



Atrio Alert Pro

Version 8

User Guide

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Introduction

This document is designed as an introductory guide for Microsoft Dynamics CRM users to learn how to use the Atrio Alert Pro product.

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

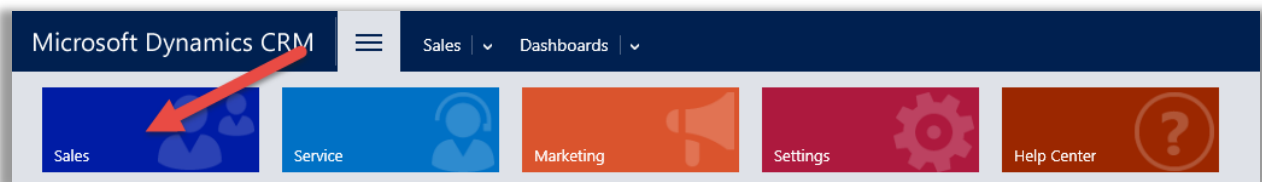
Features:

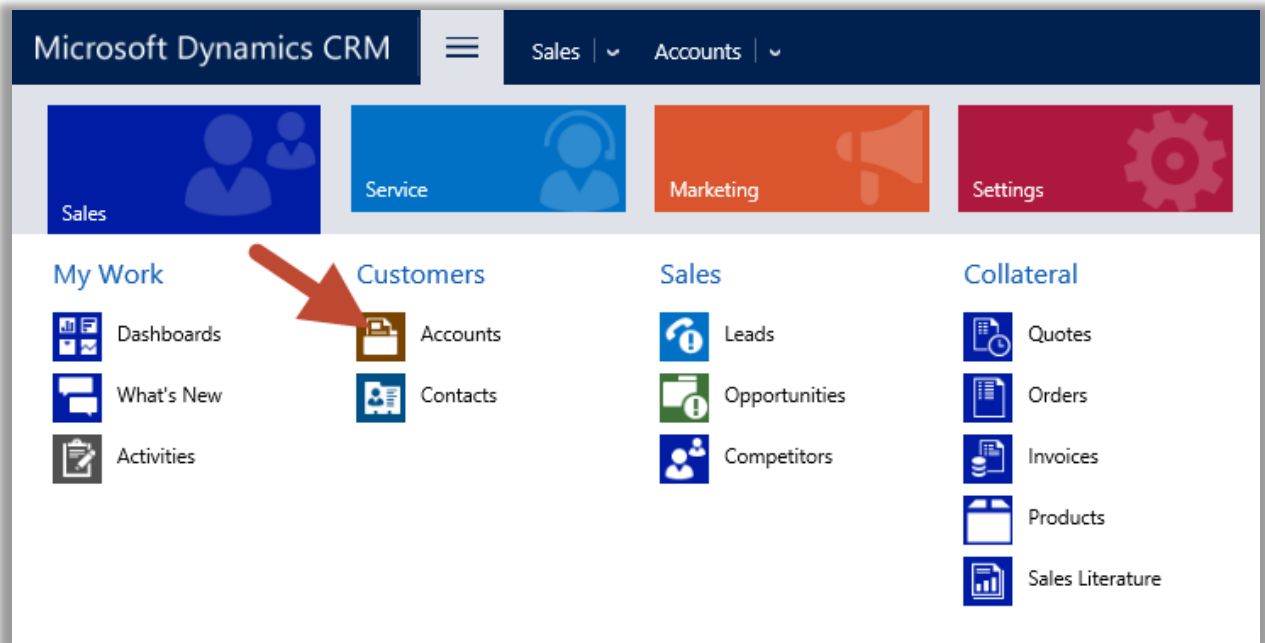
- Display multiple custom note/alert in a subgrid inside the form(Accounts, Contacts, Lead, and Opportunity) up to 500 characters.
- Different views and easy modification of alerts
- A colored escalation level for each alert
- An expiration date on the alerts to deactivate when they are no longer relevant

Using Atrio Alert Pro

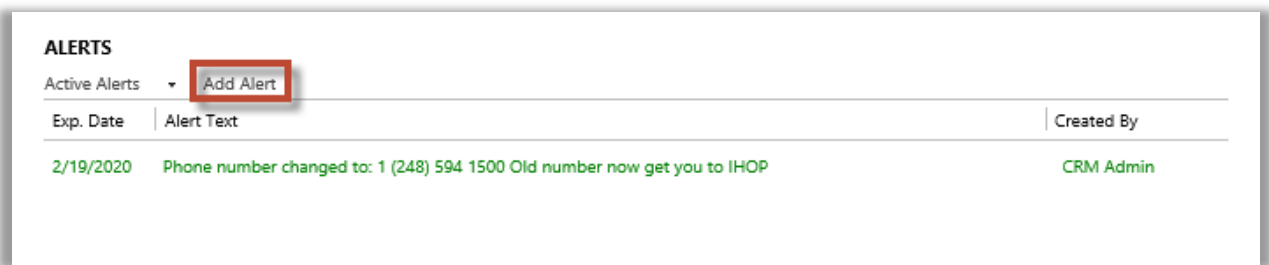
Creating New Alerts

1. To add an alert message to a Lead, Account, Contact, or Opportunity record navigate to **Sales**, then any one of the entites the Alert Pro table has been added (see the installation and configuration guide for instructions). For this example we used **Accounts**.





2. Open the form of the desired entity that needs the alert. Under **ALERTS**, select **Add Alert**.



3. Enter the alert in the text box, select the date the alert will expire, and choose the priority level. Select **Save** when finished.

ALERTS

Alert Text *

This Account has gone over budget

Exp. Date 08/11/2016 Low Medium High

Save Cancel

The alert will appear in the box. Alerts will become inactive after their expiration date.

ALERTS

Active Alerts ▾ Add Alert

Exp. Date	Alert Text	Created By
8/11/2016	This Account has gone over budget	CRM Admin
2/19/2020	Phone number changed to: 1 (248) 594 1500 Old number now get you to IHOP	CRM Admin

Filtering Alerts

Selecting the drop down menu below the current view will open a list of other views. Use these to filter your alerts.

ALERTS

Active Alerts ▾ Add Alert

- Active Alerts
- Inactive Alerts
- My Active Alerts
- My Inactive Alerts

Deactivating Alerts

Double click on the alert you wish to remove, and click **Deactivate**.

ALERTS

Alert Text *

This Account has gone over budget

Save Deactivate Cancel

Support

Please send any product issues and suggestions to support@atriosystems.com.

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