



# **Atrio Alert**

Version 8

## **Installation and Configuration Guide**

# Table of Contents

---

<b>Introduction</b> .....	3
<b>Requirements/Compatibility</b> .....	3
<b>Installing Atrio Alert</b> .....	3
___ Backing up Entities .....	3
___ Installing Atrio Alert .....	9
___ Reimporting Entities .....	13
<b>Support</b> .....	14
<b>Disclaimer</b> .....	14

## Introduction

---

This document is designed as a guide for Microsoft Dynamics CRM users to install Atrio Alert. It includes step by step instructions on how to complete the installation of Atrio Alert.

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

Features:

- Display custom note/alert on the top of a record (Accounts, Contacts, Leads or Opportunities) up to 200 characters.
- Ability to copy note/alert from Account record to related Contacts with workflow.

## Requirements/Compatibility

---

Atrio Alert is compatible with CRM 2016.

The following browsers are supported:

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

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

## Installing Atrio Alert

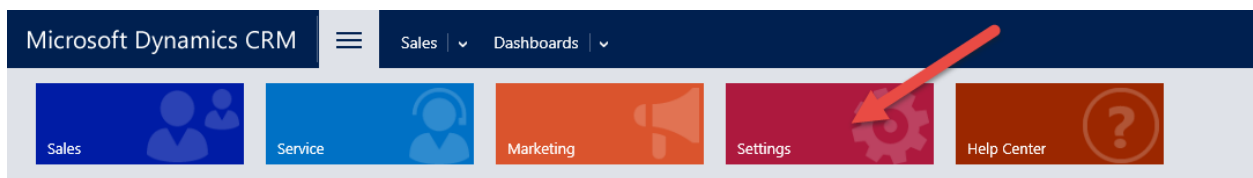
---

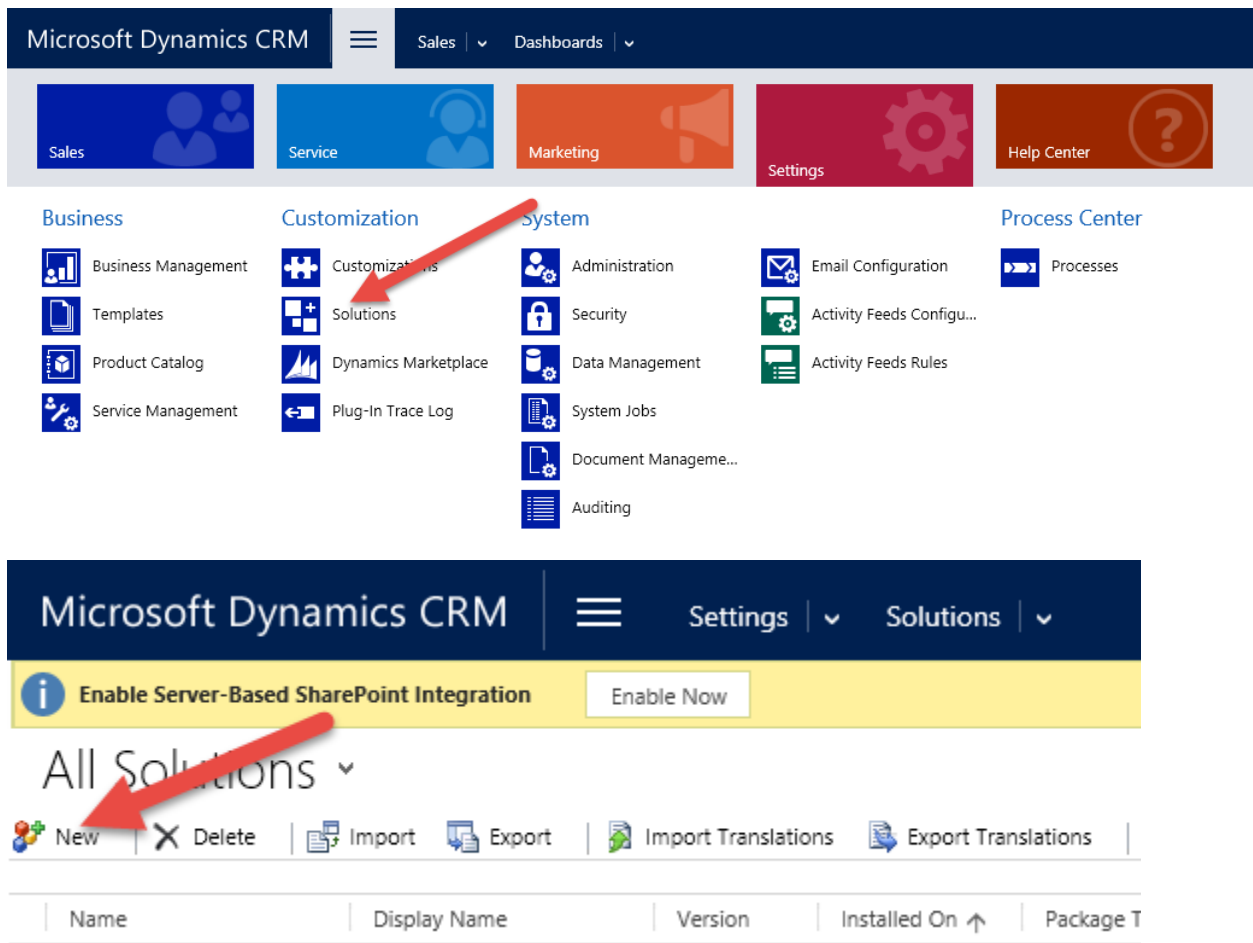
### Backing up Entities

Importing the Atrio Alert solution can cause changes to be made to the following entities forms if they have been customized: Accounts, Contacts, Leads, and Opportunities.

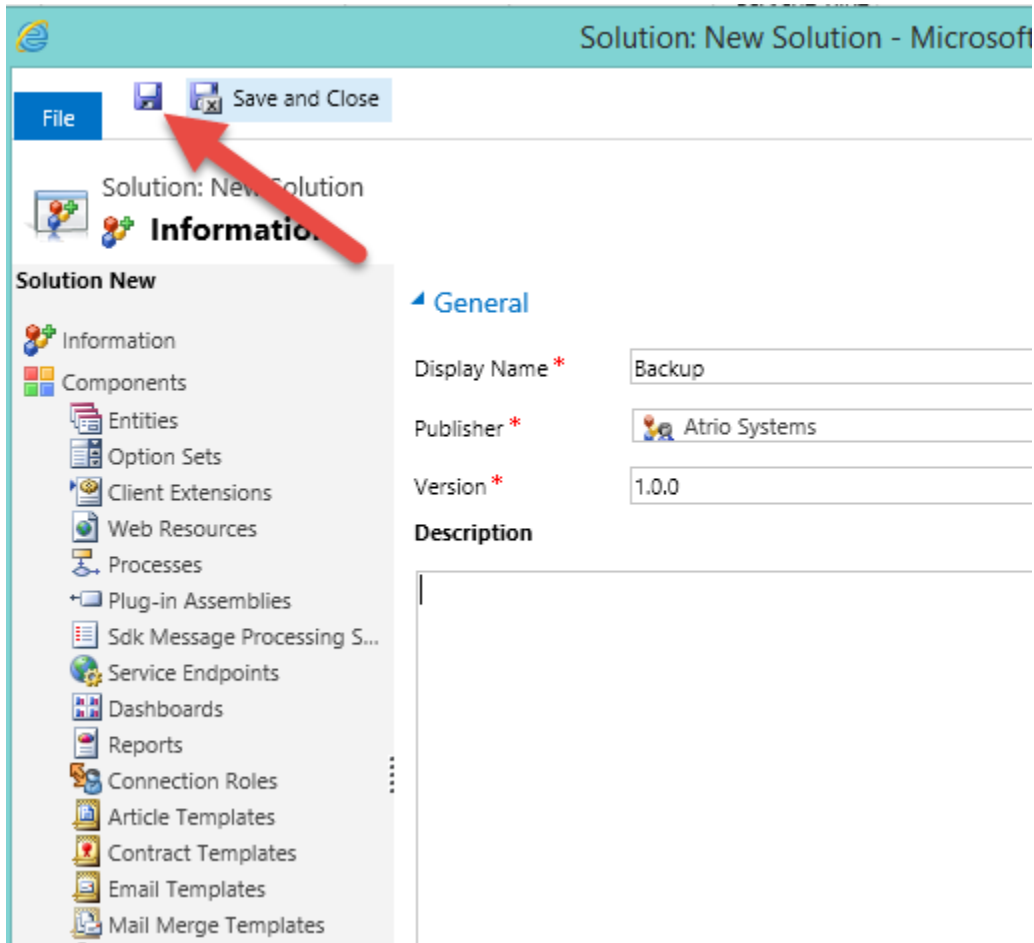
To prevent this from happening, the 4 entities should be backed up and re-imported after importing Atrio Alert.

1. Navigate to **Settings -> Solutions** and create a new Solution.

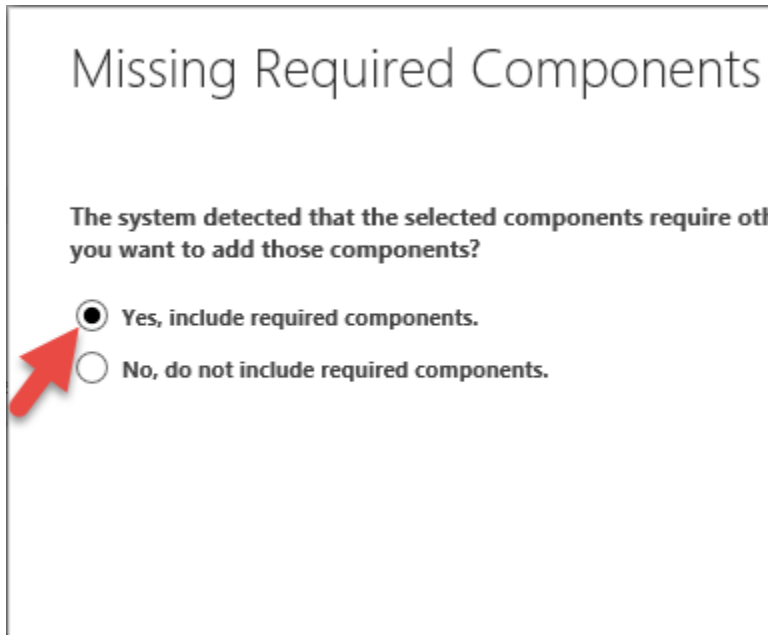
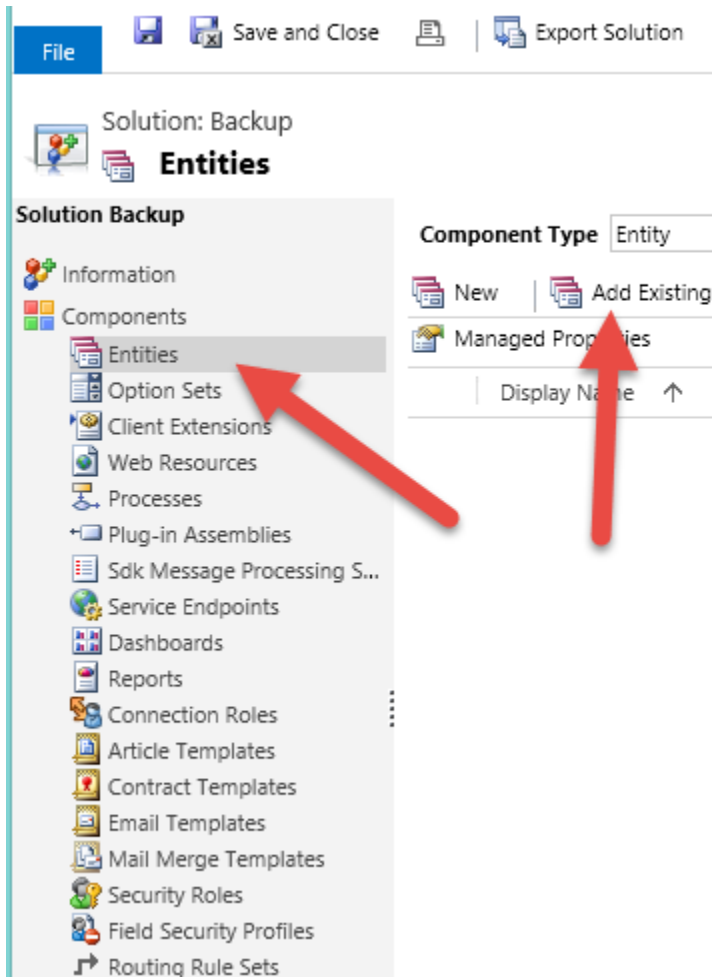




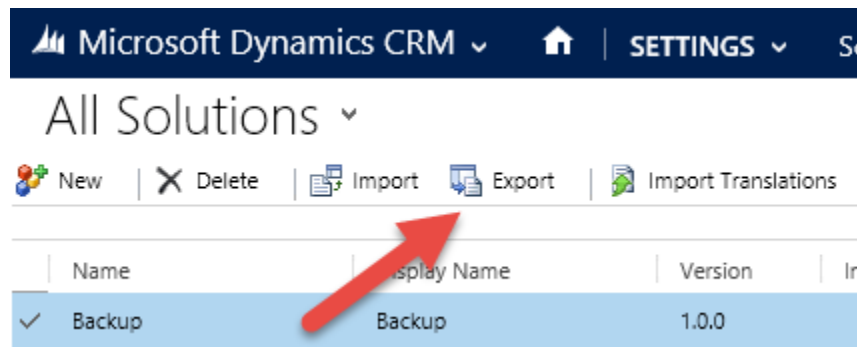
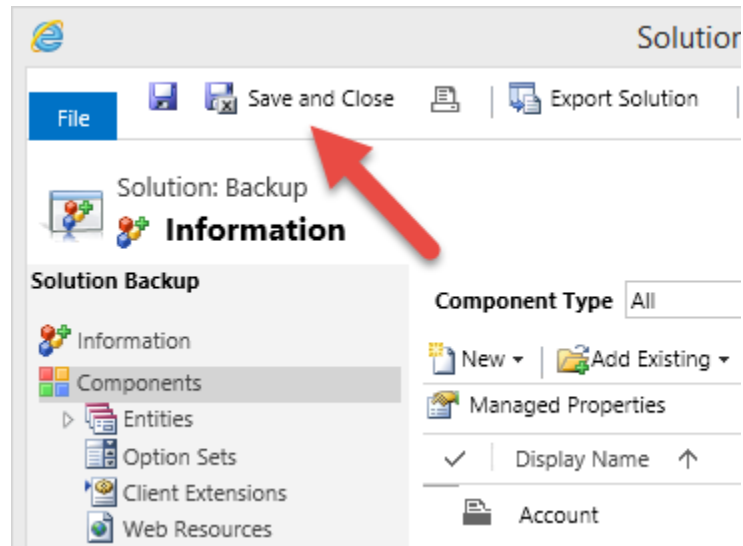
2. Name the solution Backup, add values to all required fields and click **save**.



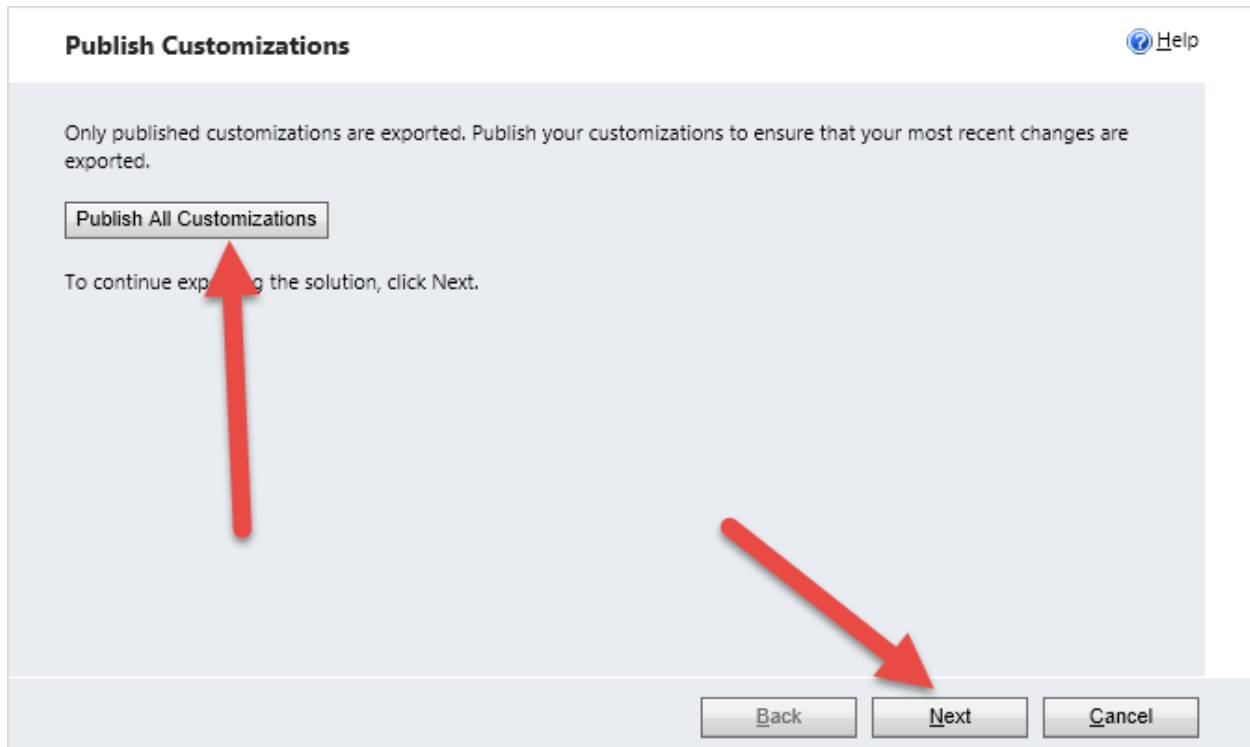
3. After saving click **Entities** and then **Add Existing** and select **Accounts, Contacts, Leads and Opportunities** from the list. Select **Yes, include required components**



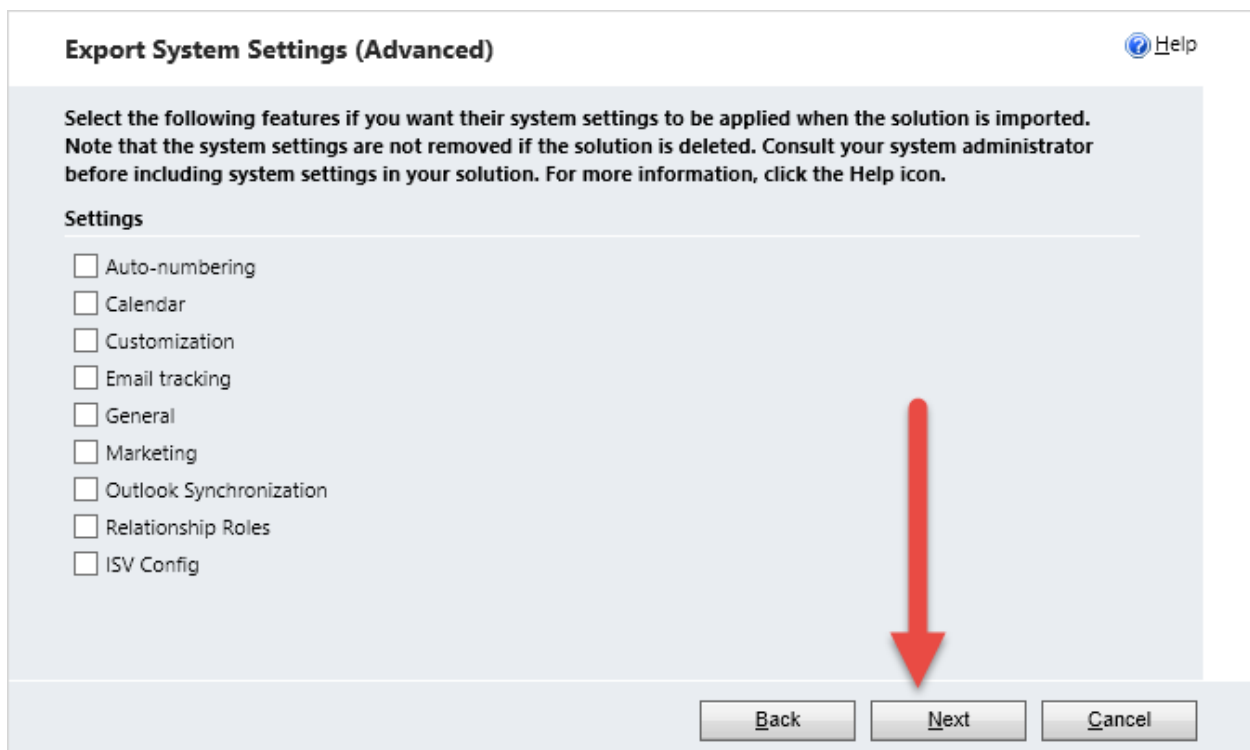
4. Click **Save and Close** and then select the Backup solution click **Export**



5. Click **Publish All Customizations** then click **Next**

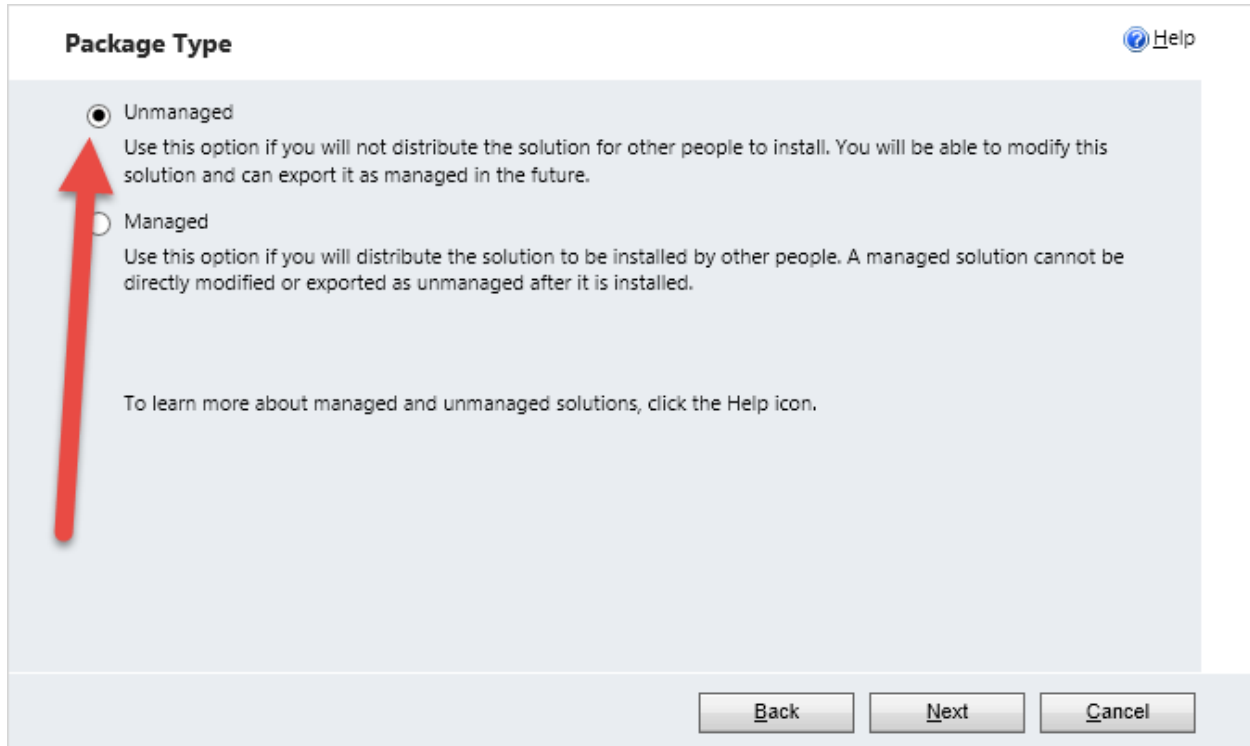


6. Follow the wizard instructions and add any required components if required and ignore advanced settings.





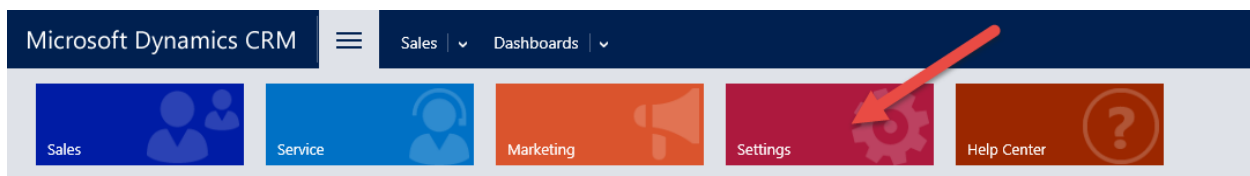
7. Export as an **unmanaged solution** and your current CRM version

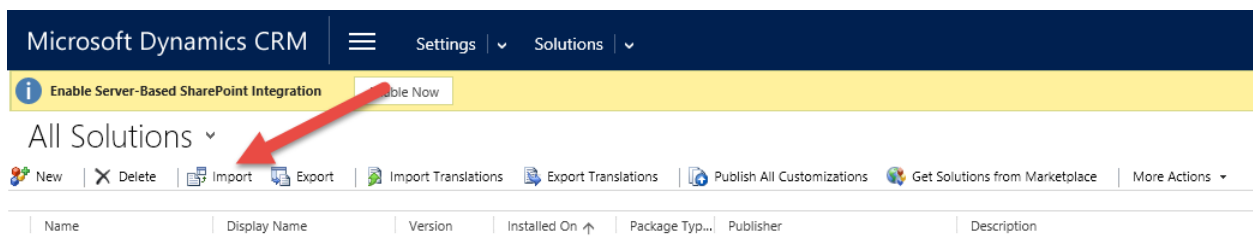
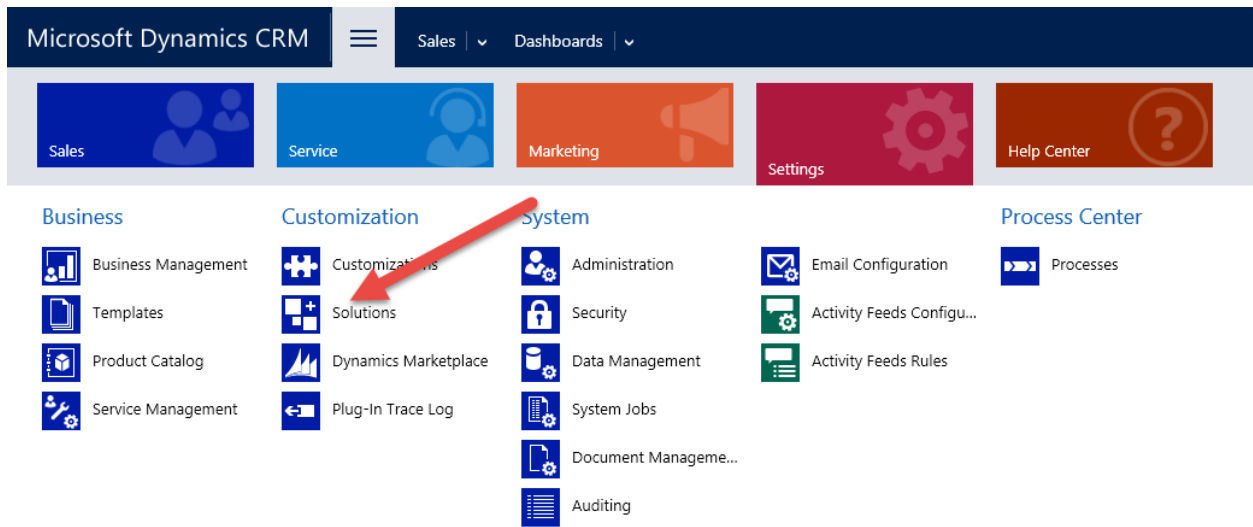


8. Click **Export** and save the file.

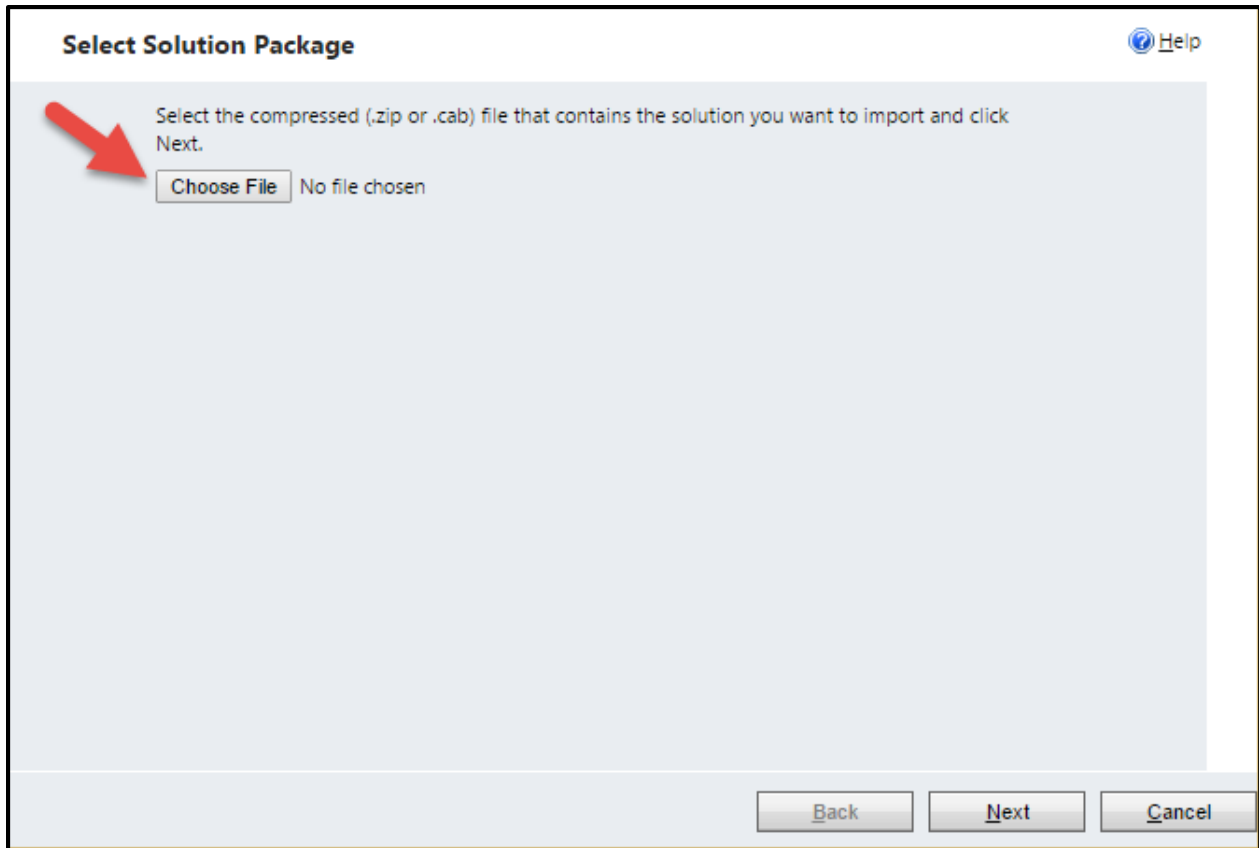
## Installing Atrio Alert

1. Navigate to **Settings -> Solutions**

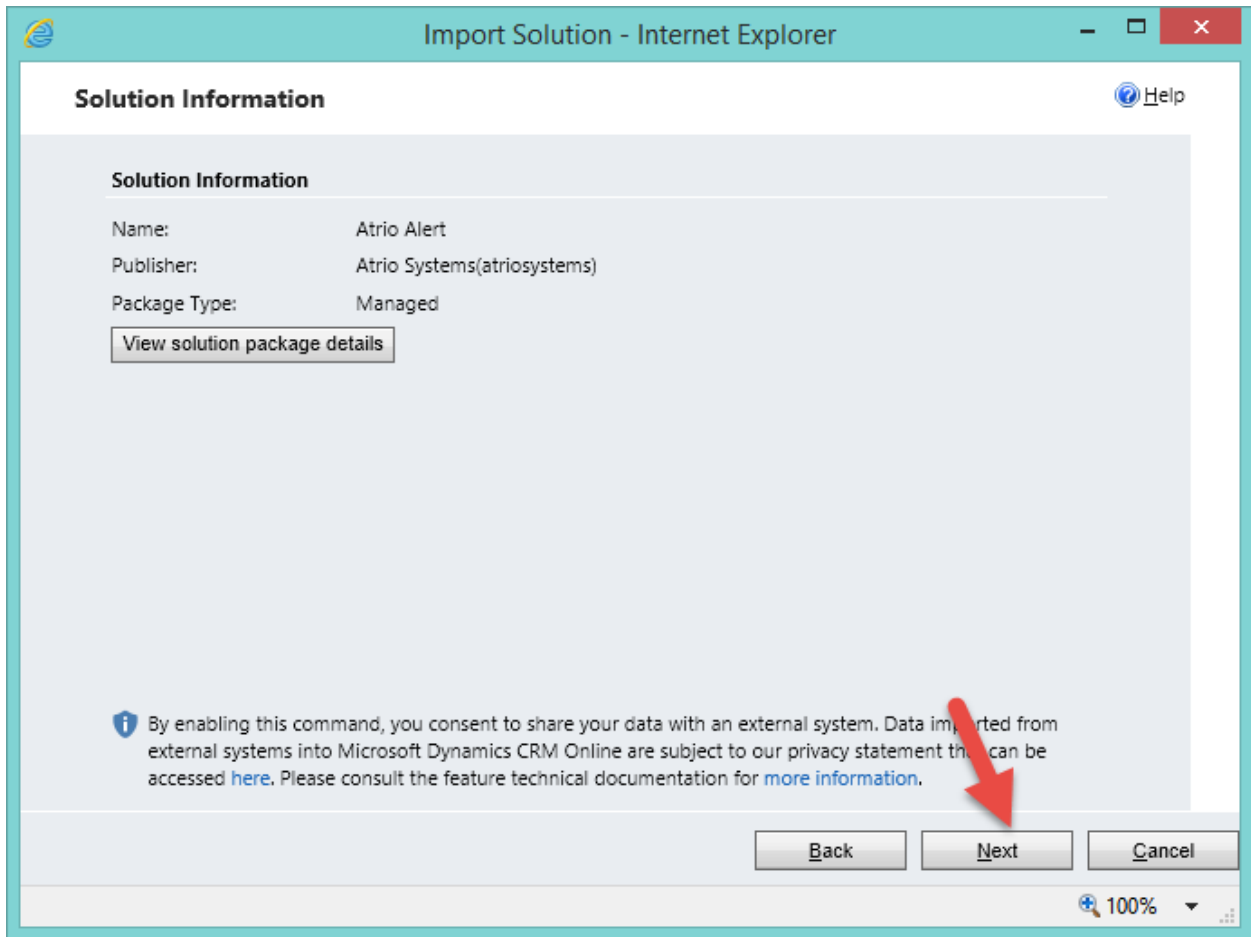




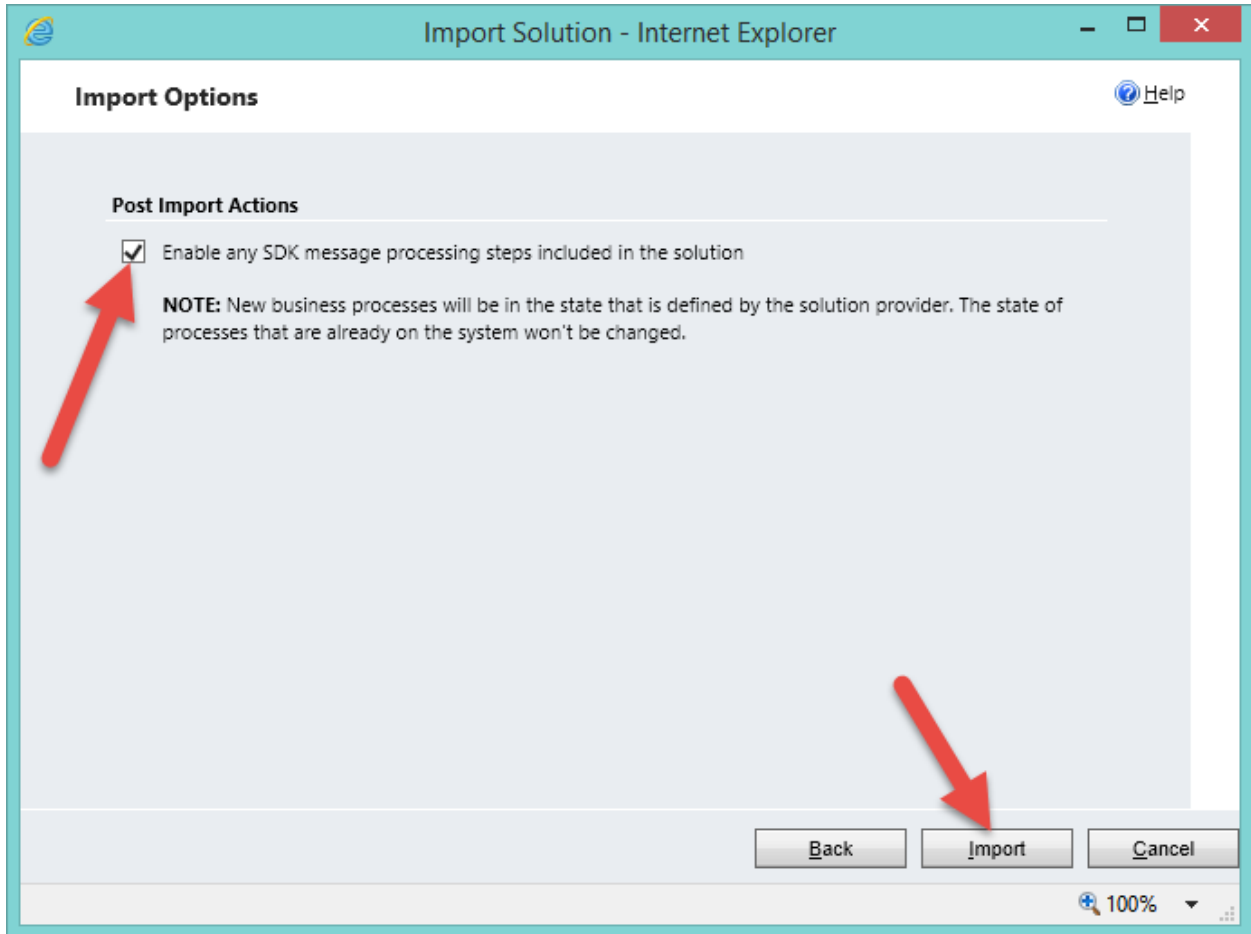
2. Select the downloaded Atrio Alert managed solution file.



3. Click next to continue with installation



4. Leave box checked and click **Import** and the import wizard will finish installing Atrio Alert.



5. A dialogue box will open. Hit **Close**. Atrio Alert will be properly installed when the Atrio Alert solution shows up on the **All Solutions** page.

AtrioMap	<a href="#">Atrio Map</a>	8.2.0.1	4/26/2016	Managed	<a href="#">Atrio Systems</a>
AtrioCalendar	<a href="#">Atrio Calendar</a>	8.0.0.0	5/16/2016	Managed	<a href="#">Atrio Systems</a>
User	<a href="#">User</a>	1.0.0.0	4/21/2016	Unmanaged	<a href="#">Atrio Systems</a>
AtrioAlertsPro	<a href="#">Atrio Alerts Pro</a>	8.0.0.0	2/2/2016	Managed	<a href="#">Atrio Systems</a>
AtrioAlert	<a href="#">Atrio Alert</a>	8.0.0.0	8/17/2015	Managed	<a href="#">Atrio Systems</a>
Settings	<a href="#">Settings</a>	1.0.0.0	8/11/2015	Unmanaged	<a href="#">Default Publisher for atriosystems0</a>

## Reimporting Entities

If your CRM views or forms become modified after importing Atrio Alert and publishing customizations, import your backup unmanaged solution created above in the “Backing Up Entities” section.

## Support

---

Free products are provided without support, but we value your feedback. Please send product issues and suggestions to [support@atriosystems.com](mailto:support@atriosystems.com). We will take your suggestions to make the product better.

## Disclaimer

---

THIS SOFTWARE IS PROVIDED "AS IS", AND ATRIO SYSTEMS, INC. DISCLAIMS ALL WARRANTIES WITH REGARD TO THIS SOFTWARE INCLUDING ALL IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. IN NO EVENT SHALL ATRIO SYSTEMS, INC. BE LIABLE FOR ANY SPECIAL, INDIRECT, OR CONSEQUENTIAL DAMAGES OR ANY DAMAGES WHATSOEVER RESULTING FROM LOSS OF USE, DATA OR PROFITS, WHETHER IN ACTION OF CONTRACT, NEGLIGENCE, OR OTHER TORTIOUS ACTION, ARISING OUT OF OR IN CONNECTION WITH THE USE OR PERFORMANCE OF THIS SOFTWARE.