The Largest Independent Gathering of the Microsoft User Ecosystem

COMMUNITY SUMMIT
For Users, By Users

Alerts++

Miha Vuk
D365FO Software Architect
Docentric

Decrease Complexities,
Deliver Results.

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How can alerts help you

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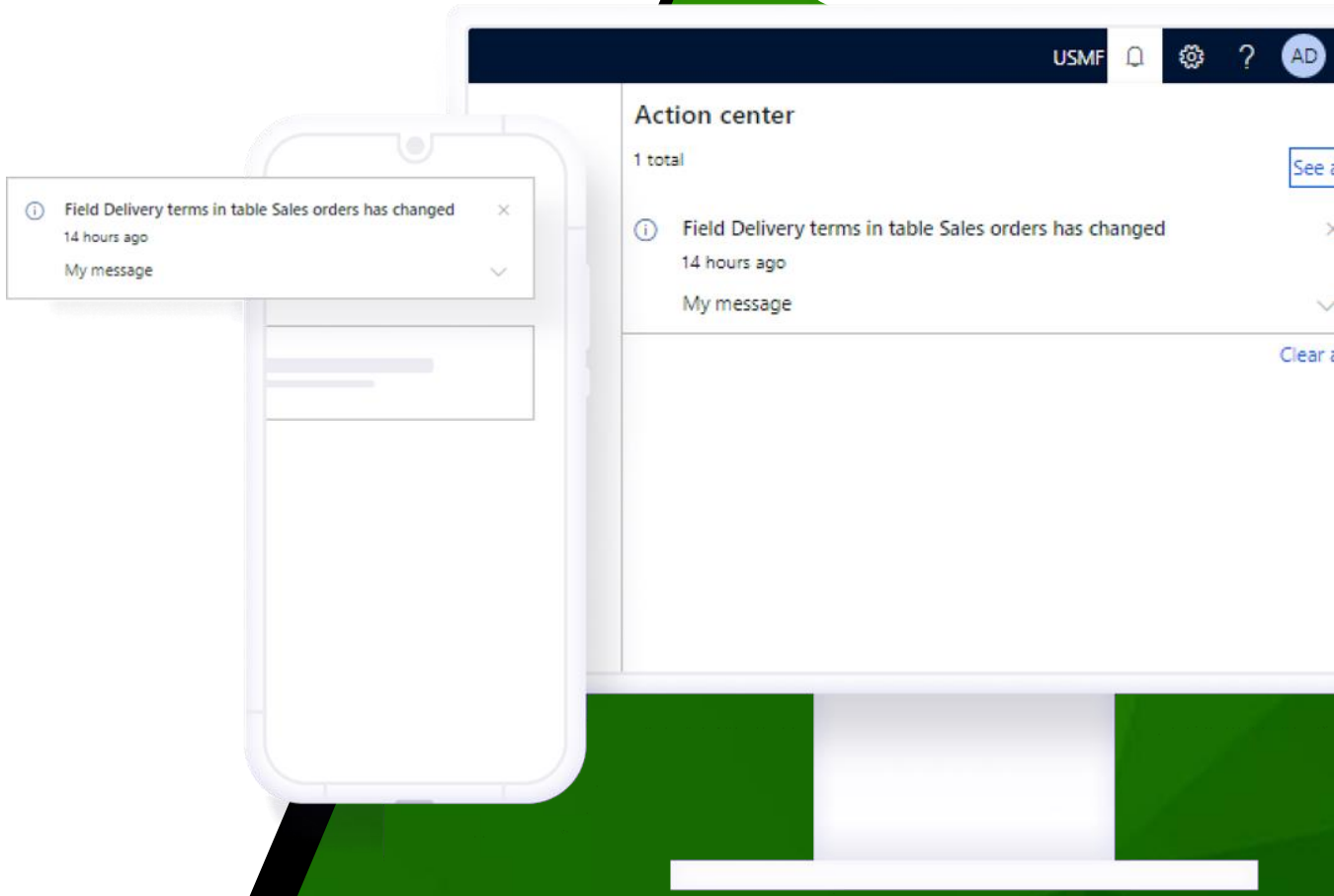
They can inform you about

- Data changes
- Events near/past due

They can notify

- You
- Your colleagues
- External partners
- Other applications



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The D365FO alerts story

- They were popular in previous AX versions.
- At first unsupported in D365FO.
- Top voted missing feature on the Ideas portal.
- Basic support was added in 2018, but without email notifications.
- Email notifications were added later on in 2019.
- Still a mixture of new and legacy code. Many legacy features are there but not fully functioning.

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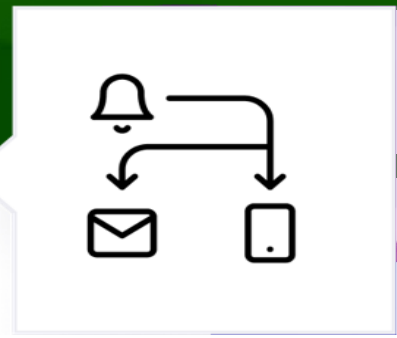
D365FO alerts



Standard

- Change based alerts
- Due date alerts
- Works on form main data source
- Subgrids (lines) are not supported (except with the SysTableBrowser trick)
- Applies the form's filter query
- Basic email notifications
- Business events
- High volume notification rules

Custom

- Simpler alerts for a specific field
- Show/edit query and other alert rule fields
- Subgrids (lines) supported
- View in grid
- Copy alert rules
- Rich dynamic email templates
- Placeholders for dynamic content
- Notify additional users
- Alerts summary email

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Summary

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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 rule creation, better overview, copy rules, edit query
- Subgrids (lines) supported
- 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

miha.vuk@docentric.com
Booth #934

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