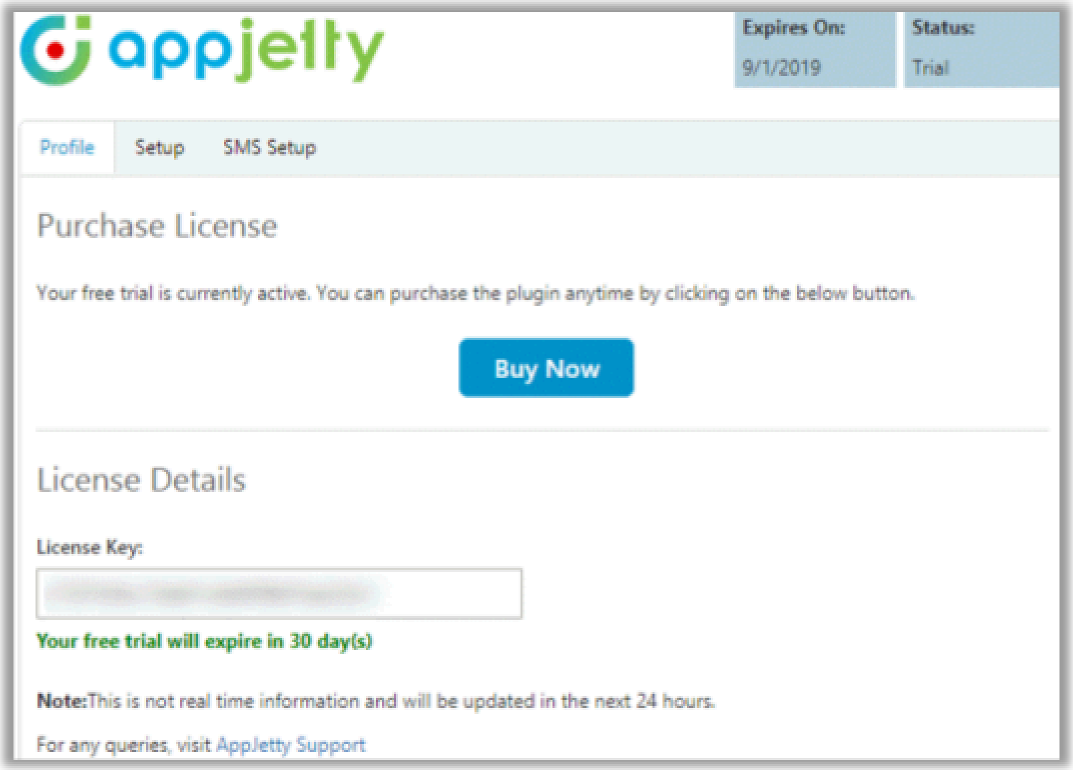
License Activation

- 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.

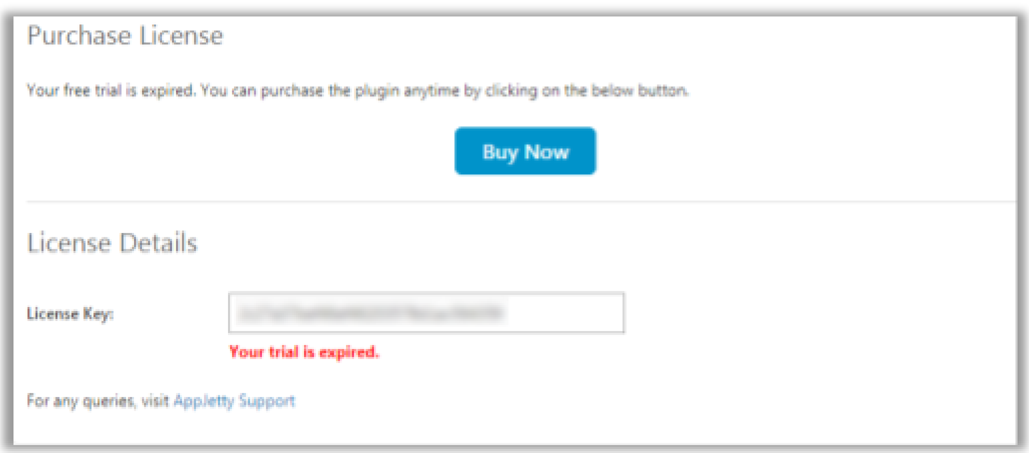
- You can activate your **free trial**.
- To get a free trial license key, fill out the details and click on **'Activate'** button.



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

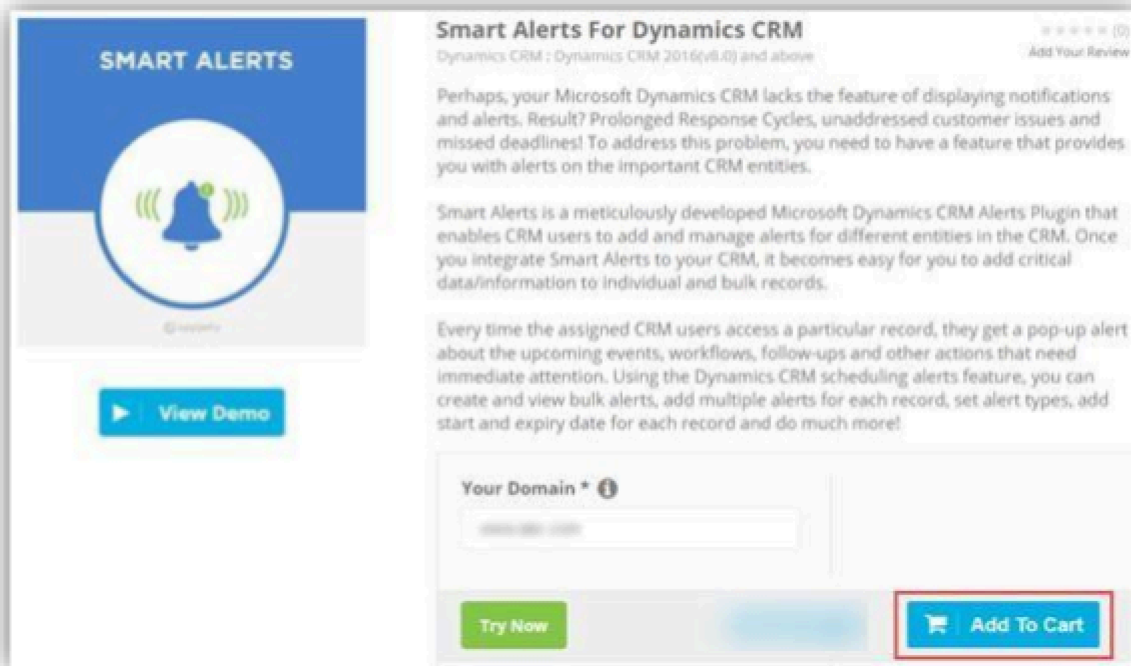


- You can purchase the licensed version any time. To purchase the license, click on **'Buy Now'** button.

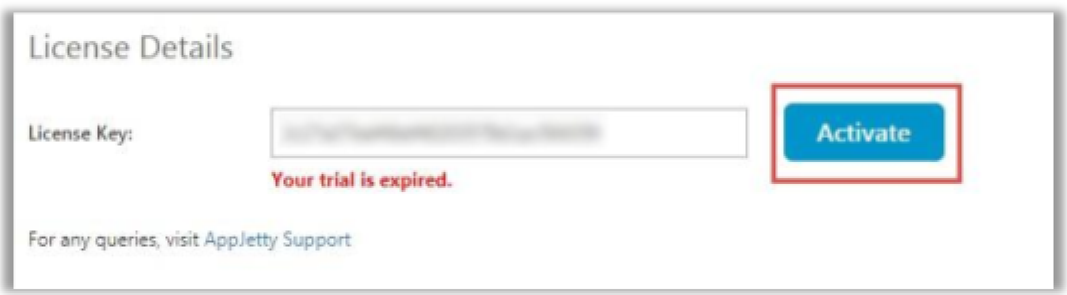


- On expiration of Trial, a message will appear that the trial has expired. Now to purchase the license click on **'Buy Now'** button.

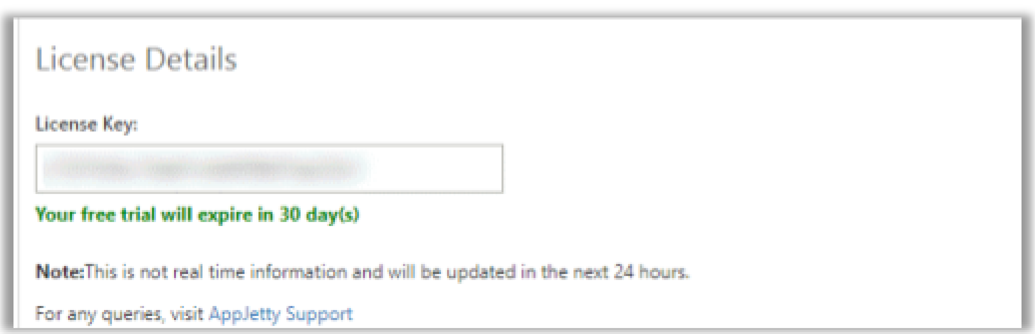
- This will redirect you to our product page and a pop-up will appear. Click on **'Add to Cart'** button and complete the purchase process.



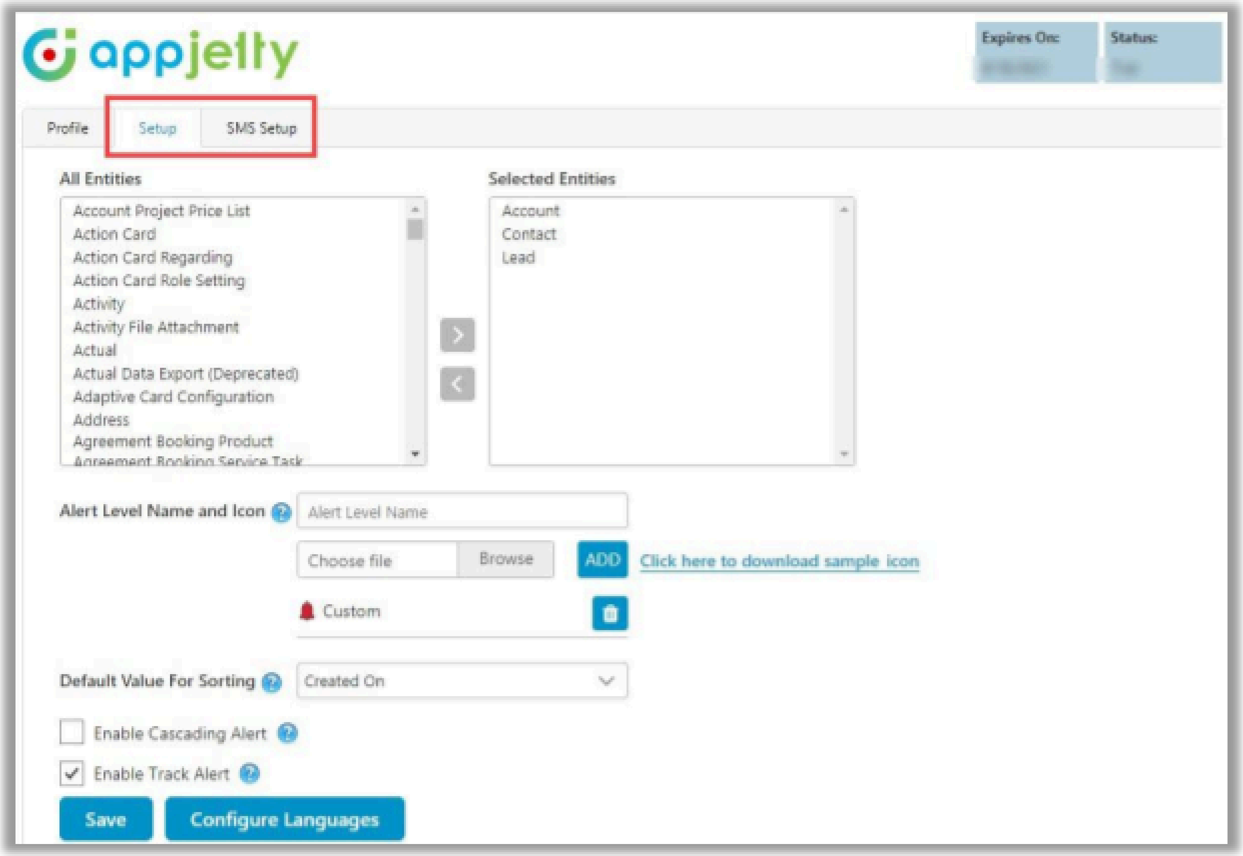
- On successfully completing the purchase process, you will receive your license key via email along with steps to complete the license configuration.



- 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.

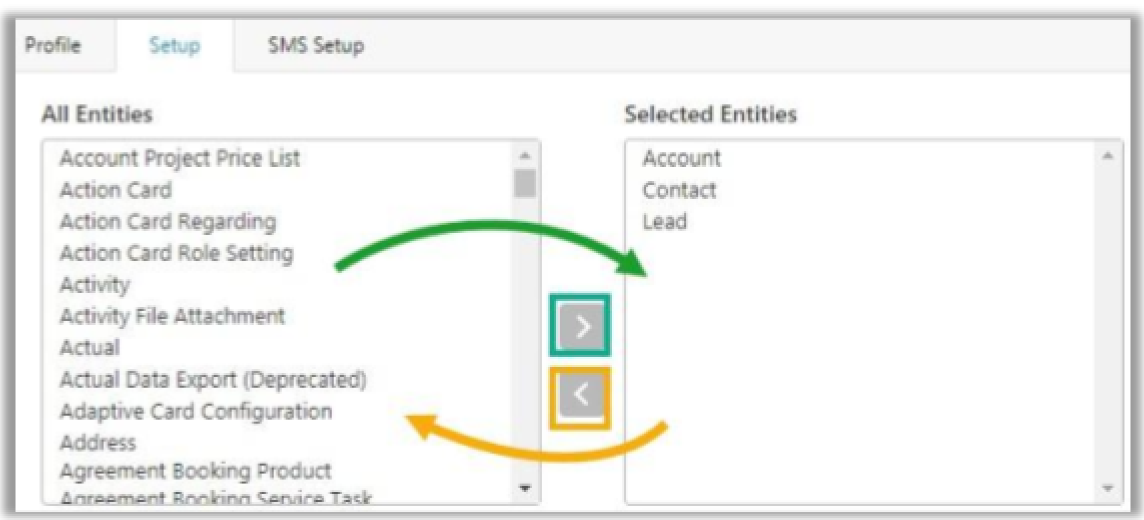


Setup (for App)

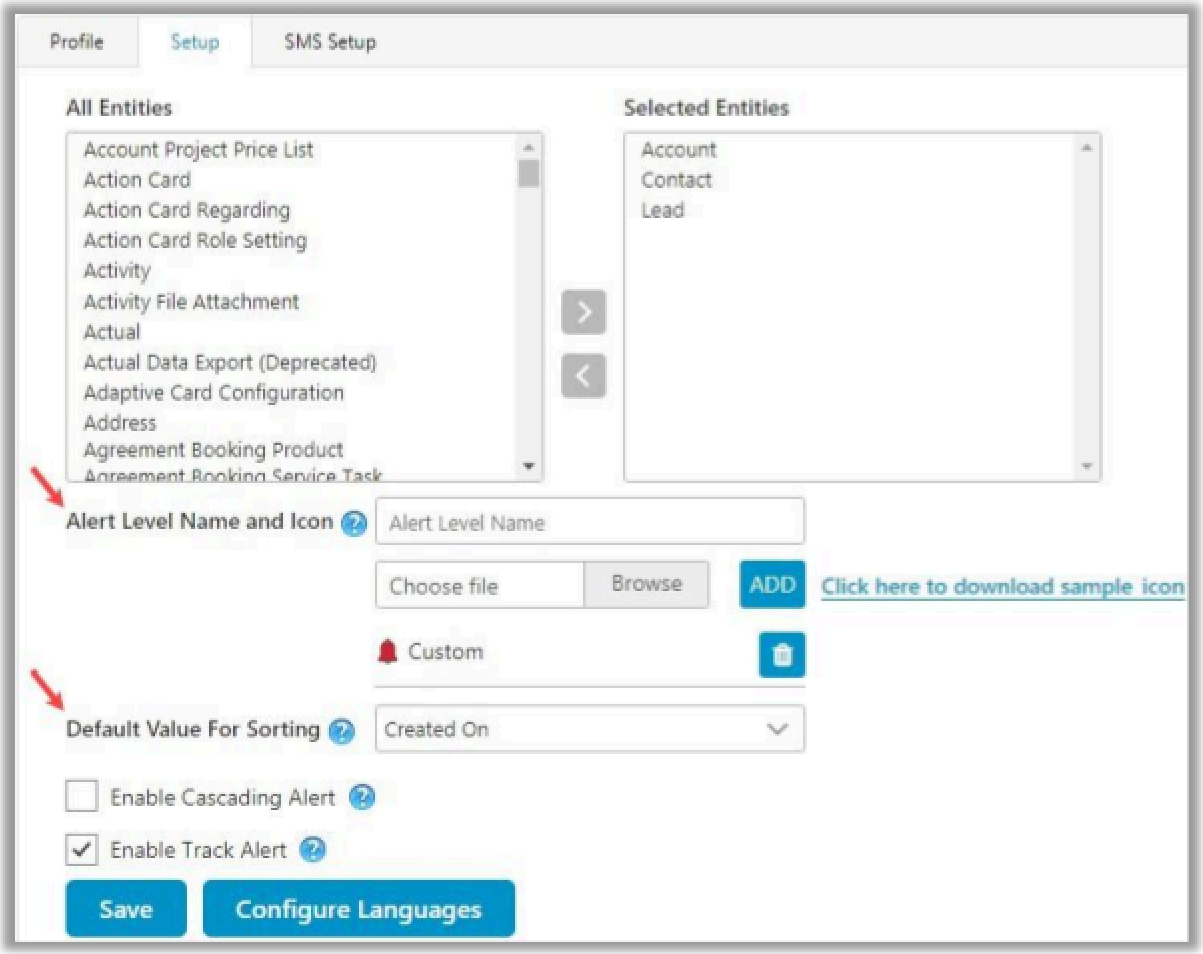
To manage the default configuration settings, click on **'Setup'** tab.

All Entities:

- You can move required entities to **"Selected Entities"** list from **"All Entities"** by using "**Add**" and "**Remove**" icon. You can create alerts only for those entities that are selected here.

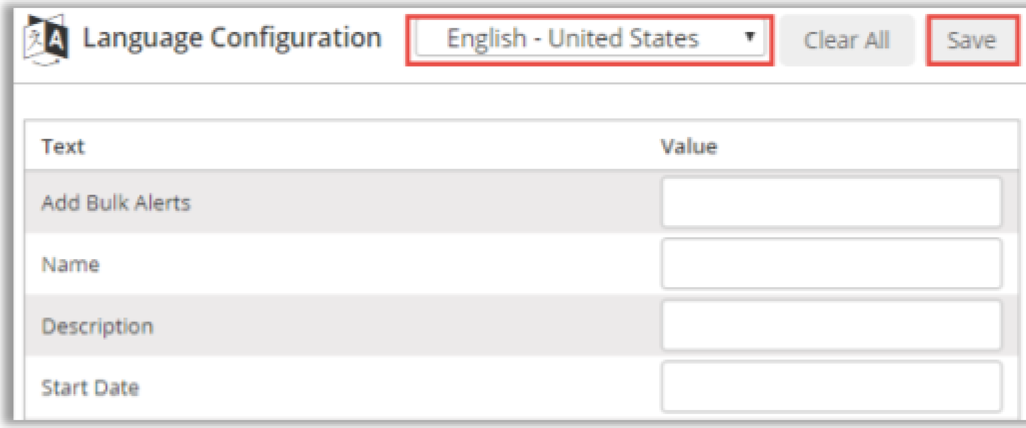


- **Alert Level Name and Icon**:
  - You can add the custom alert levels. Insert "Alert Level Name" and select the specific icon for the uniqueness of the alert. You can add a maximum of 5 different custom alert levels.
  - You can download the sample icon. The icon size must be 16x16 pixels.



- **Default Value For Sorting:**
  - Select the default value for sorting option for the Global alerts. Select the sorting value from the drop-down. The sorting value that you select here will display as default and sort the alerts accordingly. You can select the default value: "Created On", "Priority", or "Entity".
- **Enable Cascading Alert:**
  - Manage settings for cascading alerts and tracking of alerts. Checking Enable Cascading Alert checkbox will enable cascading feature in smart alerts
- **Enable Track Alert:**
  - Checking Enable Track Alert checkbox will enable track alerts feature in smart alerts.
- Click on **"Save"** button to save or update selected entities.

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



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

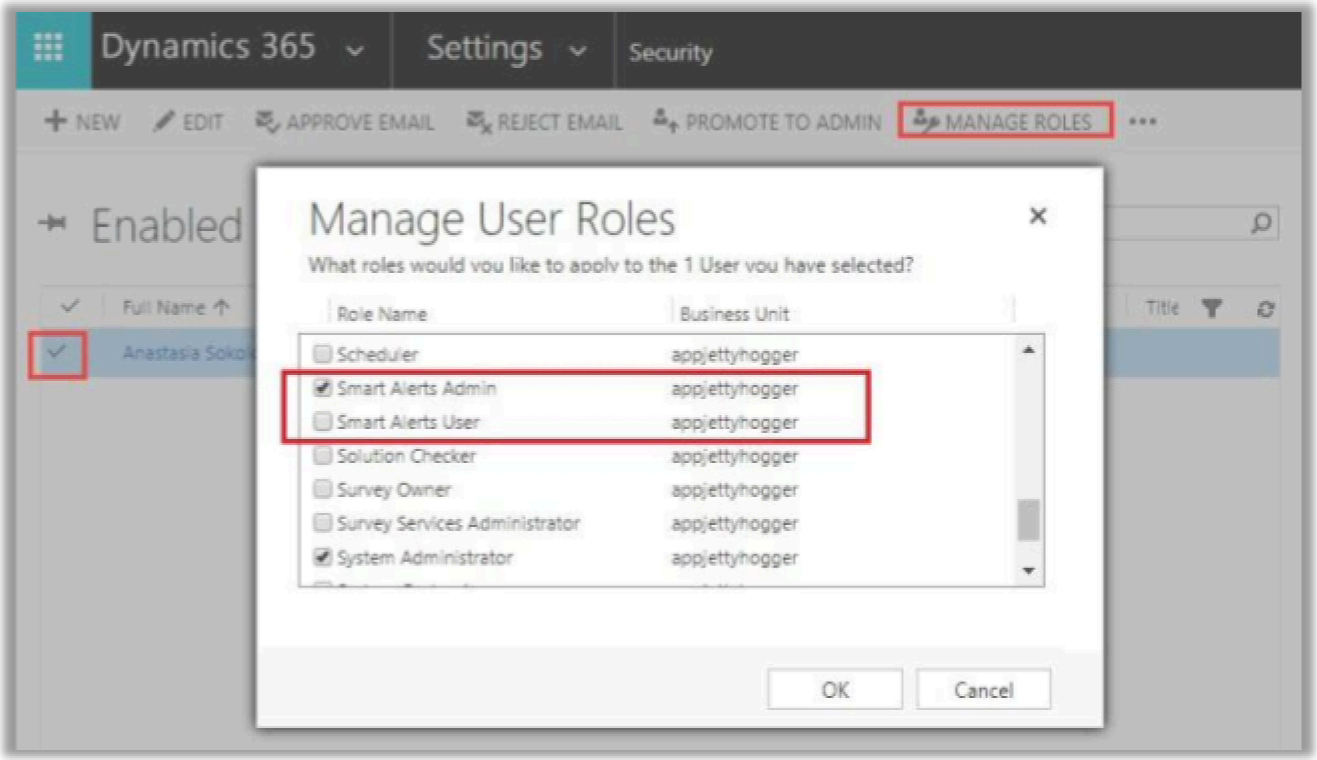
SMS Setup

- 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. 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

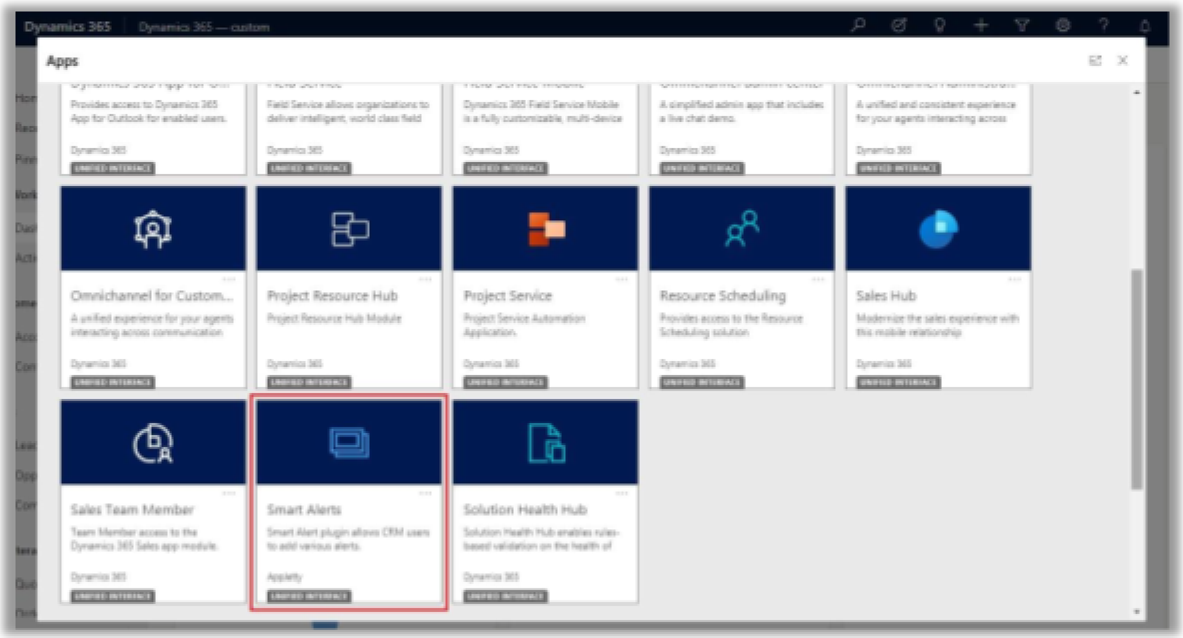
- To assign roles to users, navigate to **Settings -> Security -> Users**.
- In the list, select the user or users whom you want to assign a security role.
- Once users are selected, click on **"Manage Roles"** option from users list page.
- From dialog box, select the security roles you want to assign.



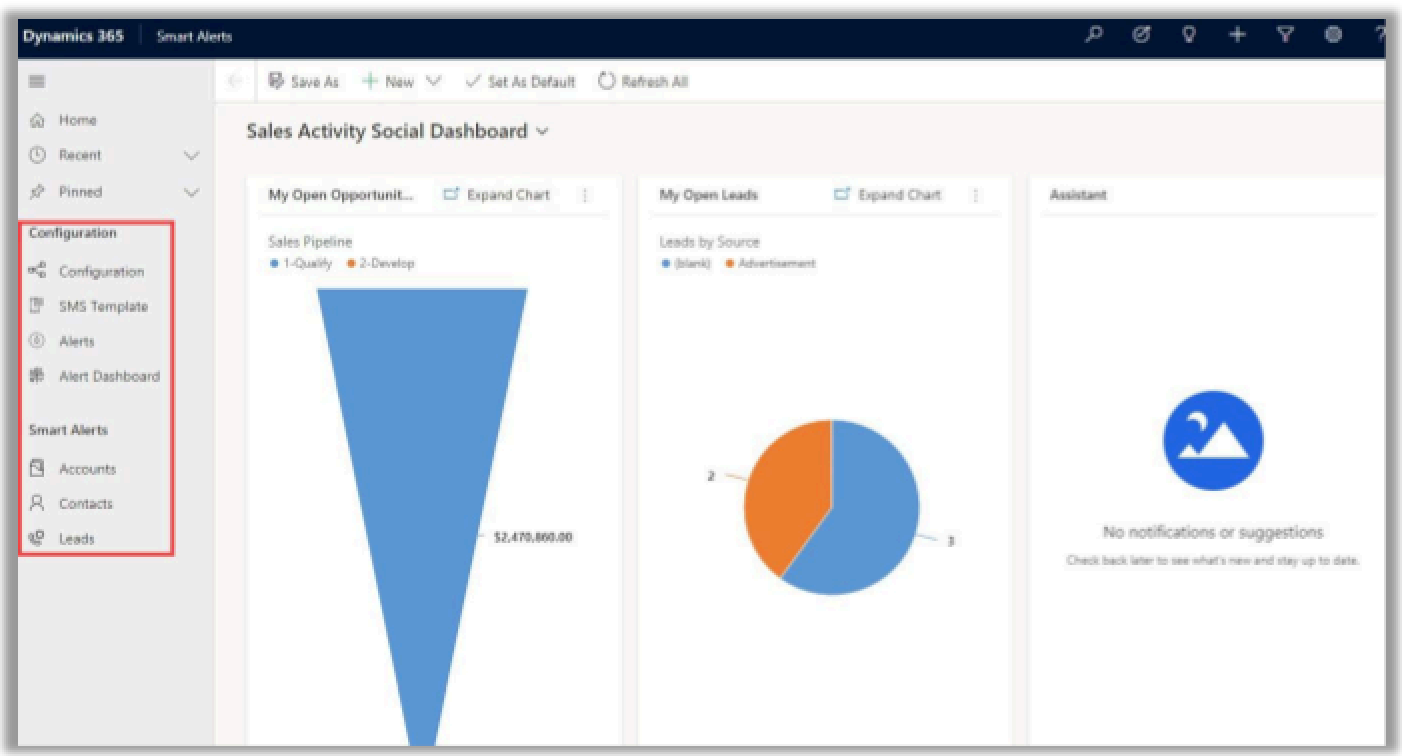
- You can set the following roles for a **Smart Alert Users**:
  - **Smart Alert Admin**: CRM Admin User will be able to create, view, edit and delete alerts.
  - **Smart Alert User:** CRM User will be able to create, view and edit alerts. They will not be able to delete alerts.

Smart Alerts

- Click on the “Smart Alerts” from the Dynamics 365 apps to enable the configure the alerts for the DynamicsCRM entities.



- By clicking on the “Smart Alerts”, you will navigate to the Smart Alerts app page.



- You will see option of the Smart Alerts app from the navigation panel on the left side. You will get the three entities: **Accounts**, **Contacts**, and **Leads**.

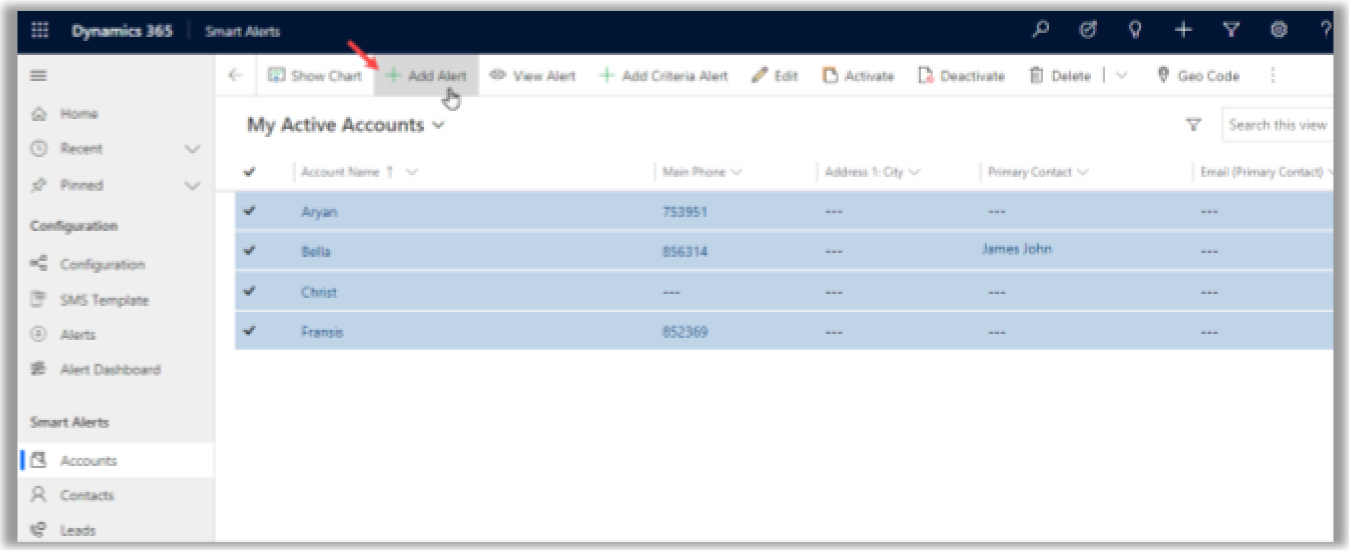
Configuration

- By clicking on the "**Configuration",** the Smart Alert app configuration page will redirect. From here, any DynamicsCRM admin can configure License Details, Setup for App, and enable the SMS-Twilio.

Bulk Alert

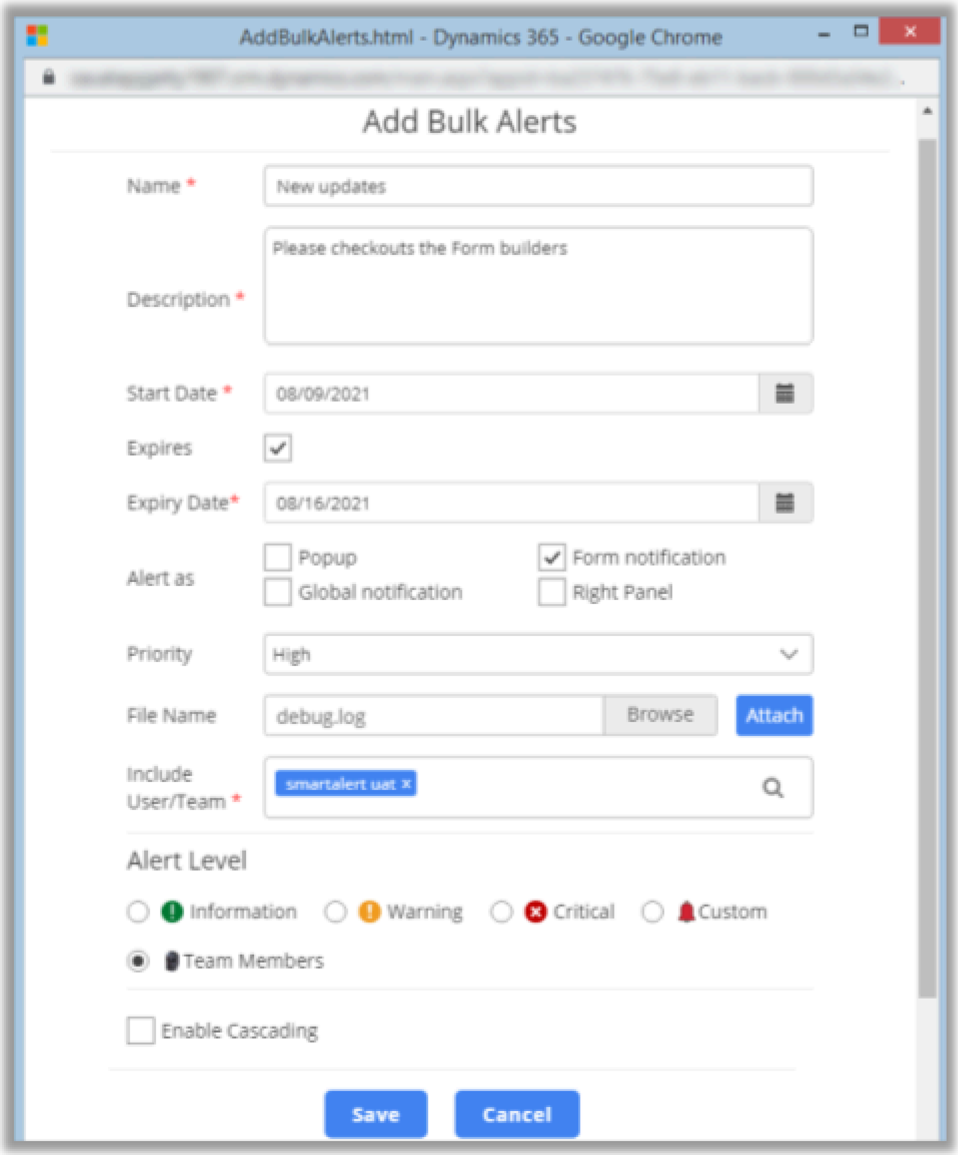
Add Bulk Alert

- Navigate to any entity for which you want to set alerts.
- For example, if you want to set alerts for Accounts, go to **Accounts** from the left navigation pane. 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.



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.

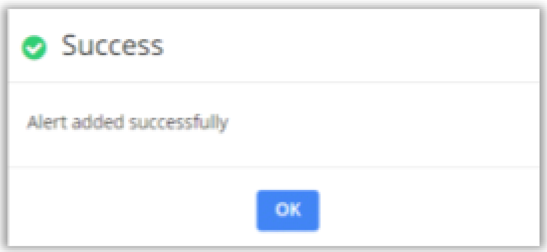
- **Expires:** If it is checked, then it will hold the date on which your alert will expire.
- **Expiry Date:** It will set the expiry date for alert.
- **Alerts As:** Select the option of how you would like to view alert:
  - **Popup:** By checking the popup checkbox, you will get the popup slider from 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 Level:** You can set the alert type as per your requirement.
  Here, you will see the three default types as Information, warning, and critical. You will get the additional custom Alert Levels as you have added from the app setup.

- **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.

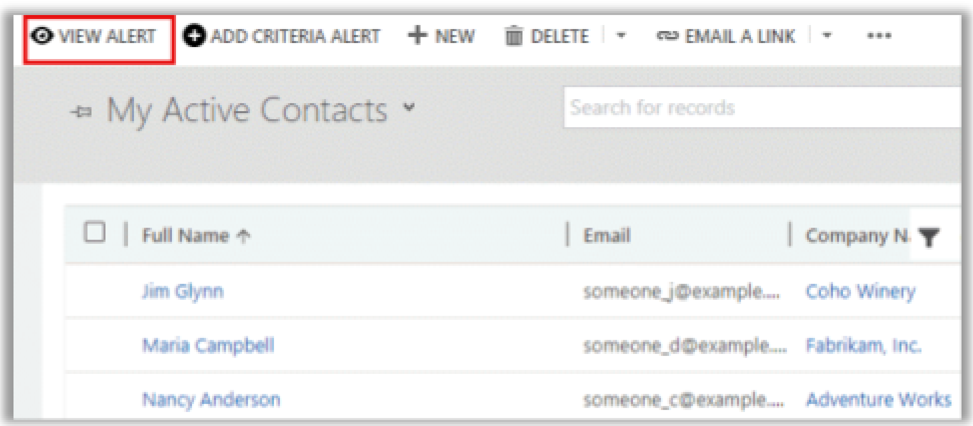
> **Note**: Cascading can only be set for listed entities: **Account, Contact, Case, Lead, Opportunity, Quote, Order** and **Invoice** modules.



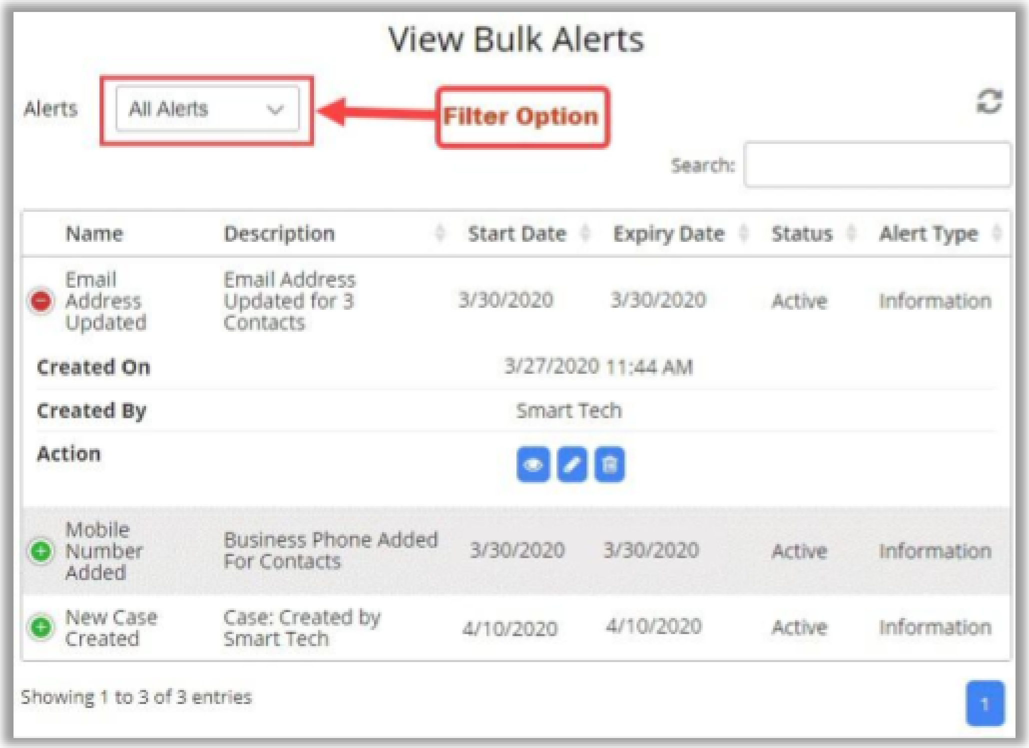
- Once you fill the details, click on **"Save"** button.
- It will display success/failure message.

View Bulk Alert

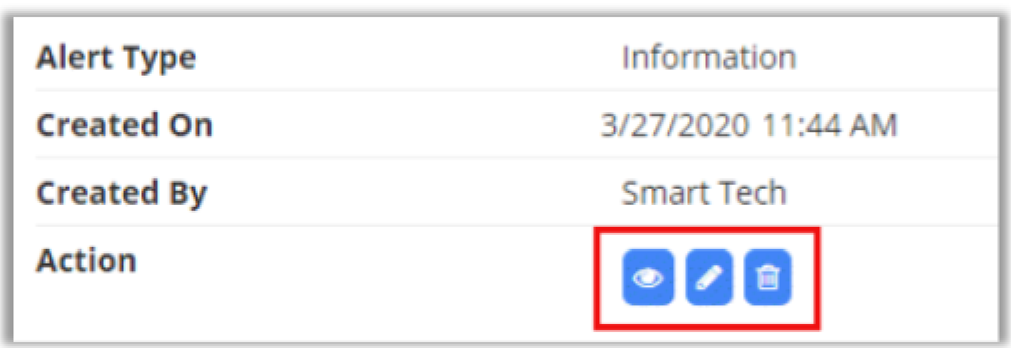
- Navigate to an entity for which you want to view alerts. For example, if you want to view alerts for contacts, go to **Sales -> Contacts.**



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



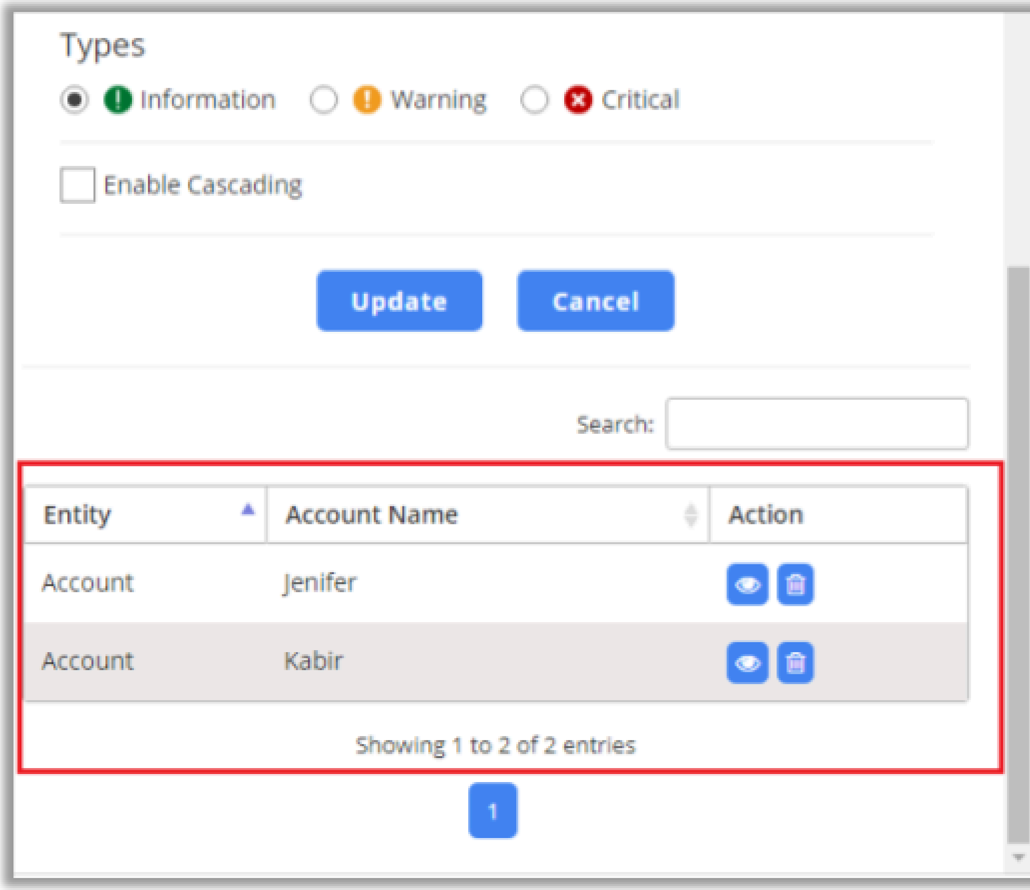
- List will also have option to filter alerts. Filter options are as below:
    - **All Alerts -** It will list all alerts.
    - **Active Alerts -** It will list active alerts and you can **"Deactivate"** active alerts.
    - **Inactive Alerts -** It will list inactive alerts and you can **"Activate"** inactive alerts.
    - **Expired Alerts -** It will list expired alerts.
    - **Pop-up Alerts –** It will list all pop-up alerts.



- 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.



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

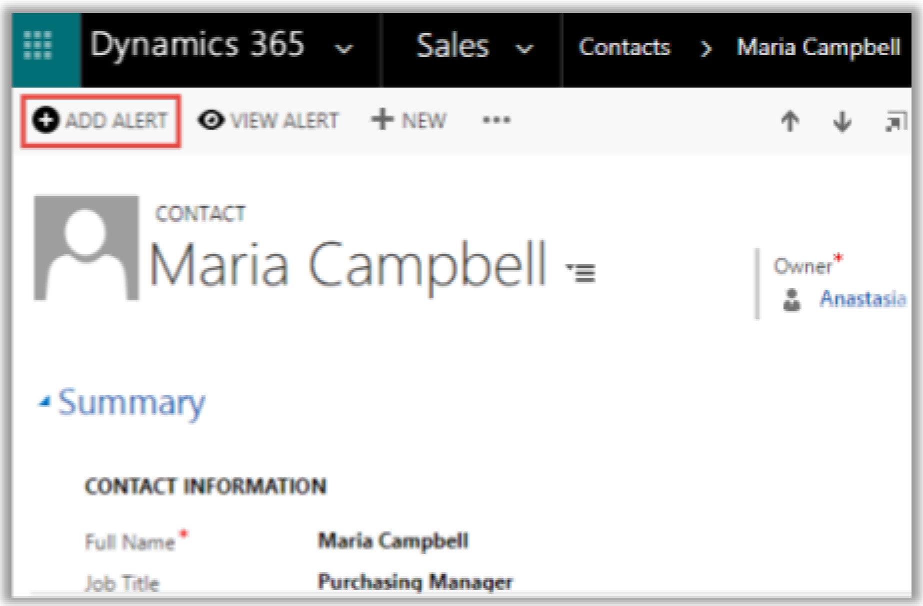
Note: Only user with **'Smart Alerts Admin'** or **'System Administrator Role'** will be able to delete an alert.

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.**

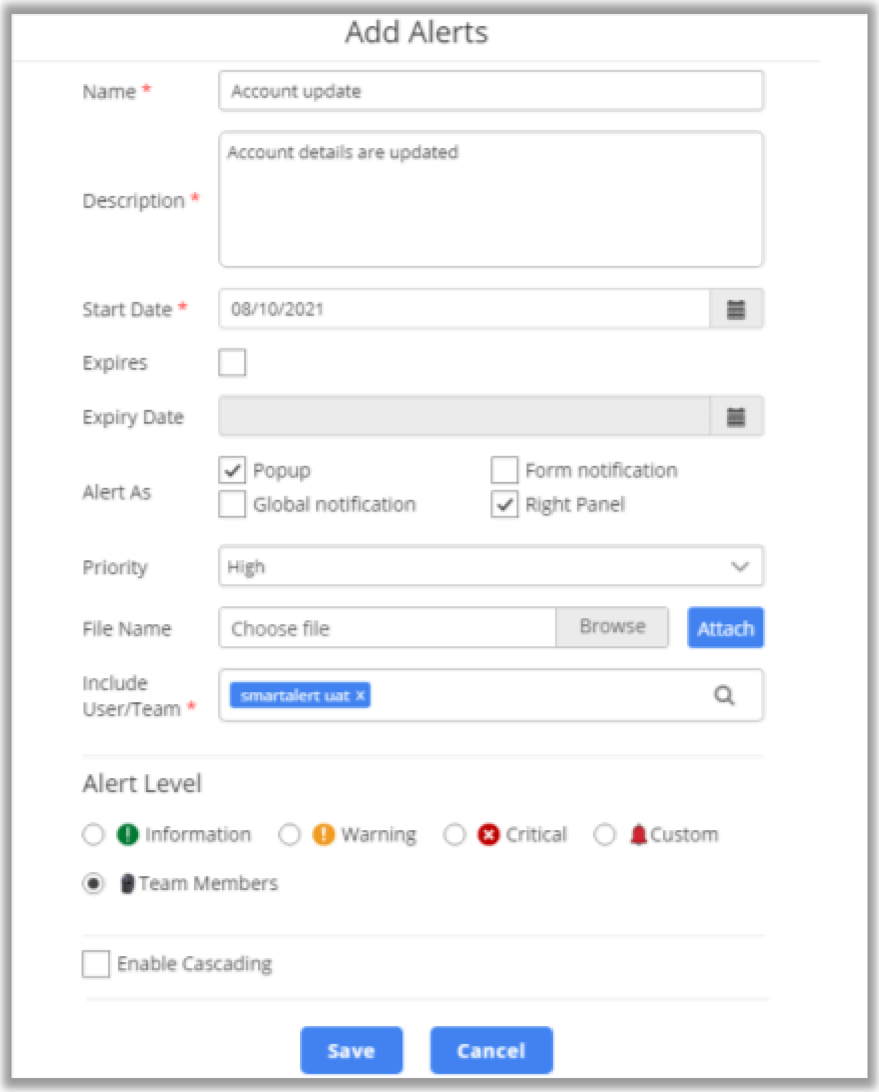
- Click on record name and navigate to detail view of that particular record.



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.
- **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.

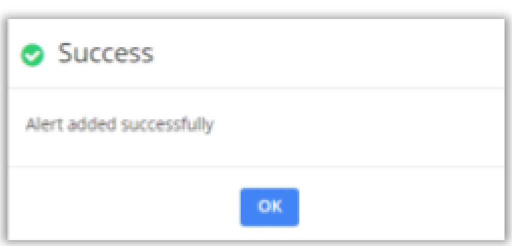
- **Alert Level**: You can set the alert type as per your requirement.
  Here, you will see the three default types as Information, warning, and critical. You will get the additional custom Alert Levels as you have added from the app setup.



- **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.

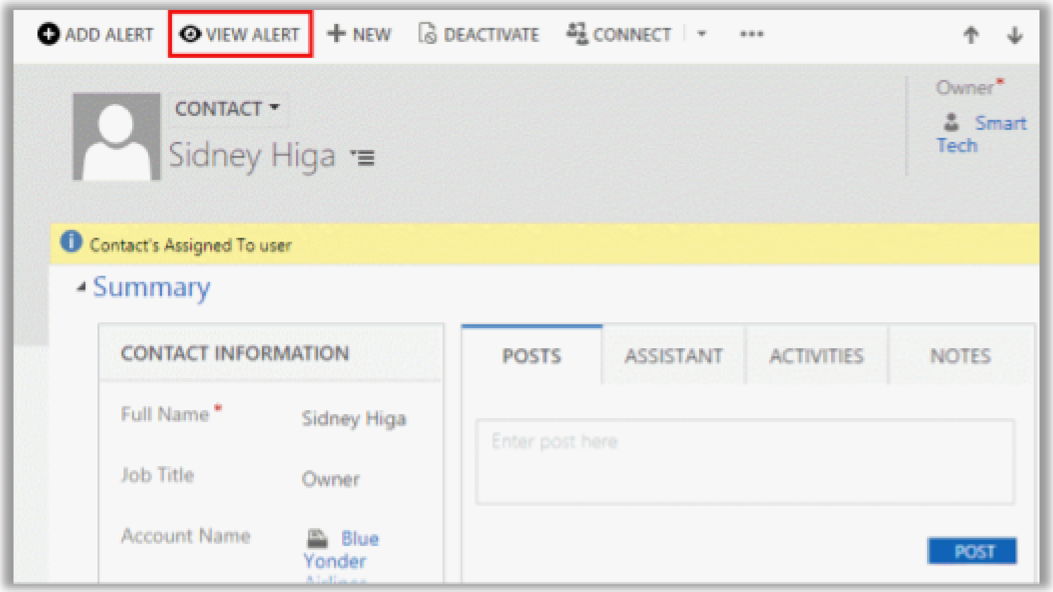
Note: Cascading can only be set for listed entities: **Account, Contact, Case, Lead, Opportunity, Quote, Order** and **Invoice** modules.

- Once you fill the details, click on **"Save"** button. It will display success/failure message.

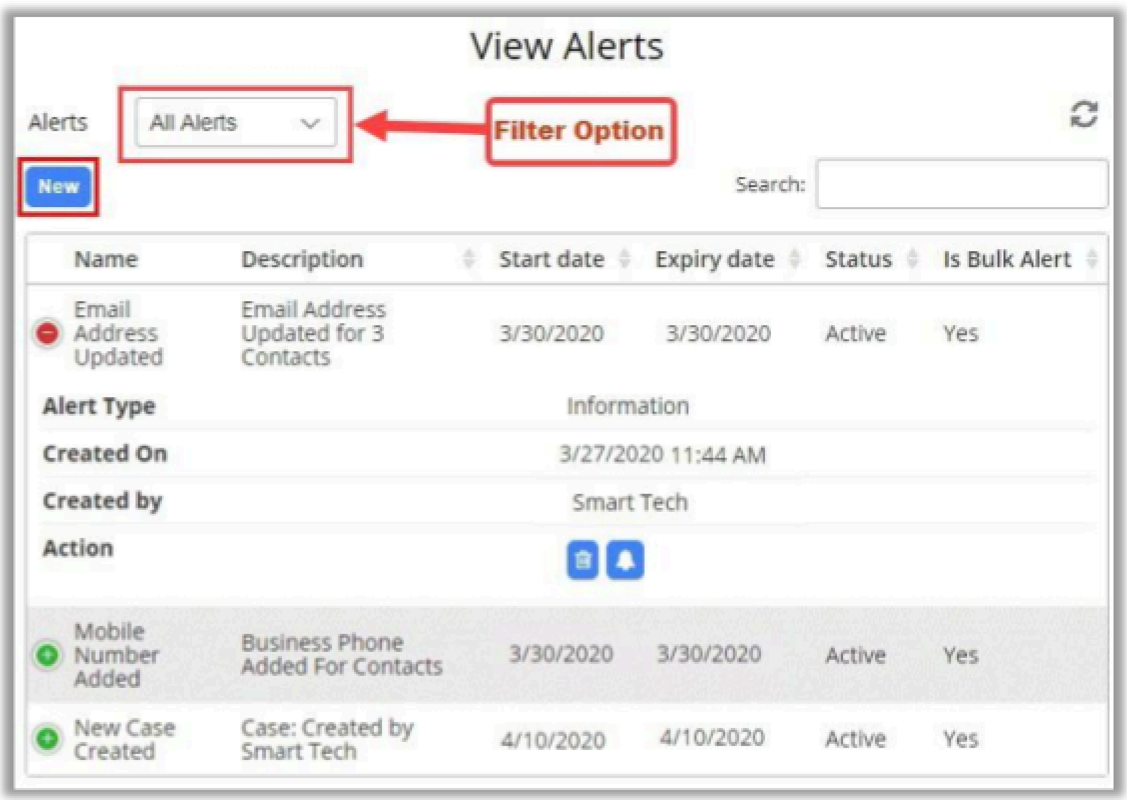


View Alert

- Navigate to detail view of that specific 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.

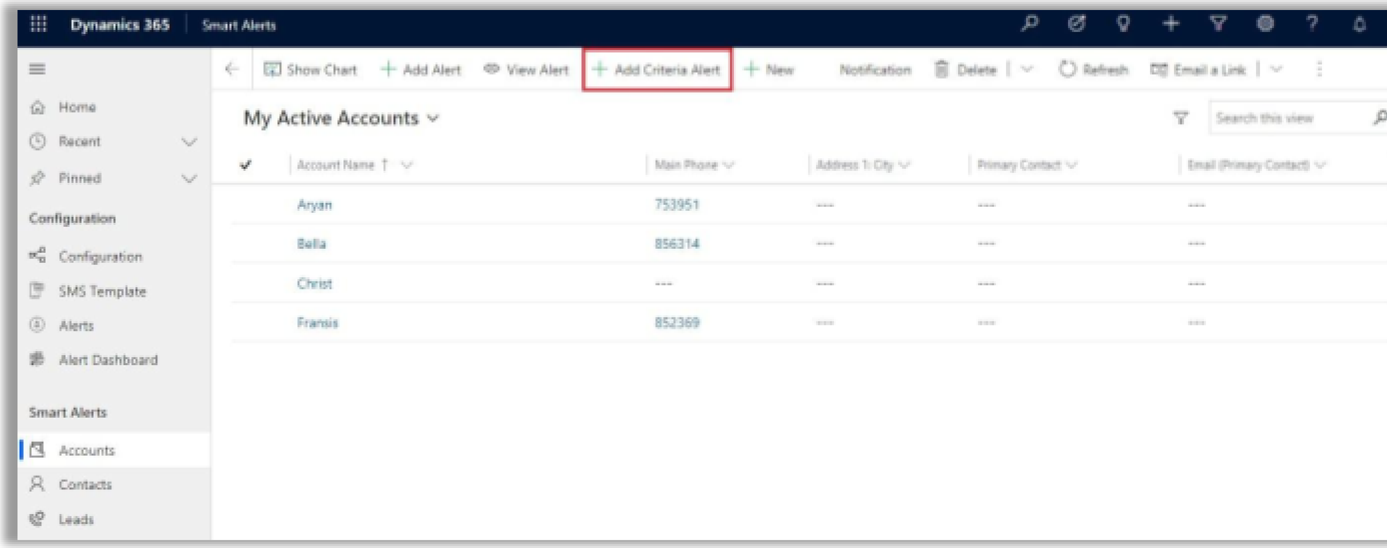
- For alerts shows, you can edit, delete as well as track alerts.

> - **Note**: Alert under the Entity can only be edited and viewed from bulk alert list.

Criteria Alert

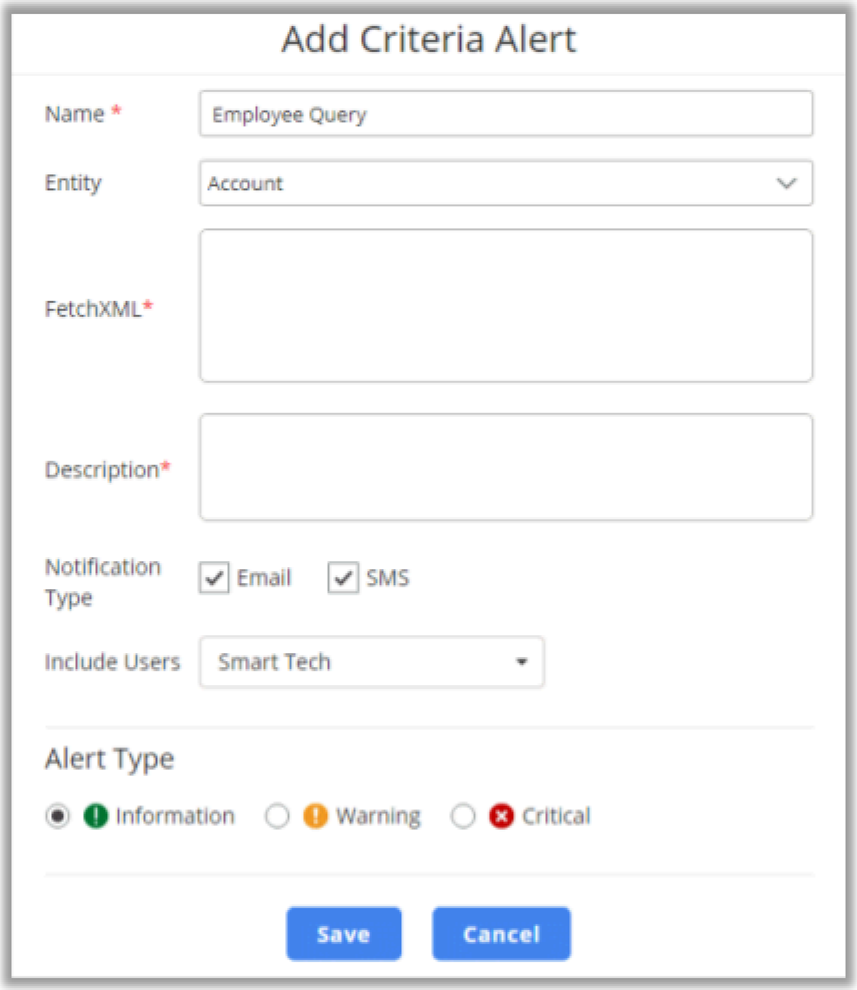
Add Criterial Alert

- Navigate to any entity for which you want to set criteria alerts. For example, if you want to set alerts for accounts, click on the **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.

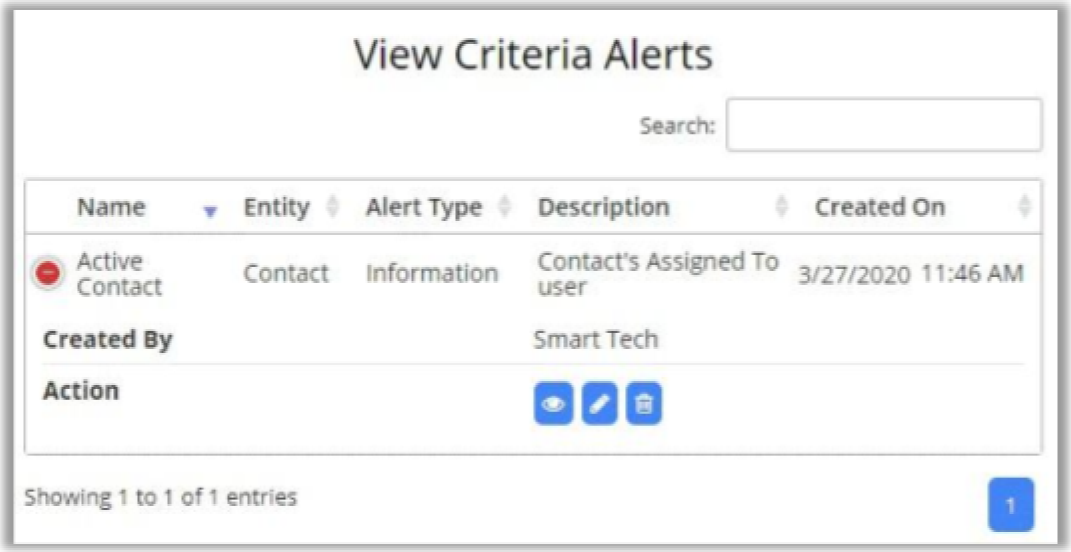
- **Name**: It will contain the brief description of alert.
- **Entity**: It will show the entity name for which the alert is being set.
- **FetchXML:** User needs to add FetchXML Query file.
- **Description:** Add the description of the alert that you wish to view.



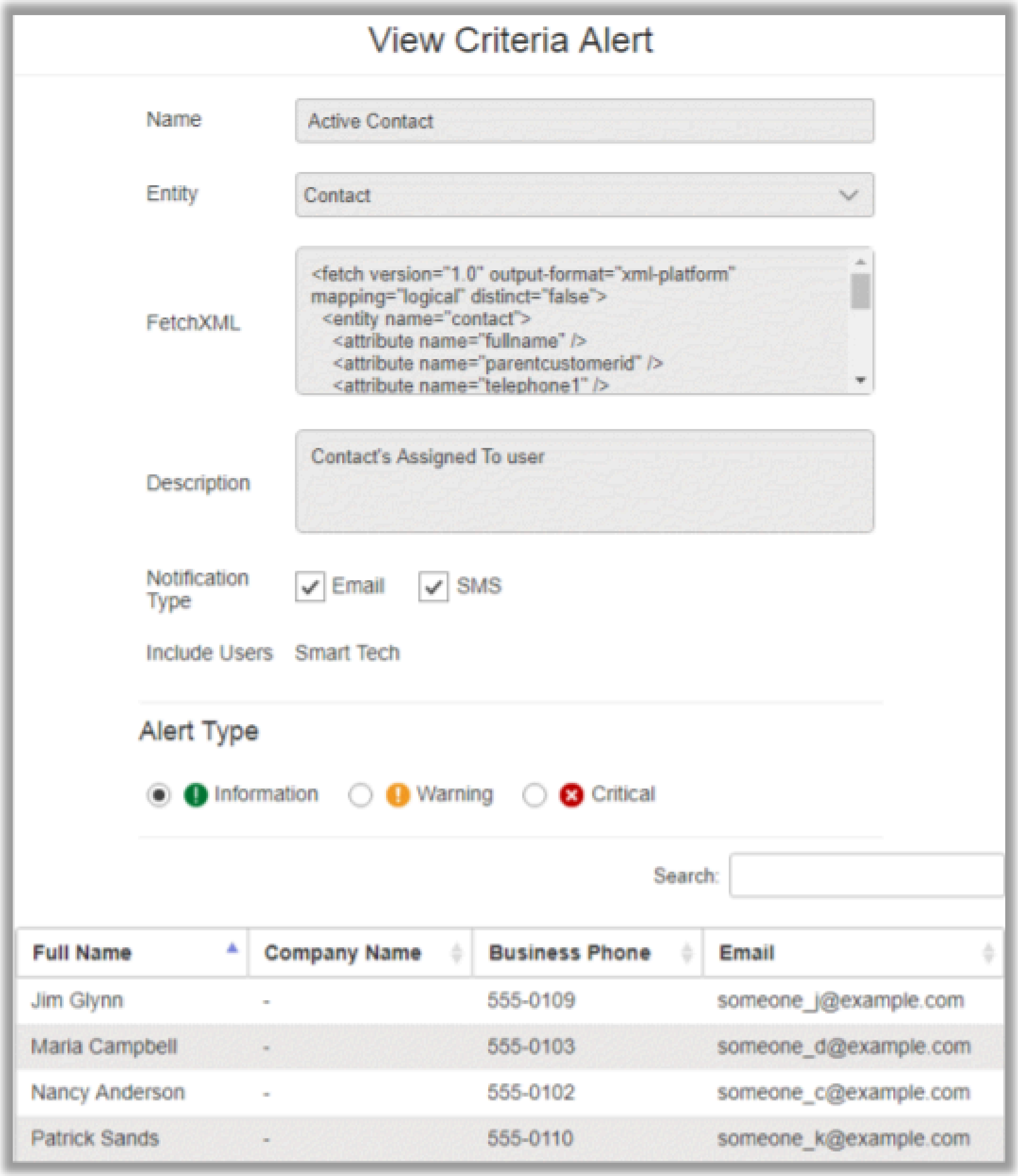
- **Notification Type:** For critical alert by default form notification is shown upon accessing a particular record. Other than that, you can select Email and SMS as the notification form. SMS option will be shown only when SMS set up has been done.
- **Include Users:** You can select users to whom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

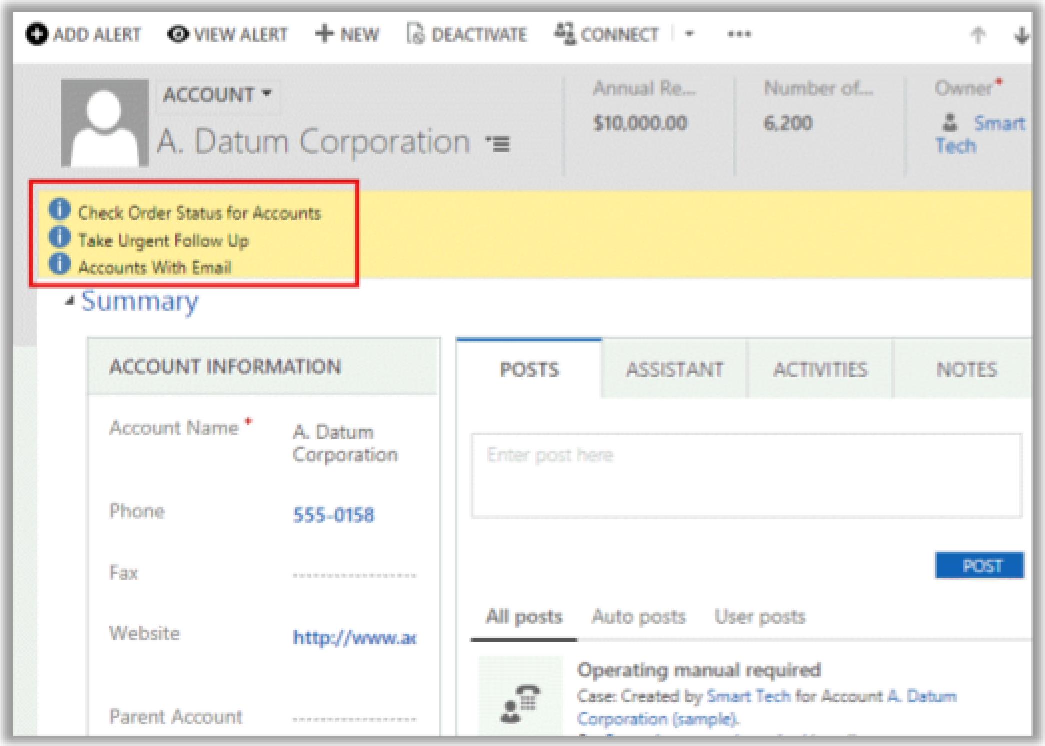


- Clicking on **'View Alerts'**, user will also be able to view criteria alerts created for the particular entity.
- For each criteria alert, there are different action buttons like **View**, **Edit** and **Delete**.



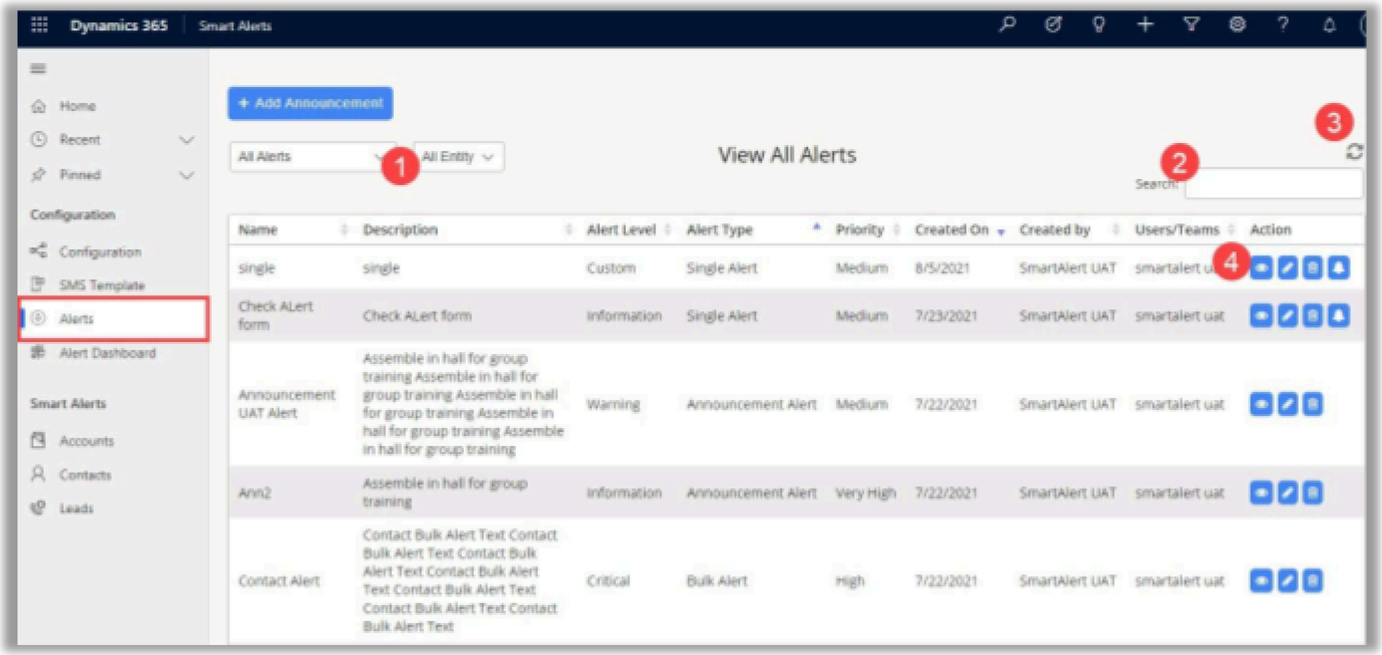
- Clicking on **View**, you also get to know with which records criteria alert is associated to.
- If you have **checked** the **email** option at the time of adding criteria alert, on fulfilling the alert condition, you will get an email.

- 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.



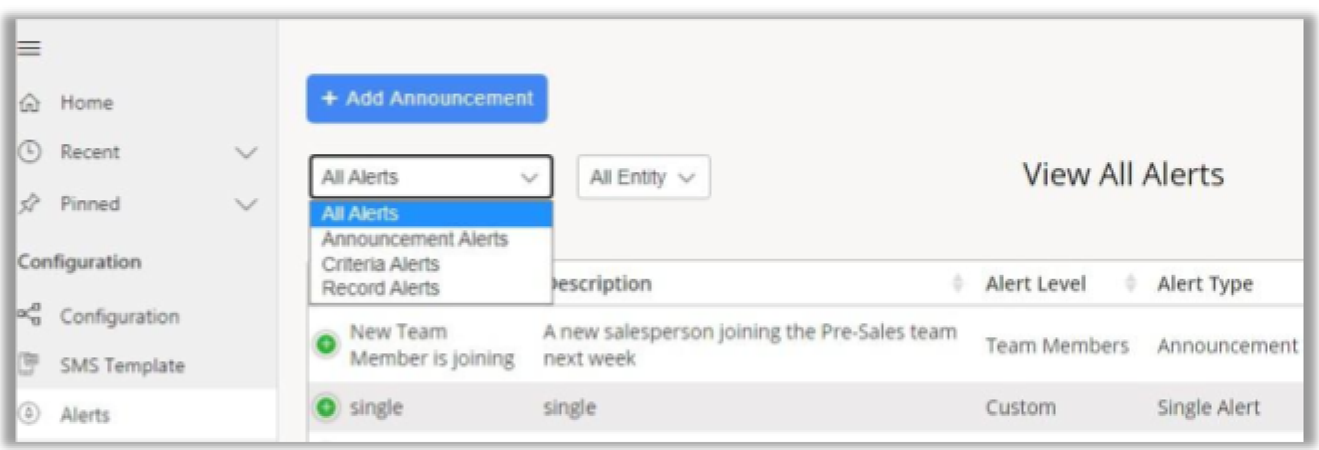
Alerts

- Click on the **"Alerts"** from the navigation pane. You can view all the Alerts on the single page.
- You can view the alerts with the details such as Name, Description, Alert Level, Type, Priority, Created On, By, User/Team, Action.

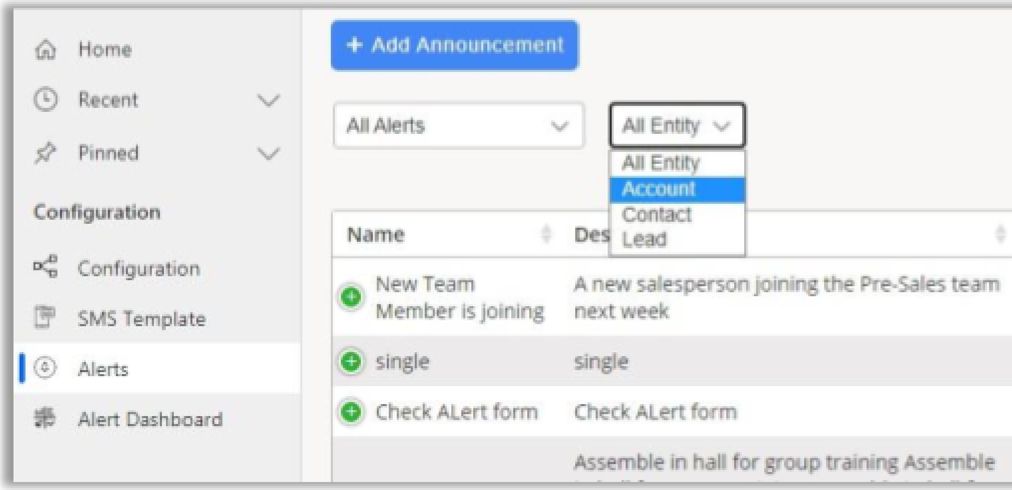


1. You can filter the list of the alerts by "Alert Type" and "Entity Type".
2. You can search the specific alert by inserting the text caption.
3. You can refresh and update the alerts by clicking on the 'Refresh' icon.
4. You can perform the action like View, Edit, Delete, Alert Status.

- Here, the admin users will get all the users' alerts in the list. But, the normal users (team members) only can see their individual alerts.
- You can filter and search the alerts as per the "Alerts Type":
  > All Alerts > Announcements Alerts > Criteria Alerts > Record Alerts.

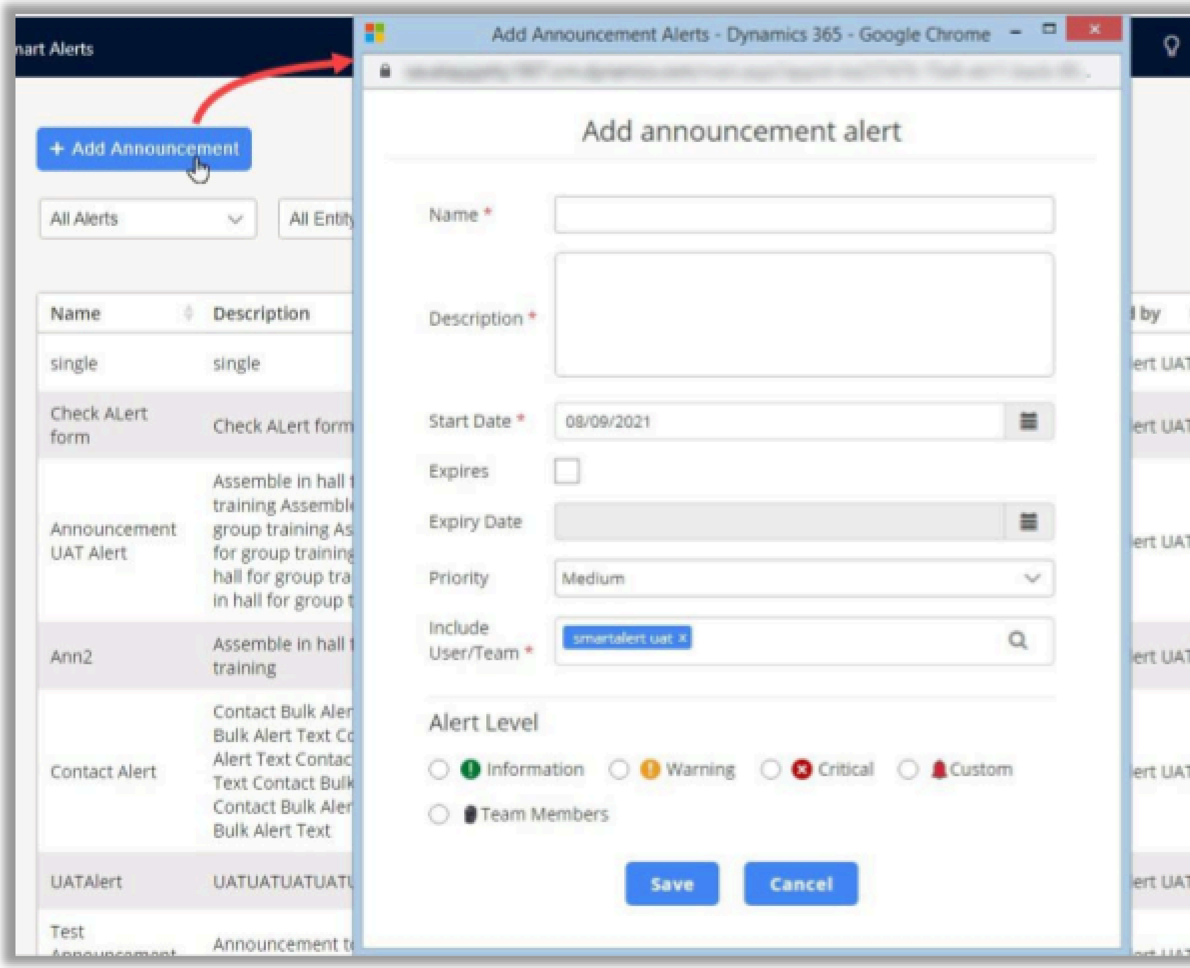


- You can filter and search the alerts as per the “Entity Type” that are enabled.



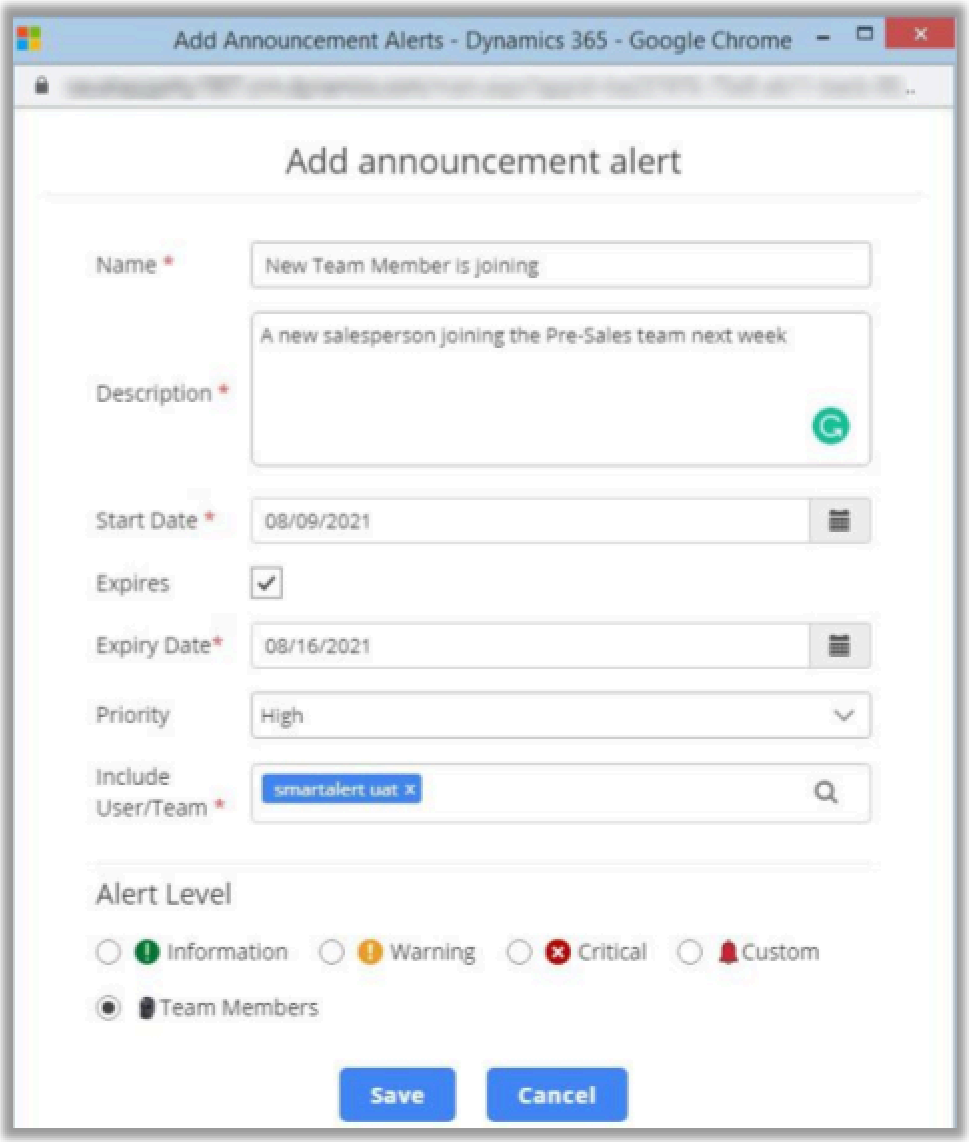
Add new Announcement Alert

- You can add a new general announcement (global announcement). To add a new announcement, click on the **+ Add Announcement**.



- You will get the popup named Add announcement alert.

- You need to insert following details for the Announcement alert:
  - Name: Insert relevant announcement to identify the alerts for what.
  - Description: Insert short message/description to share any update or message.
  - Start Date: It will select current date by default. You can change the date when you want to share announcement.

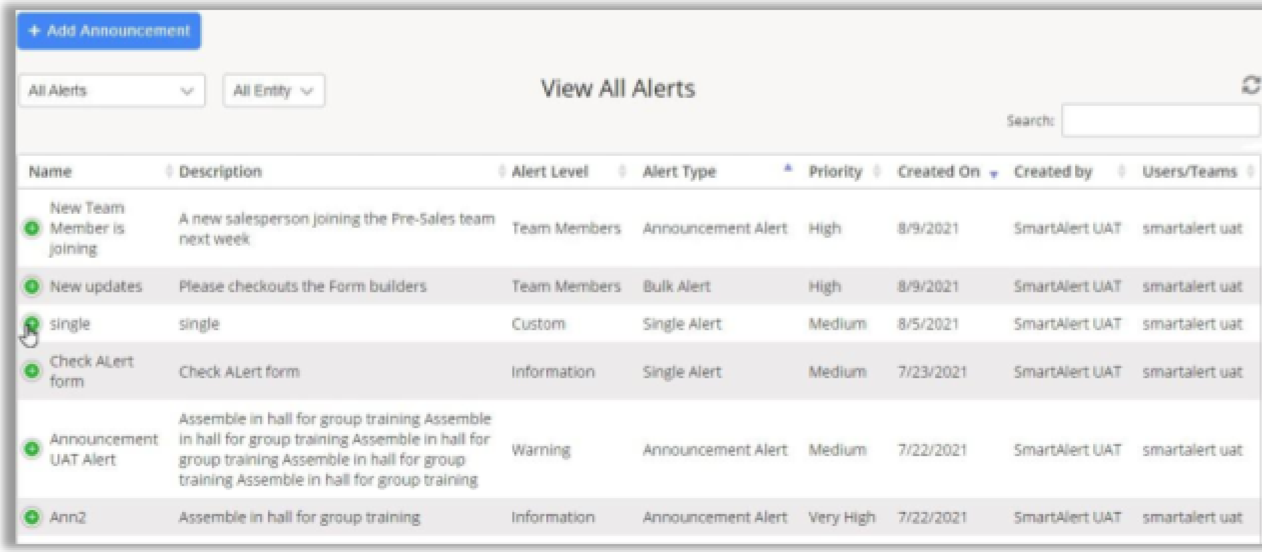


  - Expires: If you want to set the alert for limited duration, enable this option to select the expiry date.
  - Expiry Date: Select the expiry date for announcement alert.
  - Priority: Set the priority of the announcement alert.
  - Include User/Team: Insert the required User/Team to send the announcement alert.
  - Alert Level: You can select the Alert Level (Alert type). Here you will get the Alert levels except default three (Information, Warning, and Critical) that are added from the app setup.

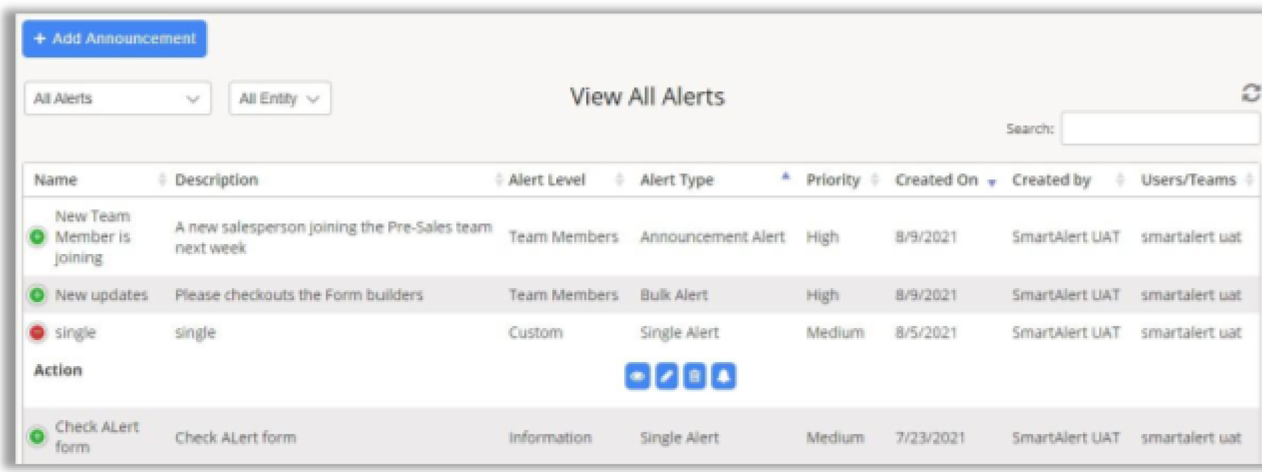
- After inserting the required details, click on the **Save** button and announcement will be shared with the selected User/Team.

Edit/View Alerts

- You can perform the actions of the alerts by clicking on the **+** icon.



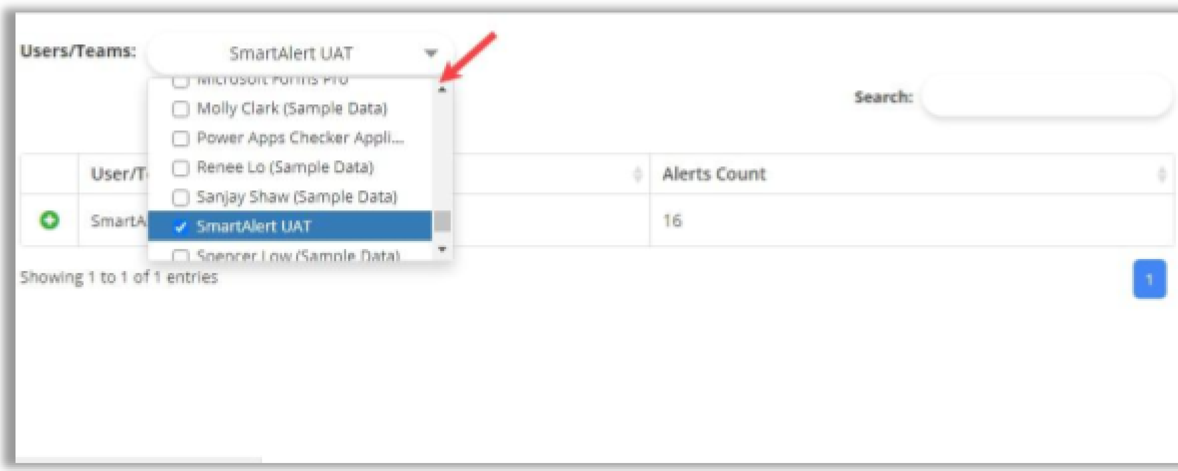
- You can perform the action for the alerts. View, Edit, Delete, and Alert status.



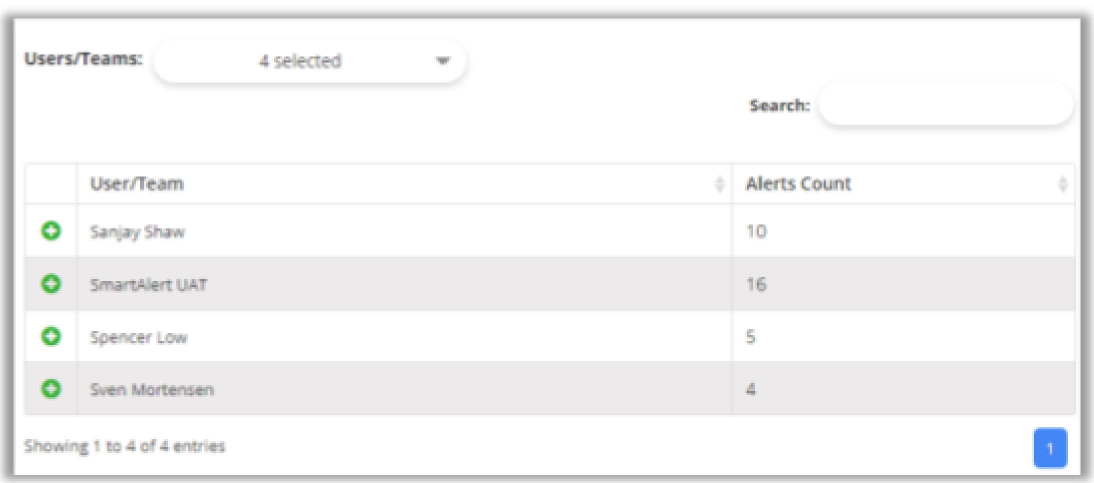
Alert Dashboard

- Click on the “Alert Dashboard” to track and check the user wise alerts. You will get the user wise alerts count.

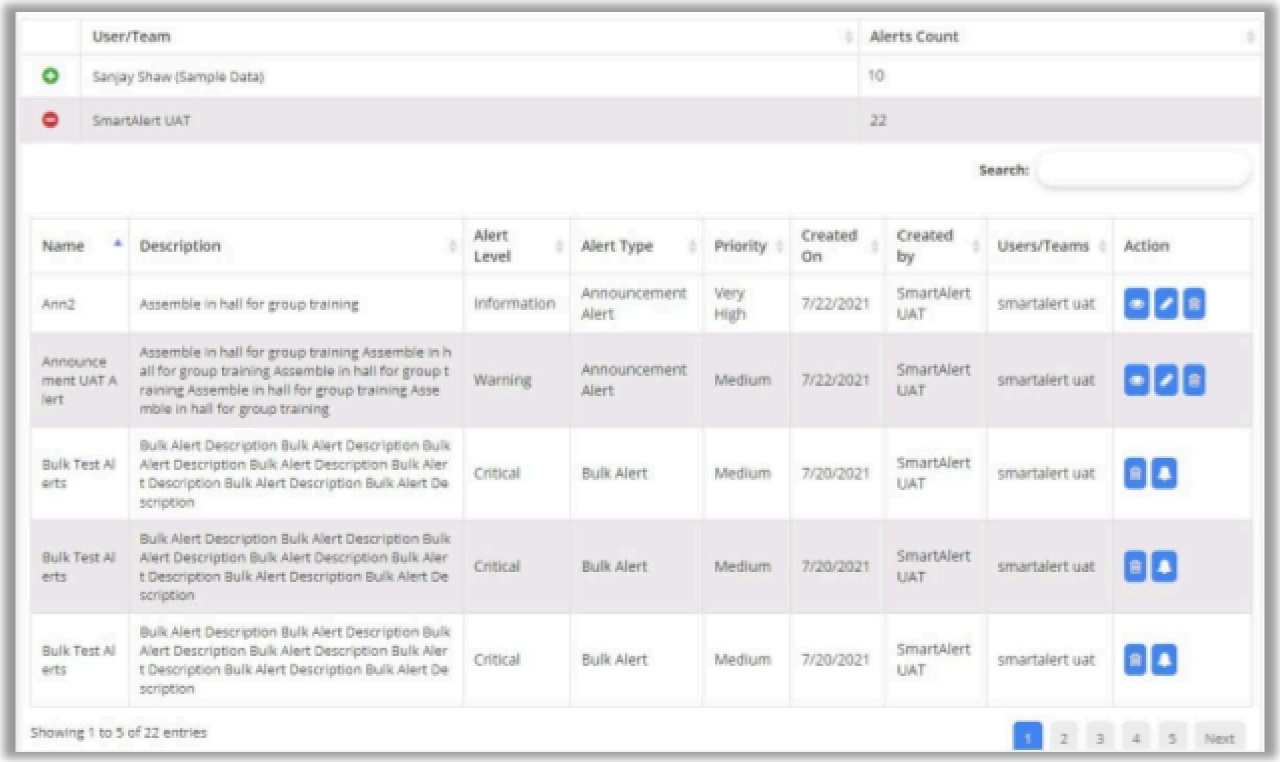
- You will see “Users/Teams” drop-down option to check the user wise alerts.



- You can select multiple Users/Teams by checking the checkbox.



- By clicking on the **+** icon of the specific User/Team, you will see the list of alerts with the details like Name, Description, Alert Level, Type, Priority. Created On., By, Users/Team and Action for the alerts.



	User/Team	Alerts Count
+	Sanjay Shaw (Sample Data)	10
−	SmartAlert UAT	22

Search:

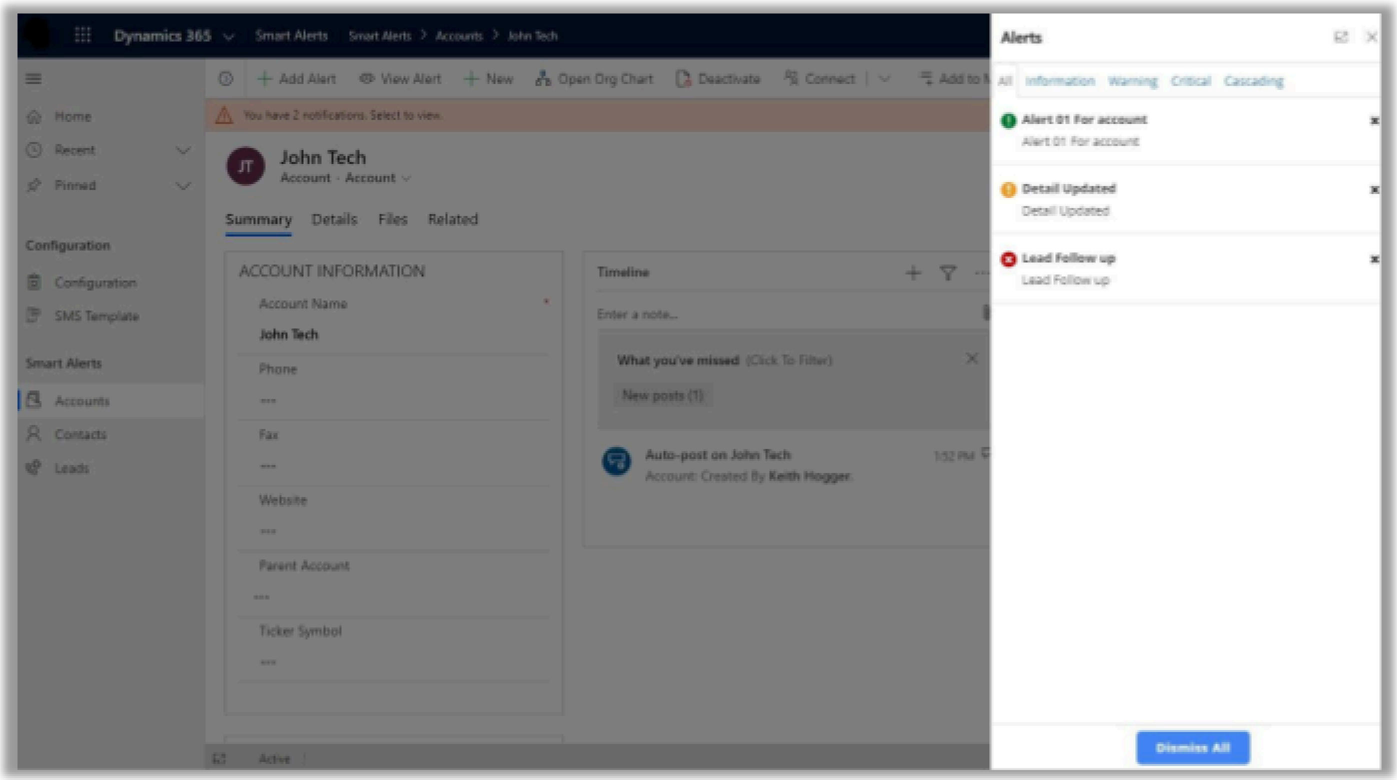
Name	Description	Alert Level	Alert Type	Priority	Created On	Created by	Users/Teams	Action
Ann2	Assemble in hall for group training	Information	Announcement Alert	Very High	7/22/2021	SmartAlert UAT	smartalert uat	
Announcement UAT Alert	Assemble in hall for group training Assemble in hall for group training Assemble in hall for group training Assemble in hall for group training	Warning	Announcement Alert	Medium	7/22/2021	SmartAlert UAT	smartalert uat	
Bulk Test Alerts	Bulk Alert Description Bulk Alert Description Bulk Alert Description Bulk Alert Description Bulk Alert Description Bulk Alert Description	Critical	Bulk Alert	Medium	7/20/2021	SmartAlert UAT	smartalert uat	
Bulk Test Alerts	Bulk Alert Description Bulk Alert Description Bulk Alert Description Bulk Alert Description Bulk Alert Description Bulk Alert Description	Critical	Bulk Alert	Medium	7/20/2021	SmartAlert UAT	smartalert uat	
Bulk Test Alerts	Bulk Alert Description Bulk Alert Description Bulk Alert Description Bulk Alert Description Bulk Alert Description Bulk Alert Description	Critical	Bulk Alert	Medium	7/20/2021	SmartAlert UAT	smartalert uat	

Showing 1 to 5 of 22 entries

1 2 3 4 5 Next

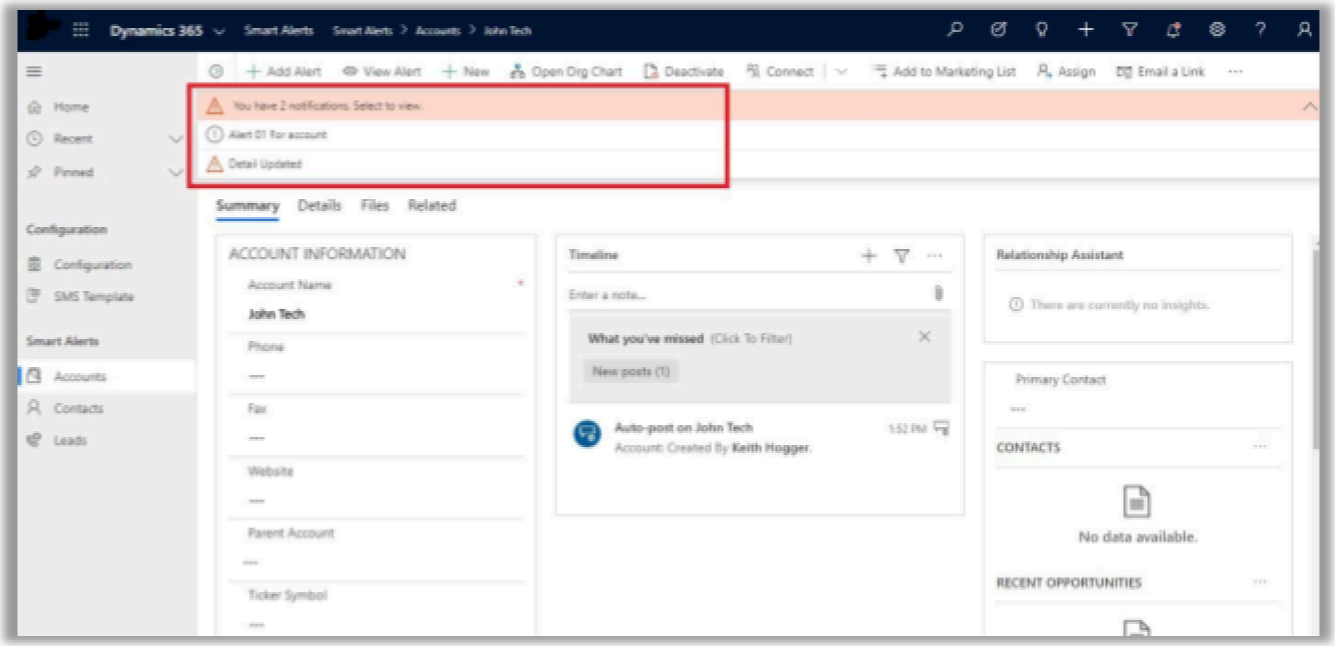
Popup Alerts (Record Popup Alerts)

- 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.

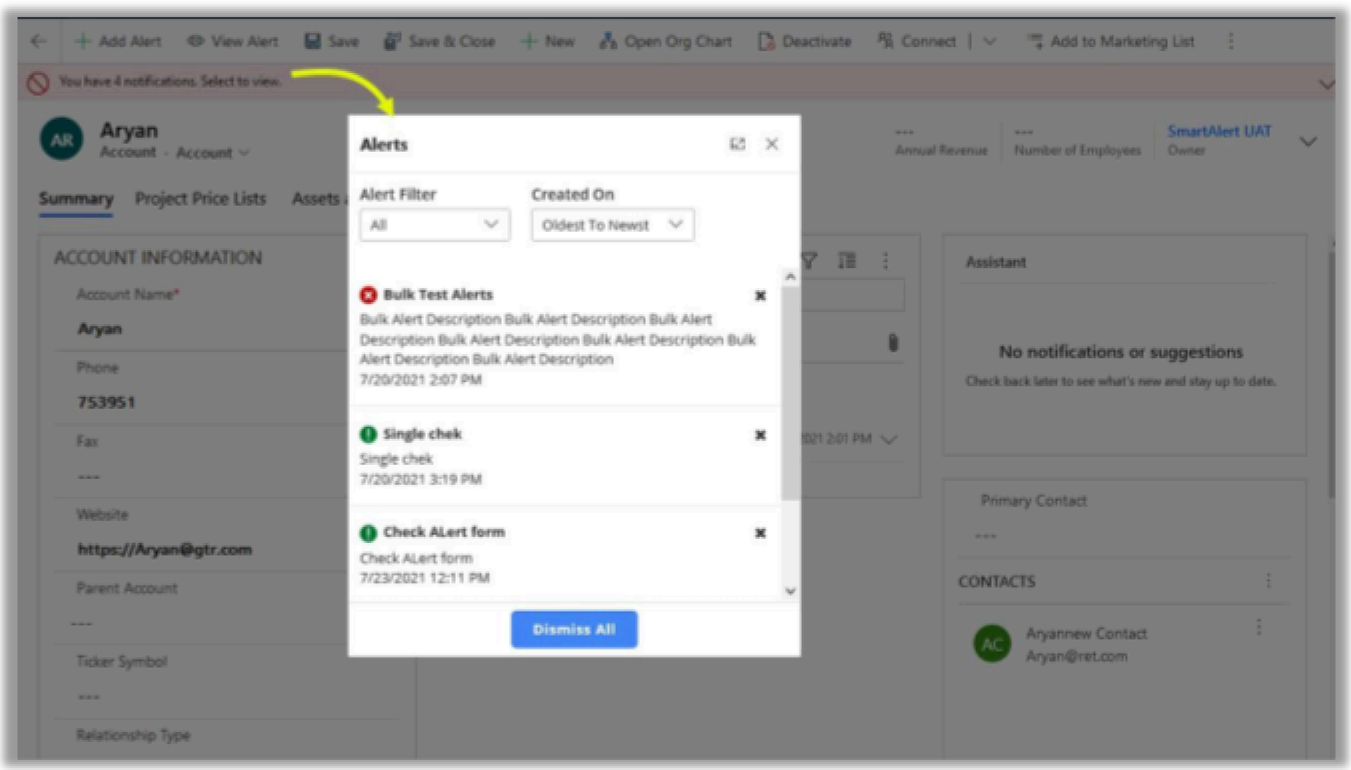


Form Notification

- 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.



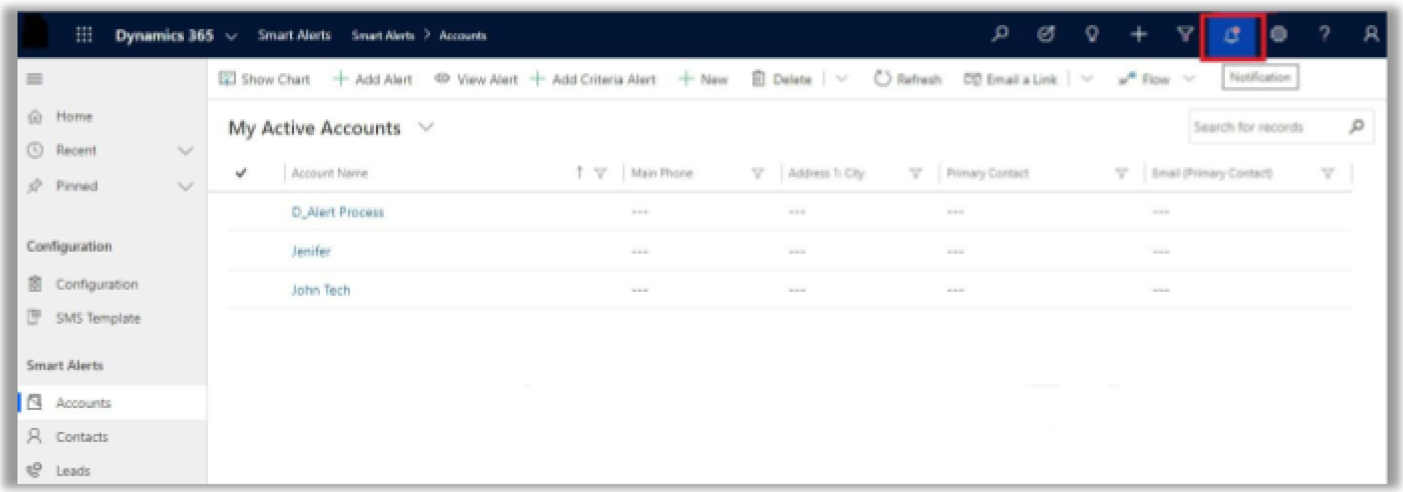
- By clicking on any Entity Form's alerts, you will see all the alerts in the popup view.



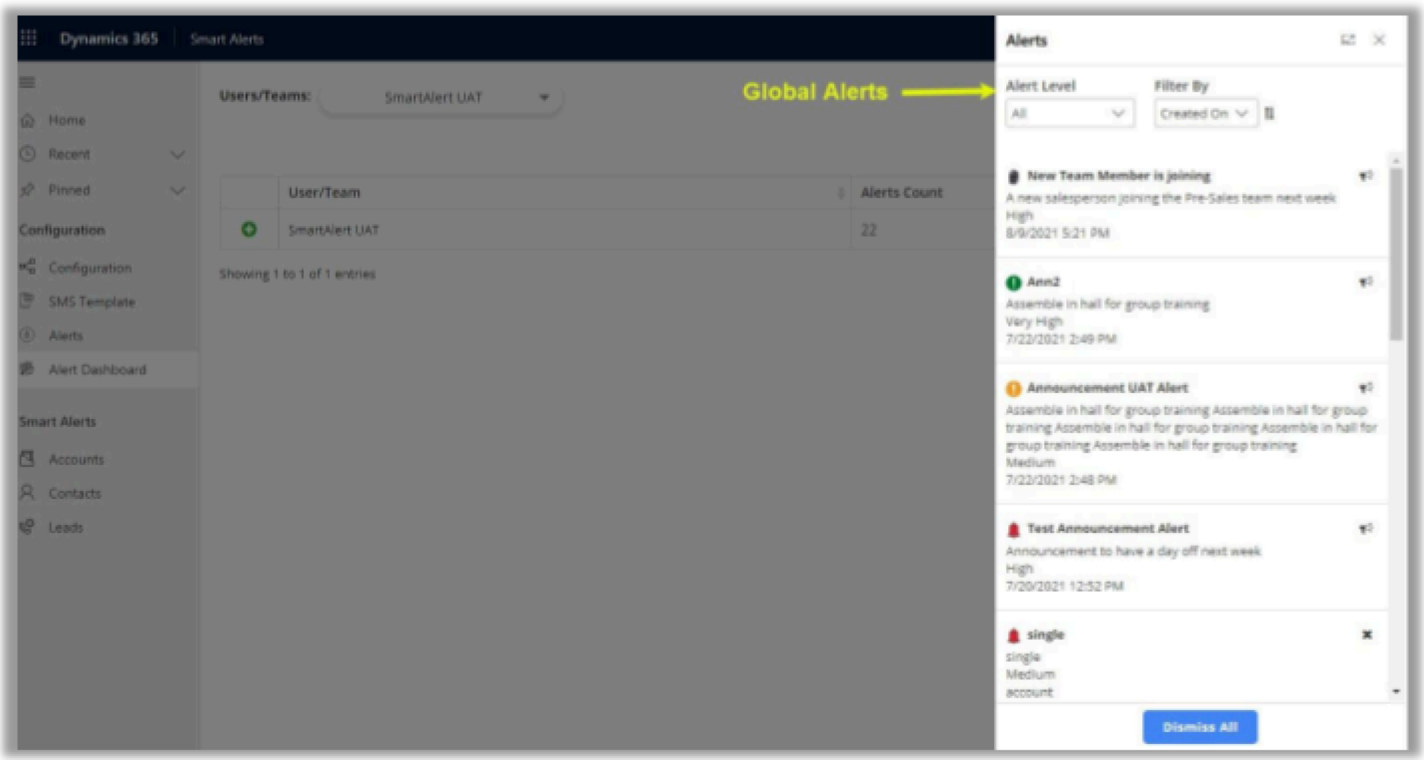
- Here you will get the Filter options to filter the alerts.

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**.



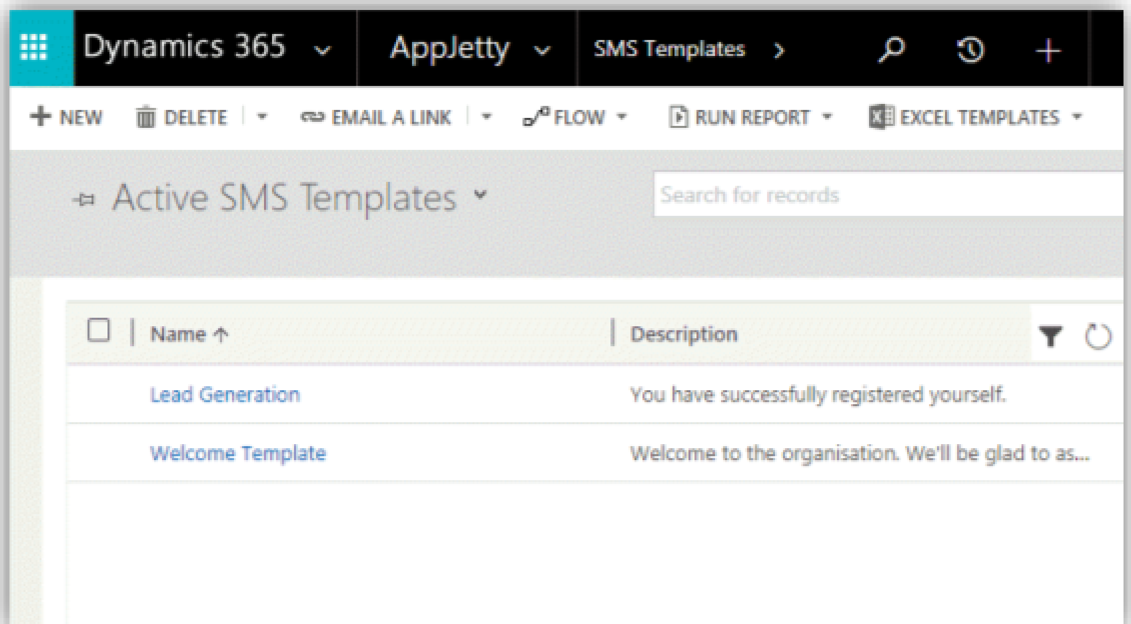
- Here you will get the Filter options to filter the alerts. You will get the default filter selected as per the app settings from the configuration.
- You can filter the alerts by the “Alert Level” and “Filter Value” (Filter By).

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**.



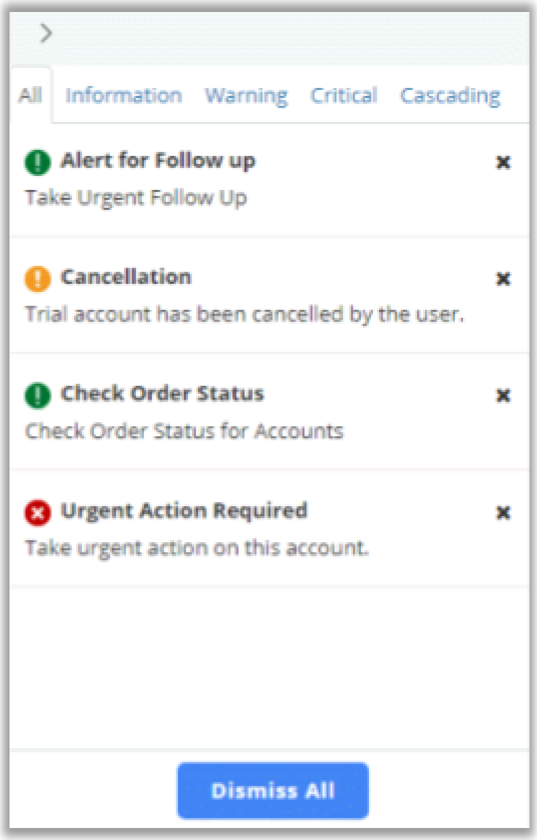
- On navigating to SMS templates, you can view the list of all created templates. You can create as many templates as you want by clicking on New button.

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

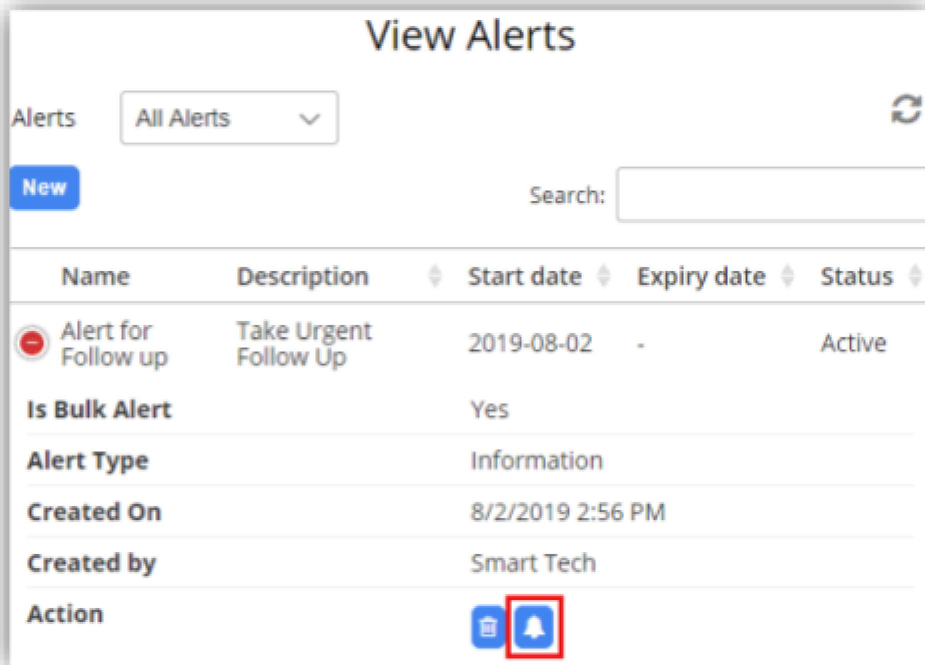
Track Alerts

- 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.

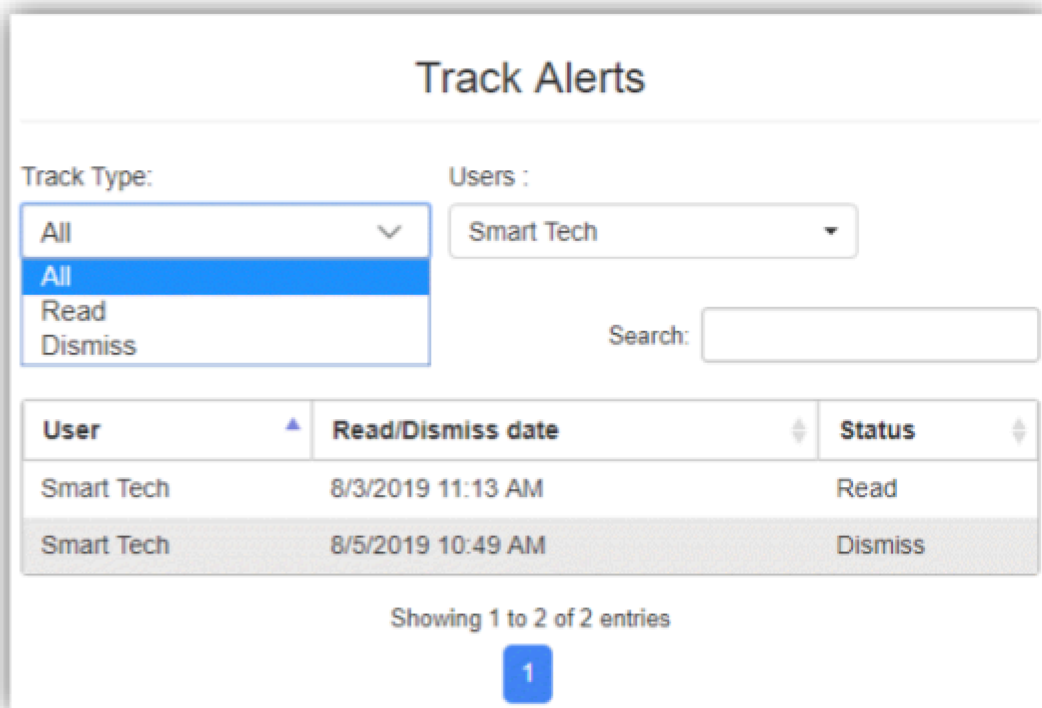
Note: Alerts that are not dismissed, are marked as read under alert track status.



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

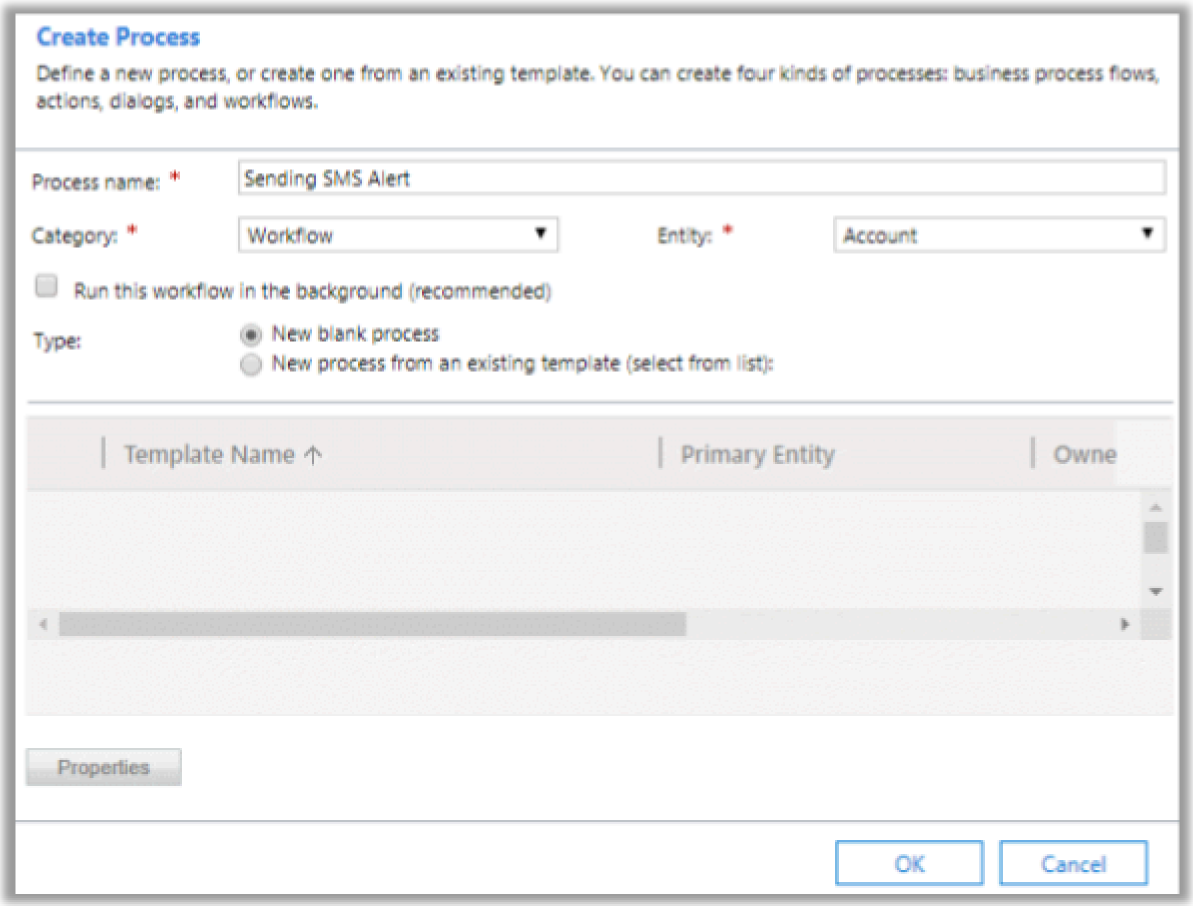


- Clicking on the icon, track alerts screen shows up that status of specfic alert. You can further filter results based on users or track status as required.

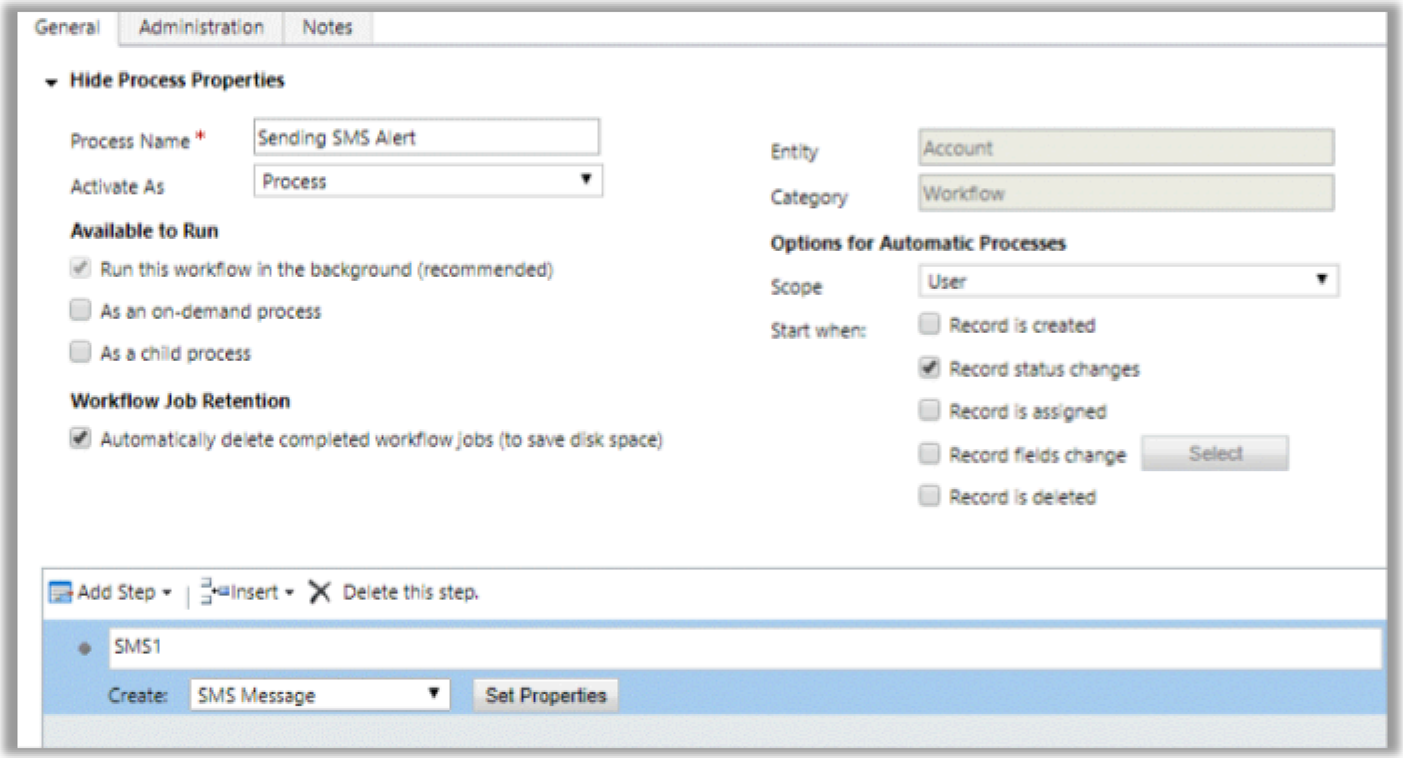


Send SMS via process

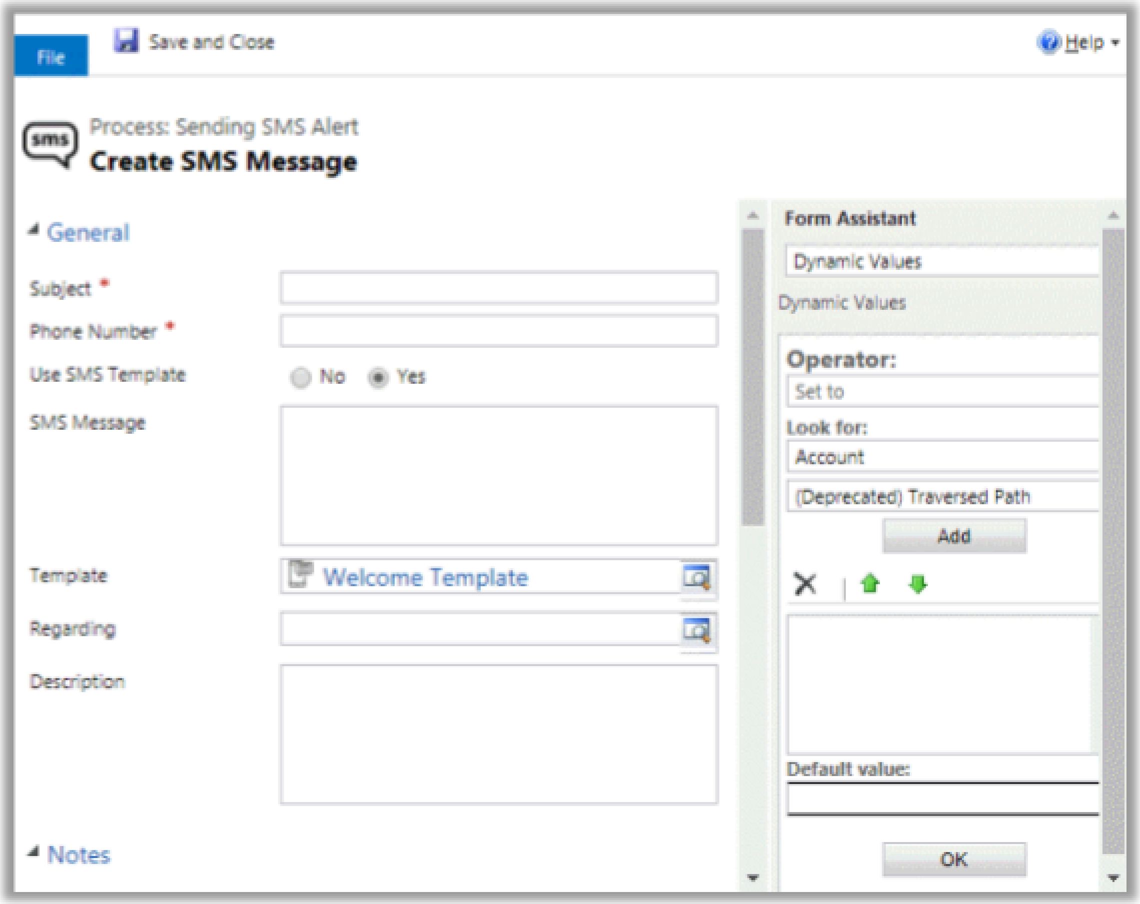
- To send SMS using workflow, you need to follow default “CRM flow” for creating workflows.
- Navigate to **Settings** **Processes**.
- Select New to create a new process. Enter valid process name, entity for which the process is being created and select Workflow as the Category.



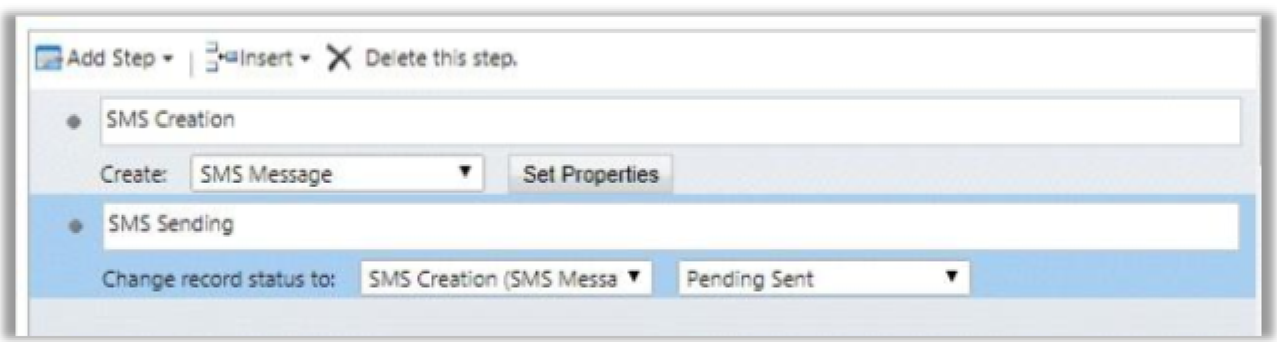
- Click on **OK** to proceed further.
- Here you may select the action as required for workflow to work.
- For SMS to be sent, you need to create a message record.



- 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.

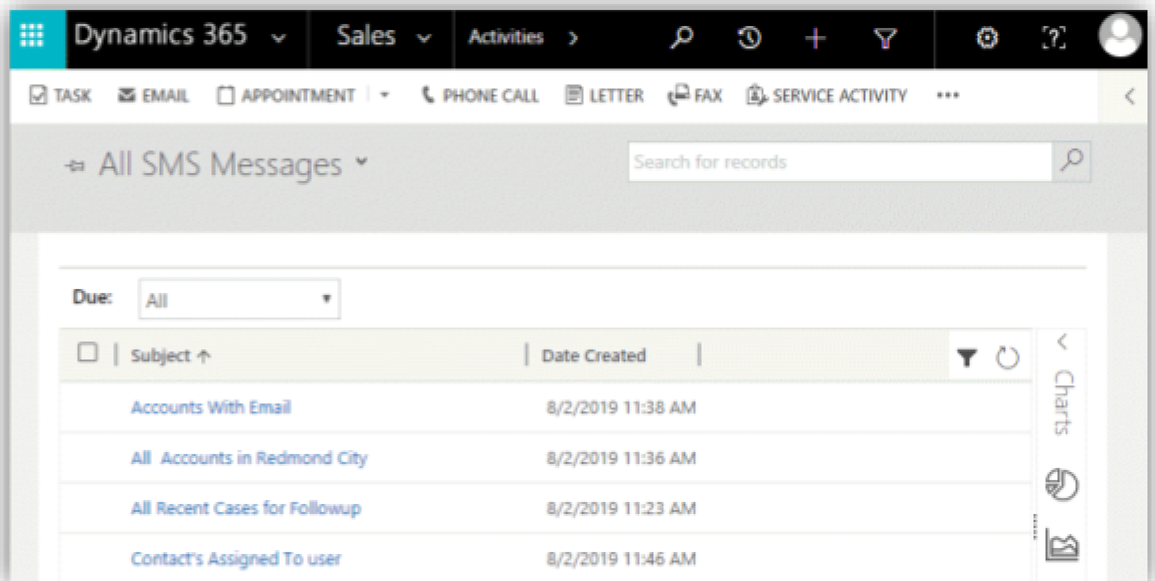


- You must also enter the SMS Message or select message based on SMS template. For SMS templates you can select template from the look up selection.
- This would just create SMS record, in order to send SMS message, another step needs to be created within the same workflow process that triggers sending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



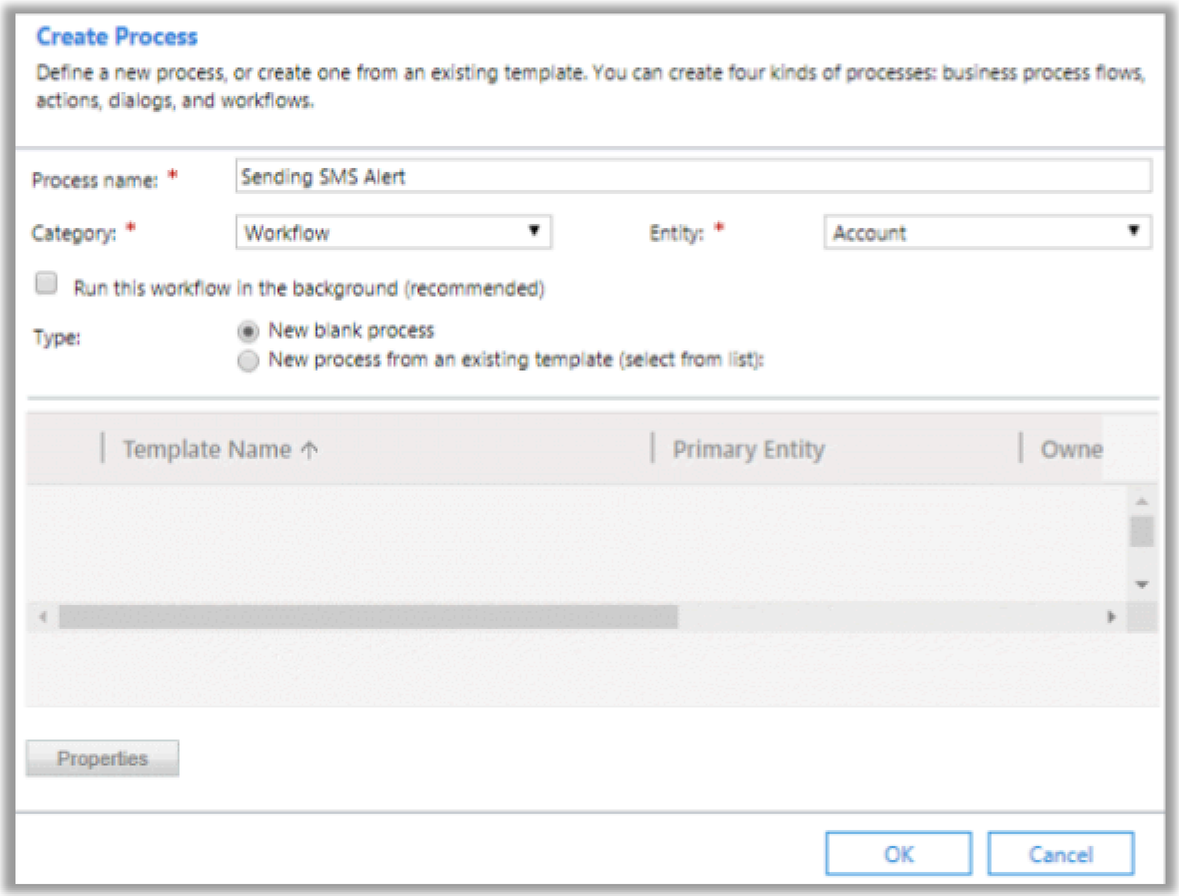
- On selecting **Change Status**, you need to select the entity for which status must be changed. Select SMS Message in first dropdown and select status Pending Sent in the second dropdown.
- Changing status of the SMS Message to Pending Sent will send the message.

- 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



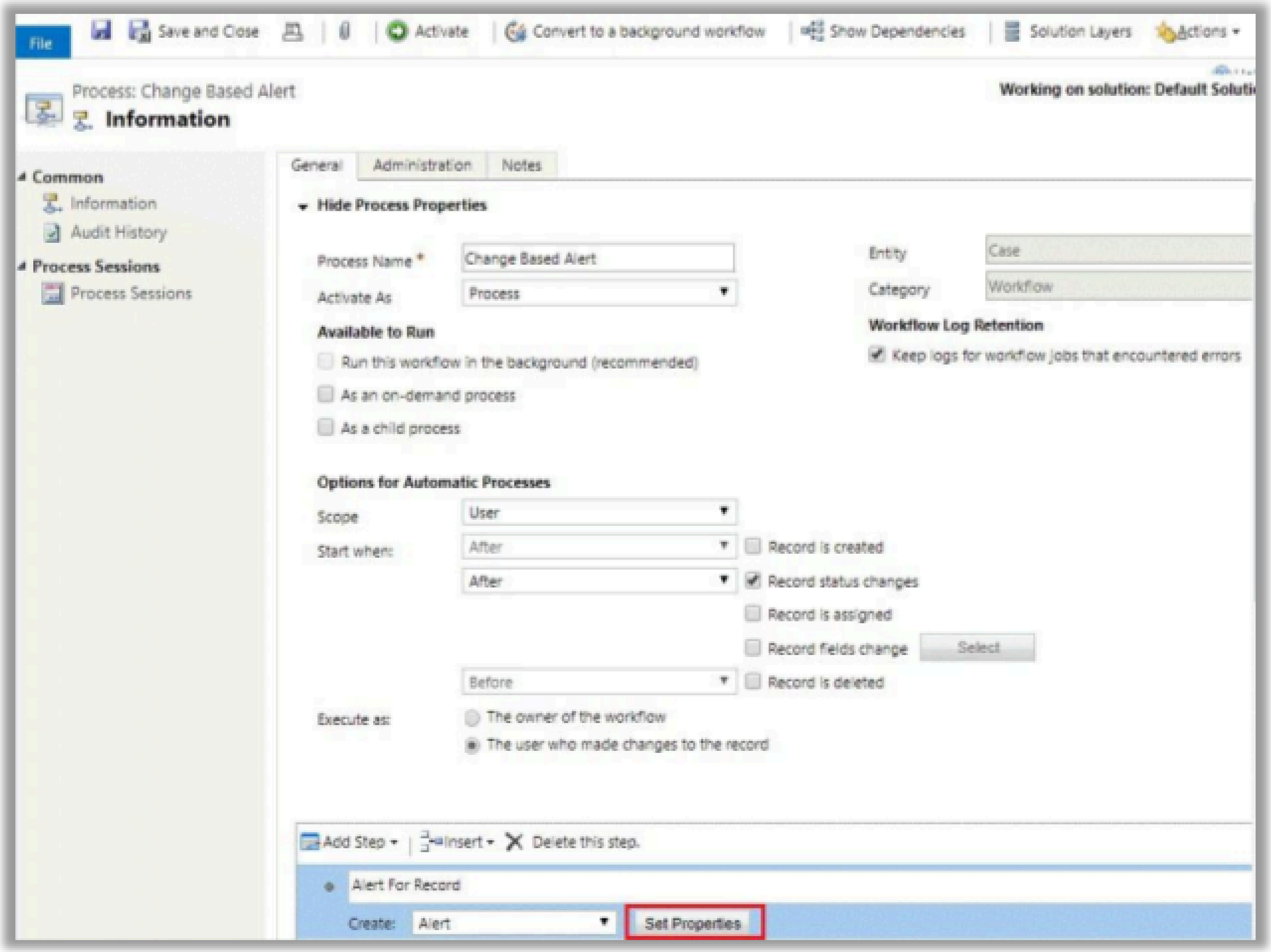
Send Alerts via process

- 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.

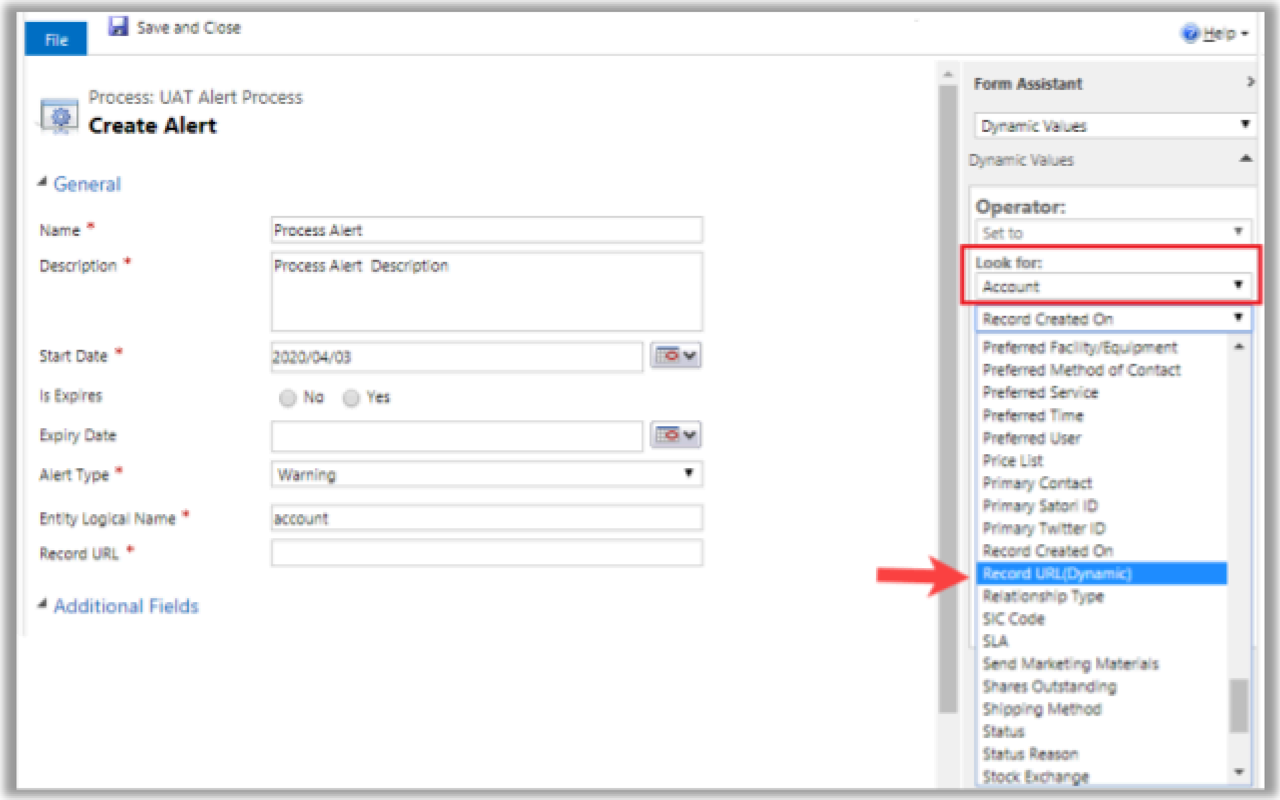


- Click on **OK** to proceed further.

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



- 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.

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

Tickets

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Customization:

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