

Alerts

Alerts in Microsoft Dynamics AX

BENEFITS:

- **Provide a fast, easy way to set up alerts.** People can right-click within any Microsoft Dynamics AX record to define an alert rule for changes and events that they want to monitor.
- **Work more proactively by specifying which events to monitor.** Maintain tighter control over business activity by defining conditions for alert rules—for example, set up an alert rule to notify you one day before a shipment from a certain vendor is due.
- **Meet specific needs for your business.** Tailor alerts to your business priorities by creating templates for alert rules or modifying existing rules for individual users.
- **Provide flexible delivery options.** Help ensure people get the information they need—as pop-up windows, e-mail messages through Microsoft® Office Outlook®, or through Enterprise Portal for Microsoft Dynamics AX—all right from within Microsoft Dynamics AX.

Help drive workflow efficiency and empower people to keep a close, accurate eye on what's happening across your business with Alerts for Microsoft Dynamics™ AX. Rather than relying on random e-mail messages or other on-the-fly processes, people across your organization can quickly and easily create alert rules that deliver automatic notifications of changes and events critical to their job. For example, they can receive notification when a customer record has been created or deleted, a purchase order exceeds a certain number of days, or a job is marked as completed.

The screenshot shows the 'Create alert rule - Items' dialog box in Microsoft Dynamics AX. The dialog is open over a 'Purchase order' record for item 'B-R12, Battery R12'. The 'Alert me when' section is set to 'Stopped (Purchase order)' with the event 'is set to' set to 'Yes'. The 'Alert me for' section has 'All records in Items' selected. The 'Alert me until' section has 'No end date' selected. The 'Alert me with' section has the subject 'Item is stopped for purchasing' and a message field. The 'Also alert me by' section has 'Show pop-ups' checked and 'Send e-mail' set to 'nnn@nnnnnnnn.com'.

Specify alert conditions such as when the alert should occur and whether to monitor all records, only the record in focus, or a subset of records that match a selected filter.

FEATURES:

User-specific configuration

Users with administrative rights can create, modify, and delete alert rules for individual users and assign alert rules to other users.

Intuitive, easy rules setup

Right-click within any Microsoft Dynamics AX record to access a Create Alert Rule form tailored to that record. Or quickly set up a new rule based on shared templates.

Monitoring by specific dates

Set up alert rules bound to pre-defined dates, including the number of days before an event occurs, the specific date it occurs, or a specified date after the event occurs. For example, set up a rule to alert you to orders that have not been completed one day after the projected finish date.

Monitoring by system changes

Set up alert rules to notify you when values change—for example, when a record is created or deleted; a specific field* has changed; the field value increases or decreases; or there is an increase or decrease above or below a set value.

Conditions filtering

Add specific conditions to alert rules using an intuitive Inquiry Form so that alerts appear only when certain conditions are met. For example, an alert is sent when a purchase order is created for a particular vendor group.

Flexible delivery and access

Receive alerts through a dedicated View Alerts inbox, through pop-up windows in Microsoft Dynamics AX, or as e-mail messages in Outlook.

Fast access to Alerts details

Simply click the General tab on the View Alerts form to see critical information related to the alert, such as when the alert occurred, the reason for the alert, and the before and after values of a change. Then drill down to the form where the alert rule was set up—for example, a new customer record that triggered the alert.

Templates

Users with administrative rights can create rules templates based on specific business needs and define an HTML or Extensible Stylesheet Language Transformation (XSLT) template that merges alert data into an e-mail message.

Integration with Outlook

Receive e-mail alerts in Outlook. Click on the alert to directly access Microsoft Dynamics AX and drill down to business data relevant to the alert, alert details, or the alert rule itself.

Remote access capabilities

People in your organization with appropriate rights can access their alerts from any location using the Enterprise Portal.

For more information about Alerts for Microsoft Dynamics AX, visit www.microsoft.com/dynamics/ax.

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