

How do I Format the Email Subject and Body from Lasename Connector?

- 2023-11-30 - Comments (0) - Lasename FO Connector FAQs

Lasename for Dynamics 365

The purpose of this article is to provide a guide on how to use the Lasename connector to format an email subject and body which dynamically uses report information from Dynamics 365. This allows users to create generic email subjects and bodies that will dynamically populate relevant data. This process can be used in Destinations as well as default destinations. This article provides examples from a Report's default destinations setup but can be applied to Destinations if you wish to use Predefined destinations.

1. Navigate to **Lasename > Common > Reports** and select your report from the list.
2. On the right-hand side, scroll down to the Destination defaults fast tab (Destinations on the action pane for predefined destination setup) and on the Subject of the email, select the **ellipses** button.

Email address

Cc

Bcc

Subject

On dialog

Body

3. Create a new record and select a **Language**. The Lasernet connector will dynamically select the correct translation of the Email subject and body which corresponds to the record being sent.

4. Type in your desired subject and body.

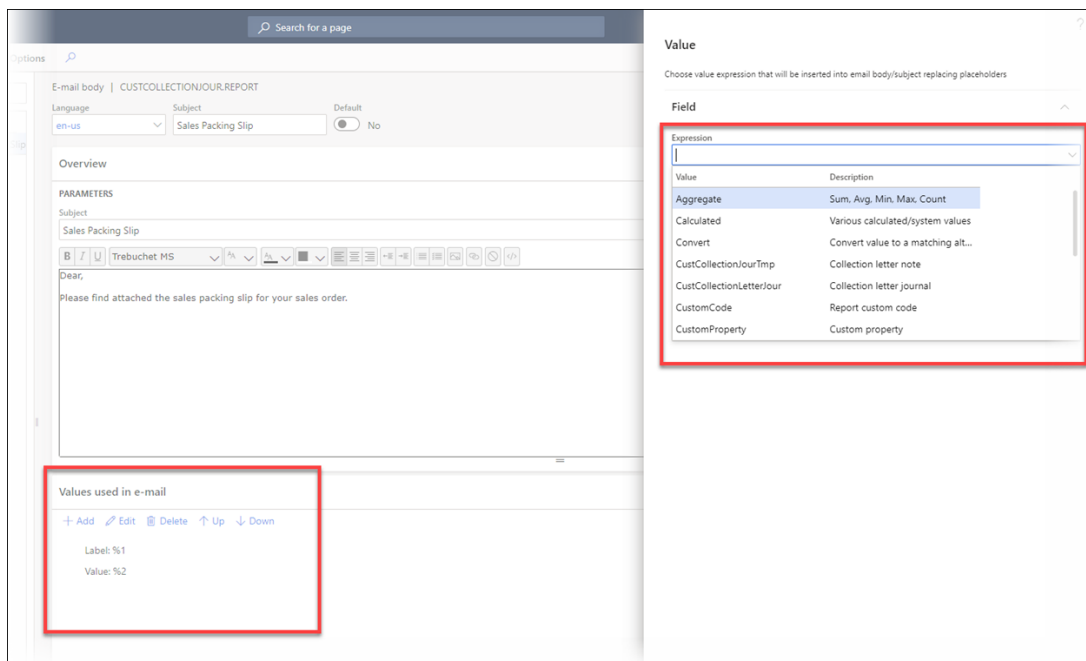
The screenshot shows the 'Finance and Operations' interface. At the top, there is a search bar and navigation options like 'Save', 'New', 'Delete', 'Duplicate', and 'Options'. Below this is a table with columns 'Language' and 'Subject'. The first row has 'en-us' and 'Sales Packing Slip'. To the right of the table is a configuration panel for the email body, titled 'E-mail body | CUSTCOLLECTION/JOUR.REPORT'. This panel includes a 'Language' dropdown set to 'en-us', a 'Subject' field with 'Sales Packing Slip', and a 'Default' toggle set to 'No'. Below these are sections for 'Overview' and 'PARAMETERS'. The 'PARAMETERS' section shows the 'Subject' field with 'Sales Packing Slip' and a rich text editor with the text 'Dear, Please find attached the sales packing slip for your sales order,'. The rich text editor has a toolbar with various formatting options like bold, italic, underline, font color, background color, bulleted list, numbered list, link, and unlink.

4. Click the **Values used in e-mail** section and select **Add**.

A dialog will pop-up. This dialog allows you to select tables and fields from the report itself. You can also use the dialog to add values through the expression editor, bring in parameter values, calculated fields, etc. Click **Ok**.

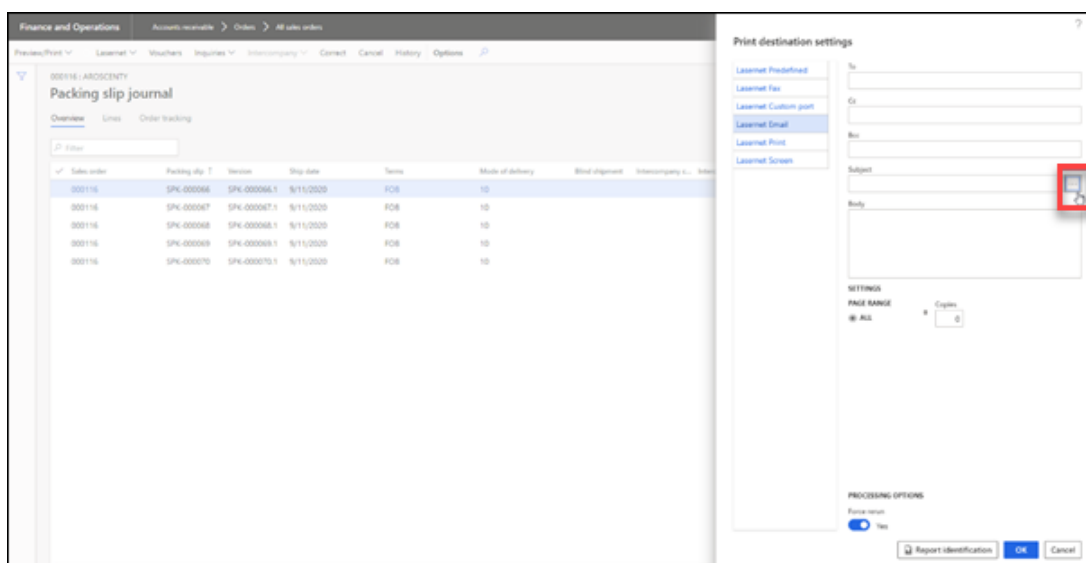
5. Select **Add** and keep adding any values you would like in your email subject and body.

The values you have added will be assigned placeholders. At the time of sending the email, the connector will pick up these values and pull them into the email subject and body where specified.



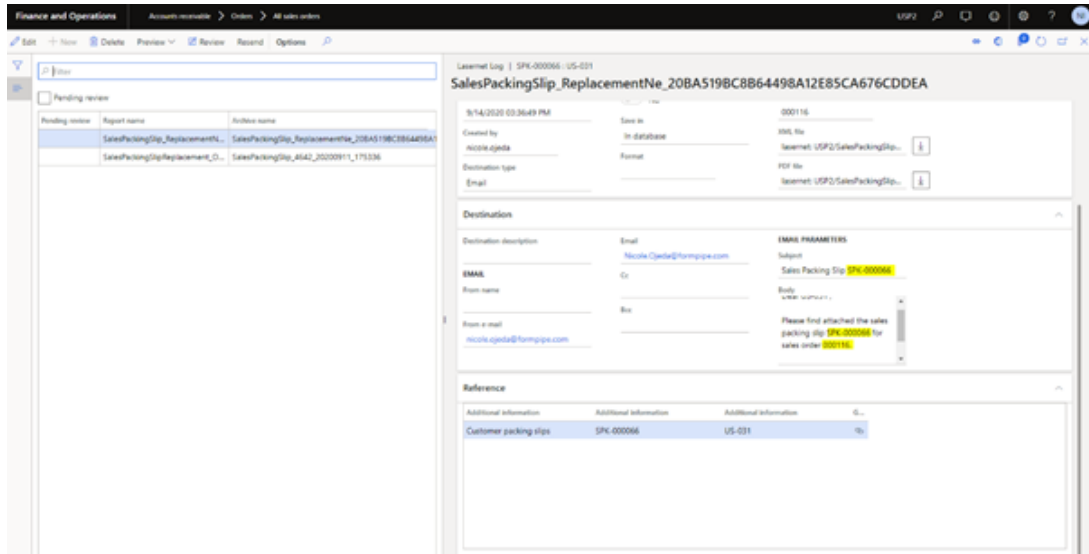
6. Add the placeholders to the Subject and email body as desired. Enable the Default switch for the translation you would like to serve as the default translation. If you only have one email subject and body translation, make it the default. **Save** and close.

7. Run the report. Navigate to your record, select **Lasernet Email** (or predefined destinations depending on your setup) and click the ellipses button.



8. Select **Load defaults** and then click **Ok**.

The email body loads the values for the placeholders:



HTML in Email Body

Lasernet Connector for Microsoft Dynamics 365 Finance and Operations includes the option for preparing an HTML (XHTML) email body instead of the plain text in Lasernet FO Connector.

Subject

 ...

On dialog

 ▼

Body

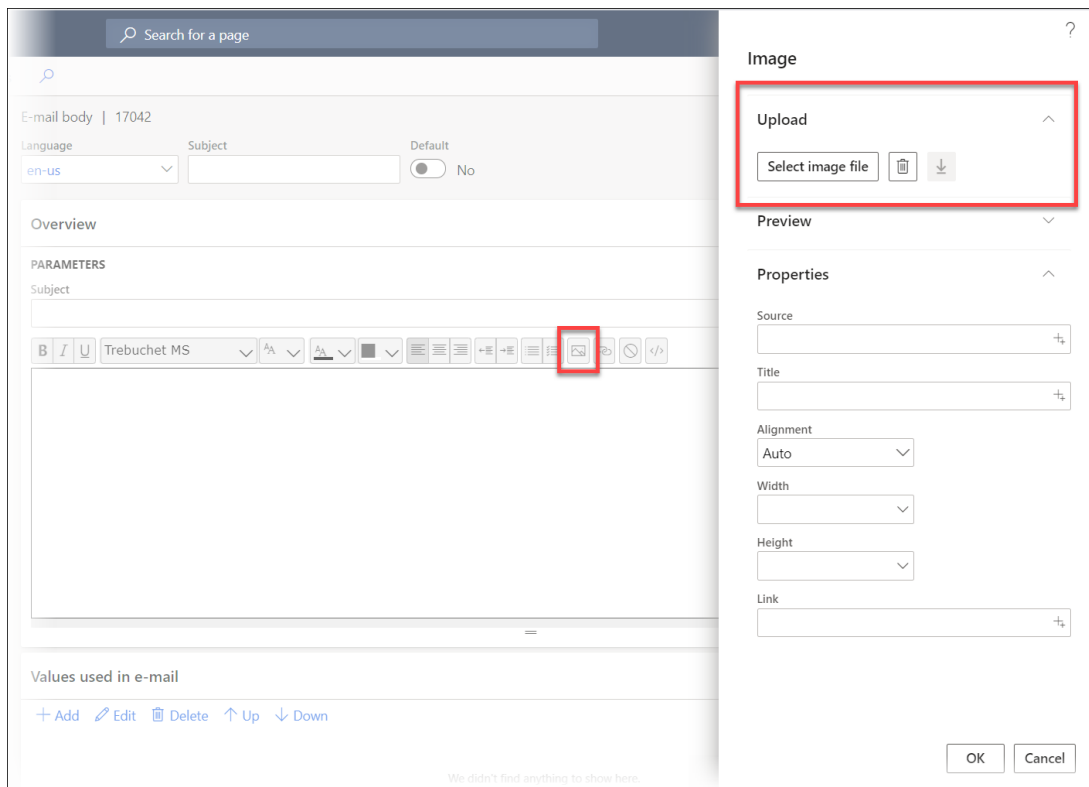
We hereby confirm you salesorder %1
Confirmation %2
Date %3
Kim Franck Agerholm
www.lasernetbyformpipe.com

Formpipe.

To add an image to the email body:

1. Click the **Insert image** button on the email body toolbar.

2. Click the **Select image file** button , choose an image and once you are happy with the Preview, click **Ok**.



It is possible to duplicate the configuration of email subject, email body and placeholders (%1, %2, etc.) by clicking the **Duplicate** button on the Action pane.

Once you have duplicated, enter a valid language in the language dropdown.