Microsoft Dynamics CRM Platform

User Guide

CRM Versions Supported : CRM 2015 & Online

Alerts is a Microsoft CRM enhancement that allows Microso
CRM users to add critical data to CRM records so other user
immediately be aware of it upon accessing the CRM record.

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Product Overview

With MTC's Microsoft Dynamics CRM Alerts, users can be sure that the most important data about a record is read first by the user accessing that record. MTC Solutions Alerts is a Microsoft CRM enhancement that allows Microsoft CRM users to add critical data to CRM records so other users will immediately be aware of it upon accessing the CRM record. The features are:

- Add Bulk alerts from Advanced Find results or entity lists
- Users may add multiple alerts to each CRM record
- Users may provide optional alert expiration dates for alerts that only need to be shown temporarily
- Create and View Bulk Alerts instantly
- Deactivated alerts can be re-activated as needed
- Users may select alerts on any CRM record type
- Alerts are immediately displayed in a pop-up window when the record is accessed
- Developers may add, edit and remove alerts programmatically from custom applications
- Users may select alert type with icon so users will be able to quickly differentiate the type of alert and determine whether it requires their attention
- Alerts may be deactivated but will remain in the system so users may see past alerts for historical context

Alerts can be configured to work with the following CRM entities: Leads, Contacts, Accounts, Opportunities, Quotes, Orders, Invoices, Cases, Contracts, Campaigns, Custom entities.

Installation Process

To install the Alerts for Microsoft Dynamics CRM the following steps has to be followed

STEP 1:

- Go to http://www.dynamicsexchange.com/Alert.aspx click on Download to get Solution

STEP 2:

- On Downloading you will get Alerts_1_0_0_0_managed.zip (ZIP file).
- Extract the files from the downloaded folder. You will get two WINRAR ZIP files.

Alerts_1_0_0_0_managed.zip

Licensing_1_0_3_0_managed.zip

NOTE: To install the Alerts for Microsoft Dynamics CRM SOLUTION need to be imported into CRM

STEP 3:

- Open your CRM click on settings→solution→import it will open import Solution window.

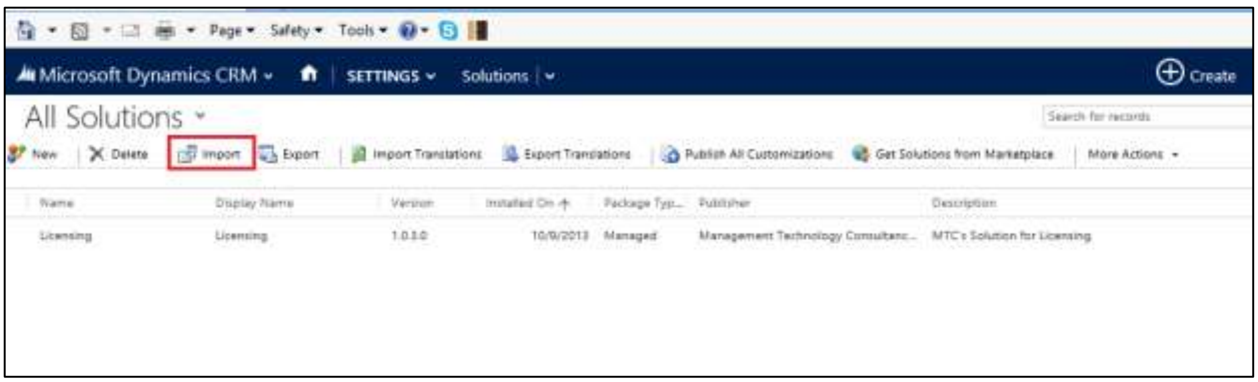


Figure 1: Import Solution

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.

Installing Licensing Solution

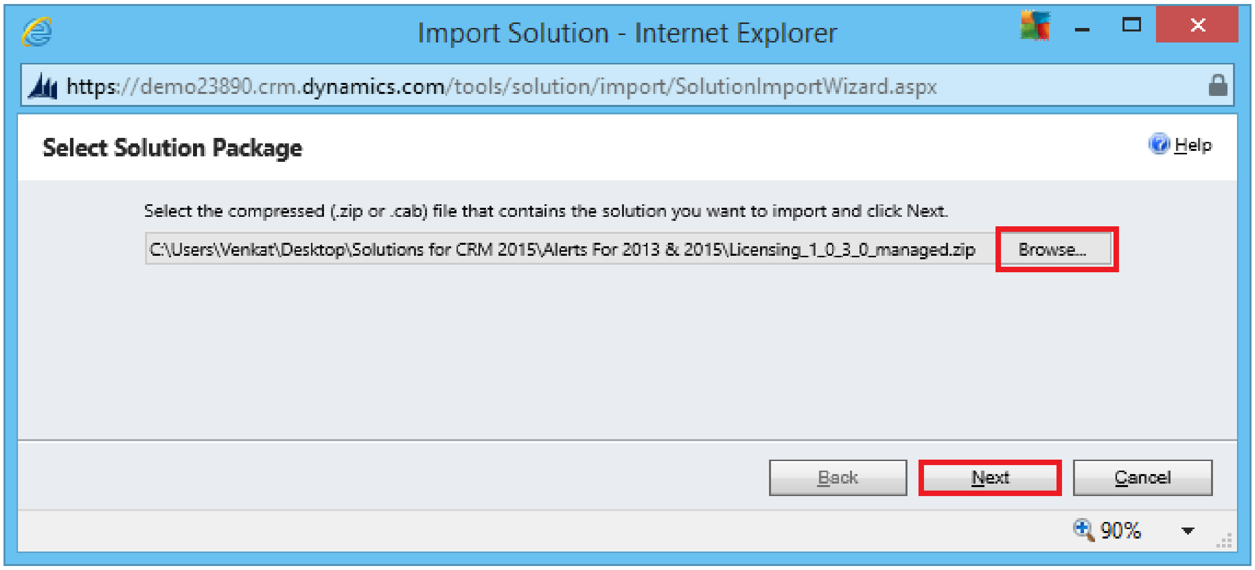


Figure 2: Select Solution Package

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.

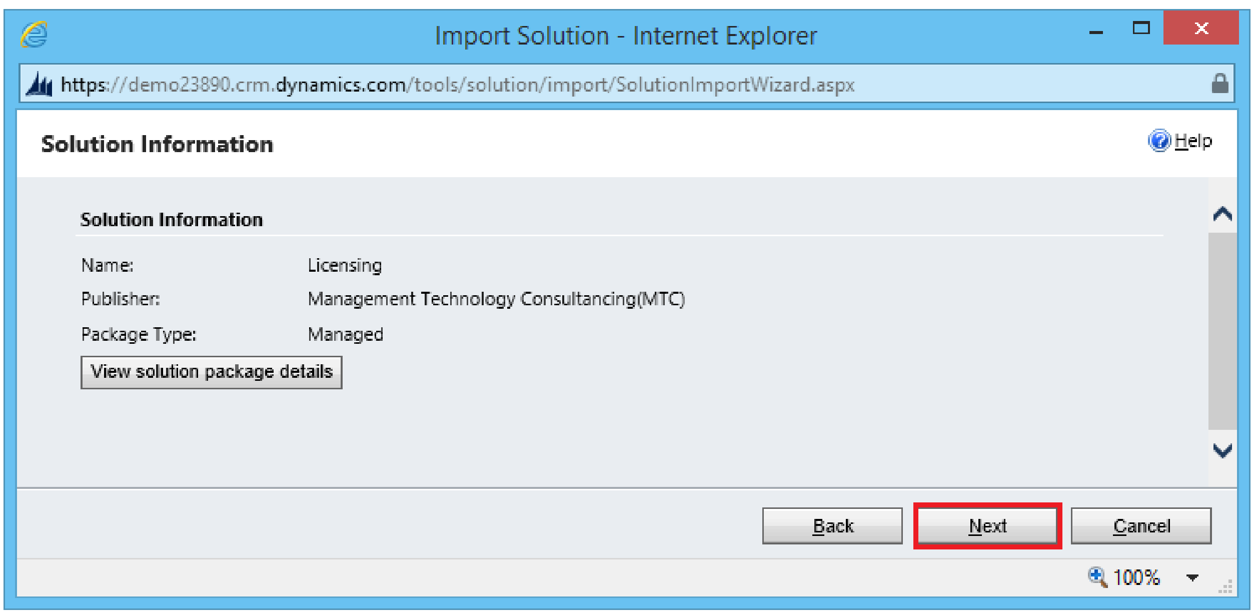


Figure 3: Solution Information

- Click on Next to proceed

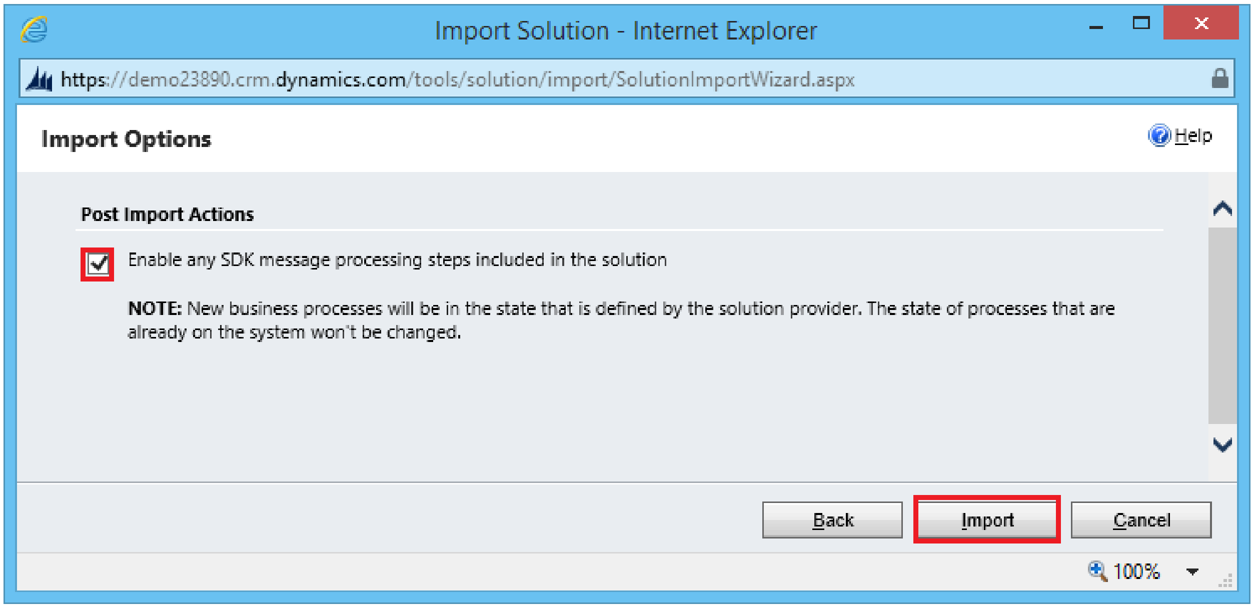


Figure 4: Import Option

- Click on Next to proceed

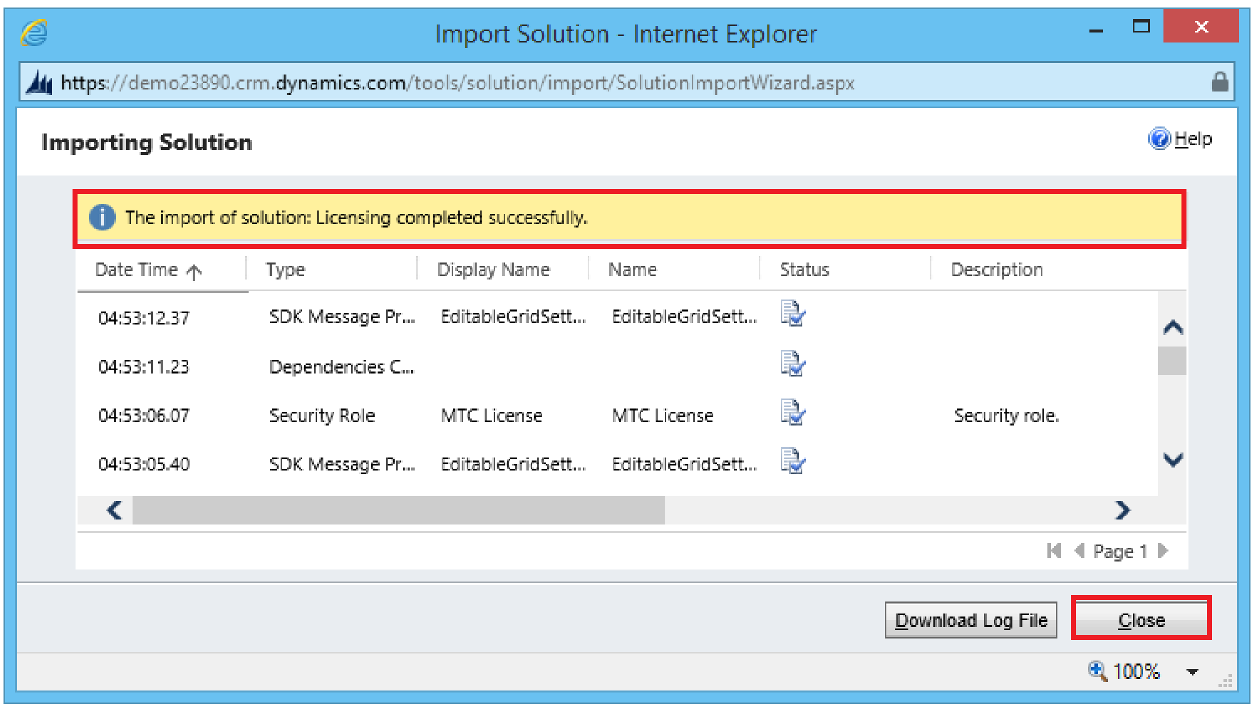


Figure 5: Importing Solution – Licensing

- Click on Close after successful completion message is displayed.

Installing Alerts for Microsoft Dynamics CRM Solution

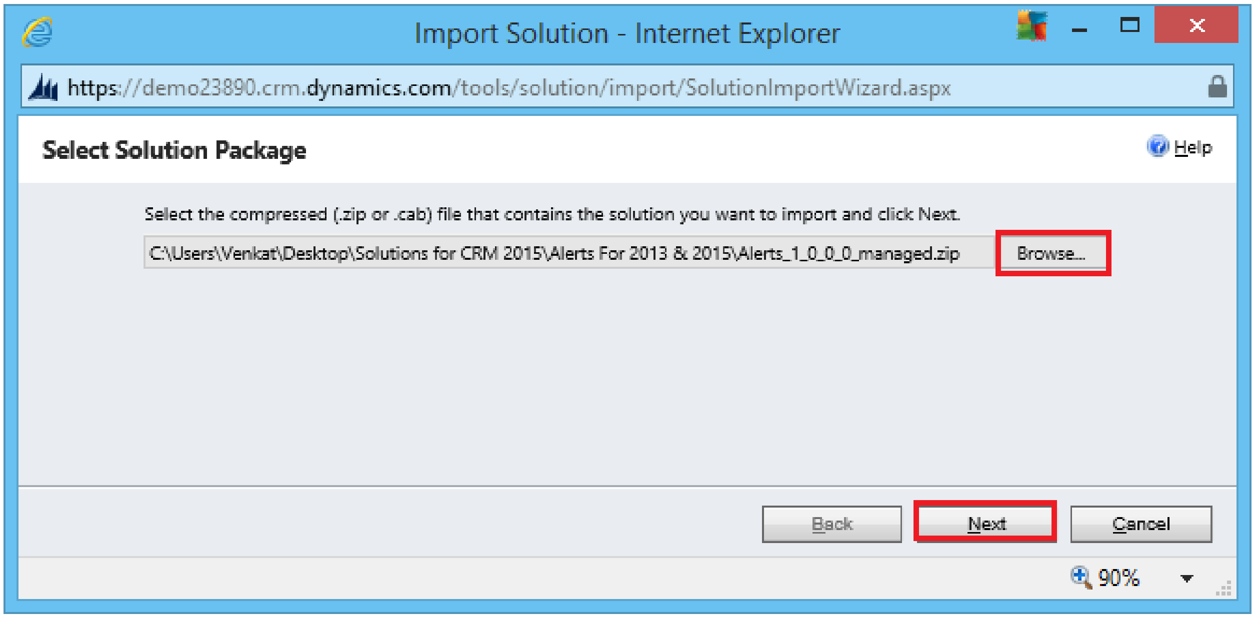


Figure 6: Select Solution Package

- Click on Next to proceed.

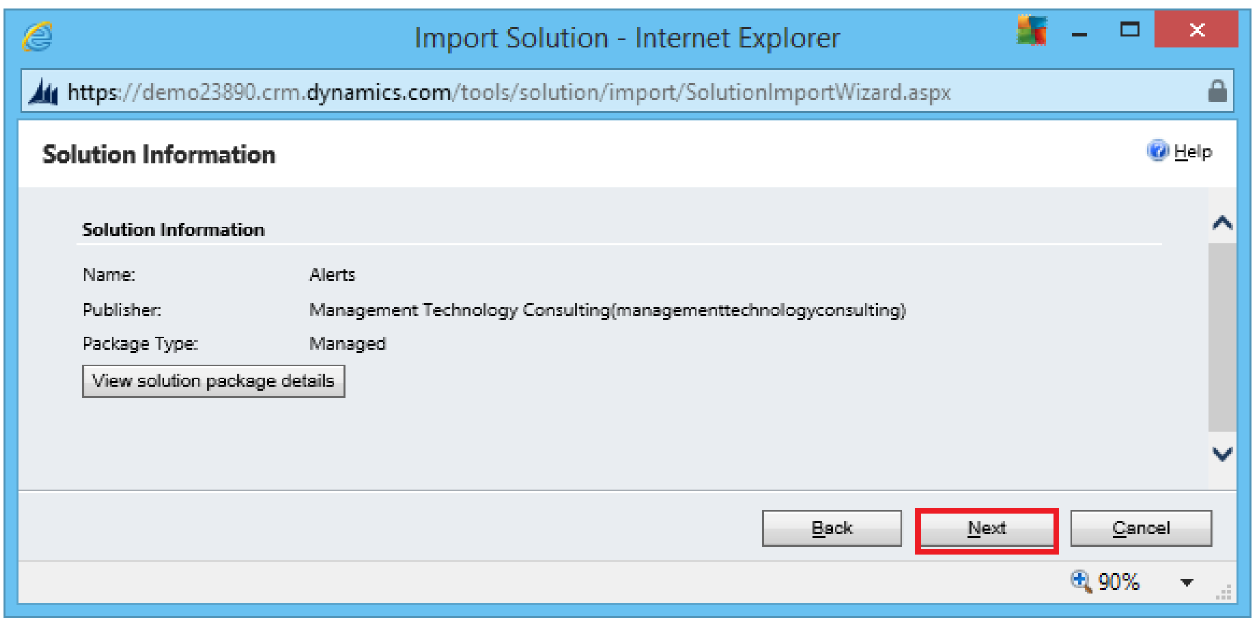


Figure 7: Solution Information

- Click on Next to proceed.

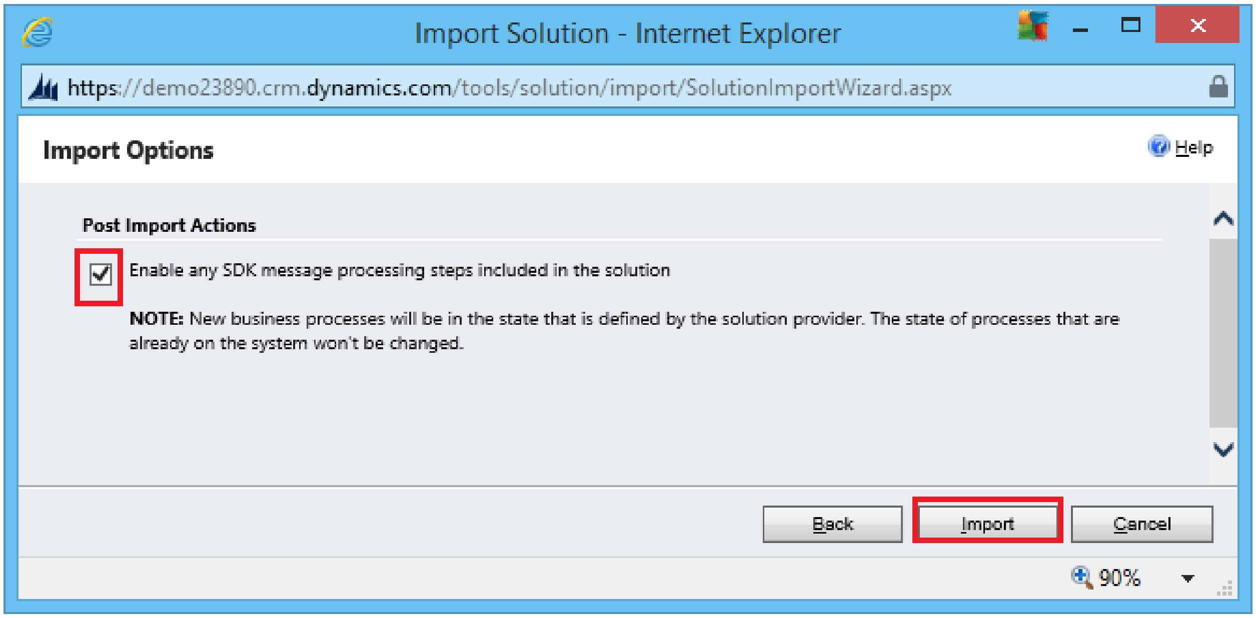


Figure 8: Import Option – Post Import Actions

- Click on Import to proceed.

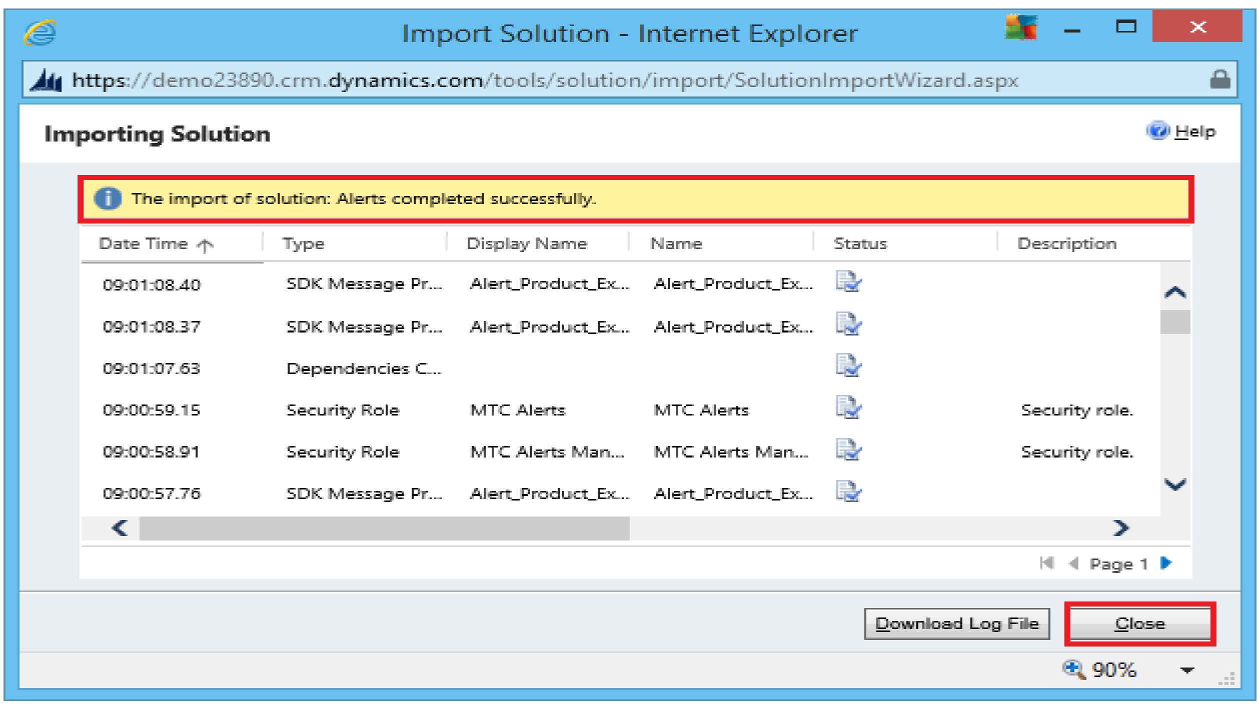


Figure 9: Solution successfully imported

- Click on Close after successful completion message is displayed.

How to get License Key

- To install Alerts for Microsoft Dynamics CRM you will require License Key, which you can get by sending an E-mail request to salesteam@mtccrm.com with your Organization Unique Name.

- To access your Organization Unique Name Click on **Settings→Customizations→Developer resources** as shown

Figure 10: Developer Resources

- A window will pop up with Organization Unique Name as shown

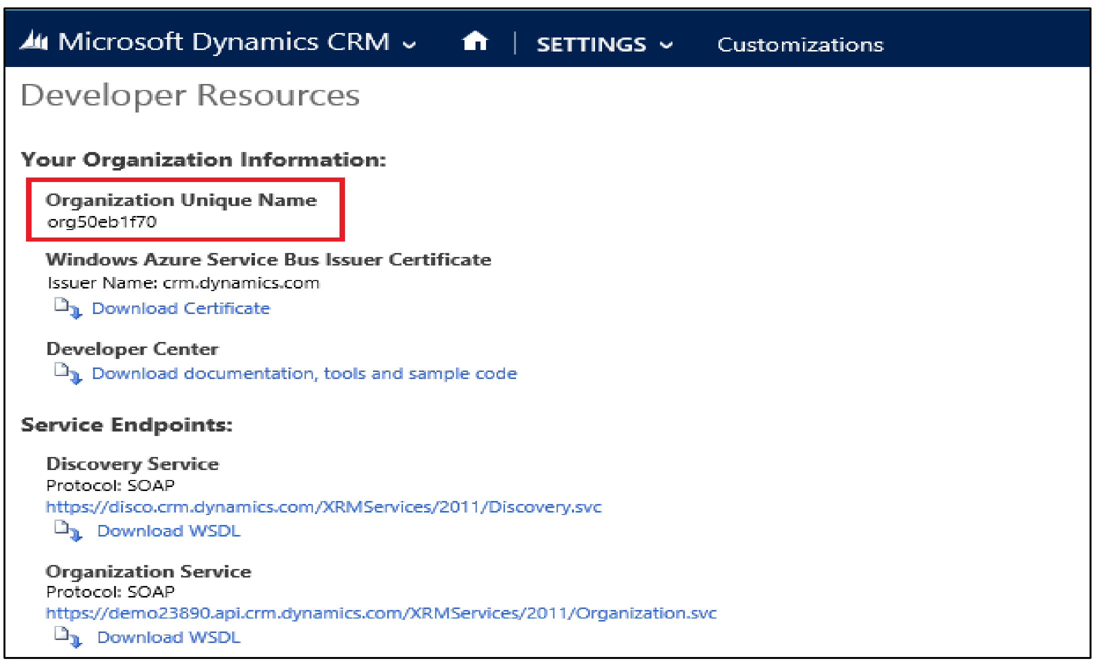


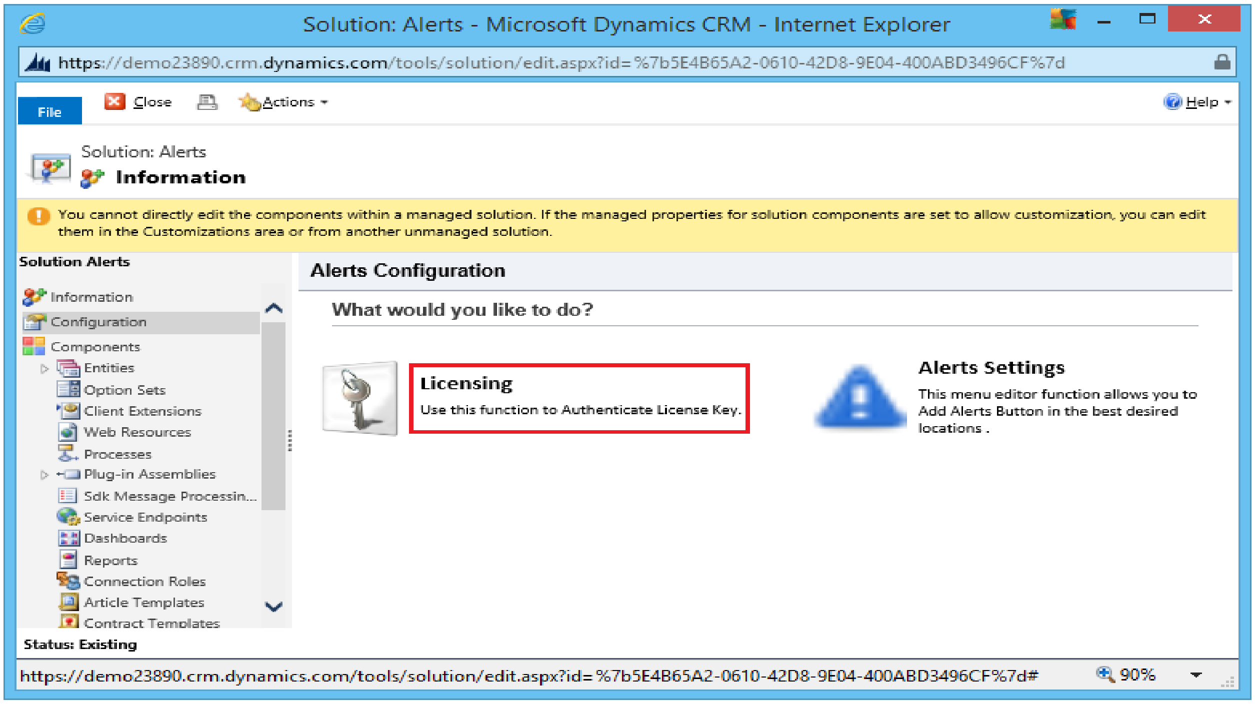
Figure 11: Organization Unique Name

- Send this Organization Unique Name through Email to salesteam@mtccrm.com and you will receive your Licensing Key within 24 hours.

NOTE: After placing the request, you will receive the LICENSE KEY within 24

Placing License Key

- **CRM->Settings->Solutions->** double click on **Alerts** Solution



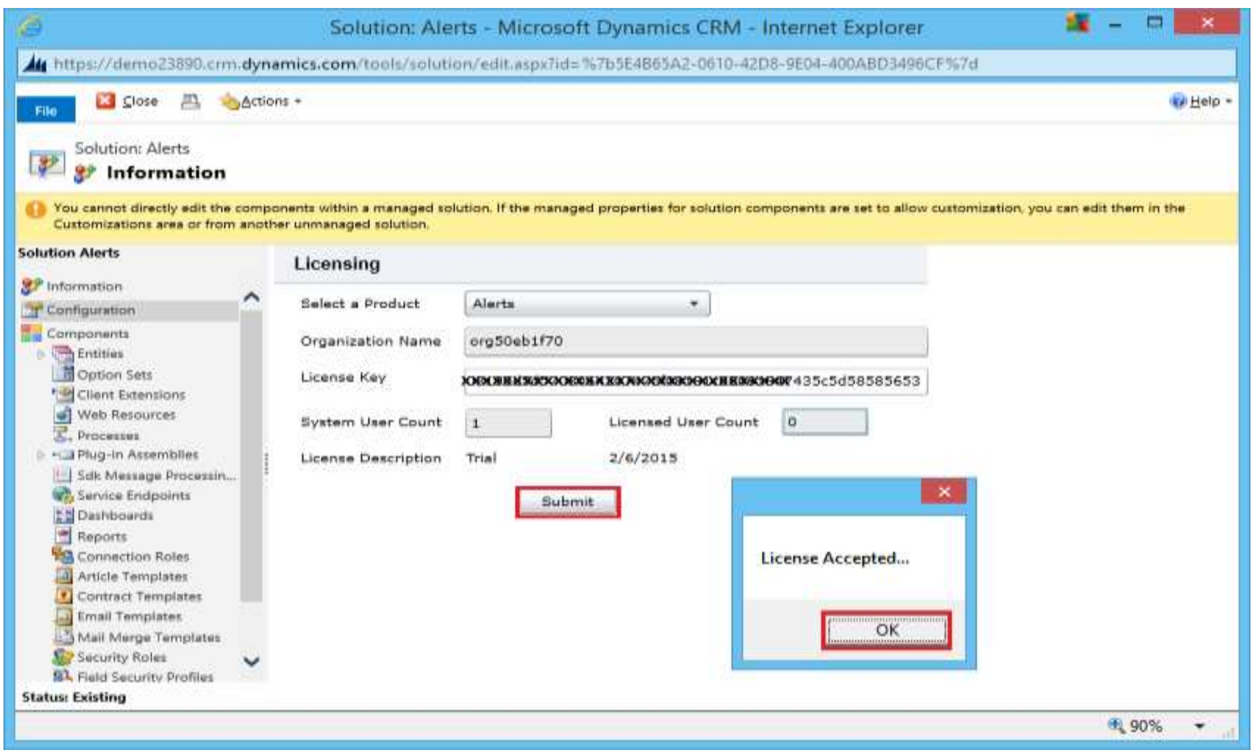


Figure 12: License Key for CRM Alerts

- Select Product as Alerts
- Copy & Paste the License key which you have received from salesteam@mtccrm.com
- Click on Submit
- A pop up window appears and displays the message as License Accepted. Click on OK.

Configuring Alerts

- **CRM->Settings->Solutions->** double click on **Alerts Settings** Solution as shown below

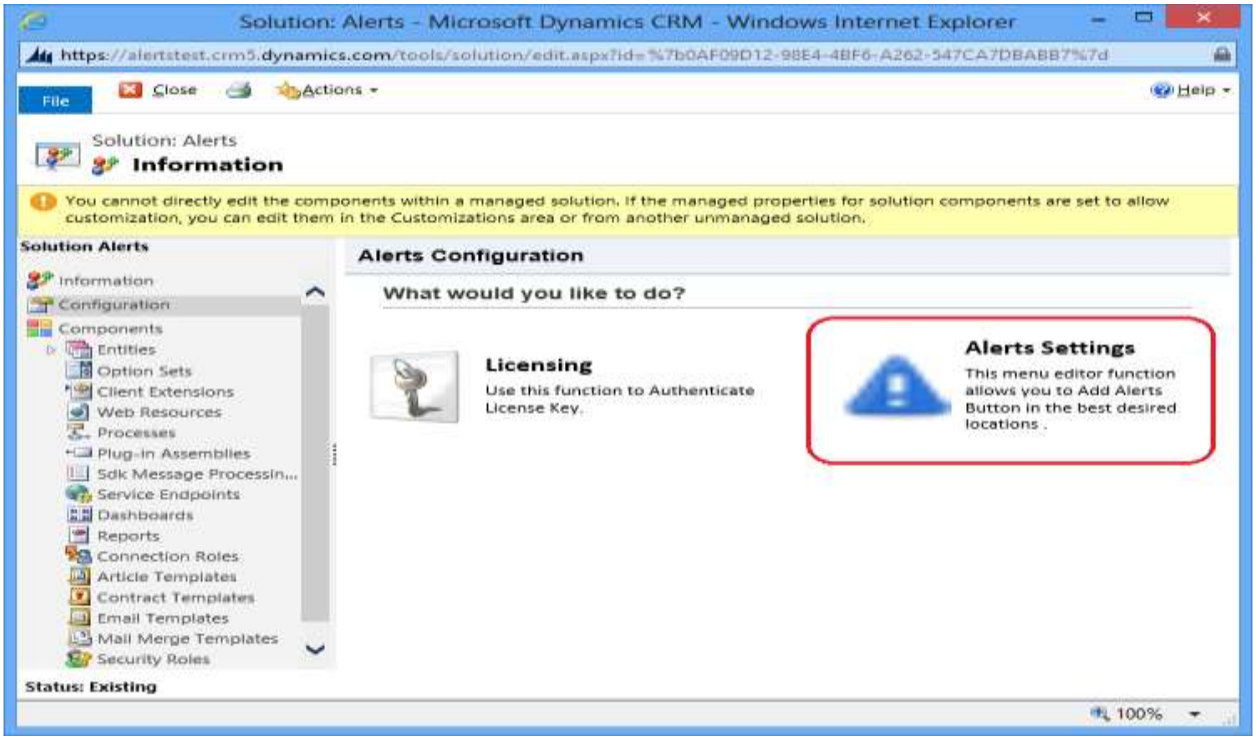


Figure 13: Alerts configuring Screen

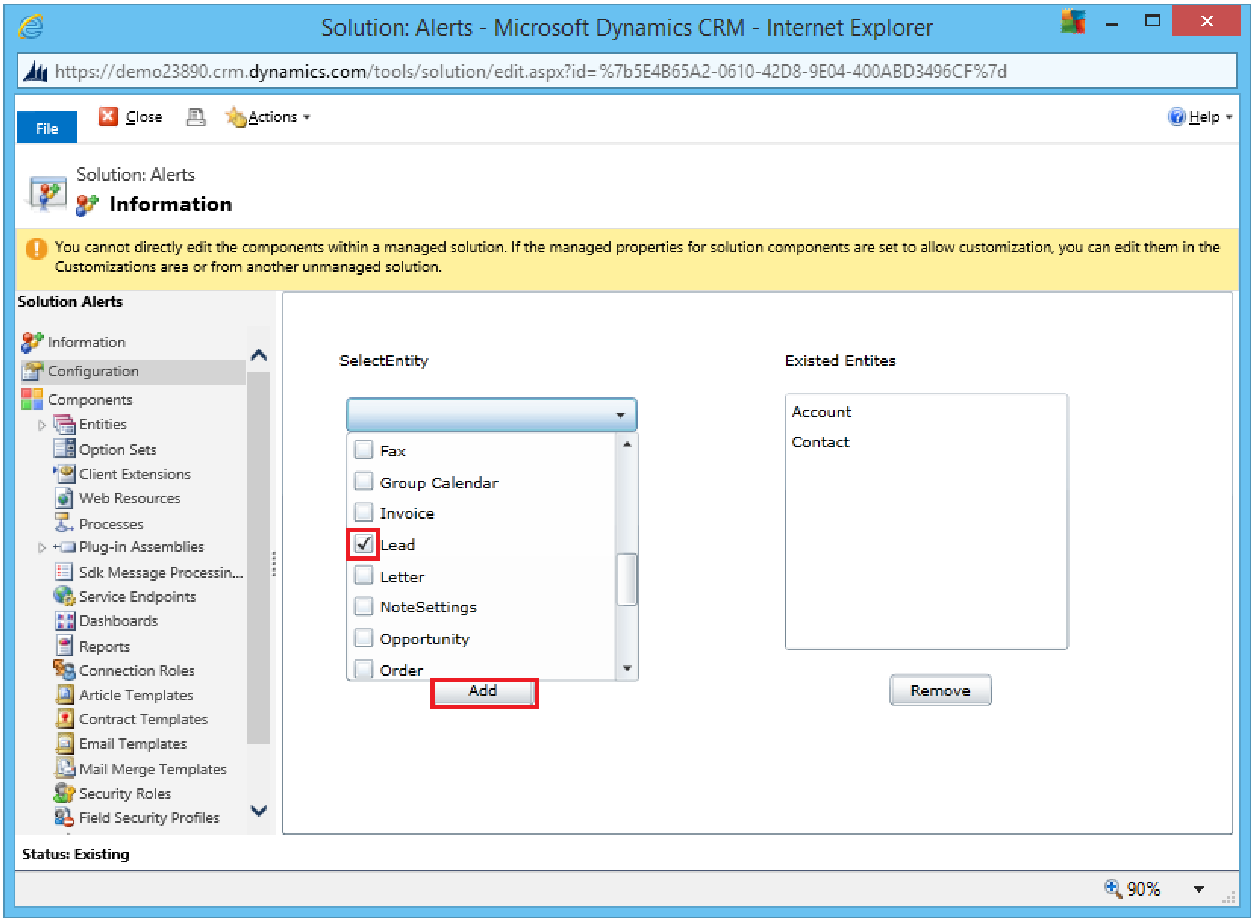
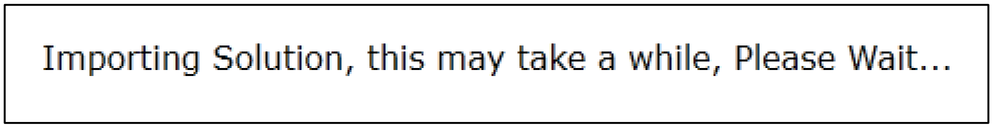


Figure 14: Select Entities for Alerts

- Select the Entity that you wish to select to have an Alert function from the drop down list provided (as shown above)
- Select one or more entities by clicking the check box and finally click on Add button
- On click of Add button a message is displayed as shown below and after a while all the selected entities are shown in Existed Entities list



Security Role Privileges

Security Roles are a standard function of Microsoft Dynamics CRM and Alerts is compliant to the privileges controlled by Security Roles. Your User's access privileges to add or "Create" records and modify or "Write" records from Alerts can be controlled by the Security Role functionality explained briefly here and in CRM guides and "Help".

A security role defines how different types of records can be accessed by one category of users, such as all salespeople. To control access to data, you can modify existing security roles, create new security roles, or change which security roles are assigned to each user. Each user can have multiple security roles.

Security role privileges (A user's rights to perform specific actions on specific record types or to perform tasks. Privileges are assigned by system administrators to security roles. Users are then assigned security roles. Examples of privileges include Update and Publish Customizations.) Are cumulative: when a user has more than one security role, the user will have any privilege allowed in any of the assigned security roles.

- You can set your own guidelines for Security Roles privileges, Navigate to **Settings →** **Security →Users** as shown below

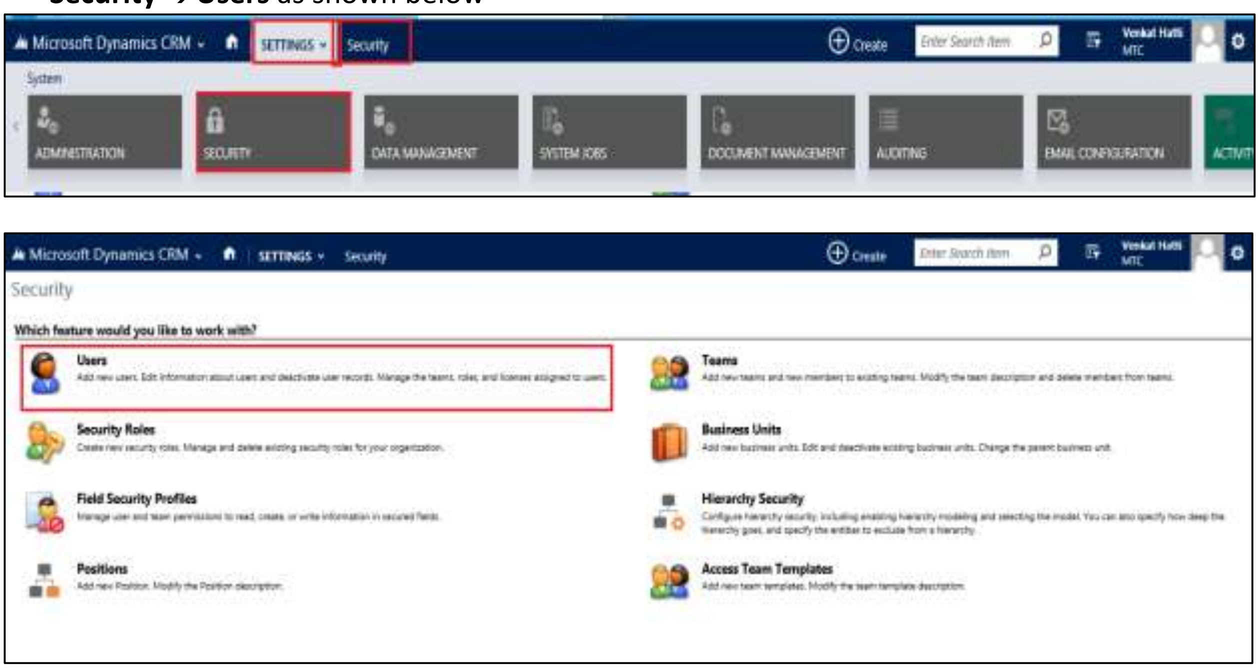


Figure 15: Security Window

- It opens a new window with a list of **Enabled** User as shown in Figure.
- Select the check box of user name to make a modification, which opens a new window, click on Manage Roles in the ribbon as shown

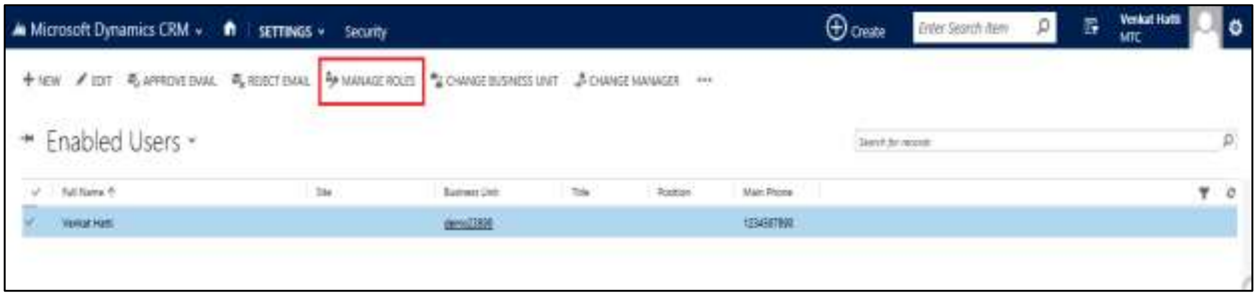


Figure 16: List of Enable Users

- A new window will open as shown.
- Select the role as "**MTC Alerts**" or "**MTC Alerts Manager"** and **"MTC License**" and click on **Ok** to assign the role to the user.

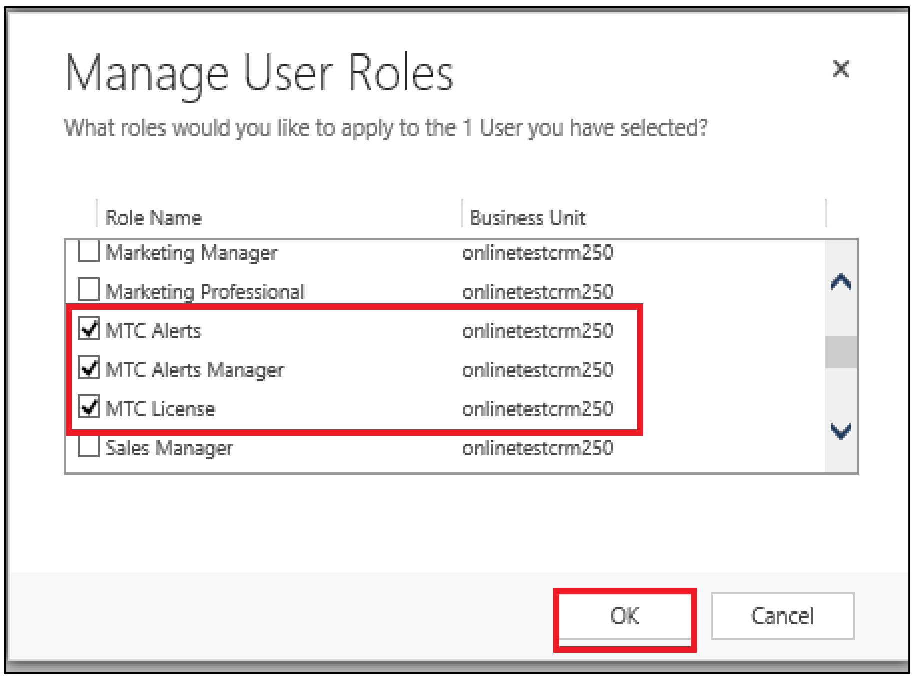


Figure 17: Manage User Roles

Note:

MTC Alerts - This User Roles has all the facilities as a regular user to use the functionality. But will not be able to create, or Delete records.

MTC Alerts Manager - This User Roles has all the facilities and can create, or Delete records.

MTC License – This enables to Alters functionality to use the licensing facility.

Functionality of Alerts

- **CRM->Sales->Accounts->** click on any account you wish to open the record
- If there are no pop-up alerts for this particular record then only the record gets displayed or else the pop up message is displayed first.

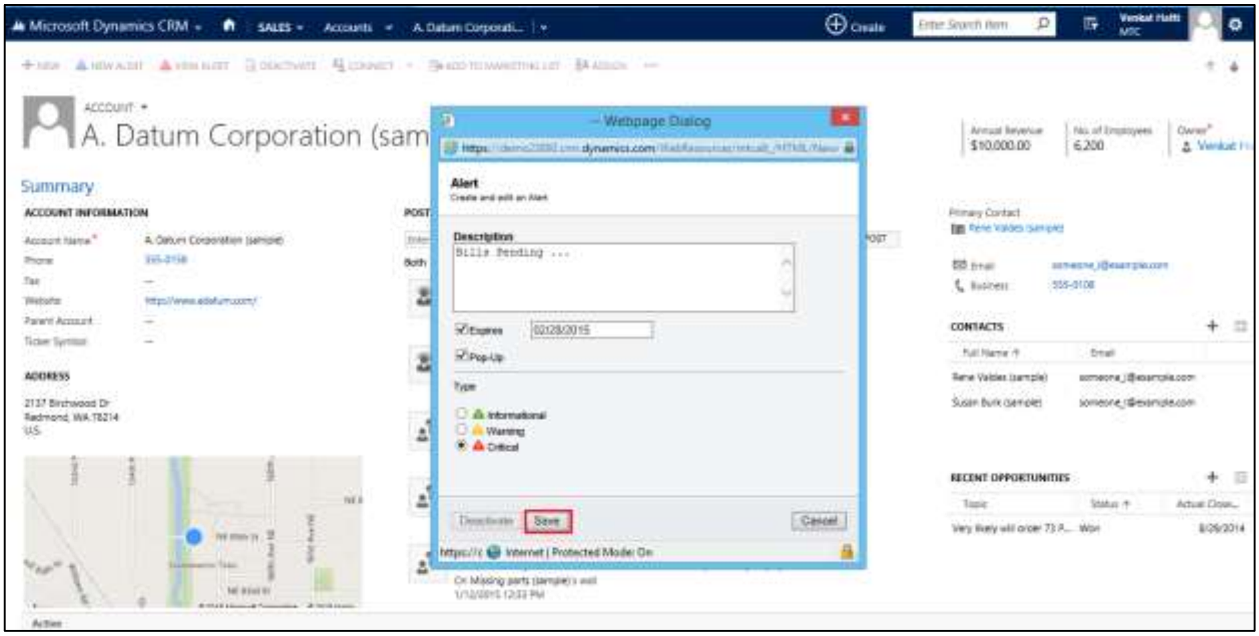
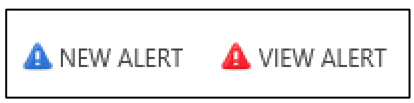


Figure 18: New CRM Account record with Alerts setting

- There are two button on the top of the form such as 

NEW ALERT

- Now to create a New Alert clock on NEW ALERT and the pop up opens as shown below

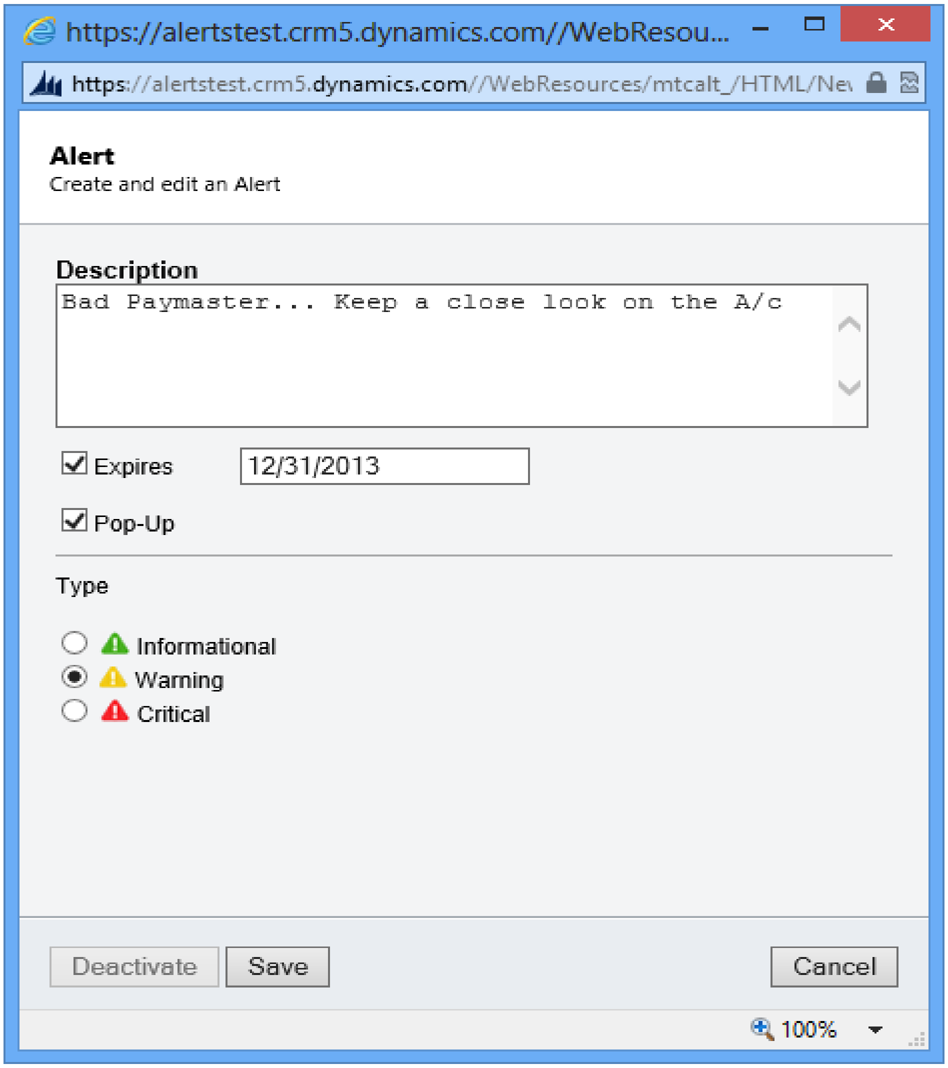
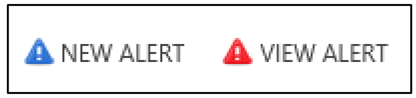


Figure 19: Alerts Creation screen

- Enter the Description
- If the Alert you wish to keep as time bound then Click Expires and select the date from calendar
- If you wish to have this alert message as Pop-up (means whenever you access the record a pop up message) is displayed
- Select the type (Category) of alert – Informational / Warning / Critical
- Click on save button to save the Alert.

VIEW ALERT

- When the account record is open and if you select 

View Alert button on the top of the CRM page then the following screen is displayed

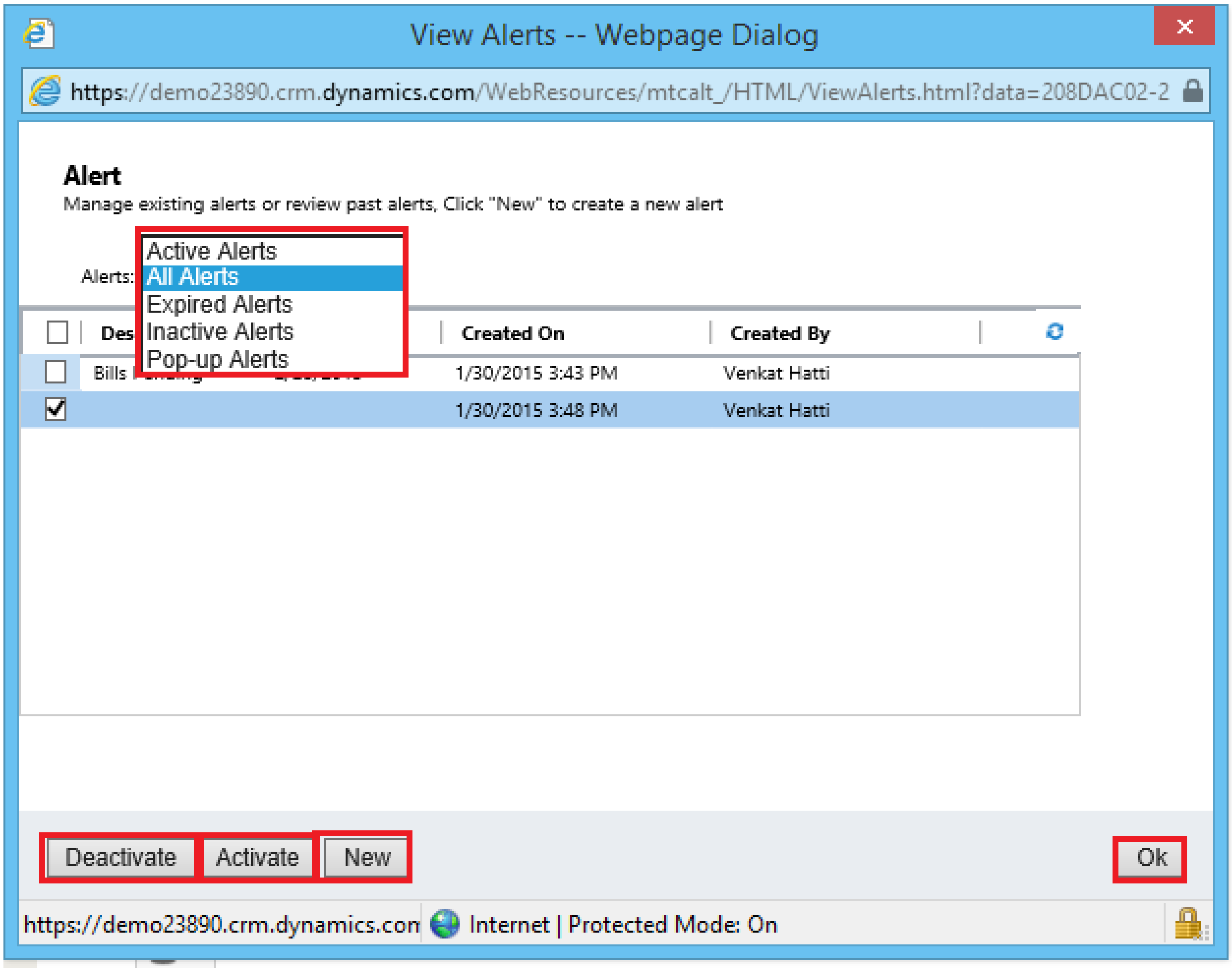


Figure 20: View Alerts Pop up screen

- Able to Select all kinds of Alerts from the Drop down list
- List all Alerts pertaining to the Selected record Entity
- Able to Activate or Deactivate Alters by clicking on the appropriative button
- When you open a record which has already a pop up alert, it displays as shown below

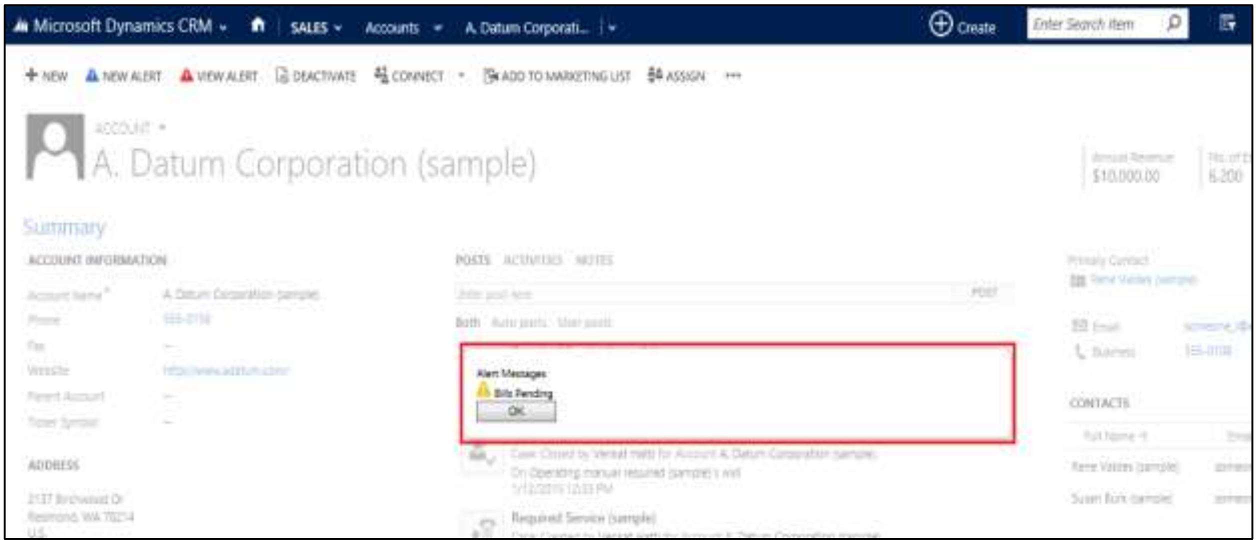


Figure 21: CRM screen showing the pop up Alert

BULK NEW ALERTS

Open **CRM->Sales->Accounts**

- Select multiple Accounts as you wish – as shown below
- Click on  to create New Alerts for all selected Accounts
- A pop up Webpage Dialog box opens as shown below

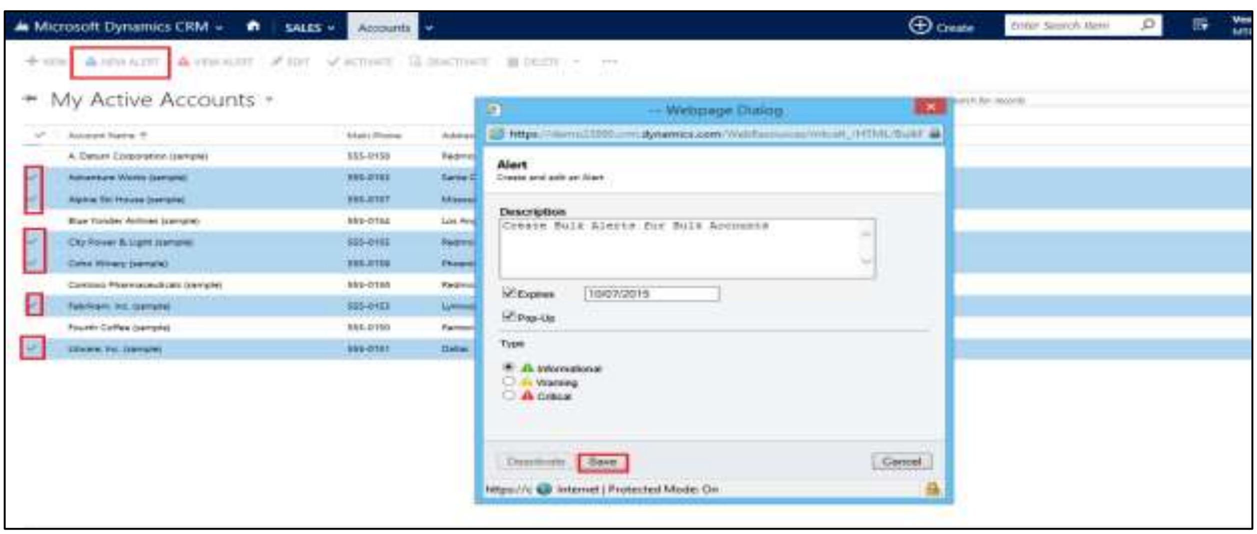


Figure 22: Creating Bulk Alerts

- Create / Input Description, and other details like Expires, Pop up and type
- Click on Save to save the Alerts

BULK VIEW ALERTS

Open **CRM->Sales->Accounts**

- Select multiple Accounts as you wish – as shown below
- Click on VIEW ALERT to view all Alerts for all selected Accounts
- A pop up Webpage Dialog box opens as shown below

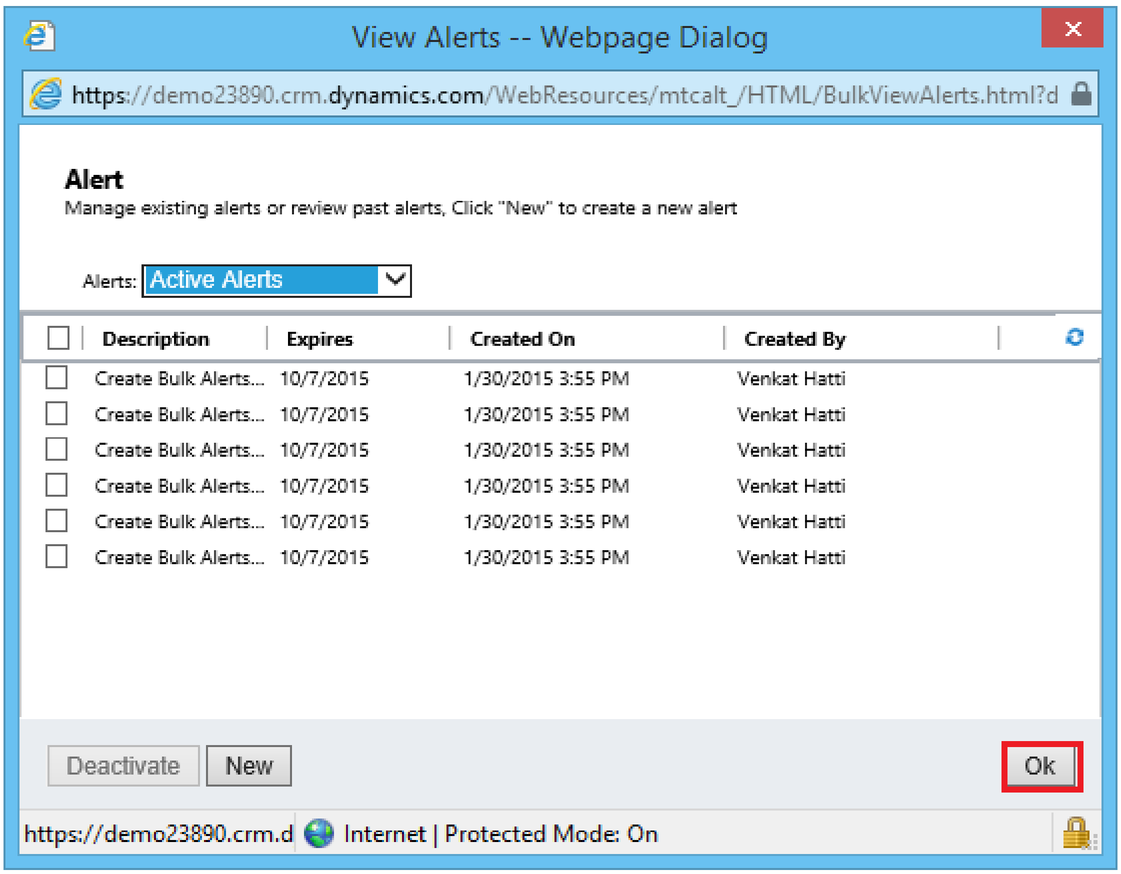


Figure 23: View Bulk Alerts

- All Alerts pertaining to Selected Account Records are displayed.
- Filter the Alert types as Active / Inactive from the Dropdown list provided
- Finally Click on OK to close the dialog box

Uninstallation Process

- To uninstall Alerts Solution, Navigate to **Settings → Solutions** → Select the check box Alerts then click on Delete as shown below

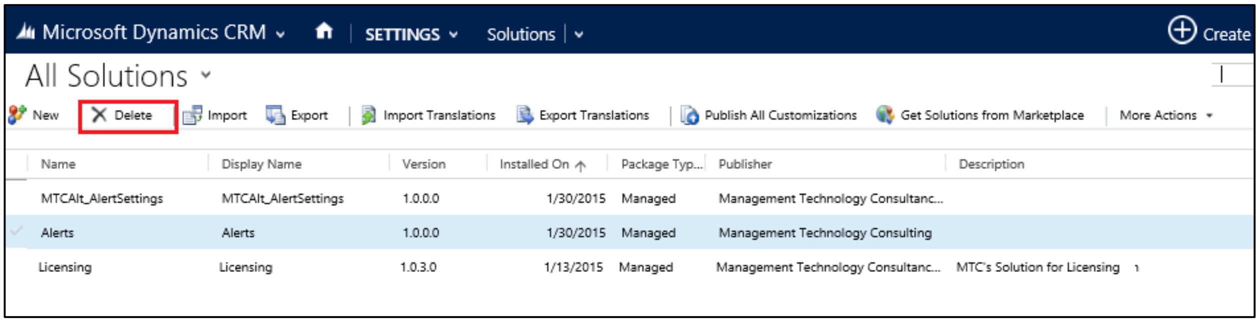


Figure 24: Uninstallation process

- Click on OK to delete the solution from CRM. The solution will be deleted

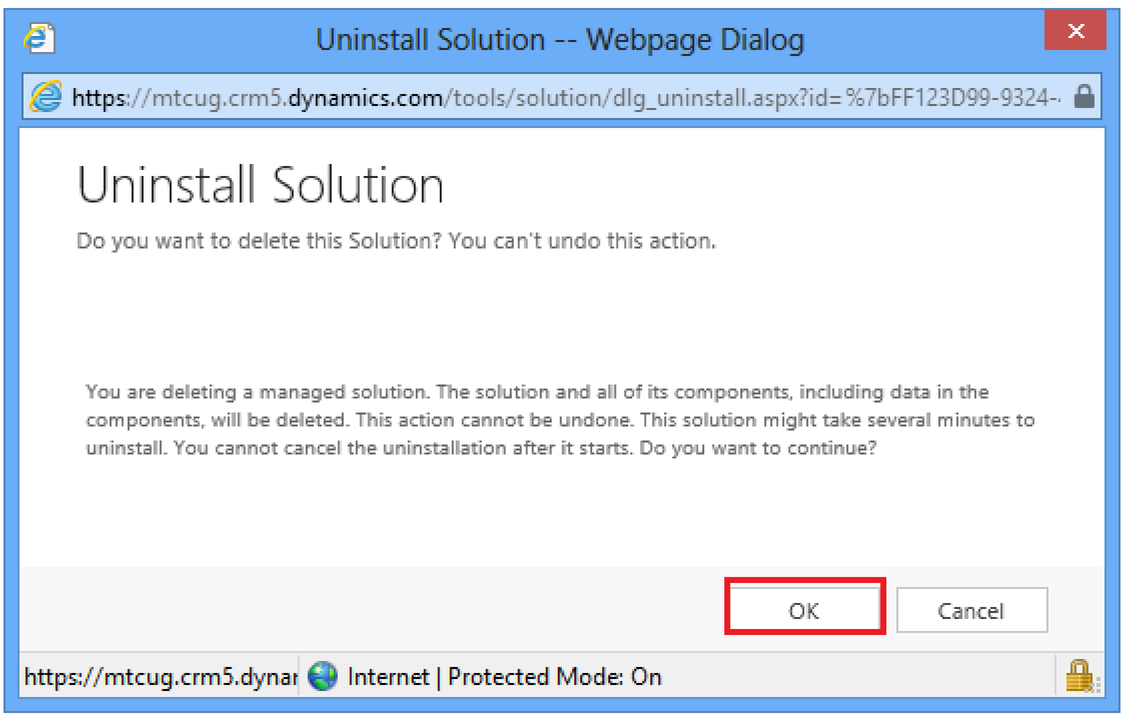


Figure 25: Uninstall Solution

- Repeat the process to uninstall Licensing Solution also.

MTC Overview

MTC develops an ever growing and extensive family of add-on products, complete solutions, and core development technologies for the Microsoft Dynamics CRM platform. MTC supports a product development effort with a highly efficient global Microsoft CRM exclusive services business 24/7. MTC's products represent the refinements in functionality, deliverability, and long-term maintainability of unique highly customized Microsoft Dynamics CRM platform business solutions suggested as most important in MTC's global volume customization business. MTC runs its internal operations and many of its partners and affiliates with this example

Small and medium sized businesses (SMB) can now affordably build the kind of enterprise automation system that distinguishes the best unique-line-of-business enterprises on earth. MTC uniquely delivers a very-unique service of clear value to businesses globally seeking automation as a business advantage.

SMB Custom Enterprise is your business's exact fit for a complete low cost business-specific companywide automation solution - marketing to operations to accounting in a closed loop - built on the Microsoft Dynamics XRM platform technologies. Starting with the Microsoft CRM platform in either a monthly Online or wholly owned on premise implementation you choose from a large and growing set of packaged option functionality where you determine what non-standard additional functions you want on this solution, then add them.

For more information on the dozens of integrated products of the "SMB Custom Enterprise" solution set visit: www.MTCCRM.com MTC's low-cost and fixed-rate professional services current rate schedule: www.MTCCRM.com/MTC_Services.pdf.

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MTC is a Microsoft Independent Solution Vender working on Microsoft CRM since the introduction of the platform. MTC's product offerings include development technologies for the Dynamics CRM platform, add-on enhancements of features and major functions to CRM, as well as complete vertical-market Enterprise versions of Dynamics CRM serving an every growing list of industries and organization types.

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Availability and hours of operation: Monday to Friday
USA PST 323-851-5008 - 8:00 AM to 6:00 PM
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