



# **Atrio Alert**

Version 8

## **User Guide**

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## Introduction

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This document is designed as an introductory guide for Microsoft Dynamics CRM users to learn the basics of using Atrio Alert.

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

Features:

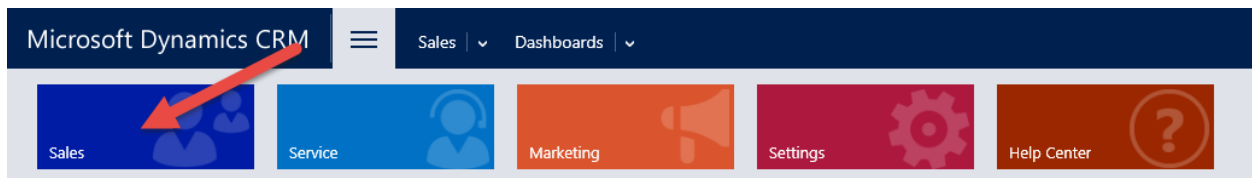
- Display custom note/alert on the top of a record (Accounts, Contacts, Leads or Opportunities) up to 200 characters.
- Ability to copy note/alert from an Account record to related Contacts with workflow.

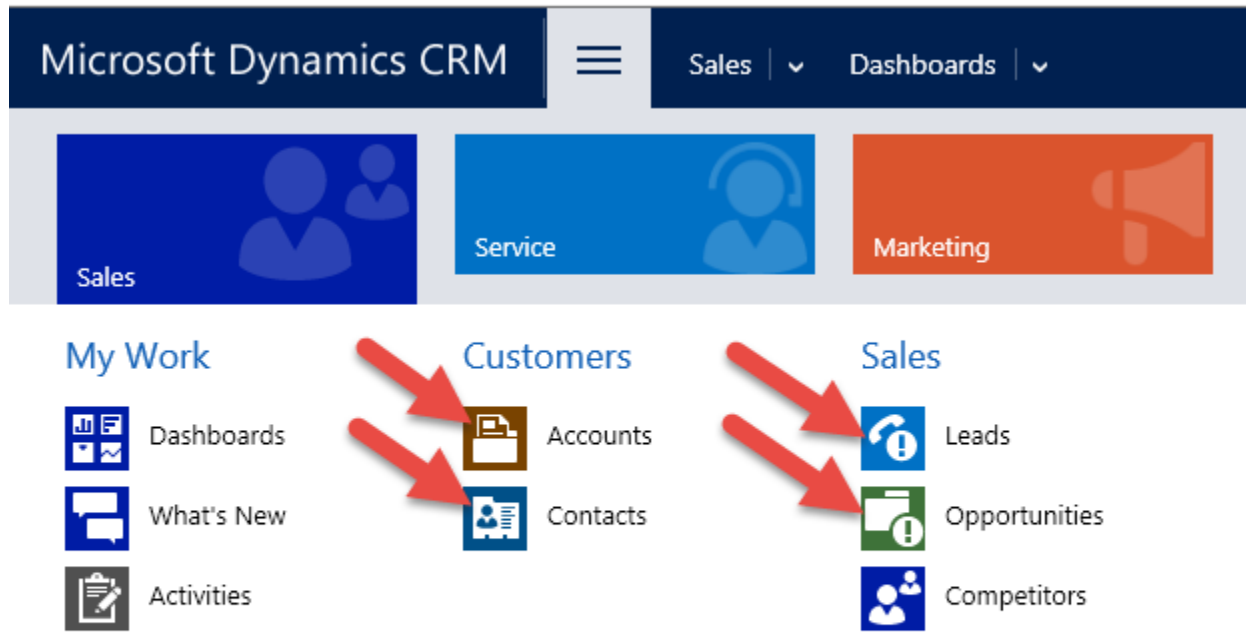
## Using Atrio Alert

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### 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 preceding entities. For this example we used **Accounts**.





2. Open a record from the previous entities and write your note in the Alert Note field. When you click out of the field the Alert is created.



Enable Server-Based SharePoint Integration

Enable Now

- + NEW
- DEACTIVATE
- CONNECT
- ADD TO MARKETING LIST
- ASSIGN
- EM



ACCOUNT

Fourth Coffee (sample)

### Summary

#### ACCOUNT INFORMATION

Account Name\* Fourth Coffee (sample)

Phone 555-0150

Fax --

Website <http://www.fourthcoffee.com/>

Parent Account --

Ticker Symbol --

#### Atrio Alert

Alert Note --

#### ADDRESS

5009 Orange Street  
Renton, TX 20175  
U.S.



After clicking out of the Alert Note field, the current date is also saved to the Alert Note Date field, and is then displayed in the alert bar before your Alert Note text.

Microsoft Dynamics CRM | Sales | Accounts

+ NEW DEACTIVATE CONNECT | ADD TO MARKETING LIST ASSI

ACCOUNT  
Fourth Coffee (sample)

9/16/2015- Company is over budget by \$12,00000

### Summary

**ACCOUNT INFORMATION**

Account Name *	Fourth Coffee (sample)
Phone	555-0150
Fax	--
Website	<a href="http://www.fourthcoffee.com/">http://www.fourthcoffee.com/</a>
Parent Account	--
Ticker Symbol	--

**Atrio Alert**

Alert Note	Company is over budget by \$12,00000
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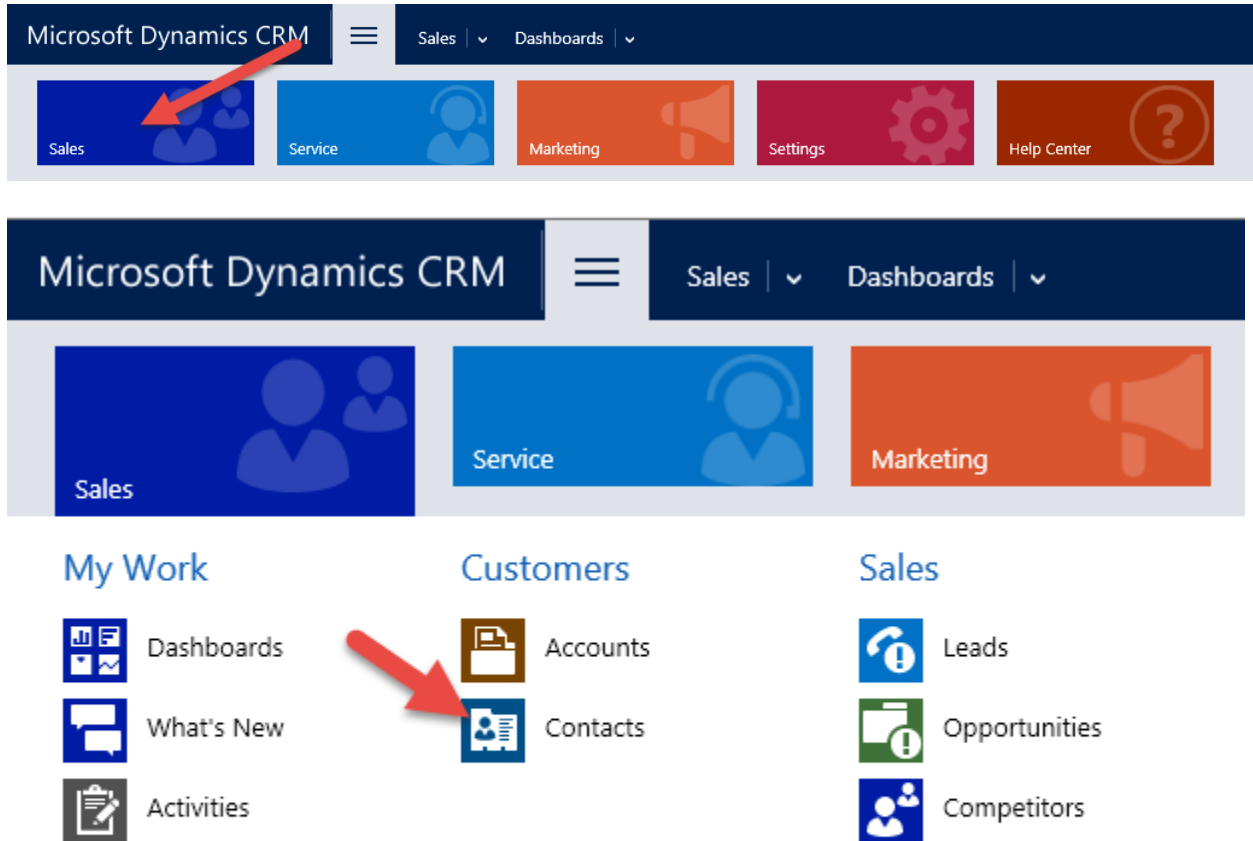
**ADDRESS**

5009 Orange Street  
Renton, TX 20175  
U.S.

### Copying Alerts from Company to Related Contacts

If a company record has an alert, the alert can be copied to any related contact from the contact entity.

1. Navigate to **Sales -> Contacts**



2. Select Contact you wish to copy alert to, from parent company. Then select **Run Workflow**.

Microsoft Dynamics CRM | Sales | Contacts

Enable Server-Based SharePoint Integration | Enable Now

NEW | EDIT | ACTIVATE | DEACTIVATE | DELETE | MERGE | DETECT DUPLICATES

My Active Contacts

Full Name ↑	Email	Company Name	Busi
Jim Glynn (sample)	someone_j@example.com	Coho Winery (sample)	555-
Maria Campbell (sample)	someone_d@example.com	Fabrikam, Inc. (sample)	555-
Nancy Anderson (sample)	someone_c@example.com	Adventure Works (sample)	555-
Patrick Sands (sample)	someone_k@example.com	Alpine Ski House (sample)	555-
Paul Cannon (sample)	someone_h@example.com	Alpine Ski House (sample)	555-
Rene Valdes (sample)	someone_i@example.com	A. Datum Corporation (sa...	555-
Robert Lyon (sample)	someone_g@example.com	Contoso Pharmaceuticals (...)	555-
Scott Konersmann (sample)	someone_f@example.com	City Power & Light (sample)	555-
Sidney Higa (sample)	someone_e@example.com	Blue Yonder Airlines (samp...	555-
Susan Burk (sample)	someone_l@example.com	A. Datum Corporation (sa...	555-
Susanna Stubberod (sample)	someone_b@example.com	Litware, Inc. (sample)	555-
Thomas Andersen (sample)	someone_m@example.com	Coho Winery (sample)	555-
Yvonne McKay (sample)	someone_a@example.com	Fourth Coffee (sample)	555-

- Send Direct Email
- Add to Marketing List
- Assign
- Share
- Email a Link
- Follow
- Unfollow
- Run Workflow
- Start Dialog
- Run Report
- Export to Excel
- Import Data
- Chart Pane
- Quick Campaign
- Relationship
- View
- New System View
- Customize Entity
- System Views

3. Select **Add Alert From Company to Contact** and click **Add** then **Ok**.



## Look Up Record ×

Enter your search criteria.

Look for  ▼  Show Only My Records

Look in  ▼

Search  🔍

	Process Name	Category	Created On	Mod	🔄
✓	Add Alert From Company to Contact	Workflow	7/24/2015 11:31...	7/27/2015	

1 - 1 of 1 (1 selected) Page 1

**Add**

## Confirm Application of Workflow ×

This workflow will be applied to 1 Contact.

You can monitor workflow jobs by opening each Contact and clicking Workflows.

**Are you sure that you want to continue?**

- After running the workflow the Alert Note field will be populated from the Account and the contact will show the same alert.



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Enable Now

+ NEW   DEACTIVATE   CONNECT |   ADD TO MARKETING LIST   ASSIGN  



ACCOUNT

Fourth Coffee (sample)

9/11/2015- Waiting on payment from company

## Summary

### ACCOUNT INFORMATION

Account Name *	Fourth Coffee (sample)
Phone	555-0150
Fax	--
Website	<a href="http://www.fourthcoffee.com/">http://www.fourthcoffee.com/</a>
Parent Account	--
Ticker Symbol	--

### Atrio Alert

Alert Note	Waiting on payment from company
------------	---------------------------------

### ADDRESS

5009 Orange Street  
Renton, TX 20175  
U.S.

Enable Server-Based SharePoint Integration Enable Now


+ NEW DEACTIVATE CONNECT | ADD TO MARKETING LIST ASSIGN

CONTACT  
Yvonne McKay (sample)

9/11/2015- Waiting on payment from company

### Summary

#### CONTACT INFORMATION

Full Name *	Yvonne McKay (sample)
Job Title	Purchasing Manager
Account Name	 Fourth Coffee (sample)
Email	someone_a@example.com
Business Phone	555-0100
Mobile Phone	--
Fax	--
Preferred Method of C	Any
Address	249 Alexander Pl. Redmond, WA 86372 U.S.

#### Atrio Alert

Alert Note      Waiting on payment from company

This workflow can be run from individual records as well. Open up the contact record and follow the same procedure of selecting the ellipses clicking on **Run Workflow** and then selecting the **Add Alert from Company to Contact**. Then click **Add**, and then **Ok**. Now wait approximately 30 seconds and refresh the Contact record. Upon refresh, the Alert Note field will be populated with the data from the company and the alert will be shown.

**Note:** If the contact has an alert already, it will be overwritten by the related Company alert.

## Support

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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

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