datom
Software Development

documentation: „datom_Email2Record"

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1 Content

2 Introduction

EMailToEntity is able to create sets of data out of emails, that have been created in Dynamics 365. The email needs to be filled with some specific key words.

3 Functionality

If an email has been created in Dynamics 365, the plugin checks, if all requirements for creating an set of data are fulfilled. If so, the to be created sets of data are filtered and saved to the specific Dynamics 365 entity. The Dynamics 365 data sets will be saved under consideration of the Dynamics dublication verification. After that the sets of data will be related to other Dynamics 365 entitys if requested. (only one to many)

4 Installation

It is just a plugin, that is running on the email entity in Dynamics 365. The "datom configuration solution" must be installed first and a licence key must be generated. If everything is installed and configured correctly, only the SDK datom.Crm.EMailToEntity.Plugin.MailGenerateEntity must be activated finally.

5 Configuration

The configuration of the plugin is managed using the "datom configuration".

Key	Parent	Beschreibung
email2entity	-	This is the universal key and the primary element
licence	email2entity	Without a licence the plugin is not able to run properly
condition	email2entity	Here a field will be defined, where the requirements relate to, so the email can be analysed properly. Multiple conditions are possible.
entity	condition	Here a value will be defined related to the conditions, so that the requirements are fulfilled and the email can be analysed properly.
„EntityName"	entity	If values were added to the key "entity" childs, these values need to have an entity name. For the values a match tag must be set inside of the email.
relation	„EntityName"	Tob e able to relate dats sets to other Dynamics entitys, an relation name has to be set. Only one relation will be accepted and only OnetoMany.
fields	„EntityName"	container for the fields of each entity
„FieldName"	fields	Here a field name will be requested. The value is equal to the match-tag of the email
separator	„FieldName"	Using a seperator plenty sets of data can be generated

6 Use Cases

EMail:
Subject = Company name - test

body:

[dozent]
[first name] Max [\first name]
[last name] Muster [\last name]
[\dozent]

[company]
[comany name] Max & muster consultancy[\company name]
[\company]

[seminaroffer]
[seminaroffer] competenceprogram lead; Basics of Change Management; Alteration value-design[\seminaroffer]
[\seminaroffer]

email2entity		email2entity	
email2entity:condition	condition	email2entity	subject
email2entity:condition:entity	entity	email2entity:condition	Akademie für den Mittelstand -...
email2entity:condition:entity:account	account	email2entity:condition:entity	firma
email2entity:condition:entity:account:fields	fields	email2entity:condition:entity:account	
email2entity:condition:entity:account:fields:name	name	email2entity:condition:entity:account:fields	firmenname
email2entity:condition:entity:contact	contact	email2entity:condition:entity	dozent
email2entity:condition:entity:contact:fields	fields	email2entity:condition:entity:contact	
email2entity:condition:entity:contact:fields:firstname	firstname	email2entity:condition:entity:contact:fields	vorname
email2entity:condition:entity:contact:fields:lastname	lastname	email2entity:condition:entity:contact:fields	nachname
email2entity:condition:entity:contact:relation	relation	email2entity:condition:entity:contact	contact_customer_accounts
email2entity:condition:entity:datom_seminare	datom_seminare	email2entity:condition:entity	seminarangebote
email2entity:condition:entity:datom_seminare:fields	fields	email2entity:condition:entity:datom_seminare	
email2entity:condition:entity:datom_seminare:fields:datom_name	datom_name	email2entity:condition:entity:datom_seminare:fie...	seminarangebot
email2entity:condition:entity:datom_seminare:fields:datom_name:separator	separator	email2entity:condition:entity:datom_seminare:fie...	;
email2entity:condition:entity:datom_seminare:relation	relation	email2entity:condition:entity:datom_seminare	datom_contact_datom_seminar...
email2entity:licence	licence	email2entity	H8PV6m0wHdvdSUlzmQ7i4b8...