CREATING c360 ALERTS THROUGH WORKFLOWS
Microsoft Dynamics CRM version 4.0

INTRODUCTION

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 made 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 set 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
- Alerts can be added in bulk to any Advanced Find View or query

Because the c360 Alerts product utilizes a custom entity (c360_Alert) to store the alerts belonging to entity records, a customizer can easily automate the process of creating c360 Alerts, implementing a workflow to create a record in the custom entity. The following discussion outlines the steps to accomplish this.

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1) UNDERSTAND THE c360_ALERT SCHEMA

The following shows the fields in the c360_Alert entity:

Alert

Attributes

View: All Attributes

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Name	Display Name	Type	Description
c360_alertid	Alert	primarykey	Unique identifier for entity instances
c360_entitytype	Entity Type	nvarchar	Entity type value that the Alert is associated
c360_expiredate	Expire Date	datetime	Date the Alert is set to expire
c360_expires	Expires	bit	
c360_memo	Memo	ntext	Description of the Alert
c360_name	Name	nvarchar	The name of the custom entity.
c360_recordid	Record Id	nvarchar	The GUID of the record the Alert is associated with.
c360_type	Type	picklist	The type of Alert
createdby	Created By	lookup	Unique identifier of the user who created the record.
createdon	Created On	datetime	Date and time when the record was created.
importsequencenumber	Import Sequenc...	int	Sequence number of the import that created this record.
modifiedby	Modified By	lookup	Unique identifier of the user who modified the record.
modifiedon	Modified On	datetime	Date and time when the record was modified.
overriddencreatedon	Record Created ...	datetime	Date and time that the record was migrated.
ownerid	Owner	owner	Owner Id
owningbusinessunit	Owning Busines...	lookup	Unique identifier for the business unit that owns the record
statecode	Status	state	Status of the Alert
statuscode	Status Reason	status	Reason for the status of the Alert
timezoneruleversionnumber		int	
utcconversiontimezonecode		int	

c360_entitytype: Name of the entity. E.g. 'account', 'contact', 'opportunity'
c360_expireddate: Date the alert is set to expire
c360_expires: Boolean value that sets whether the alert expires or not
c360_memo: Alert text
c360_name: Alert title (not currently used)
c360_recordid: GUID of the entity record
c360_type: 'Informational' (picklist value=1)
'Collections/Financial Issues' (picklist value=2)
'Do Not Contact' (picklist value=3)

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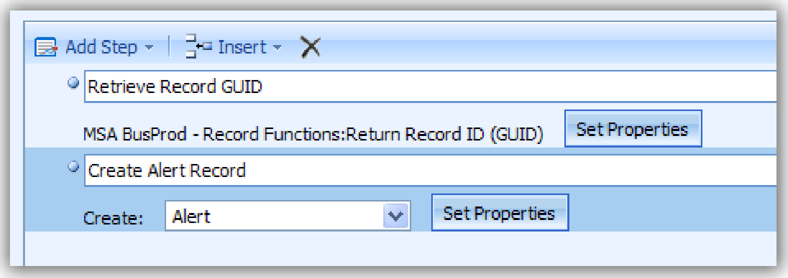
2) IMPLEMENT THE MS CRM BUSINESS WORKFLOW ACCELERATOR

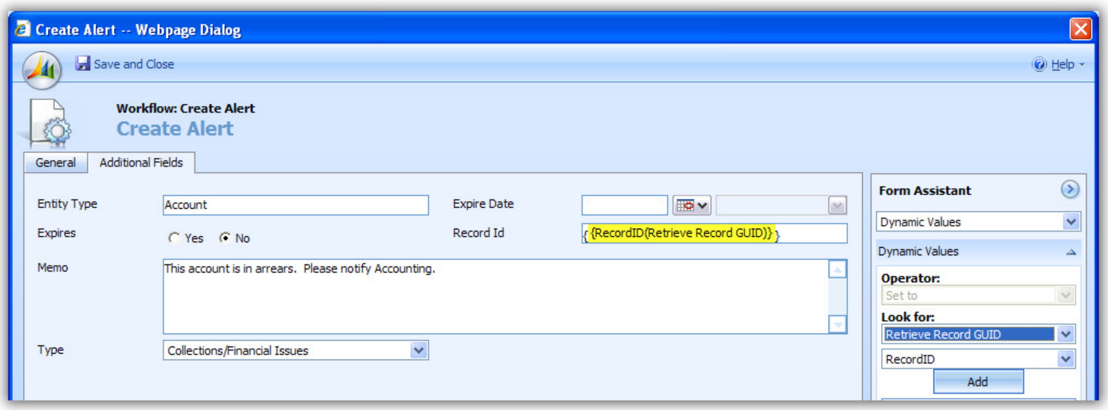
In order to create a c360 Alert, the workflow must identify the record GUID and insert into the c360_recordid field. This can be accomplished by installing the MS CRM Business Workflow Accelerator, one feature of which is the ability to retrieve the GUID from an entity record. Simply follow the instructions that come with the download. http://crmaccelerators.codeplex.com/Release/ProjectReleases.aspx?ReleaseId=26691

3) CONFIGURE THE WORKFLOW

- Create a workflow with 2 steps:



- Set the properties for the Alert record:



Note: the Record Id needs to be encapsulated by braces ({}).

- Publish the workflow.

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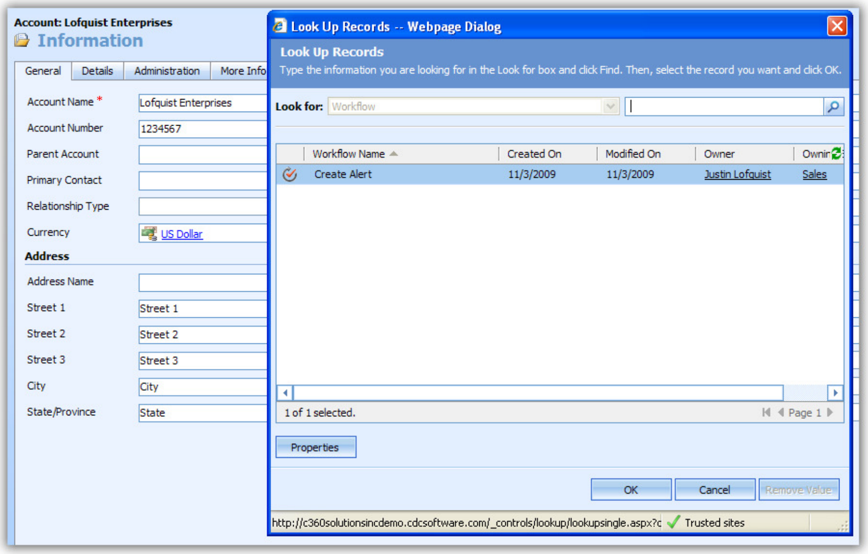
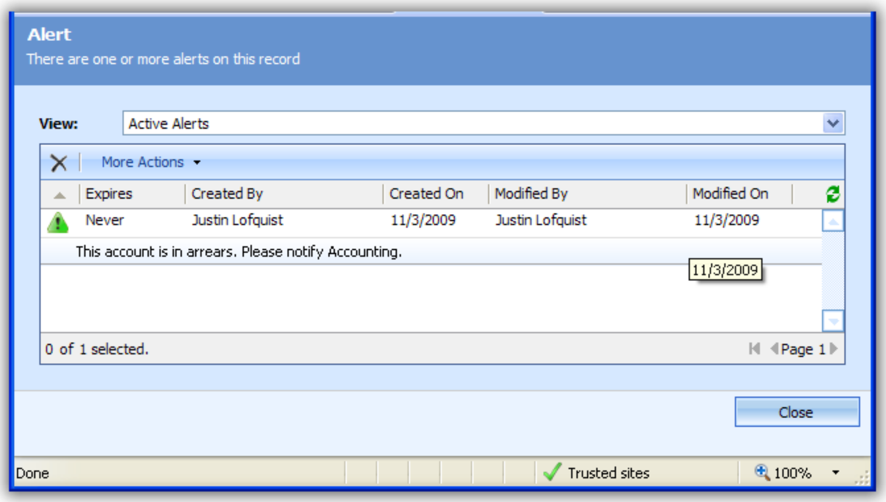
4) TEST THE RESULTS

- Run the workflow:



- Launch the account and verify the alert displays:



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