

How to set up a printing contract between Microsoft Dynamics 365 CE and Microsoft Dynamics 365 FO

- 2024-01-29 - Comments (0) - Lasename CE Connector General Information

Lasename for Dynamics 365

This article guides you through the process of setting up a contract between Microsoft Dynamics 365 Customer Engagement and Microsoft Dynamics 365 Finance and Operations.

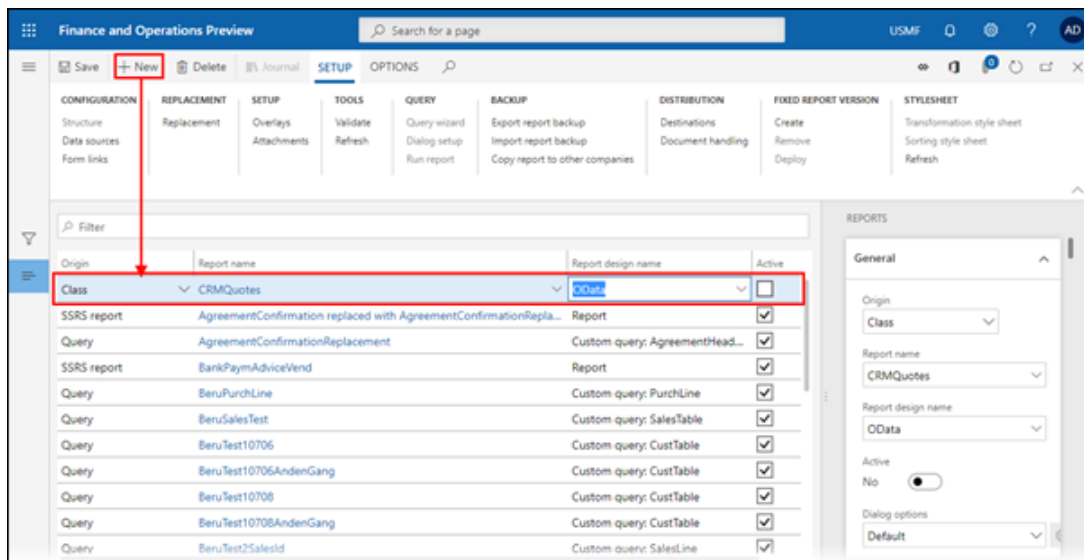
A printing contract is an established relationship between the executing party in Microsoft Dynamics 365 Customer Engagement (the ex button or the directsubmit button) and a specific report within Microsoft Dynamics 365 Finance and Operations.

Before you start to set up a printing contract, you must create a connection between Microsoft Dynamics 365 Customer Engagement and Microsoft Dynamics 365 Finance and Operations. For more details, see the [Create Connection in Finance and Operations](#) page of the Installation Guide for Lasename CE Connector.

Create a Class Report

Start by creating a class report which fetches the CRM data in the Microsoft Dynamics 365 Finance and Operations. To do this, follow these steps:

1. In Microsoft Dynamics 365 Finance and Operations, on the navigation pane, navigate to **Modules > Lasename > Common > Reports**.
2. On the *Reports* page, click the **New** button.
3. Within a new record which appears in the list, select **Class** as a report origin, enter a report name, and then select **OData** as a report design name.



4. Once you are done, the ODATA REPORT WIZARD opens to help you to build a report core structure. To this end, follow each step of the wizard defining the information you need. Thus, on step 2, select a connection name to define the OData connection to the Microsoft Dynamics 365 Customer Engagement environment.

5. On step 3 of the Wizard, define tables from which data is to be fetched.

It is possible to combine the data from both Microsoft Dynamics 365 Customer Engagement and Microsoft Dynamics 365 Finance and Operations in the same query/report.

Below you can find a list of options related to reports using the class as an origin:

- Run report from Microsoft Dynamics 365 Finance and Operations and only use data from Microsoft Dynamics 365 Customer Engagement.
- Run report from Microsoft Dynamics 365 Customer Engagement and only use data from Microsoft Dynamics 365 Customer Engagement.
- Run report from Microsoft Dynamics 365 Finance and Operations and use data from both Microsoft Dynamics 365 Finance and Operations and Microsoft Dynamics 365 Customer Engagement.
- Run report from Microsoft Dynamics 365 Customer Engagement and use data from both Microsoft Dynamics 365 Finance and Operations and Microsoft Dynamics 365 Customer Engagement.

Most of the features in Lasernet AX Connector for Microsoft Dynamics 365 Finance & Operations are supported by data/fields from Microsoft Dynamics 365 Customer Engagement and this data can be added either via the Query Wizard or via the expression.

The report you have created is to be further executed. Running the report is possible when *OData Dialogs* or *OData Direct Submit* is correspondingly configured. You can trigger this report using Lasetnet Connector for Microsoft Dynamics 365 Customer Engagement.

Configuring OData Dialogs

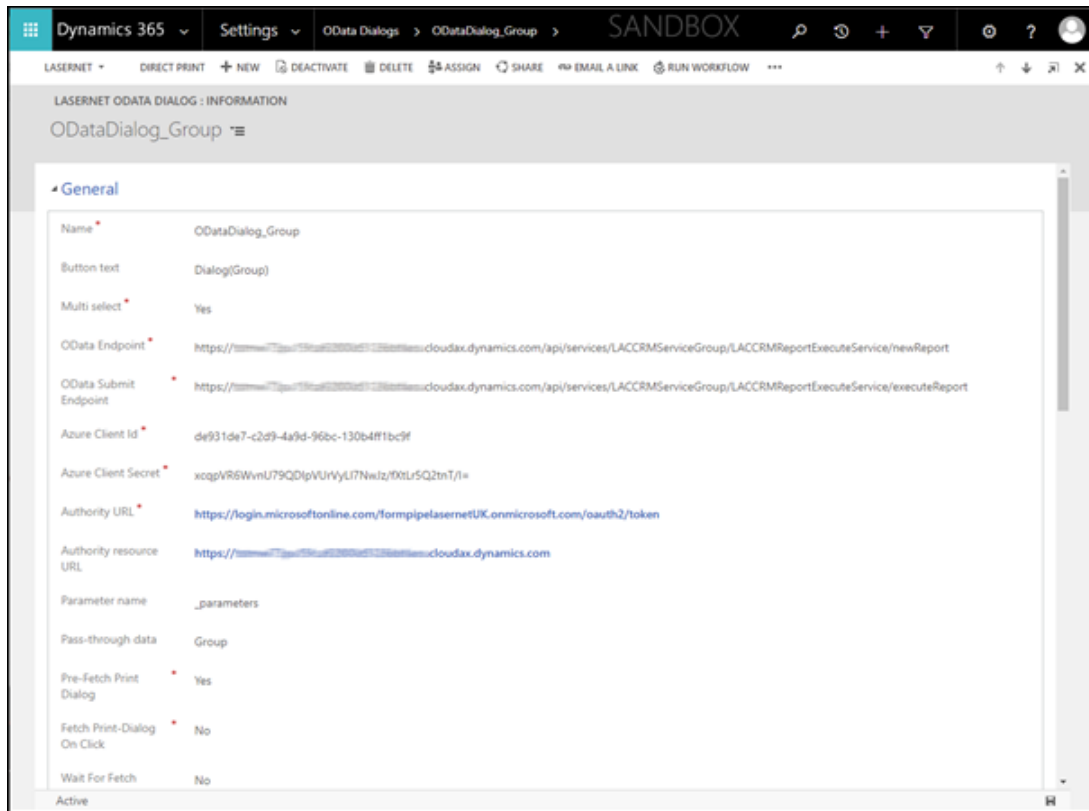
As prerequisites to the configuration process, *OData Dialogs* shall be added to the flyout menu. For more details, see the [How to configure the Lasernet Connector within CE | Creating a flyout menu](#) article. Afterward, follow the step-by-step instructions provided below.

1. In Microsoft Dynamics 365 Customer Engagement, on the **Sales** menu, click the down-pointed arrow to show the navigation menu flyout. Under the *Settings* flyout, locate the *Lasernet* list, and then click **OData Dialogs**.

The *Active Lasernet OData Dialogs* page opens.

2. Click the **New** button to add a new *OData Dialogs* connection and define when to trigger a report in Microsoft Dynamics 365 Customer Engagement.

Below is an example of the OData Dialogs configuration:



The screenshot shows the configuration page for an OData Dialog in Microsoft Dynamics 365. The page title is "LASERNET ODATA DIALOG : INFORMATION" and the specific dialog is named "ODataDialog_Group". The configuration is shown under the "General" tab. The fields and their values are as follows:

Field	Value
Name	ODataDialog_Group
Button text	Dialog(Group)
Multi select	Yes
OData Endpoint	https://[redacted].cloudax.dynamics.com/api/services/LACCRMServiceGroup/LACCRMReportExecuteService/newReport
OData Submit Endpoint	https://[redacted].cloudax.dynamics.com/api/services/LACCRMServiceGroup/LACCRMReportExecuteService/executeReport
Azure Client Id	de931de7-c2d9-4a9d-96bc-130b4ff1bc9f
Azure Client Secret	xcqpVR6WmU79QDlpVUrVylU7Nwizf9XtLr5QZtnT/1=
Authority URL	https://login.microsoftonline.com/70mpipelasernetUK.onmicrosoft.com/oaauth2/token
Authority resource URL	https://[redacted].cloudax.dynamics.com
Parameter name	._parameters
Pass-through data	Group
Pre-Fetch Print Dialog	Yes
Fetch Print-Dialog On Click	No
Wait For Fetch	No

The status at the bottom of the page is "Active".

As a result, you have created an action that allows executing a report in Microsoft Dynamics 365 Finance and Operations. When a corresponding button is clicked in Microsoft Dynamics 365 Customer Engagement, this action is then applied, and thus, the report is executed.

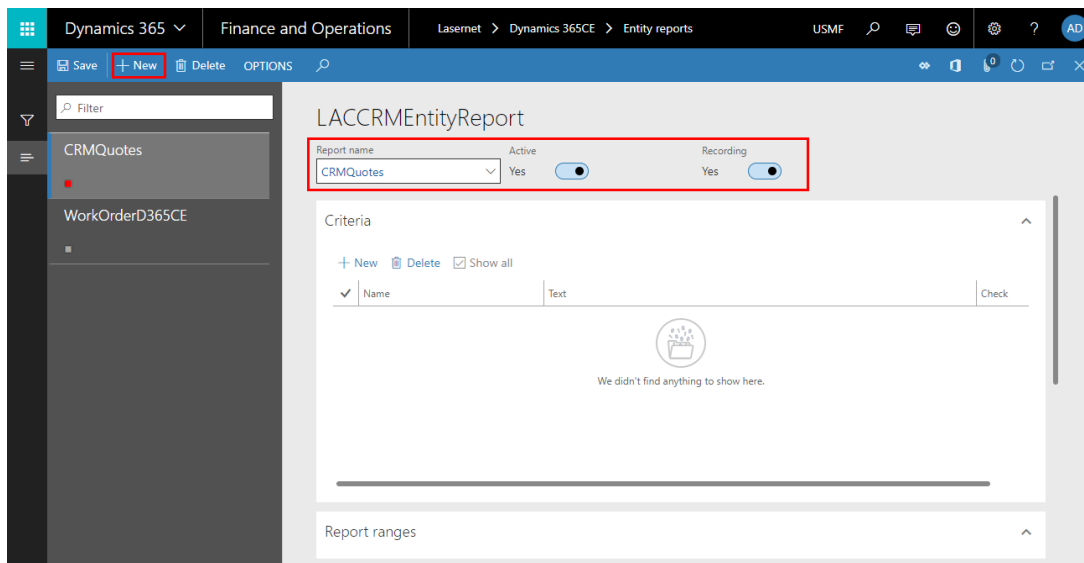
Users now need to verify that the required settings are defined in Microsoft Dynamics 365 Finance and Operations, and it properly acts when a report is triggered in Lasetnet Connector for Microsoft Dynamics 365 Customer Engagement.

While specifying URLs (including Authority resource URL), avoid trailing slash(/) character at the end to avoid issues with the dialog not being able to find the printing contract.

Entity reports

Switch back to Microsoft Dynamics 365 Finance and Operations and create a printing report between Microsoft Dynamics 365 Finance & Operations and Microsoft Dynamics 365 Customer Engagement. Follow the steps listed below:

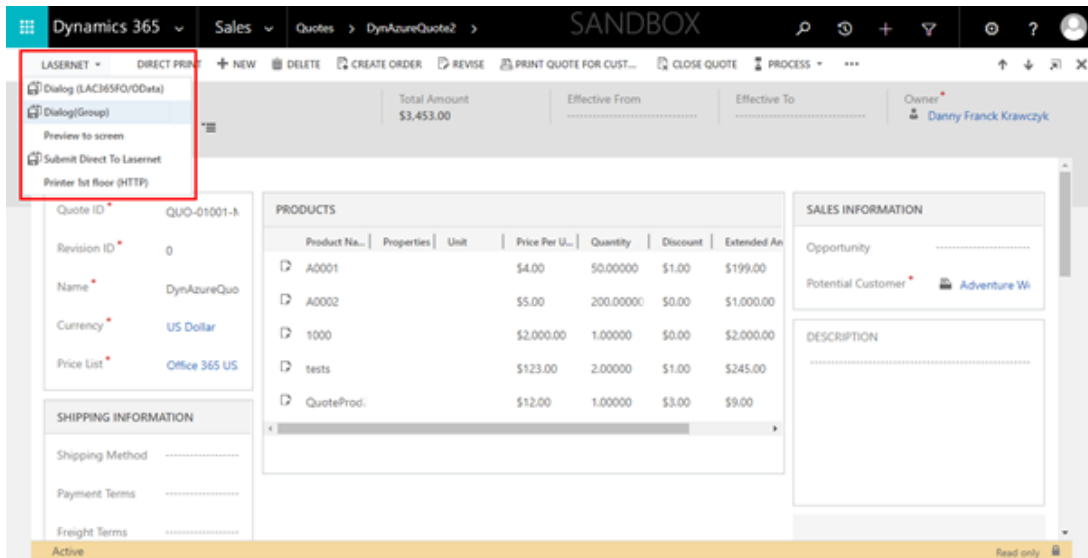
1. In Microsoft Dynamics 365 Finance and Operations, on the navigation pane under *Modules*, click **Lasernet**, and then under *Dynamics 365CE*, click **Entity reports**.
2. Click the **New** button.
3. Specify a report name. Put both the **Active** and **Recording** toggle buttons to **Yes** status. Once you are done, click the **Save** button.



Recording status allows to log your next actions and, thus, set up a rule which you can use the next time when performing the same actions.

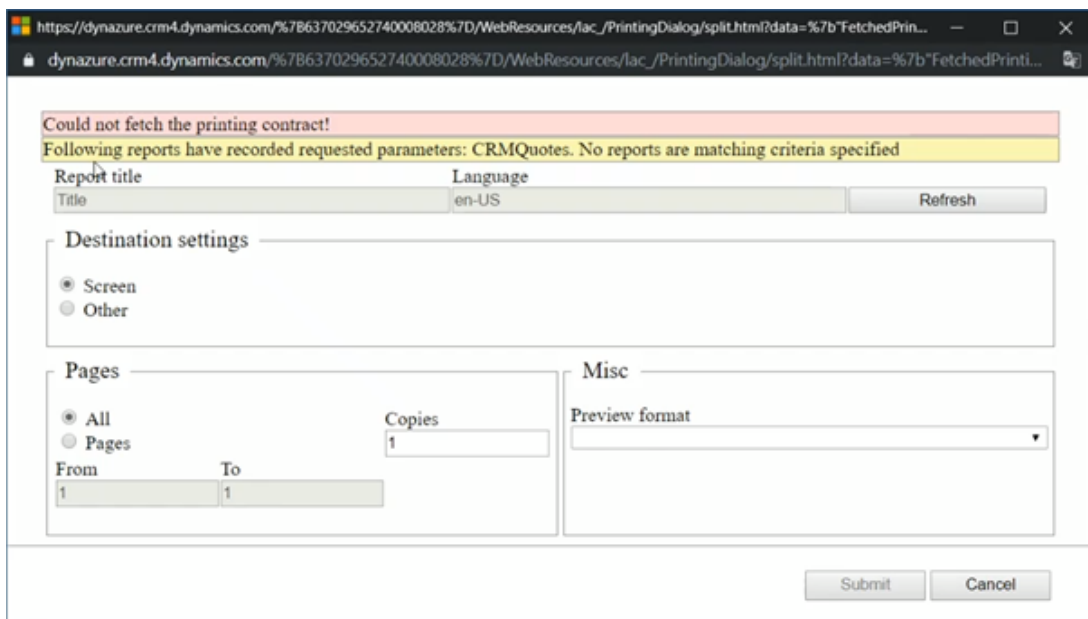
4. Switch back to Microsoft Dynamics 365 Customer Engagement. On the *Sales* menu, click the down-pointed arrow to show the navigation menu flyout. Under the *Settings* flyout, locate the *Collateral* list, and then click **Quotes**. In the *Quotes* list, click the required quote item to open it.

5. On the quote page displayed, click **Lasernet**, and then click the button which allows opening a form connected to Microsoft Dynamics 365 Finance & Operations. On the screenshot below, it is the *Dialog(Group)* button. You give a name to this button while configuring *OData Dialogs* by specifying a value in the *Button text* box on the *OData Dialogs* configuration page.



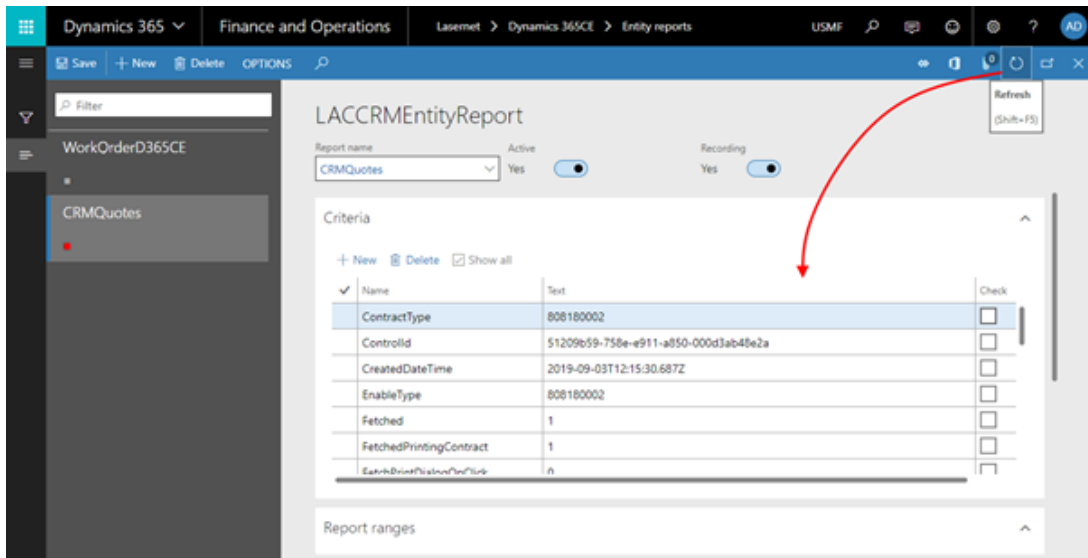
6. In the window displayed, click the **Refresh** button. As a result, a form connected to Microsoft Dynamics 365 Finance & Operations opens.

As you can see in the message, the requested parameters have been recorded.

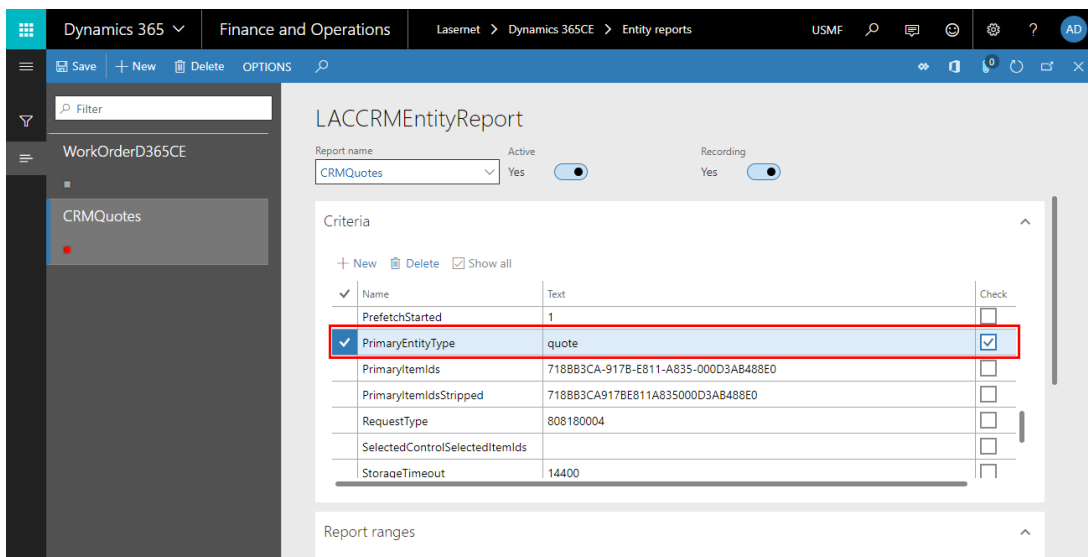


7. Switch back to Microsoft Dynamics 365 Finance and Operations, to the *Entity report* page, and click the **Refresh** button.

As you can see on the screenshot below, the *Criteria* list is populated with records that have been sent from Microsoft Dynamics 365 Customer Engagement to Microsoft Dynamics 365 Finance & Operations.



8. In the **Criteria** list, locate the **PrimaryEntityType** criterion denoting a quote, and select the **Check** check box for it.

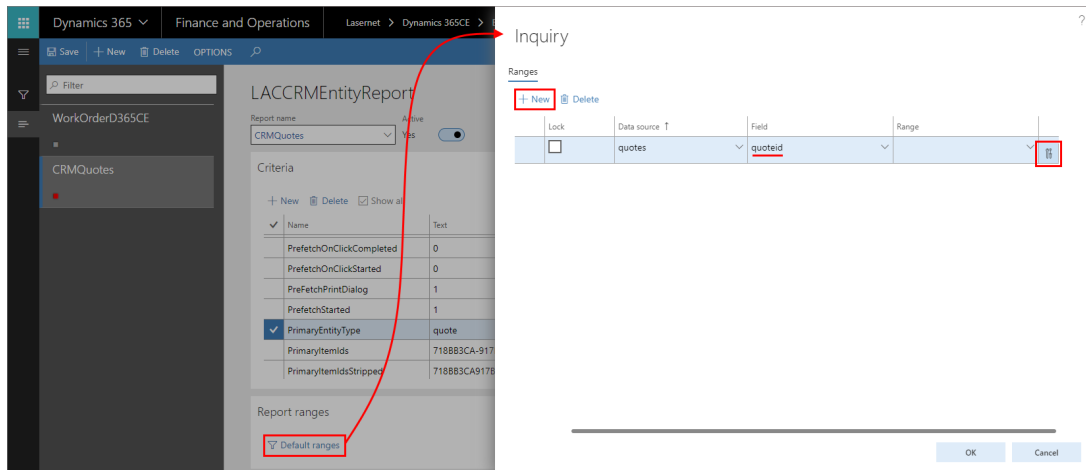


By selecting the primary entity type and specifying it as a quote, you define that the report you are currently creating is to run every time when a quote is sent. To avoid sending all the quotes available in the system, you shall apply a filter by defining a report range.

Report ranges

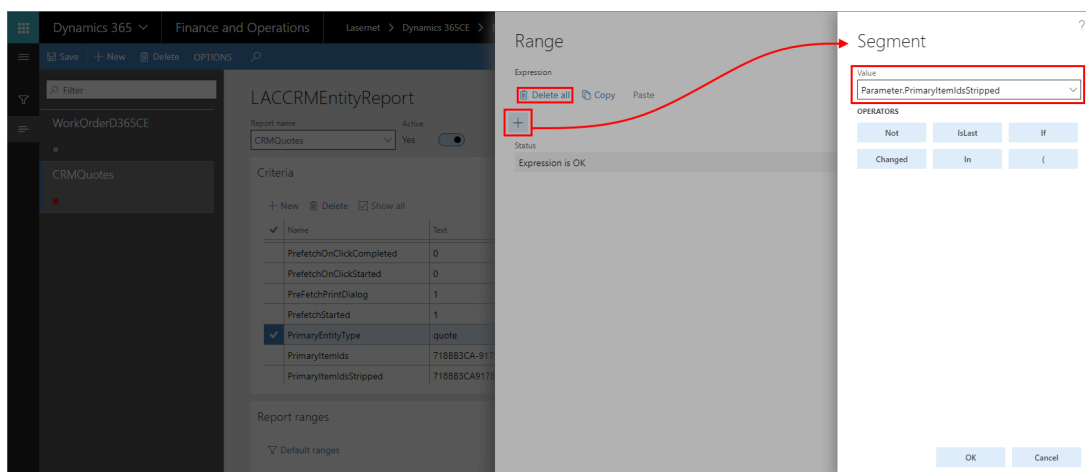
1. In Microsoft Dynamics 365 Finance and Operations, on the page of the entity report you create, click **Default ranges**.
2. On the *Inquiry* pane that appears, click the **New** button.
3. Specify a data source as well as a field name for the range.

4. Once you are done, click the settings button to specify the range itself.



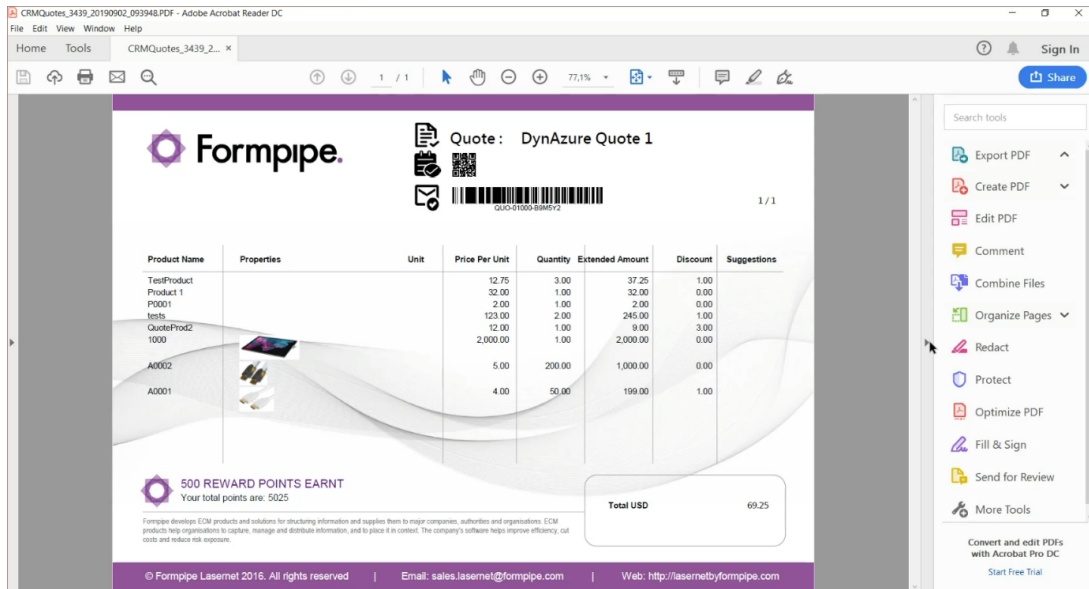
5. On the *Range* pane that appears, first, click **Delete all**, and then click the **plus** sign button.

6. On the **Segment** pane that appears, specify the required value.



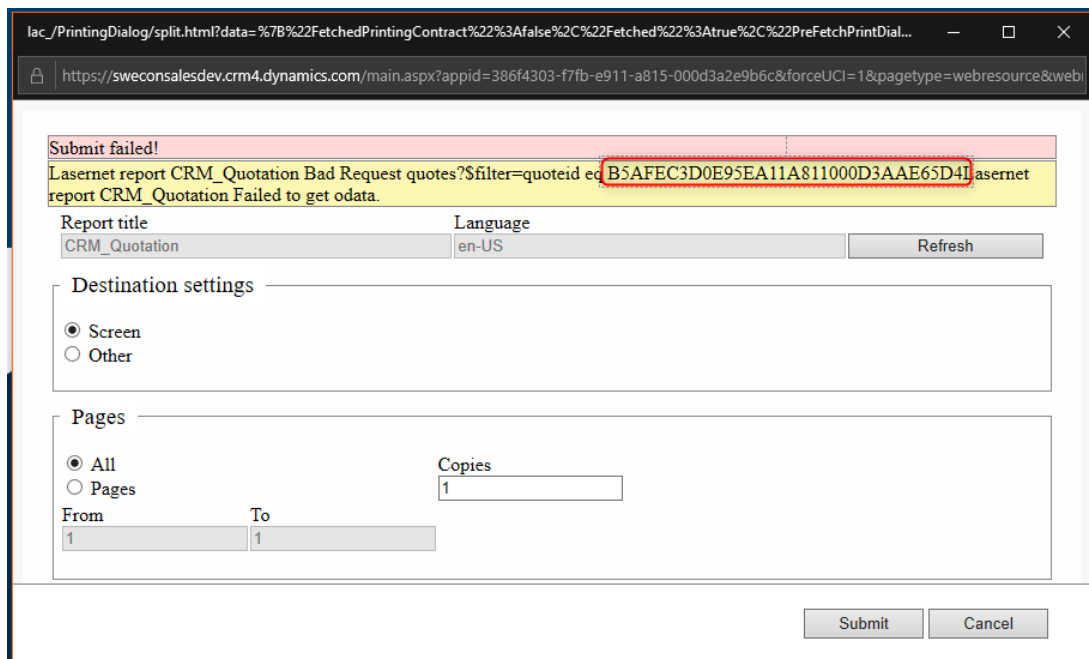
7. Once you are done, click **OK** on each pane. Before saving the changes you have made, switch the **Recording** toggle button to the **No** status, and then click **Save**.

Thus, every time you click **Dialog(Group)** under **Lasernet** in Microsoft Dynamics 365 Customer Engagement, the report with the parameter you have specified is run.



Additional information

You can run into a filter error when running the report:



There is a stripped and a non-stripped ID

ance and Operations Search for a page

Edit + New Delete Options

Filter

Statement_Of_Work

Subscription Agreement

CRMQuotes

LACCRMEntityReport

Report name: CRMQuotes Active: Yes Recording: No

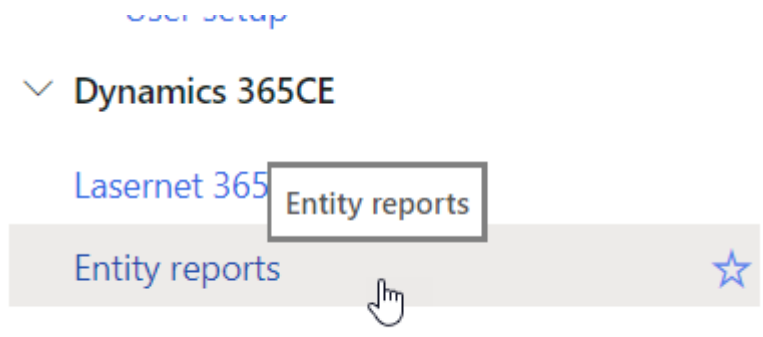
Criteria

+ New Delete Show all

Name	Text	Check
PrimaryEntityType	quote	
PrimaryItemIds	D63DC8FD-3A59-EA11-A811-00...	
PrimaryItemIdsStripped	D63DC8FD3A59EA11A811000D...	
RequestType	808180004	

Follow these steps to stop the error:

1. Navigate to **Entity reports**.



2. Under *Report ranges*, click **Default ranges**.
3. Validate/add that the *primaryItemIds* is being used.

Inquiry

Ranges

+ New Delete

Lock	Data source ↑	Field	Range
<input type="checkbox"/>	quotes	quoteid	Parameter.PrimaryItemIds