datom
Software Development

documentation: „datom_Email2Record“

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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”.

<table>
<thead>
<tr>
<th>Key</th>
<th>Parent</th>
<th>Beschreibung</th>
</tr>
</thead>
<tbody>
<tr>
<td>email2entity</td>
<td>-</td>
<td>This is the universal key and the primary element</td>
</tr>
<tr>
<td>licence</td>
<td>email2entity</td>
<td>Without a licence the plugin is not able to run properly</td>
</tr>
<tr>
<td>condition</td>
<td>email2entity</td>
<td>Here a field will be defined, where the requirements relate to, so the email can be analysed properly. Multiple conditions are possible.</td>
</tr>
<tr>
<td>entity</td>
<td>condition</td>
<td>Here a value will be defined related to the conditions, so that the requirements are fulfilled and the email can be analysed properly.</td>
</tr>
<tr>
<td>„EntityName“</td>
<td>entity</td>
<td>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.</td>
</tr>
<tr>
<td>relation</td>
<td>„EntityName“</td>
<td>To be 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.</td>
</tr>
<tr>
<td>fields</td>
<td>„EntityName“</td>
<td>container for the fields of each entity</td>
</tr>
<tr>
<td>„FieldName“</td>
<td>fields</td>
<td>Here a field name will be requested. The value is equal to the match-tag of the email</td>
</tr>
<tr>
<td>separator</td>
<td>„FieldName“</td>
<td>Using a separator plenty sets of data can be generated</td>
</tr>
</tbody>
</table>
6 Use Cases

EMail:
Subject = Company name - test

body:

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

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

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