

# 365 Notify

## User Guide



365  
NOTIFY

# About 365 Notify

## How it works

365 Notify is a Dynamics 365 add-on which delivers notifications to users, contacts, accounts or any other records based on your business needs and activity in your Dynamics environment.

The notification functionality is browser-based, meaning installation is not required on any user devices, just a simple opt-in process to allow 365 Notify to deliver notifications.

The simple configuration of the add-on allows your recipients to:

### **Increase productivity**

Provides valuable, real-time notifications based on your business needs.

### **Stay connected 24/7**

Have notifications delivered to desktop or mobile, without having to open or refresh Dynamics.

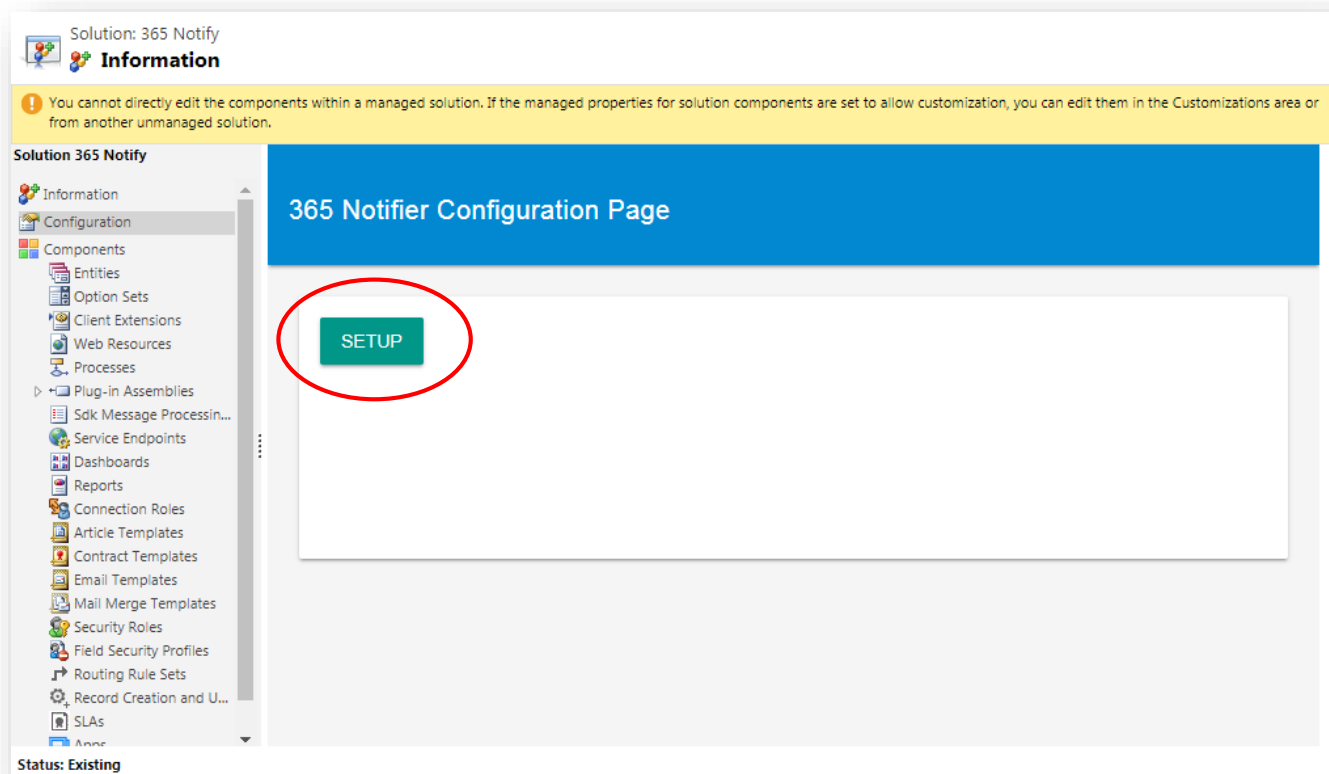
### **Foster engagement**

Presents quick & relevant information to users; increasing Dynamics usage and adoption.



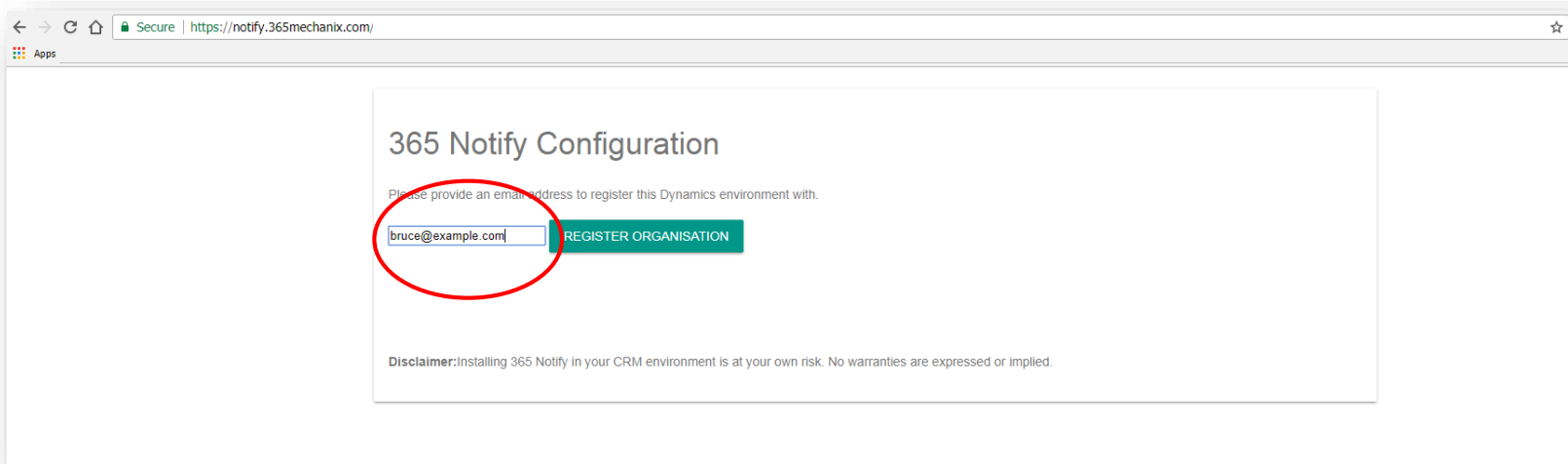
# How to register

To commence registration, open the 365 Notify Managed solution. Continue to the configuration page, and click on the 'setup' button.



# Registration continued

This will open up in a new window and will prompt you to provide the administrator email address to register 365 Notify.



The screenshot shows a web browser window with the address bar displaying "Secure | https://notify.365mechanix.com/". The page content is titled "365 Notify Configuration". Below the title, there is a prompt: "Please provide an email address to register this Dynamics environment with." A text input field contains the email address "bruce@example.com", which is circled in red. To the right of the input field is a green button labeled "REGISTER ORGANISATION". At the bottom of the form, there is a disclaimer: "Disclaimer: Installing 365 Notify in your CRM environment is at your own risk. No warranties are expressed or implied."


*Please note: Make sure that the browser is not InPrivate or InCognito mode. Upon submitting the registration request, a confirmation email will be sent to the email address provided.*



# Registration continued

Click on the 'Activate' button, which will confirm and validate your registration.

**Thank you for signing up!**  
You may activate your account now by clicking on the button below



or click [here](#)

We would like to invite you to try out the notification functionality and offer suggestions, queries, tips or ideas for the product. We want to ensure we are serving your needs as best we can.

The link will open a new page which will confirm your are successful registration, as displayed below.

**Success!**  
Congratulations, you have successfully registered your organisation to use 365 Notify. You may now invite users to subscribe to the service to begin receiving notifications. You have **50** notifications available to send.

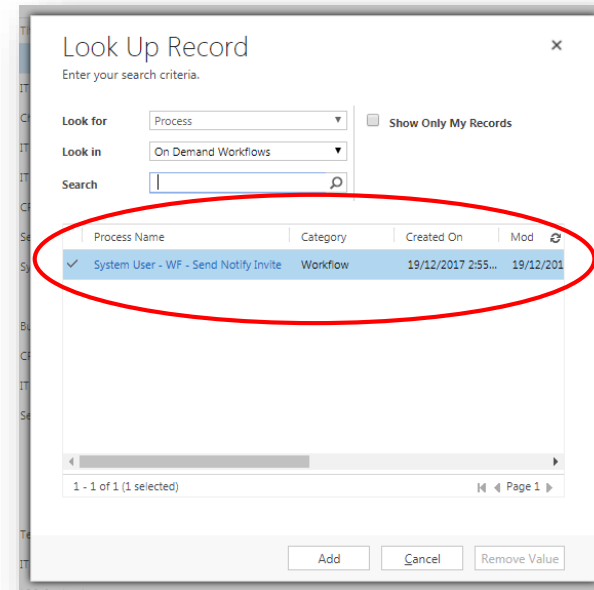
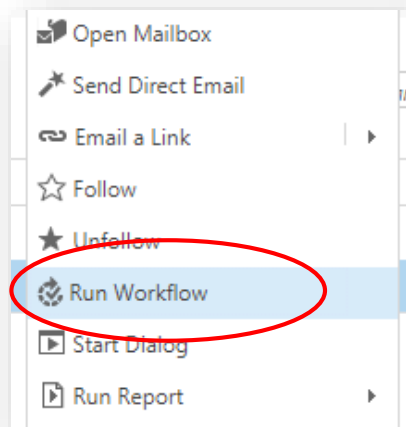


# Inviting recipients to 365 Notify

Now that you have completed the registration process, you may now proceed to invite users or other recipient types to subscribe to 365 Notify.

As part of the 365 Notify solution, 2 sample on-demand workflows are provided to show how you can send invitations to any record type. “System User - WF - Send Notify Invite” for example, is available to use to send invitations to system users.

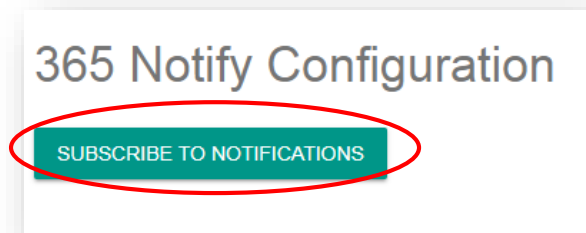
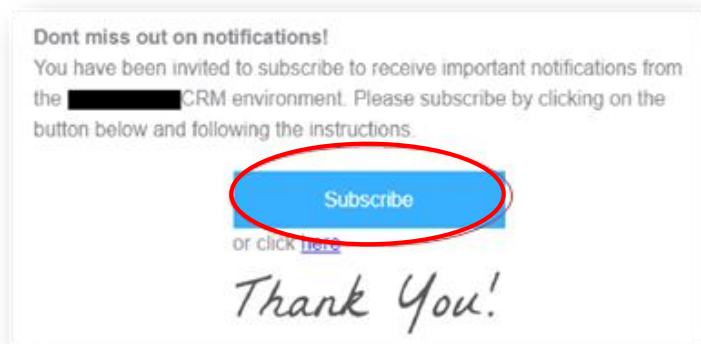
The workflow can be run against an individual user record or on a list of users. Simply click on the ‘Run Workflow’ button and select the workflow.



## Inviting recipients to 365 Notify continued

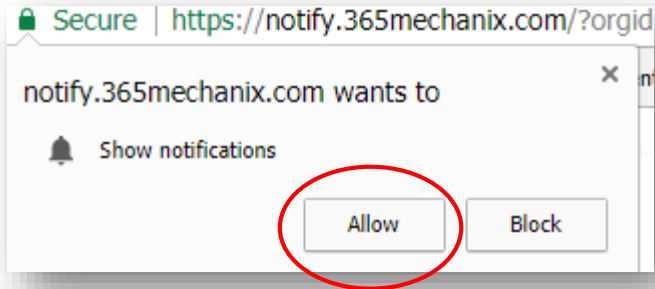
Invitation emails will be sent to the email address parameter you configure on the workflow. The 2 sample workflows provided send to the default email on the user and contact records respectively. The recipient will receive an email inviting them to subscribe to receive notifications from your organisation.

Clicking on the 'Subscribe' button will take them to the page where they can subscribe to the service by clicking on the 'Subscribe to Notifications'.

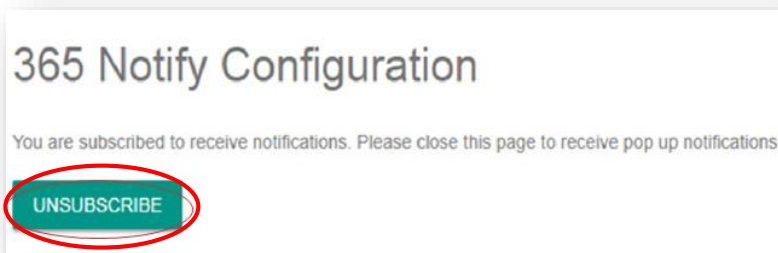


## Inviting recipients to 365 Notify continued

Clicking on the 'Subscribe to Notifications' button will request the recipients permission to allow notifications to be sent to their device from 365 Notify. Clicking on 'Allow' will proceed to subscribe the recipient to receive notifications and confirmation will be displayed on the page.



The recipient can 'Unsubscribe' at any stage by clicking on the displayed button. Note that you can only be subscribed to one device at a time. If you subscribe on another device, the newly subscribed device will receive the notifications whilst the previous one will not. If there are any issues with notification delivery, we always recommend unsubscribing and then subscribing again.





# Use case scenario

## Example

The scenario: Whenever a sale is made or an account put on hold, we want to notify multiple parties when this occurs. The steps that you take to set this up could be similar to the below.

1. Setup your workflow/custom rules for the scenario in which you want to send a notification.




The screenshot displays a configuration window for a workflow. It is divided into several sections:

- Hide Process Properties:**
  - Process Name: Account Credit Hold Changes
  - Activate As: Process
- Available to Run:**
  - Run this workflow in the background (recommended)
  - As an on-demand process
  - As a child process
- Workflow Job Retention:**
  - Automatically delete completed workflow jobs (to save disk space)
- Entity and Category:**
  - Entity: Account
  - Category: Workflow
- Options for Automatic Processes:**
  - Scope: Organization
  - Start when:
    - Record is created
    - Record status changes
    - Record is assigned
    - Record fields change
    - Record is deleted
- Rule Definition:**
  - Condition: If the account is put on credit hold,
  - Logic: If Account:Credit Hold equals [Yes], then:
    - Action: **Notify the account owner**
    - Details: 365Notifier (1.0.0.3):Send Notification [View properties](#)



## Use case scenario continued

2. Call the Send Notification workflow action and setup the notification details.

Property Name	Data Type	Required		Value
Recipient record URL (split mutiple targets with ';' )	Single Line of Text	Optional	<b>1</b>	{Record URL(Dynamic)(Created By (User))}; {Record URL(Dynamic)(Lead)}
Team (sent to each active member)	Lookup	Optional	<b>2</b>	 Customer Service
Marketing List (sent to each member)	Lookup	Optional	<b>3</b>	 Current Resellers
Auto dismiss notification	Two Options	Optional	<b>4</b>	<input checked="" type="radio"/> False <input type="radio"/> True
Subject	Single Line of Text	Required	<b>5</b>	 Customer approval - {Name(Lead)}
Message	Single Line of Text	Required	<b>6</b>	We have approved a customer to pick up equipment from your store today
Link to open when notification clicked	Single Line of Text	Optional	<b>7</b>	{Record URL(Dynamic)(Lead)}
Dynamics 365 App ID to open in	Single Line of Text	Optional	<b>8</b>	{D823C693-836B-E711-8103-C4346BC56078}
Custom notification icon url (https)	Single Line of Text	Optional	<b>9</b>	https://example.com/sale.png

*Details on the numbered configuration options are on the following page.*



## Use case scenario continued

1. This is where you specify the target recipient by populating the record URL for that record. You can specify multiple targets by adding a ';' between record URL values. In the example above, this notification will be sent to the contact record as well as the user who created the contact record.
2. Populating the team allows you to target multiple users in one go. Notifications will be sent to all active team members.
3. Both static & dynamic marketing lists can be used to target recipients to receive notifications. (If all the options in 1-3 are populated, 365 Notify will send notifications to all of the options)
4. The auto dismiss option, when set to 'True' means that the notification will dismiss itself from the recipients' screen after approximately 15 seconds.
5. This is the subject of the notification to be displayed. Dynamic values from CRM records can be used to populate it too.
6. The key message you want delivered to the recipient.
7. This is the link that will be opened when the recipient clicks on the notification. It could be an external link or to your Dynamics environment etc.
8. This option provides the capability to open a Dynamics record in the unified interface if you provide the app ID to open it in.
9. An optional setting to allow you to customize the icon shown in the notification. You could place your own company logo or perhaps have different icons that show depending on the nature of the notification (i.e. positive vs negative message).

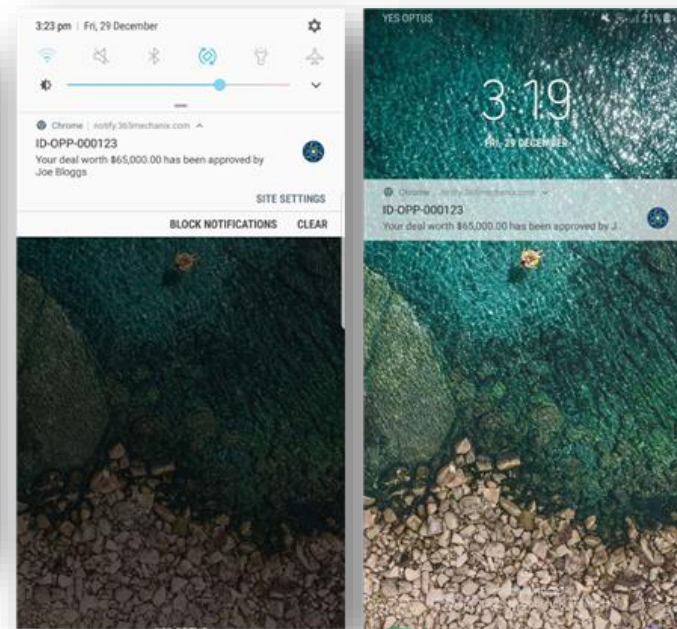


# Display examples

Desktop (notification on Windows 10 via Chrome)



Android



Please note: Web notifications are not supported by all browsers. [Click here](#) to see the list of supported browsers.



# Best practice

While it's relatively simple to get notifications up and running, making an experience that users really value is trickier.

To ensure your users are getting the most value from 365 Notify, be sure to consider the below:

Notifications should be **timely**, **precise**, and **relevant**.

## Timely

The notification should display at the right time. Use notifications primarily for time-sensitive events, especially if these synchronous events involve other people.

For example, a case that gets escalated in Dynamics, because the event is important and often involves other people.

## Precise

Offer enough information so that the user can make a decision without clicking through to the notification URL.

A notification should be:

- Short
- Have an informative title
- Be content specific
- Make the desired action the most prominent

Because users often give notifications only a quick glance, you can make their lives easier with a well-chosen title and description.

## Relevant

Make notifications relevant to the user's needs. If a user receives too many unimportant notifications, they might turn them all off.

So, be sure to keep it personal. Avoid notifications that are not directed specifically at the user..



To start receiving notifications today, click [here](#).

