

# Best of the Alerts in D365FO



Miha Vuk  
D365FO Software Architect

*DO* **C**ENTRIC

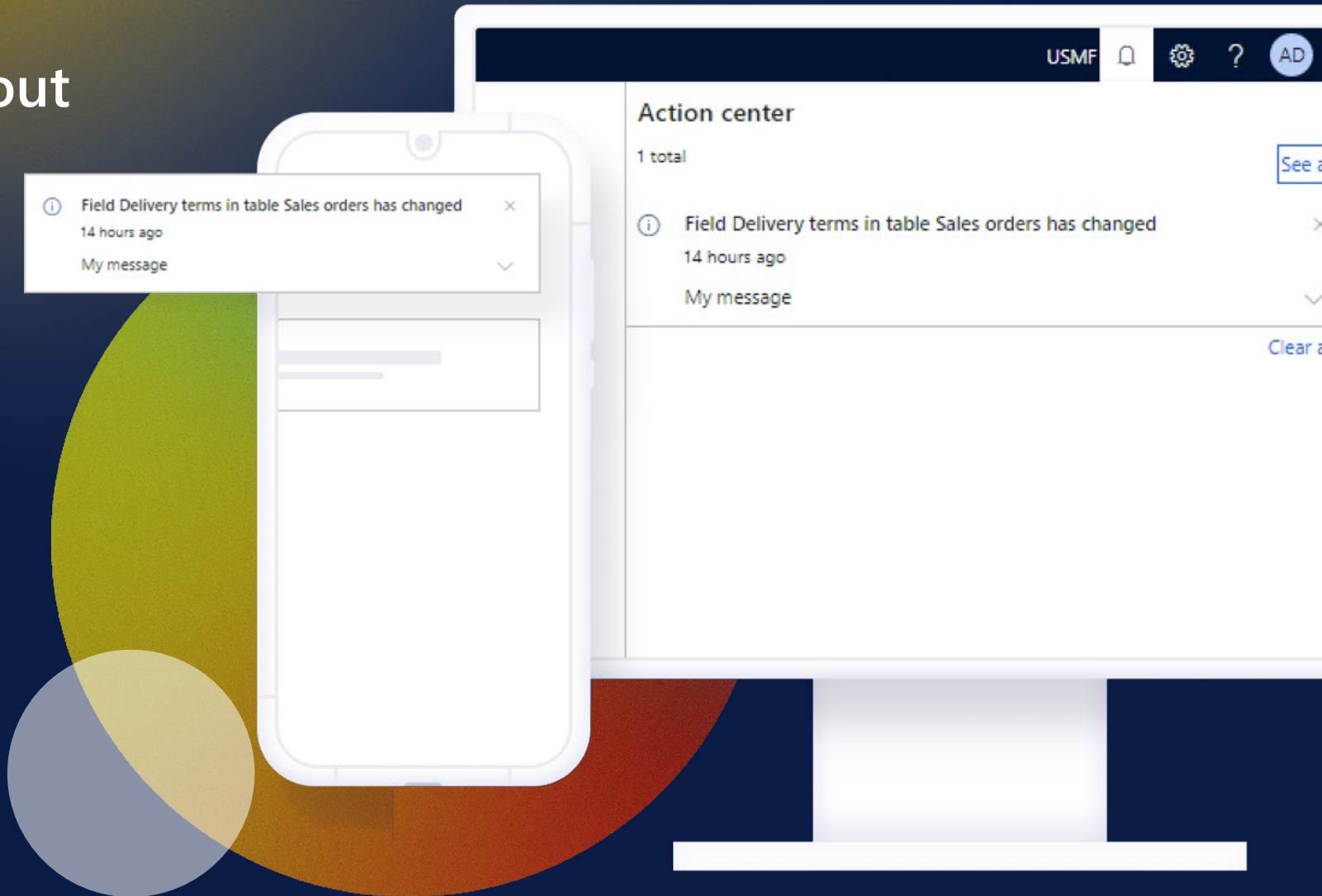
# HOW ALERTS CAN HELP YOU

They can inform you about

- Data changes
- Events near/past due

They can notify

- You
- Your colleagues
- External partners
- Other applications





## D365FO ALERTS

### Standard

- Change based alerts
- Due date alerts
- Works on form main data source
- Subgrids (lines) are not supported (except with the SysTableBrowser trick)
- Applies the form's filter query
- Basic email notifications
- Business events
- High volume notification rules

### Custom

- Simpler alerts for a specific field
- Show/edit query and other alert rule fields
- Subgrids (lines) supported
- View in grid
- Copy alert rules
- Rich dynamic email templates
- Placeholders for dynamic content
- Notify additional users
- Alerts summary email

# CHANGE BASED ALERTS



< Delete Options

Action center notifications

Standard view

Filter

	Title	Message	Rule ID	Notification state	Notification type	Created date and time	Expiration
<input type="radio"/>	Record has been created i...	A new sales order has been created.	000617	Active	Alert	10/8/2024 2:42:56 PM	11/7/2024 1:42:56 PM
<input type="radio"/>	Record has been created i...	New sales order for customer US-001.	000620	Active	Alert	10/8/2024 2:42:57 PM	11/7/2024 1:42:57 PM
<input type="radio"/>	Record has been created i...	A new sales order has been created.	000617	Active	Alert	10/8/2024 2:42:58 PM	11/7/2024 1:42:58 PM

## Action center

3 total

See all

- Record has been created in Sales orders

a few seconds ago

A new sales order has been created.

STATUS

Active

View Sales order: 000961, Contoso Retail Los Angeles
- Record has been created in Sales orders

a few seconds ago

New sales order for customer US-001.

STATUS

Active

View Sales order: 000960, Contoso Retail San Diego
- Record has been created in Sales orders

a few seconds ago

A new sales order has been created.

STATUS

Active

View Sales order: 000960, Contoso Retail San Diego

Clear all

000669	US-001	US-001	Contoso Retail San Diego	Sales order	invoiced	USD
000698	US-001	US-001	Contoso Retail San Diego	Sales order	Open order	USD
000729	US-001	US-001	Contoso Retail San Diego	Sales order	Open order	USD
000754	US-001	US-001	Contoso Retail San Diego	Sales order	Delivered	USD
000768	US-001	US-001	Contoso Retail San Diego	Returned order	Open order	USD
<input type="radio"/> 000783	US-001	US-001	Contoso Retail San Diego	Sales order	Open order	USD

Message

New sales order for customer US-001.

User group ID

OK

Cancel



# CHANGE BASED ALERTS

## Alert me when

Table name

Sales orders

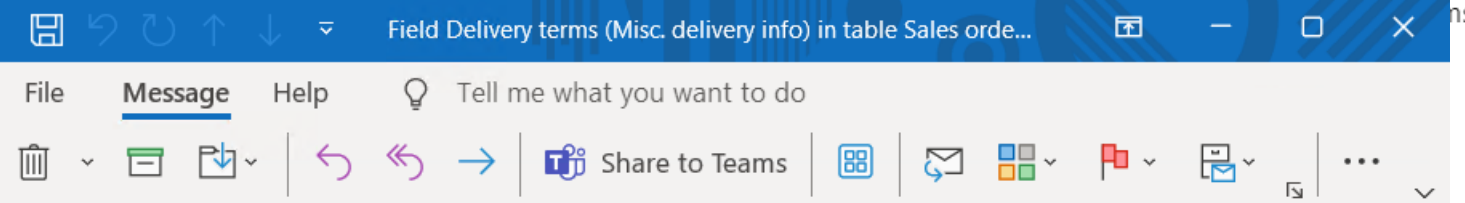
Event

Record has been created

Automatic notification and cancellation

☐ No

Form information



Field Delivery terms (Misc. delivery info) in table Sales orders has changed



miha.vuk@docentric.com

To miha.vuk@docentric.com



3:07 PM



Microsoft Dynamics 365

### Message:

Delivery terms changed for delivered order.

### Details:

[View Sales order: 000713, Whale Wholesales](#)

## Create alert rule

Create alert rule - Sales orders

[Alert rule condition](#)

Rule ID

000625

Is conditional

☒ Yes

Table name

Sales orders

Condition criteria

Sales orders.Status: Delivered

## Alert me when

Table name

Sales orders

Event

has changed

Field

Delivery terms (Misc. delive...

Alert me for

Alert me until

Alert me with

Subject

Field Delivery terms (Misc. de...

User ID

Admin

Message

Delivery terms changed for delivered order.

User group ID

Send email

☒ Yes

Email recipients

miha.vuk@docentric.com

# DUE DATE ALERTS

Email message Options

My view

## Organization email templates

Email ID	Email description	Sender name	Sender email
Alert	Alert	D365FO Alerts	alerts@docentric.com

General

Default language code: en-us Priority: Normal Batch group:

Docentric settings

Use Docentric email editor: Yes Class for placeholders: DocEmailTemplateAdvance... WORKFLOWS: Workflow emails: No ALERTS: Alert emails: Yes EMAIL ATTACHMENTS: Add email attachments: Yes Attachment tags: alert

Email message content

+ New Delete Edit Send test email

	Language	Subject	Has body
	en-us	Alert	<input checked="" type="checkbox"/>

## Edit email template

Normal B I

New alert notification

Hi %WORKER%,

You have a new alert for:

Related record	%For%
Company	%Company%
Details	%Subject%
Action to take	%Message%
Modified date	%Occurred%
Environment	%ENVDOMAINNAME%

Best regards,

Your's D365FO

## Alert me when

Table name: Sales orders Event: is due in Field: Requested ship date 2 (Deli... 1 calendar day

## Alert me for

## Alert me until

## Alert me with

Subject: Field Requested ship date 2 (...

User ID: Admin User group ID: SalesTeam

Message: Sales order should be shipped tomorrow.

Send email: Yes

Email recipients: %USER\_Admin%

Docentric email settings

Send email using Docentric: Yes

Email ID: Alert

Send email using: Synchronous

Cc: m; %USERGROUP\_SalesTeam% sales.demo@docentric.com; %USERGROUP\_SalesTeam% Bcc:



Filter

Show rules

My rules

000617

Record has been created in Sales orders

000620

Record has been created in Sales orders

000627

Field Delivery terms (Misc. delivery info...

000631

Field Requested ship date 2 (Delivery date...

000961 : Contoso Retail Los Angeles | Standard view

Manage my alerts

General

Rule ID

000631

Organization-wide

No

Form name

Sales order details

Enabled

Yes

Is conditional

No

Condition criteria

Alert rule details

ALERT ME WHEN

Table

Sales orders

ALERT ME FOR

All records in Sales orders

Current record in Sales orders

ALERT ME WITH

Subject

Field Requested ship date 2 (...)

Message

Send email

Yes

Email recipients

ALERT SUMMARY EMAILS

Include in summary emails

No

Summary email recipients

Notification list | 000631 : Field Requested ship date 2 (Delivery date) in t...

Standard view

OverviewGeneral

<input type="radio"/> U	<input type="radio"/> N	Subject	Due date	Notified for	Company	Notification occurred	Source	Email message
<input checked="" type="radio"/>	<input type="checkbox"/>	⌚ Field Requested ship date 2 (Delivery date) in table Sales orders is due in 1 cale...		View Sales order: 000961, Contoso Retail Los Angeles	usmf	10/8/2024 3:39:47 PM	Alerts	
		⌚ Field Requested ship date 2 (Delivery date) in table Sales orders is due in 1 cale...		View Sales order: 000961, Contoso Retail Los Angeles	usmf	10/8/2024 3:39:47 PM	Alerts	
		⌚ Field Requested ship date 2 (Delivery date) in table Sales orders is due in 1 cale...		View Sales order: 000961, Contoso Retail Los Angeles	usmf	10/8/2024 3:39:47 PM	Alerts	✓

Notification list | 000627 : Field Delivery terms (Misc. delivery info) in ta...

Standard view

OverviewGeneral

NOTIFICATION OCCURRED

Alert created date and time

10/8/2024 03:06:51 PM

NOTIFIED WITH

Subject

Field Delivery terms (Misc. de...

Message

Delivery terms changed for delivered order.

Source

Alerts

Due date

ALSO NOTIFIED BY

Email

Yes

miha.vuk@docentric.com

NOTIFIED FOR

Notified for

View Sales order: 000713, Wh...

Company

Contoso Entertainme...

NOTIFIED WHEN

Field

Delivery terms (Misc....

Event

has changed

Previous value

Set to value

EXW

Sales orders

FOB

SalesTable

2022

2022

137

32015

usmf

Menu item name

SalesTableDetails

Primary table name

SalesTable

Alert table name

SalesTable

Alert field name

ShippingDateRequested

Event type class name

EventTypeDueln

Created by

Admin



# ALERT SUMMARY EMAILS

Send email

Email recipients

Send email

Alert summary

DA

D365FO Alerts <alerts@docentric.com>  
To: miha.vuk@docentric.com

Reply

Reply All

Forward

Tue 10/8/2024 4:10 PM

Alert summary

DA

D365FO Alerts <alerts@docentric.com>  
To: alicia.test@docentric.com

Reply

Reply All

Forward

Tue 10/8/2024 4:10 PM

## Alert Summary

Alert ID	Related record	Subject	Message	Details	Company	Created by
<a href="#">5637144794</a>	<a href="#">View Purchase order: 00000177, Ade Supply Company</a>	<a href="#">Record has been created in Purchase orders</a>	A new purchase order has been created.		usmf	Admin 10/8/2024 7:08 AM
<a href="#">5637144799</a>	<a href="#">View Sales order: 000962, Contoso Retail San Diego</a>	<a href="#">Record has been created in Sales orders</a>	New sales order for customer US-001.		usmf	Admin 10/8/2024 7:09 AM
<a href="#">5637144795</a>	<a href="#">View Sales order: 000962, Contoso Retail San Diego</a>	<a href="#">Field Requested ship date 2 (Delivery date) in table Sales orders is due in 1 calendar day</a>	Sales order should be shipped tomorrow.		usmf	Admin 10/8/2024 7:09 AM

MS D365FO Alert Summary Powered by Docentric

Alert ID	Related record	Subject	Message	Details	Company	Created by
<a href="#">5637144795</a>	<a href="#">View Sales order: 000962, Contoso Retail San Diego</a>	<a href="#">Field Requested ship date 2 (Delivery date) in table Sales orders is due in 1 calendar day</a>	Sales order should be shipped tomorrow.		usmf	Admin 10/8/2024 7:09 AM

MS D365FO Alert Summary Powered by Docentric

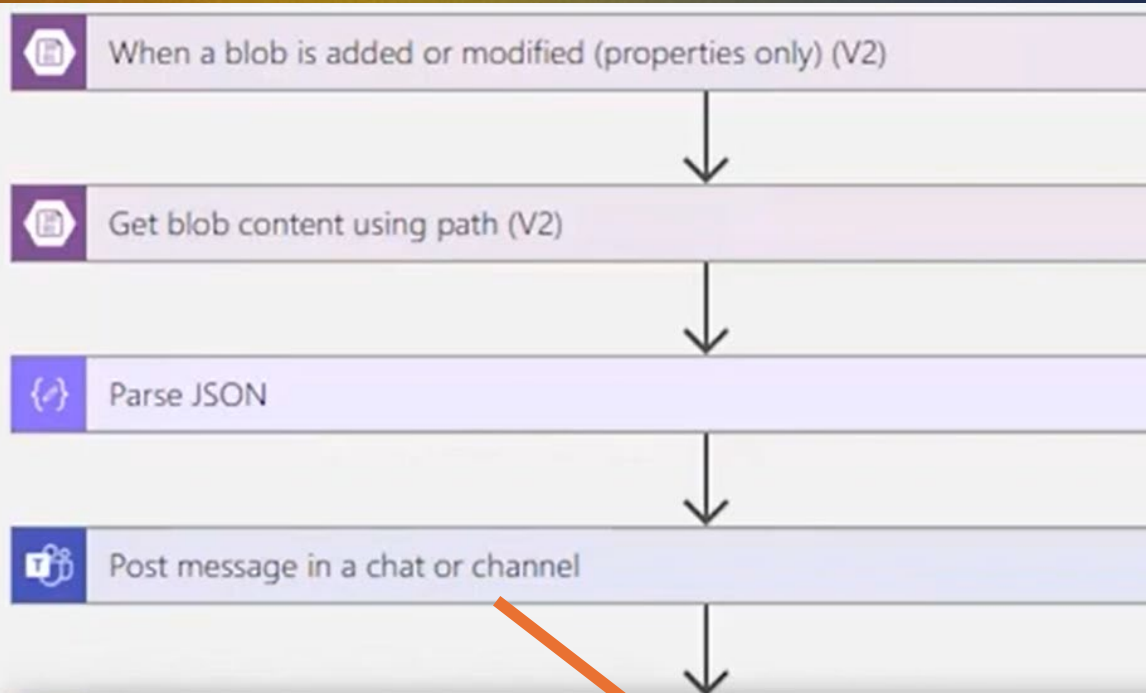
INBOX

Rule ID

Alert created date and time

(greaterThanUtcDate...

```
{
  "BusinessEventId": "BusinessEvent",
  "BusinessEventLegalEntity": "usmf",
  "ContextRecordSubject": "",
  "ControlNumber": -922337203685477,
  "DataAreaId": "usmf",
  "Email": "",
  "EventId": "39D3BB1F-A563-4EC0-B8",
  "EventTime": "/Date(1725963590000",
  "EventTimeIso8601": "2024-09-10T1",
  "FieldId": 0,
  "FieldLabel": "<All fields>",
  "FieldName": "",
  "InitiatingUserAADObjectId": "{31",
  "KeyValue1": "00000128",
  "KeyValue2": "Ade Supply Company",
  "Link": "https://usnconeboxax1aos",
  "cmp=usmf&mi=display:PurchTableListP",
  "0dk9aT%2b%2fSuxA4sHDhbz4xjfQWwbXCVg",
  "IyL8RtLdhtUKe0XvLSsgFYl4dkL3tZRf1fC",
  "uteQsiswsNBo99cC1mDcAQwiGDBL8T2M7AJ",
  "F10qVom2G5XgA05NteBp47eaVdL",
  "MajorVersion": 0,
  "Message": "",
  "MessageDetails": "View Purchase",
  "MinorVersion": 0,
  "ParentContextRecordSubjects": [
  ],
  "ParentTableId": 9669,
  "RuleId": "000393",
  "Subject": "Record has been creat",
  "TableId": 9669,
  "TableLabel": "Purchase orders",
  "TableName": "PurchTable",
  "TypeTrigger": "RecordInsert",
  "UserId": "Admin"
}
```



Search connectors and actions

For You All Built-in Standard

Recent

- Azure Blob Storage
- Microsoft Teams
- Business Central

Configure new endpoint

Business events Errors Security

Endpoint type

- Azure Service Bus Queue
- Azure Service Bus Queue
- Azure Service Bus Topic
- Azure Event Grid
- Azure Event Hub
- HTTPS
- Azure Blob Storage

Miha Vuk via Power Automate 4:28 PM

Record has been created in Sales orders by Admin

[View Sales order: 000964. Contoso Retail Los Angeles](#)

Company: usmf

See more

Reply

<https://usnconeboxax1aos.cloud.onebox.dynamics.com/?cmp=usmf&mi=display:salestabledetails&q=bgsaahn413jt6ik%2be%2fxwibqwsq%2brfwx0ehcvze0yaapdqiderjgomxk67rx%2bndmtyq9fcdwwwu3mie7wwwmfz3rpdapowqdx0aocwifna1vloqpfm6oounp44zxpckzdxoav%2b0jzixqbfsrdgofpbjypj8rq76qwhrd2frftfvcgplas5ewdcqz80tdnlsjws%2f2ug%2ft2tw7rd0us19ahwybvakaz4b2al5iuls%2f8e2b4vny%2f1g2k1kmm5gppgogrnmnic1xlpnizdr%2bermt%2fstdstootsx6eldrmi66%2f>

New conversation

# BATCH JOB ALERTS - STANDARD

← ≡ Edit +New Delete Batch job history Recurrence **Alerts** BusinessEvents Generated files Change status Remove recurrence Copy batch job Options

**Personalize**  
Always open for editing  
Personalize this page  
Add to workspace

**Page options**  
Security diagnostics  
Advanced filter or sort  
Record info  
Go to

**Share**  
Get a link  
Create a custom alert  
Manage my alerts

Batch job | Standard view

## 22565515699 : E-mail distributor batch

Standard view

### Batch job alerts

Ended  
☒ Yes

Error  
☒ Yes

Canceled  
☒ Yes

**OTHER ALERTS**  
Show pop-ups  
☒ Yes

**Email**  
☒ Yes  
miha.vuk@docentric...

### User options

Visual

Preferences

**Account**

Workflow

### Set up account information

**Account**

User ID  
Admin

**Email provider selection**

Email provider ID

The batch job Email distributor batch completed successfully.

File Message Help Tell me what you want to do

Delete Respond Share to Teams All Apps Quick Steps Move Tags Editing Immersive

The batch job Email distributor batch completed successfully.

Miha Vuk  
To Miha Vuk

Reply



# BATCH JOB ALERTS - IMPROVED

## Alerts on the Batch job history table

The screenshot displays the Dynamics 365 Batch Job History table for 'Order confirmation : Ended'. The table has columns for Batch job ID, Status, Job description, and Actual start date. Two rows are visible, both with status 'Ended'.

Batch job ID	Status	Job description	Actual start date
68720136542	Ended	Order confirmation	3/4/2024
68720136542	Ended	Order confirmation	3/5/2024

An Excel spreadsheet is overlaid on the right, showing the 'Export log' content. The log details the batch job execution steps, including task creation, document processing, and task completion.

**BatchJob Order confirmation (68720136542) 3-4-2024 09-19-11 pm (1).xlsx**

**Infolog for job Order confirmation (68720934017)**

Line	Message
1	Infolog for job Order confirmation (68720934017)
2	Infolog for task Order confirmation (68720702059)
3	Info PostingBatch tasks created for multithreading.
4	Infolog for task End multithread posting (68720702060)
5	Info Document processingConfirmation (000783-24)Report (Show confirmation) with ID (SalesConfirm.F
6	Info Document processingConfirmation (000783-24)Report (Show confirmation) with ID (SalesConfirm.F
7	Info SSRS Report Design AOT Name: SalesConfirm.Report   Template ID: @DOCENTRIC_DEFAULT_TEMPL
8	Info Update completed
9	Infolog for task Multithread posting (68720702061)
10	Info PostingOrder ID: 000783
11	Info PostingBatch task ended.
12	End of task log



## D365FO ALERTS

### Standard

- Change based & Due date alerts
- Filter records
- SysTableBrowser trick for lines
- Action center, Notification list, emails
- Business events for integrations
- Use database log for details

### Custom

- Simpler alert rule creation, better overview, copy rules, edit query
- Subgrids (lines) supported
- Rich dynamic email templates
- Notify additional users
- Alerts summary email
- Improved batch job alerts
- Use Docentric Free Edition or ask me for improvements code



## GET IN TOUCH

Please reach out with more questions and to chat!



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