



ProAlert365

User Guide

Date

August 2017

Version

1.0





Release Note

Version	Date	Author	Description
0.5	June 8th, 2017	Christian Drimonakos	Initial version
0.7	July 27th, 2017	Félix Carrier	Technical Revision
1.0	August 9th, 2017	Frédéric Lecavalier	Published version

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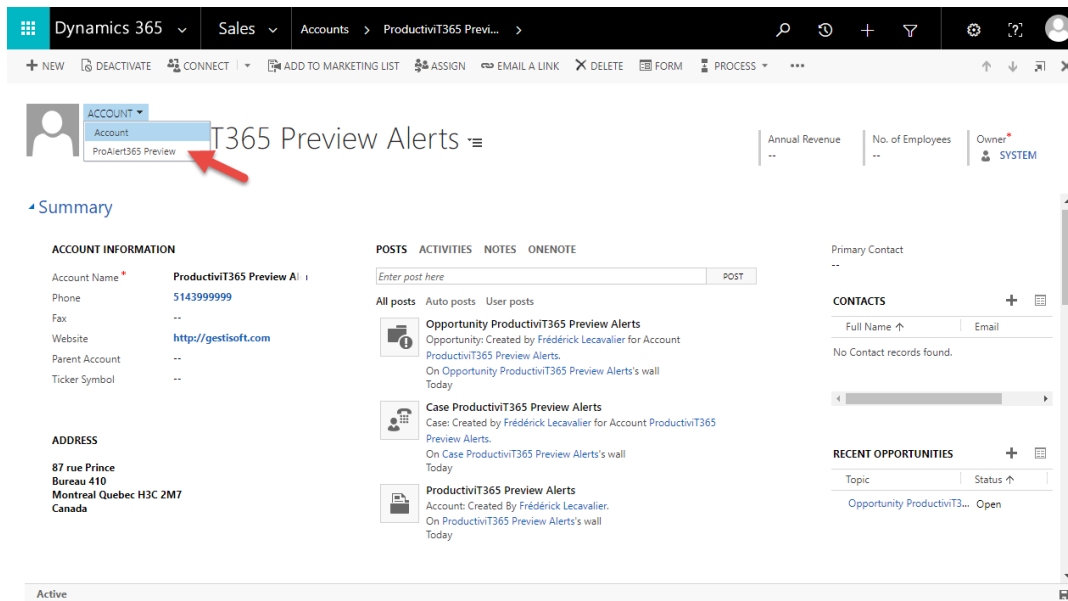
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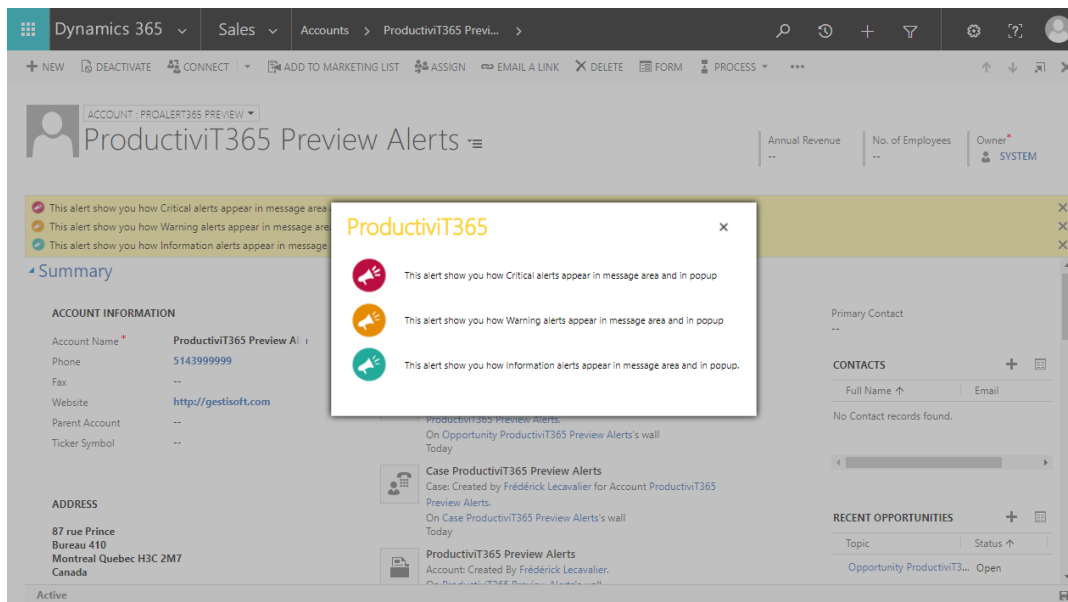
1 Testing the application

Once ProAlert365 is successfully installed from AppSource, you can start looking at alerts by using sample forms and sample data provided.

Search for “ProductivT365 Preview Alerts” Account. Open the record and change the active form to “ProAlert365 Preview”



Active alerts will be displayed.

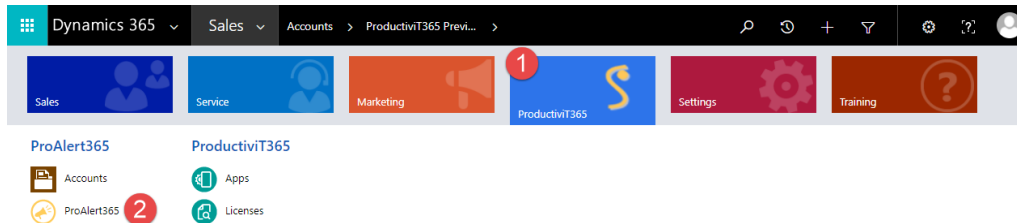




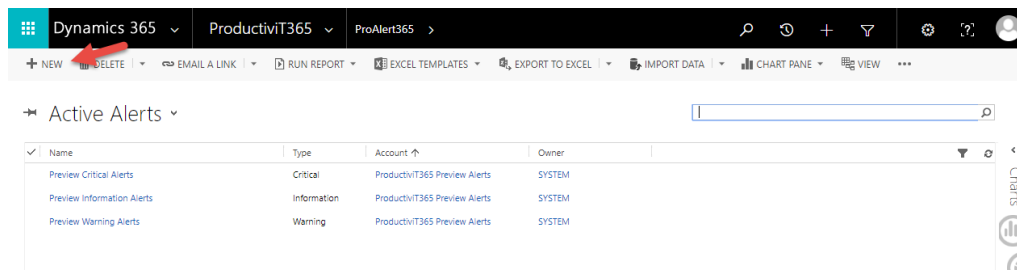
2 Create a new Alert

To view or create a new Alert:

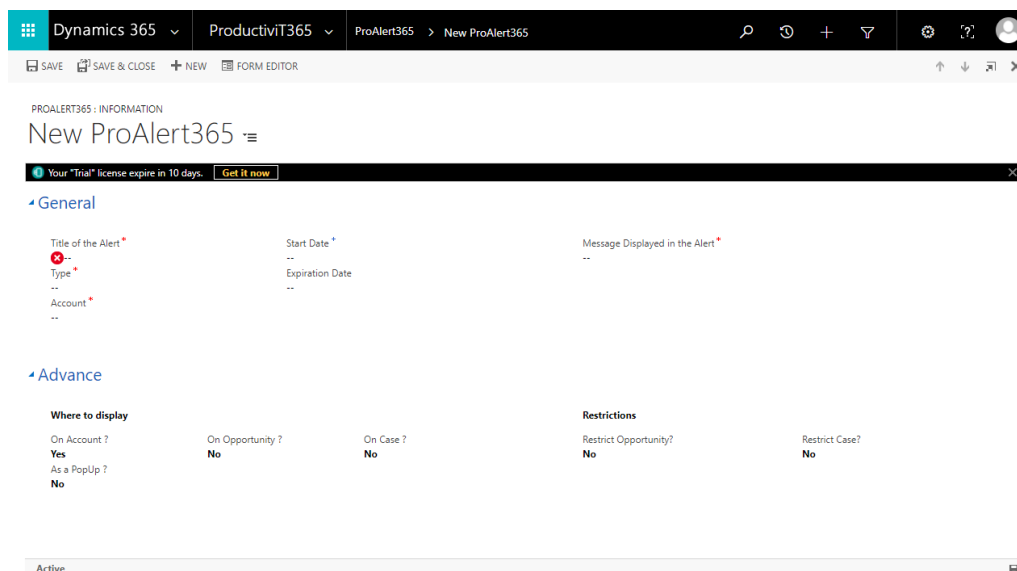
- 1- Navigate to ProductiviT365 area
- 2- Select ProAlert365.






A list of Active Alerts is displayed.



Click New to create a new Alert





Field	Description
1. Title of the Alert	The name of the Alert
2. Type	Alert Type Information  Warning  Critical  <i>The alert type simply changes the icon with which it is displayed and does not affect other behaviors.</i>
3. Account	Account that will have an alert displayed
4. Start Date	Date the alert will become active
5. Expiration Date	Date the alert will no longer be displayed
6. Message Displayed	Message to display if alert is active on Account / Contact / Case / Opportunity
7. On Account?	If checked, the alert will appear on the Account
8. On Opportunity?	If checked, the alert will appear on the Opportunity
9. On Case?	If checked the alert will appear on the Case
10. As a pop-up?	If checked the alert will appear as a pop-up
11. Restrict Opportunity	If checked, a new opportunity cannot be created linked to the account
12. Restrict Case?	If checked, a new incident cannot be created linked to the account



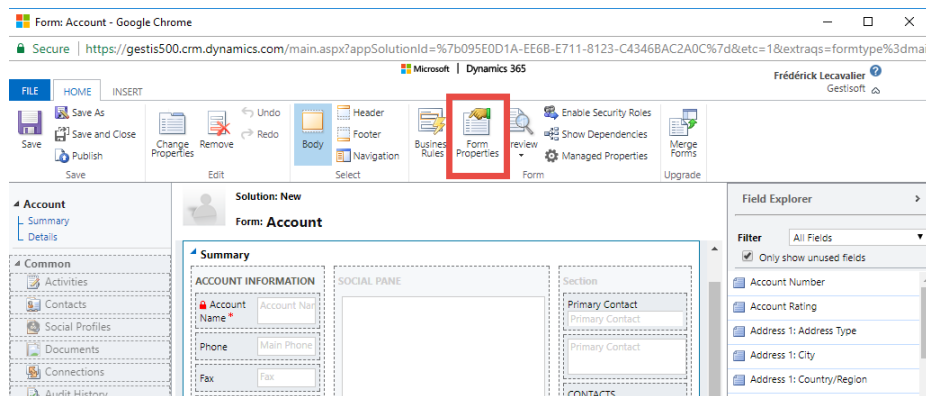
3 Configure the application

To view Alerts on your Account, Opportunity or Case, you will need to add a reference to a JavaScript to every form.

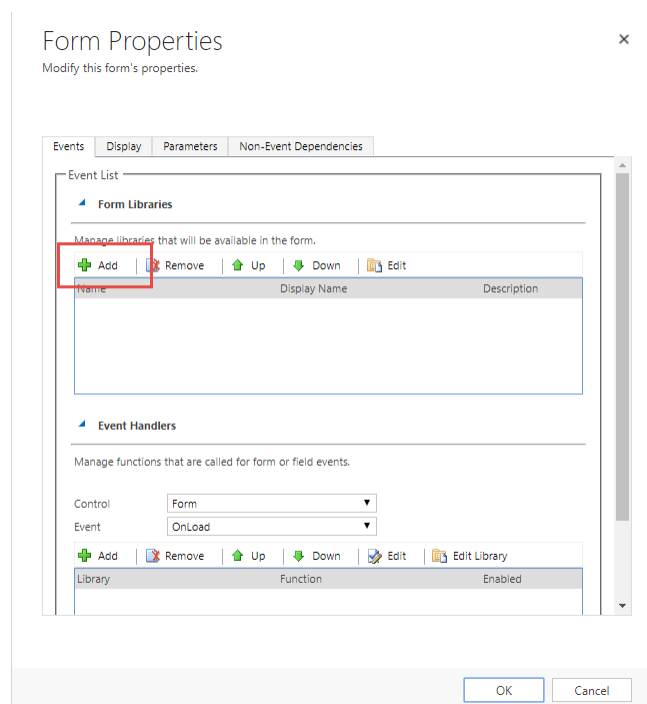
! Note

Form customization should be done by your System Administrator.

Open the Form Editor and click *Form Properties*

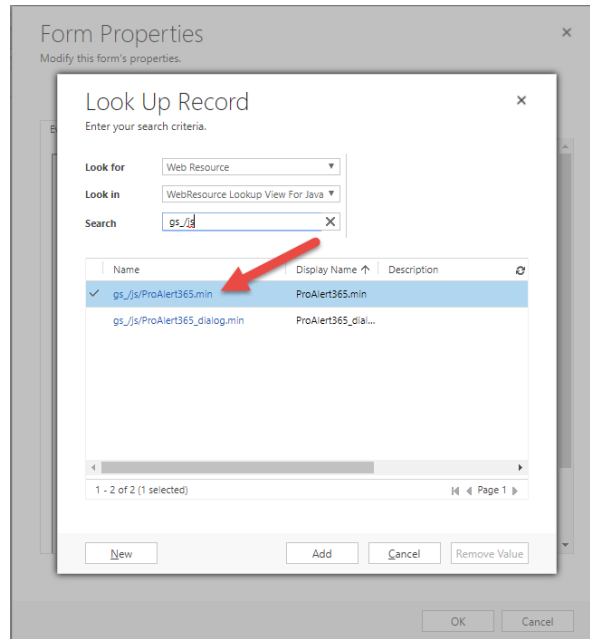


Click Add button

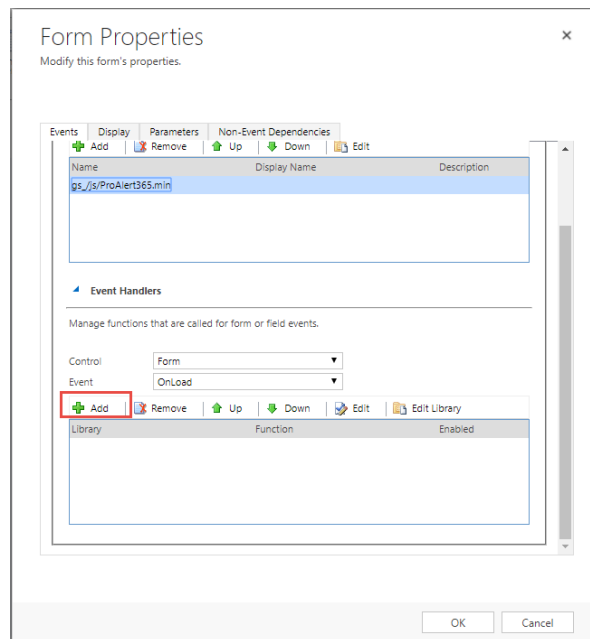




Search for “gs_/js/ProAlert365.min” and click **Add**.



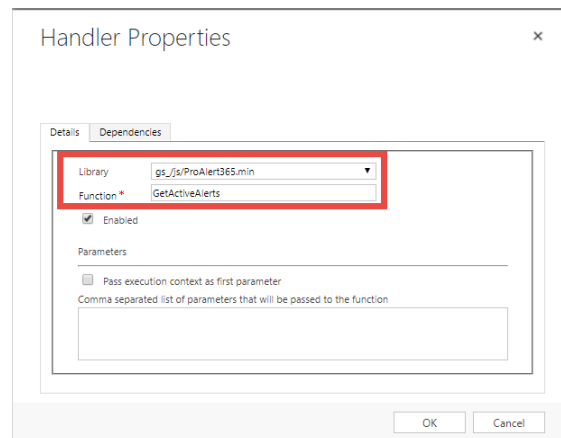
Add the Function on the *OnLoad* event by clicking on **Add**.





Set the library to “gs_/js/ProAlert365.min” and type the Function name.

Entity	Function Name
Account	getCurrentActiveAlerts
Opportunity	getCurrentActiveAlerts
Case	getCurrentActiveAlerts



Publish your customization.

4 Uninstalling ProAlert365

To uninstall the application, you will need to delete the following solutions.

