

Virto SharePoint Alerts Web Part

User and Installation Guide

SP 2010 — version 4.1.2 SP 2013 — version 5.1.10 SP 2016 — version 5.1.20 SP 2019 — version 5.1.20

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System/Developer Requirements

Server

Software: Microsoft Office SharePoint Server 2013, Microsoft .NET Framework 4.5 Hardware and software requirements for SharePoint 2013: https://technet.microsoft.com/enus/library/mt493254(v=office.16).aspx

Note: This product is not compatible with SPS 2010 and WSS v2.

Client

Browser: Microsoft Internet Explorer (9+), Mozilla Firefox, Opera, Google Chrome.

Virto SharePoint Alerts Web Part Installation

This section describes how to install, upgrade, uninstall, or contact Support for the Virto SharePoint Alerts web part.

Expected Outage

The expected outage time is from 2 minutes to several hours depending on your hardware and number of SharePoint sites. Though we recommend all Virto users to upgrade on a weekend.

Installing Virto SharePoint Alerts

Before you begin, you need to make sure you have access to the server and your account must have the appropriate administrative privileges to install applications.

To access Virto SharePoint Alerts Setup program download **Virto.SharePoint.20XX.AlertsAndReminders.zip** file and unzip it. Run extracted Setup.exe file.

The setup wizard window will appear.

Virto Alert and Reminder WebPart for SharePoint 2013
Virto Alert and Reminder WebPart for SharePoint 2013 Welcome to the Virto Alert and Reminder WebPart for SharePoint 2013 setup wizard
VIRTO SOFTWARE Thank you for choosing VirtoSoftware
This setup wizard will install and deploy Virto Alert and Reminder WebPart for SharePoint 2013 to your SharePoint 2013 farm.
www.virtosoftware.com

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Virto SharePoint Alerts wizard performs a system check prior to the installation. All the system checks must be completed successfully in order to proceed with the installation. After the checks have completed, click "Next".

Virto Alert and Reminder WebPart for SharePoint 2013		
System Check Checking if Virto Alert and Reminder WebPart for SharePoint 2013 can be installed from this machine	5	
 Microsoft .NET Framework 4.0 is installed. Windows SharePoint Foundation 2013 is installed. You have permission to install and deploy SharePoint solutions. The Windows SharePoint Services Administration service is started. The Windows SharePoint Services Timer service is started. Solution file found. Virto Alert and Reminder WebPart for SharePoint 2013 is not installed. 		
All checks succeeded. Please click Next to proceed with the installation.		
www.virtosoftware.com	bort	

Check "I accept the terms in the License Agreement" and click "Next".

Virto Alert and Reminder WebPart for SharePoint 2013			
End-User License Agreement			
Please read the following license agreement carefully			
End User License Agreement (EULA)			
END-USER LICENSE AGREEMENT FOR VIRTO KANBAN BOARD WEB PART			
Please review the following license agreement before installing or using the Virto Kanban Board Web Part software product and/or its related materials. If you agree to the terms herein then you must click the "I ACCEPT" button at the bottom of this license before you are permitted to use this software and related documents.			
Definitions: This Virtosoftware Ltd. End-User Software License Agreement ("EULA") is a legal agreement between you (either as an individual user, corporation or single entity) and Virtosoftware Ltd. for the Virto Kanban Board Web Part product which includes computer software, and may include associated media. printed materials. and "online" or electronic documentation			
✓ I accept the terms in the License Agreement			
www.virtosoftware.com			

Select the web application(s) where you want to install the product. **Warning**: You must be logged in to the SharePoint server with a Site Collection Administrator account to automatically activate this feature.

Virto Alert and Remir	nder Web	Part for ShareP	oint 2013	
Site Collection Deployment	Targets	:		1
Please select one or more web applications / site collections				J
Web Applications / Site Collections:				
	(Virto Home)	(3 site collections)		
Please click the Next button to start the installation process.				
			N	
www.virtosoftware.com		Previous	<u>N</u> ext	<u>A</u> bort

Then click "Next".

Virto Alert and Reminder WebPart for SharePoint 2013		
Installing Please wait while Virto Alert and Reminder WebPart for SharePoint 2013 is installed		
WORKFLOW SUITE		
230+ workflow activities, status monitor and workflow scheduler in ONE PACK		
Activating feature(s) on 3 site collections.		
Previous Next Abort		

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Click "Close" to complete the installation.

Virto Alert and Reminder WebPart for SharePoint 2013	
Installation Successfully Completed	5
Details: ***** SOLUTION DEPLOYMENT ***** VMSP2013DEMO : http://spdemo.virtosoftware.com/ : The solution was successfully deployed. VMSP2013DEMO : http://spdemo.virtosoftware.com/ : The solution was successfully deployed. ***** FEATURE ACTIVATION ***** http://spdemo.virtosoftware.com : 04a0514c-8f99-943d-388e-67be: http://spdemo.virtosoftware.com/sites/French : 04a0514c-8f99-943d-388e-67be http://spdemo.virtosoftware.com/sites/Strona Główna : 04a0514c-8f99-943d-388e-67be	<
www.virtosoftware.com	

Note: installation procedure is similar for SharePoint 2013 and 2016 versions.

SPFx Web Part Installation

To start using Virto Alerts and Reminders web part on modern sites/pages of SharePoint 2019 please do the steps as follows.

1) To install Virto Alerts and Reminders web part run Setup.exe file as administrator under the farm administrator account.

2) Create App Catalog in your SharePoint if necessary: https://docs.microsoft.com/enus/sharepoint/administration/manage-the-app-catalog.

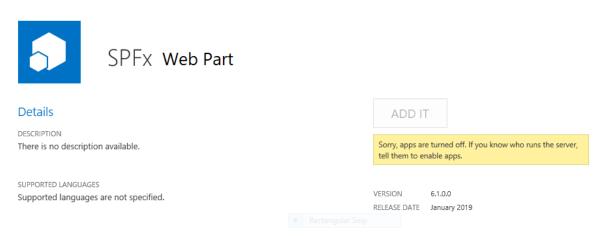
The .sppkg file will be automatically uploaded to "Apps for SharePoint". Now you can add Virto Alerts and Reminders on the modern pages/sites.

Note! Please do not use administrator account to install and activate SPFx web part.

Error "Sorry apps are turned off": What to Do

If you are trying to install the web part on SharePoint 2019 server and got below error while Adding it to vour site:

App Catalog + Add Apps +



Sorry, apps are turned off. If you know who runs the server, tell them to enable apps.

Possible Reasons and Solutions

Reason	Solution
Apps are not enabled in your farm	Make sure your have Apps enabled in your SharePoint 2019
	farm.
Subscription service is not setup	The first and most probably problem would be the
	subscription service is not configured in your farm. Please
	configure it.
App management service is not associated with your web	Make sure App Management Service Application is
application	associated with your web application where you want to add
	the SPFx web part.
App Url is not configured	If you have not configured the App Urls. please ensure you
	have given values to App Domain and App Prefix in your App
	Store settings.

If after ensuring above solutions, you still have the same error, please <u>register a ticket</u> to let our technicians analyze the problem.

License Activation

To see full instruction for successful activation of your component, please read our blog.

Upgrading Virto SharePoint Alerts

If you already use Virto SharePoint Alerts web part and need to upgrade it to the latest version, download the.zip file from <u>http://www.virtosoftware.com</u>. Unzip the file and run setup.exe.

On the step 3 check the box "Upgrade" and click "Next".

Note: if you had activated the license while installing the previous Virto SharePoint Alerts version, you do not need to activate it again.

Uninstalling Virto SharePoint Alerts

To uninstall the component:

- 1. Double click the Setup.exe extracted from downloaded Virto.SharePoint.20XX.AlertsAndReminders.zip file.
- 2. The program performs the system checks again. Once that has successfully completed, the program prompts you to Repair or Remove the solution. Select Remove, and click "Next".

Virto Alert and Reminder WebPart for SharePoint 2013
Repair or Remove Image: Constraint of the operation of the ope
Virto Alert and Reminder WebPart for SharePoint 2013 is already installed. What would you like to do?
 Repair Retracts the solution from all web applications and deploys it once again.
Retracts the solution from all web applications and deletes it from the SharePoint solution store.
www.virtosoftware.com

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Administration and Usage

SharePoint Alerts Web Part Administration

Once you have added Virto SharePoint Alerts to the site page, you have to adjust the web part.

IRT					Q) SHARE 🏠 FOLLOW 😭
ielvetica Ne 🕌 141 🚽	<u>/. A</u> . 🖗		AaBbCcl AaE AaB Paragraph Heading 1 Heading 2	Text Ec	irce 🛼 Convert to XH	
5 t			Ch. 1			
Font		Paragraph	Styles	Layout	Markup	
Virto Alerts an	d Remin		Styles	Layout	Markup	Minimize
Virto Alerts an	d Remin	ders		Layout	Markup	Minimize

There you have to create a new communication type (smtp or sms), select user groups allowed to create alerts, and you can also define an External host path.

External host path allows users to replace the host part of the site link, item link, and item URL, that can be inserted in e-mail alert messages. This feature is usually used to provide SharePoint users logged in

from external local domain with a public host path to the SharePoint web server. For example, if you enter http://wssportal.yourcompany.com/, outside users will receive alerts with links on item but site links in their e-mail alerts will be changed from http://YourInternalServerName/ to http://wssportal.yourcompany.com/... and will be available for those outside of the network.

Communications List

Title Olickatell sms1 sms2 smtp1 smtp2 	> × × × × × × × × × × × × × × × × × × ×
Create New Communic Select the Site Group(s create own alerts. Only the site administrat modify these permission	s) permitted to tor is allowed to
 dev Members dev Owners dev Visitors 	
Show all alerts	

External	http://virto.com
Host	
Path:	

Click "Create new communication settings" to add a new communication type. In case the global server is not adjusted, the e-mail messages can't be sent. Please ensure the smtp server is properly adjusted and doesn't have security restrictions, which are interrupting alert email delivery.

SMTP

You can adjust SMTP server which will be used to send alerts and notifications. In order to do this, uncheck the box "Use standard SharePoint outgoing settings".

Communication Settings

Fill out all the required fields and click Save button below. Communication Settings Title smtp2 SMTP SMS Clickatell Sms Gateway Use standard SharePoint outgoing settings SMTP Server smtp.google.com Port 587

Then fill in the following fields:

SMTP server - enter SMTP server (for example, smtp.google.com);

Port – enter SMTP server port. 25 is default (for Google, for example, 587);

Use SSL checkbox - check it if you need to use SSL (required for Google);

From Email – enter address on behalf of which SMTP server will send email messages. Most servers check this address, and it is required to create an account on the mail server and send messages on behalf of it.

Use specific user credentials checkbox. If it is unchecked, email sending is organized without authentication. In case SMTP server requires authentication (for example, Google) check this box and fill out fields **User Name** and **Password**.

From E-mail			
virto@virto.com			
✓ Use specific user credentials			
User Name			
user@virto.com			
Password			
•••••			
You can check now your settings and try to send test letter. Type [To:] email, and then click "Test Letter" button for checking			
To: test@yourcompany.co Test Letter			
Save Close			

Once you have entered all the required fields, type your email address in the "To" field and use "Test Letter" to check if the settings are correct and SMTP server works. The message about correct or incorrect settings will appear.

SMS Adjustment

If you select SMS, you have to fill out the following fields:

SMS Server Host - enter SMS server host (for example, smsserver.com);

SMS Server Port – enter SMS server port (2000 on the sample picture);

From Contact Number – enter the phone number which will be displayed as a number from which the SMS was sent.

Address Range is defined by SMS provider.

System ID and System Password – information of user registered by provider.

Sms Server Host	
smsserver.com	
Sms Server Port	
25	
From Contact Numb	er
2000	
Address Range	
777	
System ID	
15	
10	
System Password	
•••••	
Save	Close

Click "OK" to save the settings of SMS communication.

Note: SharePoint Server needs Internet connection for sending SMS Alerts. Local connection is not enough for successful operation.

Clickatell SMS Gateway

Tick the "Clickatell SMS Gateway" box in the settings. Enter the API ID, name on behalf of which the alerts will be sent, and enter user credentials (user on behalf of which the alert will be sent).

Fill out all the required fields and click Save button below.
Communication Settings Title
Clickatell
 SMTP SMS Clickatell Sms Gateway
API_ID
Virto
From Contact Number
User Name Virto
Password
Save Close

You have to register on www.clickatell.com and register the HTTP product. Go to the HTTP API page and click on the grey button 'Register for Free' in the upper right corner of the page. Fill in your registration credentials on the registration form and click "submit". The 3 parts of information that you need to send in SMS are your "username", your "password", and your API_ID. Your API_ID gets issued immediately upon confirmation of registration.

Note: after registration you will automatically receive 10 FREE SMS credits which you can use for testing.

Now, use the following information for creating Clickatell communication and fill out the displayed fields: user: xxxxx password: xxxxx api_id: xxxxx

Learn more how to create a Clickatell connection https://www.clickatell.com/developers/api-documentation/http-api-send-message/ https://archive.clickatell.com/developers/api-docs/http-using-the-http-api/

Click "Save" and continue adjustment.

Note: SharePoint Service needs Internet connection for sending SMS Alert using Clickatell service. Local connection is not enough for successful operation.

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SharePoint Alerts Usage

You have to add Virto SharePoint Alerts web part to a SharePoint Site page.

SharePoint	Newsfeed OneDrive Sites administrator 🗸 🔅 ?
BROWSE PAGE FORMAT TEXT INSERT	🗘 Share 🟠 FOLLOW 😭 SAVE [-]
Table Media Link Upload Parts Embed Categories Parts Parts	d
_	
Forms	s Virto Alerts and Reminders
Media and Content	Use the Virto Alerts and Reminders to customize your SharePoint alerts.
Search	
Search-Driven Content	
Social Collaboration	
Virto Solutions	
Upload a Web Part -	
4	Add part to: Rich Content T
	Add Cancel
Home	
Dagas	

Click "Add Alert" to create a new alert.

Information form with four tabs will be displayed: "General", "Recipients", "Message View", and "Options".

Virto Alerts and Reminder	rs			
👃 Add Alert 🛛 👶 Add Reminder	Enable	▶ Disable 🗴 Delete		${oldsymbol ho}$ Enter alert title or list
Title	List	Change type Send for these changes	Schedule	Recipients Created by Status
There are no items				

In the "General" tab you have to enter a title for new alert. Then select a web and a SharePoint list, which changes you will follow with this alert.

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Create New Alert			×
≔ General			
Title *	Title		
Web	http://192.168.0.3	T	
List	Alerts test	T	
Change Type	All changes	¥	
Communication Type *	🖉 SMTP 🗏 SMS 🗏 Clickatell Sms Gateway	smtp1 •	
Status	🖉 Enable 🗏 Disable		
@ Recipients			
Message View			
≣ Options			

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Select action about which the alert will notify. Six actions are available in the current version:

Save

Cancel

- All changes (combines all cases together);
- New items are added;
- Existing items are modified;
- Items are deleted;
- Attachments are added to item;
- Attachments are deleted from item.

Change Type	All changes •
Communication Type * Status	All changes New items are added Existing items are modified
	Items are deleted Attachments are added to item Attachments are deleted from item

You need to select communication type. These settings can be adjusted in "Edit web part".

In case you have several communication types adjusted, you can choose a required one from dropdown menu.

If a communication type is not adjusted, this value is displayed as unavailable (grayed out "Clickatell Sms Gateway" on the picture below).

Communication Type *	🖉 SMTP 🗏 SMS 🗏 Clickatell Sms Gateway	smtp1
		smtp1
Status	🖉 Enable 🗏 Disable	smtp2

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Now, choose "Enable" or "Disable" status. "Disable" means the created alert will not be sent.

Recipients Settings

Switch to **Recipients** tab. Here you can add a list of recipients who will receive this alert.

By default, a user can send alerts to himself only (to "Me").

Your must have an administrator permission or be a member of a group listed in web part's settings to send alerts to other users.

@ Recipients	
To:	×Me × Contact List +
CC:	Select user(s)
BCC:	Select user(s)
From:	From E-mail (e.g. support@virtoway.com From Title (e.g. Virto Team)
ReplyTo:	ReplyTo E-mail (e.g. support@virtoway.cd) ReplyTo Title (e.g. Virto Team)

Note: pay attention to the fields "From" and "ReplyTo". The default address is <u>support@virtoway.com</u>. Please change the default address to your company address.

If you have the administrator's permission, there are several options of recipients' selection.

The first option is a **Set of users or e-mail addresses**. You can start typing at least 3 letters of a username or user group and get suggestions with an autocomplete option.

Also, you can select any current list's fields, that contain users (Assigned to, Created by, Modified by, etc.). For example, you can select "Assigned to" option to send alerts to users assigned to work with a task. This option enables to set any amount of names or addresses.

	20	
Create New Alert		×
≔ General		
@ Recipients		
To:	×Me Modified By	
	Me (SPUser)	
CC:	administrator (SPUser)	
	mvv (SPUser)	
BCC:	dev Owners (SPGroup)	
_	dev Visitors (SPGroup)	
From:	Created By (SPField)	
ReplyTo:	ReplyTo E-mail (e.g. support@virtoway.co ReplyTo Title (e.g. Virto Team)	

The second option is **Me**. An alert email message will be sent to the user who has created this alert.

The third option is **External email addresses**. You can type an address in the field and press Enter to save it in recipients list.

@ Recipients		
То:	×Me ×virto@virtosoftware.com virto1@l	×
	No results found	

You can assign multiple recipients in this field and select both recipients from a field in current list and recipients with emails. In this case, you will send them all this alert.

You can also send alerts to users from a SharePoint Contact list.

Click on "+" next to Contact List and fill out fields to select location, name, and view of list.

To:	×Me ×administrator ×Created By ×virto@virtosoftware.com	×
	Contact List — Location	
	http://192.168.0.3	•
	Name *	
	cont	•
	List View *	
	All contacts	•

Next, you can add optionally field values for carbon copy and blind carbon copy. These fields have the same rules to add addresses as the field "To".

CC:	×dev Owners	×
BCC:	×dev Members	×
From:	support@virtoway.com	Virto Team
ReplyTo:	support@virtoway.com	Virto Team

You can also add "From" and "ReplyTo" values to your email alert.

Note: Please ensure the smtp server is properly adjusted and doesn't have security restrictions, which are interrupting alert email delivery.

Message Template Settings

Switch to the Message View tab.

There you can see default alert tags in message body, which you can change as well as any other information in a message.

bject *	Test alert
ader 🕂	
dy *	Format V B I U $\bullet \bullet \bullet$ A V E E E C III III IIII IIII IIIII IIIIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII
	Item Title - Change Type
	All fields values

Footer 🕂

Default tags are already displayed on message body. You can delete them and add your tags by clicking on tag icon.

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Create New A	Alert	Ado	d tag value	3
i≣ General @ Recipients		Tag	All fields values All fields values Change Type Edit Item Link Item Link Item Title	
☑ Message \ Subject *	√iew Test alert		List Link List Title Site Title	
Header 🛨 Body *	Format ~	BI		
	Item T	itle -	Change Type	

Click "+" next to Header or Footer to open and customize these sections.

Subject *	Test alert
Header —	Paragraph B I U W E E E E W
Body *	Heading 1 \checkmark B I \underline{U} at \textcircled{O} \checkmark A \checkmark E \equiv \equiv \equiv \boxdot \textcircled{O} \blacksquare \blacksquare \textcircled{O} Change Type
Footer —	Format \checkmark B I U \leftrightarrow \land \blacksquare

The "Body" section allows you to define a message view for recipients.

The result of template adjustment may look this way:

Subject *	Test alert
Header —	
	Paragraph \checkmark BIU $\bullet \bullet$ A \checkmark \blacksquare \blacksquare \blacksquare \blacksquare \blacksquare \blacksquare \blacksquare Paragraph \checkmark BIU $\bullet \bullet$ A \checkmark \blacksquare \blacksquare \blacksquare III
	VIRTO SOFTWARE
	The "Test alert" list has the following changes this week
Body *	
	Format \vee B I U \leftrightarrow A \blacksquare </td
	Old: Due Date Old: Title New: Due Date New: Title Ttem Link Learn more on <u>our site</u>
Footer 🚍	Format \vee B I \underline{U} ever \diamondsuit A \vee E E E E CO E III \checkmark
	VirtoSoftware © 2018 - Virto Alert.

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Alert recipients receive email messages as follows:

Test alert



The "Test alert" list has the following changes this week

2/14/2018	Event 1
2/24/2018	Event 1

Event 1 Learn more on our site

VirtoSoftware © 2018 - Virto Alert.

Message options

You may include links, pictures, or tables into the alert e-mail.

ග 🗳 🏢

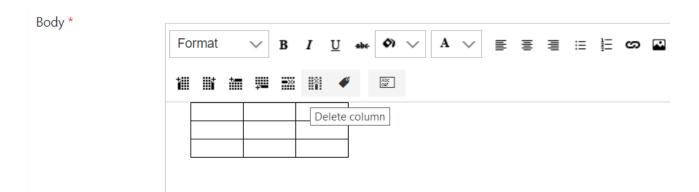
You can create tables in your alert and define the value of table border and columns width. Choose the count of columns and rows in your table.

3ody *	Heading 1 🗸	B I	U abc	۵ ۷	A 🗸	E E	≣ :	≡ 1Ξ	ග	~	₩₽	ø	Abc cet	
											Crea	ate a	3 x 3 tabl	e

Then define values for columns width and border in pixels.

Í	Set colun	nns width	×	Ì
	Column 1:	50	рх	H
ŗ	Column 2:	50	рх	Ē
	Column 3:	50	рх	
×	Border:	1	рх	
			Apply	

Now, you have a table in your alert message. You can add or delete columns and rows with additional buttons.



Note: if your alert has an item from lookup, the item will contain link to view form of this item. For example, if your alert has a "client" lookup field, you receive in alert this field with link to client's card view form from lookup.

Tags in links

Virto Alerts & Reminders Web part supports adding clickable elements to the message.

First, go to the SharePoint site page where you have added the Alerts web part and click "Add Alert".

	SharePoint				
BROWS	SE PAGE				
S	>	Alerts Onprem)		
Home	1	Virto Alerts and Reminders			
Docur	nents	You are using Trial Version of V	/irto Alerts and Reminde	rs. It's valid wit	hin 4 days. For more info
Recen	t	💄 Add Alert 🛛 🗟 Add Remind	l er Enable Dis	able 💼 Dele	te
21	-12-2021	🗌 Title	List	Change type	Send for these changes
20	-12-2021	🗌 🐥 🏲 🖍 💼 🛛 Alert	Documents	All changes	Apply to all items

The "New alert" form appears. Adjust the alert as you usually do. Then find the "Message View" block next. This is where we're going to add tags.

Create New Alert

≔ General	
@ Recipients	
🗹 Message View	
Subject *	Subject
Header 🕂	
Body *	Heading 1 \checkmark B I U $\bullet \bullet \bullet$ $\bullet $

Now click the "Insert hyperlink" icon.

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Body *	Heading 1 \checkmark B I

If previous versions allowed only the paste of hyperlinks to the message body, now you can see the enhanced functionality of hyperlinks with tags.

Insert hyperlink			×
Web address	http://	ø	1 1 1 1 1 1
Text		4	1 1 1 1 1 1 1 1
ТооІТір		ø	
	Open link in new window		
	Insert	Car	ncel

First, click "Add tag" next to the web address line. Here you can choose the option for the hyperlink. In our case, this is going to be an item link (for example, the URL of the new banner added to a SharePoint list). But there are many options. Use the one appropriate for your special case.

Create New Aler	t	Add tag value	×
		Tag	
≔ General		Edit Item Link	
@ Recipients		All fields values Table view fields changes Table view condition fields changes	
🗹 Message Vie	w	Change Type Edit Item Link	
		Item Link	_
Subject *	Subject	Item Title	
	·	List Link	
Header 🕂		List Title	
i ledder 1		Site Title	

Second, click "Add tag" next to the text field.

		2	7
Insert hyperlink			×
Web address	http://{{Item Link}}	4	28 28
Text		ø	200 201
ТооІТір		4	
	Open link in new window		
	Insert	Car	ncel

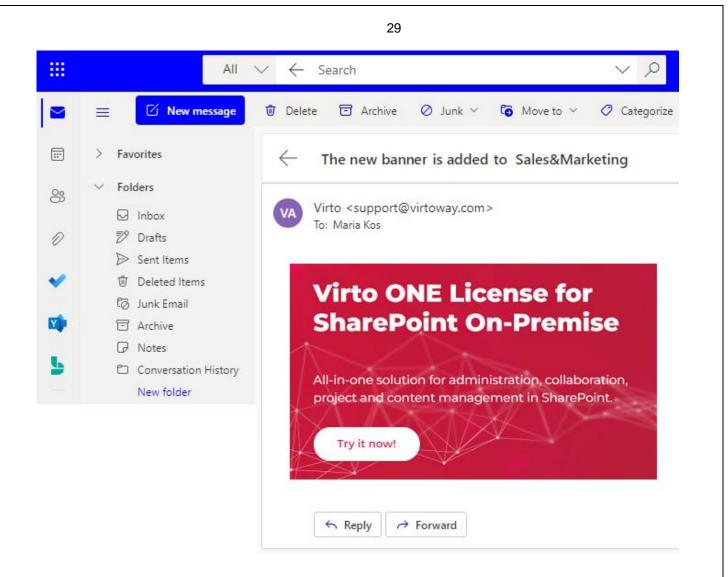
There are also many options. We pick the item title (for example, we'd like to show the title of the marketing campaign to which this banner refers).

Create New A	lert	Add tag value ×
		Тад
😑 General		Item Link 🗸
		All fields values
@ Recipients		Table view fields changes
		Table view condition fields changes
🗹 Message \	/iew	Change Type
		Edit Item Link
		Item Link
Subject *	Subject	Item Title
		List Link
Header 🕂		List Title
incoder [Site Title

Finally, you can add a tooltip. Click "Add tag" next to the tooltip field.

		28	
Insert hyperlink		×	
Web address	http://{{Item Link}}		
Text	{{Item Link}}		
ToolTip			
	Open link in new win	dow	
		Insert Cancel	
	at to display		
booco the elemen			
hoose the elemen	it to display.		
			1.0
hoose the elemen Create New Al		Add tag value	×
			×
Create New Al		Тад	×
		Tag Item Link 🗸	×
Create New Al ≔ General	lert	Tag Item Link ✓ All fields values	×
Create New Al	lert	Tag Item Link 🗸	×
Create New Al ∷ General @ Recipients	lert	Tag Item Link ✓ All fields values Table view fields changes Table view condition fields changes Change Type	×
Create New Al ≔ General	lert	Tag Item Link ✓ All fields values Table view fields changes Table view condition fields changes Change Type Edit Item Link	×
Create New Al ∷ General @ Recipients ☑ Message \	lert /iew	Tag Item Link ✓ All fields values Table view fields changes Table view condition fields changes Change Type Edit Item Link Item Link	×
Create New Al ∷ General @ Recipients	lert	Tag Item Link ✓ All fields values Table view fields changes Table view condition fields changes Change Type Edit Item Link Item Link Item Title	
Create New Al ∷ General @ Recipients ☑ Message \	lert /iew	Tag Item Link All fields values Table view fields changes Table view condition fields changes Change Type Edit Item Link Item Link Item Title List Link	
Create New Al ∷ General @ Recipients ☑ Message \	lert /iew	Tag Item Link ✓ All fields values Table view fields changes Table view condition fields changes Change Type Edit Item Link Item Link Item Title	

As a result, recipients receive the alert (or reminder, new tags also work for reminders) in their email client. The elements vary depending on the case. For example, you're notifying your team about a new banner added to the List with monthly marketing campaign information. And you need to send a link to this new banner. You do not have to paste an image to the message manually every time. the system will change it automatically. New campaign —new banner — new alert.



Field values change tracking

You can add to message some list field, which values will be sent in the created alert.

Click on the "Add field value" button in email body and choose required values for tracking in the created alert.

			30		
Create New	Alert	Add	field value	×	×
≔ General		Type Value	New	٣	
@ RecipienMessage		Field	% Complete Modified Modified By Name	•	4
Subject * Header + Body *	Subject	B <i>I</i> <u>U</u>	Number Order owshiddenversion Path Progld Property Bag		≣ ∷ ∷ ∽ ≅ ∰ ♥ 🖾
			URL Path User Version Workflow Instance ID Workflow Version Yes/No		2

In the following example, we will track "Title" field changes.

Choose "Old" or "New" value type for tracking and select a list field for created alert.

Add	field va	alue	×
Type Value	Old		Ţ
Field	Title		T
		Add	Cancel

Add some text, and the email body will look like follows:

Format	\sim	В	I	U	ape-	()	\sim	A	\sim		≣
Field "Ti	tle" ha	s bee	en ch	nange	ed fro	m 🔽	old: Tit	le to	New	: Title	
			Copyr	ight ©	2022 Al	l rights	s reserve	d. <u>ww</u>	v.virtoso	oftware	.com

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Options

You can create your own custom schedule to send SharePoint Alerts, that means you can define conditions for sending and a period when alerts should be delivered. For instance, you can receive an alert if someone changes an item only within working hours (8 AM to 5 PM). You can also define days of week to send alerts.

There you can also define an External host path.

External host path allows users to replace the host part of the site link, item link, and item URL, that can be inserted in e-mail alert messages. This feature is usually used to provide SharePoint users logged in from external local domain with a public host path to the SharePoint web server. For example, if you enter http://wssportal.yourcompany.com/, outside users will receive alerts with links on item but site links in their e-mail alerts will be changed from http://YourInternalServerName/ to http://wssportal.yourcompany.com/... and will be available for those outside of the network.

≣ Options		
Filter items	Apply to all items	Ţ
When To Send Alerts	Send notification immediately	•
Use External Host Path	http://virto.com	
		Save Cancel
- Apply to all iten	n the following view;	
Apply to all itemApply to items i	ns; n the following view;	

You can create a custom condition for more precise selection of items, that trigger the alert.

Click "Use condition" and define an item field, select a condition from list and type a value. You can add several conditions, using And and Or operators.

Filter items			Use condition(s)				•
Ð			Version	•	greater than	•	1
۲	And	•	Date	•	greater than	•	03/01/2018

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You can add new condition by clicking on "+" button or delete a condition using "X" button. To track changes in a specified list field, select "Use condition", choose the required field and use "was changed" or "not changed" condition.

Ð	Title				
Ð	Title	equals •	Enter value		
hen To Send Alerts	Send notification immediately	equals not equals		•	
se External Host Path	http://virto.com	contains greater than less than greater or equals less or equals is null			
		was changed not changed		Save	Canc

Filter items	Use condition(s)					
\oplus	Choice	•	equals	AIB	i	
When To Send Alerts	Send notification immediat	tely		•	delimiter is	ŀ

Then you have to define the alert schedule.

When To Send Alerts	Send notification immediately
Use External Host Path	Send notification immediately Send a daily summary Send a weekly summary Send on date depending on a field value

You can send it immediately after any changes occurred or create a daily or weekly summary schedule.

If alert condition was triggered a few times per day, all alert emails are merged in a single daily (or weekly) summary alert.

If you select "Send a daily summary", select required time from dropdown and tick boxes with days when you will to receive a summary.

	33	
When To Send Alerts	Send a daily summary	•
	10:00	
	Sunday	
	🖉 Monday	
	Tuesday	
	✓ Wednesday	
	Thursday	
	🔲 Friday	
	Saturday	

Alert will be sent according to settings at 10:00 only on Mondays and Wednesdays.

"Send a weekly summary" option allows you to send alert on a chosen day of week.

When To Send Alerts

Send a weekly summary	•
Friday	•
16:55	

The next option allows you to send alert on the specific date based on the list's date field value.

The e-mail will be send	Before •	ſ	0	days.
	Same			
	After			
Use External Host Path	Before After X number of days specified in field Before X number of days specified in field		8	
	Before X days with daily reminder After X days with daily reminder			

Same Date, After, and Before

You can send alert on the same date as the date from a chosen field value. In this case, you need to set the exact time when the alert will be sent.

		34		
When To Send Alerts	Send on date depending on a	a field value		¥
	Due Date			•
The e-mail will be send	Before	•	2	days.
	🗹 Set Time			
	12:30			

You can set time for "After" and "Before" options as well.

Note: If the format of a chosen field is not the Date and Time, but Date Only, you have to set time for alert sending. The same setting can be required if you send an alert for recurring events or for an all-day event.

When To Send Alerts	Send on date depending on a field value		
	Due Date	•	
The e-mail will be send	Before v 2 days.		
	Set Time		

If you do not define a time, in the example above it will be used time of field "Due Date". If this field has a date only and doesn't contain time, email will be sent in midnight, using server time.

The count of days from additional field

You can send an alert according to a day count from a value taken from a custom number type field. For example, you have in a list the Due Date field and a custom number type field.

\checkmark	Title	Number of days	Due Date
	Event 1	 4	2/14/2018
	Task 2	 3	2/14/2018

Select the option "Send on date depending on a field value" and choose Due Date field. Then you can assign a count of days from a custom field to send the alert.

For example, the value in the custom "Number of days" field is 3. Select the "After X number of days specified in field". Then choose the custom list field with a number. In this example, we have value "3" in this custom field.

This means, you will receive this alert on the third day after the date in the "Due date" field.

	35		
When To Send Alerts	Send on date depending on a field value	•	
	Due Date		
The e-mail will be send	After X number of days specified ir 🔹 Number of days	•	
	✓ Set Time		
	14:00		

Daily reminder

You can customize the schedule to send reminders.

It is possible to send daily reminder before or after the specified number of days.

In the example below, a user will receive reminders at 14:00 in 2 days after and 1 day after the event was modified.

When To Send Alerts	Send on date depending on a field value
	Modified v
The e-mail will be send	After X days with daily reminder v 2 days.
	✓ Set Time
	14:00

Press "Save" to save the created alert.

Alerts managing

When the list of alerts subscriptions is too large to find a required item, you can use search filter by title or list name

Virto Alerts and Reminders						
🜲 Add Alert 🛛 🛱 Add Reminder	▶ Enable ₽	Disable	Delete		₽ Enter ale	ert title or list
Title	List	Change type	Send for these changes	Schedule	Recipients	Created by Status
🔲 🜲 🏲 🖍 🛅 1	Alerts test	All changes	Apply to all items	Send on date depending on a field value	Me	administrator

You can enable/disable created alerts and reminders: tick the box opposite alert or reminder and click "Enable" or "Disable" button.

36						
Virto Alerts	and Reminder	rs				
🐥 Add Alert	🛱 Add Reminder	▶ Enable	► Disable	💼 Delete		
	Title		List	Change type		
🖬 🔪 ا 🔺 💌	1		Alerts test	All changes		
□ 🔺 🕨 🖍 🛅	2		Alerts test	All changes		

The current status of an alert or reminder is displayed on the left side. If the status mark is highlighted green, this alert/reminder is enabled.

Also, you are able to edit or delete created alerts by clicking on the corresponding symbol.

👃 Add Alert	🗟 Add Reminder	🕨 Enable	Disable	前 Delete
	Title		List	Change type
🗹 🜲 🕨 🖍 🛅	1		Alerts test	All changes
□ 🔺 🕨 🗖	2		Alerts test	All changes
🔲 🔺 🕨 🖉 🛅	3		Alerts test	All changes

SharePoint Reminders Usage

Virto Alerts and Reminders web part allows you to use email and sms reminders that are sent to remind about upcoming events or approaching deadlines.

Whenever you schedule a reminder, each user assigned to this reminder will receive email or sms with notification, which can include the fields that need his attention.

Click "Add Reminder" to create a new reminder.

Select a list with event(s) that you will be notified about. Type the title of the new reminder.

≔ General		
Title *	New reminder	
Web	http://192.168.0.3	T
List	Alerts test	T
Communication Type *	SMTP SMS Clickatell Sms Gateway	smtp1 •
Status	🖉 Enable 🗏 Disable	

This section is similar to Alerts customization, the difference is in the lacking "Change type" field.

The next two sections "Recipients" and "Message view" can be adjusted similar to Alerts customization.

Then you need to define options to follow up an event.

You can apply the reminder to all items in the list, to all items in a list view or create a custom condition to receive a reminder.

≣ Options		
Filter items	Apply to all items	•
When To Send Alerts	Apply to all items Apply to items in the following view Use condition(s)	
Alerts		
		Save Cancel

In this example, we will use a custom condition to track any upcoming meetings with clients.

≣ Option	IS						
Filter items		Use condition(s)					
\oplus			Lookup:Title	•	contains •	client	
\bigotimes	And	•	Category	•	equals •	meeting	
When To Send Alerts			Due Date				•
The e-mail	will be send		Before		• 1	day	S.
			✓ Set Time				
			13:00				

Then you need to set the schedule when you will to receive the notification.

You have to select a list field with time/date that will trigger the reminder sending and type the time when you need to receive the reminder.

In this example, the reminder will be sent one day before the event begins.

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	38						
When To Send	Start Time						
Reminder	The email will be send: Before 🔻 1 days.						
		Save	Cancel				
You can also se	nd daily remi	nders before or after the event.					
When To Send A	lerts	Due Date	•				
The e-mail will b	e send	Before X days with daily reminder • 3 days.					
		✓ Set Time					

The next option is the specified number of days in a list field. See **The count of days from additional field** section in Alert description of this documentation.

When To Send Alerts	Due Date 🔹
The e-mail will be send	After X number of days specified i 🔹 Number of days 🔹
	Same After Before
	After X number of days specified in field
	Before X number of days specified in field
Use External Host Path	Before X days with daily reminder
	After X days with daily reminder

Note: reminders for recurrent events are supported as well.

13:00

Now, you can manage all your alerts and reminders in a single view.

Virto Alerts and Reminders

🐥 Add Alert 🛛 🛱 Add Reminder 🕨 Enable 🌓 Disable 🧻 Delete					${oldsymbol ho}$ Enter alert title or list			
	Title	List	Change type	Send for these changes	Schedule	Recipients	Created by	Status
🗆 🔺 🕨 🖍 🛅	Virto Alert	for testing	All changes	Use condition(s)	Send notification immediately	Me	mvv	Success
🗆 🛱 🕨 🖍 🛅	Meeting reminder	Alerts test		Apply to all items	Send on date depending on a field value	Me	administrator	

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Version release history

2022-06-01	v. 5.1.20	[+] Allow add tag in links			
2021-11-05	v. 5.1.19	[-] Bug fix			
2020-11-05	v. 5.1.18	[*] Can be used as SPFX web part			
2019-10-21	v. 5.1.15	[-] Separate errors between Reminder items [-] Internal bugs			
2019-09-24	v. 5.1.14	[*] Notification "Same time"			
2019-08-08	v. 5.1.13	[*] Refactoring [-] Internal bug fixing			
2019-07-31	v. 5.1.12	[+] Tag 'Table view fields changes'			
2019-03-19	v. 5.1.11	[-] Internal bug fixing			
2019-01-15	v. 5.1.10	[*] Refactoring [-] Internal bug fixing			
2018-12-11	v. 5.1.9	[*] Changed logging [*] Changed logic of notification			
2018-11-27	v. 5.1.8	[-] Fixed Encoding problem of SPLIstItem values [-] Fixed Problem with empty header of Message View			
2018-11-15	v. 5.1.7	[*] Fix license validation			
2018-11-14	v. 5.1.6	[*] Internal optimization			
2018-10-01	v. 5.1.5	[+] Add ability Send separate e-mail for each item [+] Add support MS SQL Server for pending data			
2018-05-31	v. 5.1.4	[-] Fix some bugs[*] Improve UI[+] Add ability Include Item Attachments			
2018-05-24	v. 5.1.3	[+] Fix License messages			
2018-05-24	v. 5.1.2	[+] Paging request (GetRecipients) to asmx service			
2018-05-23	v. 5.1.1	[+] Logging GetRecipients function in asmx service			
2018-05-21	v. 5.1.0	[-] Fix css[-] Fix setting recipients (manual adding)[+] Ability to Customize email subject			
2018-05-15	v. 5.0.5	[-] Bug with reminder multi user field has been fixed.			
2018-05-10	v. 5.0.4	[*] Allow more users to update the alerts timer job.			
2018-04-19	v. 5.0.3	[-] Bug with multi user field has been fixed.			
2018-03-30	v. 5.0.2	[-] Bug with timer job has been fixed.			
2018-03-20	v. 5.0.1	New release for SharePoint 2013 and 2016 [+] UI redesign [+] CC copy, BCC copy, ReplyTo options were added [+] Extended features for alert email customization: pictures, links, tags, a field value tracking [+] Extended alert sending schedule			

