

# Zap Objects: Zap Notifications/ Alerts



Generate Notifications in-bulk:  
onDemand OR based on Trigger OR based  
on Recurring Pattern! (In-App + Push +  
Email + Form Notifications)

Works with: Dynamics 365 Sales,  
Customer Service, Field Service &  
Power Apps.



# Features

- Generate Bell, Push , Email Notifications in bulk (for multiple Users/Teams)
- Generate Form Notifications (displayed inline in form or as pop-up)
- Generate Notifications using Power Automate/ Workflow
- Generate Notifications based on onDemand, triggers or based on recurring pattern
- No need to worry about creating complicated JSON data for generating Notification
- Token Generator Helper provided for using merge fields within the Notification Text
- Allow Users to set personal preferences for which notifications to be shown
- Detailed event logging for easy trouble-shooting of any issue

# Zap Notifications Generator – Terminology - Different Notification Types

**1. In-App (Bell Notifications)**  
(Displayed next to Bell in form header)

**2. Push Notifications**  
(Displayed in Mobile)

**3. Email Notifications**

**4. Form Notifications**  
(Displayed inline in form or in Pop-Up)

**General (One-Time Announcement)**

**Trigger**  
(Case/Lead is assigned)

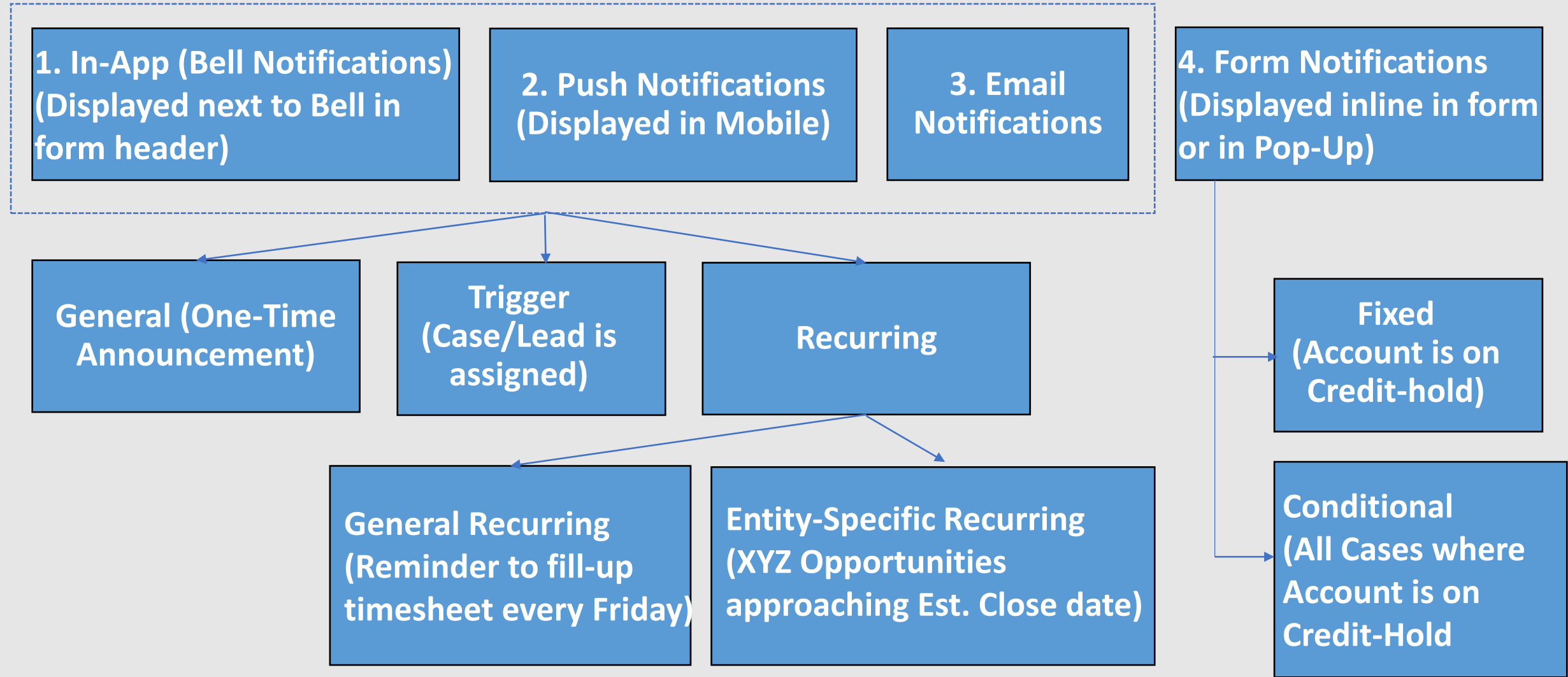
**Recurring**

**General Recurring**  
(Reminder to fill-up timesheet every Friday)

**Entity-Specific Recurring**  
(XYZ Opportunities approaching Est. Close date)

**Fixed**  
(Account is on Credit-hold)

**Conditional**  
(All Cases where Account is on Credit-Hold)



# Generate Bell Notifications in Bulk using Zap Objects – Sample Notifications

**Dynamics 365 | Zap Notifications**

Search

8 minutes ago

**Case Assigned**

Dear Sumeet, Case has been assigned to you!  
Below are the Case details:  
Case Title: Zap Copy Record - Error Message  
Case Number: ZAP-18653315  
Case Customer: [Syntratec](#)  
Priority:  
Created On: 9/21/2021 4:32 PM

[Open record](#)

**Trigger Notification**

Users To Include Users To Exclude Teams To Include Related

2 days ago

**Opportunity Nearing Close Date Rem...**

Dear Sumeet, Your Opportunity is nearing Close date! Below are the details:  
Topic:: Walmart | Zap Helpdesk App  
Account: Walmart  
Contact: Dan Cary  
Est. Revenue: \$4,300.00  
Est. Close Date: 9/27/2021

[Open Record](#)

**Recurring Notification**

20 minutes ago

**Case Assigned**

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[Open record](#)

2 days ago

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Account: Walmart  
Contact: Dan Cary  
Est. Revenue: \$4,300.00  
Est. Close Date: 9/27/2021

[Open Record](#)

2 days ago

**Scheduled Network Downtime**

Hi Sumeet, Please be advised that the network will be unavailable from 01:00am to 05:30am on Oct 24, 2021. This period of downtime will be scheduled for necessary updates to be applied to the network servers.

[Go to your Time-Sheet](#)

3 days ago

**Time-Sheet Submission Reminder**

Hello Sumeet, Please don't forget to submit your time-sheet before the end of business hours today!

[Go to your Time-Sheet](#)

**Recurring Notification**

Create Thunder Notification ☐

In-App

2 days ago

**Scheduled Network Downtime**

Hi Sumeet, Please be advised that the network will be unavailable from 01:00am to 05:30am on Oct 24, 2021. This period of downtime will be scheduled for necessary updates to be applied to the network servers.

Expiry Time 30

Notification Preference - Category (Optional)

Category [Helpdesk](#)

Sub-category [Case Assignment](#)

**Notifications**

Dismiss all

20 minutes ago

**Case Assigned**

Dear Sumeet, Case has been assigned to you!  
Below are the Case details:  
Case Title: Zap Copy Record - Error Message  
Case Number: ZAP-18653315  
Case Customer: [Syntratec](#)  
Priority:  
Created On: 9/21/2021 4:32 PM

[Open record](#)

2 days ago

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Topic:: Walmart | Zap Helpdesk App  
Account: Walmart  
Contact: Dan Cary  
Est. Revenue: \$4,300.00  
Est. Close Date: 9/27/2021

[Open Record](#)

2 days ago

**Scheduled Network Downtime**

Hi Sumeet, Please be advised that the network will be unavailable from 01:00am to 05:30am on Oct 24, 2021. This period of downtime will be scheduled for necessary updates to be applied to the network servers.

[Go to your Time-Sheet](#)

3 days ago

**Time-Sheet Submission Reminder**

Hello Sumeet, Please don't forget to submit your time-sheet before the end of business hours today!

[Go to your Time-Sheet](#)

**ZAPOBJECTS**

**Dynamics 365** | Zap Notifications

Search

Notifications have already been generated. No changes allowed when configuration record is in Published status.

### Scheduled Network Downtime - Saved

Zap NO General Notifications

**General** | In-App Msg (Bell) | Users To Include | Users To Exclude | Teams To Include | Related

**General**

Name \* Scheduled Network Downtime

Notify As In-App ☒

Create Thunder Notification ☐

**In-App Notification Settings (Bell)**

Icon Type Info

Toast Type Timed

Priority Normal

Expiry Time Format Days

2 minutes ago

**Scheduled Network Downtime**

Hi Sumeet, Please be advised that the network will be unavailable from 01:00am to 05:30am on Oct 24, 2021. This period of downtime will be scheduled for necessary updates to be applied to the network servers.

**Notifications**

Dismiss all

2 minutes ago

**Scheduled Network Downtime**

Hi Sumeet, Please be advised that the network will be unavailable from 01:00am to 05:30am on Oct 24, 2021. This period of downtime will be scheduled for necessary updates to be applied to the network servers.

20 hours ago

**Time-Sheet Submission Reminder**

Hello Sumeet, Please don't forget to submit your time-sheet before the end of business hours today!

[Go to your Time-Sheet](#)

## Steps for creating General Bell Notification - 1

**Bell Notifications**

Thunder Notificati...

**Troubleshooting**

Event Log

Trigger Notificatio...

User - Disabled S...

User - Disabled S...

**Notification Preference - Category (Optional)**

Category **Company**

Sub-category **Announcements**

Settings

# Steps for creating General Bell Notification - 2

**Dynamics 365** | Zap Notifications

Search

Save Save & Close **Publish** New Deactivate Delete Refresh Check Access Assign Share Email a Link Flow Word Templates Run Report

Notifications would be generated only when this configuration record has been published! Please note that no changes are allowed after this record has been published.

## Scheduled Network Downtime - Saved

Draft Status Reason Sumeet Ballani Owner

**1** General **2** In-App Msg **3** Users To Include **4** Users To Exclude Teams To Include Related

Name \* Scheduled Network Downtime

Notify As In-App ☒ Notify As Email ☐

### In-App Notification Settings

Icon Type	Info
Toast Type	Timed
Priority	Normal
Expiry Time Format	Days
Expiry Time	30

### Notification Preference - Category (Optional)

Category	Company
Sub-category	Announcements

**Generate Notifications in Bulk: OnDemand, based on Triggers OR based on Recurring Pattern + Email Notifications + Form Notifications**

Dynamics 365Zap Notifications

Search

SBSB

<

[Icon]

[Icon]

Save

Save & Close

New

Deactivate

Delete

Refresh

Check Access

Assign

Share

Email a Link

Flow

Word Templates

Run Report

Notifications have already been generated. No changes allowed when configuration record is in Published status.

Scheduled Network Downtime - SavedPublishedStatus ReasonSumeet BallaniOwner

Zap NO General Notifications

GeneralIn-App Msg (Bell)Users To IncludeUsers To ExcludeTeams To IncludeRelated

Data

TitleScheduled Network Downtime

BodyHi {{!systemuser.firstname}}, Please be advised that the network will be unavailable from 01:00am to 05:30am on Oct 24, 2021. This period of downtime will be scheduled for necessary updates to be applied to the network servers.

Use merge fields within message body!

Enable Action 1☐

Enable Action 2☐

Auto-Generate Json Data☒

Data{"title":"Scheduled Network Downtime","body":{"hi {{!systemuser.firstname}}}, Please be advised that the network will be unavailable from 01:00am to 05:30am on Oct 24, 2021. This period of downtime will be scheduled for necessary updates to be applied to the network servers."}

Token Generate HelperSelectField TokenEntityUserFieldFirst Name (firstname)LINKLinkToken{{!systemuser.firstname}}

# Steps for creating General Bell Notification - 4

**Dynamics 365** | Zap Notifications

Search

Save Save & Close **Publish** + New Deactivate Delete Refresh Check Access Assign Share Email a Link Flow Word Templates Run Report

Notifications would be generated only when this configuration record has been published! Please note that no changes are allowed after this record has been published.

## Scheduled Network Downtime - Saved

Zap NO General Notifications

Draft Status Reason Sumeet Ballani Owner

General In-App Msg Users To Include Users To Exclude Teams To Include Related

**Data**

Title	* Scheduled Network Downtime
Body	Hi {{!systemuser:firstname}}, Please be advised that the network will be unavailable from 01:00am to 05:30am on Oct 24, 2021. This period of downtime will be scheduled for necessary updates to be applied to the network servers.
Enable Action 1	<input type="checkbox"/>
Enable Action 2	<input type="checkbox"/>
Auto-Generate Json Data	<input checked="" type="checkbox"/>
Data	{"title":"Scheduled Network Downtime","body":"Hi {{!systemuser:firstname}}, Please be advised that the network will be unavailable from 01:00am to 05:30am on Oct 24, 2021. This period of downtime will be scheduled for necessary updates to be applied to the network servers."}

**Token Generate Helper**

Entity	User
Field	First Name (firstname)
Link	<input type="checkbox"/>
Token	{{!systemuser:firstname}}

**Confirmation Message**

Notifications for Users would be automatically generated. Henceforth, no changes to this configuration record would be allowed.

**Proceed** **Cancel**



# Steps for creating General Bell Notification - 5

**Dynamics 365** | Zap Notifications

Search

Notifications have already been generated. No changes allowed when configuration record is in Published status.

### Scheduled Network Downtime - Saved

Zap NO General Notifications

Published Status Reason | Sumeet Ballani Owner

General In-App Msg Users To Include Users To Exclude Teams To Include Related

**Data**

Title	* Scheduled Network Downtime
Body	Hi {{!systemuser:firstname}}, Please be advised that the network will be unavailable from 01:00am to 05:30am on Oct 24, 2021. This period of downtime will be scheduled for necessary updates to be applied to the network servers.
Enable Action 1	<input type="checkbox"/>
Enable Action 2	<input type="checkbox"/>
Auto-Generate Json Data	<input checked="" type="checkbox"/>
Data	{"title":"Scheduled Network Downtime","body":"Hi {{!systemuser:firstname}}, Please be advised that the network will be unavailable from 01:00am to 05:30am on Oct 24, 2021. This period of downtime will be scheduled for necessary updates to be applied to the network servers."}

**Token Generate Helper**

Entity	User
Field	First Name (firstname)
Link	<input type="checkbox"/>
Token	{{!systemuser:firstname}}

Notifications generated successfully!

In-app Notifications count: 1

Email Notifications count: 0

Ok

Dynamics 365

Zap Notifications

Search

Home

Recent

Pinned

Bell & Email Noti. Configuration

General Notificati...

Trigger Notificatio...

Recurring Notifica...

Noti. User Preference

Category

Sub-category

Set Personal Noti...

Form Noti. Configuration

Entity Configurati...

Conditional Form ...

Settings

Global Settings

Multi-language C...

Miscellaneous

Notifications would be generated when this configuration is in Published status and is triggered by your workflow.

Case Assign - Saved

Zap NO Trigger Notifications

General

In-App Msg (Bell)

Email Msg

Dynamic Users

Users To Include

Users To Exclude

Teams To Include

Related

General

Name \* Case Assign

Notify As In-App ☒

Select Entity\* Case

Create Thunder Notification ☐

In-App Notification Settings (Bell)

Icon Type Info

Toast Type Timed

Priority High

Expiry Time Format Days

Expiry Time 30

Notification Preference - Category (Optional)

Category Helpdesk

Sub-category Case Assignment

Notifications

Dismiss all

20 minutes ago

Case Assigned

Dear Sumeet, Case has been assigned to you!  
Below are the Case details:  
Case Title: Zap Copy Record - Error Message  
Case Number: ZAP-18653315  
Case Customer: Syncratec  
Priority:  
Created On: 9/21/2021 4:32 PM

Open record

2 days ago

Opportunity Nearing Close Date Rem...

Dear Sumeet, Your Opportunity is nearing Close date! Below are the details:  
Topic:: Walmart | Zap Helpdesk App  
Account: Walmart  
Contact: Dan Cary  
Est. Revenue: \$4,300.00  
Est. Close Date: 9/27/2021

Open Record

2 days ago

Scheduled Network Downtime

Hi Sumeet, Please be advised that the network will be unavailable from 01:00am to 05:30am on Oct 24, 2021. This period of downtime will be scheduled for necessary updates to be applied to the network servers.

3 days ago

Time-Sheet Submission Reminder

Hello Sumeet, Please don't forget to submit

Steps for creating Trigger Bell Notification - 1

Troubleshooting

Event Log

Trigger Notificatio...

User - Disabled S...

User - Disabled S...



# Steps for creating Trigger Bell Notification - 3

**Dynamics 365** | Zap Notifications

Search

Notifications would be generated when this configuration is in Published status and is triggered by your workflow.

**Case Assign** - Saved  
Zap NO Trigger Notifications

Draft  
Status Reason | Sumeet Ballani  
Owner

General **In-App Msg (Bell)** Email Msg Dynamic Users Users To Include Users To Exclude Teams To Include Related

**Data**

Title \* **Case Assigned**

Body

Dear {{systemuser:firstname}}, Case has been assigned to you! Below are the Case details:  
1. Case Title: {{incident:title}}  
2. Case Number: {{incident:ticketnumber}}  
3. Case Customer: {{incident:customerid}}  
4. Priority: {{incident:prioritycode}}  
5. Created On: {{incident:createdon}}

Token Generate Helper

Select Field Token  
Entity Case  
Field Case Title (title)  
Link ☐  
Token {{incident:title}}

**Token Generator**

8 minutes ago

**Case Assigned**  
Dear Sumeet, Case has been assigned to you!  
Below are the Case details:  
Case Title: Zap Copy Record - Error Message  
Case Number: ZAP-18653315  
Case Customer: Syncratec  
Priority:  
Created On: 9/21/2021 4:32 PM  
[Open record](#)

**Notification**


**Automatically JSON Data Created**









`{"title":"Case Assigned","body":"Dear {{systemuser:firstname}}, Case has been assigned to you! Below are the Case details:\n1. Case Title: {{incident:title}} \n2. Case Number: {{incident:ticketnumber}}\n3. Case Customer: {{incident:customerid}}\n4. Priority: {{incident:prioritycode}} \n5. Created On: {{incident:createdon}} ","actions":[{"title":"Open record","data":{"url":"{{incident:title}}","navigationTarget":"inline"},"null"]}`



**E.g. Use-Case: Insert Case Field Values within the Case Assignment Notification**



# Steps for creating Trigger Bell Notification - 5





 Power Apps

File  Save and Close    Activate  Convert to a real-time workflow  Show Dependencies  Solution Layers  Actions ▾


 Process: Notify on Case Assignment  
 **Information**

We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!

Common

-  Information
-  Audit History
-  Solution Health Rules
-  Solution Health Rules

Process Sessions

-  Process Sessions

General Administration Notes

Hide Process Properties

Process Name \*

Activate As

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

Category



Options for Automatic Processes

Scope

Start when:

- ☐ Record is created
- ☐ Record status changes
- ☒ Record is assigned
- ☐ Record fields change
- ☐ Record is deleted

Select

Add Step ▾  Insert ▾  Delete this step.

Type a step description here.

Zap.Apps.Notifications (1.0.0.0):Zap.Apps.Notifications.CreateTriggerBellNotification

Set Properties

# Steps for creating Trigger Bell Notification - 6

Power Automate

Search for helpful resources

Environments  
Zap Objects

Save Flow checker Test

Case Assignment Flow

When a row is added, modified or deleted

- \* Change type: Modified
- \* Table name: Cases
- \* Scope: Organization
- Select columns: ownerid
- Filter rows: Enter an OData style filter expression to determine which rows can trigger the f
- Delay until: Enter a time to delay the trigger evaluation, eg. 2020-01-01T10:10:00Z
- Run as: Choose the running user for steps where invoker connections are used

Hide advanced options

Perform an unbound action

- \* Action Name: zap\_no\_create\_trigger\_bell\_notification\_action
- Trigger\_Config\_Name: case assign
- Unique\_Identifier: Case x

+ New step Save

Chat with a bot

Trigger whenever Case is Assigned

Call "Zap Action" & pass on the "Trigger Configuration" reference as well as "current record" reference.

Notify User on Case/Lead Assignment using Power Automate

ZAPOBJECTS

**Dynamics 365 | Zap Notifications**

Search

Home Recent Pinned Bell & Email Noti. Configuration General Notification... Trigger Notification... **Recurring Notification...** Noti. User Preference Category Sub-category Set Personal Noti... Form Noti. Configuration Entity Configuration Conditional Form ... Settings Global Settings

Opportunity Nearing Close Date Reminder - Saved  
Zap NO Recurring Notifications

General **In-App Msg (Bell)** Schedule Dynamic Users Users To Include Users To Exclude Teams To Include Related

Data

Title \* Opportunity Nearing Close Date Reminder

Body

Dear {{!systemuser.firstname}},  
Your Opportunity is nearing Close date! Below are the details:  
1. Topic:: {{!opportunity.name}}  
2. Account: {{!opportunity.parentaccountid}}  
3. Contact: {{!opportunity.parentcontactid}}  
4. Est. Revenue: {{!opportunity.estimatedvalue}}  
5. Est. Close Date: {{!opportunity.estimatedclosedate}}

Enable Action 1 ☒

Action1 Title Open Record

Action1 URL {{!opportunity.name}}

Token Generate Help Select Entity Field Link Token

Notifications

Dismiss all

a few seconds ago

**Opportunity Nearing Close Date Rem...**

Dear Sumeet, Your Opportunity is nearing Close date! Below are the details:  
Topic: Walmart | Zap Helpdesk App  
Account: Walmart  
Contact: Dan Cary  
Est. Revenue: \$4,300.00  
Est. Close Date: 9/27/2021

Open Record

4 hours ago

**Scheduled Network Downtime**

Hi Sumeet, Please be advised that the network will be unavailable from 01:00am to 05:30am on Oct 24, 2021. This period of downtime will be scheduled for necessary updates to be applied to the network servers.

a day ago

**Time-Sheet Submission Reminder**

Hello Sumeet, Please don't forget to submit your time-sheet before the end of business hours today!

Go to your Time-Sheet

## Steps for creating Recurring Bell Notification - 1

Bell Notifications Thunder Notification... Troubleshooting Event Log Trigger Notification... User - Disabled S...

Auto-Generate Json Data ☒

Data

```
{
  "title": "Opportunity Nearing Close Date Reminder",
  "body": "Dear {{!systemuser.firstname}},\nYour Opportunity is nearing Close date! Below are the details:\n1. Topic: {{!opportunity.name}}\n2. Account: {{!opportunity.parentaccountid}}\n3. Contact: {{!opportunity.parentcontactid}}\n4. Est. Revenue: {{!opportunity.estimatedvalue}}\n5. Est. Close Date: {{!opportunity.estimatedclosedate}}",
  "actions": [
    {
      "title": "Open Record",
      "data": {
        "url": "{{!#opportunity.name}}",
        "navigationTarget": "dialog"
      },
      "null": true
    }
  ]
}
```

**E.g. Use-Case: Notify Users whenever their Opportunity is nearing Est. Close Date**

**ZAPOBJECTS**



# Steps for creating Recurring Bell Notification - 2

**Dynamics 365** | Zap Notifications

Search

Save Save & Close Publish + New Deactivate Delete Refresh Check Access Assign Share Email a Link Flow Word Templates Run Report

Notifications would be generated as per schedule while configuration is in Published status.

## Opportunity Nearing Close Date Reminder - Saved

Zap NO Recurring Notifications

Draft Status Reason Sumeet Ballani Owner

General In-App Msg (Bell) Schedule Dynamic Users Users To Include Users To Exclude Teams To Include Related

1 2 3 4

General

Name \* Opportunity Nearing Close Date Reminder

Notify As In-App ☒ Notify As Email ☐

Notification Audience \* Select Users

Recurring Notification Type \* Entity-Related

Create Thunder Notification ☐

Entity-Related

Select Entity\* Opportunity

Specify Condition Using \* View

Select View\* Open Opportunities Nearing Est. Close Date

In-App Notification Settings (Bell)

Icon Type	Info
Toast Type	Timed
Priority	Normal
Expiry Time Format	Days
Expiry Time	30

Notification Preference - Category (Optional)

Category	Opportunity
Sub-category	Nearing Close Date

# Steps for creating Recurring Bell Notification - 3

Dynamics 365

Zap Notifications

Search

Lightbulb

+

Filter

Bell

Settings

?

SB

Home

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Bell & Email Noti. Configuration

General Notificati...

Trigger Notificatio...

Recurring Notifica...

Noti. User Preference

Category

Sub-category

Set Personal Noti...

Form Noti. Configuration

Entity Configurati...

Conditional Form ...

Settings

Global Settings

Multi-language C...

Miscellaneous

Bell Notifications

Thunder Notificati...

Troubleshooting

Event Log

Trigger Notificatio...

User - Disabled S...

User - Disabled S...

←

↶

Save

Save & Close

Unpublish

New

Deactivate

Delete

Refresh

Check Access

Assign

Share

Email a Link

Flow

Word Templates

Run Report

! To make any changes to this configuration record, click button "Unpublish!"

Opportunity Nearing Close Date Reminder - Saved

Zap NO Recurring Notifications

Published Sumeet Ballani

General

In-App Msg (Bell)

Schedule

Dynamic Users

Users To Include

Users To Exclude

Teams To Include

Related

Data

Title

\* Opportunity Nearing Close Date Reminder

Body

Dear {{!systemuser:firstname}},  
Your Opportunity is nearing Close date! Below are the details:  
1. Topic:: {{!opportunity:name}}  
2. Account: {{!opportunity:parentaccountid}}  
3. Contact: {{!opportunity:parentcontactid}}  
4. Est. Revenue: {{!opportunity:estimatedvalue}}  
5. Est. Close Date: {{!opportunity:estimatedclosedate}}

Enable Action 1

☑

Action1 Title

Open Record

Action1 URL

{{!opportunity:name}}

Action1 Navigation Target

Dialog

Enable Action 2

☐

Auto-Generate Json Data

☑

Data

{ "title": "Opportunity Nearing Close Date Reminder", "body": "Dear {{!systemuser:firstname}},\nYour Opportunity is nearing Close date! Below are the details:\n1. Topic:: {{!opportunity:name}}\n2. Account: {{!opportunity:parentaccountid}}\n3. Contact: {{!opportunity:parentcontactid}}\n4. Est. Revenue: {{!opportunity:estimatedvalue}}\n5. Est. Close Date: {{!opportunity:estimatedclosedate}}", "actions": [{"title": "Open Record", "data": {"url": "{{!#opportunity:name}}", "navigationTarget": "dialog"}}, null] }

Token Generate Helper

Select

Field Token

Entity

Opportunity

Field

Topic (name)

Link

☐

Token

{{!opportunity:name}}

Dynamics 365

Zap Notifications

Search

?

+

🔍

🔔

⚙️

?

S8

☰

Home

Recent

Pinned

Bell & Email Noti.  
Configuration

General Notificati...

Trigger Notificatio...

Recurring Notifica...

Noti. User Preference

Set Personal Noti...

Category

Sub-category

Form Noti. Configuration

Entity Configurati...

Conditional Form ...

Settings

Global Settings

Multi-language C...

Miscellaneous

Notifications

Thunder Notificati...

Troubleshooting

Event Log

Trigger Notificatio...

User - Disabled S...

User - Disabled S...

<

🔄

💾 Save

💾 Save & Close

📄 Publish

+ New

🗑️ Deactivate

🗑️ Delete

🔄 Refresh

🔍 Check Access

👤 Assign

🔗 Share

✉️ Email a Link

🏎️ Flow

📄 Word Templates

📊 Run Report

🔔 Notifications would be generated as per schedule when this configuration is in Published status.

Opportunity Nearing Close Date Reminder - Saved

Zap NO Recurring Notifications

Draft

Status Reason

Sumeet Ballani

Owner

General

In-App Msg (Bell)

Schedule

Dynamic Users

Users To Include

Users To Exclude

Teams To Include

Related

Report Frequency \* Daily

Time Zone \* (GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi

Start Date \* 9/21/2021 6:51 PM No End Date ☒

End Date ---

Daily (Select Days)

Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐

Friday ☒ Saturday ☐ Sunday ☐

Schedule Time (hr) \* 09 AM

Schedule Time (min) \* 00

Scheduled Time - Buffer (MM) 02

Run-Time Statistics

Last Run Date-Time 09/21/2021 07:19:53 PM Next Run Date-Time 09/24/2021 09:00:00 AM

# Steps for creating Recurring Bell Notification - 5

Dynamics 365

Home

Recent

Pinned

Zap Alerts Pro

General Bell Notificat...

Trigger Bell Notificati...

Recurring Bell Notific...

Notifications

Entity Configuration

Conditional Form No...

Global Settings

Multi-language Conf...

Event Log

Zap License

License

Zap Alerts Pro

Zap Alerts Pro

Recurring Bell Notifications

Opportunity Nearing Est. Close Date Reminder

Save

Save & Close

Publish

New

Deactivate

Delete

Refresh

Assign

Share

Email a Link

Flow

Word Templates

Run Report

Notifications would be generated as per schedule when this configuration is in Published status.

Opportunity Nearing Est. Close Date Reminder

Zap NO Recurring Bell Notifications

Draft

Status Reason

Sumeet Ballani

Owner

General

Schedule

Message

Dynamic Users

Users To Include

Users To Exclude

Teams To Include

Related

Select User Fields

Owner x

**Dynamics 365** | Zap Notifications Generator

Search

Try the new look

Save Save & Close **Publish** + New Deactivate Delete Refresh Check Access Assign Flow Word

Notifications would be generated only when this configuration record has been published! Please note that no changes are allowed after this record has been published.

### General Notification

Network Downtime - Unsaved  
Zap NO General Notifications

General In-App Msg (Bell) Email Msg **Push Notification** Users To Include Users To Exclude Teams To Include Related

App Name\* Sales Hub

Open App ☐

Body \* Good Morning {{!systemuser:firstname}}, Please be advised that the network will be unavailable from 01:00am to 05:30am on Oct 24, 2023. This period of downtime will be scheduled for necessary updates to be applied to the network servers.

App Name msdync\_saleshub

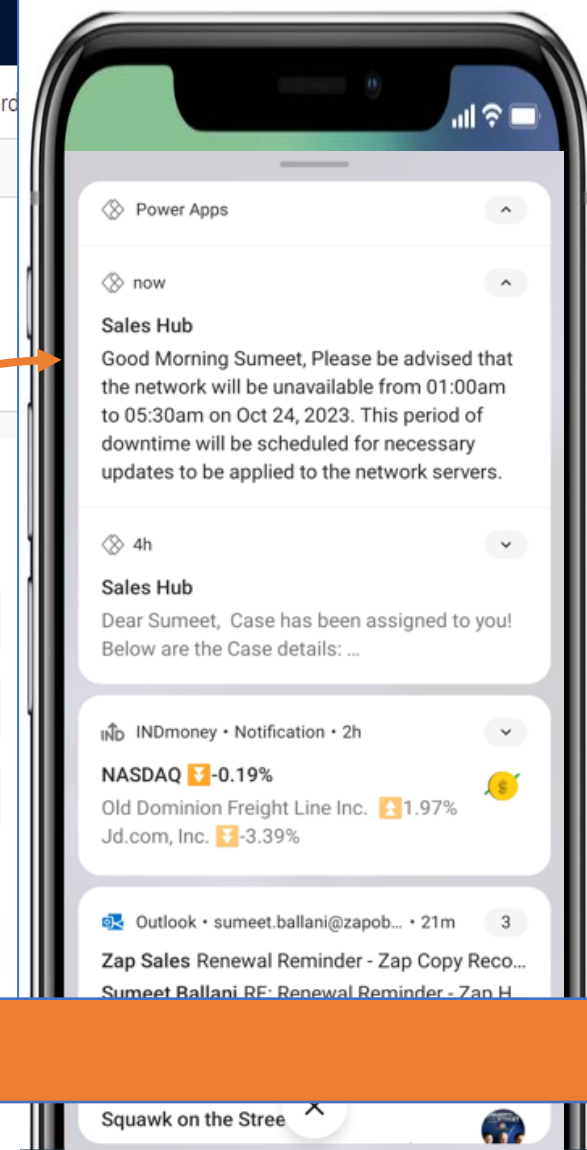
Select Held Token

Entity User

Field First Name (firstname)

Link ☐

Token {{!systemuser:firstname}}



Generate Push Notification - Sample 1

Push Notifications –  
Received on your Mobile

Dynamics 365

Zap Notifications Generator

Search

Try the new look

Home

Recent

Pinned

Bell & Email Noti. Configuration

General Notificati...

Trigger Notificatio...

Recurring Notifica...

Noti. User Preference

Category

Sub-category

Set Personal Noti. ...

Form Noti. Configuration

Conditional Form ...

←

Save

Save & Close

Publish

New

Deactivate

Delete

Refresh

Check Access

Assign

Flow

Notifications would be generated when this configuration is **3**shed status and is triggered by your workflow.

Case Assign - Saved

Zap NO Trigger Notifications

General

In-App Msg (Bell)

**1**Push Notification

Email Msg

**2**Dynamic Users

Users To Include

Users To Exclude

Teams To Include

Related

App Name\*

Sales Hub

Open App

☒

Body

\* Dear {{!systemuser:firstname}}, Case has been assigned to you! Below are the Case details:  
Case Title: {{!incident:title}}  
Case Number: {{!incident:ticketnumber}}  
Case Customer: {{!incident:customerid}}  
Case Status: {{!incident:statuscode}}  
Created On: {{!incident:createdon}}

App Name

\* msdynce\_saleshub

Token Generate Helper

Select

Field Token

Entity

Case

Field

Select Field

Link

☐

## Trigger Notification

Generate Push Notification - Sample 2

Power Apps

45m

**Sales Hub**

Good Morning Sumeet, Please be advised that the network will be unavailable from 01:00am ...

4h

**Sales Hub**

Dear Sumeet, Case has been assigned to you! Below are the Case details:  
Case Title: Request trial of Zap Email Parser  
Case Number: ZAP-18654173-G5N7K  
Case Customer: Dummy Account  
Case Status: New Response  
Created On: 9/19/2023 11:22 AM

Outlook • sumeet.ballani@zapob... • 39m 2

Kevin Harris RE: Renewal Reminder - Zap Cop...  
Allison Brown [Opportunity approaching due d...

Google Podcasts • 2h

Push Notifications – Received on your Mobile

Dynamics 365

Zap Notifications Generator

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Set Personal Noti. ...

Form Noti. Configuration

Conditional Formi ...

Save

Save & Close

Publish

New

Deactivate

Delete

Refresh

Check Access

Assign

Flow

Notifications would be generated as per schedule when this c is in Published status.

Time-Sheet Reminder - Saved

Zap NO Recurring Notifications

General

In-App Msg (Bell)

Push Notification

Schedule

Users To Include

Users To Exclude

Teams To Include

Related

App Name\*

Sales Hub

Open App

Body

\* Hello {{!systemuser.firstname}},  
Please don't forget to submit your time-sheet before the end of business hours today!

App Name

\* msdynce\_saleshub

Token Generate Helper

Select

Field Token

Entity

User

Field

First Name (firstname)

Link

Recurring Notification

Generate Push Notification - Sample 3

# Zap Notifications Generator – Allow Users to switch On/Off - Notifications / Alerts

**Dynamics 365** | Zap Notifications Generator

Search

New look ☐ ? + ⚙ ? ⌚ 📄

- Home
- Recent
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- Bell & Email Noti. Configuration
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  - Trigger Notificatio...
  - Recurring Notifica...
- Noti. User Preference
  - Category
  - Sub-category
  - Set Personal Noti. ...

Category	Sub-Category	Enable In-App	Enable Email	Enable Push
Company	Announcements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Timesheet Reminder	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Post Mentions	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Helpdesk	New Case	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	New Response	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Opportunity	Close Date Reminder	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Close (Won/Lost/Cancelled)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Each User can switch on/off the notification (besides, admin could make some of them mandatory too)

**ZAPOBJECTS**



# Zap Notifications – Form Notifications

The screenshot displays the Microsoft Dynamics 365 interface for the 'ABC Solutions' account. The top navigation bar shows 'Dynamics 365' and 'Sales Hub'. The left sidebar lists various sections like 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', 'Activities', 'Licenses', 'Calendar', 'Customers', 'Accounts', 'Contacts', 'Sales', 'Leads', 'Opportunities', 'Competitors', 'Marketing', and 'Marketing Lists'. The main content area shows the 'ABC Solutions' account details, including 'Account Name', 'Originating Lead', 'Account Number', 'Address 1: City', 'Microsoft Partner?', 'Dynamics Partner?', 'Territory', 'Archived- Territory', and 'Custom Number'. A notification is displayed at the top of the account details section, stating: 'The account is on credit-hold. Please contact finance team for more info.' This notification is highlighted with a red dashed box and labeled 'Inline Form Notification'. A red arrow points from this label to the notification. Another red arrow points from the 'Form Notifications' label to a pop-up window titled 'Notifications' that also displays the same message. The pop-up window is also highlighted with a red dashed box and labeled 'Pop-up Form Notification'. The 'Form Notifications' label is located in a white box with red text. The background of the interface is dark blue, and the account details are in a light gray box.

**Form Notifications**

**Inline Form Notification**

**Pop-up Form Notification**

ABC Solutions  
Account · Account

Summary Opportunities Licenses Email Reader Attachment

ACCOUNT INFORMATION

Account Name \* ABC Solutions

Originating Lead ---

Account Number ---

Address 1: City ---

Microsoft Partner? ☐

Dynamics Partner? No

Territory ---

Archived- Territory ---

Custom Number ACC-08415-0620

Notifications

The account is on credit-hold. Please contact finance team for more info.

Dismiss all

# Zap Notifications Generator – Sample Form Notifications

**Dynamics 365** | Sales Hub

Search

Marketing Lists  
Quick Campaigns  
Campaigns  
Collateral  
Quotes

Customer is on Credit Hold. Please contact Account Manager before proceeding.

**Case Not Created** - Saved  
Case · Case

Phone to Case Process  
Active for 30 minutes

Identify (30 Min)

Summary Zap Email Reader SLA SLA KPI Email Reply

**Dynamics 365** | Sales Hub

Home Recent Pinned My Work

Always address Customer as "Doctor"

JP John  
Contact · Contact

Summary Email Reader Insights Details Scheduling

**Dynamics 365** | Sales Hub

Home Recent Pinned

Please discuss regarding Zap Helpdesk Solution with the Customer

CU C  
Account · Account

Alert your Sales / Support User with IMP. information about Customer when form is opened

ZAPOBJECTS

# Zap Notifications Generator – Display Inline Notifications in **Related** Form

The screenshot shows a web application interface for a 'SANDBOX' case. At the top, there's a dark blue header with the word 'SANDBOX' in white. Below the header is a toolbar with icons for navigation and actions like 'Save', 'Save & Close', 'Save & Route', 'Refresh', 'New', 'Mark Read', 'Resolve Case', and 'Cancel Case'. A red rectangular box highlights a warning message: 'WARNING: Account Executive does not want this Account/Facility to be contacted.' Below the warning, the case ID 'CAS-01216-F6Z9H5' is displayed next to a text input field, followed by '- Saved'. Underneath, there's a 'Case Overview' section with a horizontal tab bar containing 'Patient Info', 'Invoices', 'Facility and Provider', 'Procedure', 'Prior Auth / Prior Results', and 'Timeline/Audit Trail'. The 'Case Overview' tab is selected. At the bottom, a table displays case details:

Case Number	CAS-01216-F6Z9H5	Priority	Normal	Case Title

Use Case: Notify when Case form is opened (with a warning message as shown in screenshot above) if the related Customer (Account) record has a flag checked

# Getting Started

- Zap Notifications features page ([link](#))
- To request trial email [sales@zapobjects.com](mailto:sales@zapobjects.com) with below details:
  - Company Name:
  - Contact Number:
  - Requirements: