c360 Alerts User Guide

Microsoft Dynamics CRM 3.0 Compatible

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Overview _____

Overview

c360 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. With Alerts, users can be sure that the most important data about a record is read first by the user accessing that record. The features of c360 Alerts are:

- Users may select alerts on any CRM record type
- Alerts are immediately displayed in a pop-up window when the record is accessed
- 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
- 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
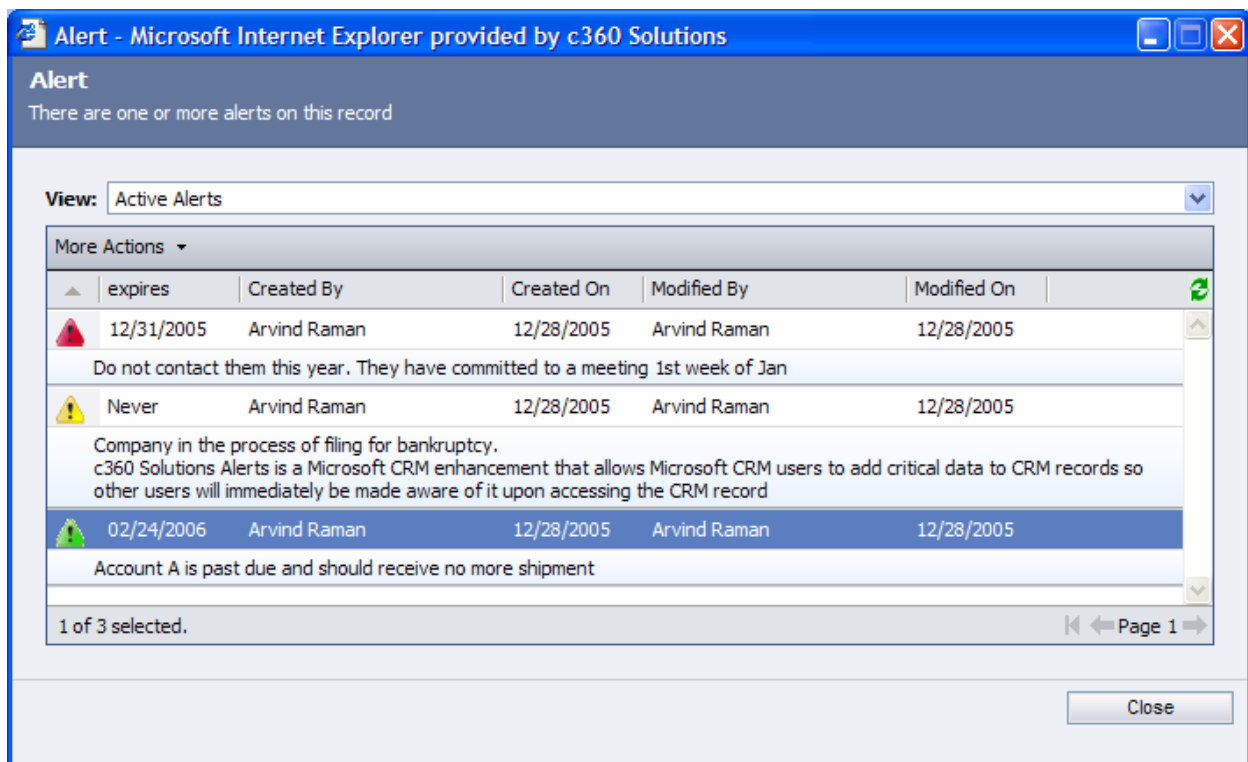- Developers may add, edit and remove alerts programmatically from custom applications

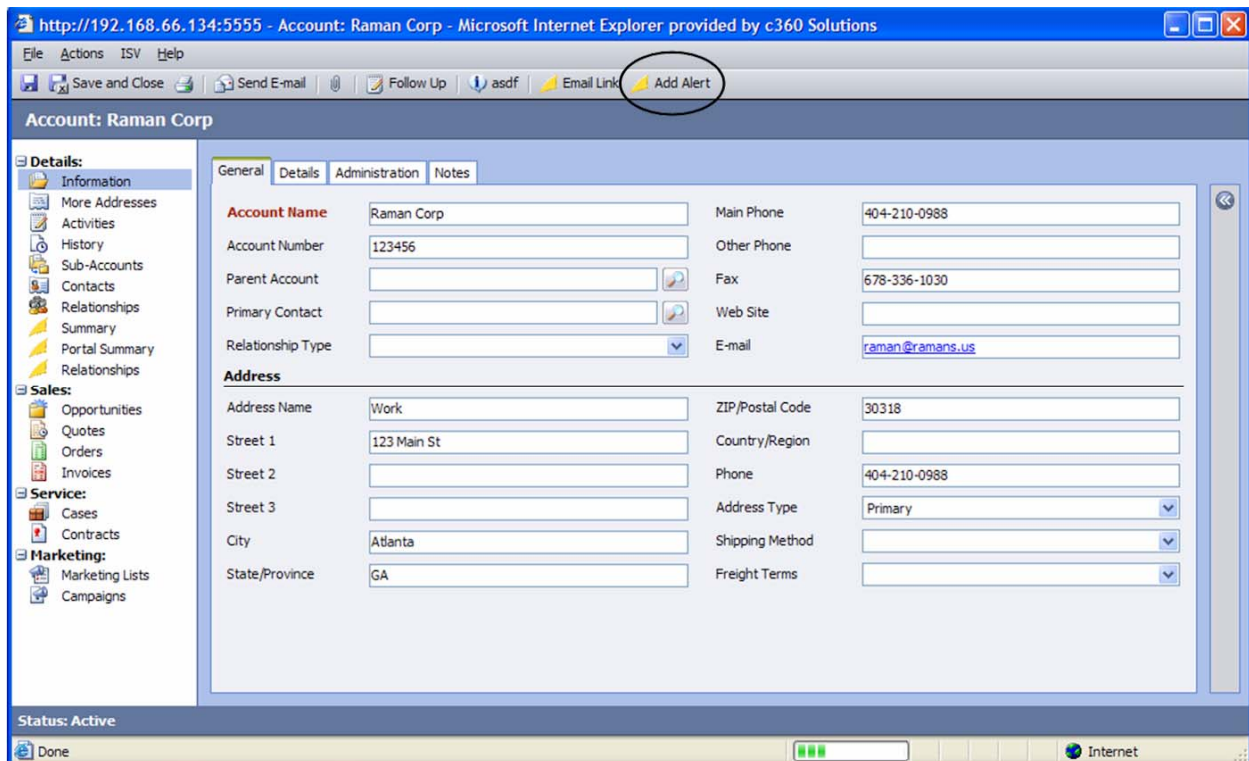

Figure 1 : Viewing Alerts on a record

Accessing Alerts _____

CRM Objects

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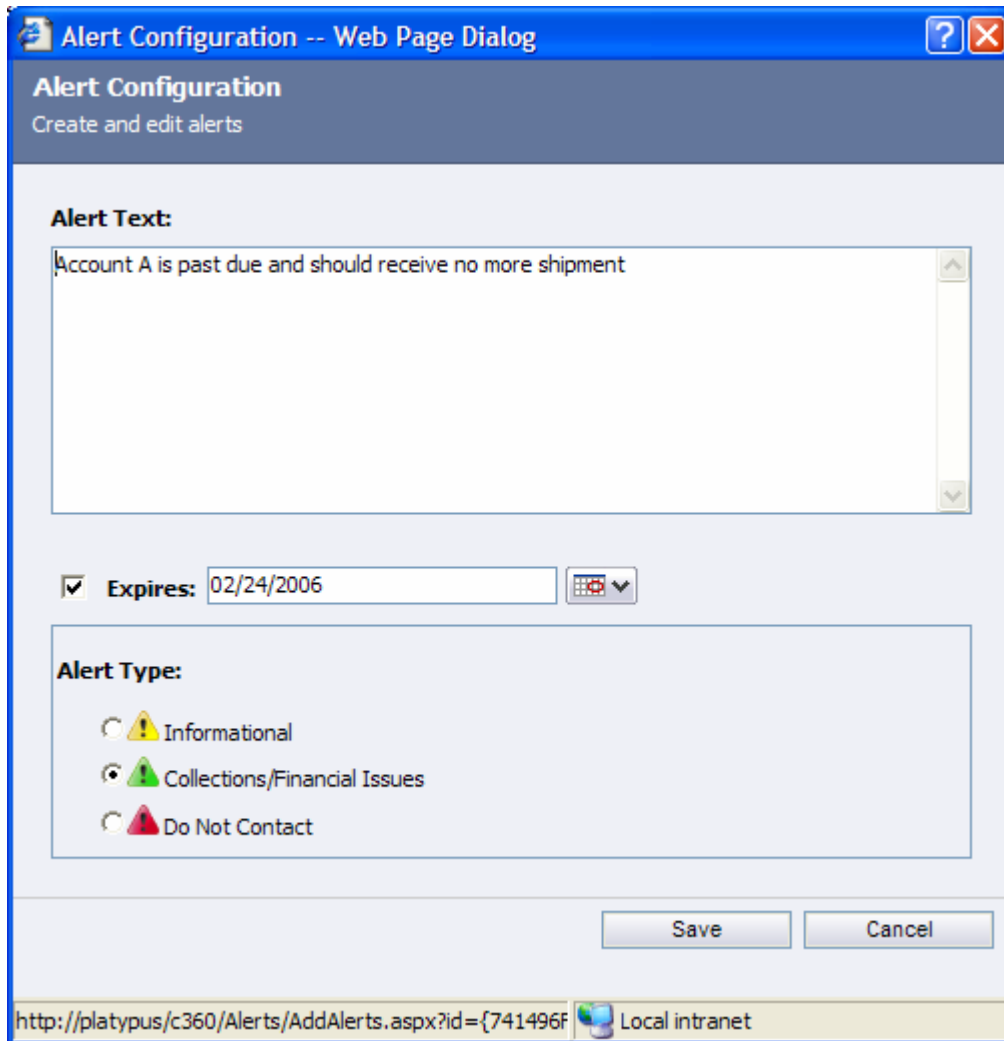
Adding an Alert

Users can add an alert by clicking the 'Add Alerts' icon on header grid of the object form. Figure 2 shows the 'Add Alert' button on the Account object.

Figure 2: Adding an Alert on an account object

Clicking the 'Add Alert' button will launch the Alert configuration screen which can be seen in Figure 3

Figure 3: Alert Configuration Screen

This screen allows you to configure the following attributes

Alert Text – the text of the Actual Alert. Example "Account A is past due and should receive no more shipment"

Expires – Alerts can be marked to expire on a certain date and time. If an alert is expired, then it will not be displayed on record launch

Type – Alerts can be marked of different types to give a quick visual display of the corresponding icons. The available types are 'Informational', 'Do not Contact' and 'Collections/Financial Issues".

Viewing an Alert

If alerts have been configured and added to a particular CRM record than the Alert Display Screen is launched when the record is opened. This screen is illustrated in Figure 4

Figure 4: Alert Display Screen
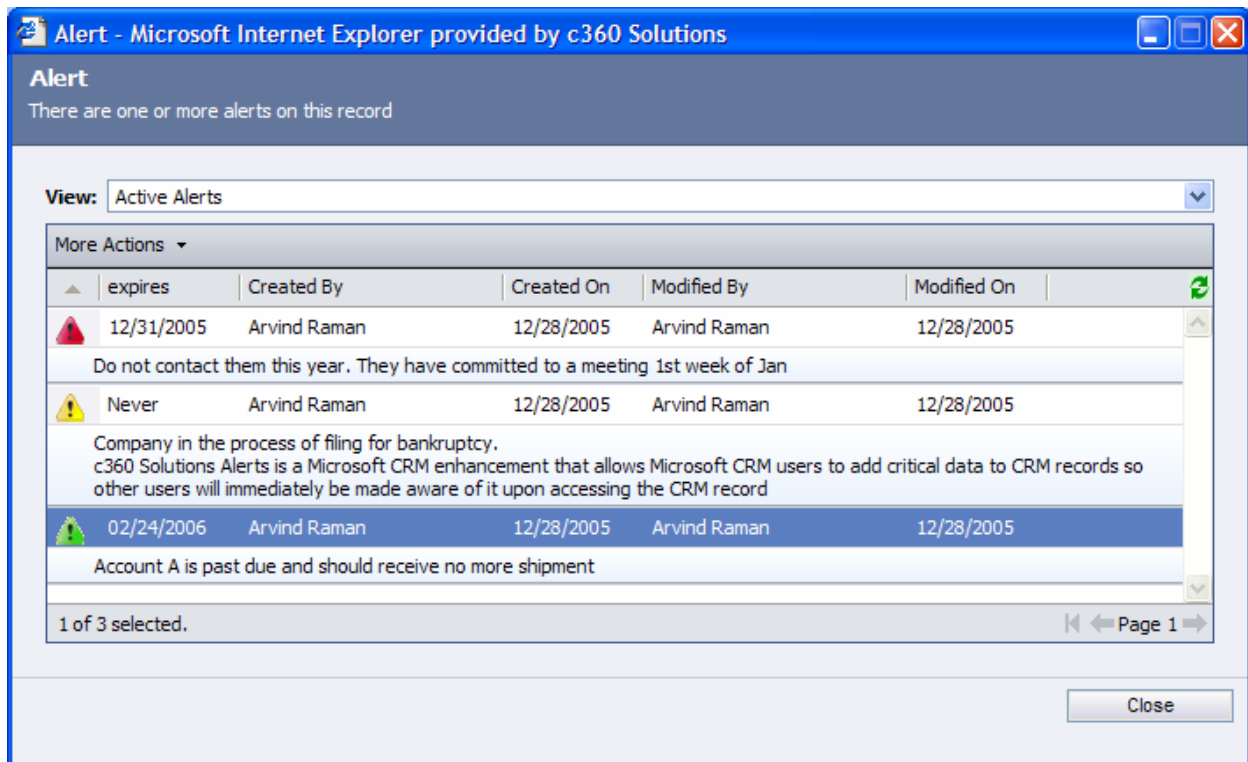
The columns on the Alert display screen are
> *Alert Type Icon* –
> *Alert Expiration Date* – date on which the alert expires
> *Created By* – user who created the alert
> *Created On* – date the alert was created
> *Modified By* - user who last modified the alert
> *Modified On* – date/time the alert was last modified
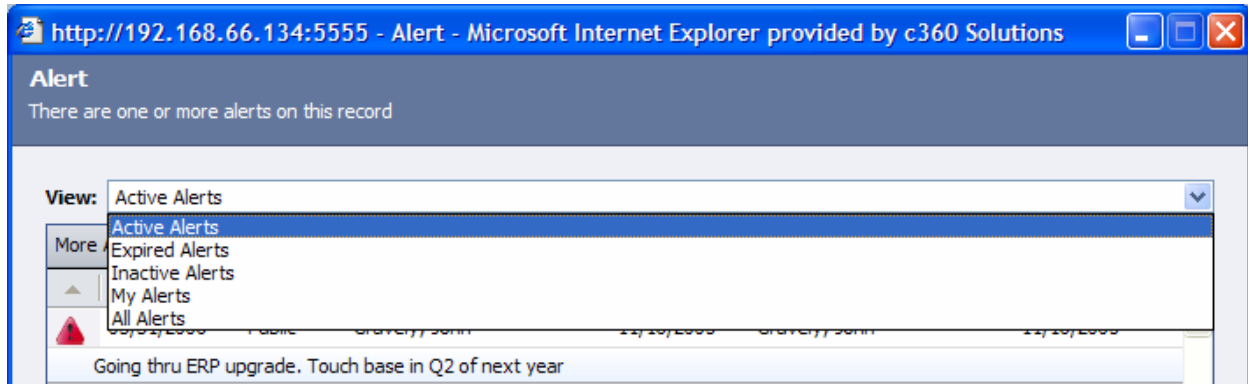> *Alert Text* – full display of all alert text wrapped in the grid

Figure 5: Alert View

The default view of the Alert Display Screen is Active Alerts (list of active alerts for the selected record). The user can change the view using the View drop down (Figure 5). The different view choices are:

Active Alerts – List of active alerts for the selected record
Expired Alerts – List of alerts for the selected record that have expired
Inactive alerts – List of alerts for the selected record that have been deactivated
My Alerts – List of alerts for the selected record created by the user
All Alerts – All alerts for the selected record

Editing an Alert

The More Actions menu on the header grid, gives the user the ability to edit an existing Alert. Figure 6 illustrates the More Actions menu.
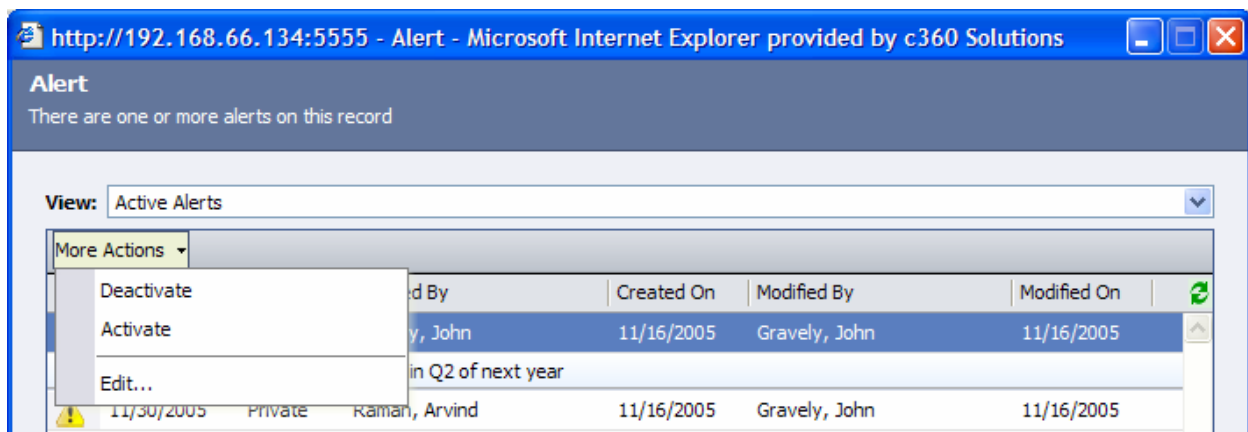

Figure 6: Alert More Actions menu

Deactivating an Alert

Alerts can be deactivated from the system under the More Actions menu. Deactivated alerts are not removed from the system but rather deactivated. Deactivated alerts can be re-activated in the same way. See Figure 6.

Adding Alerts in Bulk to Advanced Find Query

Alerts can be added in bulk to any Advanced Find view or query result. This can be done through the Alert Settings area.

To add Alerts in Bulk

1. Click on Settings tab and then c360 Settings. This will launch the c360 Settings page for the various c360 products. See Figure 7
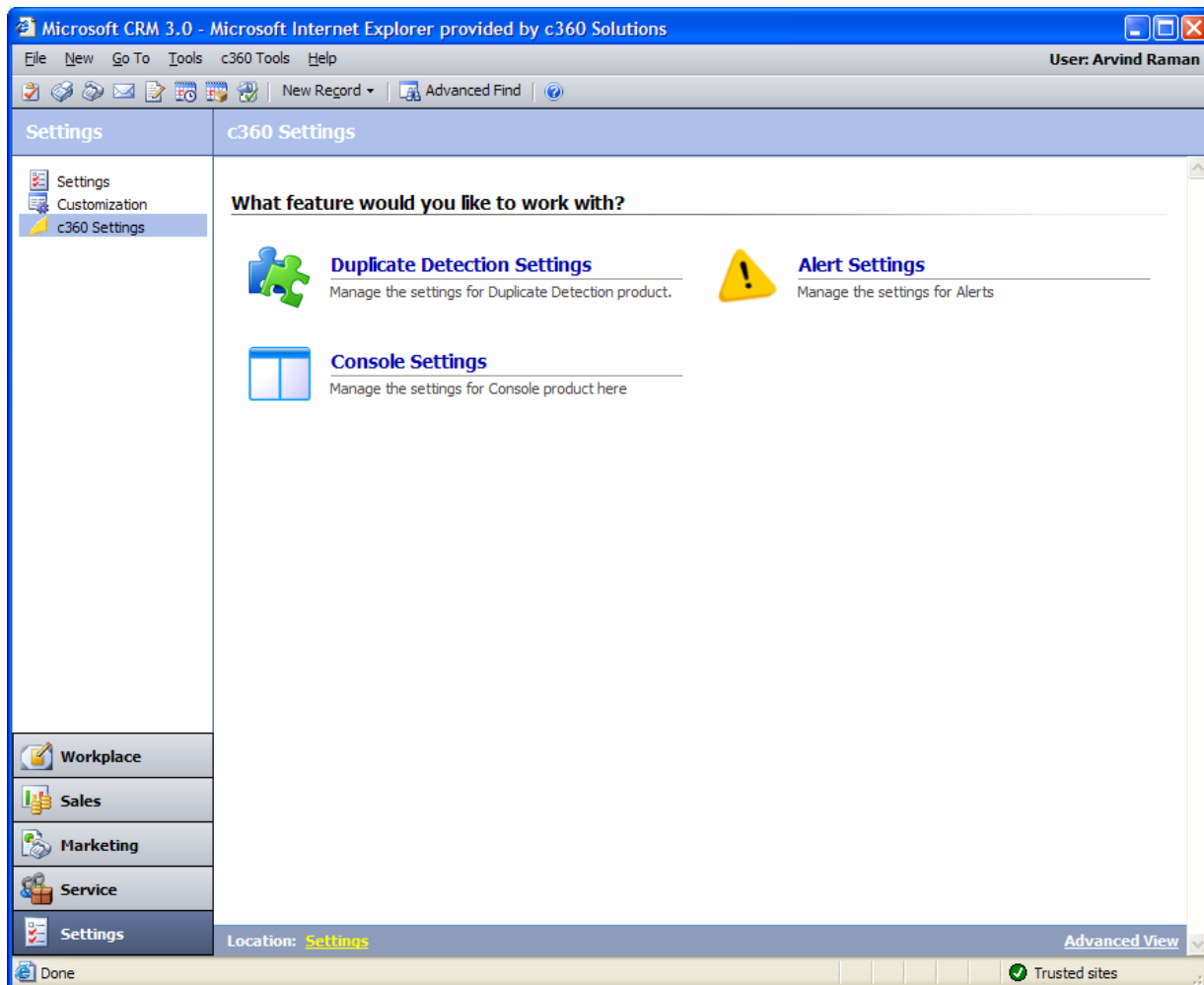

Figure 7: c360 Settings screen

2. Click on Alert Settings. This will launch the Alert Settings screen. See Figure 8
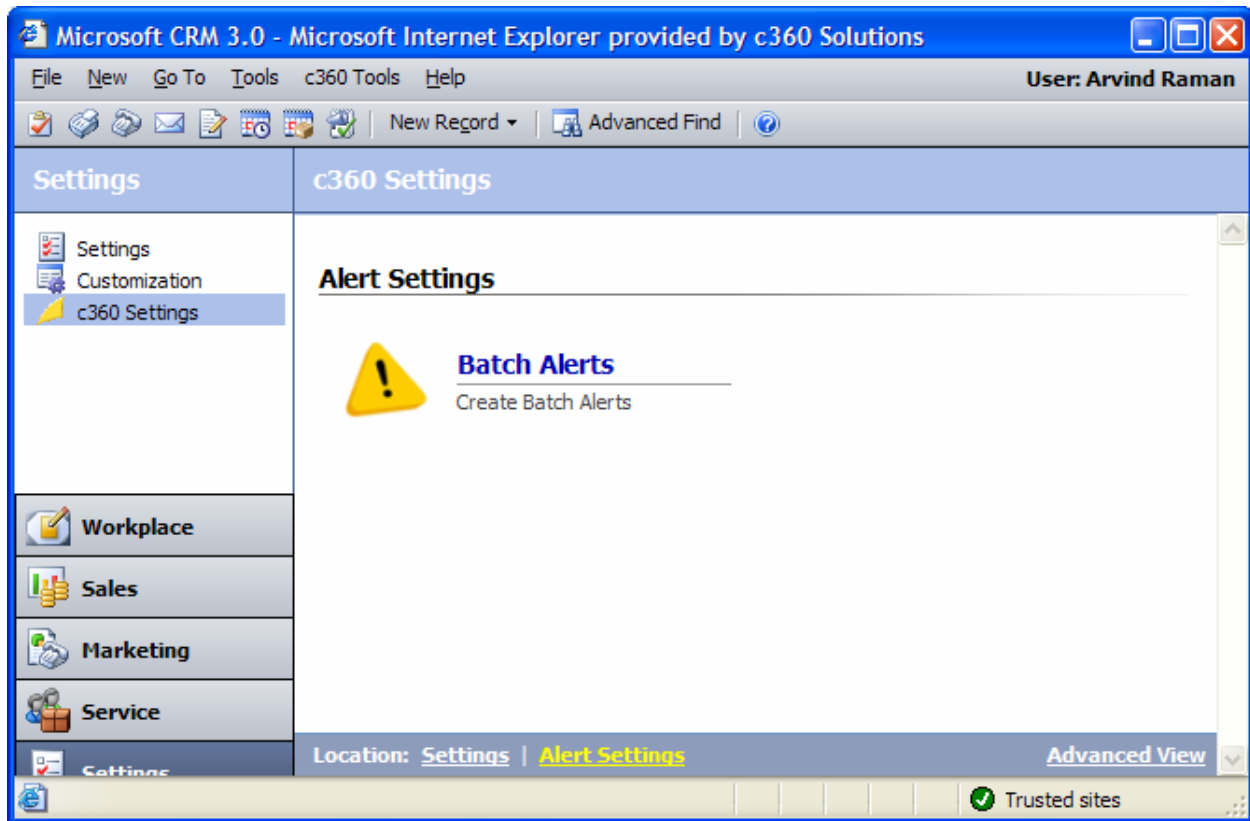
Figure 8: Alert Settings screen

3. Clicking on **'Batch Alerts'** will launch the 'Batch Alert configuration screen'. This is illustrated in Figure 9. Notice how the Batch Alerts Configuration screen is similar to the standard Alert configuration screen except this screen contains two more drop downs where you can select the Advanced Find view.

    'Look For': Drop down list of all the entities on which Alerts has been configured.

    'Use Saved View': Drop down list of all the Advanced Find views (System views and My views) for the selected entity

Figure 9: Bulk Alert configuration screen

4. After you enter the Alert text information, clicking 'Apply' will bring a message back stating the number of records that it will be applied to. See Figure 10. You have the option to click 'OK' to apply the Alert or 'Cancel' to cancel this operation
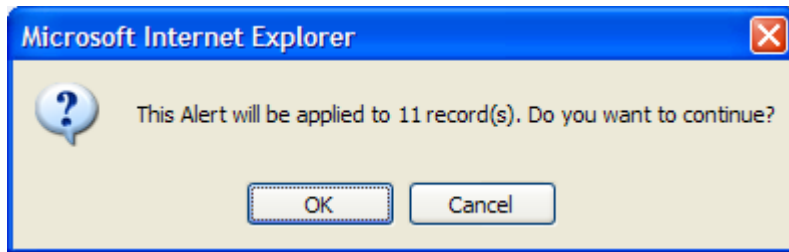
Figure 10: Alert confirmation dialog

5. After you click 'OK', the Alerts will be processed in batch to the Advanced Find view result set. You can now go back to what you were originally doing
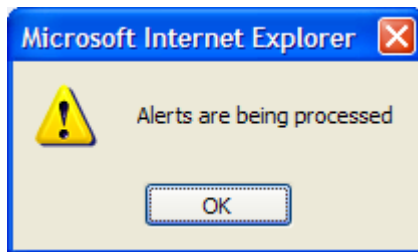

Figure 11: Alert processing dialog

Troubleshooting _____

Question: I cannot see the 'Add Alerts' button in CRM?

Answer: Microsoft CRM 3.0 has introduced a new security privilege named 'ISV Extensions'. This privilege determines whether a user can see certain ISV screens, menus and buttons (such as c360 products) when these screens, menus and buttons are linked to entity forms. Several of the standard Microsoft CRM security roles have this privilege turned off by default. All c360 Installation, Configuration and User Guides explain how to turn this privilege is turned on. That information is also included below:

Setting the 'ISV Extensions' Security Privilege
Microsoft CRM 3.0 has introduced a new security privilege named 'ISV Extensions'. This privilege, illustrated in the screen shot below, can be found in the 'Miscellaneous Privileges' section of the 'Customization' tab of any security role form. In several of the standard roles, this value is set to the 'None Selected' (a red circle with a blank center is displayed) by default. <u>This privilege must be set to the 'Organization' value</u> (a solid green circle is displayed) in order for users to see c360 tabs and screens that are linked to entity forms.
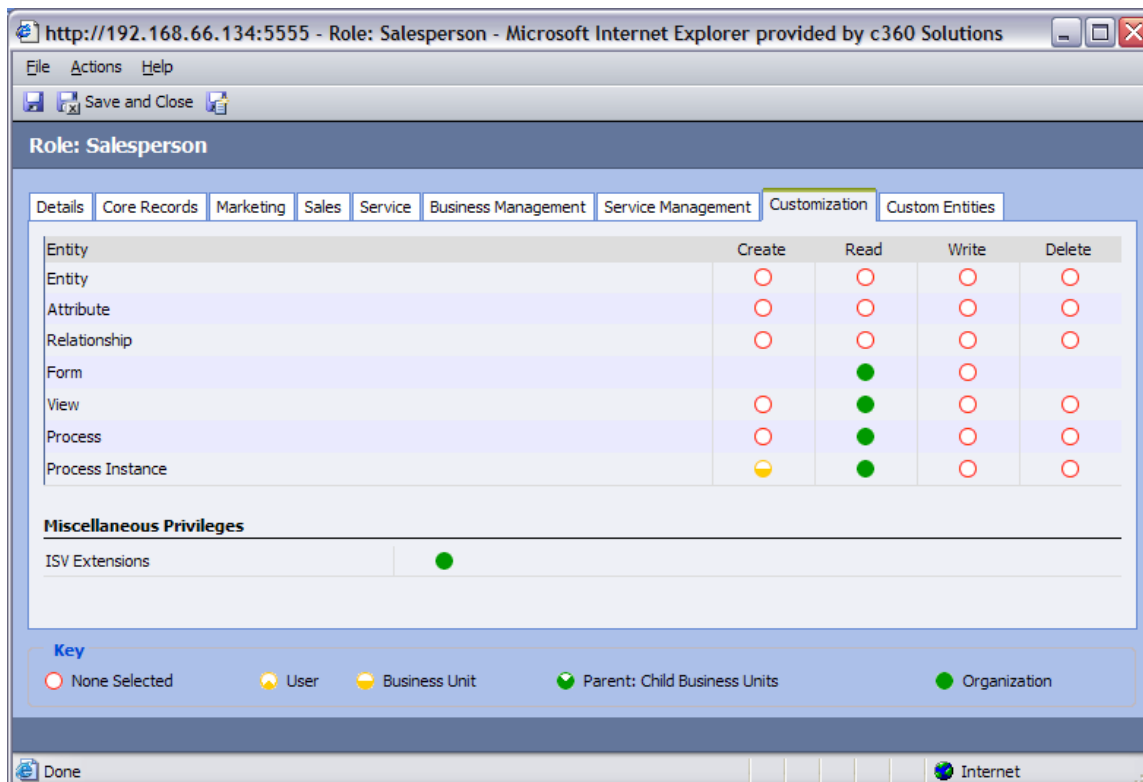

Figure 7: The security privilege titled 'ISV Extensions' must be set to 'Organization' for users to see c360 screens at the entity level

Question: I can see the 'Add Alerts' button in CRM but it says my security role does not have the right permissions to add alerts?

Answer:

In order to enable all CRM users to view and use 'Alerts', the Custom Entities security privileges for 'Alert' must be set in all the CRM roles.
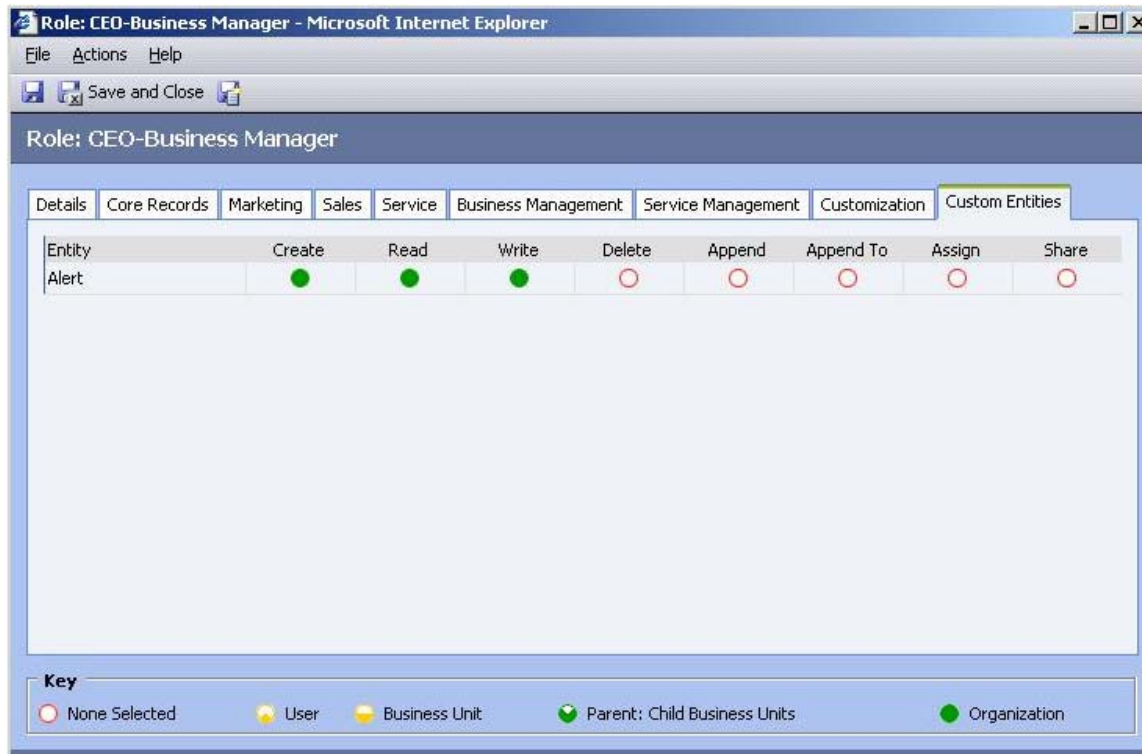
Steps for setting Security Privileges for 'Alert'

1. Go to CRM Settings > Business unit settings > Security roles.

2. Open a security role and click on 'Custom Entities' tab.

3. Set the 'Create', 'Read' and 'Write' values for 'Alert' to 'Organization'.

4. Save and Close.