



Alerts for Microsoft CRM 4.0

User Guid

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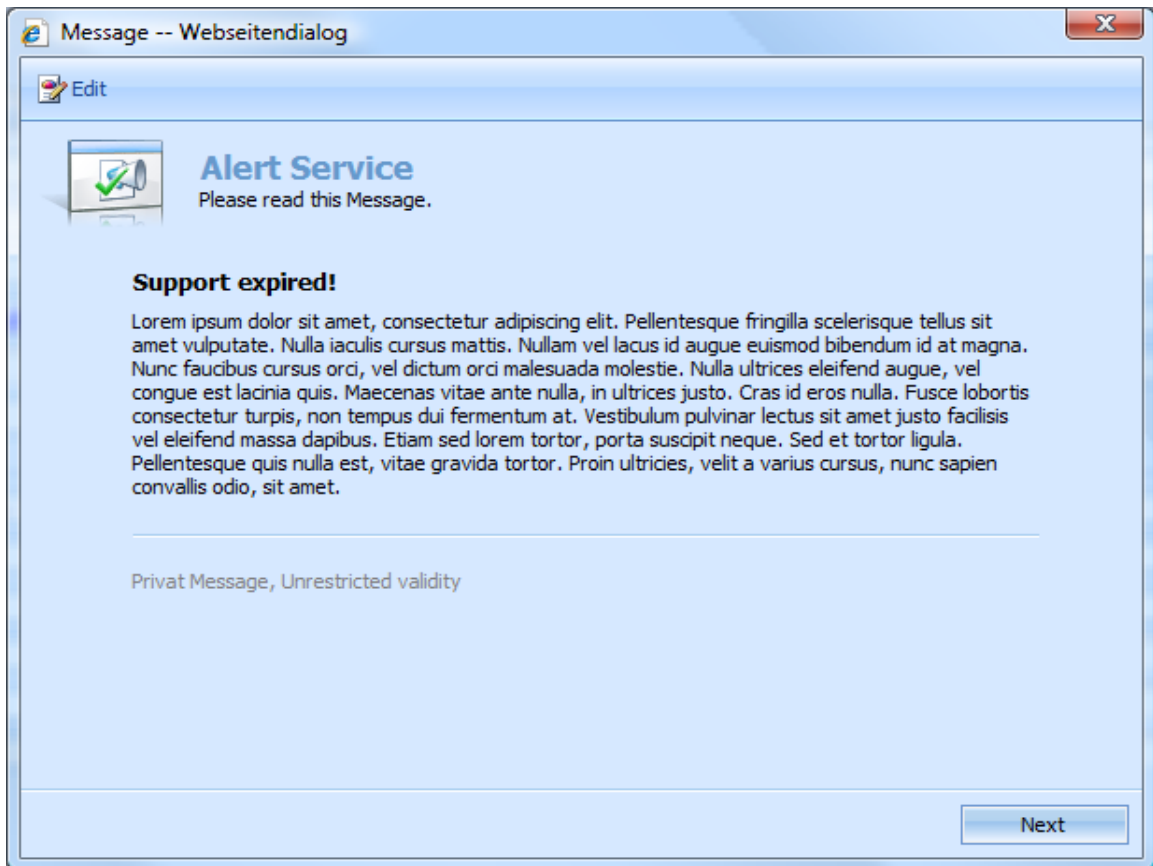
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1 Introduction

Alerts for Microsoft CRM 4.0 is a CRM add-on which allows you to display alerts for specific criteria in Microsoft CRM 4.0.

Opens a system operations for example an entity of type "company", Alerts can be displayed a message.



2 Creating Alerts

For creating an alert you have several options.

Advice:

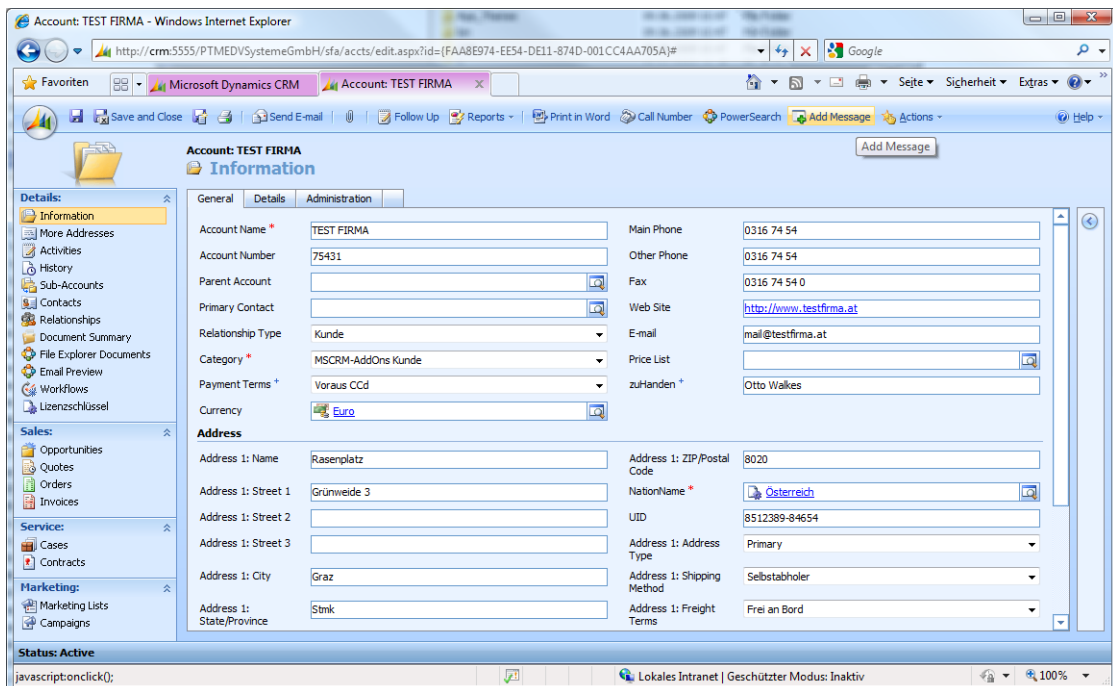
The administrator sets during installation of Alerts determine what entity types of alerts can be created.

2.1 Creating an Alerts directly into an entity

Open an entity (record) and then click the icon:



A new window will open. In this window, you now have the possibility to create an alert for the current open record.



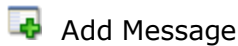
The screenshot shows a web browser window displaying the Microsoft Dynamics CRM interface for an account named 'TEST FIRMA'. The browser address bar shows the URL: <http://crm:5555/PTMEDVSystemeGmbH/sfa/accts/edit.aspx?id={FAA8E974-EES4-DE11-874D-001CC4AA705A}#>. The page title is 'Account: TEST FIRMA - Windows Internet Explorer'. The main content area is titled 'Account: TEST FIRMA Information' and contains a form with the following fields:

Field	Value	Field	Value
Account Name *	TEST FIRMA	Main Phone	0316 74 54
Account Number	75431	Other Phone	0316 74 54
Parent Account		Fax	0316 74 54 0
Primary Contact		Web Site	http://www.testfirma.at
Relationship Type	Kunde	E-mail	mail@testfirma.at
Category *	MSCRM-AddOns Kunde	Price List	
Payment Terms *	Voraus CCd	zuHanden *	Otto Walkes
Currency	Euro		
Address			
Address 1: Name	Rasenplatz	Address 1: ZIP/Postal Code	8020
Address 1: Street 1	Grünweide 3	NationName *	Österreich
Address 1: Street 2		UID	8512389-84654
Address 1: Street 3		Address 1: Address Type	Primary
Address 1: City	Graz	Address 1: Shipping Method	Selbstabholer
Address 1: State/Province	Stmk	Address 1: Freight Terms	Frei an Bord

The status bar at the bottom of the browser window shows 'Lokales Intranet | Geschützter Modus: Inaktiv' and a zoom level of 100%.

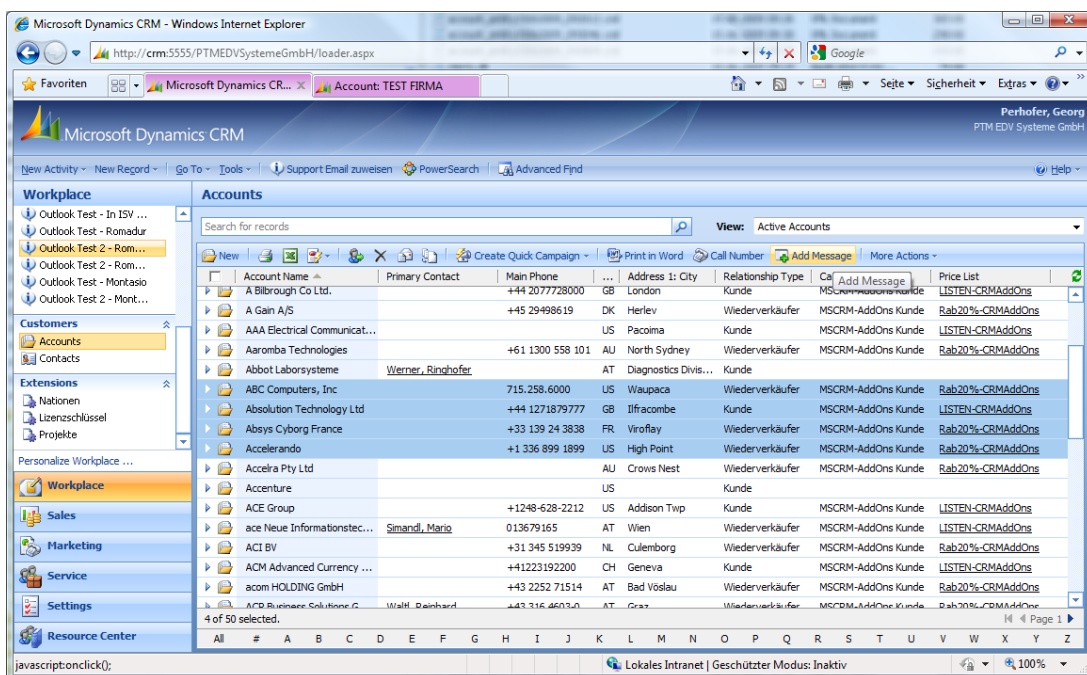
2.2 Creation of one or more alerts in a table overview

Select one or more entities (records) and click on the icon:



Advice:

Select all the records (by setting the check-box or by the keyboard command CTRL + A), now the alerts for the entire Entity type are valid. Even if you add a record at a later date, the alert for this new record are valid.

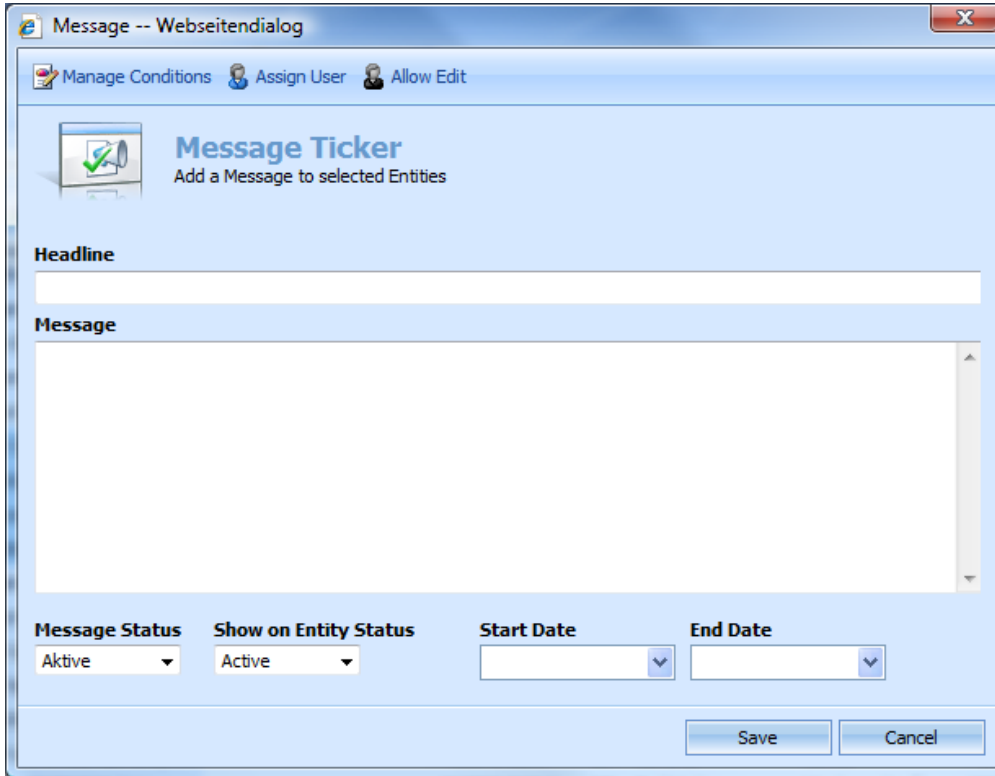


2.3 Creating Alerts in the Administration interface

Information about creating alerts in the administration interface can be found under "Alerts Administration Interface."

3 Alerts dialog - Add and Edit Alerts

3.1 The surface



Header: Enter a short pregnant title.

Message: Enter your message here.

Message Status: Put the message on Inactive and it will not be displayed.

Entity Status: Any entity (each record) has a state. For example, add a new record in your CRM, it has the status New. Only when the record is stored, the status is active. Select in the "Entity Status" list the desired state of the entity where alerts should be valid.

Start Date: Set a start date to display the alert for the first time.

End Date: Put an end date to make your end of alerts requiring a display.

Search in every data for this dataset: Activate this checkbox to search in every entity for this dataset. Is this dataset linked in another entity-type, the alert also displays in other entities. Advice: This checkbox can only be checked by adding a new Alert.

3.2 **Manage Conditions**

Manage Conditions

Here you can add advanced conditions. To check the validity of their alerts by individual perimeters.

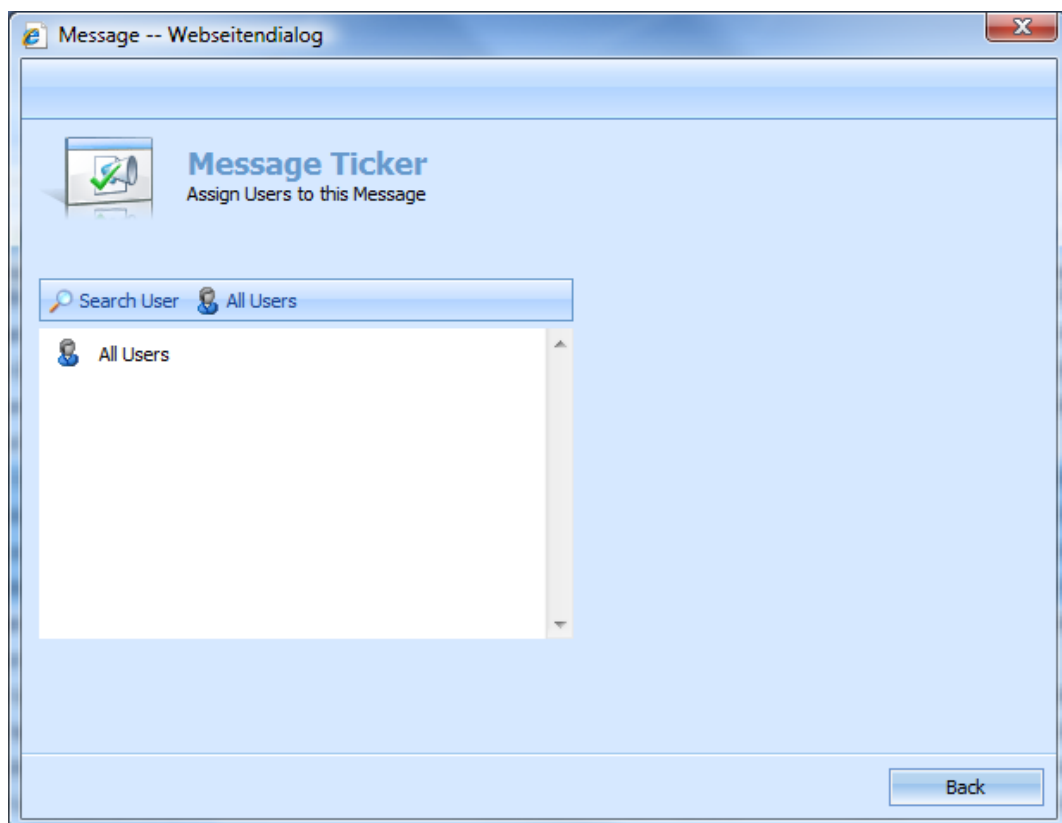
Learn more about managing conditions, see 5.5 (The Conditions field)

3.3 **Assign users who should receive this message**

With a click on

Assign User

you have the option to set users who should be receive this message.



To restrict the validity of the alert, select users who should receive this alert.

With a click on

 Search User


opens a new dialog. Here you can select any amount of CRM Users. More information about this dialog, see "The LookUp dialog"

For an alert to all users, click

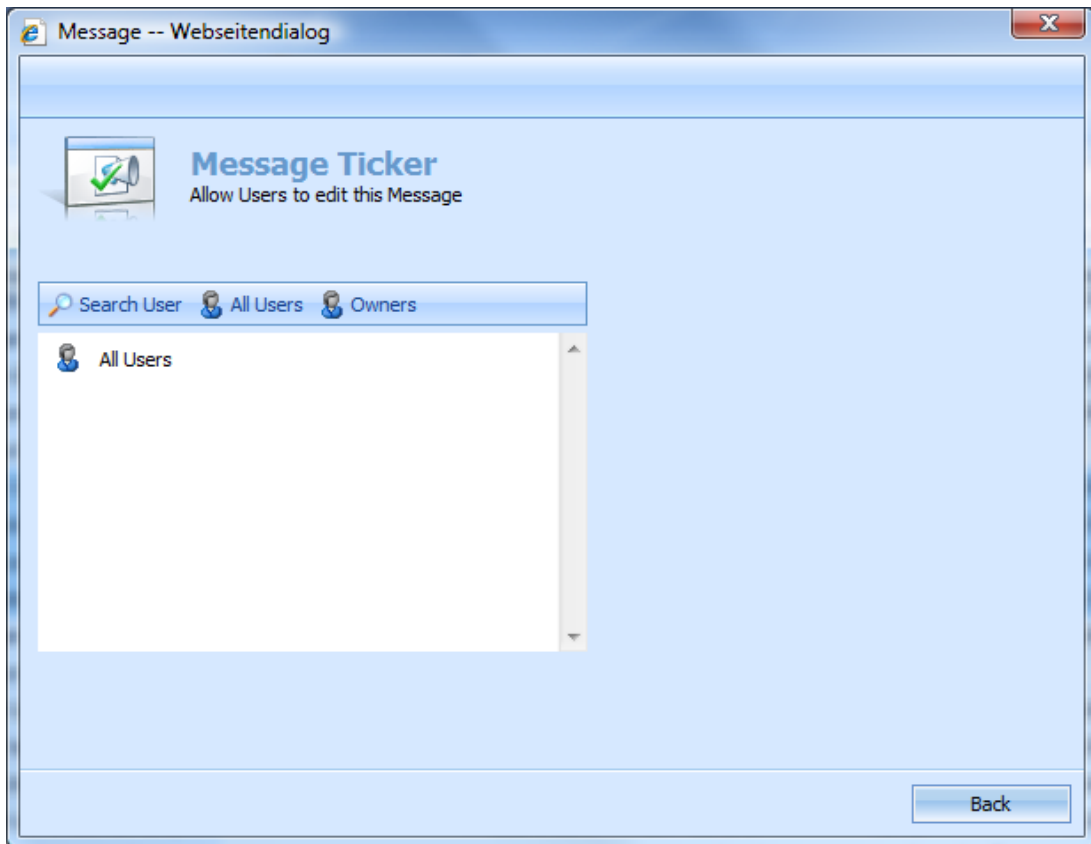
 All Users

3.4 Allow or prevent alerts-editing


With a click on

 Allow Editing

you have the option to select users who allowed to edit this alert.



With a click on

 Search User

you have the opportunity to define users who can edit this alert. More information about this dialog, see „The LookUp dialog“.

With a click on

 All Users

all users can edit this alert.

With a click on

 Owner

only the owner has the right to edit this alert.

3.5 The LookUp Dialog

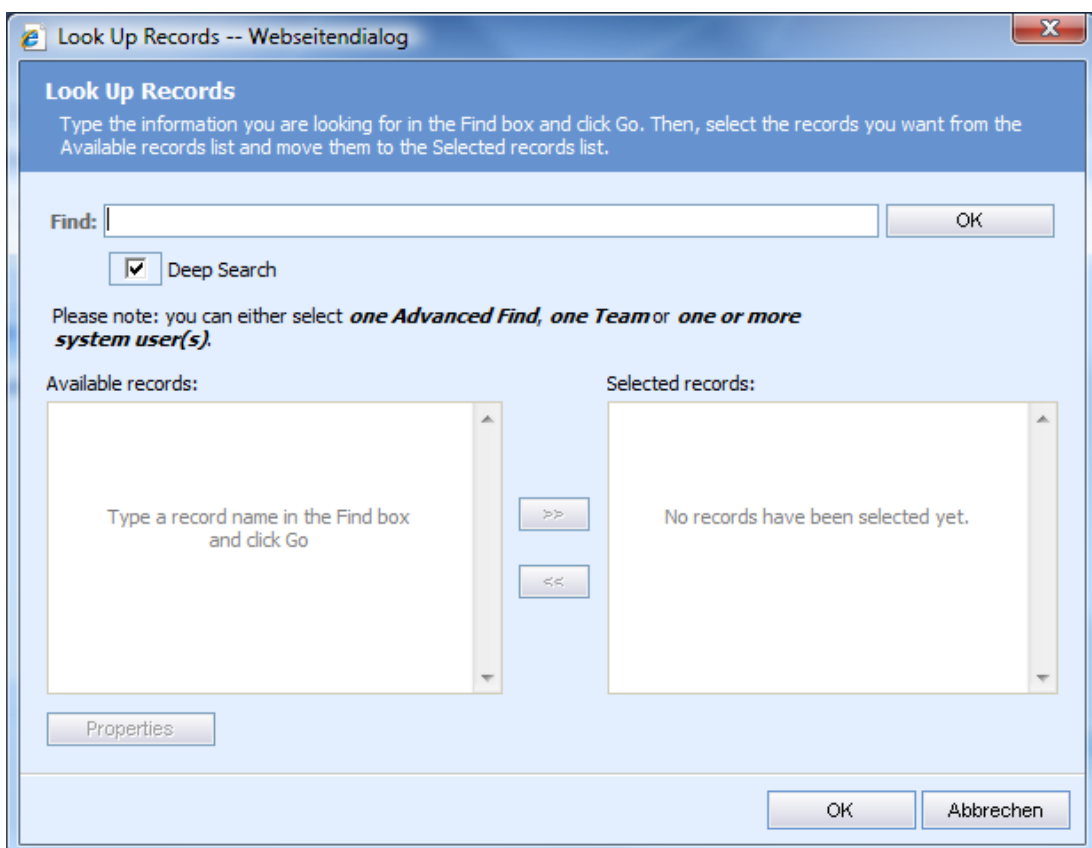
Here you have the possibility to search users, teams or saved views.

By clicking on the OK button right next to the search, all entries listed. Restrict the results by entering keywords in the search list.

Move the desired entries in the left Tabelle by double clicking or by clicking on the button [>>] in the right table. Confirm the dialog box, selected entries will added to the alert.

Advice:

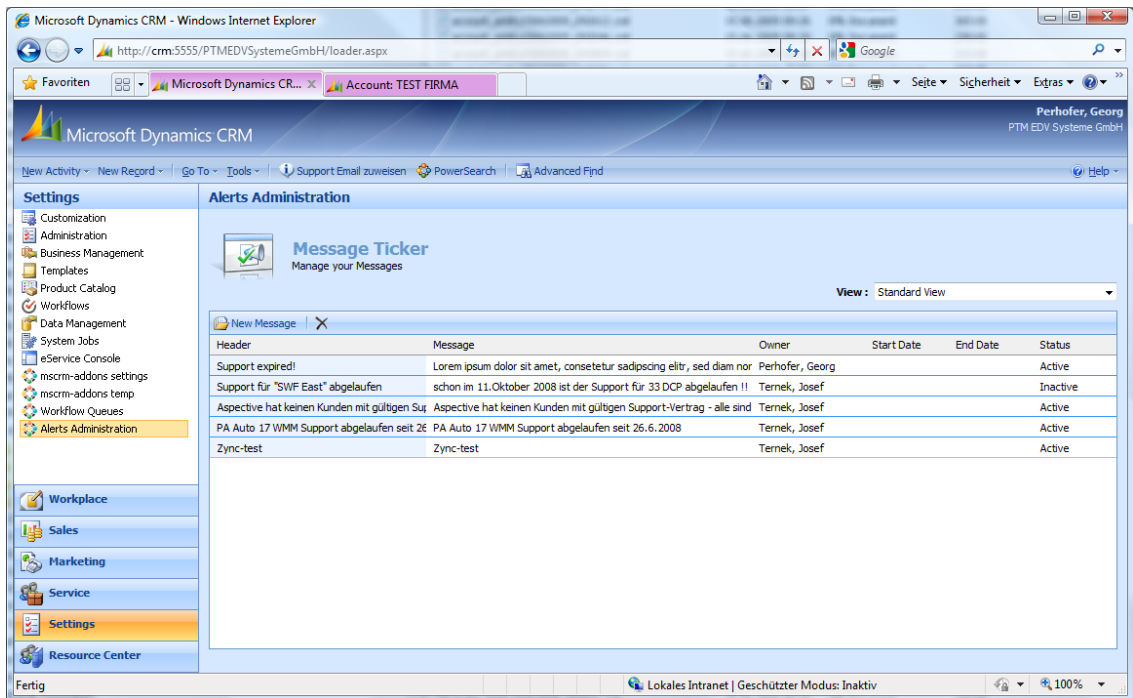
You can enter any number of users, but only one team or one saved view.



4 Alerts Administration Interface

4.1 Overview

The Alerts Administration Interface can be found under **Settings**. Then click on "Alerts Administration" to display this screen.



4.2 View

Select the desired view in the View drop-down box.

Default View: Here, all non-expired alerts displayed.

Past Alerts: Here are all past alerts displayed.

Table sorting:

Sort the table with a click on the desired column title.

4.3 Adding Alerts

Click

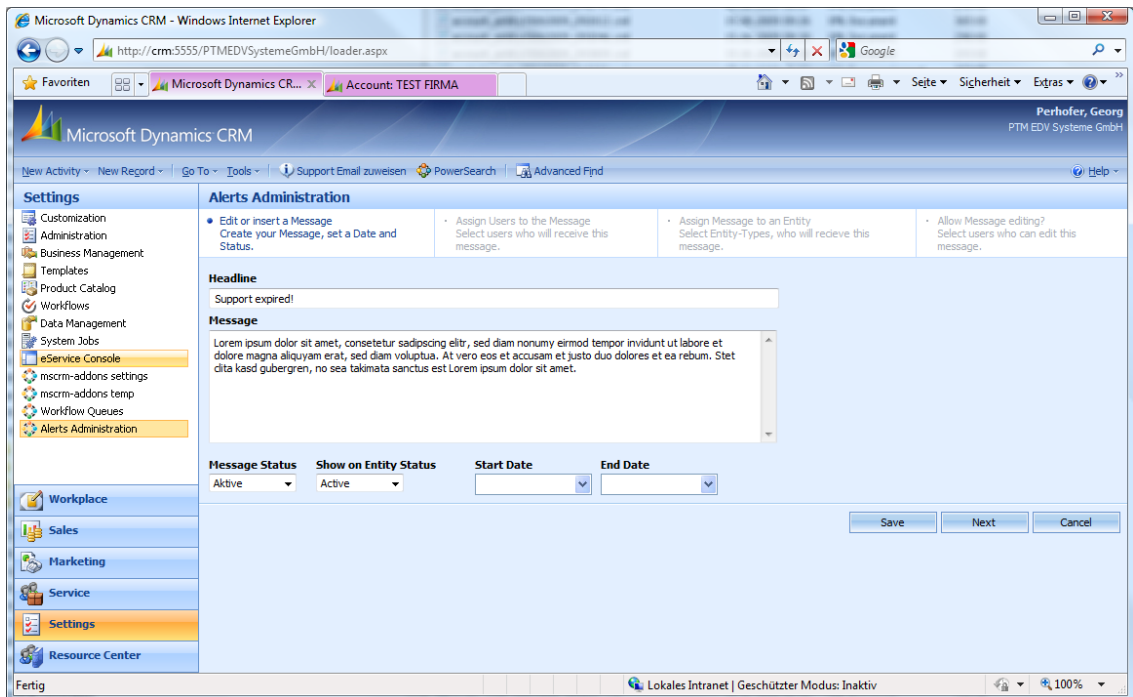
 New Alert

to add a new alert.

4.4 Editing Alerts

By double-clicking on the desired alert in the summary table will open the administration Wizzard. Here you can edit your alerts.

More on this topic, see "Administration Wizzard".

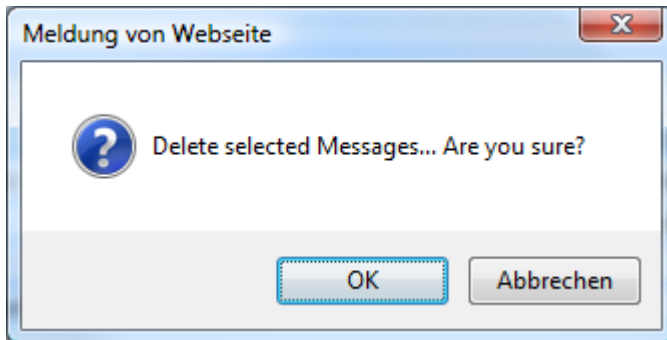


4.5 *Deleting Alerts*

Select the alerts you want to delete in the table overview. Then click on the icon:



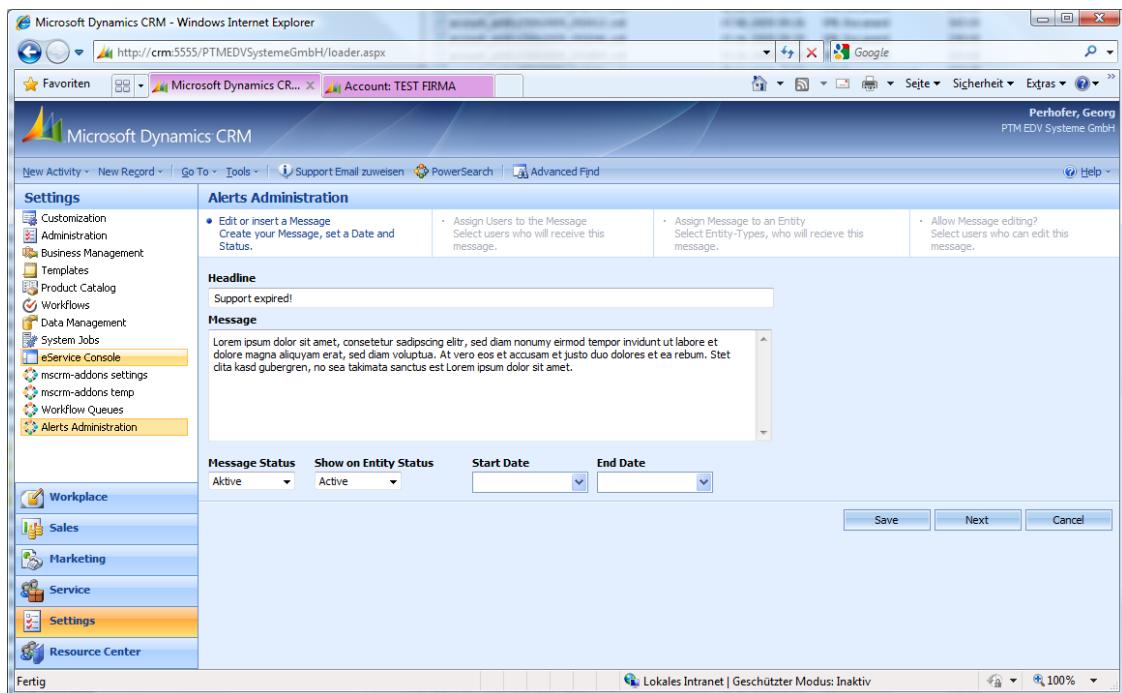
After confirmation, all selected Alerts deleted.



5 Administration Wizard

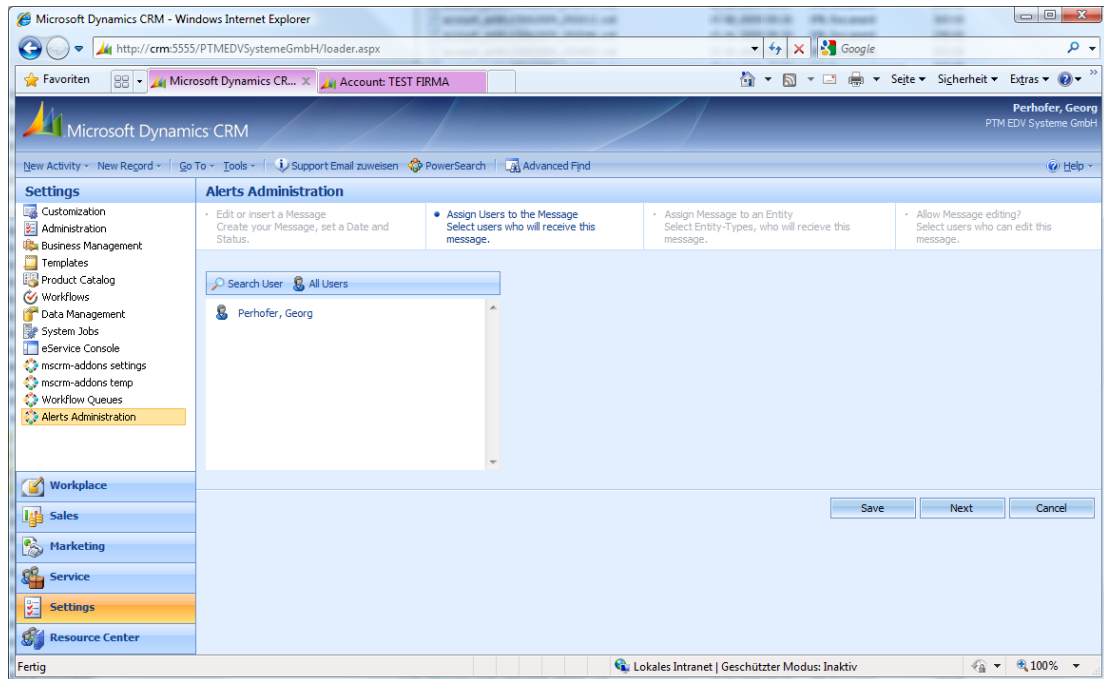
5.1 Text Editing

More information about this section can be found at point 3 - Alerts dialog - Add and Edit Alerts – The surface



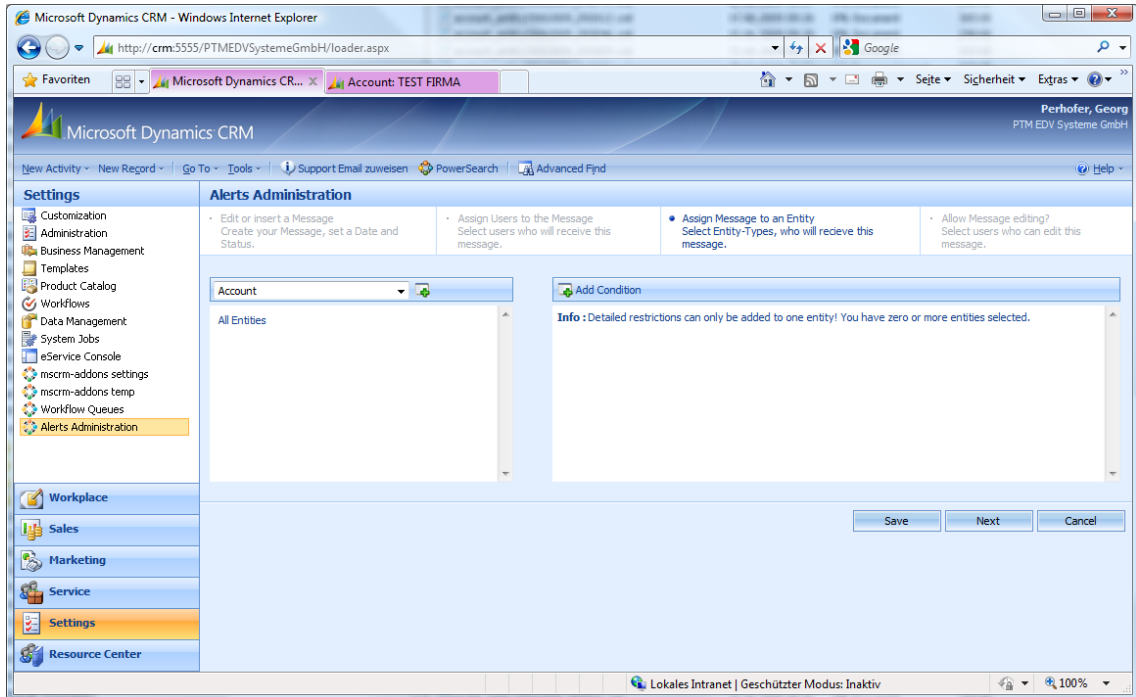
5.2 Assign users who should receive the alert

Information about this process, see section 3.3



5.3 Allocate Entity-Types

You can allocate different entity-types to the alert. For example you add the entity-type „Company“, the alert will be displayed only on „Company“ records.



Choose from the selection list, a desired entity type and then click on the icon:



The prior selected entity type is now added in the underlying table overview.

Repeat this step to attach more entity-types to the underlying table.

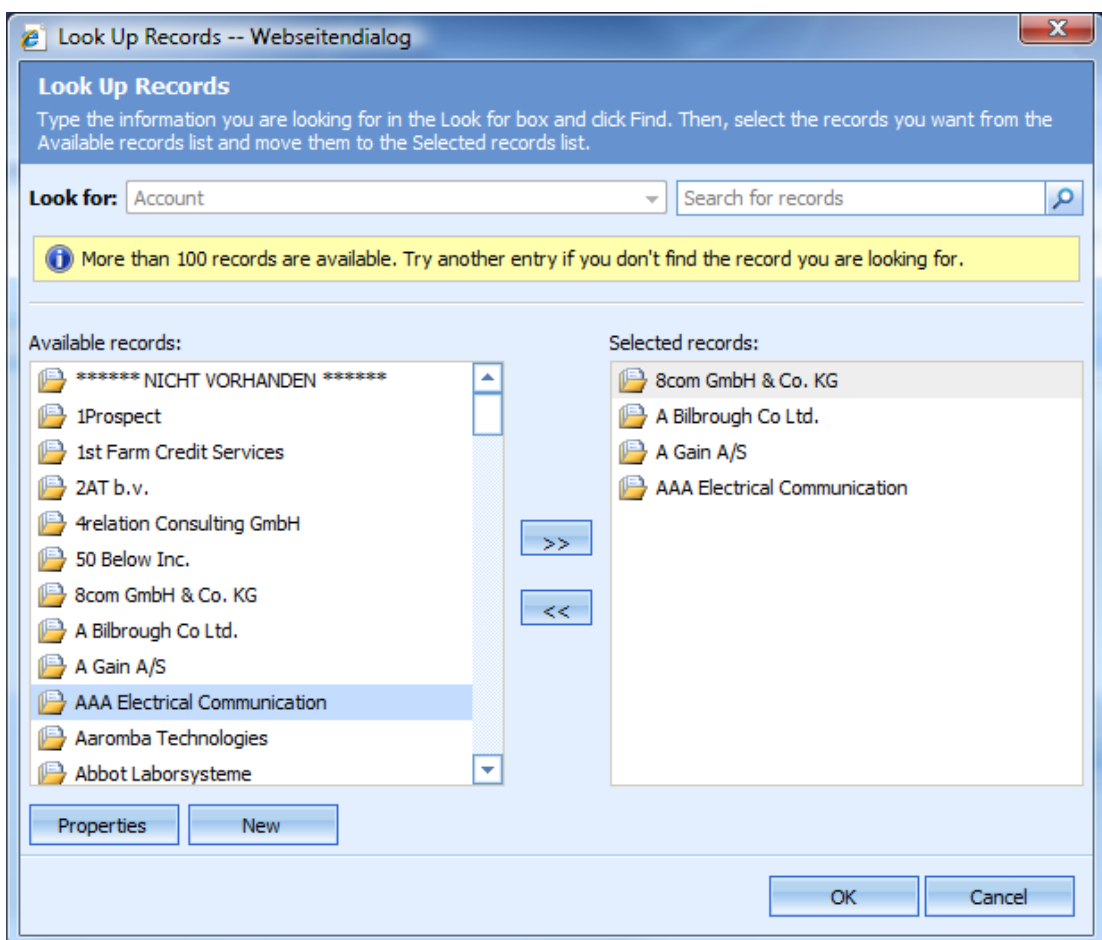
5.4 Assign Entities (records)

Add as previously described a new entity type.

You now have the option to select entities of this entity-type. If an entity-type is created, a new icon in the toolbar appears.



By clicking on this icon, a CRM dialog appears. Make your selection of records. With confirmation of the dialog, the datasets were added to the alert. The validity of the alert is restricted on these datasets.



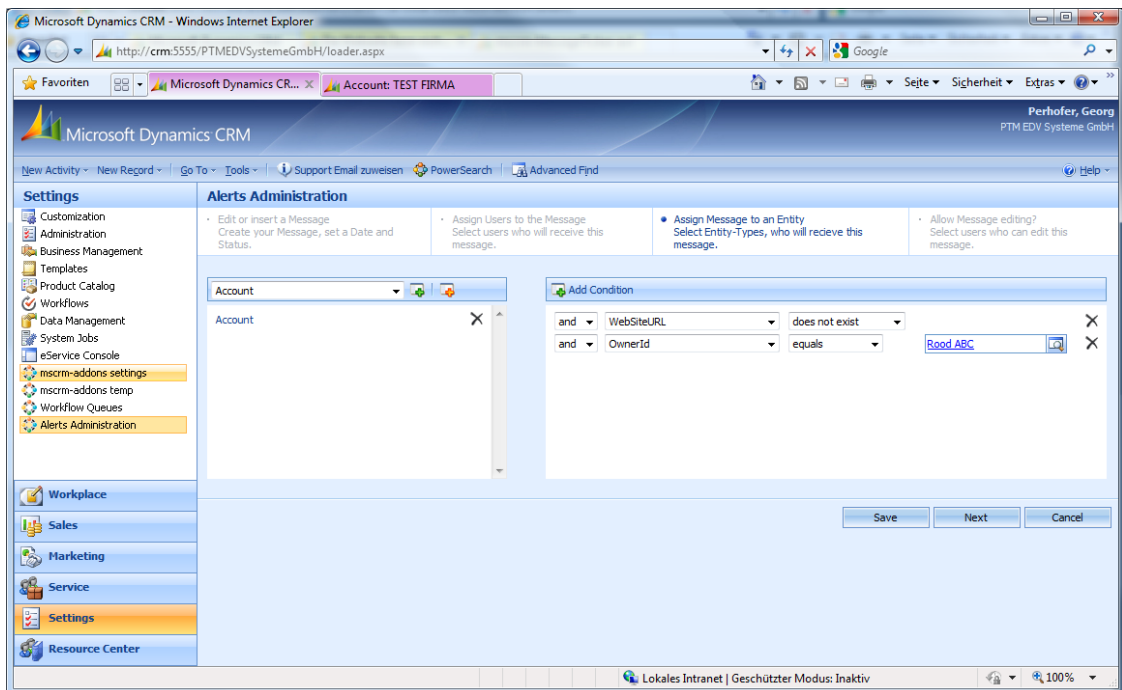
5.5 Add custom Conditions

If an entity type is created, you can add advanced conditions. To check the validity of your alerts by individual perimeters.

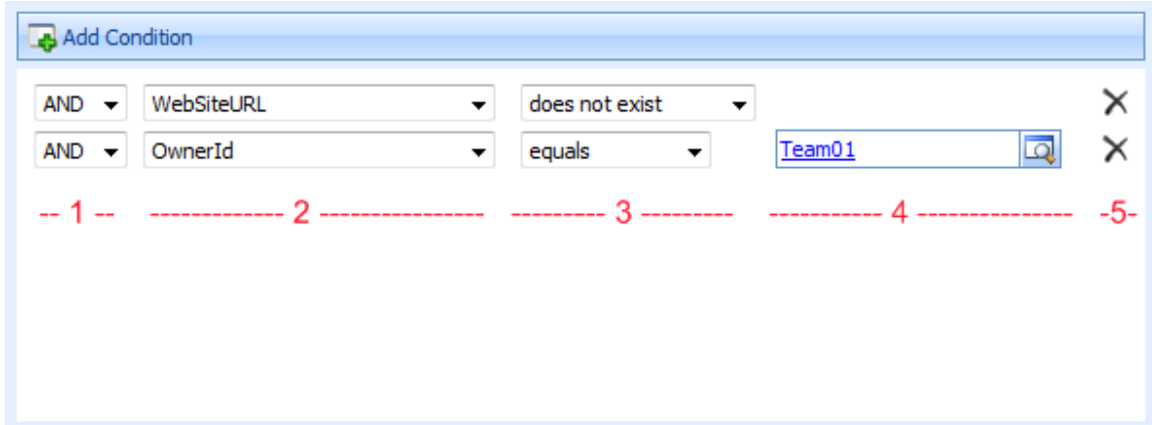
With a click on



you add a condition to the condition table.



The Condition table



The screenshot shows a window titled "Add Condition" with a plus icon. It contains two rows of conditions. The first row has a dropdown set to "AND", a text box with "WebSiteURL", a dropdown set to "does not exist", and a close button (X). The second row has a dropdown set to "AND", a text box with "OwnerId", a dropdown set to "equals", a text box with "Team01" and a search icon, and a close button (X). Below the conditions, a red dashed line spans the width of the dialog, with numbers 1 through 5 placed at regular intervals along it, corresponding to the columns of the condition table.

v

Column 1

Select "And" if all conditions must be fulfilled.

Select "Or," if only one of the "Or-conditions must be met.

Column 2

Choose your desired attribute.

Column 3

Select an operator.

Column 4

This column depends on the selected attribute type and selected operator. If a condition is a comparison of values, than in column 4 appears a text box. Enter your desired value. If the selected attribute is a type of „LookUp“, than after two icons of the text box appears:



Here you get a filling out. Locate the desired file and click OK. The text box is now filled with the correct name.

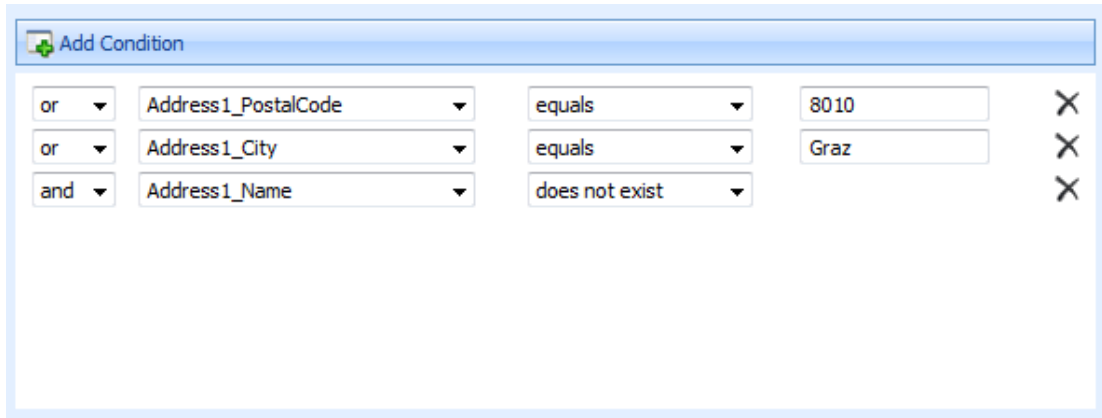
By clicking on the Name, you can verify the input. A new window will open with the assigned record is opened.

Column 5

By clicking on the icon  you delete a condition.

Example:

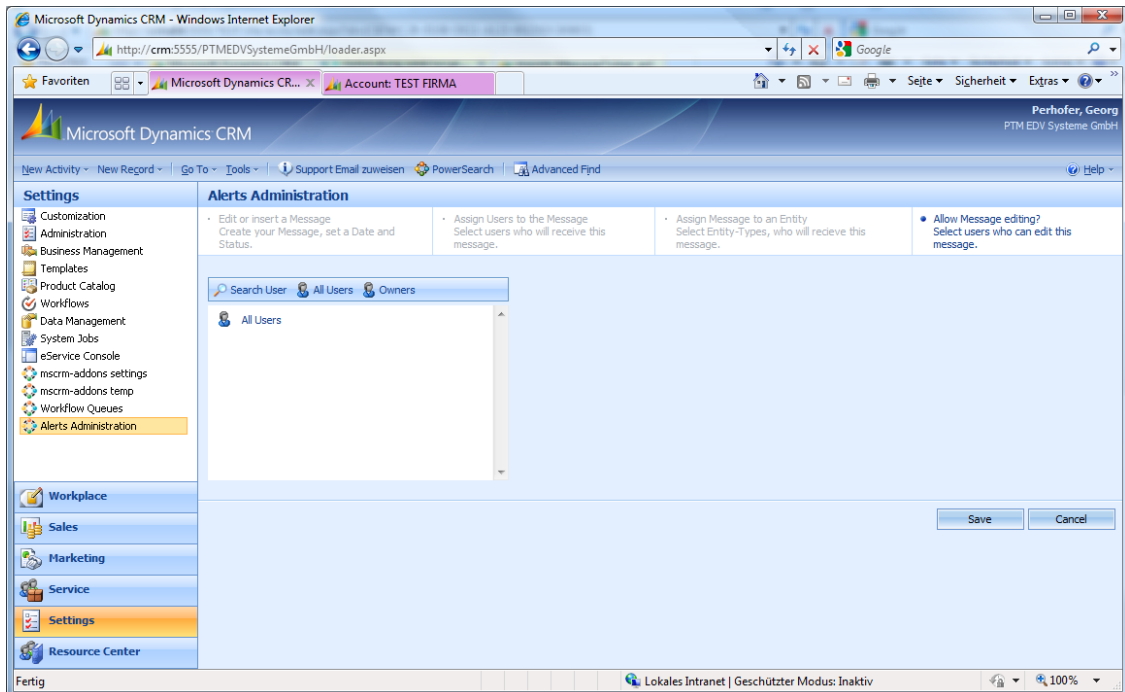
The Alert is valid if "PostalCode" equal to "8010", or "City" equal "Graz" and the "name" does not include data.



Operator	Field	Comparison	Value	Action
or	Address1_PostalCode	equals	8010	X
or	Address1_City	equals	Graz	X
and	Address1_Name	does not exist		X

5.6 Prevent Editing Alerts

Here you can determine who this Alert may edit in the future. More information can be found under point 3.4



6 Contact

If you have problems with Alerts for MS CRM 4 send a Email to support@mscrm-addons.com or call +43 316 680 880 0