

Tips and Tricks with Alerts and Attachments in D365FO

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Docentric AX Free Edition

Improves print destinations for all your reports
in MS Dynamics 365 for Finance and Operations.



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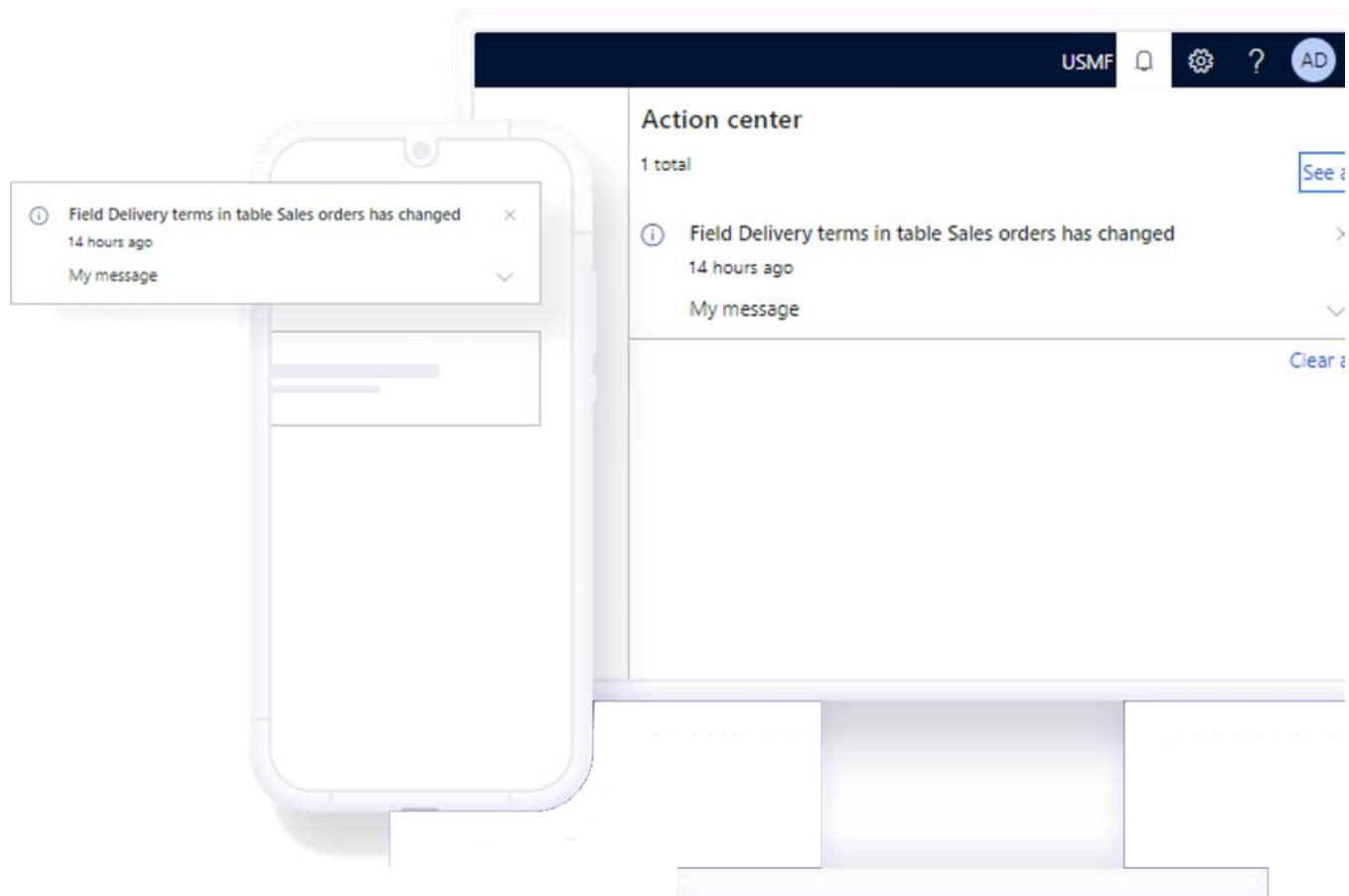


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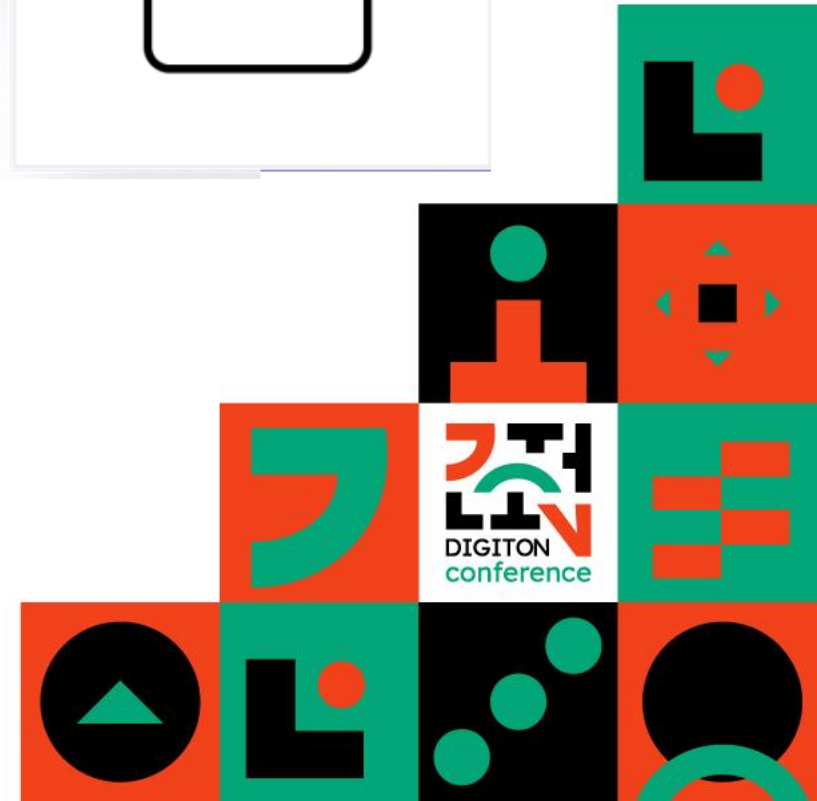
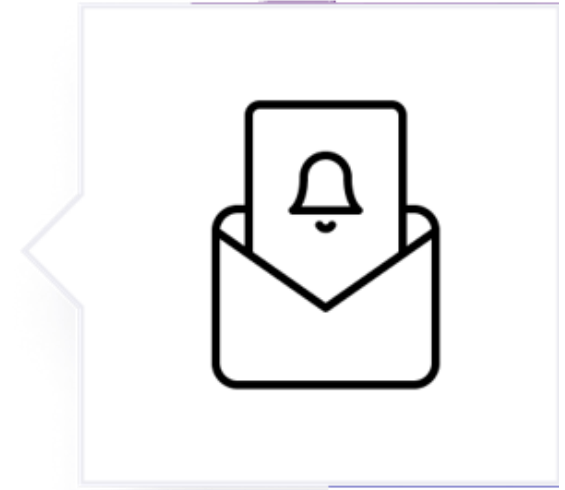
**THE
FUTURE
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ALERTS



How can alerts help you

- They can inform you about events
 - Data changes
 - Events near/past due
- They can notify
 - You
 - Your colleagues
 - External partners
 - Other applications



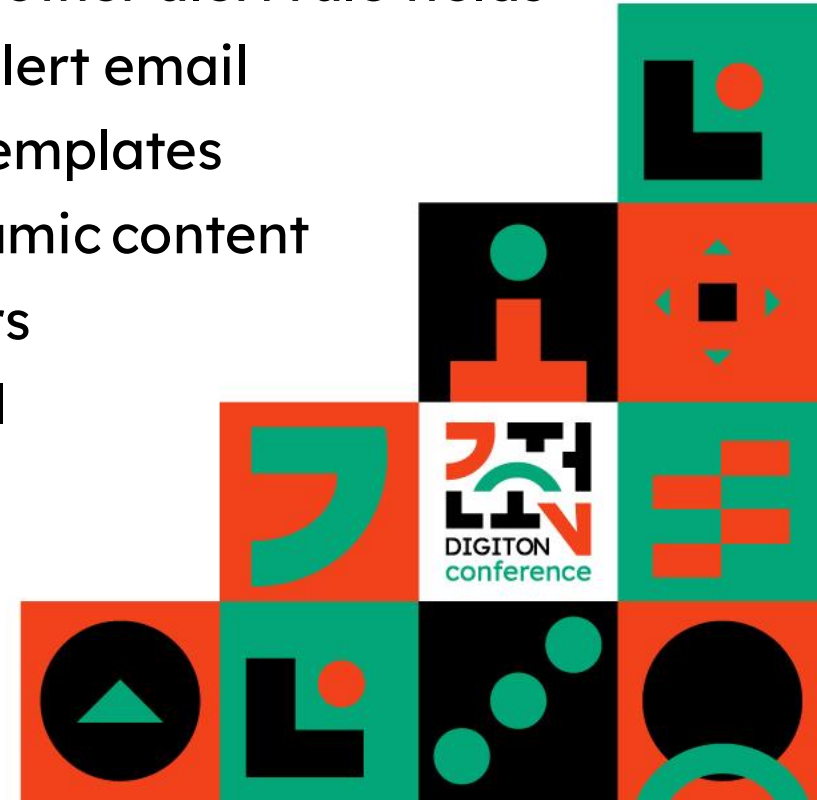
D365FO alerts

Standard

- Change based alerts
- Due date alerts
- Work on filtered view of 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

Custom

- Simplified the creation of field based alert rules - **Create alert in a single click**
- Show/edit query and other alert rule fields
- Add attachments to alert email
- Rich dynamic email templates
- Placeholders for dynamic content
- Notify additional users
- Alerts summary email



Improved Alert Emails

- Improved alert email templates (Organization and System)
- Use an advanced HTML editor to format email bodies
- Add attachments to alert email
- Placeholders
 - all standard alert placeholders are supported (%Message%, %LinkToBusinessData%)
 - Custom placeholders via ETH (Email Template Handler) classes
- Reenable alert emails to be sent via Email processing (Batch emailing sending status form)



Improved Alert Rules

- Create alert in a single click
- Configure conditional rules
- Show system fields
- Open alert notifications
- Target a user group
- View in grid
- Advanced filtering



Create alert in a single click – Bugs in D365FO

Bug #1: When a form has multiple data sources bound to the same table, regardless of which of them is selected in the **Table name** combobox, only the fields from the first data source will be listed in the **Field** combobox when creating an alert rule. – **Release product details** form, **InventTableModule** table

Bug #2: When two controls on the same form are bound to the same data field from the same data source and have the same label, one is skipped and not added to the **Field** combobox when creating an alert rule.

Solved by create alert in a single click!




Create alert in a single click - Limitations

The **Create a custom alert** context menu option is not supported for:

- Unbound form controls (not bound to a data source field).
- Form controls bound to a display method.
- Form controls added in the runtime.

Configure conditional alert rules

 STANDARD >> If you filter a form before creating an alert rule (e.g. you filter **Sales orders** by **Status = Open order**), you will create a conditional alert rule. **This is not exposed feature**

 DOCENTRIC >> enables an easier way to configure alert rules' condition via the built-in **Query** form (**SysQueryForm**)

Open Alert Notifications

STANDARD >> When alert notification is created for a user, it appears in the user's **Action center**. When the user reads it, it disappears from the **Action center**, but it's retained in the **EventInbox** table, which contains alert, workflow and batch alert notifications, and it can be seen on the **Notification list** form (**EventAlertInbox**).

DOCENTRIC >> For each alert rule, you can open the **Notification list** form directly from the **Manage my alerts / Alert rules** form, showing all alert notifications based on this alert rule. You can edit or delete them or change their status to **Unread** or **Read**.

Target a user group

STANDARD >> In the **Alert me with** section on (1) the **Create alert rule** dialog form and (2) the **Manage my alerts / Alert rules** form, you can specify which user should receive the alert notifications (the **User ID** field). By default, the current user ID is selected. The ability to change the user receiving the alert is restricted to administrators

DOCENTRIC >> Beside the user who will be receiving the alert notifications in the **Action center** when the event of the active alert rule occurs and the rule condition is met (if configured), you can also configure a user group (the **User group ID** field), whose members will also be alerted

Advanced filtering

Manage my alerts form

My rules, User group originated, All

Alert rules form

Filter by user - where an administrator first selects a particular user and afterwards apply additional filter per alert rule ownership and user group membership, if needed.

Bulk filter - where an administrator first apply filter per alert rule ownership and user group membership and afterwards apply additional filter per user, if needed.

Alert Summary Emails – Full Edition

- Send multiple alert notifications in a single email
- Periodical summary emails are sent by **Alert summary email distributor** batch job
- Can be configured on **Create alert rule** and **Manage my alerts / Alert rules** forms
- Use **System email templates – Alert summary emails** flag set to true
- **DocAlertSummaryETH** class as class for placeholders
- **DocAlertSummaryEmailBodyHTM** as default email body template



Improved Alert Security

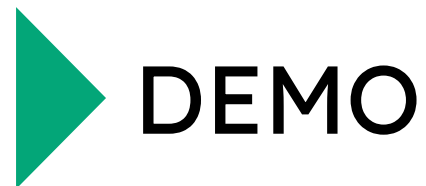
- Role: **Docentric AX Alert Administrator (DocentricAXAlertAdmin)**, with a purpose to enable regular users to manage all alert rules in the same way as **System administrator**.
- Privilege: **Docentric AX Alert User Group Maintain (DocentricAXAlertUserGroupMaintain)**, with a purpose to enable regular users to manage **User group ID** (set/change/clear) on their alert rules.
- **Alert rules** form accessible by **SystemAdministrators** and **Docentric AX Alert Administrator**
- **Manage my alerts** form is accessible by all users.
- **Alert Summary Email Distributor** job is accessible by **Docentric AX Alert Summary Email Distributor** privilege



ATTACHMENTS

Basic use and scenarios

- Add attachment
- Open attachment
- Copy attachment
- Delete attachment
- Add attachments to email (customization)
- Download multiple attachments (customization)
- All attachments (customization)

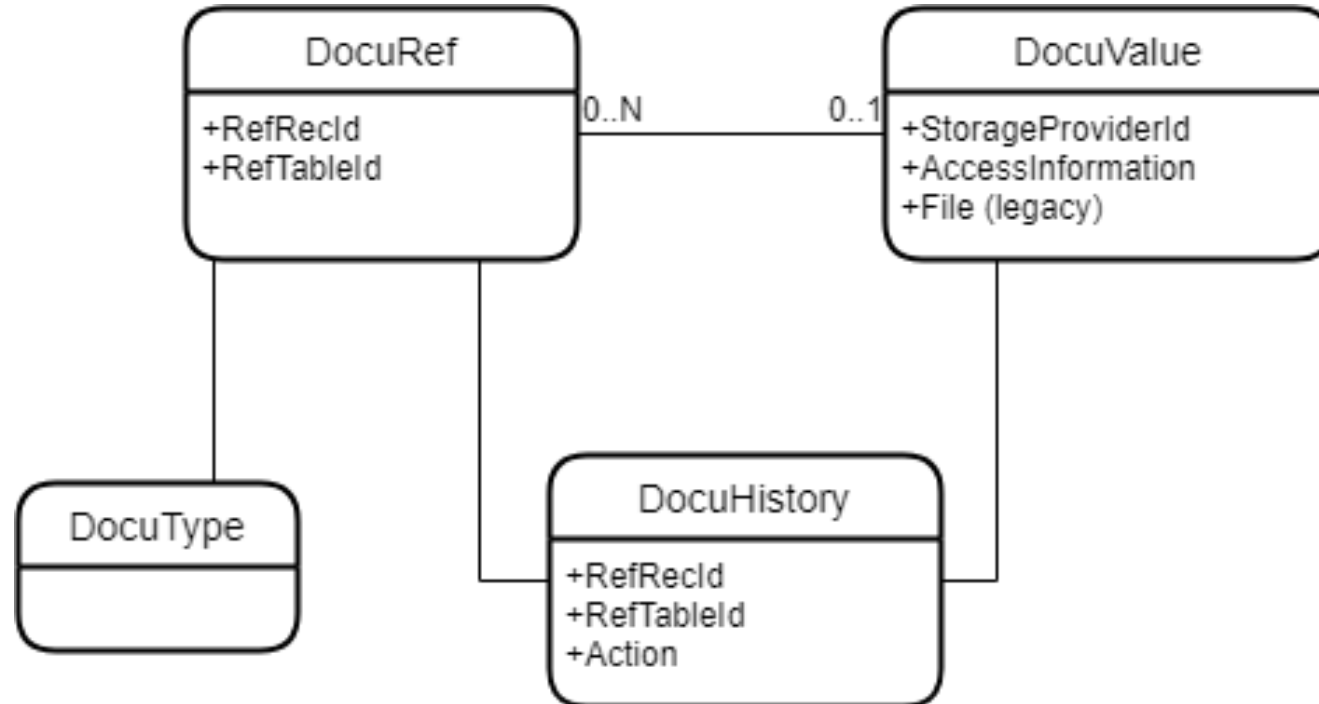


Additional attachments rules and metadata

- ▶ **DOCENTRIC >>** Specify which documents should be attached to outgoing emails from within D365FO, directly on the **Print destination settings** form

▶ **DEMO**

DATA MODEL



Where else attachments are used

- Product image
- Worker image
- Print archive

 DEMO



ANY
QUESTIONS?



THANK YOU FOR YOUR ATTENTION.

DIGITON CONFERENCE

20-21-OCT-2023

Marriot Hotel

Skopje,
N.Macedonia

