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How do I log and send emails from Dynamics 365 Customer Engagement using OData print dialog?

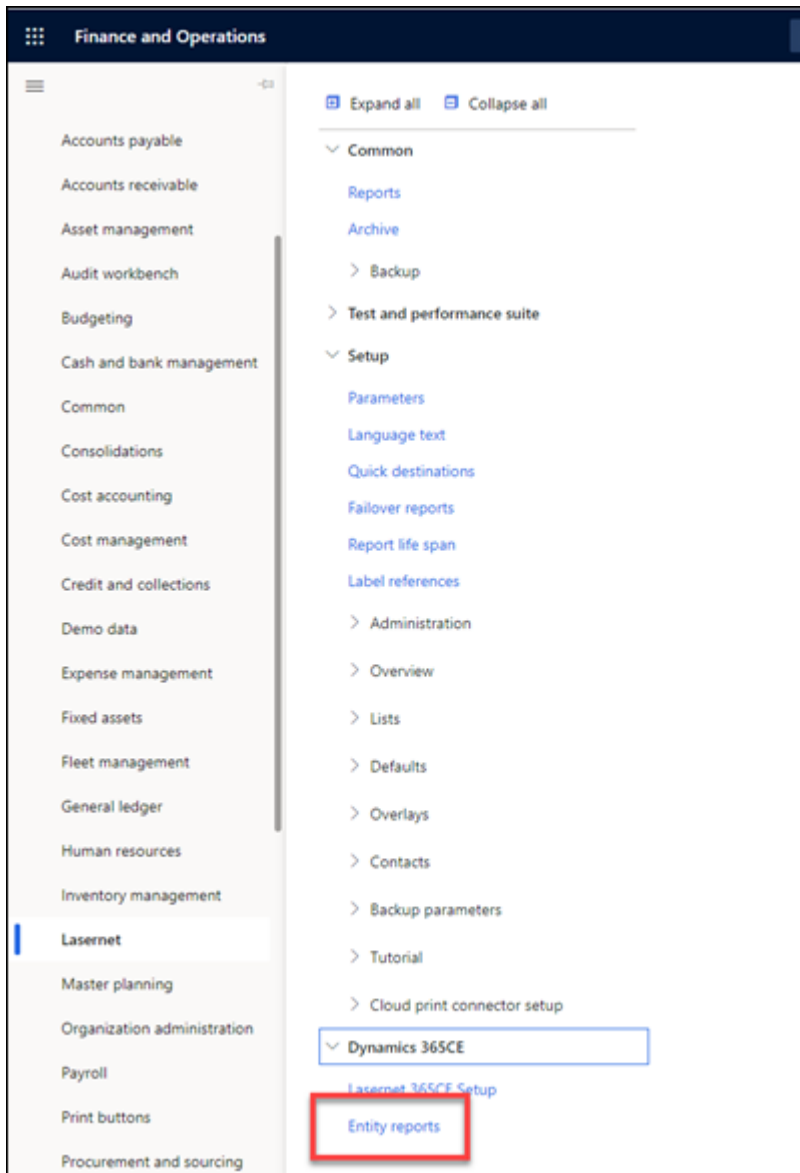
- 2023-10-17 - Comments (0) - Lasetnet CE Connector FAQs

Lasernet for Dynamics 365

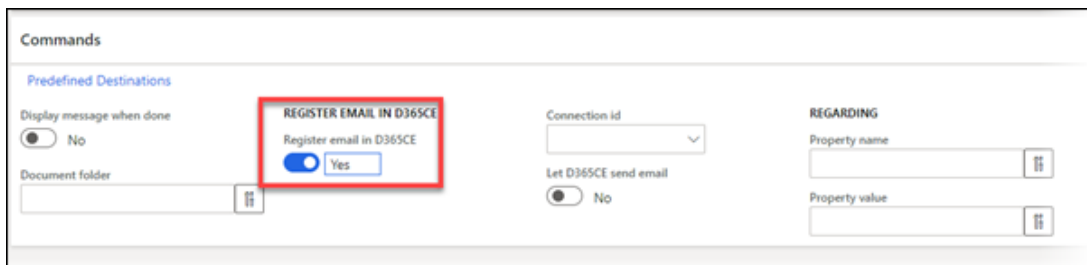
This article gives step-by-step instructions to be able to log and send emails from the Dynamics 365 Customer Engagement using the OData print dialog.

Follow these steps:

1. Open the Dynamics 365 Finance and Operations application and navigate to **Lasernet > Dynamics 365CE > Entity reports**.



2. Click the **Commands** fast tab and enable the **Register email in D365CE** toggle button which allows creating activities in Microsoft Dynamics 365 Customer Engagement. By enabling the **Let D365CE send email** toggle button, you allow Microsoft Dynamics 365 Customer Engagement to send emails.



3. To configure this use the **Property name** and **Property value** fields under **REGARDING** to associate the email with the relevant record and send email from Dynamics

365CE and ensure the connection ID is specified.

Please refer to Microsoft documentation for Web-API OData reference for the Entity Field to be included in the property name.

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/web-api/email?view=dynamics-ce-odata-9>

For example, for the quote entity in D365CE, the **Property name** and **Property value** should be set as shown below:

The screenshot shows the Dynamics 365 CRM report configuration interface. The 'Criteria' section contains a table with the following data:

Name	Text	Check
ContractType	808180002	<input type="checkbox"/>
ControlId	efcd25e8-e107-e011-a813-000d3aaa467a	<input type="checkbox"/>
CreatedDateTime	2020-10-22T15:39:25.738Z	<input type="checkbox"/>
EntityType	808180002	<input type="checkbox"/>
Fetches	1	<input type="checkbox"/>
FetchesPrintingContract	0	<input type="checkbox"/>
FetchPrintDialogOnClick	0	<input type="checkbox"/>

The 'Commands' section shows a 'REGISTER EMAIL IN D365CE' command with a 'Connection id' dropdown set to 'D365CE'. The 'REGARDING' section shows the 'Property name' set to 'regardingobjectid_quote@odata...' and the 'Property value' set to '/quotes'+Parameter.PrimaryItemId...'.

Property name
Expression
X Remove Delete all Copy Paste
"regardingobjectid_quote@odata.bind"

Property value
Expression
X Remove Delete all Copy Paste Undo
"quote(+Parameters.ParmItemId+)"

4. Select **Email** from the Destination type dropdown menu, specify the parameters and click **Submit** to submit the OData print dialog button.

Report title: CRMQuotes Language: de Refresh

Destination settings

Destination type: Email

To: contactemail@email.com

Cc:

Bcc:

Subject: Quote 5

Body: Quote 5

Pages: All (selected), Pages, Copies: 1

Misc: Force report in language: de

Submit Cancel

Try refreshing Timeline or browser if the email is not showing in the timeline/activity pane. If D365CE settings do not allow an email to be sent to unresolved email recipients, add the recipient as a contact. Otherwise, the email record will be created in a draft state. The user's mailbox is enabled for processing for sending the email successfully.

Test01
Quote

Summary Details Related

Timeline

Search timeline

Enter a note

VG Email from Vinu Gopakumar
Quote 5
Quote 5
CRMQuotes_Vinu_571B774DA2F84D87R4EB--
Active 1:22 PM

VG Email from Vinu Gopakumar
Quote 4
Quote 4
CRMQuotes_Vinu_752E1F58843748DF99A9--
Active 1:16 PM

VG Email from Vinu Gopakumar

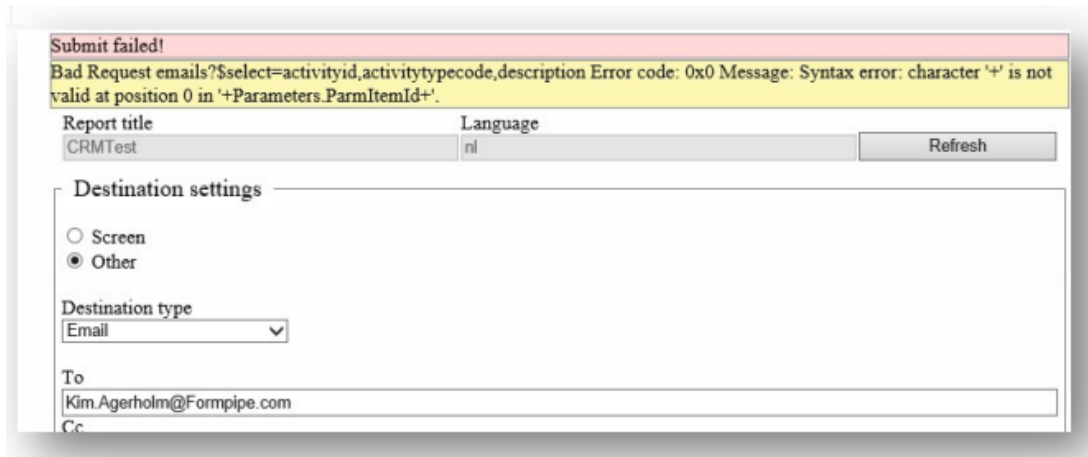
Error messages - D365 FO Version 6.6.0

Improved error messages are introduced for the OData statements (D365CE) in D365 FO version 6.6.0.

Parse & output error messages when executing OData statements

Having the expression "quote(+Parameters.ParmItemId+)" would throw the following error when submitting the report in LAC365CE/D365CE. Proper expression for the property are

"/quotes(" + Parameter.PrimaryItemIds + ")"



Submit failed!
Bad Request emails?\$select=activityid,activitytypecode,description Error code: 0x0 Message: Syntax error: character '+' is not valid at position 0 in '+Parameters.ParmItemId'.

Report title	Language	
CRMTest	nl	Refresh

Destination settings

Screen
 Other

Destination type
Email

To
Kim.Agerholm@Formpipe.com

Cc

When submitting an Email from D365CE without permissions a meaningful exception is shown
Submit failed! Bad Request emails(9b88ec37-531f-eb11-a813-002248998d35)/Microsoft.Dynamics.CRM.SendEmail Error code: 0x8004480d
Message: User does not have a send-as privilege.