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Creating an OData Direct Submit

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Lasernet for Dynamics 365

The article provides step-by-step instructions on how to create a new OData Direct Submit record as a part of the Lasernet Connector configuration within Microsoft Dynamics 365 Customer Engagement (D365 CE).

OData Direct Submit is an action button configured within D365. It has a predefined destination configured in Lasernet Connector for Dynamics 365 Finance and Operations (D365 FO). Data is received from the D365 CE entities.

- 1. Sign into your Microsoft Dynamics 365 Customer Engagement system.
- 2. On the Sales menu, click the drop-down menu to show the navigation menu flyout, and then under the Settings flyout, click **OData Direct Submit** in the Lasernet list.

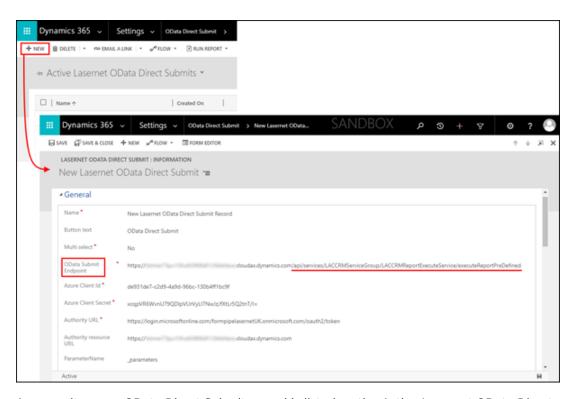


The Active Lasernet OData Direct Submits page is displayed. Follow the steps listed below to create a new OData Direct Submit record.

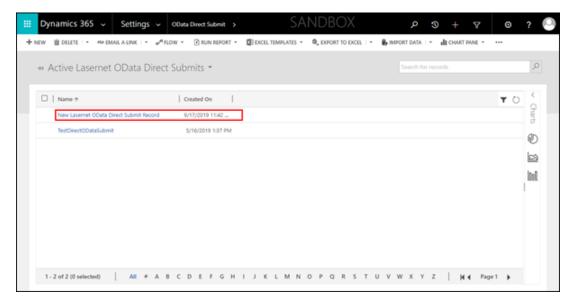
- 3. On the Active Lasernet OData Direct Submits page, click the **NEW** button.
- 4. Fill in all the required fields. and then click the **Save** icon.

In the *OData Submit Endpoint* text box, enter the URL which is composed of the Microsoft Dynamics 365 Finance and Operations environment URL and the API interface to your Lasernet service. The latter is a fixed part. Here is an example of this fixed part for the *OData Submit Endpoint* text box

value: .../api/services/LACCRMServiceGroup/LACCRMReportExecuteService/executeReportPreDefined



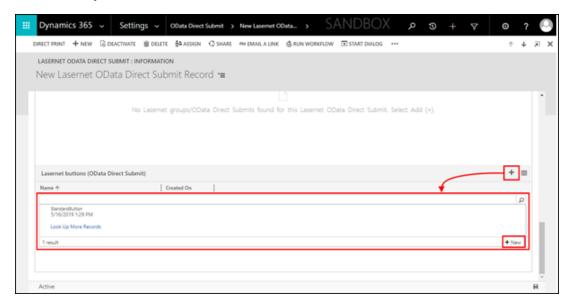
As a result, a new OData Direct Submit record is listed on the *Active Lasernet OData Direct Submits* page.



5. In the Active Lasernet OData Direct Submits list, click the OData Direct Submit record

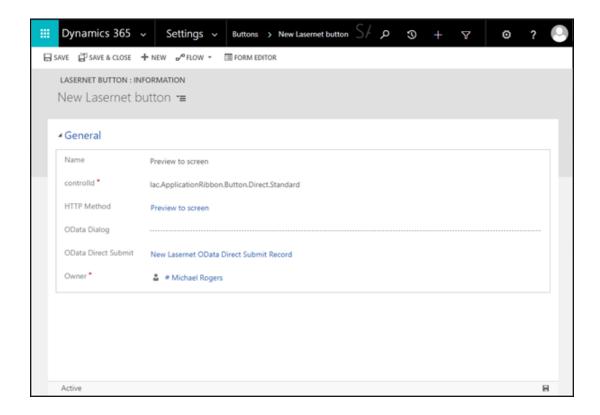
you have just added. The OData Direct Submit page opens for editing.

- 6. In the Lasernet Groups/OData Direct Submit (OData Direct Submit) section, click a **plus** icon to add a group/OData Direct Submit record.
- 7. Use the **Search** functionality to find the required record. 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 record name. Once the list is populated with the available record(s), click the one you need to add it.



If no records are present in the system, you can create a new one(s) first by following the instructions listed below. Click the **New** button while searching for a record.

As a result, the *New Lasernet Button* window opens. In the window, fill in the required fields to define an action to be performed when clicking the button, and then click the **Save & Close** button.



In addition, you can add a new OData Direct Submit record when adding a new group or editing the existing one. Please see step 11 in the <u>Configuration | Lasernet Connector for Dynamics 365 CE | Add a new button to a new flyout article.</u>