

Add a new button to a new flyout

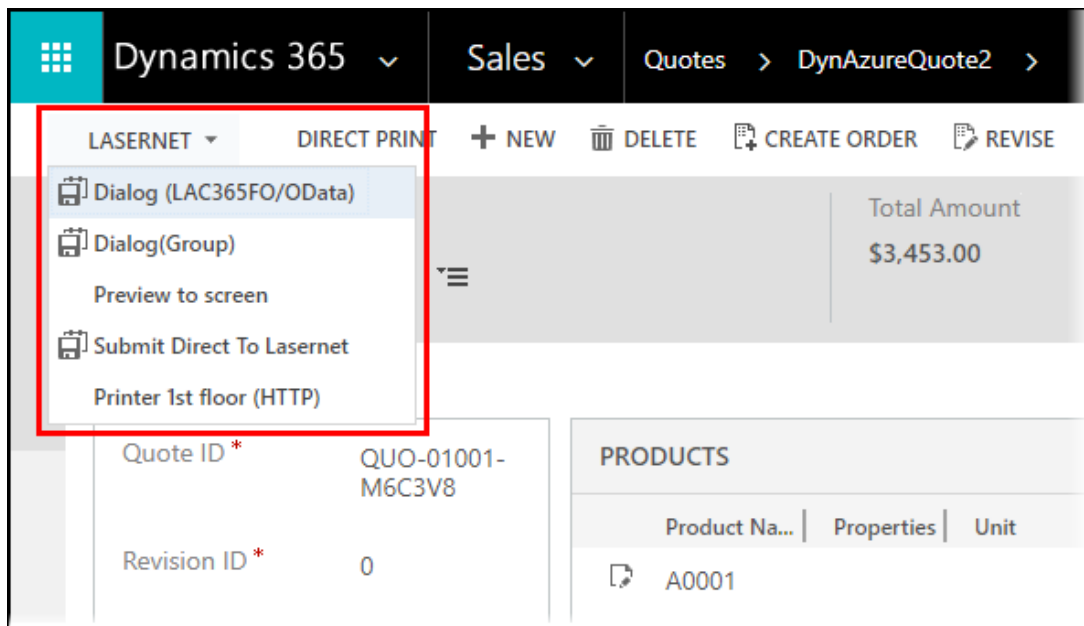
- 2021-08-25 - Comments (0) - D365 CE Configuration

Lasernet for Dynamics 365

This article describes how to add and configure a flyout in Microsoft Dynamics 365 Customer Engagement. A flyout is a CRM control that enables you to group together actions such as print, preview or email. Once you add this control, it shows in Microsoft Dynamics 365 Customer Engagement. Clicking the flyout shows a list of actions, such as:

- OData Dialogs
- OData Direct Submit
- HTTP Methods

The actions stated above can only be used when Microsoft Dynamics 365 Finance and Operations is connected to Microsoft Dynamics 365 Customer Engagement. OData Dialogs is an action button to open a print dialog. Here you can choose a printer, a number of copies, etc. Data is received from the Microsoft Dynamics 365 Customer Engagement entities. The button is used when Microsoft Dynamics 365 Customer Engagement is not connected to Microsoft Dynamics 365 Finance and Operations, or if you want to use a logic app. OData Direct Submit is an action button configured within Microsoft Dynamics 365 Customer Engagement. It has a predefined destination configured in Lasernet Connector for Dynamics 365 Finance and Operations. Data is received from the Microsoft Dynamics 365 Customer Engagement entities. HTTP Methods is an action button that allows executing an API Post triggering a logic app.



Prerequisites

To execute the steps listed below, you require:

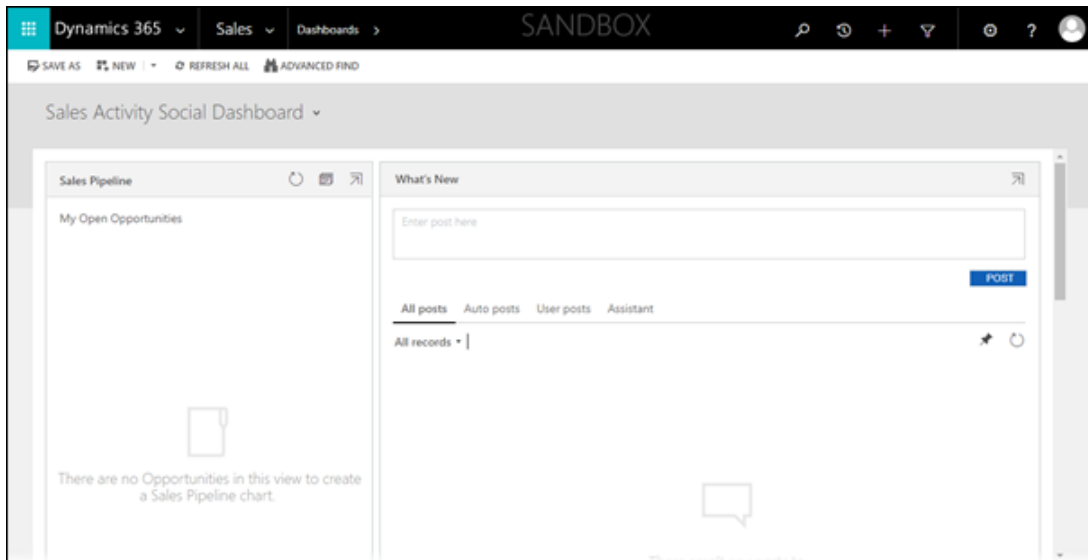
- Administrative access to the Microsoft Dynamics 365 Customer Engagement environment.
- An endpoint address which complies with the environment to send the call from Microsoft Dynamics 365 Customer Engagement.

An endpoint address can be either an entry point for the logic app or a corresponding URL in Microsoft Dynamics 365 Finance and Operations.

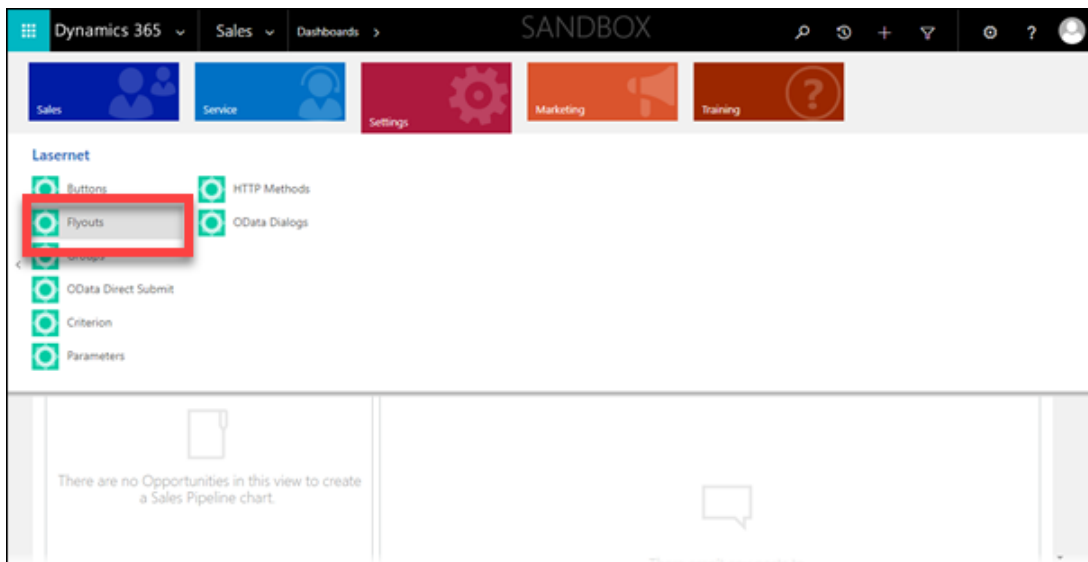
Steps

Please follow the step-by-step instructions below:

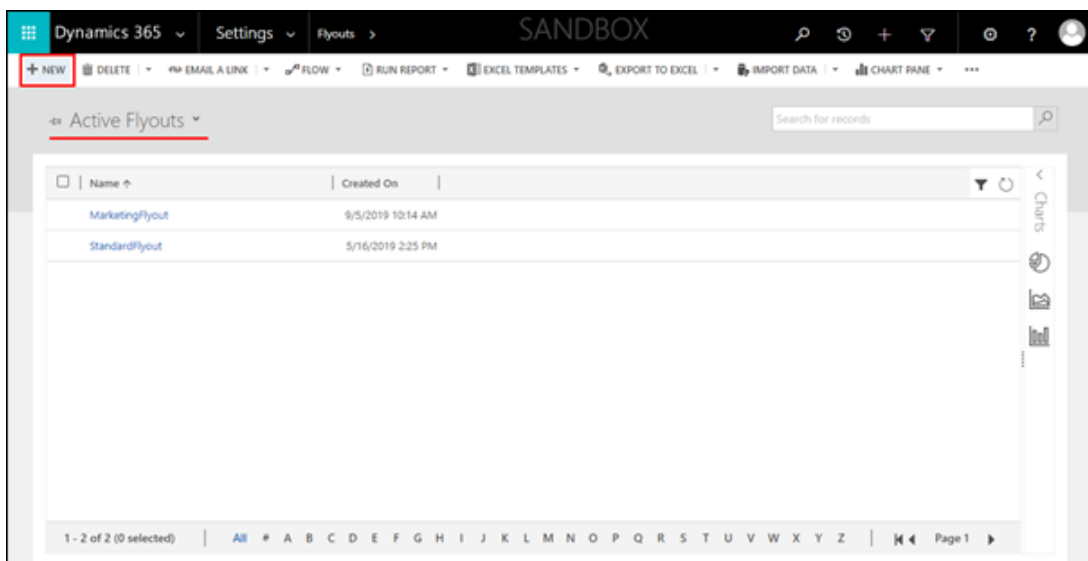
1. Log in to the Microsoft Dynamics 365 Customer Engagement environment where Lasernet Connector for Microsoft Dynamics 365 Customer Engagement has been deployed as a managed solution.



2. On the **Sales** menu, click the down-pointed arrow to show the navigation menu. Under the **Settings** flyout, locate the **Lasernet** list, and then click **Flyouts**.

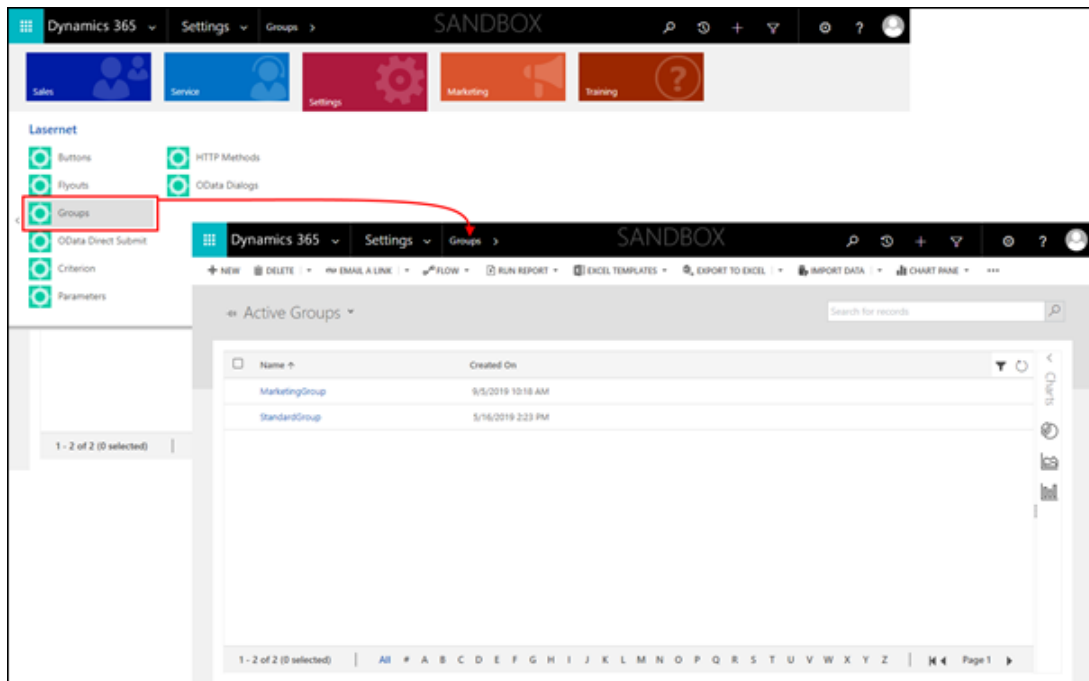


3. On the *Flyouts* page that opens, click the **New** button to create a new flyout.

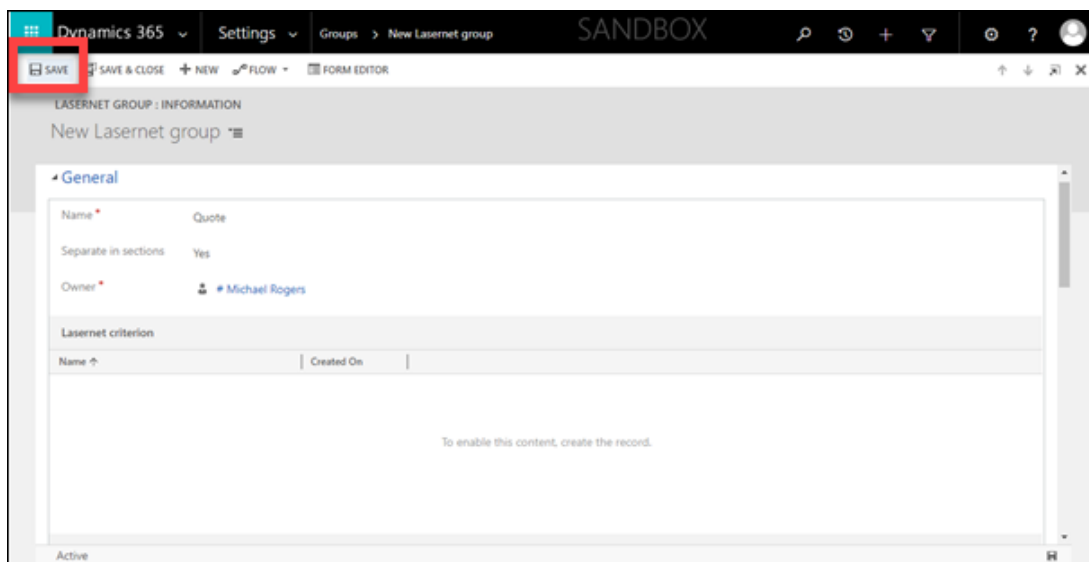


4. Enter a descriptive name for the flyout you are adding, and then click **Save**.
5. On the *Sales* menu, click the down-pointed arrow to show the navigation menu and under the *Settings* flyout, locate the Lasernetet list, and then click **Groups**.

As a result, the **Groups** page opens.

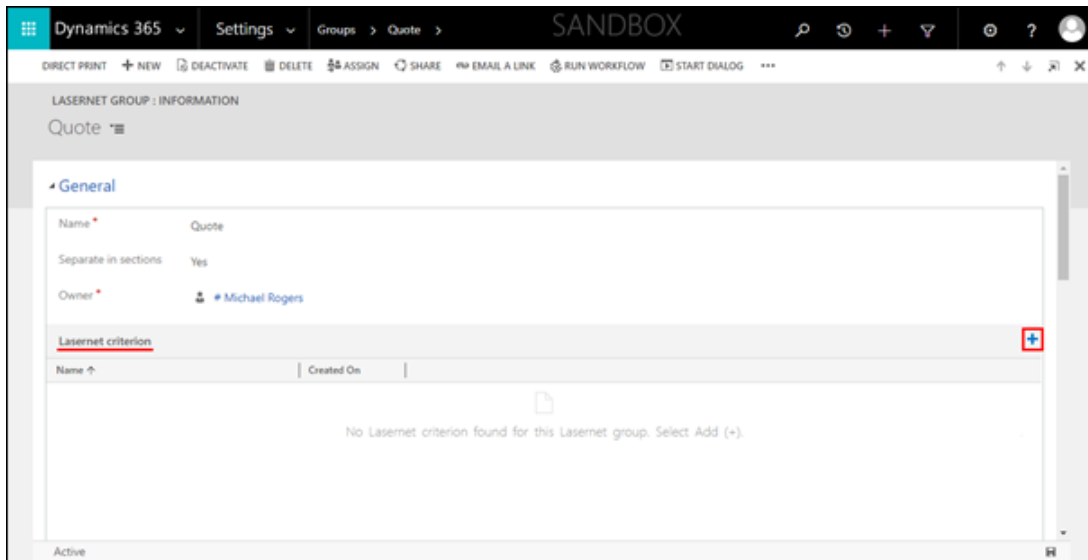


6. Click the **New** button to add a new group.
7. Enter a descriptive name, and then click **Save**.



8. Scroll down to the Lasernet criterion section and click the **plus** sign to add criterion/criteria to the group.

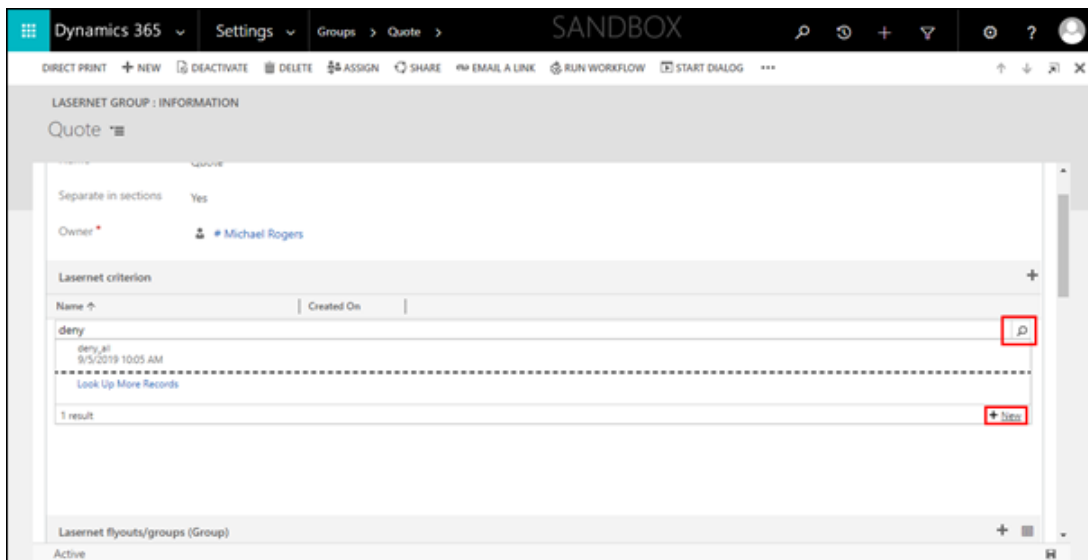
Criteria display rules for your group. A criterion allows either displaying or hiding your group on different entity pages.



Use the **Search** functionality to find the required criteria. To this end, type a name in the search text box, and then click the magnifying glass icon, or just click the magnifying glass icon without typing the criterion name. Once the list is populated with available criteria, click the criterion you need to add it.

Select at least the **deny_all** criterion to prevent the group from showing up for every entity in Microsoft Dynamics 365 Customer Engagement, except for the one for which you create a flyout. If the **deny_all** criterion has not been created yet, please make sure to create the one (see the steps listed below).

If this is a new installation, no criteria are present in the system, and thus, you shall create them first by following the instructions listed below. To this end, click the **New** button while searching for a criterion.



As a result, the *New Lasernet Criteria* window opens. In the window, define a name, a criterion type and a primary entity type value. Once you are done, click the **Save & Close** button.

To find out what entity types are available in the system, you need to access the Entities list. To this end, on the Sales menu, click the down-pointed arrow to show the navigation menu. Under the Settings flyout, locate the *Customization* list, and then click **Customizations**. On the Customization page that opens, click **Customize the system**. As a result, a new window opens. To access the Entities list, on the Default Solution pane, expand the **Entities** component.

The screenshot shows the Dynamics 365 interface for creating a new Liveness criteria. The breadcrumb trail is 'Settings > Criterion > New Liveness criteria'. The page title is 'LASERNET CRITERIA : INFORMATION' and the sub-page title is 'New Liveness criteria'. The 'General' section is expanded, showing the following fields:

- Name: deny_all
- Criteria Type: Deny
- Primary Entity type: (empty)
- Selected Entity type: (empty)
- Owner: Michael Rogers

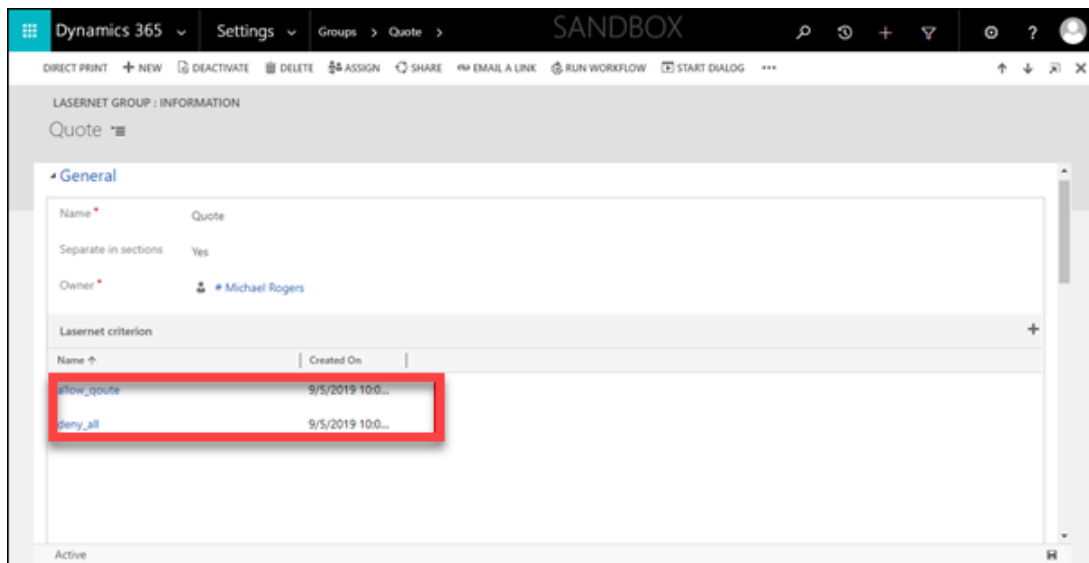
Below the fields is a table for 'Liveness flyouts' with columns 'Name' and 'Created On'. The table is currently empty. At the bottom of the form, there is a message: 'To enable this content, create the record.' The status at the bottom left is 'Active'.

The screenshot shows the Dynamics 365 interface for creating a new Liveness criteria. The breadcrumb trail is 'Settings > Criterion > New Liveness criteria'. The page title is 'LASERNET CRITERIA : INFORMATION' and the sub-page title is 'New Liveness criteria'. The 'General' section is expanded, showing the following fields:

- Name: allow_order
- Criteria Type: Allow
- Primary Entity type: order
- Selected Entity type: (empty)
- Owner: Michael Rogers

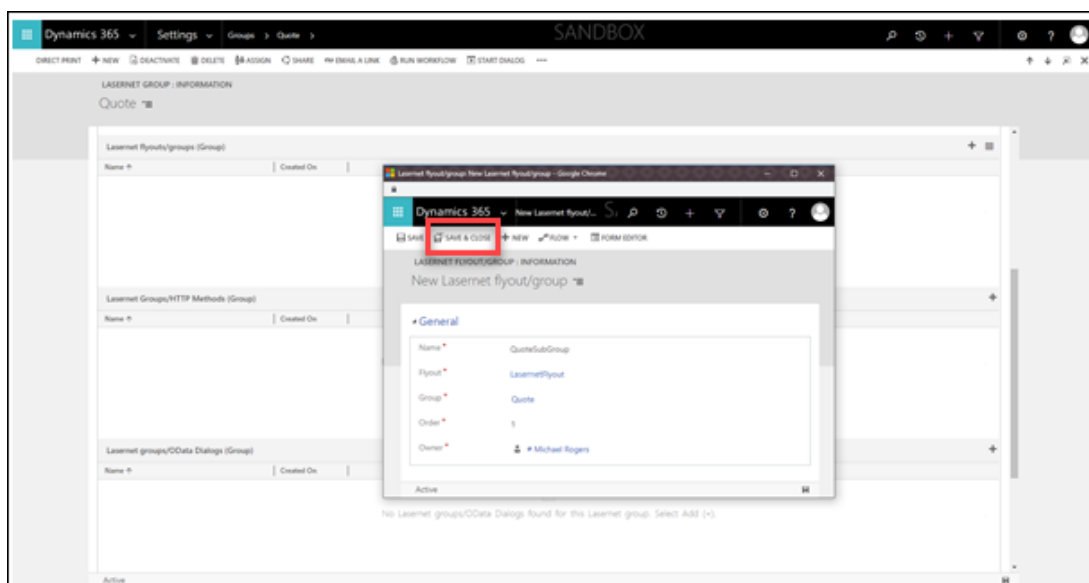
Below the fields is a table for 'Liveness flyouts' with columns 'Name' and 'Created On'. The table is currently empty. At the bottom of the form, there is a message: 'To enable this content, create the record.' The status at the bottom left is 'Active'.

9. Go back to the group and verify that you have added all the required criteria. On the screenshot below, these are **deny_all** and **allow_quote**. By defining criteria, you add a group to the entity you require.



10. Scroll down to the *Lasernet flyout/groups* section, and add a new group by clicking the **plus** sign to link the group to the required flyout.

In the *New Lasernet flyout/group* window that opens, fill in the required fields, and then click the **Save & Close** button.



11. In addition, you can add the *HTTP method* record as well as the *OData Dialog* and *OData Direct Submit* records by clicking the **plus** sign in the corresponding section of the group.

In the *New Lasernet group* window that opens, search for the required record and select it. If you cannot locate the required record or no records are available in the system, it is possible to add a new one. To this end, click the **New** button while searching for a record (HTTP Method, OData Dialog or OData Direct Submit).

Otherwise, you can add a new record (HTTP Method, OData Dialog or OData Direct Submit)

to the system in advance:

- Click [here](#) to find step-by-step instructions on how to add a new **OData Dialog** record.
- Click [here](#) to find step-by-step instructions on how to add a new **HTTP Method** record.
- Click [here](#) to find step-by-step instructions on how to add a new **OData Direct Submit** record.

12. Once you are done, click the **Save** icon in the bottom right-hand corner of the window to save all the changes you have done.

As a result, the flyout and all the actions you have defined are now available for the configured entity.

Related Content

- [Creating a flyout menu](#)