



Virto Office 365 Alerts and Reminders App

User and Installation Guide

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System/Developer Requirements

Operating System

Microsoft Windows Server 2008, 2012

Server

- *SharePoint Release 2013* (Microsoft Office SharePoint Server 2013; Microsoft .NET Framework 4.5)
- *Office 365*.

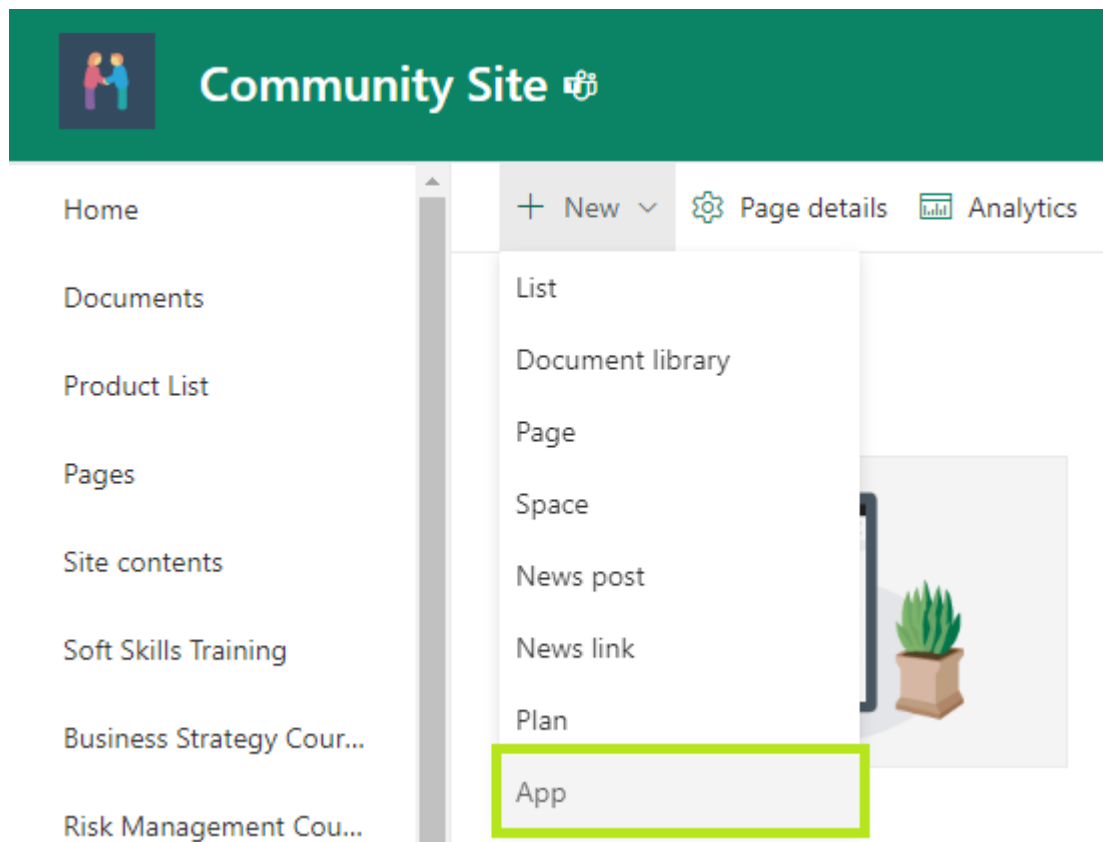
Note: *This product is not compatible with SPS 2003, SPS 2010 and WSS v2.*

Browser

Microsoft Internet Explorer, Mozilla Firefox, Opera, Google Chrome.

Virto SharePoint Alerts and Reminders Add-In Installation

To install the Virto Office 365 Alerts App to your SharePoint site, go to the site where you'd like to add it and pick "App" under "New" button.



Then choose "From SharePoint store" and search for Virto Alerts App (click "Find more apps in the SharePoint Store").

[← Back to Community Site](#)

My apps

Filter

All

From my organization

From SharePoint Store

Apps you can add

There are no SharePoint Store or custom apps such as Custom List, Document Library, Calendar, etc.

[Find more apps in the SharePoint Store. →](#)

Find Alerts App by Virtosoftware and click on it.

Categories

All

Best Apps of the Year

Business

Clocks & Calendars

Communication

Content Management

CRM



Alerts & Reminders by Virto

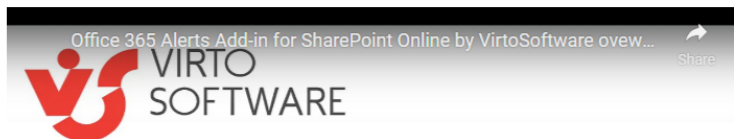
VirtoSoftware

Create alerts & reminders simple using conditions, settings for scheduling an...

★★★★★ (26)

Now switch to the classic SharePoint mode.

[← Back to SharePoint Store home](#)



SharePoint Alerts Add-In for Office365

Watch on YouTube



Alerts & Reminders by Virto

Provided by: VirtoSoftware

★★★★★ 4.7 (26 Ratings)

[→ Switch to the classic SharePoint Store](#)

This app is supported only in the classic SharePoint Store experience. You can switch to the classic experience now to add this app.

Then click "Add it".



Alerts & Reminders by Virto

from VirtoSoftware

[Find an a](#)

← Back to site | Virto Alert for Sharepoint Online

My alerts | All alerts | Queue | Settings | Subscription

Add Alert | Add Reminder | Alerts: 32/Unlimited

<input type="checkbox"/>	Title	List	Change type	Recipients	Send Alerts for Th...	Schedule	Created by			
<input type="checkbox"/>	My docs were cha...	Alerts list	Existing items are ...	Me;		Send a daily sun...	Kate Zhemosek			
<input type="checkbox"/>	Weekly changes r...	Alerts list	Existing items are ...	Me;	Apply to all items	Send a weekly su...	Kate Zhemosek			
<input type="checkbox"/>	Description chang...	Alerts list	All changes	Me;	Use condition(s)	Send a daily sun...	Kate Zhemosek			
<input type="checkbox"/>	Price changed	Alerts list	Existing items are ...	Me;virto@virto.co...	Apply to all items	Send notification l...	Kate Zhemosek			
<input type="checkbox"/>	Meeting reminder	Virto Kanban		Me;Assigned-To;	Use condition(s)	Send on date dep...	Kate Zhemosek			
<input type="checkbox"/>	Items modified	Documents	Existing items are ...	Me;	Apply to all items	Send notification l...	Kate Zhemosek			

Free

ADD IT

By acquiring this app you agree to its [permissions](#).

VERSION 2.0.0.0

RATING ★★★★★ (26)

RELEASE DATE October 2017

CATEGORY IT/Admin,Productivity,Workflow & Process M...

SUPPORT [App Website](#)

Then click “Continue” and “Purchase”. (The purchase button does not suppose you buy the product, it is free for the trial period.)



We're getting the details of your new app...

Select Purchase to buy this App or select Cancel to return to the App detail page.

Purchase

Cancel

Then return to site.



You just got this app for everyone in your organization.

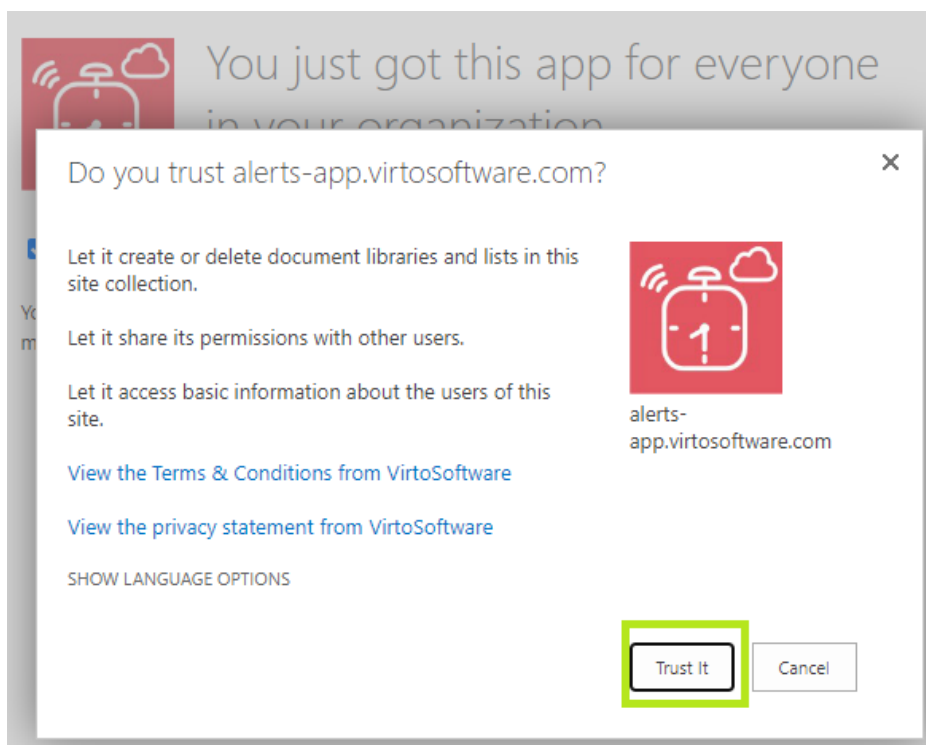
Alerts & Reminders by Virto

☒ Add this app to Community Site

You can add this app later on any site you can manage, or return to the [SharePoint Store](#) to get more apps.

Return to site

Confirm you trust the app.



Now the Alerts App appears in the site content as installed app. Click SharePoint Alerts icon to start working.

The screenshot shows a SharePoint 'Community Site' with a left-hand navigation pane and a main content area. The navigation pane includes links for Home, Documents, Product List, Pages, Site contents (highlighted), Soft Skills Training, Business Strategy Courses, Risk Management Courses, Marketing Team Vacation, and Sales Team Vacation. The main content area, under a '+ New' dropdown, lists various site assets and lists. The 'Alerts for Office 365 by Virto' app is highlighted with a green box at the bottom of the list.

Asset Type	Name	Type
Document library	Site Assets	Document library
Document library	Style Library	Document library
List	Business Strategy Courses	List
List	Marketing Team Vacation	List
List	Product List	List
List	Risk Management Courses	List
List	Sales Team Vacation	List
List	Soft Skills Training	List
App	Alerts for Office 365 by Virto	App

License Status

You can see your current license status by clicking on "Subscription" tab. You can create 10 alerts for free. Virto license is required to create more than 10 alerts in one site collection.

The screenshot shows the 'Subscription' tab for 'Virto Alert for SharePoint Online'. It displays license information and pricing options for different user counts and license types.

License Information:

- License name: Virto Alert Online Trial
- License status: Valid
- Domain: m365x42079013.sharepoint.com
- Expires on: 9/1/2022
- Alerts limit: 10
- Created alerts: 0

Subscription Options:

Subscribe to Virto ONE Cloud and save up to 77% of separate apps price

10 users across my company will use Virto Apps (minimum purchase for Virto One Cloud is 50 users)

License Type	Price	Buy Now For	You Save	Best For	Apps Included
Basic	\$119.00 tenant/mo	\$1,428 / year			Calendar, Kanban Board, Alerts & Reminders
Standard	\$12.92 user/mo	\$1,550 / year	\$1,658	Best for companies that need to increase general productivity in Office 365	Calendar, Kanban Board, Alerts & Reminders
Professional	\$20.63 user/mo	\$2,475 / year	\$4,331	Best for companies that need to increase general productivity and project management in Office 365	Calendar, Kanban Board, Alerts & Reminders
V1 Ultimate	\$25.00 user/mo	\$3,000 / year	\$6,183	Best for companies that need to get maximum flexibility in Office 365	Calendar, Kanban Board, Alerts & Reminders

Included:

- 250 Alerts and Reminders
- Recurrent events available

Administration and Usage

SharePoint Alerts Add-In Administration

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

Use “My alerts” and “All alerts” tabs to display and manage created alerts and reminders.

[← Back to site](#)
[Virto Alert for Sharepoint Online](#)
🔔
?
[Feedback](#)

[My alerts](#)
[All alerts](#)
[Queue](#)
[Settings](#)
[Subscription](#)

🔔 Add Alert
📅 Add Reminder
📊 Alerts: 10/100

<input checked="" type="checkbox"/>	Title	List	Change type	Recipients	Send Alerts for These Change...	Schedule	Created by	
<input type="checkbox"/>	Meeting reminder	testNewReminders		Me;	Apply to all items	Send on date from a field value	Victor Bushuev	▶ ⚙ ✖
<input type="checkbox"/>	Track list changes	ListTestNewAlerts	All changes	Me;	Apply to all items	Send notification immediately	Victor Bushuev	▶ ⚙ ✖
<input type="checkbox"/>	New docs added	testMetaData	New items are added	Me;	Apply to all items	Send notification immediately	Victor Bushuev	▶ ⚙ ✖
<input type="checkbox"/>	Deleted tasks alert	Tasks	Items are deleted	Me;virto@virto.com;	Apply to all items	Send notification immediately	Kate Zhernosek	▶ ⚙ ✖
<input type="checkbox"/>	Task reminder	testReminder		Me;	Apply to all items	Send on date from a field value	Victor Bushuev	▶ ⚙ ✖
<input type="checkbox"/>	New leads	testAlertRepeat	New items are added	Me;	Apply to all items	Send on date from a field value	Victor Bushuev	▶ ⚙ ✖
<input type="checkbox"/>	pr	Calendar	Existing items are modified	Me;	Use condition(s)	Send a daily summary	Kate Zhernosek	▶ ⚙ ✖
<input type="checkbox"/>	Alert	testALert	All changes	Me;u2vitbush@gmail.com;	Use condition(s)	Send on date from a field value	Victor Bushuev	▶ ⚙ ✖
<input type="checkbox"/>	Events are modified	CreatedByTest	Existing items are modified	Created-By;	Apply to all items	Send notification immediately	Victor Bushuev	▶ ⚙ ✖
<input type="checkbox"/>	Priority change alert	Calendar	Existing items are modified	Me;	Use condition(s)	Send a daily summary	Kate Zhernosek	▶ ⚙ ✖

The tab “Settings” allows you to add templates.

A user with administrator permission can select a Time Zone for this app. This feature is especially useful if you create alerts involving recipients from other time zones.

You have also the ability to define email and user, that are shown in recipient’s email as sender’s email and title.

Note: pay attention to the fields “E-mail From” and “E-mail Reply-To”. The default address is support@virto.com. Please change the default address to your company address.

My alerts All alerts Queue Settings Subscription

Select your Time Zone:

(UTC-06:00) Central Time (US & Canada) ▼

E-mail From:

Type here e-mail:

support@virto.com

Type here title:

Virto Team

E-mail Reply-To:

Type here e-mail:

support1@virto.com

Type here title:










Virto Team

You can adjust default header and footer for alerts and notifications across current site collection. This view will be applied to empty headers and footers. If the Alerts app on a particular site has already customized header or footer, the old view will not be overwritten.


Email Header

[illegible]

Email Footer

Paragraph  **B** *I* U        

VirtoSoftware

 VIRTO
SOFTWARE

Then you can set a list of users or user groups who can create alerts.

Select SharePoint groups and users who can create alerts for other users and external emails:

Type here group name, or user name, or user e-mail:

List of allowed groups and users

-  Dmitry Leytner ✕
dle@virto.com
-  Team Site Owners ✕
-  Alex Linn ✕
al@virto.com

You can apply settings to current site or to all sites across your site collection.

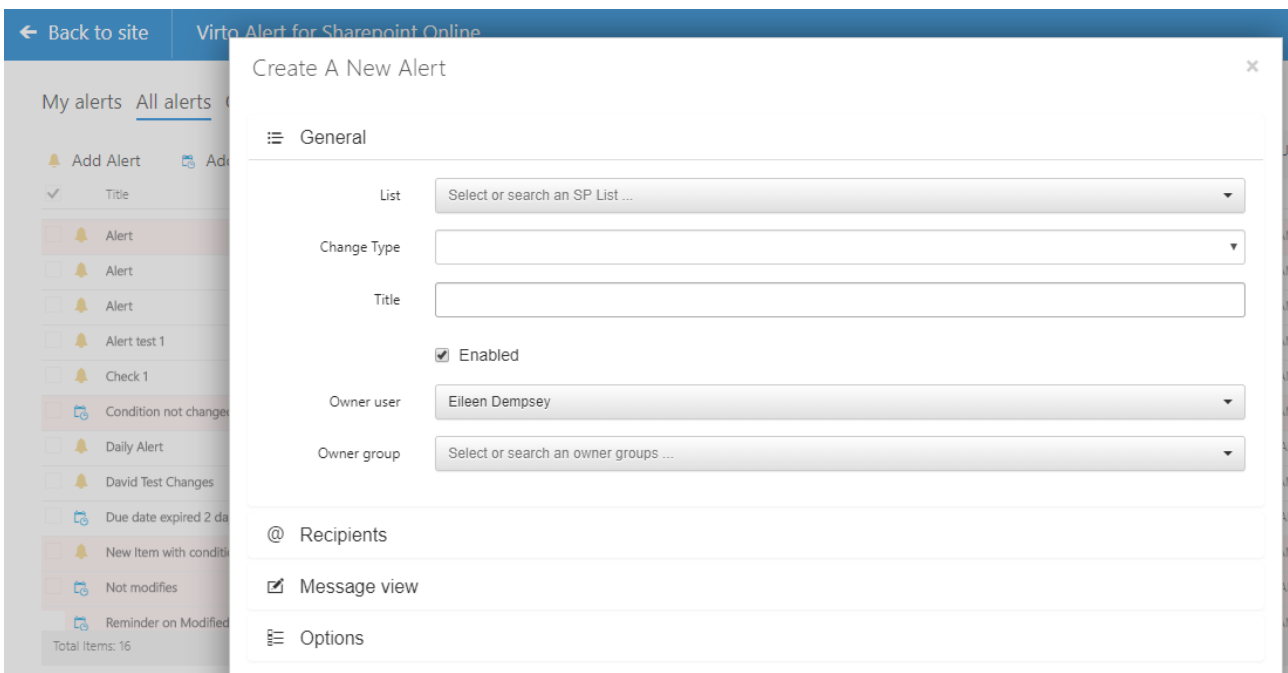
If you apply template to all sites and a particular site's app is already customized manually, the changes will not be applied to this customized app's settings.

SharePoint Alerts Usage

Click "Add Alert" to create a new alert.

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

Open "General" tab and select a SharePoint list to create alert for its changes. You may also select a folder (for example, the "Documents" folder).



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

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

Fill out the required field “Title”. This is a title of new Alert Subscription.

Create A New Alert

☰

General

List

Products

Change Type

All changes

Title

Virto Alert

☒ Enabled

Select “Enable” or “Disable” status. You can disable subscriptions temporary. In this case, alerts will not be created and sent.

Usually, only the administrator and the alert creator (owner) have the ability to edit an alert. If an alert owner was fired, only the administrator has access to these alerts, or you can change the alert owner and give permission to edit certain alerts to any other user.

☒ Enabled

Owner user

Eileen Dempsey

Owner group

Hierarchy Managers

You can import and export an existing alert. This feature allows to propagate the same alert from one list to another as well as to a list on other site collection.

Owner group
Select or search an owner groups ...

@ Recipients

✎ Message view

☰ Options

Import
Export
Save
Cancel

Recipients

Now switch to **Recipients** tab. The list of recipients who will receive alerts is defined here.

@ Recipients

To:
Me ✕ Type a emails or title of user fields (ex.: Created By, Modified By)

CC:
Type a emails or title of user fields (ex.: Created By, Modified By)

BCC:
Type a emails or title of user fields (ex.: Created By, Modified By)

MS Teams Webhook URL:
https://outlook.office.com/webhook/
Microsoft Teams Incoming Webhook Connector URL

You must have administrator right to send alerts to other users.

My alerts
All alerts
Settings
Subscription

Select users who can create alerts for other users and external emails

Type here user name or e-mail:
Search

List of allowed users

Kate Silver (ezh@virtoway.com) ✕

Nick Brook (nv@virtoway.com) ✕

Save

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

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

This option enables to set any number of names or addresses.

Create A New Alert

General

@ Recipients

Recipients

Me alex

Alex Shell

Alex Ant

Alex Linnik

Message view

Options

Save Cancel

The second option is **Me**.

In this case, an alert's email message will be sent to the user who has created this alert.

Click on users' icon next to the recipients' field to display the dropdown menu with user fields of current list. In the following example, these are fields Assigner to, Created by, and Modified by.

This option is used when it is required to organize alerts sending to users taken from a specified field. For example, it can be used if you need to send alerts to users assigned to work with a task. Select "Assigned to" and send alerts to users from according to the field of the current list.

Create A New Alert

General

@ Recipients

Recipients

Me Type a emails or title of user fields (ex.: Created By, Modified By)

Add user field value

Field

Assigned To

Created By

Modified By

Me

You can also add user groups as recipients the same way.

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

You can also add recipients to Carbon Copy and Blind Carbon Copy fields, and set email addresses to be displayed as "From" and "ReplyTo".

MS Teams Webhook URL is an integration option with Microsoft Teams. There you can add a MS Team channel as a recipient and show the alert message in chat.

Note: you can also set default addresses for “From” and “ReplyTo” on Virto Alert Settings page (tab Settings).

Create A New Alert

General

@ Recipients

To:

Me x

Demo Visitors x

Type a emails or title of user fields (ex.: Created By, Modified By)

CC:

Dmitry Leytner x

Type a emails or title of user fields (ex.: Created By, Modified By)

BCC:

Created By x

Type a emails or title of user fields (ex.: Created By, Modified By)

MS Teams Webhook URL:

https://outlook.office.com/webhook/

Microsoft Teams Incoming Webhook Connector URL

From:

Email: virto@virto.com

Title: Virto team

ReplyTo:

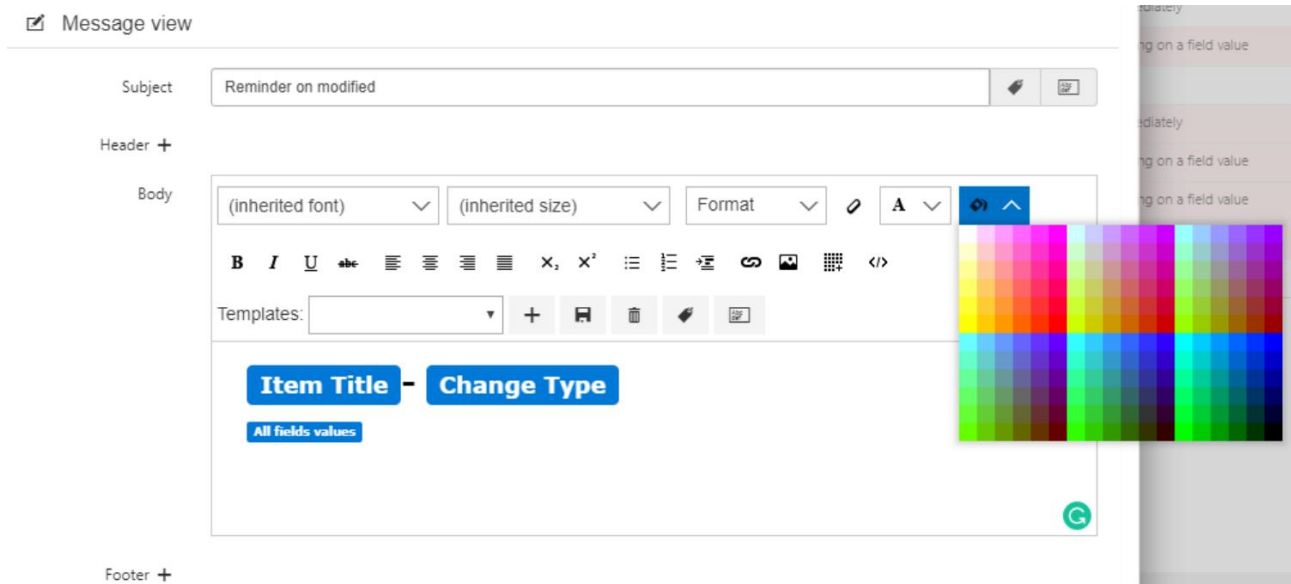
Email:

Title:

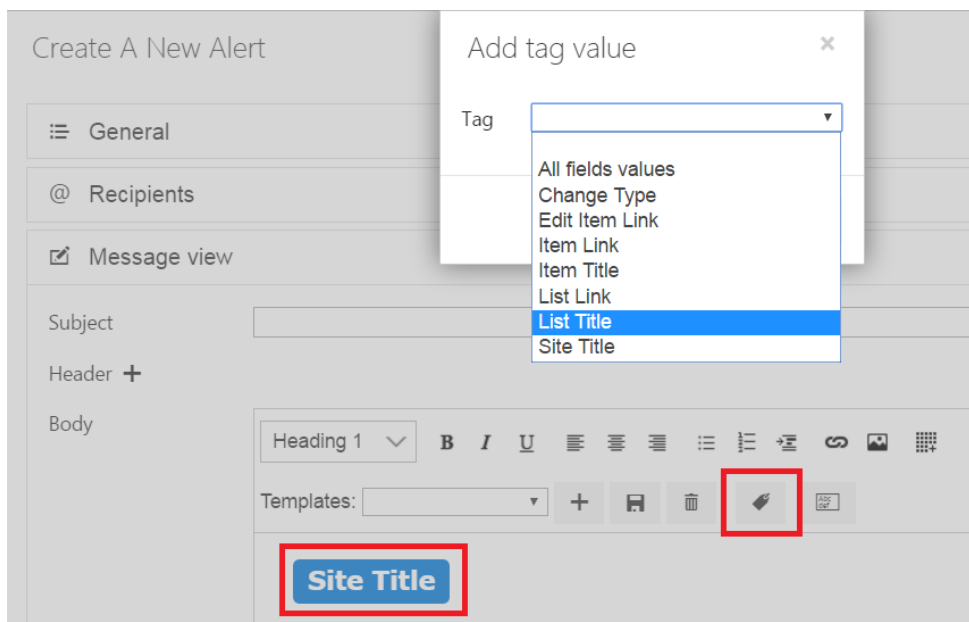
Message View

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.



You can add your own tags by clicking on tag icon.




Click “+” next to Header or Footer to open and customize Header and Footer sections.

Subject

Header —

Paragraph **B** *I* U [List Icons] [Link Icon] [Image Icon] [Table Icon]

Templates: [Dropdown] [Add] [Save] [Delete] [Reset]

 VIRTO SOFTWARE

Body

Format **B** *I* U [List Icons] [Link Icon] [Image Icon] [Table Icon]

Templates: [Dropdown] [Add] [Save] [Delete] [Reset] [PDF Icon]

Item Title - **Change Type**

All fields values

Footer —

Paragraph **B** *I* U [List Icons] [Link Icon] [Image Icon] [Table Icon]

Templates: [Dropdown] [Add] [Save] [Delete] [Reset]

VirtoSoftware - Virto Alert for Sharepoint Online.

This tab allows you to define a message template.

When you create an alert (or reminder) you can choose the checkbox “Is important” and the message will be marked as important one in your email client.

← Back to site Virto Alert for Sharepoint Online

My alerts All alerts Queue

Add Alert Add Reminder

✓ Title

☐ New contract in the list

Create A New Reminder

General

@ Recipients

Message view

Subject Someone deleted the list item

☒ Is important

Header +

Body

(inherited font) (inherited size) Format [Font Color] [Background Color]

B *I* U [List Icons] [Link Icon] [Image Icon] [Table Icon] [Code Icon]

Templates: [Dropdown] [Add] [Save] [Delete] [Reset] [PDF Icon]

The result of message adjustment may look this way:

Subject **Alert**

Header —

Paragraph **B I U** [List Icons] [Link Icon] [Image Icon] [Grid Icon]

Templates: [Dropdown] [Add] [Save] [Delete] [Edit]

The "VirtoSoftware Changes in last 24 hours" email includes:

Body

Paragraph **B I U** [List Icons] [Link Icon] [Image Icon] [Grid Icon]

Templates: [Dropdown] [Add] [Save] [Delete] [Edit] [Image Icon]

Task name field was changed from **Task Name** to **Task Name**

Field	Old value	New value
Task name	Task Name	Task Name


Item Title

Footer —


Paragraph **B I U** [List Icons] [Link Icon] [Image Icon] [Grid Icon]

Templates: [Dropdown] [Add] [Save] [Delete] [Edit]

[VirtoSoftware](#) contact info.

 VIRTO SOFTWARE

Alert recipients receive email messages as follows:

 **Virto Alert** alert@virtoway.com [via](#) sendgrid.me to me ▾


The "VirtoSoftware Changes in last 24 hours" email includes:

Task name field was changed from Old task name to New task name

Field	Old value	New value
Task name	Old task name	New task name

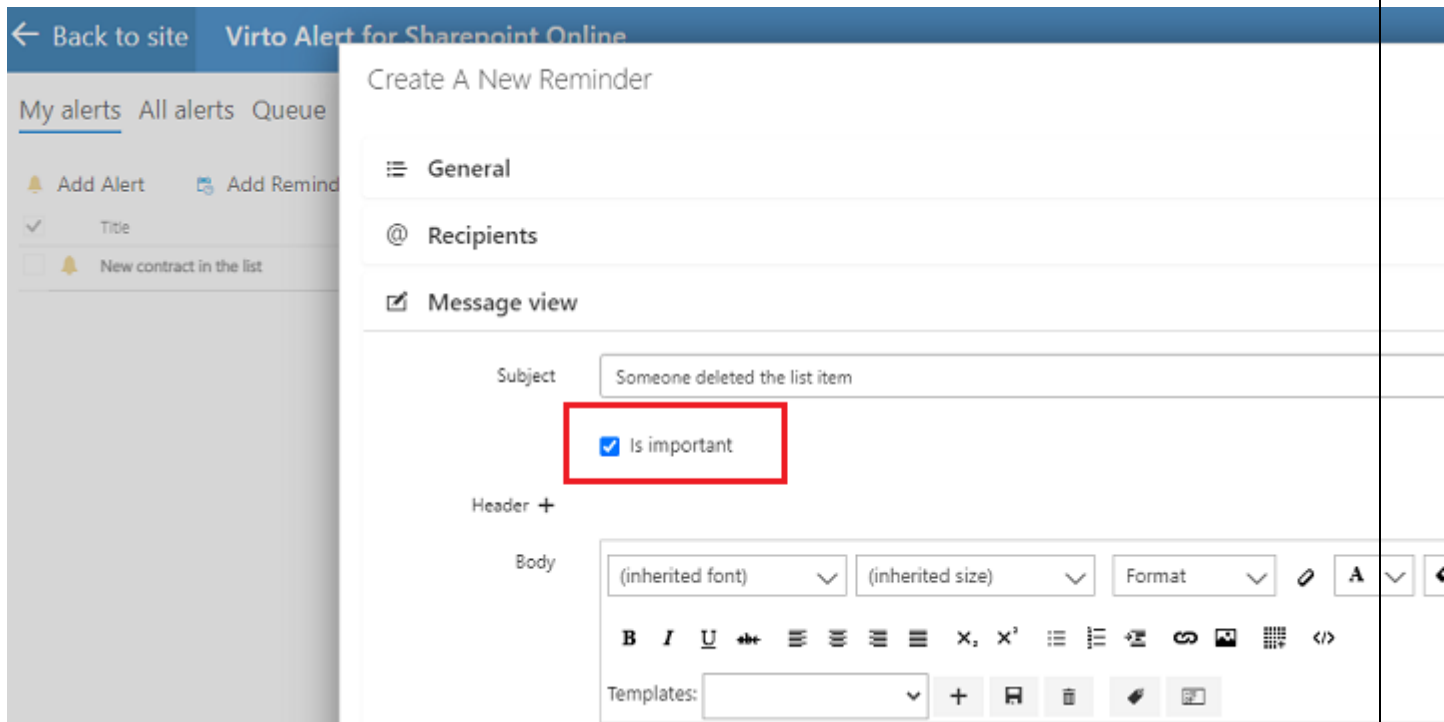
...

[VirtoSoftware](#) contact info.

 VIRTO SOFTWARE

High Importance Marker

When you create an alert or reminder, open the “Message view” section and tick the checkbox “Is important”.



Do not forget to save the alert/reminder to apply the high-importance settings

Complex URLs

First, go to the Alerts app page and click “Edit” next to the alert where you’d like to add variable images.

Virtos Alert for Sharepoint Online							
My alerts All alerts Queue Settings Administrators Subscription							
Alerts: 63/250							
✓	Title	List	Change type	Recipients	Send Alerts for These Cha...	Schedule	Modified
	Meet our new teammate	MK Demo Multiple Lists	New items are added	Me;	Apply to all items	Send notification immedia... 04/16/2021 2:03AM	✓
	New contract in the list	Contracts List	New items are added	Me;	Apply to all items	Send notification immedia... 11/26/2020 1:17AM	✓
	New task has been added	Sales&Marketing Demo	New items are added	Me;	Apply to all items	Send notification immedia... 09/23/2021 11:42AM	
	New Weekly Meeting Alert	Sales&Marketing Demo	All changes	Me;	Apply to all items	Send notification immedia... 07/02/2021 3:43AM	
	Notify New Project	MK Demo Multiple Lists	Reminder	Me;	Apply to all items	Send on date depending ... 04/16/2021 2:01AM	✓
	Overdue task	Sales&Marketing Demo	Existing items are modified	Me;	Apply to all items	Send notification immedia... 08/12/2021 1:29AM	
	New Training Course	Sales&Marketing Demo	New items are added	Me;	Apply to all items	Send notification immedia... 04/25/2022 3:30PM	✓
	Upcoming Courses Remin...	Training Courses Plan	Reminder	Me;	Apply to all items	Send on date depending ... 08/11/2021 4:27AM	
	Weekly Meeting Content	MK Demo Multiple Lists	New items are added	Me;	Apply to all items	Send notification immedia... 04/20/2021 8:20AM	

In the alert window find the “Message View” block. This is where we’re going to add the image.

Edit: New Training Course



General

Recipients

Message view

Subject Training courses of the week

☒ Is important

Header +

Body

(inherited font)

(inherited size)

Paragraph

B*I*U**abc****≡****≡****≡****≡****x₂****x²****≡****≡****≡****≡****≡****≡****≡****≡****≡****≡****≡****≡****≡****≡****≡****≡**

Templates:

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Footer +

☐ Append Item Attachments

Options

Now click the “Add complex link” icon.

Header +

Body

(inherited font)

(inherited size)

Paragraph

B*I*U**abc****≡****≡****≡****≡****≡****x₂****x²****≡****≡****≡****≡****≡****≡****≡****≡****≡****≡****≡****≡****≡****≡****≡****≡****≡**

Templates:

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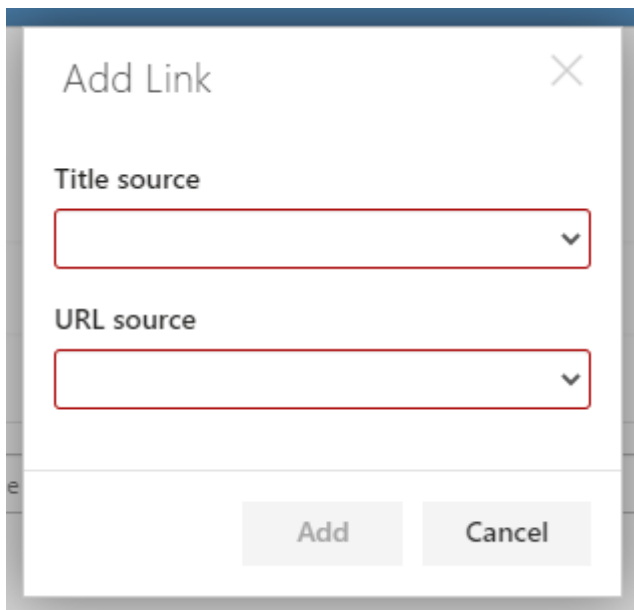
+

+

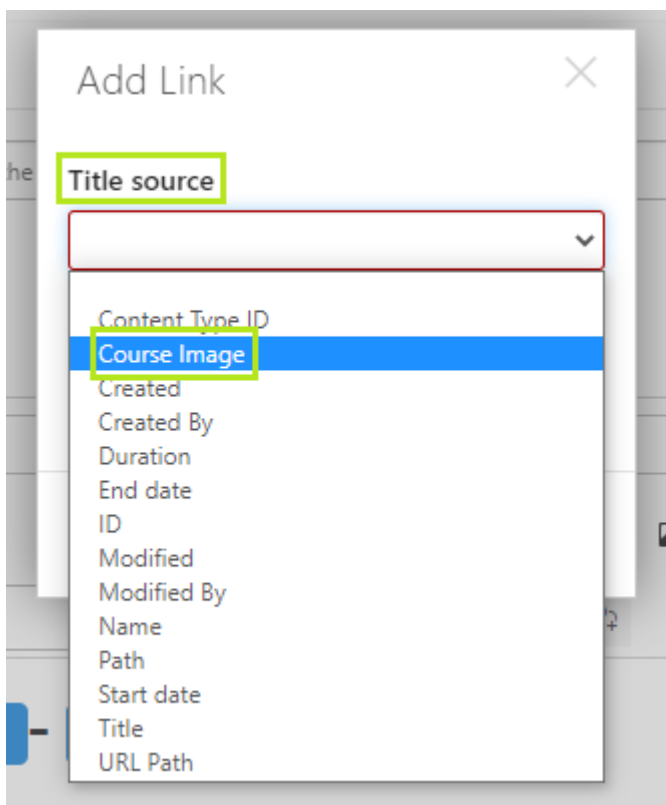
+

Add complex link

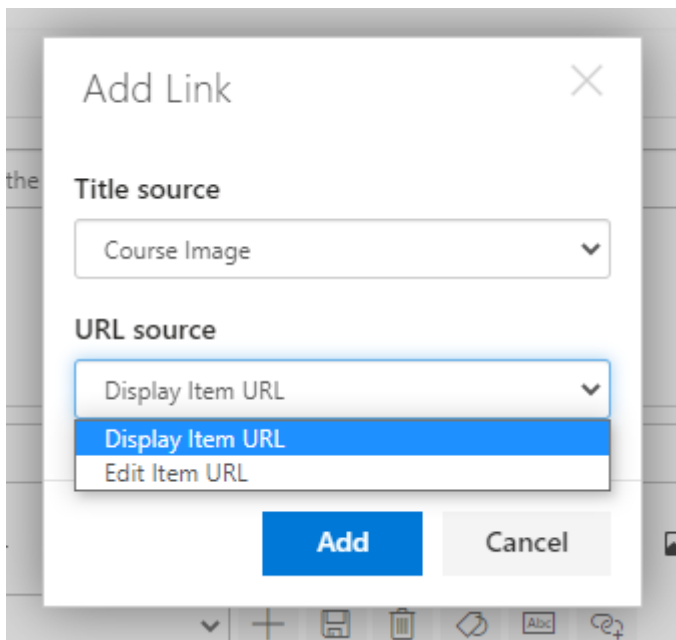
When you click “Add complex link”, you should choose a **Title source** and a **URL source**.



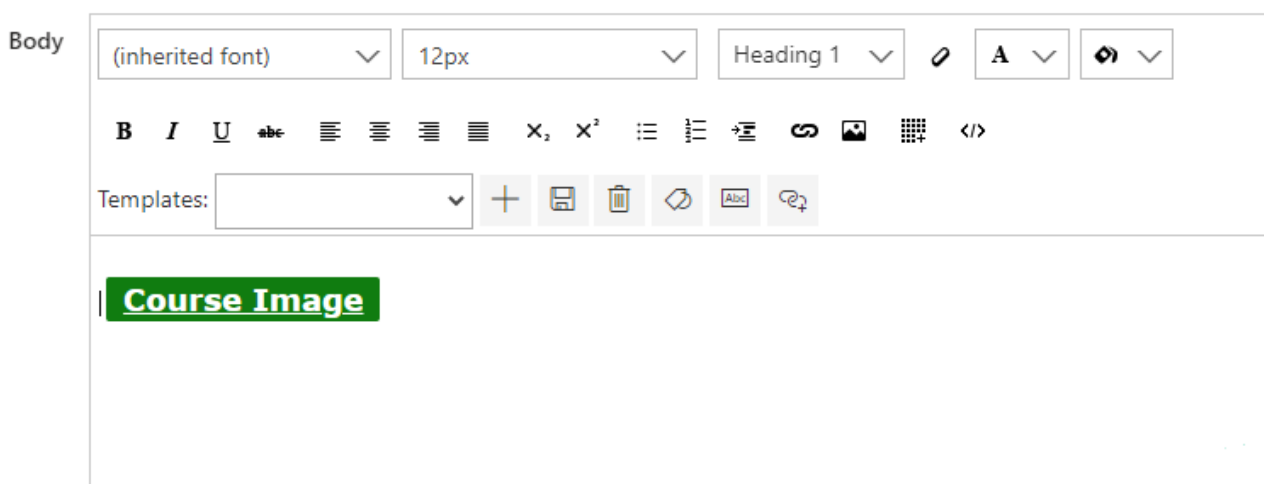
First, the **title source** is where we take the title from. You can choose if from the long list of available fields. We choose “Course image” in our case. This is the Image type field of the source SharePoint list.



Second, the **URL source** is where we link to with a click: display item URL or edit item URL. If a SharePoint item has a URL, it will be added automatically to the alert.



As a result, the alert scheme looks as follows. Certainly, you can adjust it as you wish.



Now imagine someone is adding the image to the source SharePoint list.

VirtoWay Team Site

+ New
Edit
Edit in grid

Training Courses Plan ☆

Start date ▾

...	29/04/2022 10:00
...	04/08/2021 10:00
Security Training	06/08/2021 10:00
Engineering with Microsoft A...	05/08/2021 10:00
at: Interviews	06/08/2021 10:00
a and Tax Avoidance	06/08/2021 10:00
and Interpersonal Skills at ...	13/08/2021 10:00

HR Training

Title *

HR Training

Start date

29/04/2022 10:00


End date

17/08/2021

Duration

2 hours

Image



URL

<https://virtosoftware.com>

The recipients can see the alert in their email client.

Outlook
Search

New message
Delete
Archive
Junk
Sweep
Move to
Categorize
Snooze
Undo

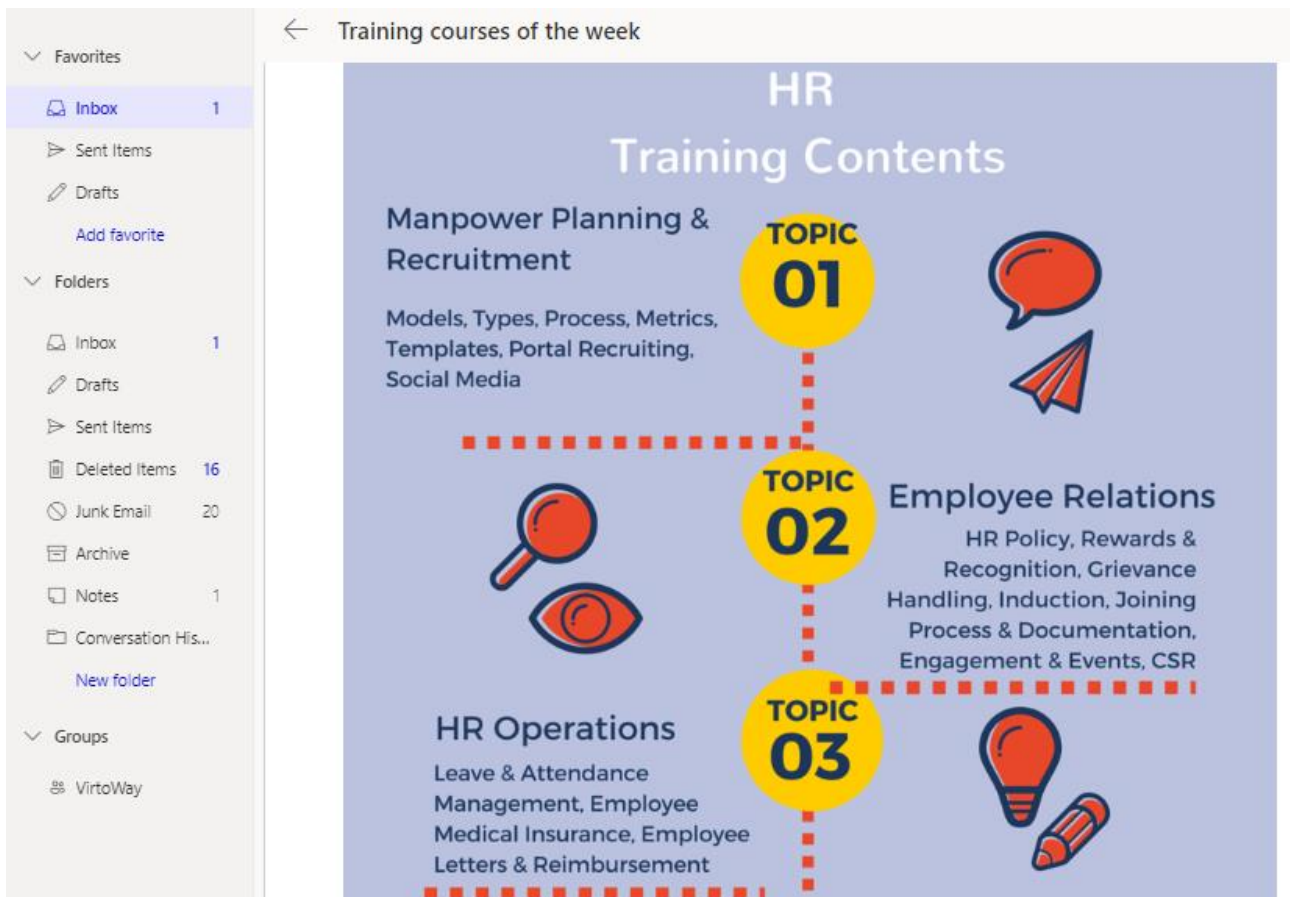
Inbox
1
Sent Items

Inbox ☆

From	Subject
HR News	Training courses of the week Virto alert

Last week

See how the alert looks with the automatically added clickable image. Click on the image will forward to the details.



See the use case in the [blogpost](#).



































You can apply the same method to a **document library** from your SharePoint site. In this case, you should choose Documents as a source. The **Source link** will also offer to navigate to a file. So, the click on the image, file name, or any other chosen title source will link to this file.

Attachments to List Items

In case you want to send alert about list items that contain any attachments, you can include links, pictures, or tables into the alert e-mail.



As an example, e-mail alert with attachments may look this way.

Paragraph ▼ **B** *I* U                                  

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 will receive in alert this field with link to client’s card view form from lookup.

If you select the “Send notification immediately” alert schedule (see next chapter), the option “Append item Attachments” will be available under the footer.

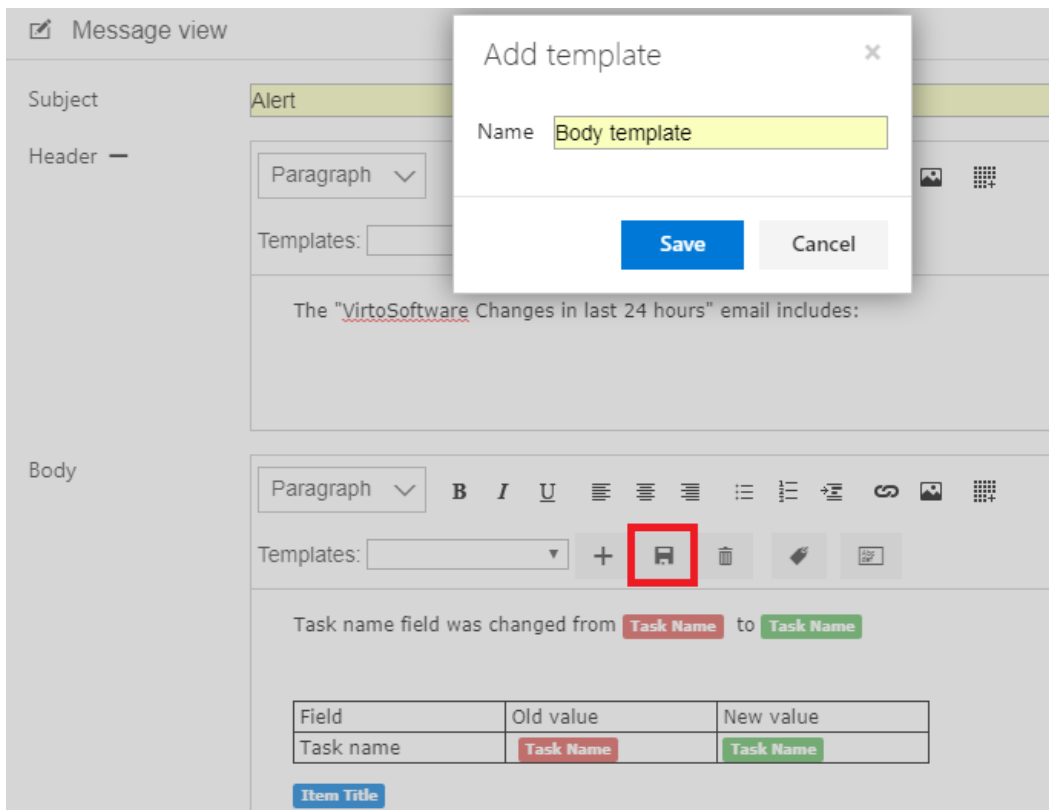
Footer +

☒ Append Item Attachments

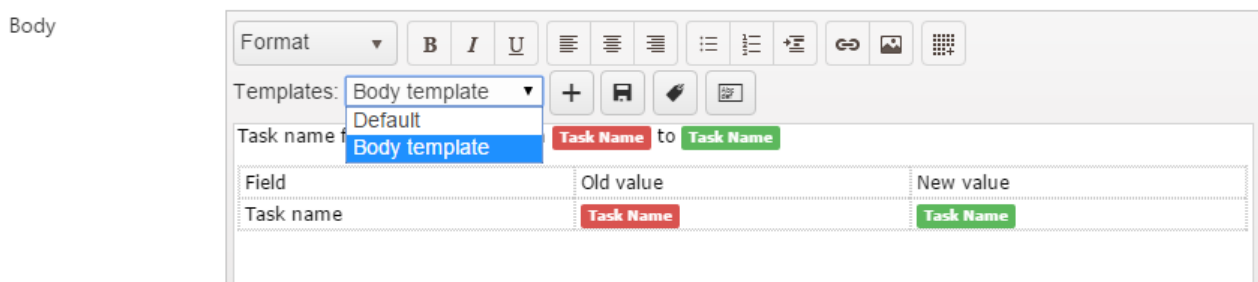
Using this option, you can send alert email with item attachments included.

Saved Message Templates

You can define Header, Body and Footer for the alert and save it as a Template. Just type text for your alert template in the special field and click Save. Then type new template name.



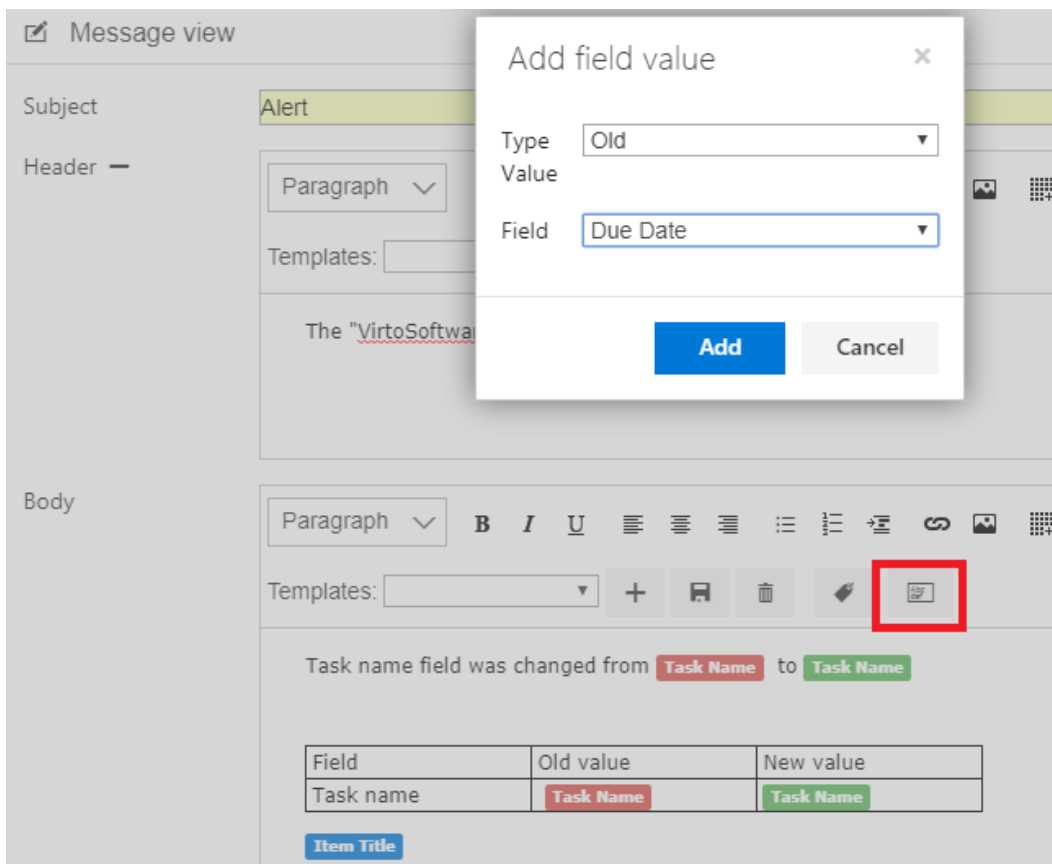
Now you can use saved template for any new alert.



Field values change tracking

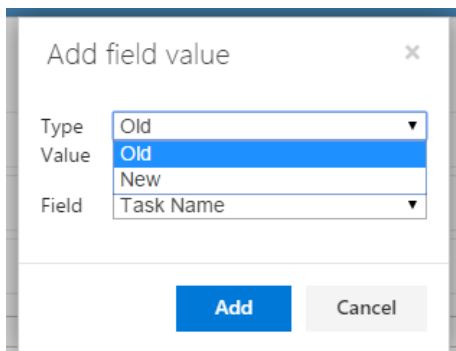
You can define in email body form, which field values will be sent in the created alert.

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

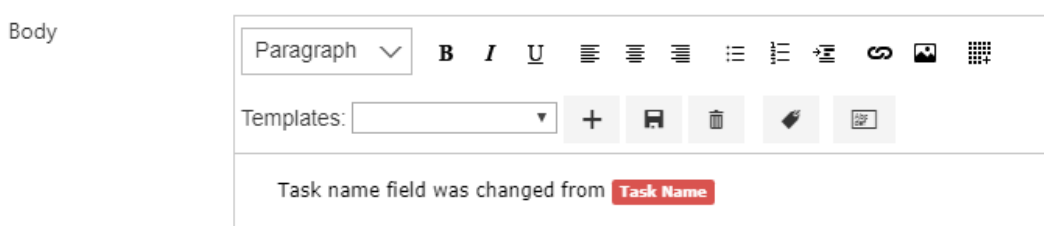


In the following example, we will track “Task name” field changes.

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





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



You can show the “New” task name value field in this alert by choosing “New” value of this field.

Options

Filter items Use condition(s) ▼

	And/Or	Field	Operator	Value
+ X		Title	contains	New
+ X	And	Modified	less or e	10/25/2018  
+ X	Or	Category	contains	Meeting

+ Add new clause

You can add new condition by clicking on “+” button or delete a condition using “X” button.

To track changes in a specific list field, select “Use condition”, choose the required field, and use “has been changed” condition.

Filter items Use condition(s) ▼

	And/Or	Field	Operator	Value
+		Free/Busy	has been	

+ Add new clause

When To Send Alerts Send notification immediately ▼

Operator dropdown menu:

- equals
- not equals
- contains
- not contains
- greater than
- less than
- greater or equals
- less or equals
- has been changed**
- not changed
- is null
- is not null

Save **Cancel**

You can also create a complex condition group. Tick several boxes to select conditions for a group. Then click “And/Or” button to create a group.

Filter items Use condition(s) ▼

	And/Or	Field	Operator	Value
+ X <input checked="" type="checkbox"/>		Free/Busy	has been	
+ X <input checked="" type="checkbox"/>	And	Attendees	contains	Garren Parkins
+ X <input checked="" type="checkbox"/>	And	Attendees	contains	Alexander Siniouguine
+ X <input type="checkbox"/>	Or	Category	equals	Meeting
+ X <input type="checkbox"/>	And	Attendees	contains	Designers

+ Add new clause

Conditions will be grouped.

Filter items Use condition(s) ▼

	And/Or	Field	Operator	Value
+ X <input type="checkbox"/> <input checked="" type="checkbox"/>		Free/Busy	has beer	
+ X <input type="checkbox"/>	And	Attendees	contains	Garren Parkins
+ X <input type="checkbox"/>	And	Attendees	contains	Alexander Siniouguine
+ X <input type="checkbox"/>	Or	Category	equals	Meeting
+ X <input type="checkbox"/>	And	Attendees	contains	Designers

+ Add new clause

You can also create another group and set dependency operator AND/OR (highlighted with pink color) between the groups.

Filter items Use condition(s) ▼

	And/Or	Field	Operator	Value
+ X <input type="checkbox"/> <input checked="" type="checkbox"/>		Free/Busy	has beer	
+ X <input type="checkbox"/>	And	Attendees	contains	Garren Parkins
+ X <input type="checkbox"/>	And	Attendees	contains	Alexander Siniouguine
+ X <input type="checkbox"/> <input checked="" type="checkbox"/>	Or	Category	equals	Meeting
+ X <input type="checkbox"/>	And	Attendees	contains	Designers

+ Add new clause

Click on the condition to ungroup the clause.

Filter items Use condition(s) ▼

	And/Or	Field	Operator	Value
+ X <input type="checkbox"/> <input checked="" type="checkbox"/>		Free/Busy	has beer	
+ X <input type="checkbox"/>	And	Attendees	contains	Garren Parkins
+ X <input type="checkbox"/>	And	Attendees	contains	Alexander Siniouguine
+ X <input type="checkbox"/> <input checked="" type="checkbox"/>	Or	Category	equals	Meeting
+ X <input type="checkbox"/>	And	Attendees	contains	Designers

+ Add new clause

Then define the time of reminding e-mail.

When To Send Alerts

Send notification immediately
Send notification immediately
Send a daily summary
Send a weekly summary
Send on date from a field value

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

If you select “Send a daily summary”, fill out two additional fields from time dropdown lists and check boxes with days when you will to receive a summary.

When To Send Alerts

Send a daily summary ▼

☒ Show latest version only

At (UTC-06:00) Central Time (US & Canada)

09 : 30 ▼

☐ Monday ☐ Saturday

☐ Tuesday ☐ Sunday

☒ Wednesday

☐ Thursday

☐ Friday

If you want to receive only the last status on a field, tick the box “Show latest version only”. Otherwise, when you create a weekly alert and the field was changed 100 times during this week, you will receive the complete report with all changes includes.

This alert will be sent according to settings at 14:30 only within working days.

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

☰ Options

Filter items Apply to all items ▼

When To Send Alerts Send on date depending on a field value ▼

Start Time ▼

The email will be send: Same ▼ date.

☐ Send separate e-mail

☐ Set Time

Same
After
Before
After X number of days specified in field
Before X number of days specified in field
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.

When To Send Alerts

Send on date depending on a field value ▼

Start Time ▼

The email will be send: Same ▼ date.

☒ Send separate e-mail for each item

☒ Set Time

At (UTC-06:00) Central America

16 ▼ : 00 ▼

If you tick the box “Send separate e-mail for each item”, you receive several letters instead of a summary alert.

You can set the exact time for “After” and “Before” options as well.

Options

Filter items

Apply to all items ▼

When To Send Alerts

Send on date depending on a field value ▼

Due Date ▼

The email will be send: Before ▼ 3 days.

At (UTC-05:00) Eastern Time (US & Canada)

14 ▼ : 30 ▼

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.

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.

✓ Title ▼	Choice ▼	Number of days to s...	Due date ▼
1	Enter Choice #1	1	12/9/2016

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 1. 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 “1” in this custom field.

This means, you will receive this alert on the next day after the date in the “Due date” field.

☰ Options

Filter items Apply to all items ▼

When To Send Send on date depending on a field value ▼

Alerts End Time ▼

The email will be send: After X number of days specified in field ▼ Number of days to sen ▼

☒ Set Time

At (UTC-05:00) Eastern Time (US & Canada)

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 before and 1 day before the End Time of event.

☰ Options

Filter items Apply to all items ▼

When To Send Send on date depending on a field value ▼

Alerts End Time ▼

The email will be send: Before X days with daily reminder ▼ 2 days.

☒ Set Time

At (UTC-05:00) Eastern Time (US & Canada)

14 ▼ : 00 ▼

Press "Save" to save the created alert.

How to merge summary alerts in one alert with a table

You can merge several alerts in one report with a single table.

This case can be useful, if you need to create daily report and merge all list's changes in a single table.

Create an alert with daily or weekly summary condition.

When To Send Send a daily summary ▼

Alerts

At 14 ▼ : 30 ▼

☒ Monday ☐ Saturday

☒ Tuesday ☐ Sunday

☒ Wednesday

☒ Thursday

☒ Friday

Options

Filter items Use condition(s) ▼

And/Or	Field	Operator	Value
+ <input type="checkbox"/>	Modified By	user in g	Stakeholders
+ Add new clause			

When To Send Alerts Send notification immediately ▼

Import Export Preview Save

Operator dropdown options:

- equals
- not equals
- contains
- not contains
- greater than
- less than
- greater or equals
- less or equals
- has been changed
- not changed
- is null
- is not null
- begins with
- user in group

With this option, you can apply the condition and send an alert when a user belongs to a certain group. For example, there is a group of document approvers of different levels. When the status of the document changes to “Approve it”, the alert is sent to approvers.

Preview Option

You can make **a preview of the alert or reminder** when you create/edit it. You do not have to make a test alert to see how it will look like for the recipients. Just click “**Preview**” on the bottom of the form before sending and decide if the alert should be changed or looks good enough.

← Back to site Virtos Alert for Sharepoint Online

My alerts

Add Alert

Contract expires

Contract expires

Enabled

Owner user Maria Kosareva

Owner group Select or search an owner groups ...

@ Recipients

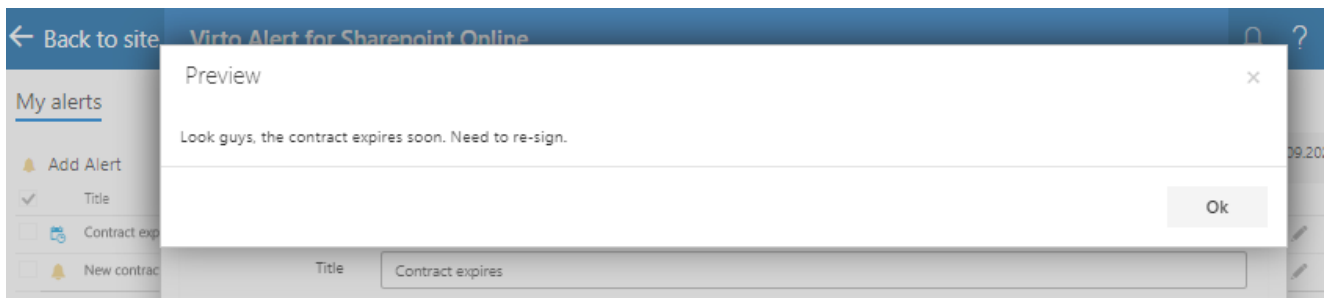
Message view

Options

Import Export **Preview** Save Cancel

Total items: 2

This is how your alert will look.



Filtering and Paging

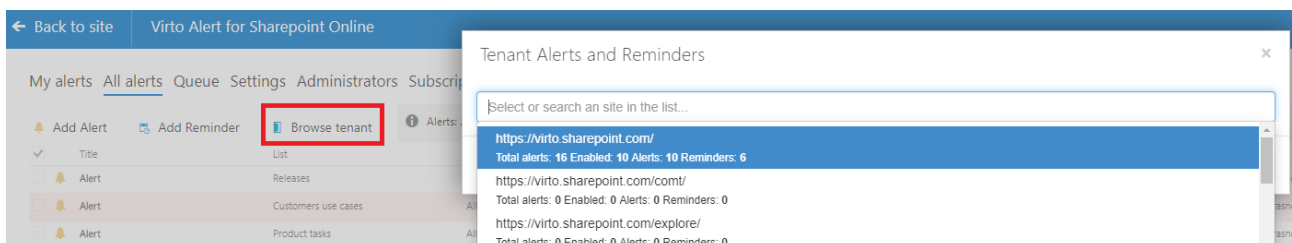
When the list of alerts subscriptions is too large to find a required item, you can use filter by column. For example, you can apply filter by change type.

My alerts All alerts Queue Settings Subscription

🔔 Add Alert
🕒 Add Reminder
📊 Alerts: 10/100

<input checked="" type="checkbox"/>	Title	List	Change type	Recipients
<input type="checkbox"/>	Track list changes	ListTestNewAlerts	All changes	Me;
<input type="checkbox"/>	Alert	testALert	All changes	Me;u2vitbush@gnr
<input type="checkbox"/>	New docs added	testMetaData	New items are added	Me;
<input type="checkbox"/>	New leads	testAlertRepeat	New items are added	Me;
<input type="checkbox"/>	pr	Calendar	Existing items are modified	Me;
<input type="checkbox"/>	Events are modified	CreatedByTest	Existing items are modified	Created-By;
<input type="checkbox"/>	Priority change alert	Calendar	Existing items are modified	Me;
<input type="checkbox"/>	Deleted tasks alert	Tasks	Items are deleted	Me;virtu@virtu.com
<input type="checkbox"/>	Meeting reminder	testNewReminders		Me;
<input type="checkbox"/>	Task reminder	testReminder		Me;

“Browse tenant” menu allows you to search alerts and reminders across your site collection.



You can enable/disable created alerts by checking alert boxes and clicking “Enabled/disabled” button.

My alerts All alerts Queue Settings Subscription

▶ Enable/Disable ✕ Delete ⓘ Alerts: 10/100

<input checked="" type="checkbox"/>	Title	List	Change type ▲
<input type="checkbox"/>	Track list changes	ListTestNewAlerts	All changes
<input checked="" type="checkbox"/>	Alert	testALert	All changes
<input type="checkbox"/>	New docs added	testMetaData	New items are added
<input type="checkbox"/>	New leads	testAlertRepeat	New items are added
<input type="checkbox"/>	pr	Calendar	Existing items are modified
<input checked="" type="checkbox"/>	Events are modified	CreatedByTest	Existing items are modified
<input type="checkbox"/>	Priority change alert	Calendar	Existing items are modified
<input type="checkbox"/>	Deleted tasks alert	Tasks	Items are deleted
<input checked="" type="checkbox"/>	Meeting reminder	testNewReminders	
<input type="checkbox"/>	Task reminder	testReminder	

The current status of an alert or reminder is displayed on the right side. If the status mark is highlighted green, this alert/reminder is enabled. Disabled alerts and reminders are highlighted with red row.

🔔 Check 1	TestAlerts	All changes	Me:	Apply to all items	Send notification imme...	Alex Linn	04/18/2019 5:56AM	▶ ⋮ ✎ ✕
🔔 Condition not changed ...	TestAlerts	All changes	Me:	Use condition(s)	Send on date dependin...	Alex Linn	03/19/2019 2:37AM	▶ ⋮ ✎ ✕
🔔 Daily Alert	TestAlerts	All changes	Me:	Apply to all items	Send a daily summary	Alex Linn	05/07/2019 4:56AM	▶ ⋮ ✎ ✕
🔔 David Test Changes	David Test	All changes	Me:	Use condition(s)	Send notification imme...	Eileen Dempsey	03/19/2019 2:37AM	▶ ⋮ ✎ ✕

Also, you are able to edit or delete created alerts by clicking on the corresponding symbol. The click on Queue icon allows you to view the list of emails that are sent / will be sent according to created alerts' and reminders' schedules.



Queue

Queue view displays list of emails that are sent / will be sent according to created alerts' and reminders' schedules.

My alerts All alerts Queue Settings Administrators Subscription

Select Alert(Reminder): -- All -- Filter items by sent status: ☐ from date: to date:

Alert/Reminder	Subject	List	Emails	Item ID	Send Date
Due date expired 2 days ago	Due Date alert	Dev tasks - All products	mkr@virto.com	8	05/07/2019 2:00PM
Due date expired 2 days ago	Due Date alert	Dev tasks - All products	mkr@virto.com	83	05/07/2019 2:00PM
Daily Alert	Test Daily Alert	TestAlerts	al@virto.com	1	05/08/2019 1:30PM
UPS	ee	TestAlerts	al@virtoway.com	48	
Due date expired 2 days ago	Due Date alert	Dev tasks - All products	mkr@virtoway.com	56	05/07/2019 2:00PM

1 - 25 of 43 items

You can display the queue for selected alert or reminder from the dropdown list.

My alerts All alerts Queue Settings Subscription

Select Alert(Reminder): Meeting reminder

Alert/Reminder
Meeting reminder
Meeting reminder
Meeting reminder
Meeting reminder
Meeting reminder
Meeting reminder

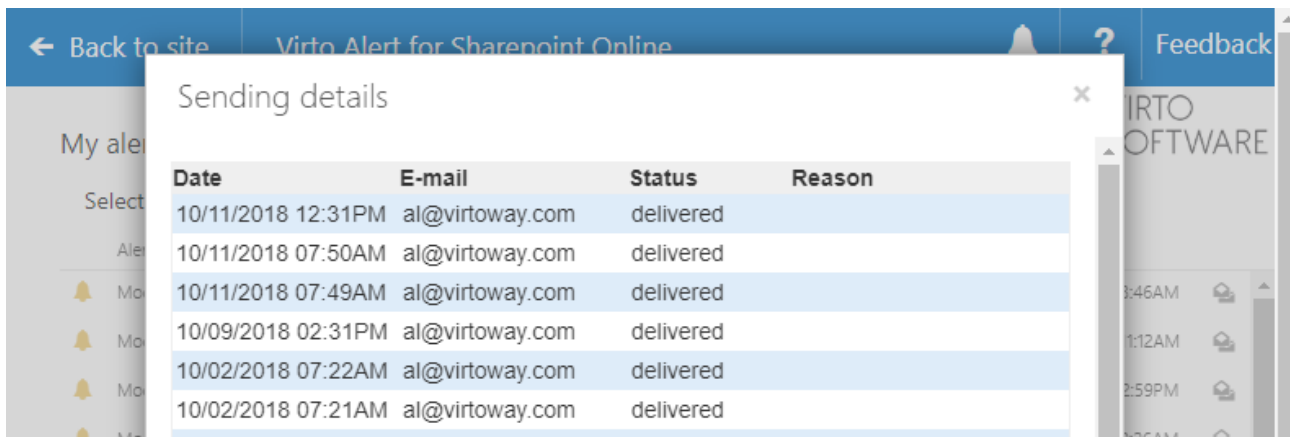
- All
- Meeting reminder
- Track list changes
- New docs added
- Deleted tasks alert
- Task reminder
- New leads
- pr
- Alert
- Events are modified
- Priority change alert

The checkbox “Filter items by sent status” allows you to sort all emails to sent and waiting for sending.

You can also check the email delivery status by clicking on the letter icon.

Alert/Reminder	Subject	List	Emails	Item ID	Send Date
Daily Alert	Test Daily Alert	TestAlerts	al@virtoway.c...	34	
Due date expir...	Due Date alert	Dev tasks - All...	mkr@virtoway...	36	05/07/2019 2:...
Due date expir...	Due Date alert	Dev tasks - All...	mkr@virtoway...	8	05/07/2019 2:...

There you can see the full report about this email, it's statuses and reasons of possible delivery errors.



You can find quick an alert or reminder with the date range filter.

My alerts All alerts Queue Settings Administrators Subscription

Select Alert(Reminder): -- All -- Filter items by sent status: ☐ from date: 5/5/2019 to date: 5/15/2019 Apply

Alert/Reminder	Subject	List	Emails	Send Date
Due date expired 2 days ago	Due Date alert	Dev tasks - All products	mkr@virtoway.com	05/07/2019 2:00PM
Due date expired 2 days ago	Due Date alert	Dev tasks - All products	mkr@virtoway.com	05/07/2019 2:00PM
Due date expired 2 days ago	Due Date alert	Dev tasks - All products	mkr@virtoway.com	05/07/2019 2:00PM
UPS	ee	TestAlerts	al@virtoway.com	
UPS	ee	TestAlerts	al@virtoway.com	
Due date expired 2 days ago	Due Date alert	Dev tasks - All products	mkr@virtoway.com	05/07/2019 2:00PM
Due date expired 2 days ago	Due Date alert	Dev tasks - All products	mkr@virtoway.com	05/07/2019 2:00PM
UPS	ee	TestAlerts	al@virtoway.com	
Due date expired 2 days ago	Due Date alert	Dev tasks - All products	mkr@virtoway.com	05/07/2019 2:00PM
Due date expired 2 days ago	Due Date alert	Dev tasks - All products	mkr@virtoway.com	05/07/2019 2:00PM
Due date expired 2 days ago	Due Date alert	Dev tasks - All products	mkr@virtoway.com	05/07/2019 2:00PM

TUESDAY, MAY 07, 2019

SharePoint Reminders Usage

Virtos Alerts and Reminders app allows you to use email 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 with notification, which can include the fields that need his attention.

Click “Add Reminder” to create a new reminder.

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

Back to site | Virtio Alert for Sharepoint Online

My alerts | **All alerts** | Queue | Settings

Add Alert | Add Reminder

Title	List
<input type="checkbox"/> Meeting reminder	testNewF
<input type="checkbox"/> Track list changes	ListTestN
<input type="checkbox"/> New docs added	testMeta
<input type="checkbox"/> Deleted tasks alert	Tasks
<input type="checkbox"/> Task reminder	testRemi
<input type="checkbox"/> New leads	testAlert
<input type="checkbox"/> pr	Calendar
<input type="checkbox"/> Alert	testALer
<input type="checkbox"/> Events are modified	CreatedB
<input type="checkbox"/> Priority change alert	Calendar

Create A New Reminder

General

List: Virtio Calendar Events List

Title: Meeting reminder

☒ Enabled

@ Recipients

☒ Message view

Options

Save Cancel

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

You have to assign the list of recipients who will receive this reminder. External email addresses are supported as well.

Create A New Reminder

General

@ Recipients

Recipients: Me

☒ Message view

Options

Message view can be customized with field values of the list. The reminder email can be adjusted in the same way as the alert email.

Message view

Subject:

Header: **+**

Body:

Paragraph ▼ **B** *I* U

Templates: ▼ + 📁 🗑️ ✍️ 📄

Dear me,
You have a meeting Title at Start Time

Location

Description

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

Apply to all items

Apply to items in the following view

Use condition(s)

When To Send Alerts

Save

Cancel

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

Filter items

Use condition(s)

And/Or

Field

Operator

Value

+

×

□

Title

contains

meeting

+

×

□

And

Discussion Subject

equals

lead

+

Add new clause

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.

When To Send Reminder

Start Time

The email will be send: Before 1 days.

Save

Cancel

You can also send daily, weekly, and monthly reminders.

When To Send Alerts

Send a weekly summary

Send a daily summary

Send a weekly summary

Send a monthly summary

Send on date depending on a field value

The schedule customization is similar to alert schedule customization.

When To Send Alerts Send a monthly summary ▼

☒ Send separate e-mail for each item

Send every months

☒ January
 ☐ May
 ☐ September

☐ February
 ☐ June
 ☐ October

☐ March
 ☐ July
 ☐ November

☐ April
 ☐ August
 ☐ December

Send on

☐ day 1


☒ the First Monday


At (UTC-06:00) Central America

16 : 10

Note: reminders for recurrent events are supported as well.

Next day meeting reminder 📧 Inbox x

 TEST via sendgrid.me
to me ▼

 VIRTO SOFTWARE

Dear me,
You have a Meeting with an important client at 2016-11-28 08:00:00

Head office

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

My alerts All alerts Settings Subscription

🔔 Add Alert
🔔 Add Reminder
📢 Alerts: 42/Unlimited

<input checked="" type="checkbox"/>	Title ▲	List
<input type="checkbox"/>	Deleted pics alert	Images
<input type="checkbox"/>	Events are modified	Virto Calendar Events List
<input type="checkbox"/>	Meeting with clients reminder	Virto Calendar Meetings List

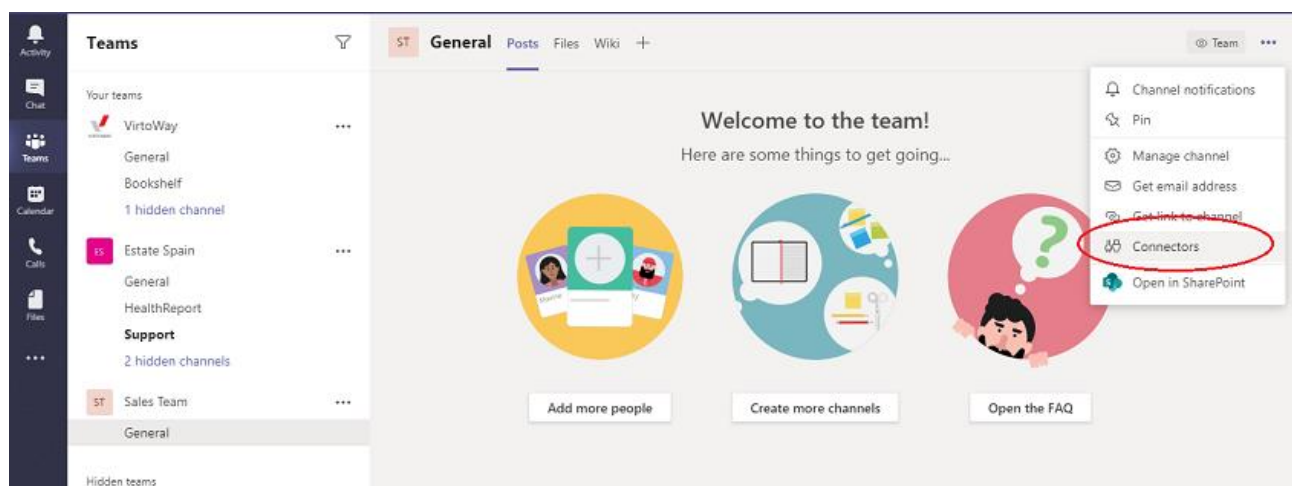
How to Connect Alerts from SharePoint to Teams

Using Incoming Webhooks is one more simple way to post messages from apps into Teams. Creating an Incoming Webhook gives you a unique URL that you use when creating an alert.

In the case below, you're working on a SharePoint list and need to know instantly when anybody on your team creates a new item list. For example, your list contains all the contracts to be signed and attached. And you would like to receive an alert about all the new contracts added.

+ New Quick edit Export to Excel File Uploader by Verto PowerApps Automate			
Contracts List			
Title ▾	Signing Date ▾	Expiration Date ▾	Contacts ▾
P&D	5/5/2020	5/5/2021	Tomas Burn +44 493 07 88
CH International	5/8/2020	5/8/2021	Christine Lee +44 490 44 44
Just One Enterprises	2/10/2020	2/10/2021	Phil Collins +44 490 00 10
Shines Ltd	5/14/2019	5/14/2020	Arthur Lutz +44 400 00 00
Gesund GmbH	5/14/2019	5/14/2020	Sandra Berger +49 876 32 32

Open the settings of your team in Teams that will receive the alerts and click "Connectors".



Find "Incoming Webhook" in the list of connectors and click "Add".

Connectors for "General" channel in "Sales Team" team



Keep your group current with content and updates from other services.

All
Sort by: Popularity ▾

MANAGE
Configured
My Accounts

CATEGORY
All
Analytics
CRM
Customer Support
Developer Tools
HR

Connectors for your team

Forms
Easily create surveys, quizzes, and polls.

Configure

All connectors

Azure DevOps
Collaborate on and manage software projects online.

Add

RSS
Get RSS feeds for your group.

Add

Incoming Webhook
Send data from a service to your Office 365 group in real time.

Add

Fire Cloud

Add

Name the webhook and save it.

Connectors for "General" channel in "Sales Team" team



To set up an Incoming Webhook, provide a name and select Create. *

Customize the image to associate with the data from this Incoming Webhook.

Upload Image



Default Image

Create

Cancel

Then copy the URL below to the clipboard. This URL will be used in Virto SharePoint Alert

Connectors for "General" channel in "Sales Team" team



Copy the URL below to save it to the clipboard, then select Save. You'll need this URL when you go to the service that you want to send data to your group.

<https://outlook.office.com/webhook/ba5t>



Done

Remove

Note: If you're a software developer and want to learn more about sending data to Office 365 using Incoming Webhook, see [Get started with Office 365 Connector Cards](#).

Open your SharePoint site, navigate to Alerts page, and click "Add alert".

← Back to site

Virto Alert for Sharepoint Online

My alerts All alerts Queue Settings Administrators Subscription

Add Alert



Add Reminder



Browse tenant



Alerts: 15/250



Title

List

Change type

Recipients

Select your SharePoint list with contracts and adjust an alert as you require.

Create A New Alert



General

List

Contracts List

Change Type

New items are added

Title

New contract is added

☒ Enabled

Owner user

Maria Kors

Owner group

Select or search an owner groups ...

@ Recipients

☒ Message view

Options

Import
Export

Save

Cancel

And here is the key — open the “Recipients” block and find “**MS Teams Webhook URL**”. Now just paste the webhook URL you copied before.

@ Recipients

To:

Me x Type a emails or title of user fields (ex.: Created By, Modified By)

CC:

Type a emails or title of user fields (ex.: Created By, Modified By)

BCC:

Type a emails or title of user fields (ex.: Created By, Modified By)

MS Teams Webhook URL:

https://outlook.office.com/webhook/ba567109-7520-4701-959a-d86933839459@bc03e660-5e3a-45c4-bf5c-b75489f78923/Ink

Microsoft Teams Incoming Webhook Connector URL

Adjust the alert as you wish (add title, body, define when it will be sent, etc.) and save it.

[← Back to site](#)
Virto Alert for Sharepoint Online

[My alerts](#)
[All alerts](#)
[Queue](#)
[Settings](#)
[Administrators](#)
[Subscription](#)

Add Alert
 Add Reminder
 Browse tenant
 Alerts: 17/250

<input checked="" type="checkbox"/>	Title	List	Change type
<input type="checkbox"/>	New contract is added	Contracts List	New items are added

Now when a new contract (list item) is added by your colleagues, the alert will be sent directly to the Team you've chosen.

The screenshot shows a Microsoft Teams interface. On the left, the 'Teams' sidebar lists 'Estate' and 'Sales Team'. The 'Sales Team' is selected, and the 'General' channel is active. The main chat area shows a message from 'Maria Kors' stating 'has added Incoming Webhook to the team.' Below this, there are two alert messages from 'Alerts from Contracts List'. The first alert, dated '10:24 AM', states 'Maria Kors has set up a connection to Incoming Webhook so group members will be notified for this configuration with name Alerts from Contracts List'. The second alert, dated '10:48 AM', has the title 'New contract is added' and the body text 'Hey guys! We have a new contract. Take a look please.' Both alerts have a 'Reply' button below them.