Alerts++ in Dynamics 365 Finance & Operations

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Questions?
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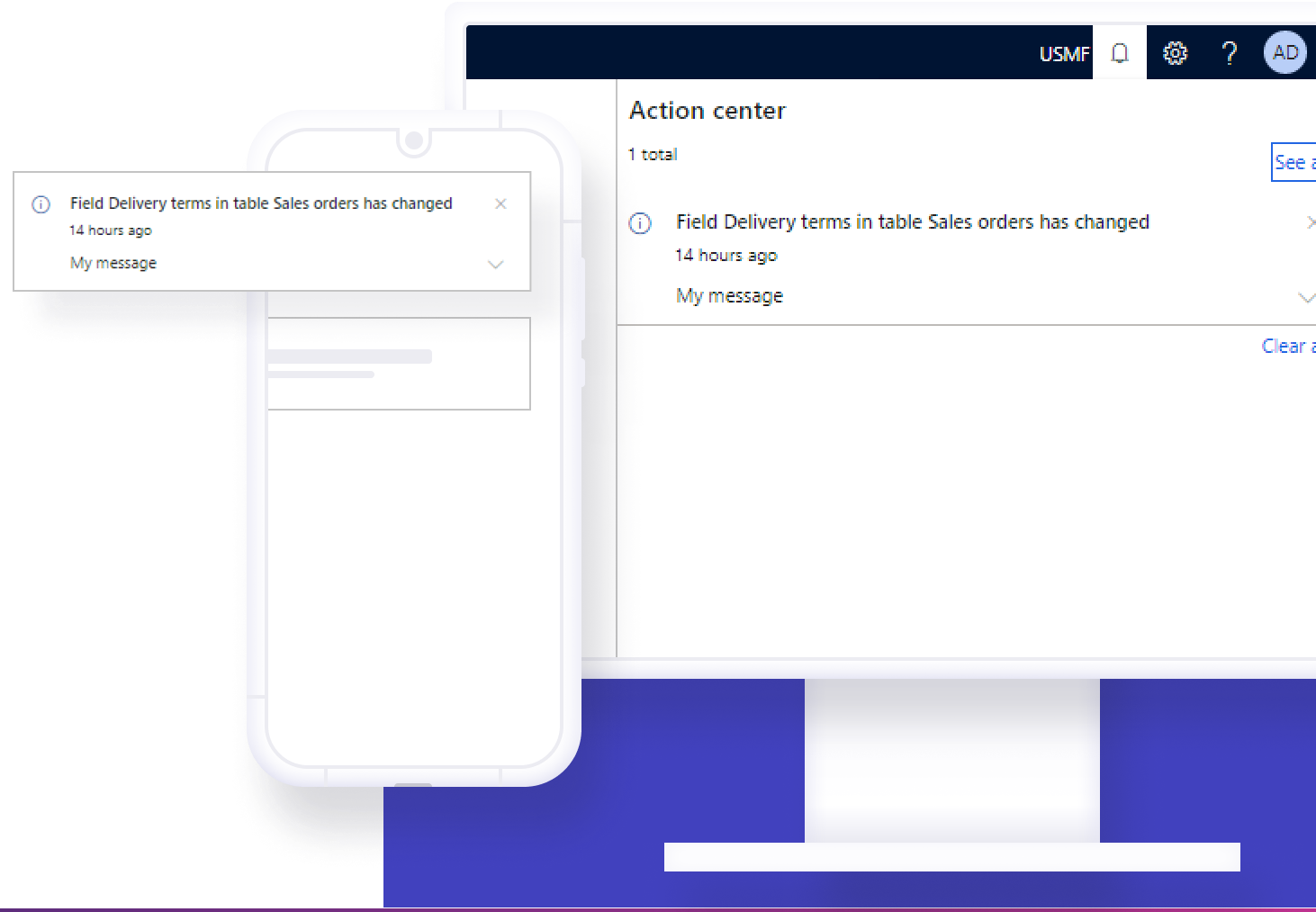
How alerts can help you

- Inform about
  - Data changes
  - Events near/past due
- Notify
  - You
  - Your colleagues
  - External partners
  - Other applications



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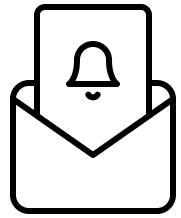
D365FO alerts story



- Popular in AX times
- First deprecated in D365FO
- Top voted missing feature on Ideas portal
- Basic support added in 2018, but without email notifications
- Email notifications added in 2019
- Still a mixture of new and legacy code. Many legacy features are there, but not working.

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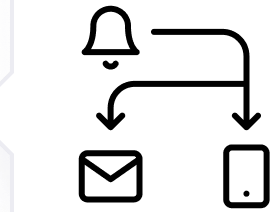
D365FO alerts



- Standard
  - Change based alerts
  - Due date alerts
  - Works on form main datasource
  - Subgrids (lines) not supported (just with SysTableBrowser trick)
  - Applies form‘s filter query
  - Basic email notification
  - Business events
- Custom
  - Simpler alert by specific field
  - Show query and other alert rule fields
  - Rich dynamic email templates
  - Placeholders for dynamic content
  - Notify additional users
  - Alerts summary email

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Demo

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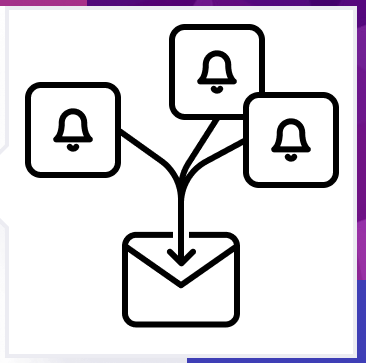
Summary



- Standard
  - Change based & Due date alerts
  - Filter records
  - SysTableBrowser trick for lines
  - Action center, Notification list, emails
  - Business events for integrations
  - Use database log for details
- Custom
  - Simpler alert creation and better overview
  - Rich dynamic email templates
  - Notify additional users
  - Alerts summary email
  - API for advanced custom scenarios
  - Use Docentric Free Edition or ask your developer

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QUESTIONS, IDEAS, DISCUSSION

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