



NuSoft Alert Pro

Version 8.6.0.0

Installation and Configuration Guide

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Introduction

This document is designed as an introductory guide for Microsoft Dynamics CRM users to learn how to install and configure NuSoft Alert Pro.

NuSoft Alert Pro is a handy tool that allows the users to add a custom alert to Accounts, Contacts, Leads and Opportunities.

Features:

- Display multiple custom note/alert in a subgrid inside the form(Accounts, Contacts, Lead, and Opportunity) up to 500 characters.
- Different views and easy modification of alerts
- A colored escalation level for each alert
- An expiration date on the alerts to deactivate when they are no longer relevant

Requirements/Compatibility

NuSoft Alert Pro is compatible with CRM 2016.

The following browsers are supported:

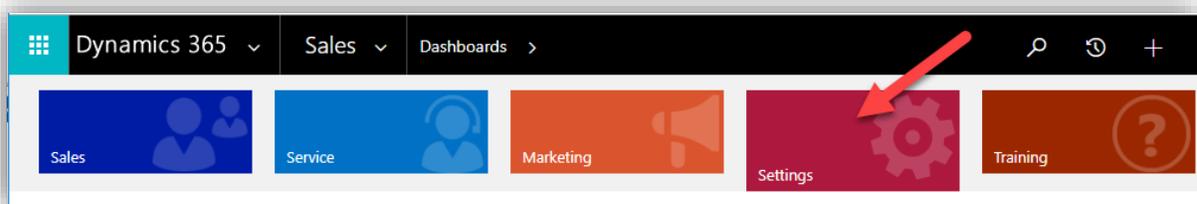
- Internet Explorer 10+
- Google Chrome 43+
- Safari 8.0.5+
- Firefox 38.0.5+

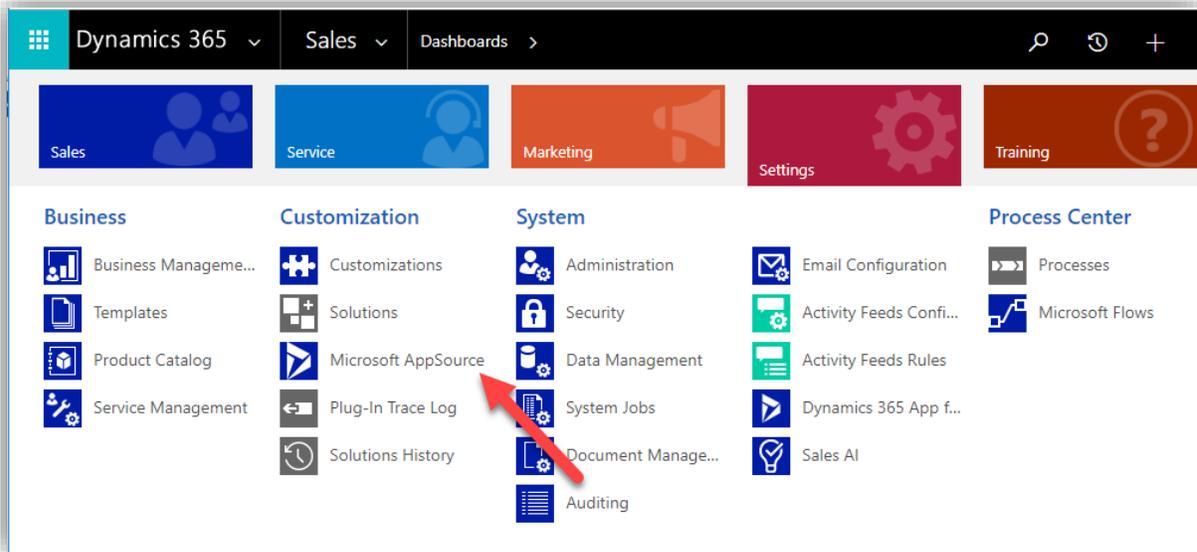
NuSoft Alert Pro may work on previous browser versions, the mentioned versions have been tested and are known to work.

Installing NuSoft Alert Pro

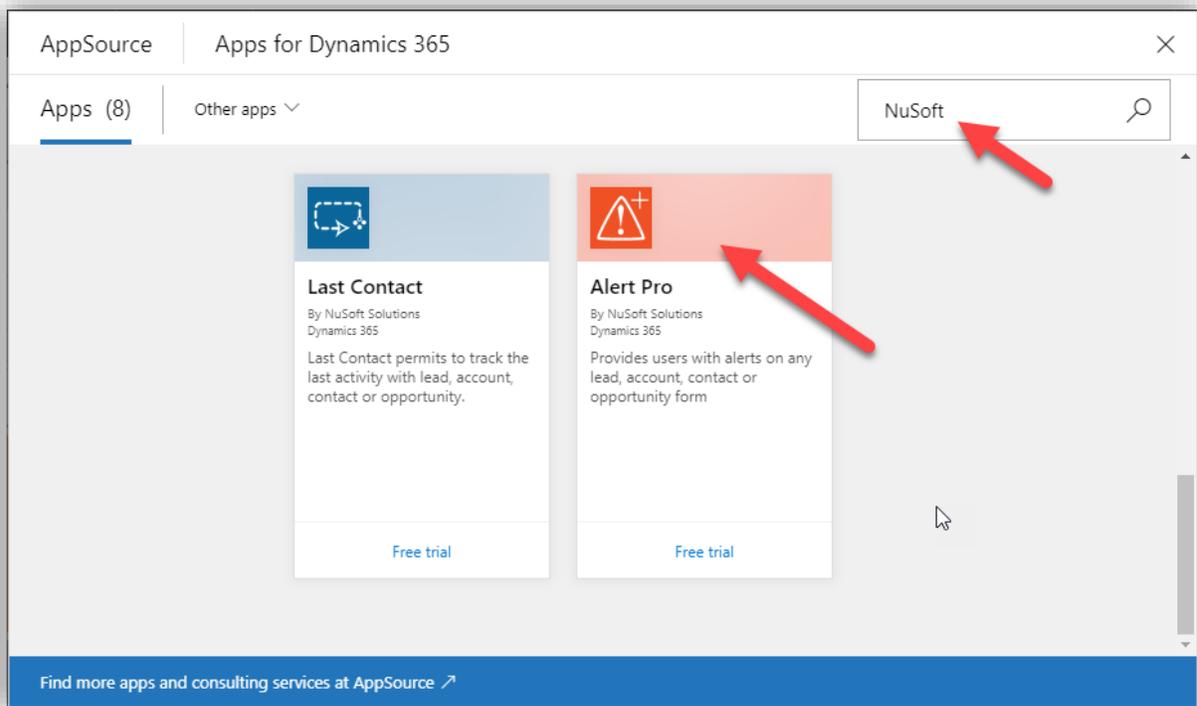
Installing NuSoft Alert Pro

1. Navigate to **Settings** -> **Microsoft AppSource**

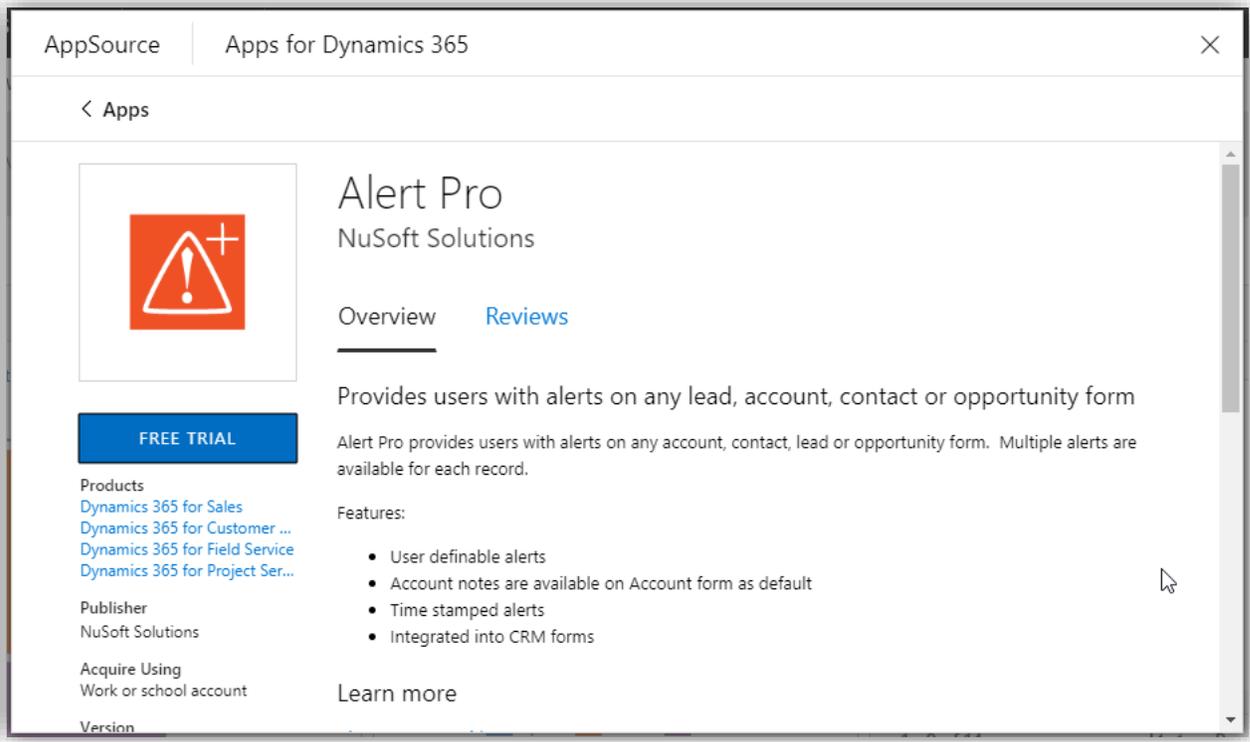




2. Enter “NuSoft” in the search box and click on “Get it Now” for NuSoft Alert Pro.



3. Check the box and click **Free Trial**. A popup will prompt for your contact information. Enter you data and click continue.



4. Agree to the conditions and click **Agree**

Atrio Systems



ATRIO Alert Pro

Atrio Alert provides users with alerts on any lead, account, contact or opportunity form. Individual alerts are available for each record.

Features:

- User definable alerts
- Account notes are available on contacts
- Time stamped alerts
- Copy account alerts
- Integrated into CRM forms

Publisher: Atrio Systems

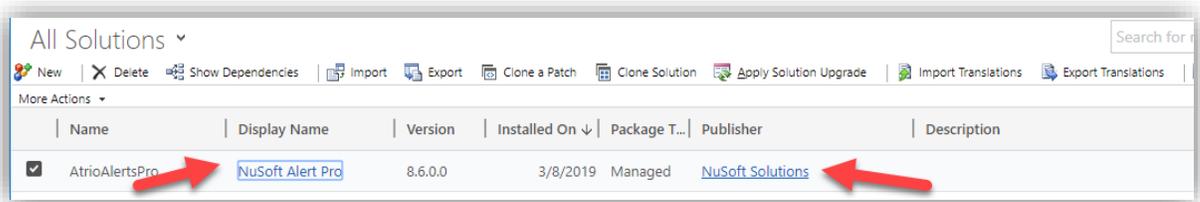
Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365
Organization to add the application to:

- Agree to Microsoft's [Legal Terms](#) and [Privacy Statement](#)
- Agree to [Privacy Statement](#) and [Legal Terms](#) for Importing solutions into Dynamics 365

5. Come back to **Settings > Solutions > All Solutions** records page after the installation has completed, **NuSoft Alert Pro** solution file should show up in the records.

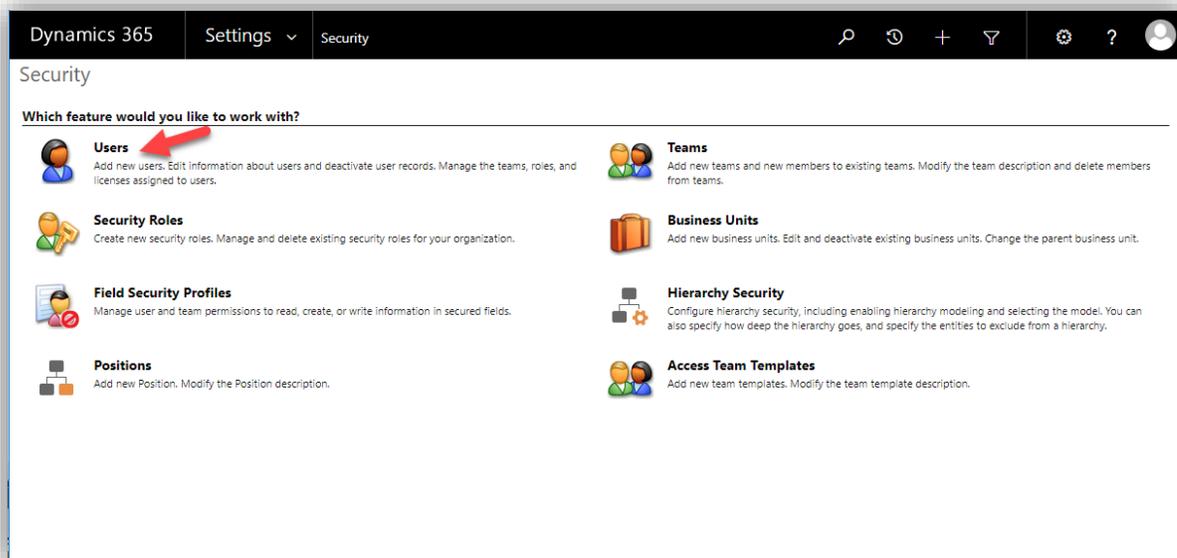
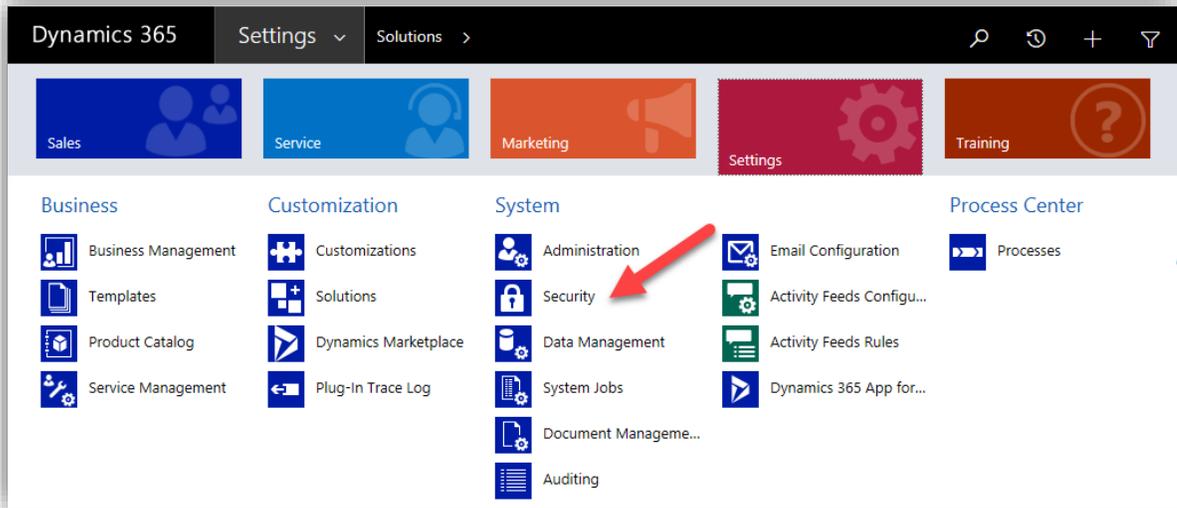


	Name	Display Name	Version	Installed On	Package T...	Publisher	Description
<input checked="" type="checkbox"/>	AtrioAlertsPro	NuSoft Alert Pro	8.6.0.0	3/8/2019	Managed	NuSoft Solutions	

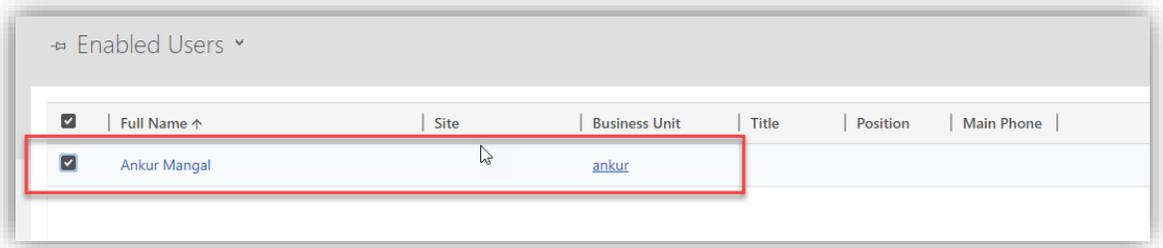
Assign User Roles

Anyone who needs to see NuSoft Alert pro needs the **NuSoft Alert Pro** security role.

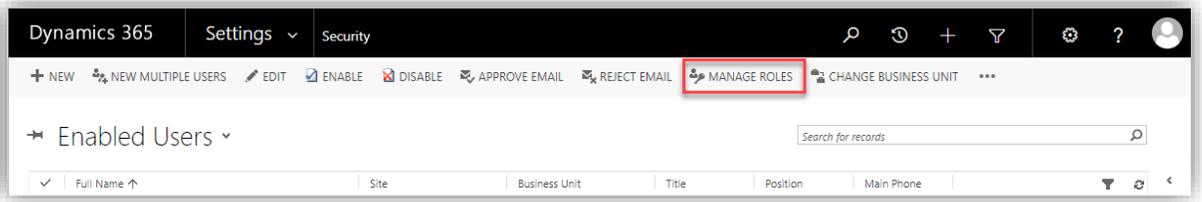
1. Navigate to **Settings->Security->Users**.



2. Select the users whom you wish to use NuSoft Alert Pro.



3. Select **Manage Roles** in the ribbon.



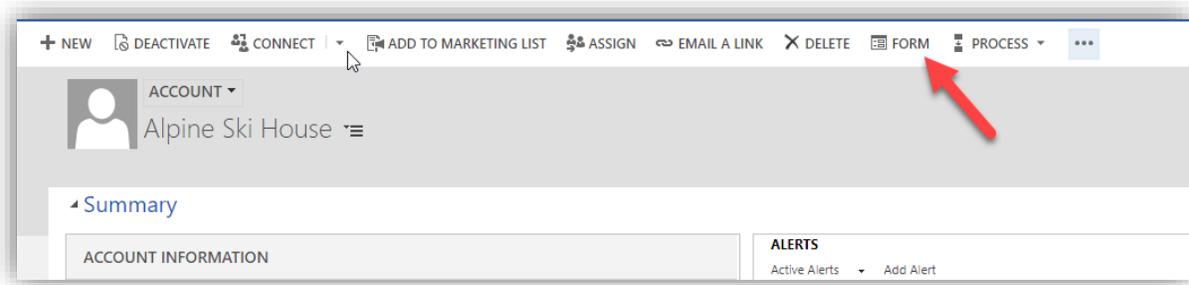
4. Choose the **NuSoft Alert Pro** role and select **OK**.

Adding Alert Box to Forms

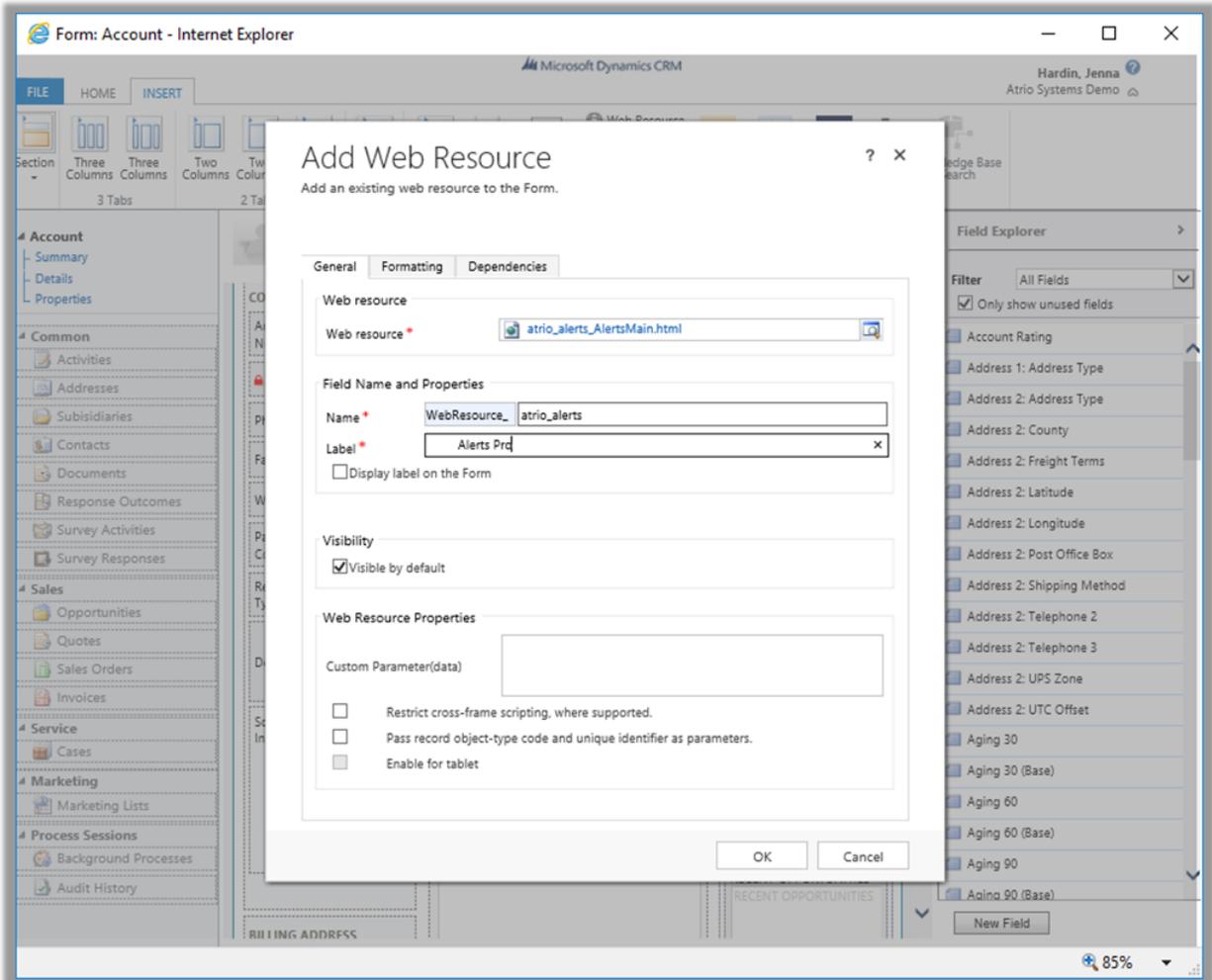
If you are a system customizer NuSoft Alert Pro will provide you with a web resource to display Alerts in the Account, Lead, Contact, or Opportunity form.

Note : Web Resource is already added in the accounts entity

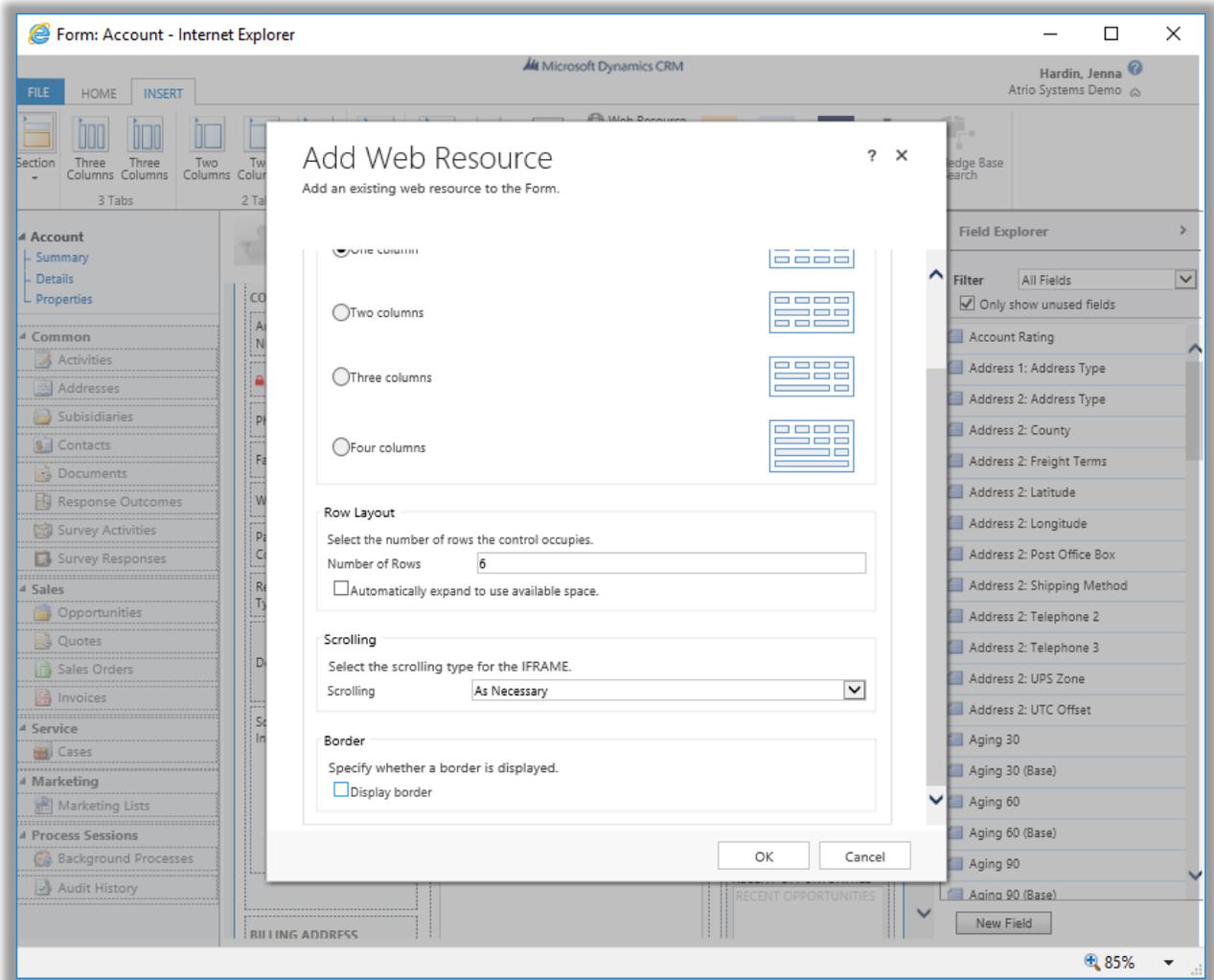
1. Go to **Sales** -> **Accounts**. Select any account to open the Account Form.
2. Click on on **Form**.



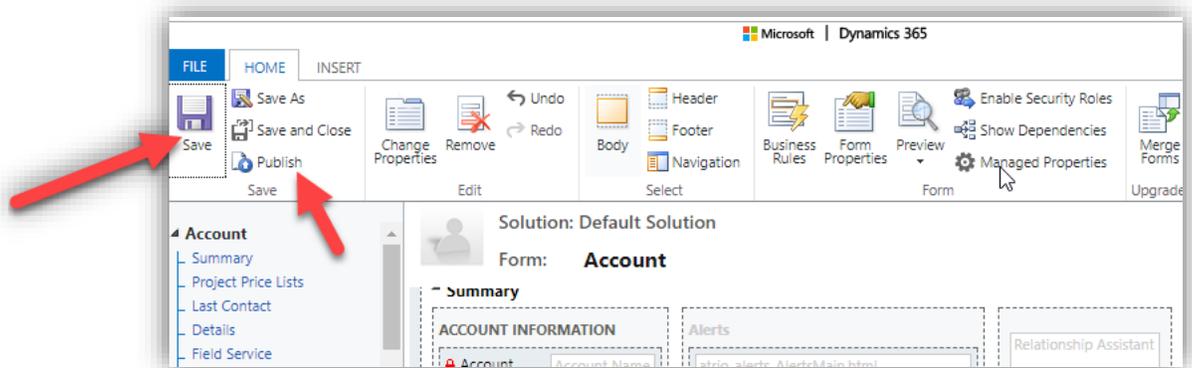
3. Go to **Insert** -> **Web Resource** component in the form and in the webresource name select the file `atrio_alerts_AlertsMain.html`.



4. Click in the **Formatting** tab and uncheck the “Display border”



5. Click **Ok** -> **Save** -> **Publish**.



6. Refresh the account page, and the web resource will be visible.

2017-11-02 New test account alert

*Full Name New Test Account

Job Title -----

Account Name  New Test Account

Email -----

Business Phone -----

Mobile Phone -----

Fax -----

Preferred Method of Contact Any

Address  -----

ALERTS

Active Alerts ▾ Add Alert

Exp. Date	Alert Text	Created By	Alert Type	 t
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7. After that Click on Add Alert.

ALERTS

Active Alerts ▾ Add Alert

Exp. Date	Alert Text	Created By	Alert Type	 t
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Write the alert text, select an expiration date and set the priority and click save.

The screenshot shows a form titled "ALERTS". It contains the following elements:

- Alert Text ***: A text input field containing the word "Test".
- Exp. Date**: A date selection interface showing a calendar for "March 2019". The date "8" is highlighted in yellow.
- Priority Selection**: Three buttons labeled "Low", "Medium", and "High". The "Low" button is highlighted with a red box.
- Buttons**: "Save" and "Cancel" buttons at the bottom right. The "Save" button is highlighted with a red box.

Now, you will be able to see the Alerts in the form and create, update or deactivate alerts for the current record in the form.

ALERTS

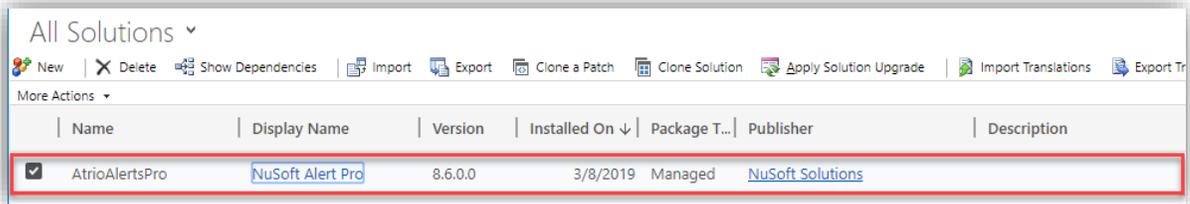
Active Alerts ▾ Add Alert

Exp. Date	Alert Text	Created By	Alert Type	
11/3/2017	Alert	Ankur Mangal	1 Low	cont

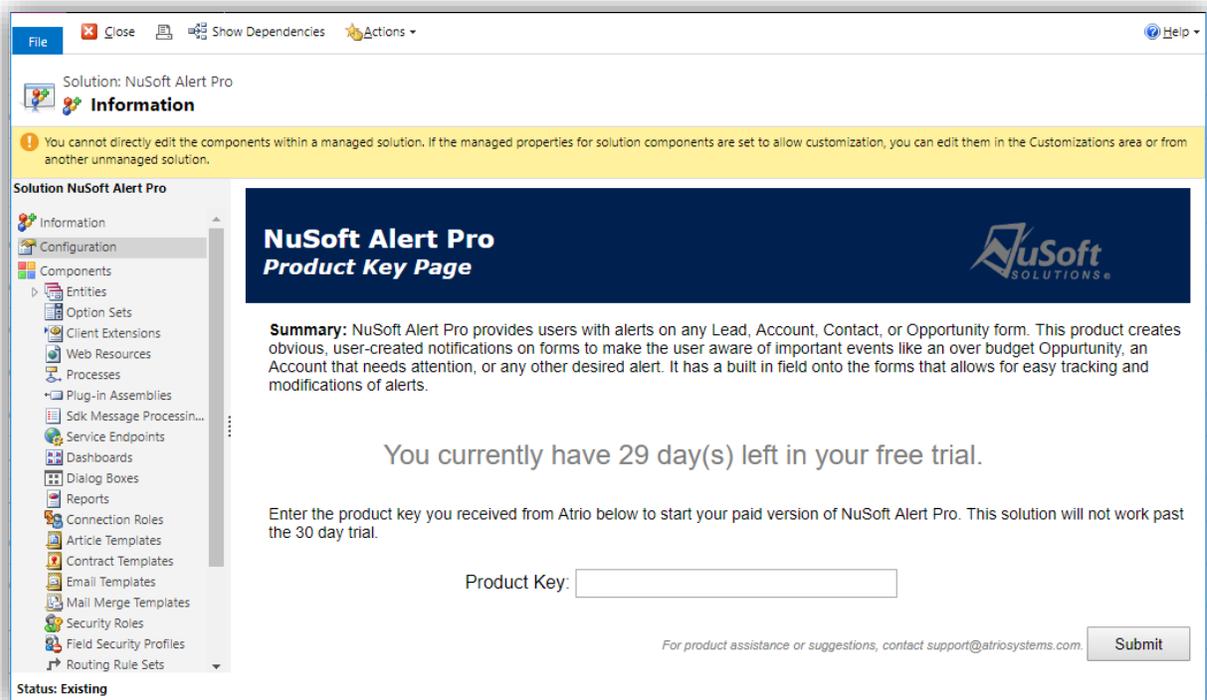
Product Key

After 30 days of use, NuSoft Alert Pro will no longer work. To enter a purchased product key, follow the steps below.

1. Navigate to the **Solutions** page again and open up the **NuSoft Alert Pro** solution.



2. The **Configuration Page** will appear. Towards the bottom of the page will be a slot for the product key. Type in the product key you received from NuSoft and click **Submit**. If you do not have a product key, contact us at support@nusoftsolutions.com to receive one.



Support

Please send any product issues and suggestions to support@nusoftsolutions.com.

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