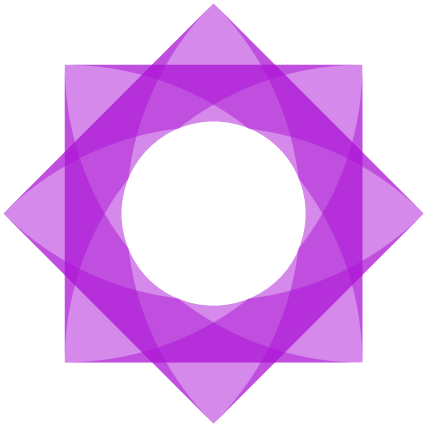

Lasernet Essentials User Guide.

Alice Petruzzella
v.1
2024-10-14

Formpipe.

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1 User Guide.

1.1 Scope

This guide explains how to install and use the new, embedded version of Lasernet. It describes the main features and how to accomplish simple tasks.

1.2 Guide Structure

Consult the following chapters for a detailed breakdown of the process:

- Introduction
- Installation
- The Fastest Way To Get Started
- Lasernet Workspace
- OneClick
- Print Preview
- Embedded Lasernet Form Editor
- FO SMTP Setup

1.3 Intended Audience

This guide is intended to introduce new partners and customers to the Lasernet solution. Our goal is to embark on a digital journey with customers and partners as a free solution and, as time passes and their needs progress, evolve with them and adapt our solution to those needs.

1.4 Video Resources

Watch the following videos to learn more about Lasernet Essentials:

- Introducing Lasernet Essentials
- Getting Started with Lasernet Essentials
- Lasernet Essentials Explained: an FAQ Guide

2 Introduction.

Lasernet Essentials is the new, free, embedded version of Lasernet. It aims to offer a user experience that is largely keyboard-free, with most functions accessible through mouse navigation alone.

An additional benefit is Lasernet Essentials' streamlined approach, which promotes adherence to best practices by offering fewer options while ensuring that the available choices are well-considered and effective.

The Professional version of Lasernet FO Connector will offer similar benefits concerning simplifications and enhancements to those in Lasernet Essentials. Users have the option to transition from Lasernet Essentials to Lasernet Professional or Enterprise and continue utilizing the same methods/features they are accustomed to in Lasernet Essentials.

Lasernet Essentials enables users to learn the basic features before embarking on the full-fledged Professional or Enterprise solution of the Lasernet platform.

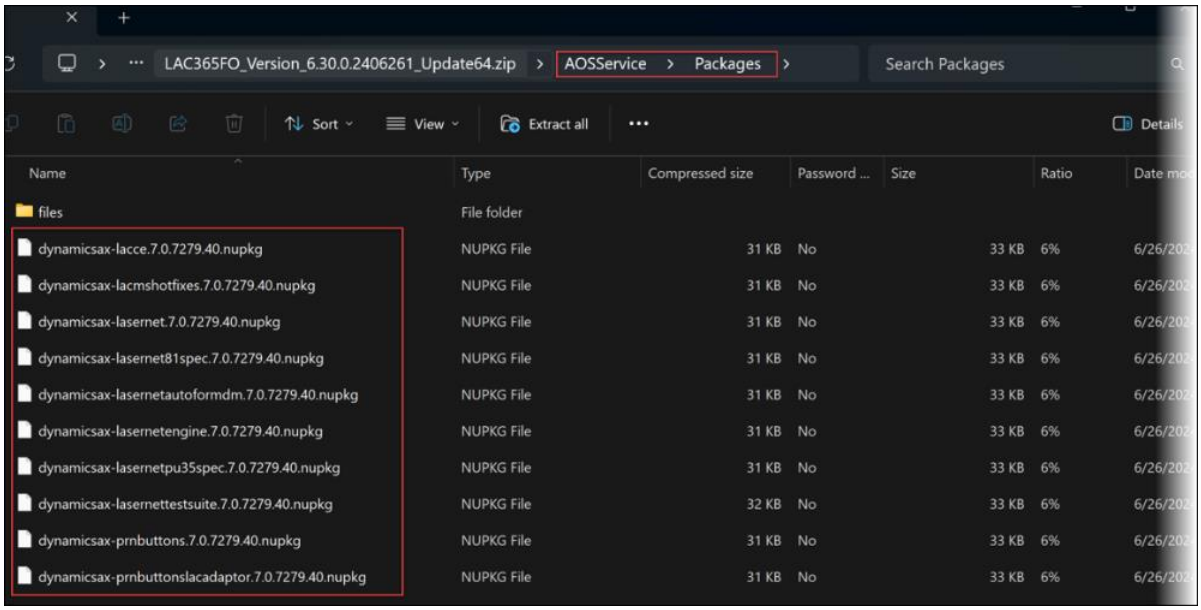
3 Installation.

Lasernet Essentials can be downloaded from the **Download** section of the Formpipe Support Portal.

Once you have downloaded the package, install it on your machine via LCS (Microsoft Dynamics Lifecycle Services) - the same as any other version of Lasernet FO Connector.

If other ISVs (Independent Software Vendor) are already installed on your machine, you must create a new package containing Lasernet Essentials and the other ISV packages and push them all into the Finance and Operations environment.

You must include all eight Connector and two Print Button models in the new package:



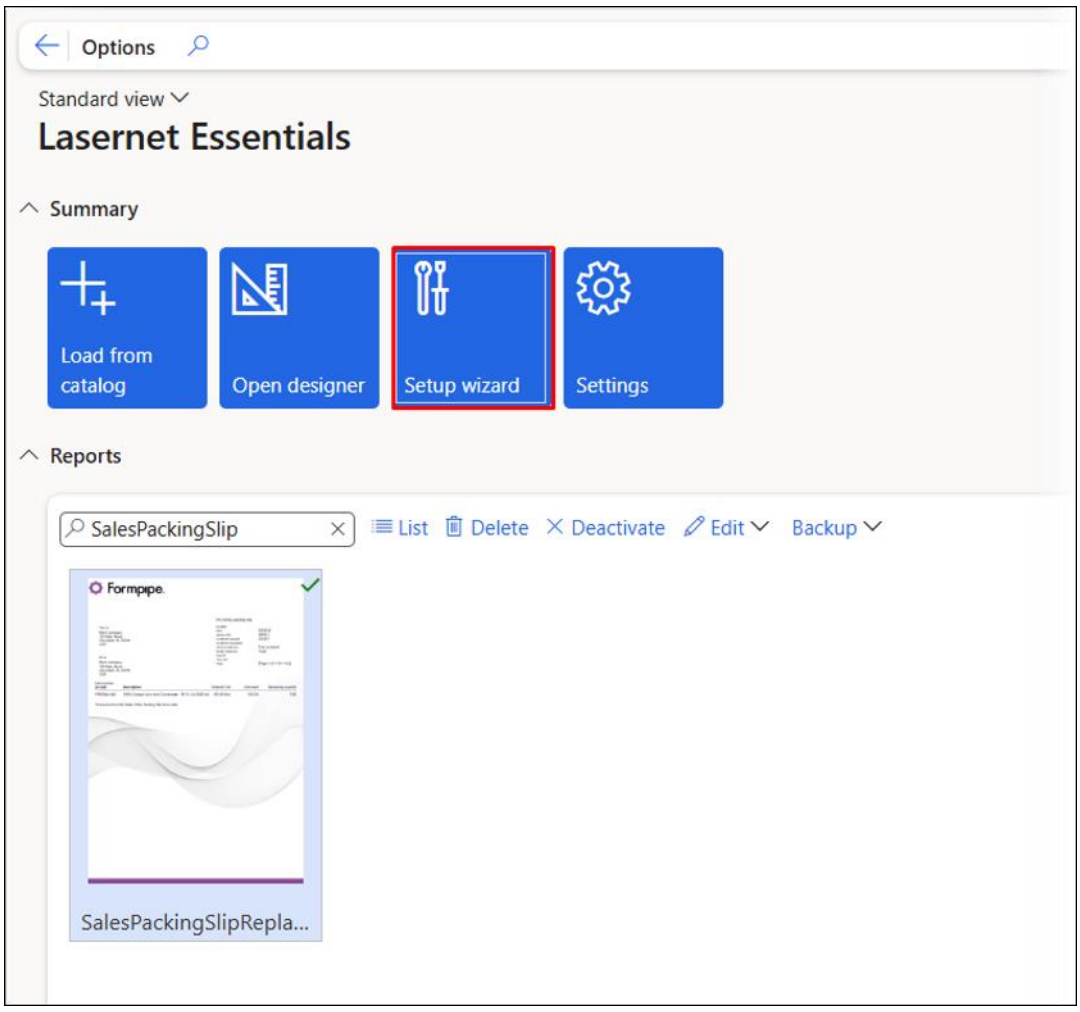
The following table describes the function of each file in the package:

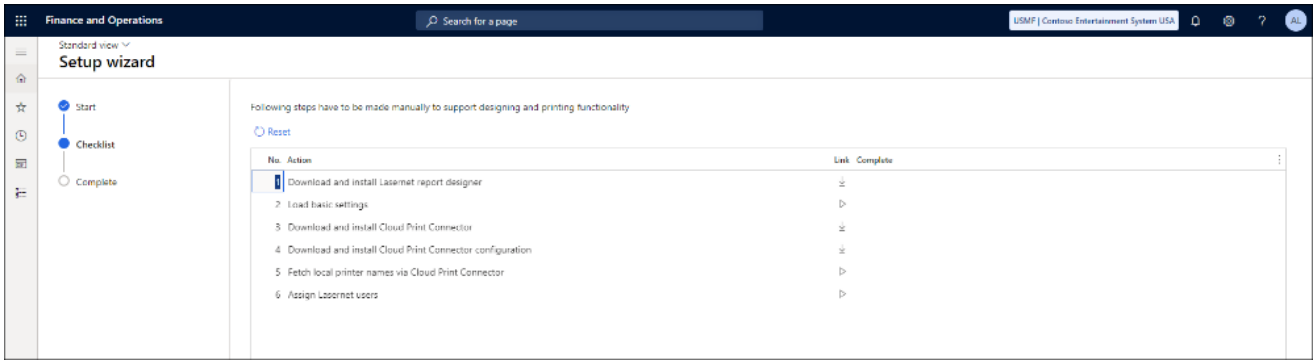
Model	Description
Lasernet	Core and main engine for the Lasernet FO Connector
Lasernet81Spec	Additional requirements in relation to 8.1 and newer versions of standard Dynamics 365 for Finance and Operations
PRNButtons	Lasernet Print Buttons

PRNButtonsLACAdaptor	Adaptor between the Lasernet Print Buttons and Lasernet FO Connector
LACCE	Integration to CE from Lasernet FO Connector
LACMSHotfixes	Hotfixes for standard Dynamics 365 for Finance and Operations
Lasernet Test Suite	Test & Performance Suite
LasernetPU35Spec	Support of Wave labels in Dynamics 365 for Finance and Operations
Lasernet Autoform DM	Integration to the Lasernet Autoform (Archive)
Lasernet Engine	Embedded integration with Lasernet

4 The Fastest Way To Get Started.

The embedded solution is intended to be fast and easy for users to install, configure, and use. By following the steps in the **Setup wizard**, you can be ready to use Lasernet Essentials in less than five minutes.





1. **Download and install Lasernet report designer**: Required - This step contains a link to the Lasernet Form Editor installation package, which will enable you to design the report layout. Download the package and install the software.

2. **Load basic settings**: Required – This step will load default basic settings from Formpipe Azure Storage. These basic settings include parameters, connections to Formpipe Azure Storage, and configuration settings enabling report execution and printout.

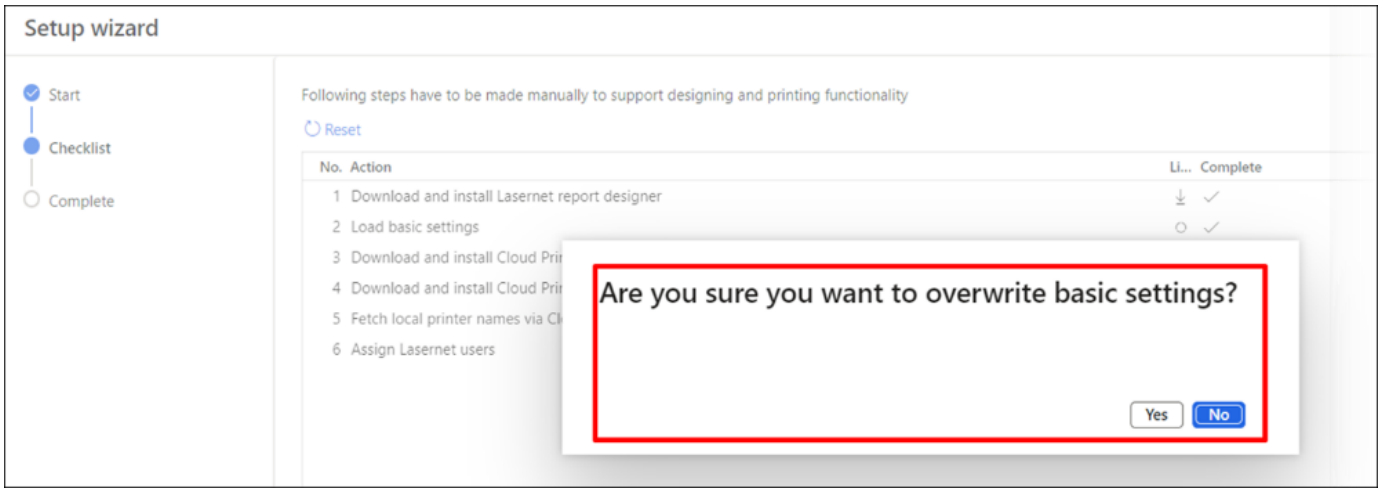
3. **Download and install Cloud Print Connector**: Optional but encouraged – This step contains a link to the Cloud Print Connector installation package. Cloud Print Connector is installed on a local computer and waits for print jobs from Dynamics 365. When a report is printed from Dynamics 365, the printout file will be sent to your local computer, and Cloud Print Connector will redirect it to the chosen printer on your network. Once the Cloud Print Connector installer has been downloaded, navigate to your print server/machine that acts as a print server and install the client. Remember to run it as a User (not System) account.

4. **Download and install Cloud Print Connector configuration**: Optional but encouraged – The Cloud Print Connector configuration is a configuration file for Cloud Print Connector. It contains the necessary information to keep the connection with Dynamics 365 active. Ensure you have installed the Cloud Print Connector. Then, pick this option from the same machine running your Cloud Print Connector. It will automatically update its configuration.

5. **Fetch local printer names via Cloud Print Connector**: Optional, dependent on steps 3 and 4 – Fetching printers will instruct the previously configured Cloud Print Connector to prepare the list of your locally available printers and load this list to Dynamics 365.

6. **Assign Lasernet users**: Optional but encouraged - Assign users to the **Lasernet User** security role. This role only provides access to the Lasernet destinations within the printer dialog. If the reports are not configured for Lasernet, a user of this role has access to the standard destinations (SSRS). If a user is a System Administrator and you do not need any more testing, you do not need to complete this step.

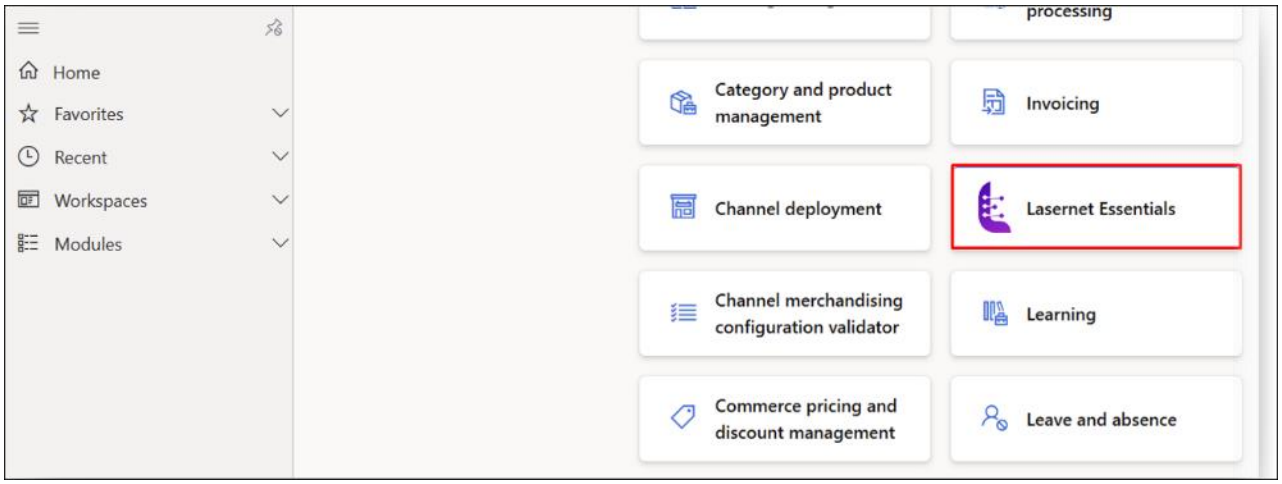
The following prompt appears if basic settings are already in place:


Setup wizard
Start
Checklist
Complete
Following steps have to be made manually to support designing and printing functionality
Reset
No.
Action
Li...
Complete
1 Download and install Lasernet report designer
2 Load basic settings
3 Download and install Cloud Pri
4 Download and install Cloud Pri
5 Fetch local printer names via Cl
6 Assign Lasernet users
Are you sure you want to overwrite basic settings?
Yes
No

5 Lasernet Workspace.

Access to the **Lasernet Essentials** workspace is restricted to users with the roles of Lasernet Administrator or System Administrator, similar to report previewing functions. The logo on the workspace tile will indicate whether Lasernet Essentials or Lasernet Professional is being used.

The workspace tile is shown as follows when using Lasernet Essentials:

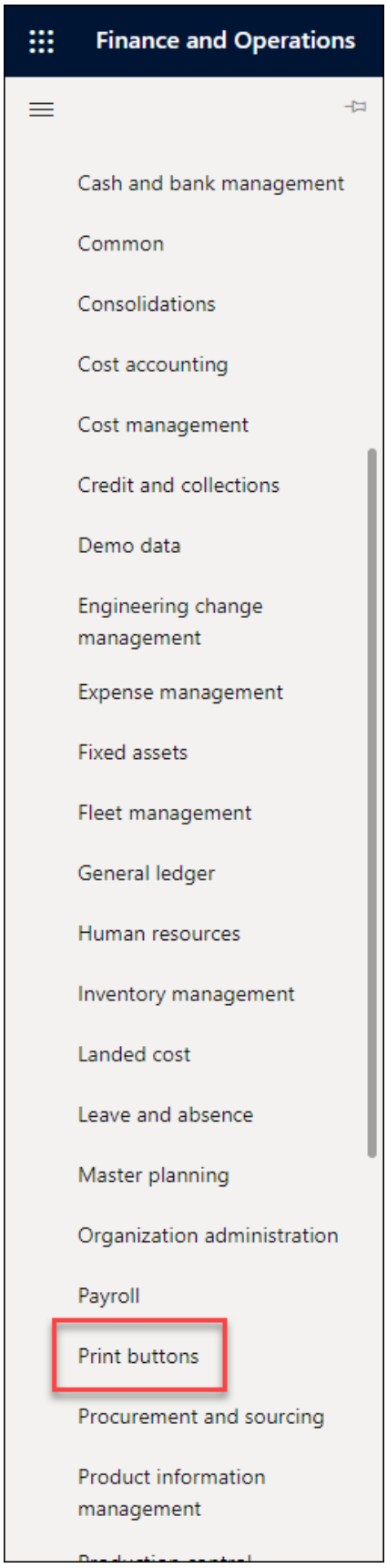


Lasernet Essentials is used when no **License code** has been entered, while Lasernet Professional requires a valid **License code**.

Functionality within Lasernet Essentials is accessible via the workspace or when previewing a report.

The embedded version will hide the **Lasernet** module that is usually available in your Finance and Operations environment. Instead, users will be able to access the Connector functionalities through the **Lasernet Essentials** workspace tile.

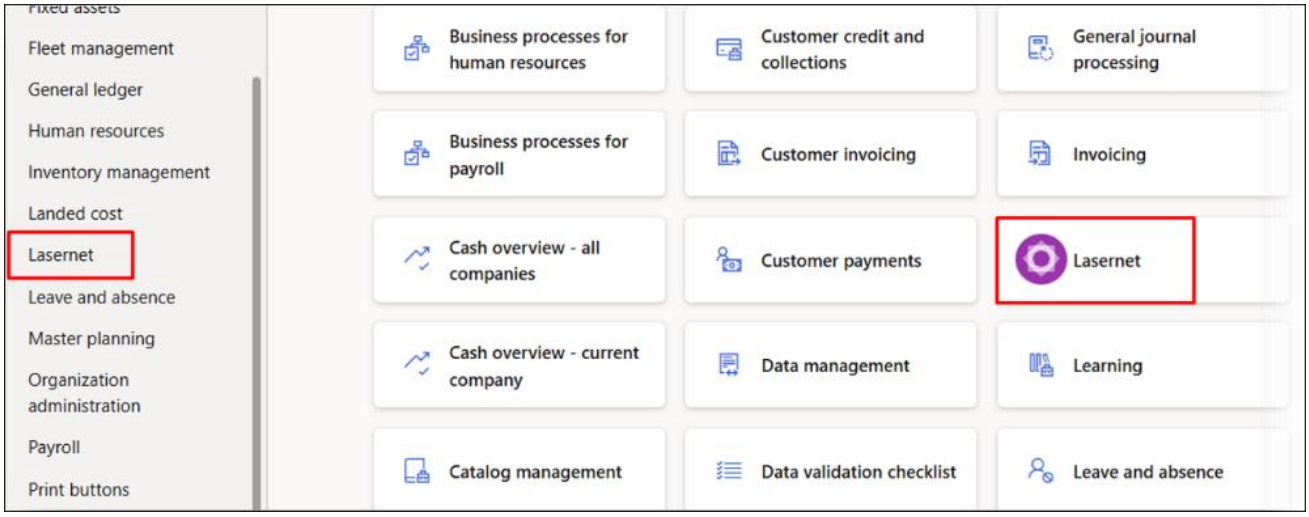
The **Print buttons** module is still available.

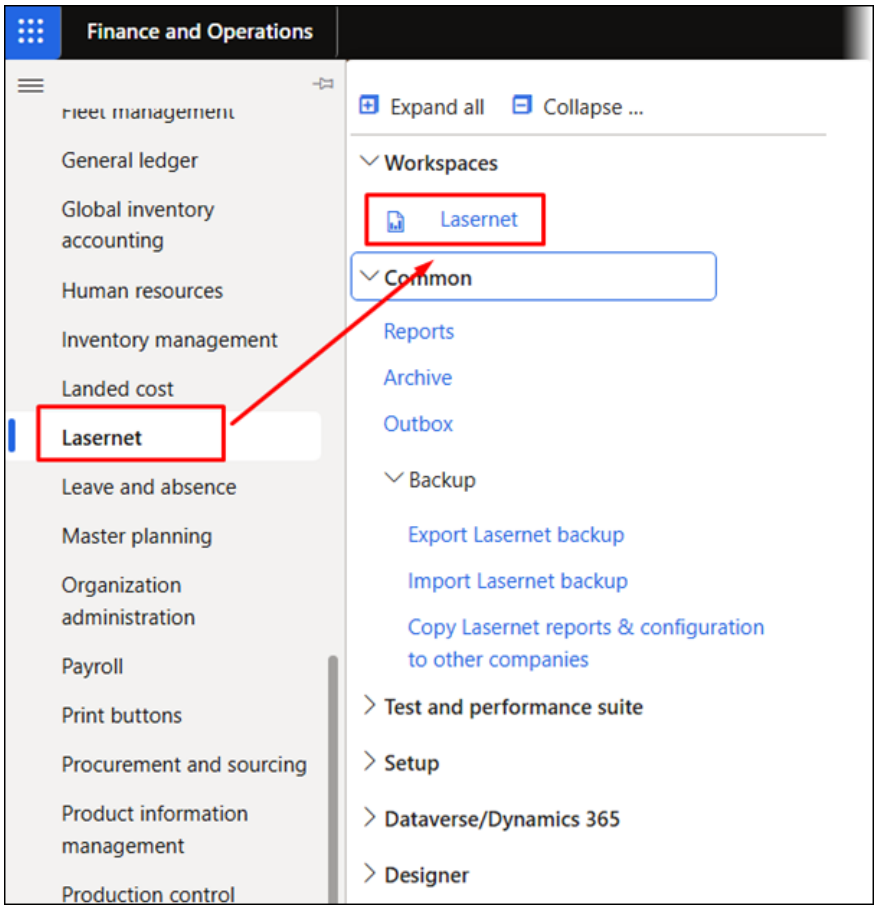

Finance and Operations
Cash and bank management
Common
Consolidations
Cost accounting
Cost management
Credit and collections
Demo data
Engineering change management
Expense management
Fixed assets
Fleet management
General ledger
Human resources
Inventory management
Landed cost
Leave and absence
Master planning
Organization administration
Payroll
Print buttons
Procurement and sourcing
Product information management

The embedded version will enable users to:

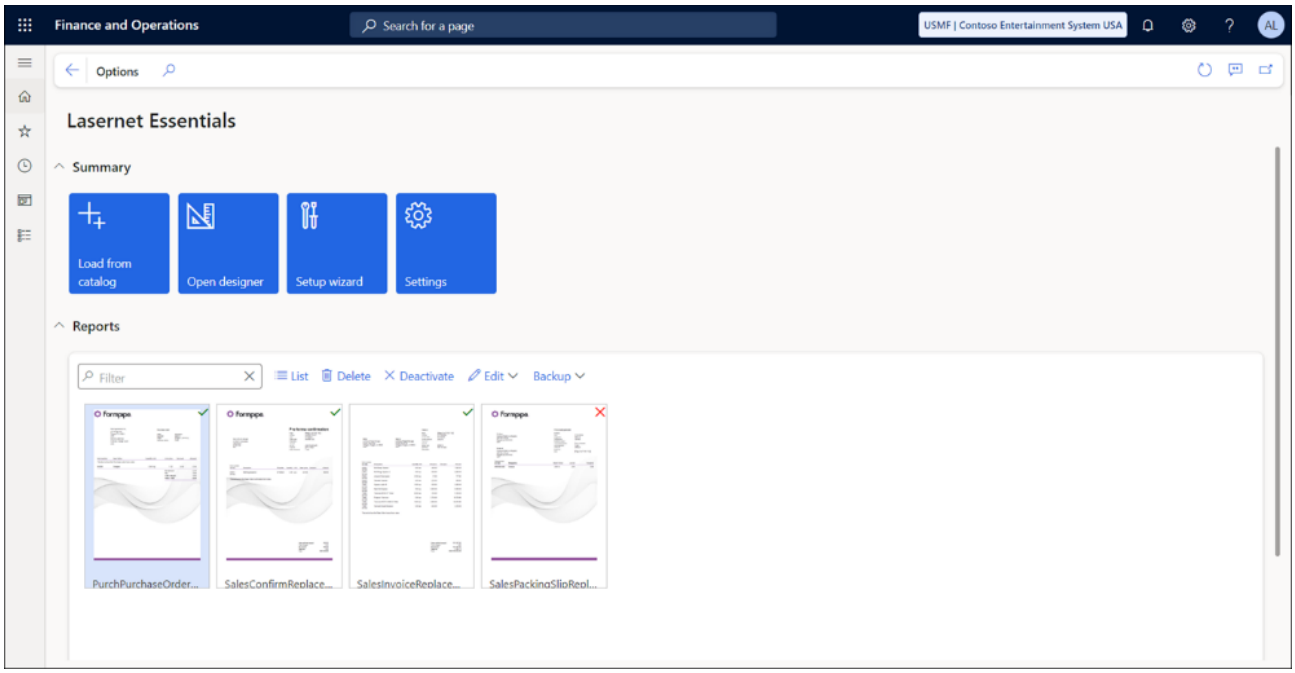
- Manage the license type (Essentials, Professional, Enterprise)
- Manage reports (active/inactive)
- Design reports via the report **Query wizard**
- Manage logos and images and add fields and attachments to their reports
- Manage Predefined destinations for their reports
- Back up and restore reports and report settings

Entering a valid **License code** will activate the Professional version and give you access to all functionality via the modules or the workspace:





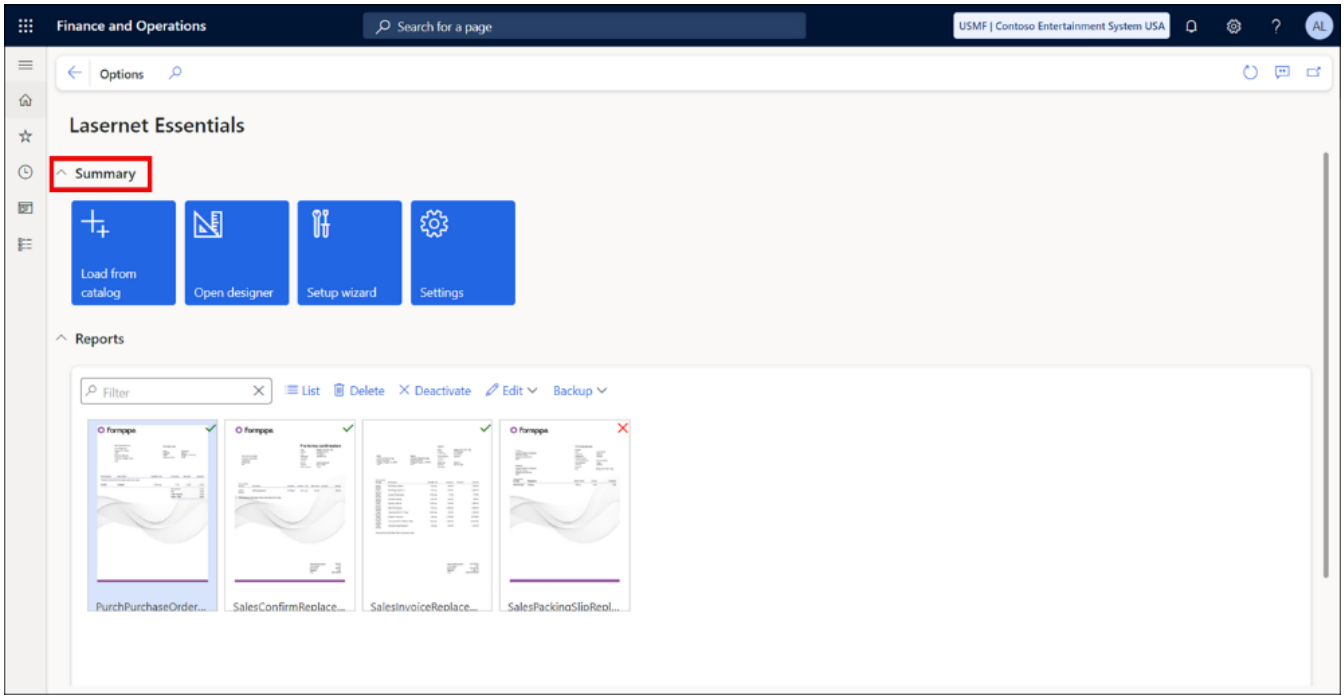
After opening your **Lasernet Essentials** workspace, you will be able to access the following:



The workspace for Lasernet Essentials is streamlined to provide core output management functions.

5.1 Summary

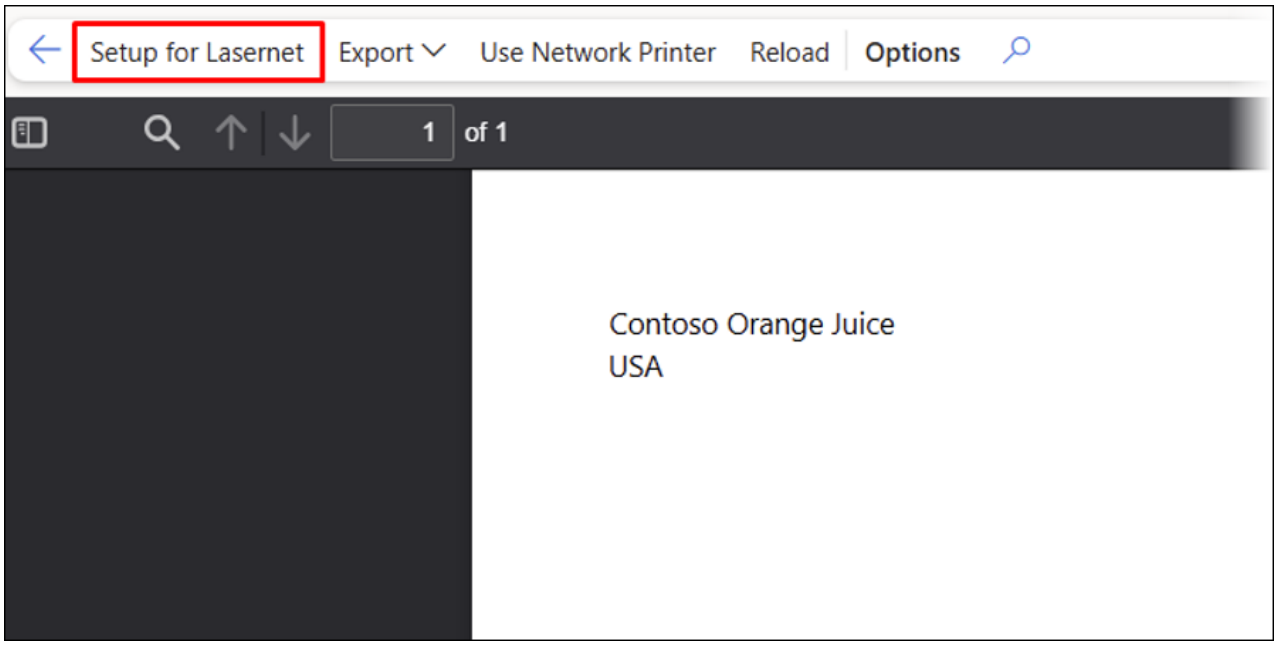
In the **Summary** section of the **Lasernet Essentials** workspace, you can configure a new report, manage the product license, set up your embedded version using a guide, or quickly open the report designer (Lasernet Form Editor) to update or enhance your active and inactive reports.



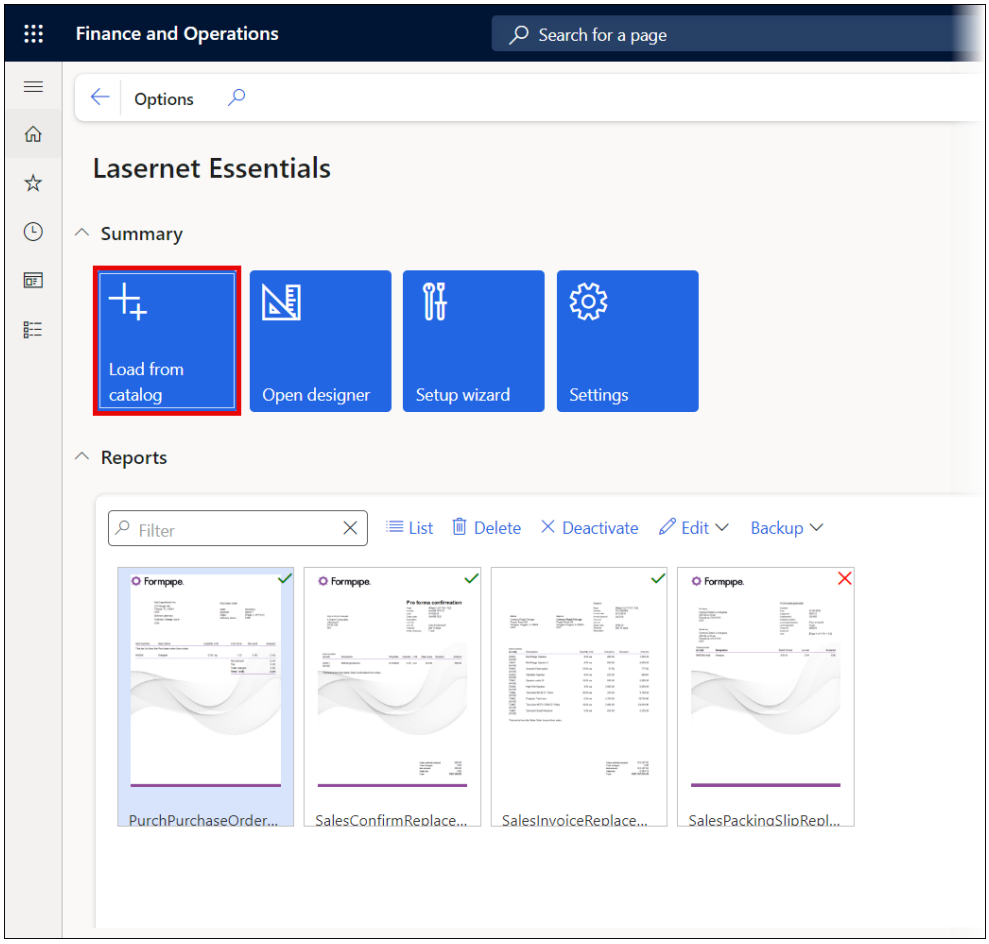
5.1.1 Configure New Report

Configuring a new report with Lasernet Essentials is a fairly straightforward process and can be achieved either when running a report or by using the **Load from catalog** function within the **Lasernet Essentials** workspace.

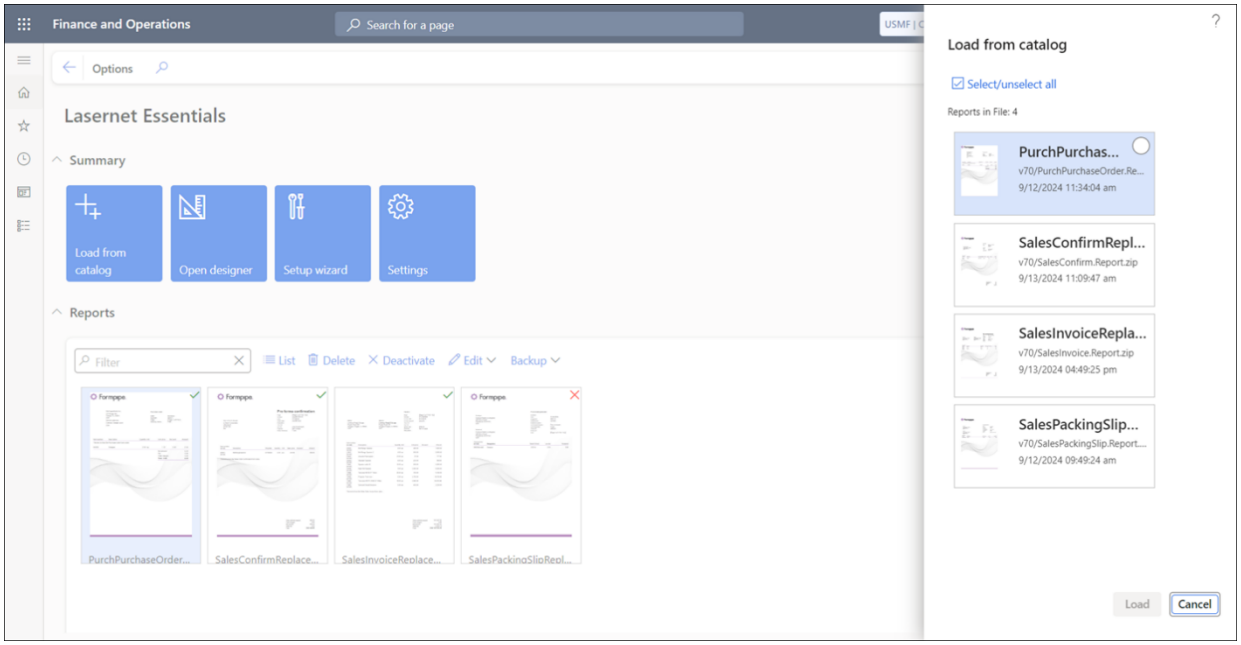
- Option 1: Use the **Setup for Lasernet** button after previewing the report to standard screen (preview of standard SSRS report).



- Option 2: Use the **Load from catalog** tile within the **Lasernet Essentials** workspace.

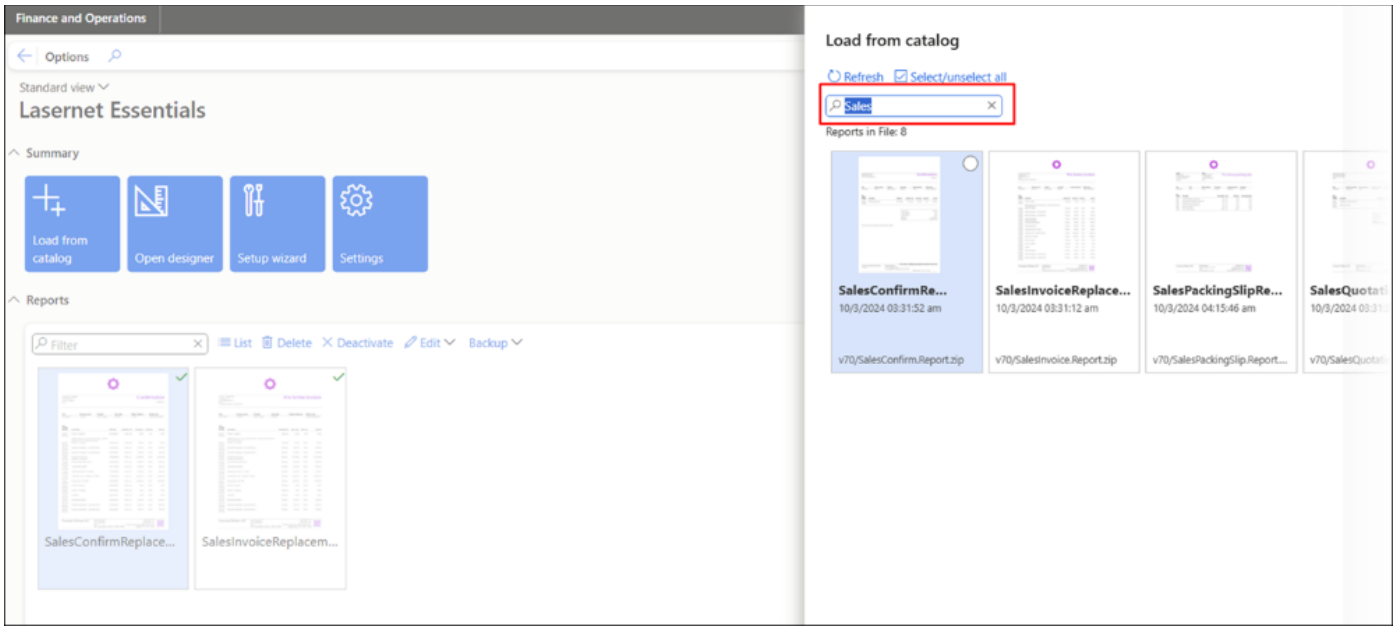


The **Load from catalog** feature enables the configuration (import) of several reports in the same run.

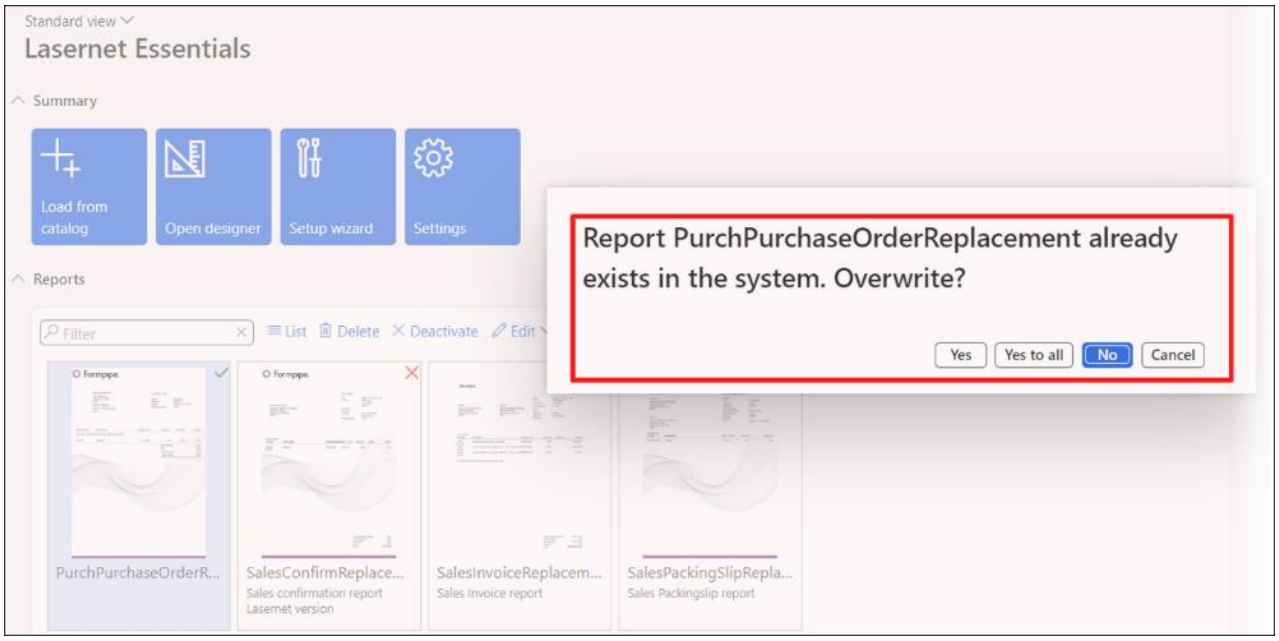


Note

A search field has been introduced to load reports from the catalog. This feature is useful for task recordings within Dynamics 365 Finance and Operations.



The following prompt is displayed if a report already exists:

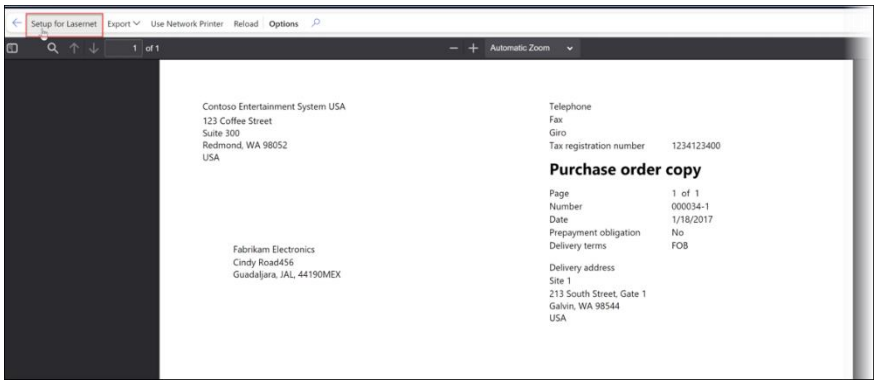


- **Yes**: Overwrite report
- **Yes to all**: Overwrite all reports (multiple)
- **No**: Do not overwrite report
- **Cancel**: Do not overwrite any reports (multiple)

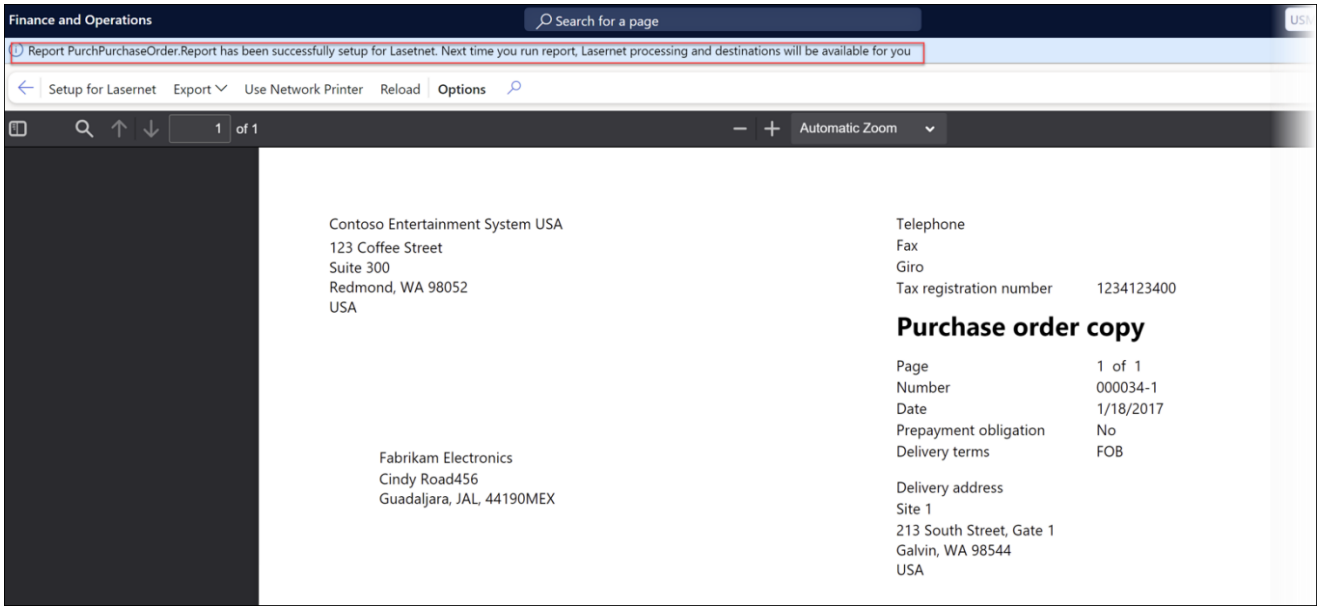
Once configured, it is possible to select Lasernet as a destination.

The embedded solution will come with 13 reports preloaded, but if you cannot see any reports or you have deleted a report and want to add it back, follow these steps:

1. Run the SSRS report you want to (re)add.
2. Once you see the report on your screen, click **Setup for Lasernet**. This will add the report to your list.

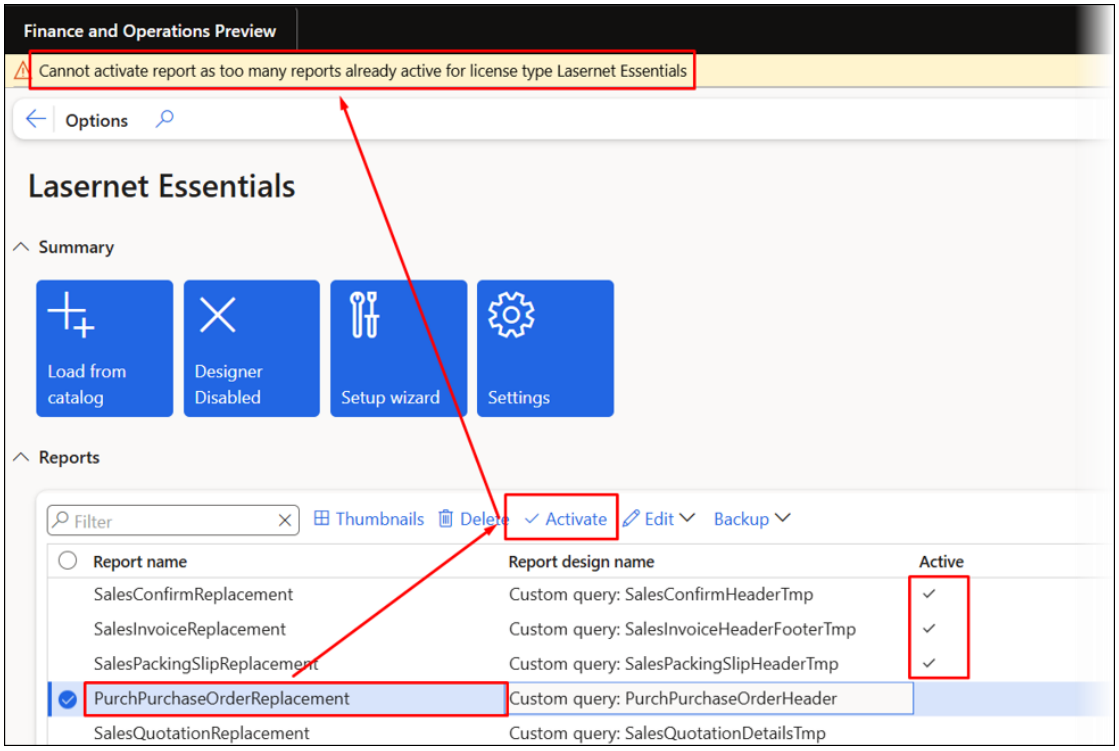


3. Look for confirmation of the import of the report.



4. Run the report again as a Lasernet report, generate the XML, and prepare it for form design.

You are limited to activating three reports among the 13 standard reports we provide with the embedded solution (no custom Query). Once you activate the fourth report, you will get an error message informing you that report processing has slowed down.



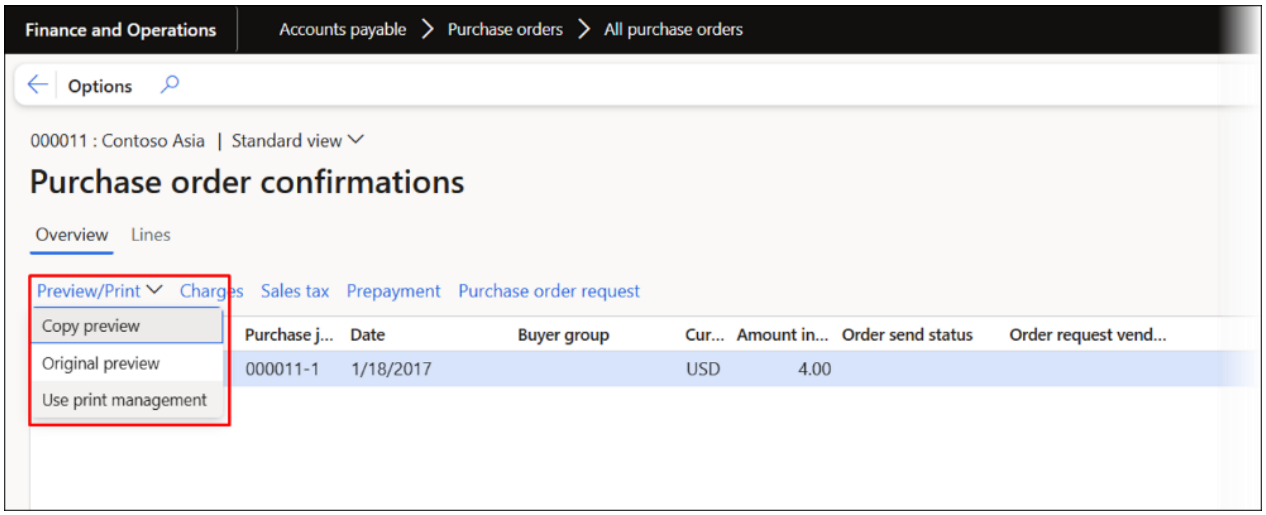
You can pick any report and start designing by clicking **Open designer**.

5.1.1.1 Configure a Report in a Standard Journal

Additionally, you can set up Lasernet reports within any of the standard journals in Dynamics 365 Finance and Operations.

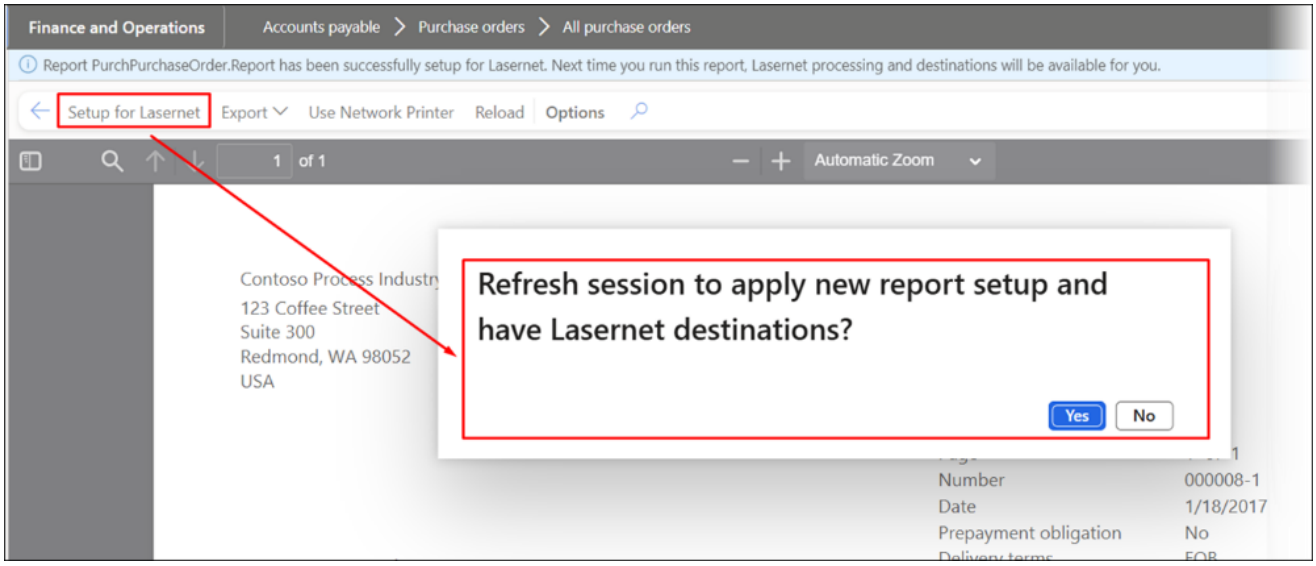
1. Select a standard destination to preview the report.

The end-user must have either the role of System Administrator or Lasernet Administrator.

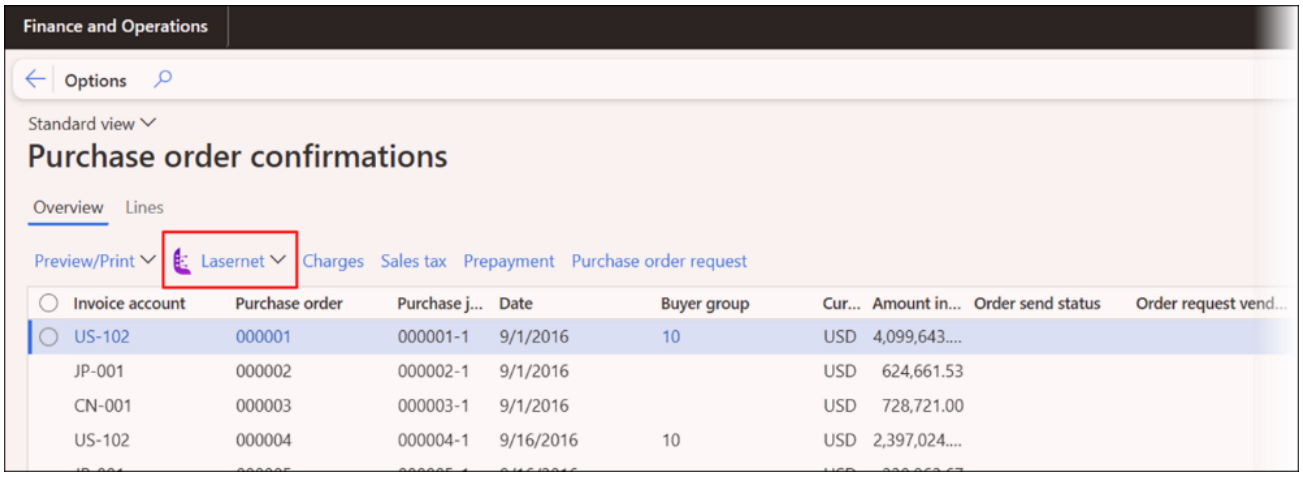


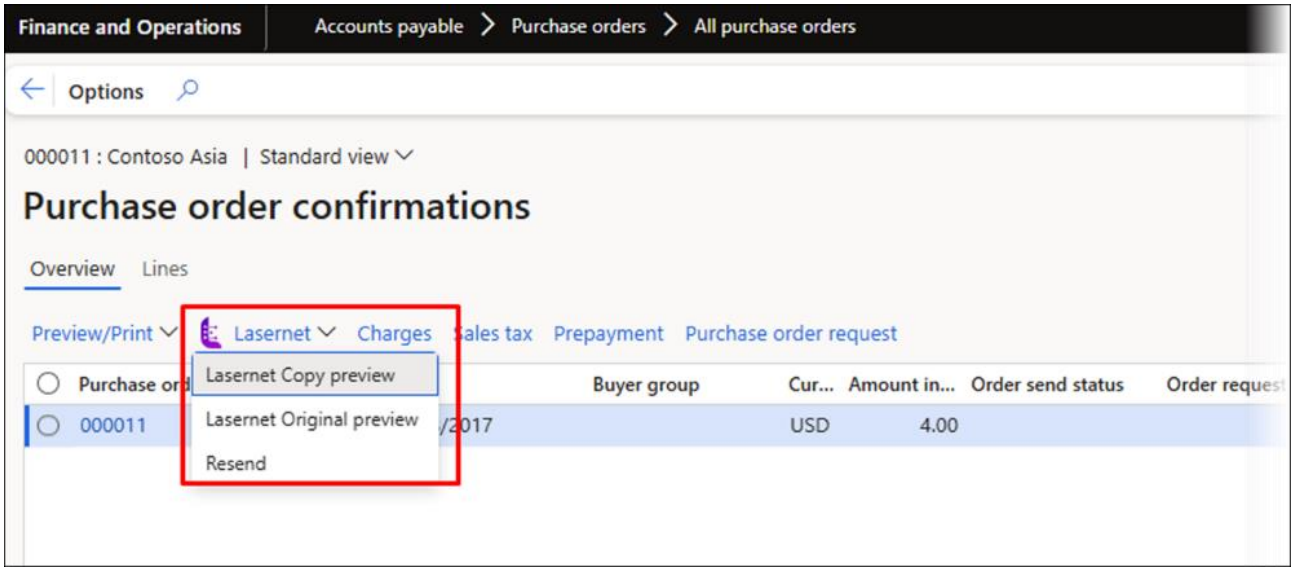
2. Click **Setup for Lasernet** within the report **Preview**.

A refresh is needed when the report is set up from a journal but not if it is configured through a printer dialog, such as when posting packing slips or invoices.



The following menu is shown after the session has been refreshed:





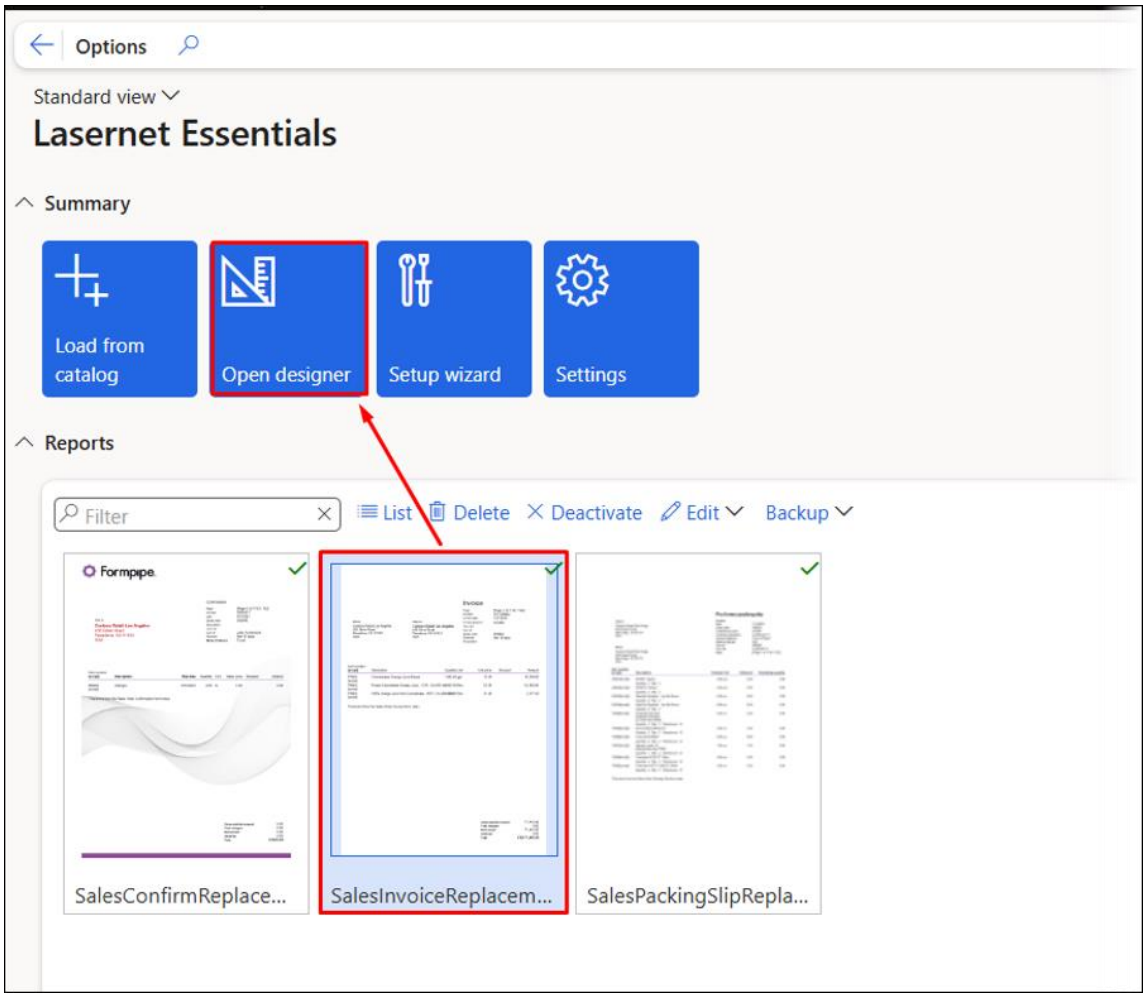
5.1.2 Open Designer - Lasernet Form Editor

To start developing, highlight one of your active or inactive reports and click **Open designer**.

Open designer will open the Lasernet Form Editor, where you will be able to adjust the design for the selected report.

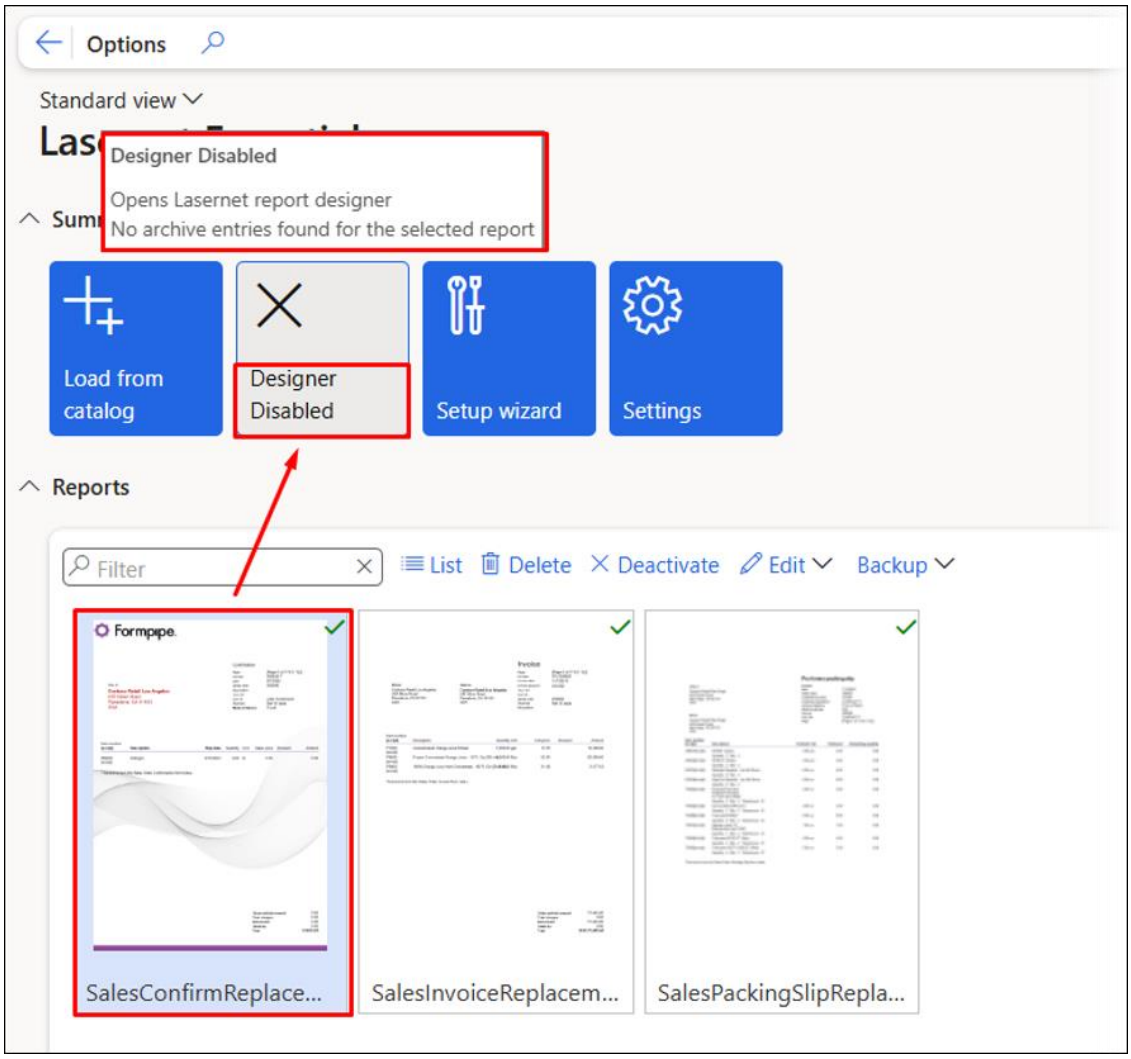
When launching the Form Editor, the system will indicate if an XML/Grab file is missing from the report. A single archive entry will be provided for each Formpipe default report.

It is possible to open the designer from either the **Preview** of a report or within the workspace.



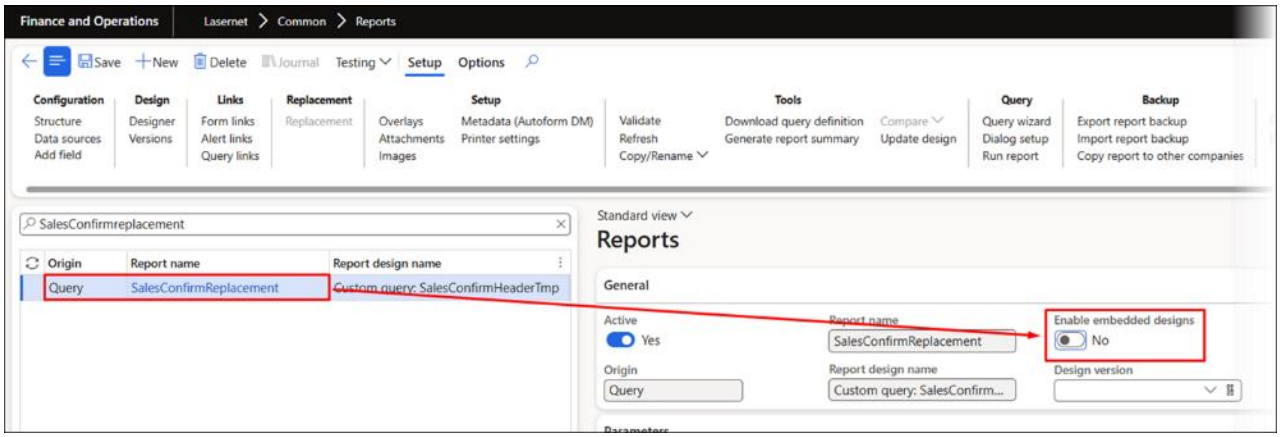
The **Open designer** button works only if you have run the report you wish to design at least once.

The button will read **Designer Disabled** in case no entry for the report is found within the **Lasernet Archive** (this information is displayed when positioning your mouse pointer over the button).

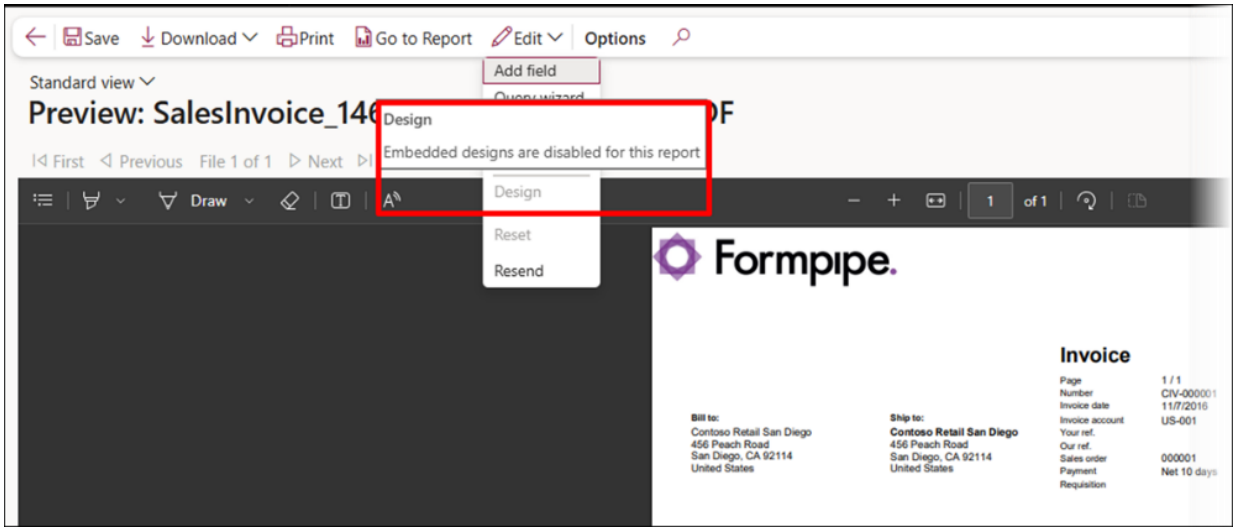


If you have not run your report, run it to **Lasernet screen** and open the Form Editor directly from that screen.

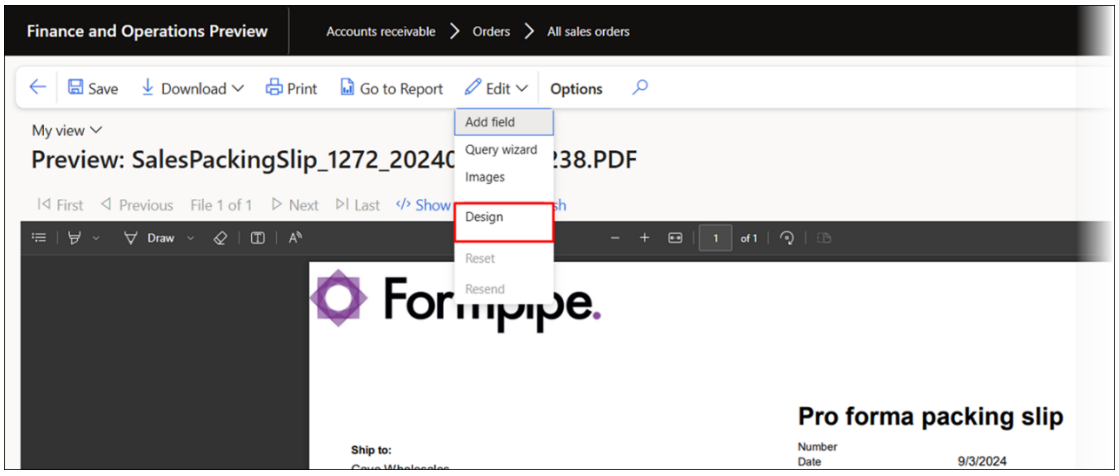
The **Designer Disabled** button is also displayed if the selected report does not use an embedded design, such as in a hybrid setup where some reports use Lasernet Essentials while others use Lasernet Professional or Enterprise.



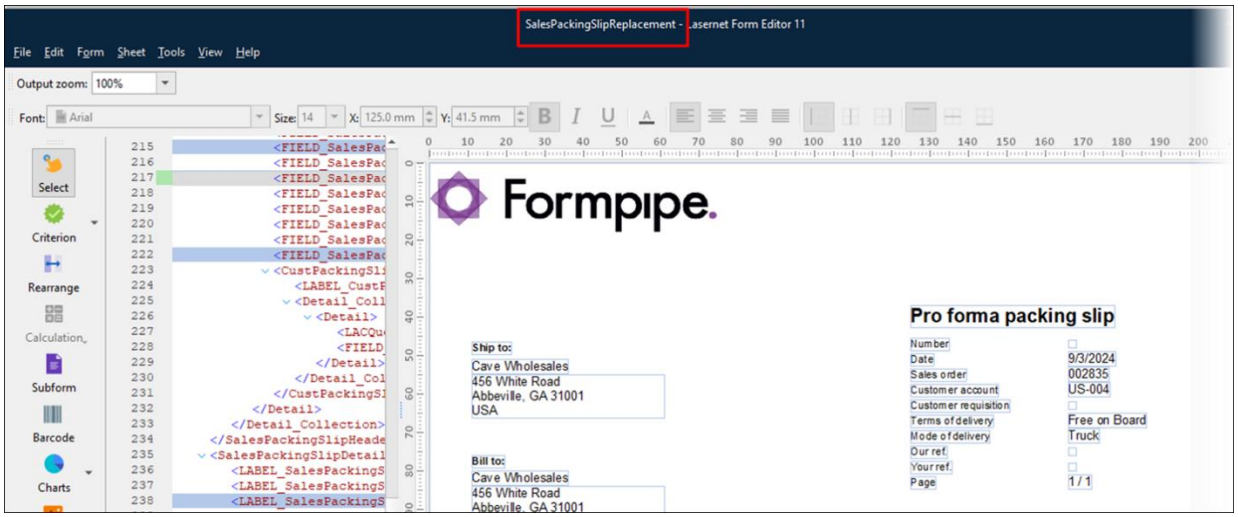
The **Design** option is also disabled within the report **Preview** if the **Enable embedded designs** button is toggled to the **No** status and no entry exists within the **Archive**.



Otherwise, it is possible to open Lasernet Form Editor from the report **Preview**.



The report name will appear at the top of the Lasernet Form Editor window when the designer is opened from either the **Preview** or the workspace.

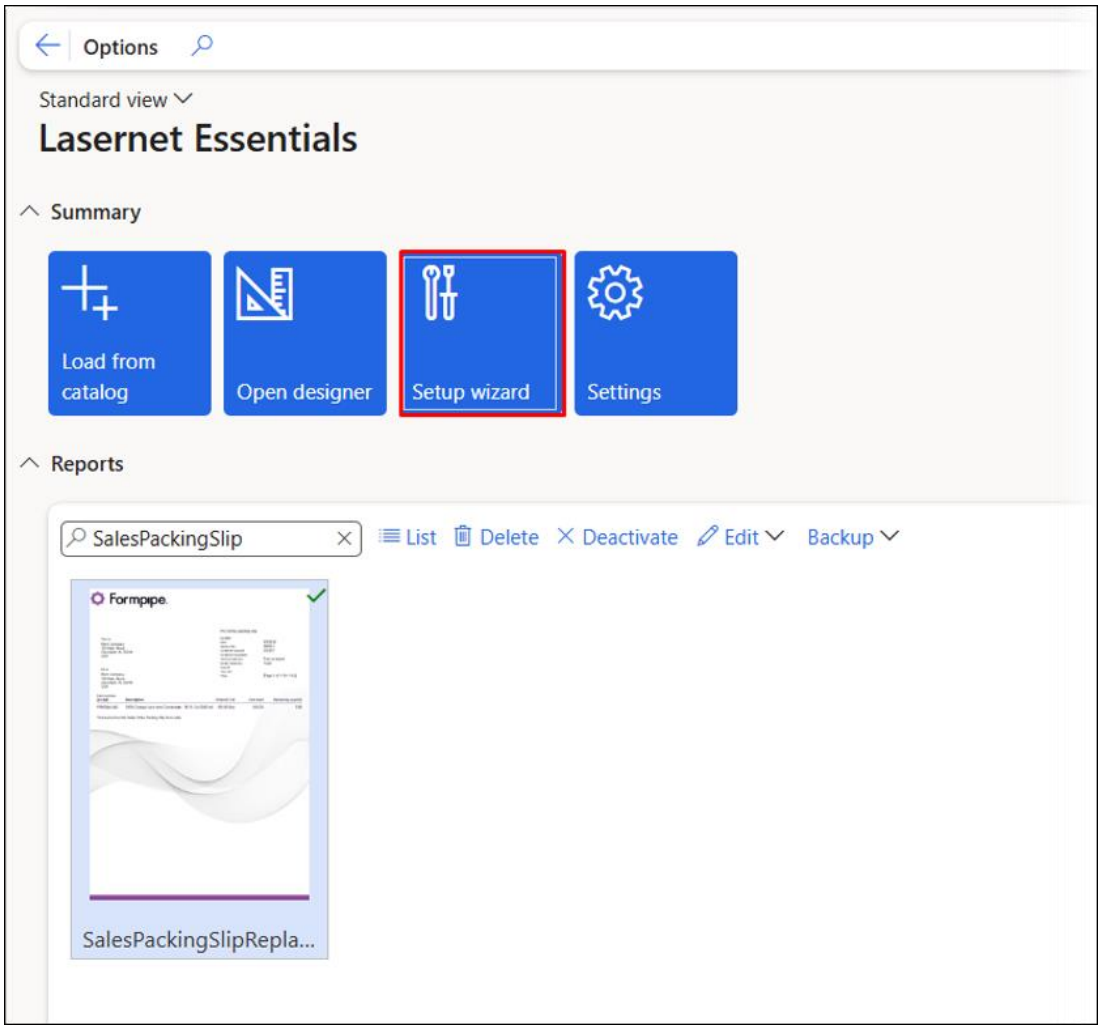


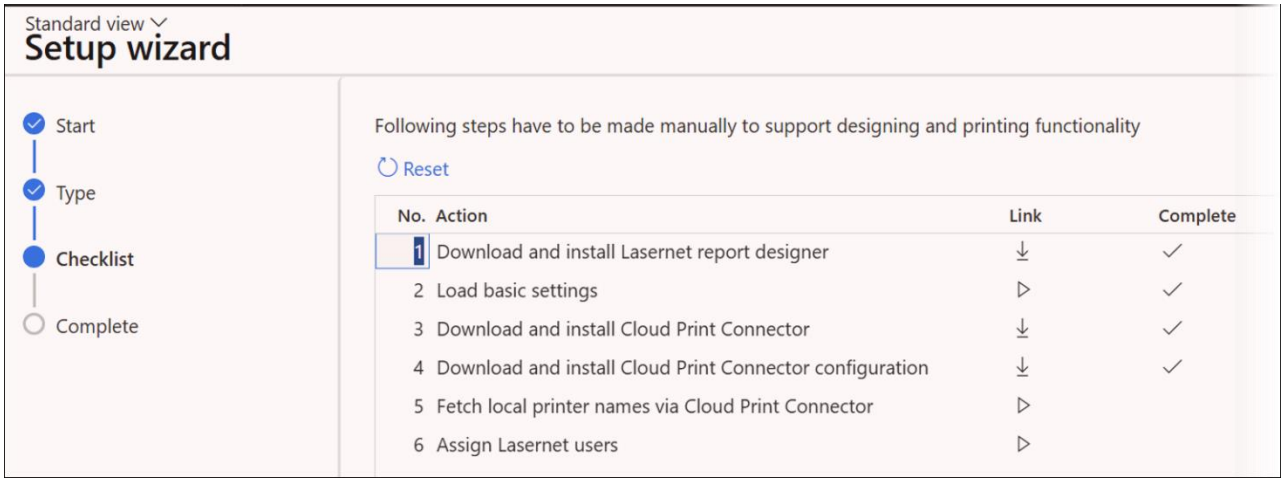
If no data is shown when opening the designer, ensure that the report is run from its original location. Generating the report from its initial location will help ensure that data is available the next time the designer is accessed from the workspace.

5.1.3 Setup Wizard

The **Setup wizard** is a quick guide for getting you set up and configured with default settings, Cloud Print Connector, and downloading the Lasernet Form Editor for form design.

It is valid for both Lasernet Essentials and Lasernet Professional (if a valid license has been entered).



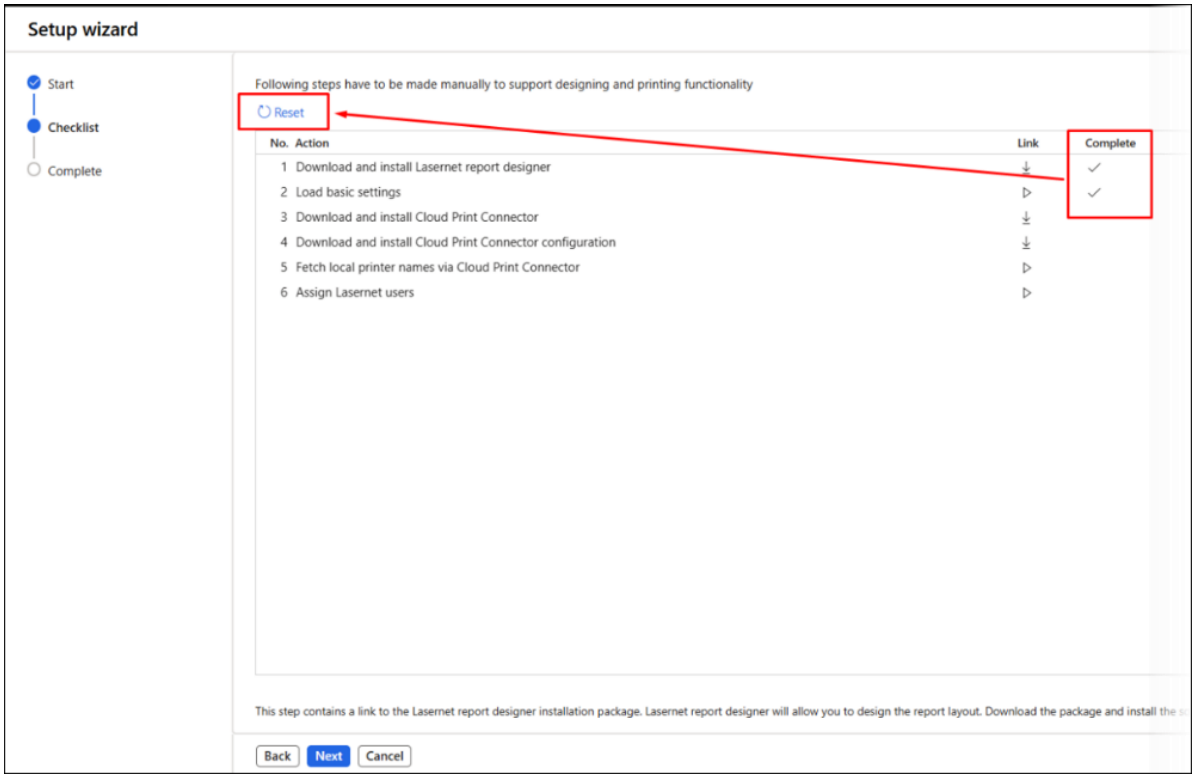


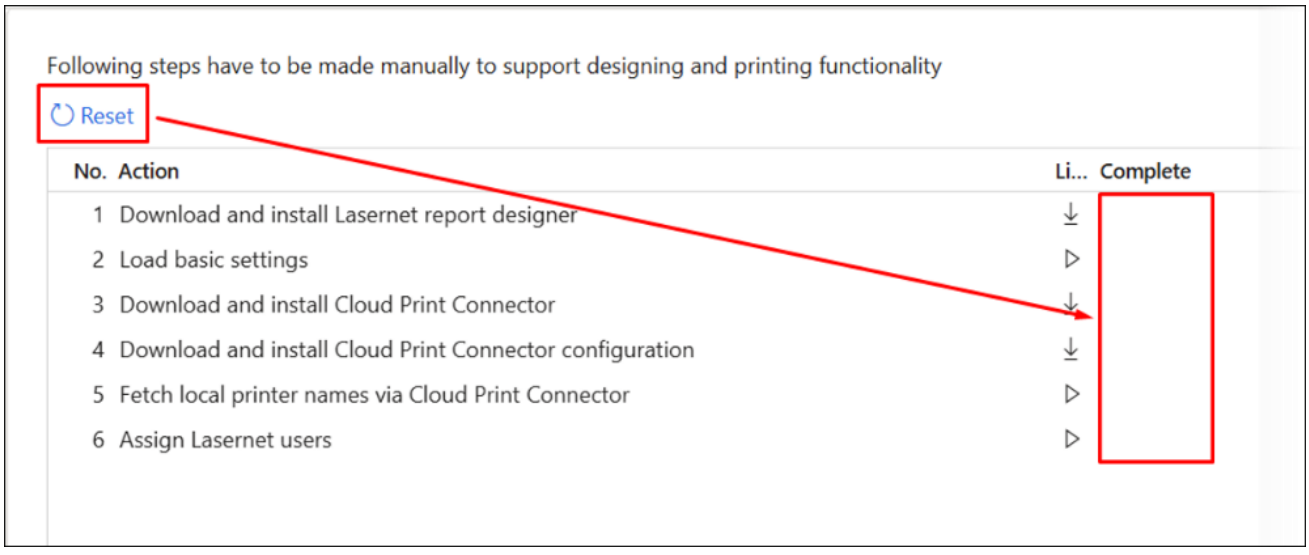
Follow the checklist from **Action No.1** to **Action No.6** to get started quickly and efficiently.

You can skip the Cloud Print Connector installation, but you will need the **Lasernet report designer** (Form Editor) and to **Load Basic Settings** (our default configuration for the free version).

Once you are ready to install and configure the Cloud Print Connector, return to this menu and download the client and the configuration.

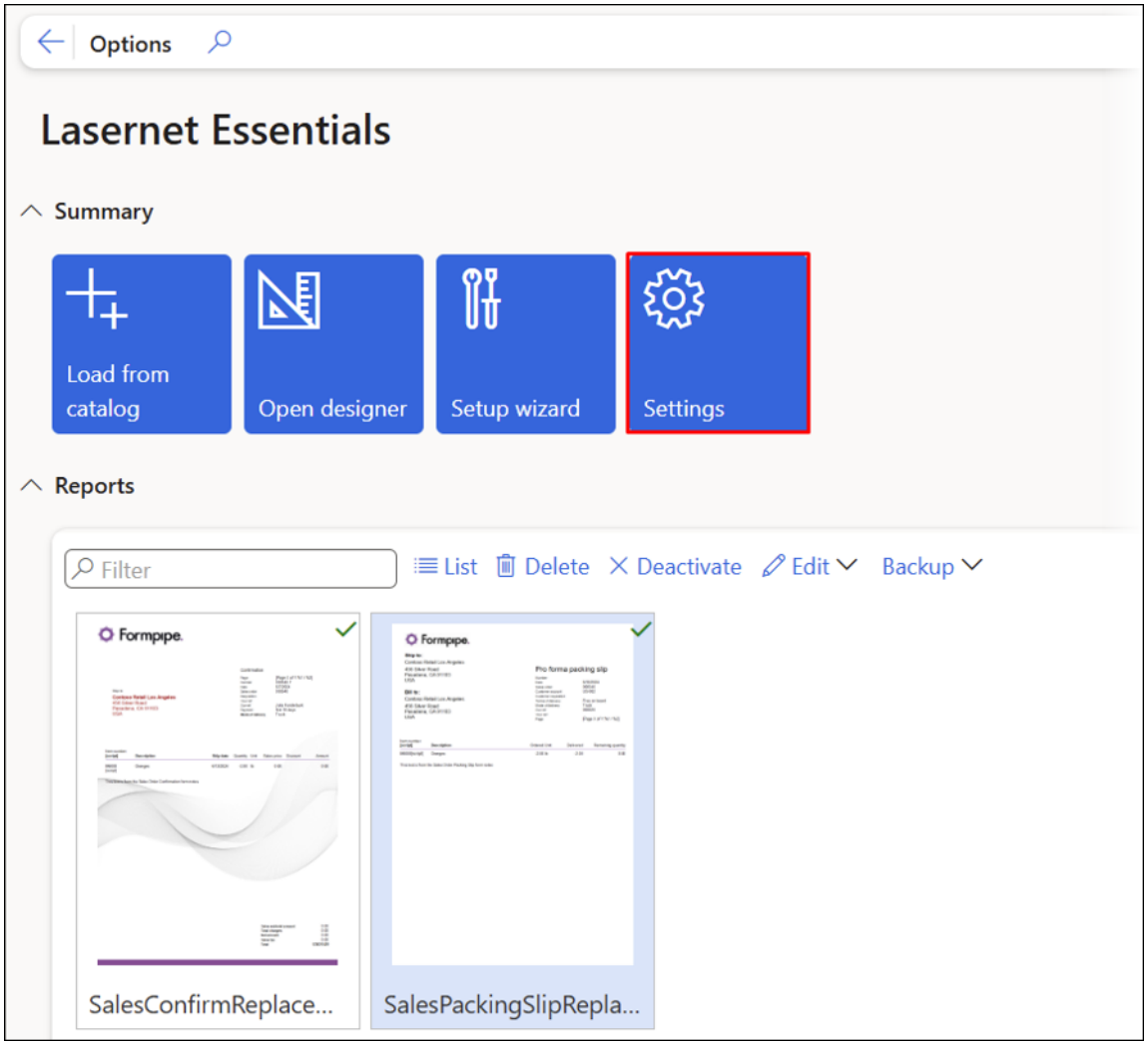
The **Complete** checkmark indicates that a step has been completed, but it is possible to use the **Reset** button to remove all checkmarks.





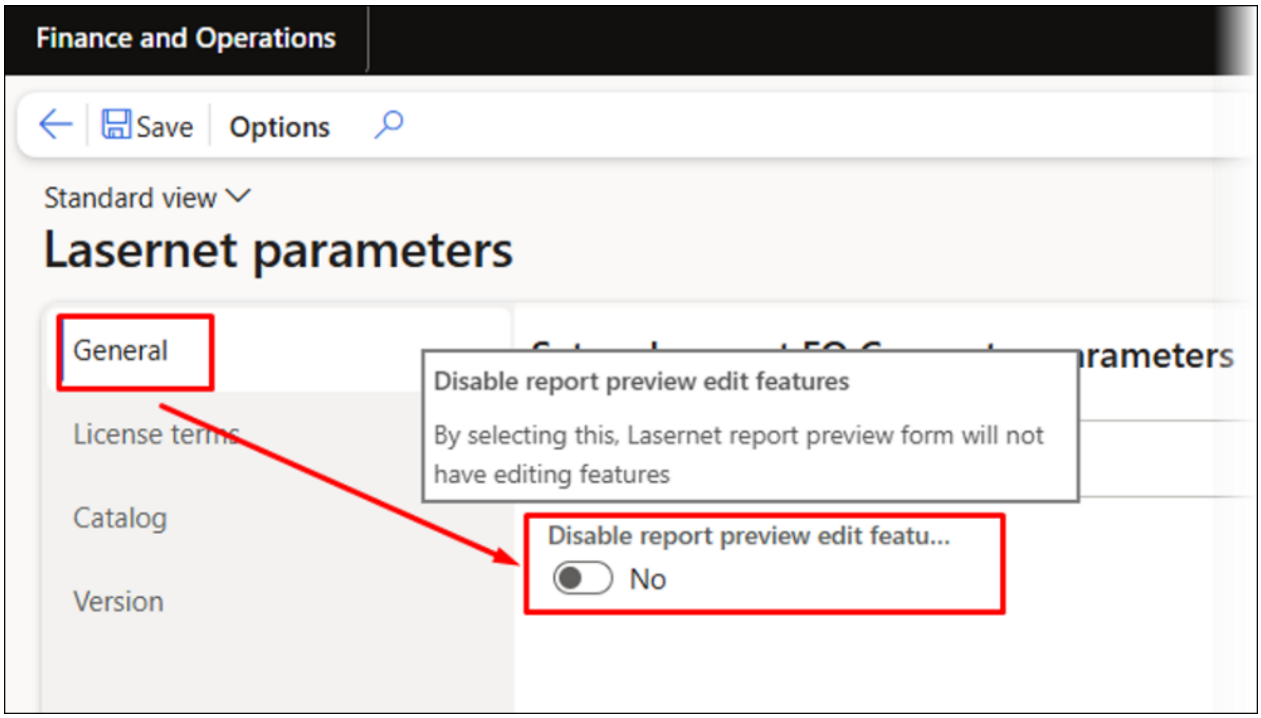
5.1.4 Settings

Click the **Settings** button to access the **Lasernet parameters** page.

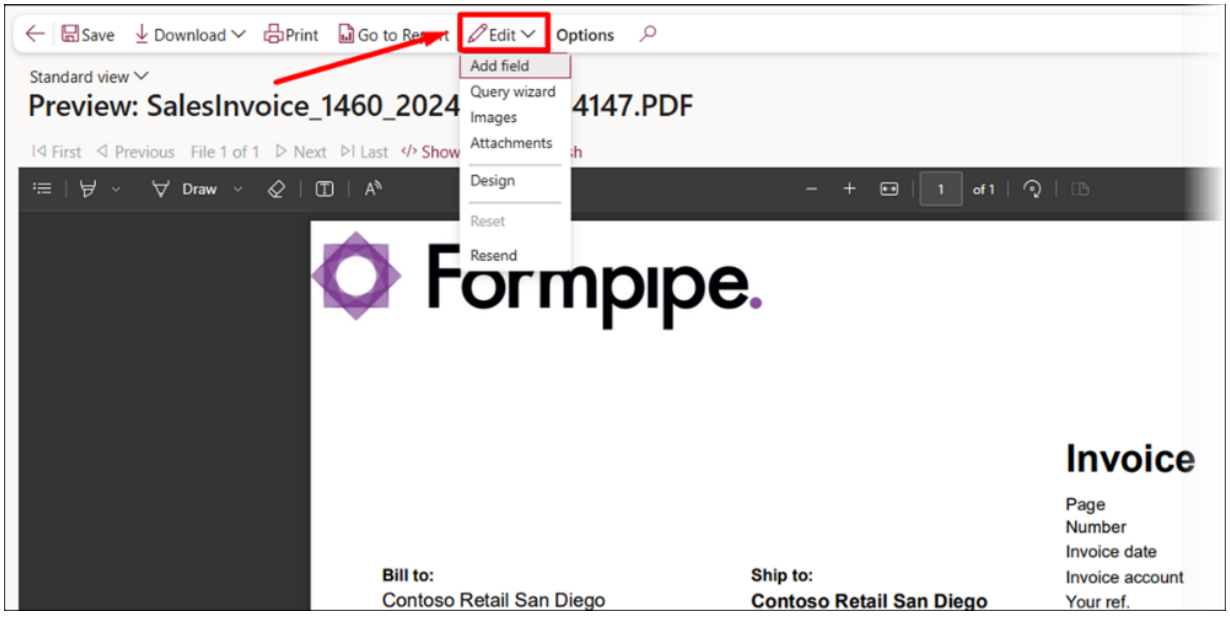


5.1.4.1 General

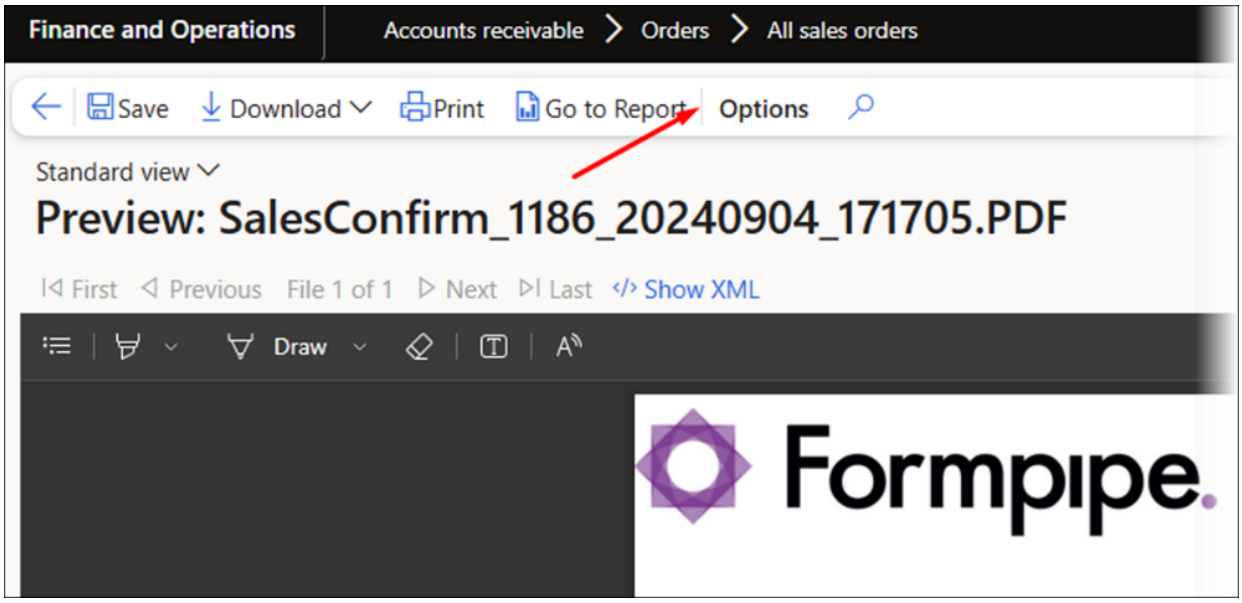
From the General tab of the **Lasernet parameters** page, you can prevent the **Edit** button from appearing in a report **Preview** by toggling the **Disable report preview edit features** button to the **No** status.



Normally, the **Edit** button is shown in the report **Preview** if the user has the role of either System Administrator or Lasernet Administrator.

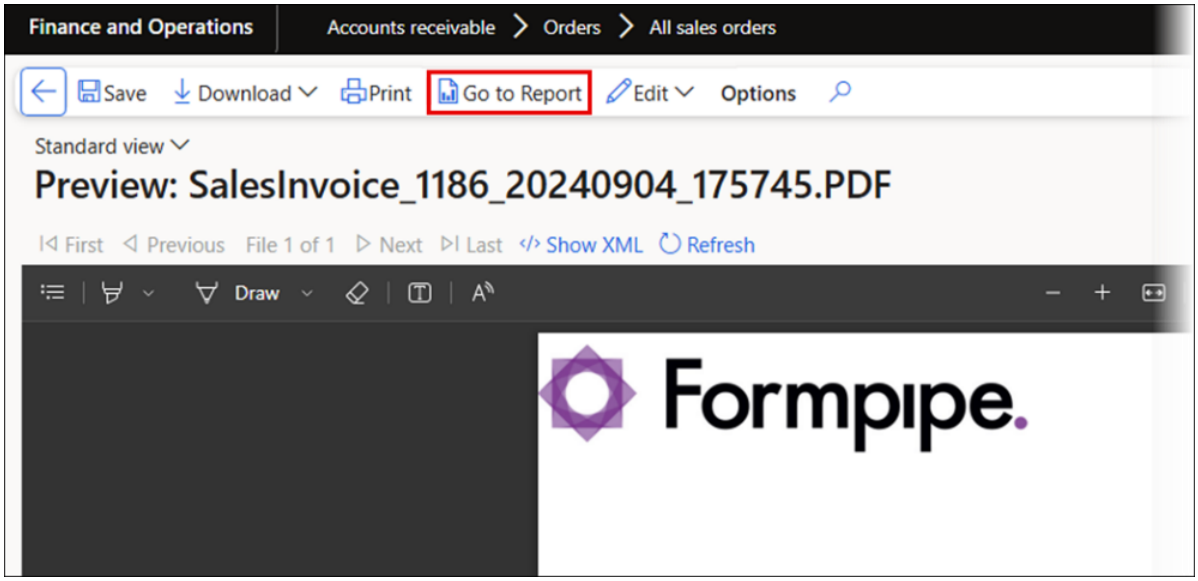


The **Disable report preview edit features** option will hide the **Edit** button and the features located within its dropdown menu.



Note

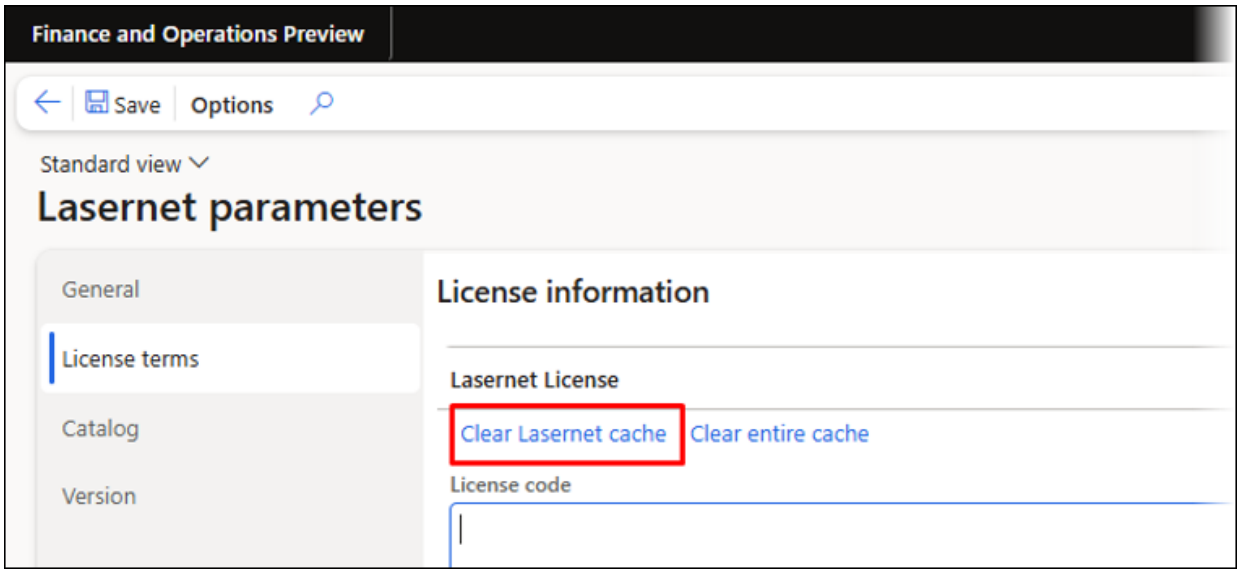
The **Go to Report** button in the report **Preview** will open the report within the workspace.



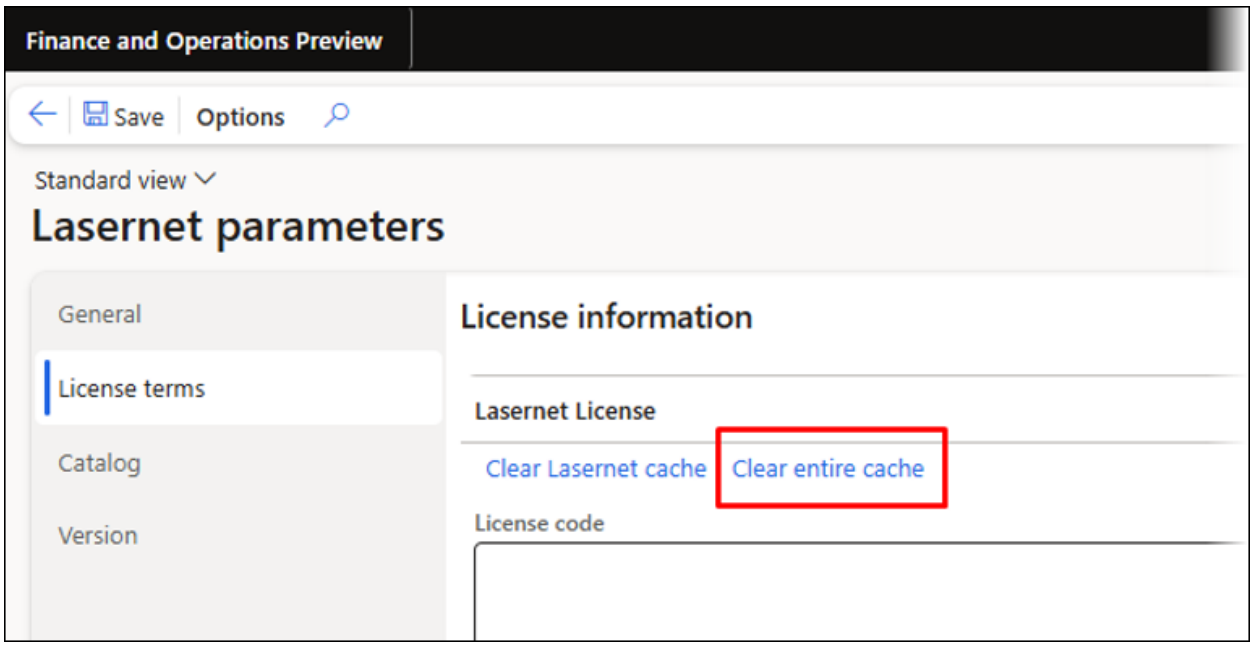
5.1.4.2 License Terms

The **Clear Lasernet cache** function can be found in the **License terms** tab of the **Lasernet parameters** page. This function removes stored information about tables and fields within the environment. It can be used whenever new tables or fields are added.

Using **Clear Lasernet cache** will not interrupt any user sessions.



It is also possible to clear all caches (data, AOT) within Dynamics by using the **Clear entire cache** button. However, this might interrupt other sessions.



The embedded version ships and installs as the free version. The presence of a **License code** determines whether you are using a free or professional/enterprise version of the embedded solution.

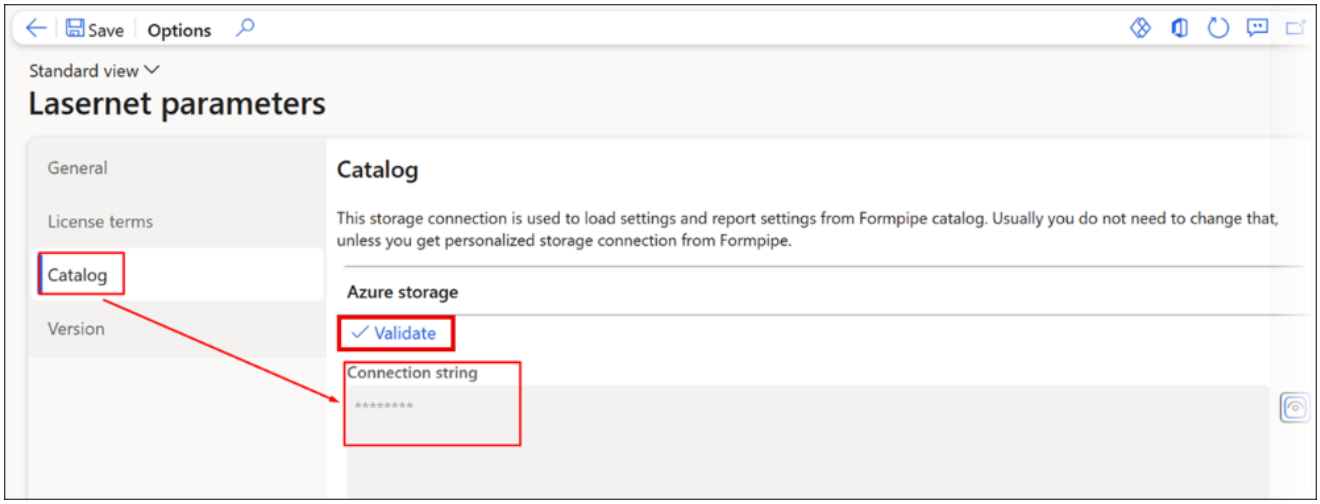
Click the **Save** button after either entering a **License code**, as this will ensure that the **Lasernet** module is visible within the **Modules** list.

The **Save** button will also ensure that the **Lasernet** module is hidden if no valid **License code** is entered.

5.1.4.3 Catalog

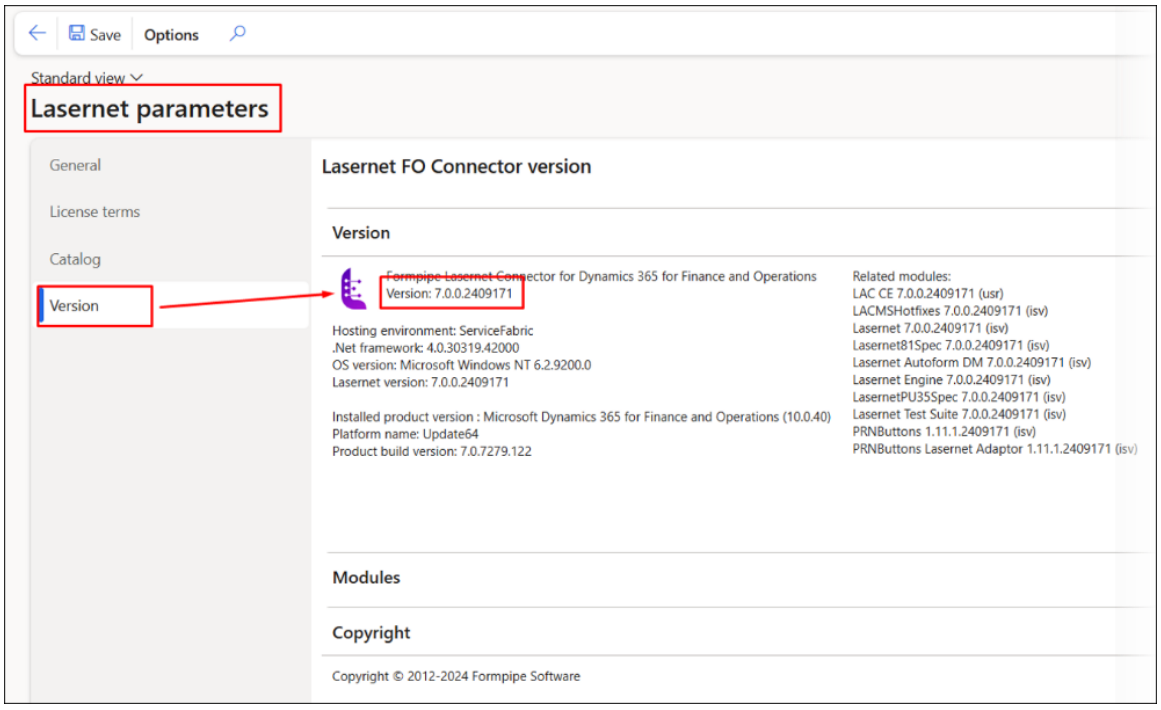
The **Catalog** tab **Connection string** includes an optional link for loading basic settings and configuring reports. This is a useful feature for sharing environment settings and report configurations. Formpipe Partners can also use it to distribute their default configuration.

You can validate the connection to the Azure Storage account by clicking the **Validate** button.

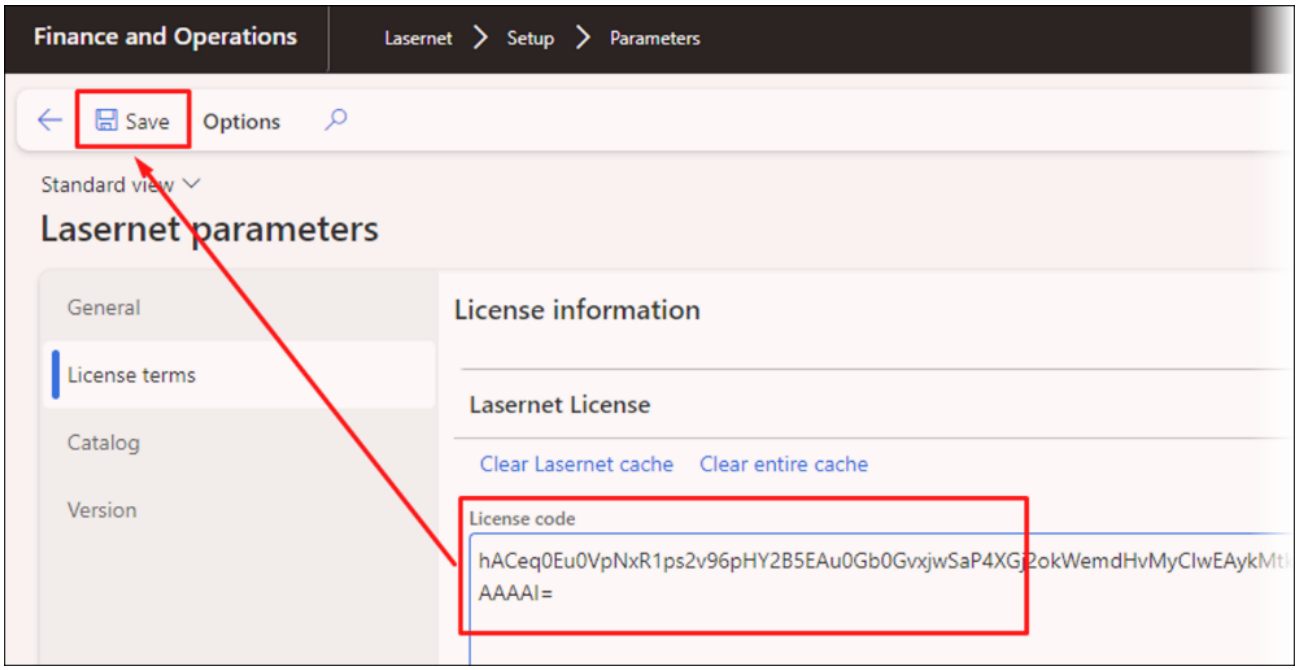


5.1.4.4 Version

The **Version** tab includes details regarding the environment and installed software versions.

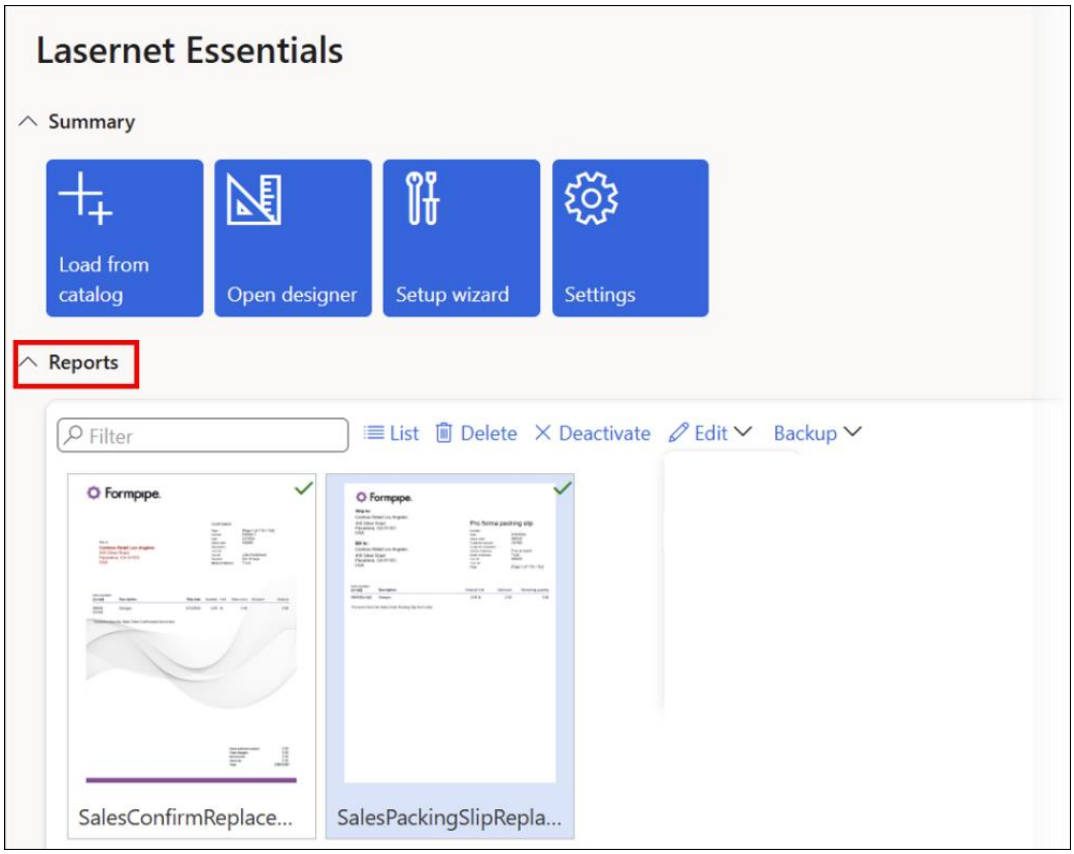


To enable Lasernet Professional, input a valid **License code** and click **Save**. This will refresh the session, incorporating the **Lasernet** module in the main menu.



5.2 Reports

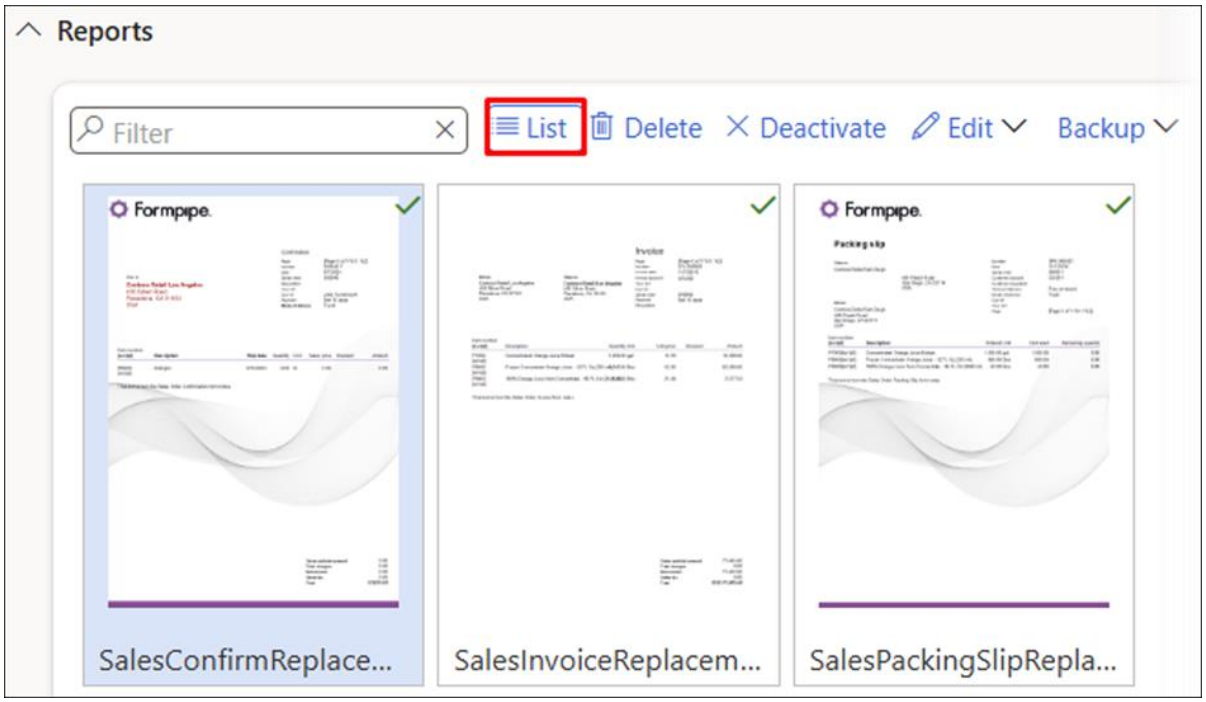
The lower half of the **Lasernet Essentials** workspace enables users to work on their **Reports**.



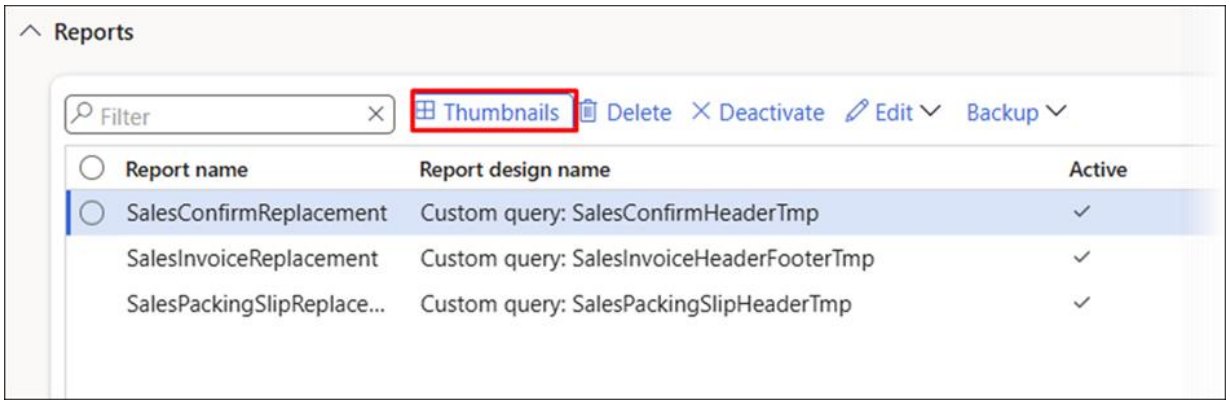
5.2.1 List/Thumbnails

It is possible to toggle between **Thumbnails** or **List** view to accommodate the user's preference.

The **Thumbnails** view shows the first-page design of the report as a thumbnail. Active reports are marked by a green checkmark, inactive reports are marked by a red x.



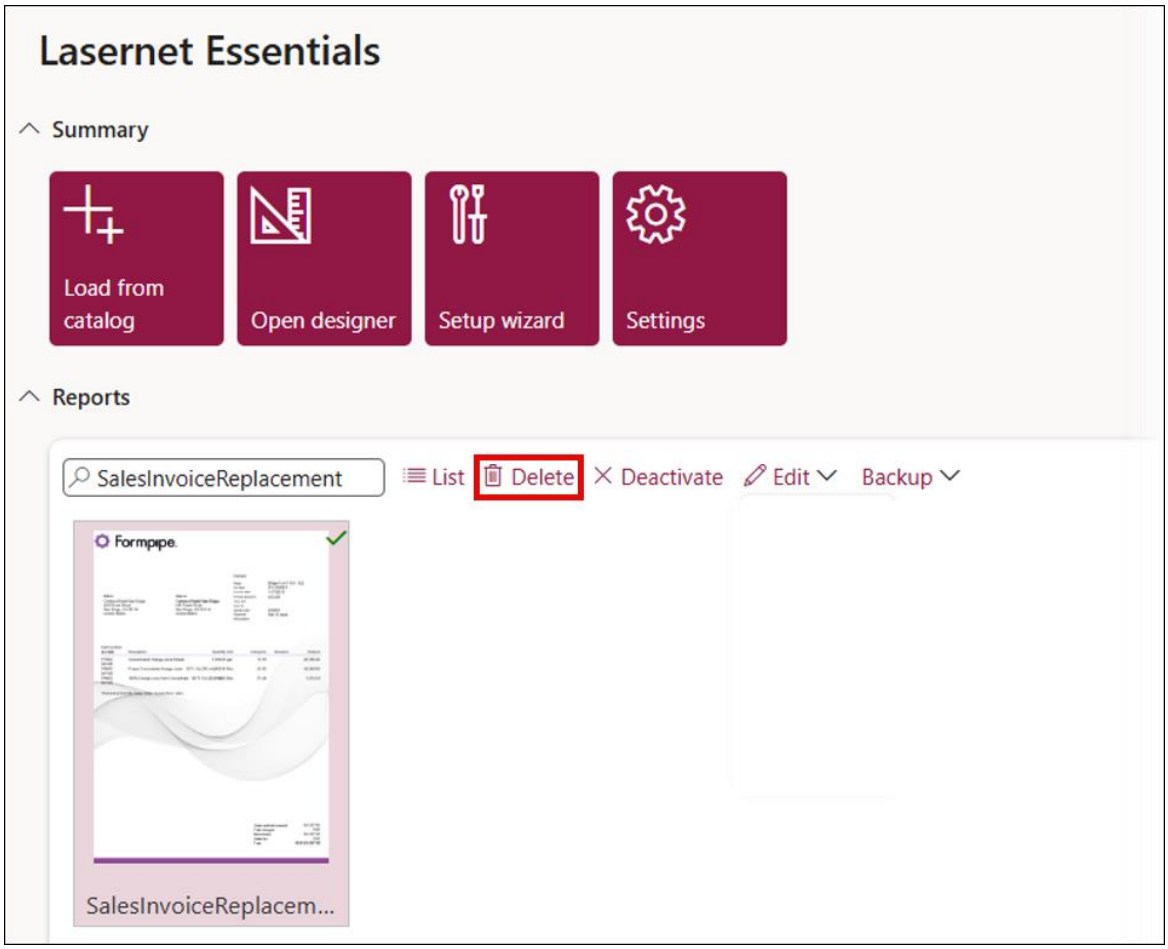
The **List** view shows all loaded reports as a list. Active reports are marked by a checkmark, which will not be present in inactive reports.



Moreover, the List view allows multi-selection, letting users export or manage multiple reports at once. You can also select and delete several reports simultaneously.

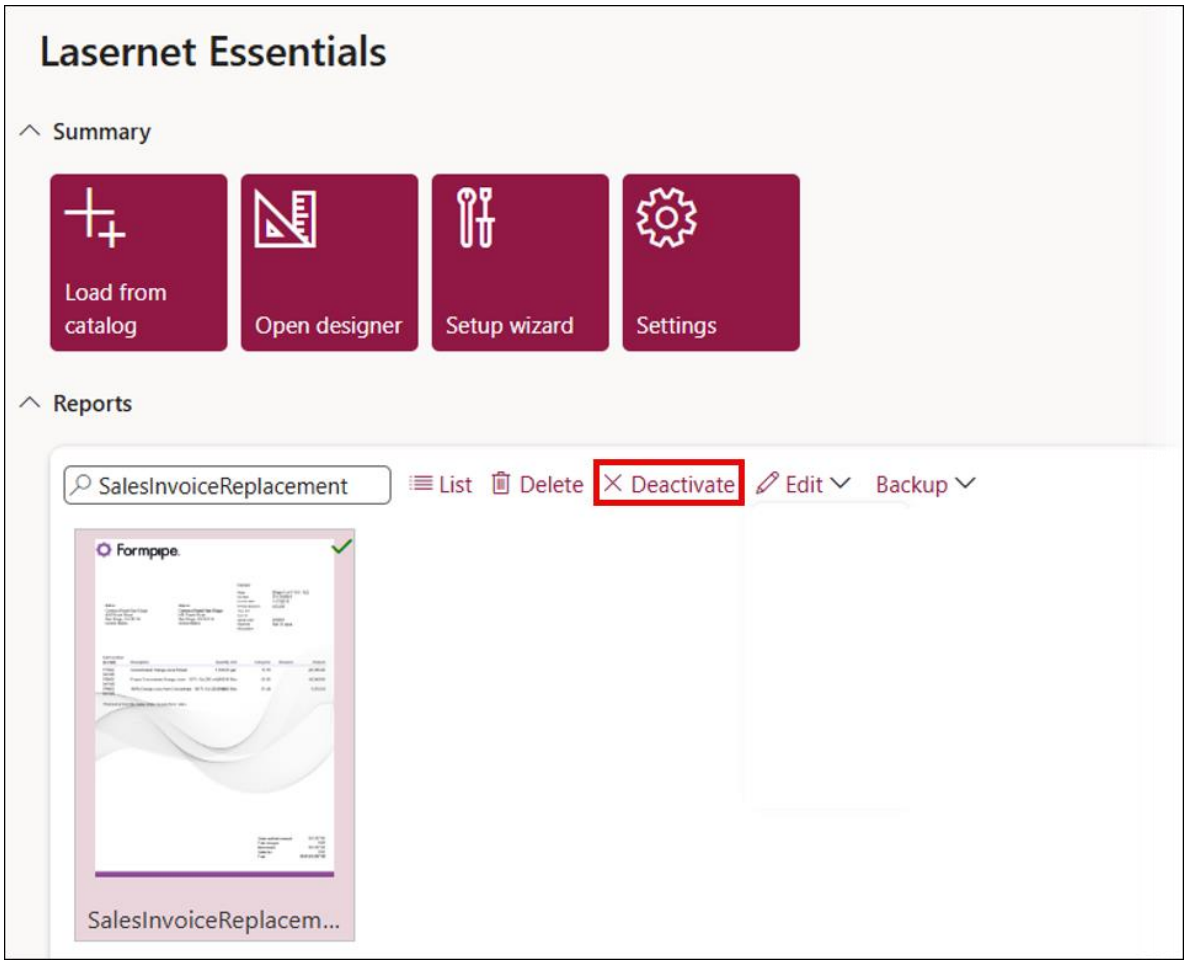
5.2.2 Delete

It is possible to delete one report at a time. Select the report you wish to delete and click the **Delete** button.



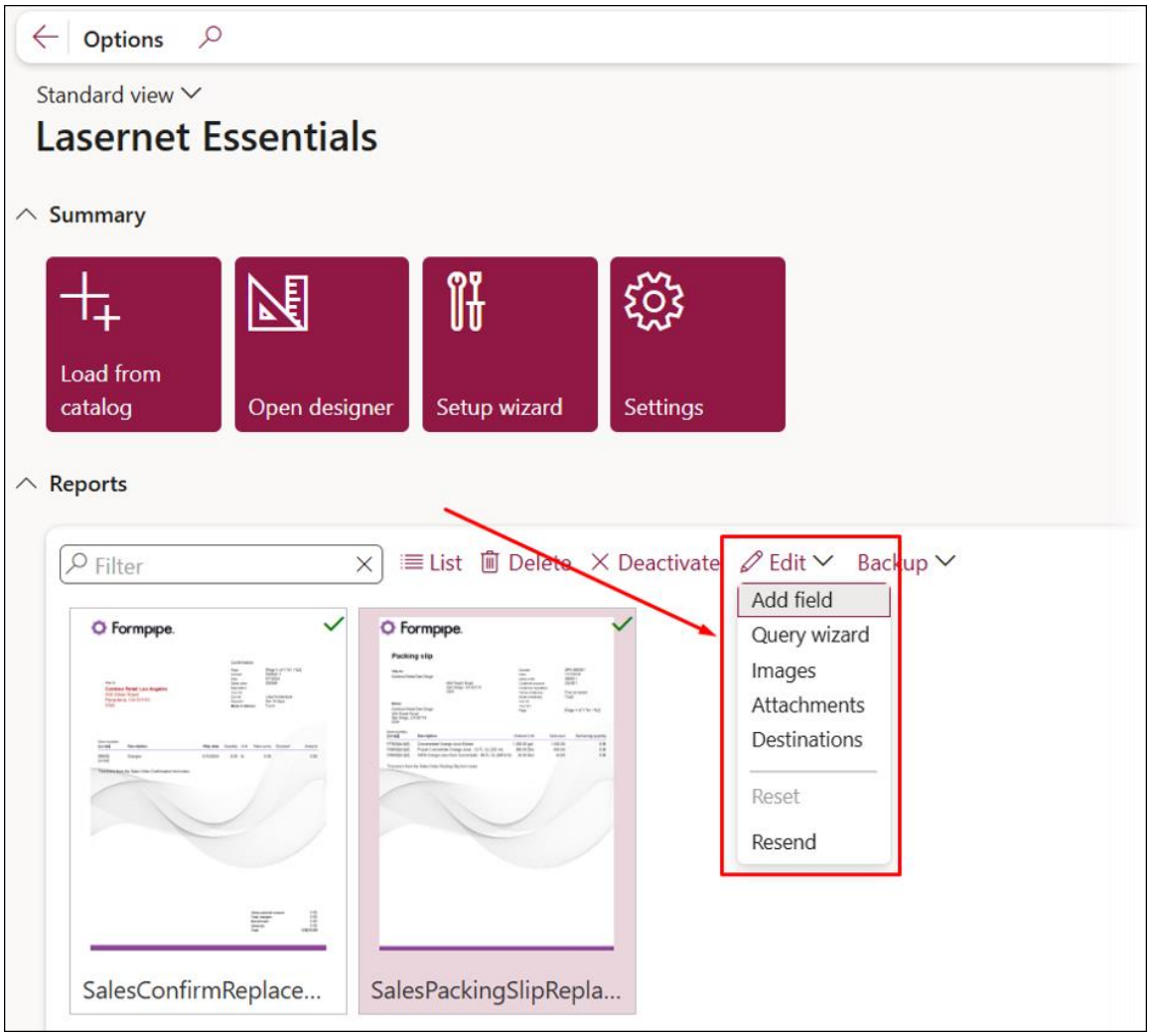
5.2.3 Activate/Deactivate

It is possible to activate or deactivate one report at a time. Select the report and click the **Activate** or **Deactivate** buttons.



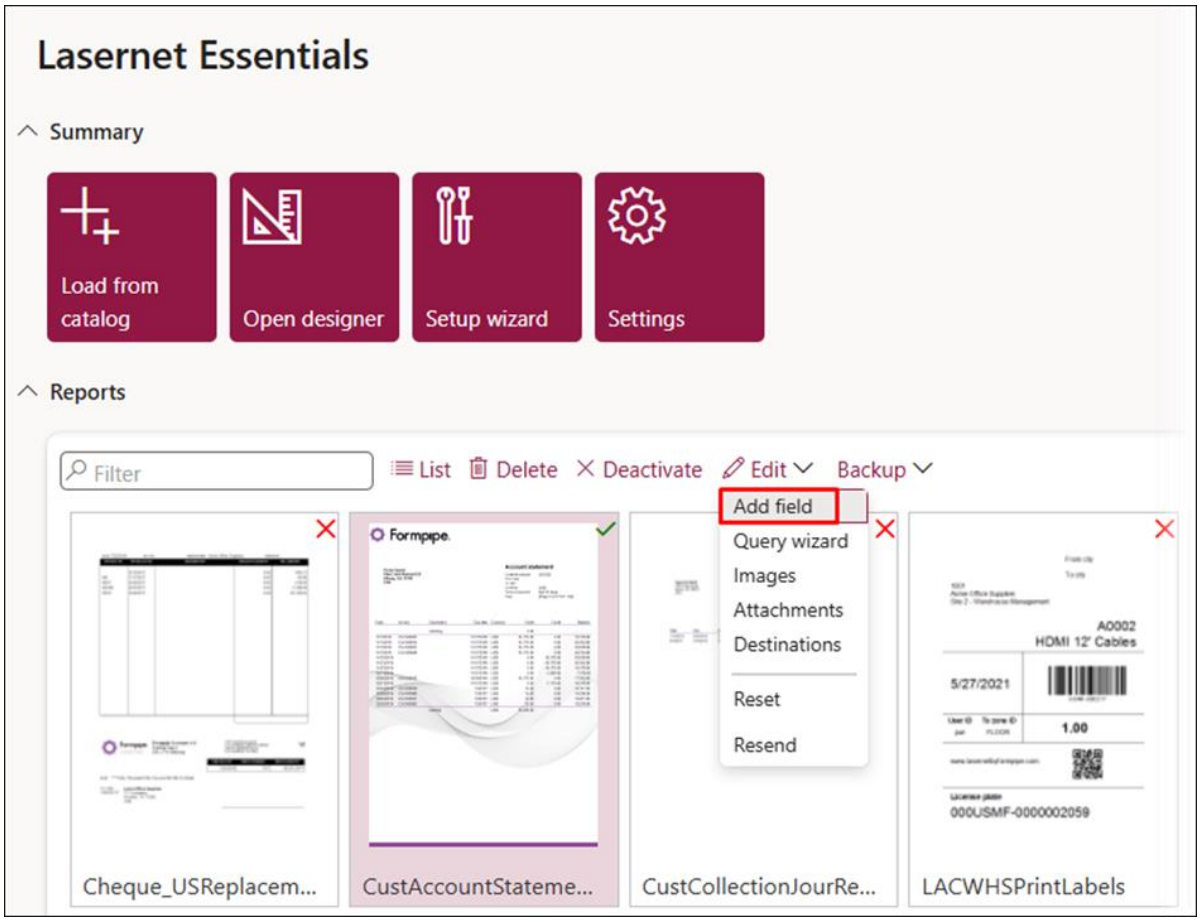
5.2.4 Edit

This section describes the functions found in the **Edit** dropdown menu.

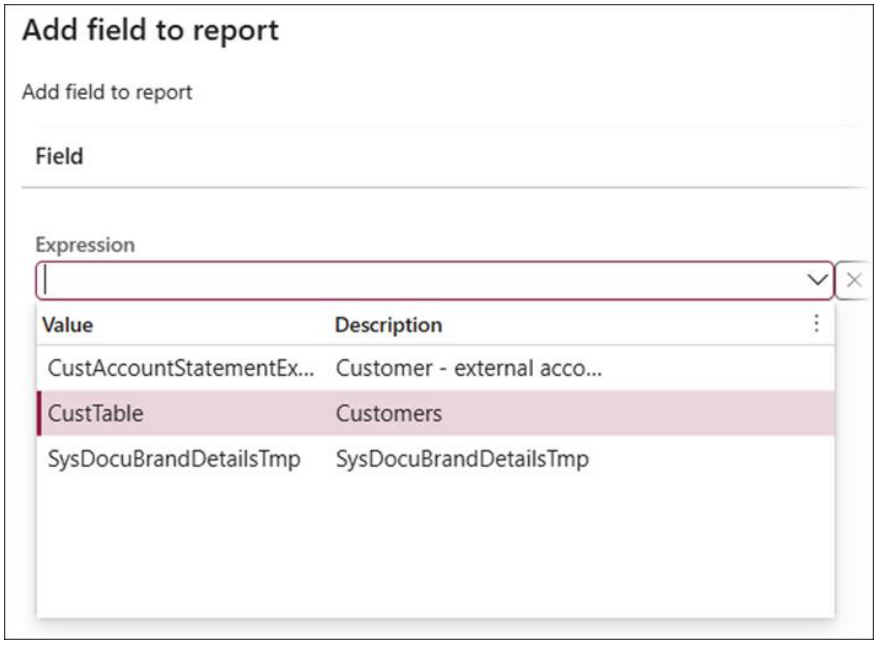


5.2.4.1 Add Field

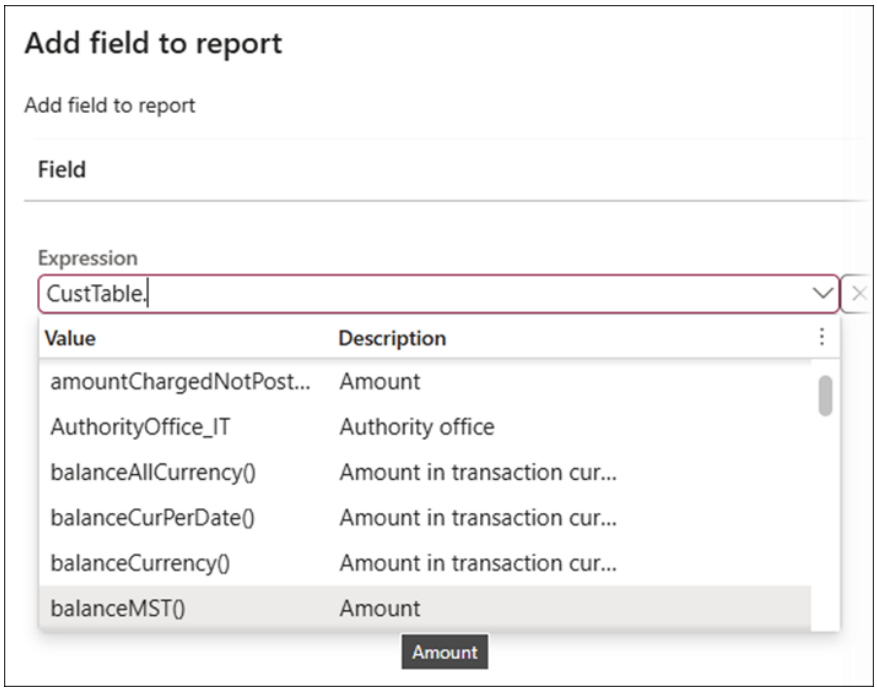
When choosing the **Add field** option, the system will display a dialog where you can first choose the desired table and then the required field to add to your selected report.



1. Choose the desired table.

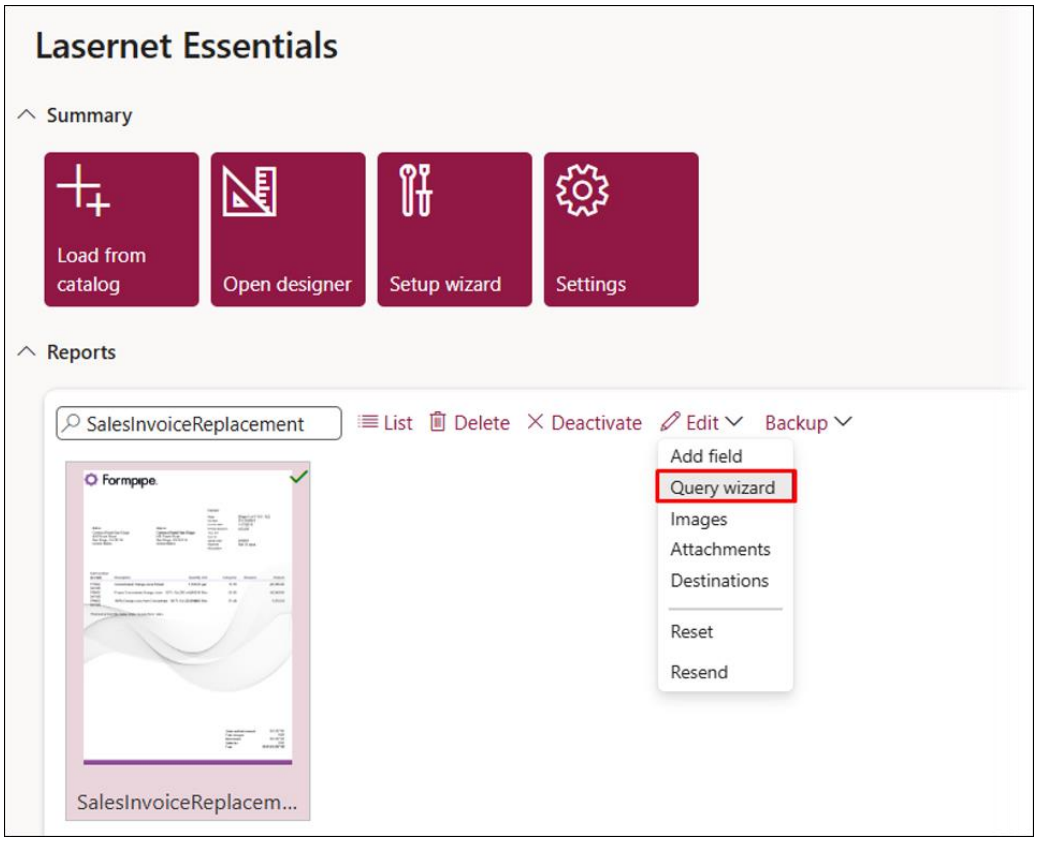


2. Choose the desired field.



5.2.4.2 Query Wizard

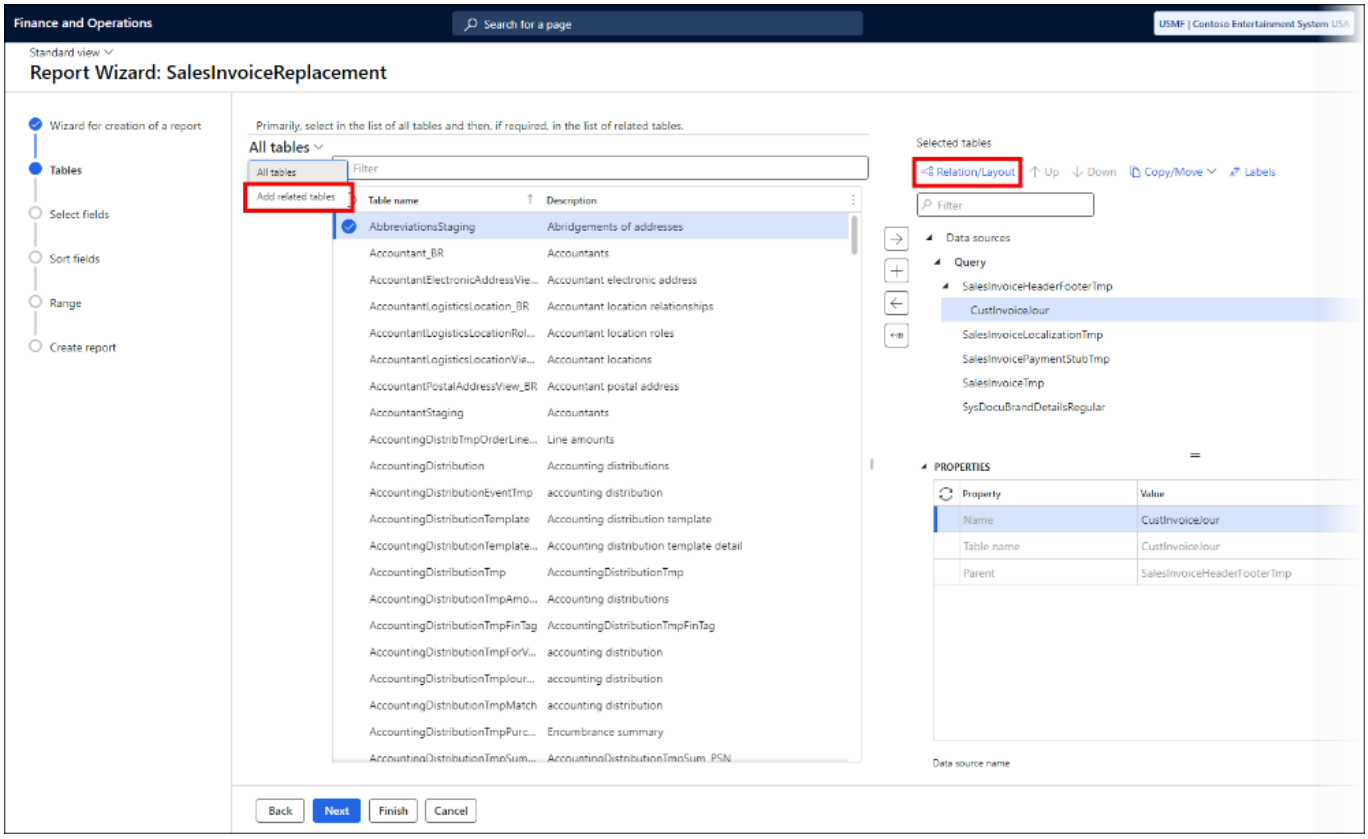
When choosing the **Query wizard** option, the system will open a wizard for the Query where the user can not only add the required tables and fields but also sort the fields and add the necessary ranges.



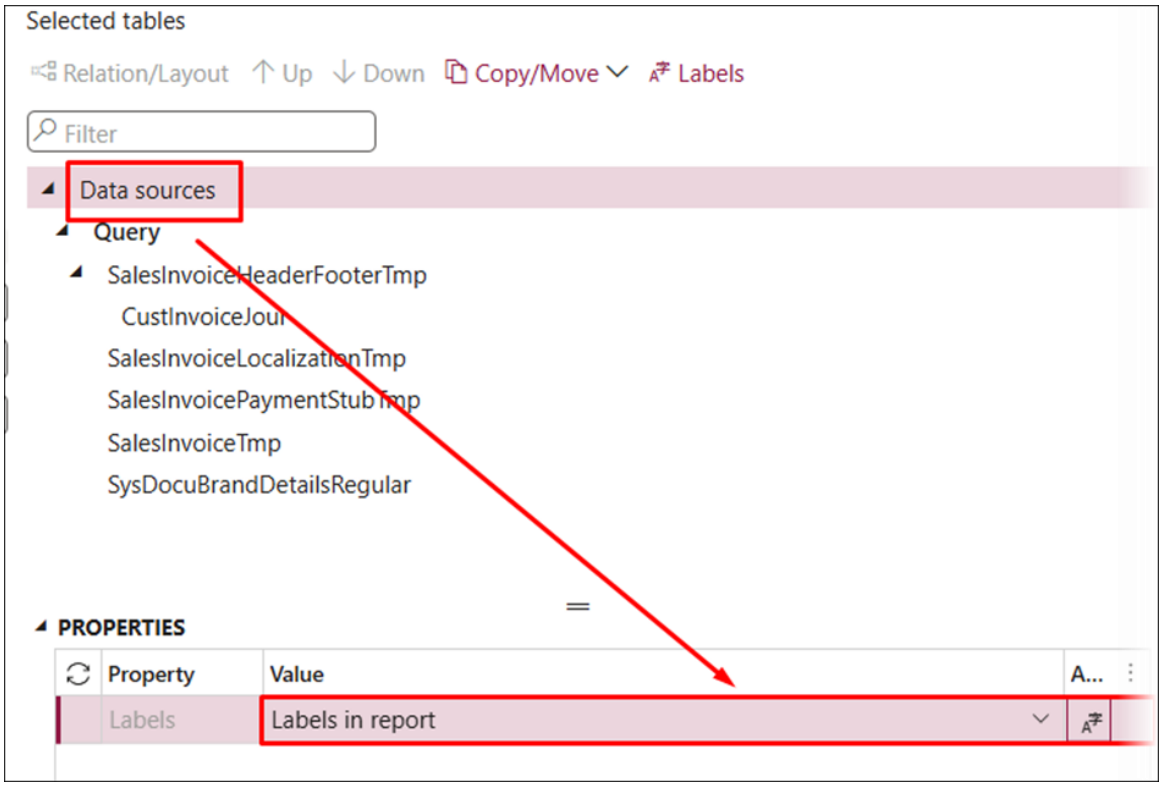
The Lasernet Essentials **Query wizard** is a simplified version of the Lasernet Professional/Enterprise **Query wizard** (it is not possible to create an AOT Query, a Query from class, or group data into files), and it includes the following features:

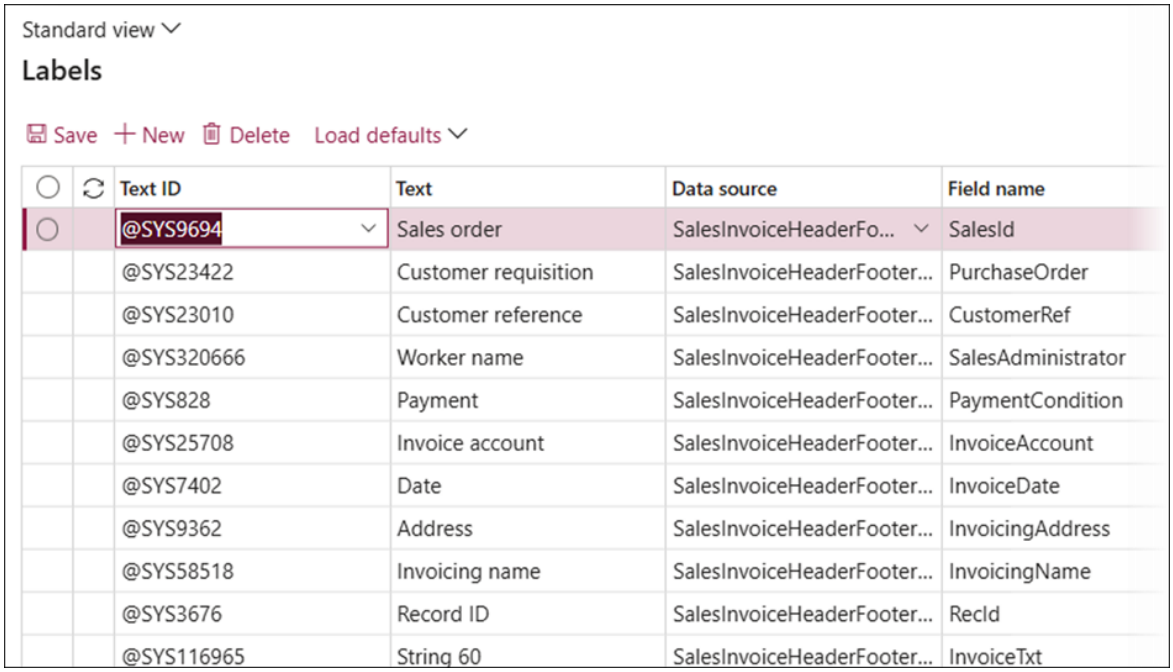
1. **Tables**

1. You can link related tables or establish relationships between them.

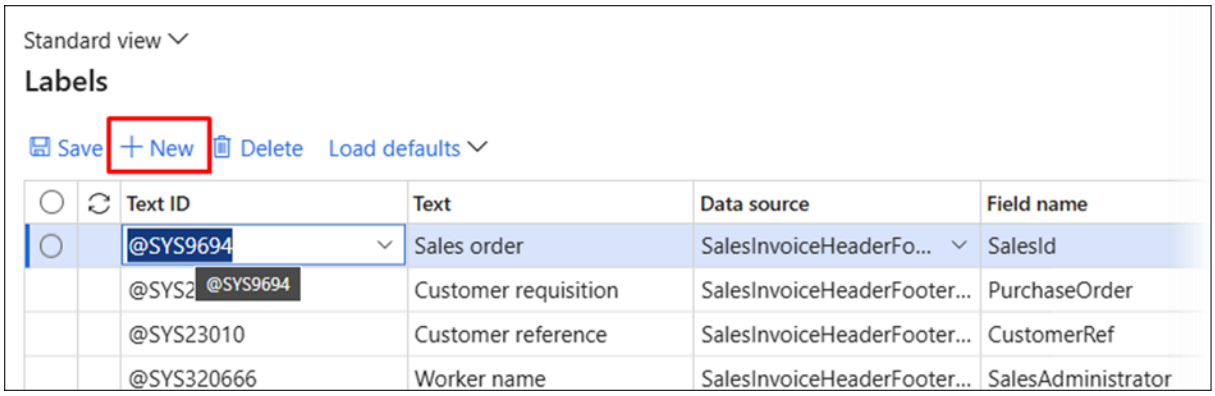


2. Language **Labels** can be defined at the **Data sources** level, incorporating existing language texts for the report.

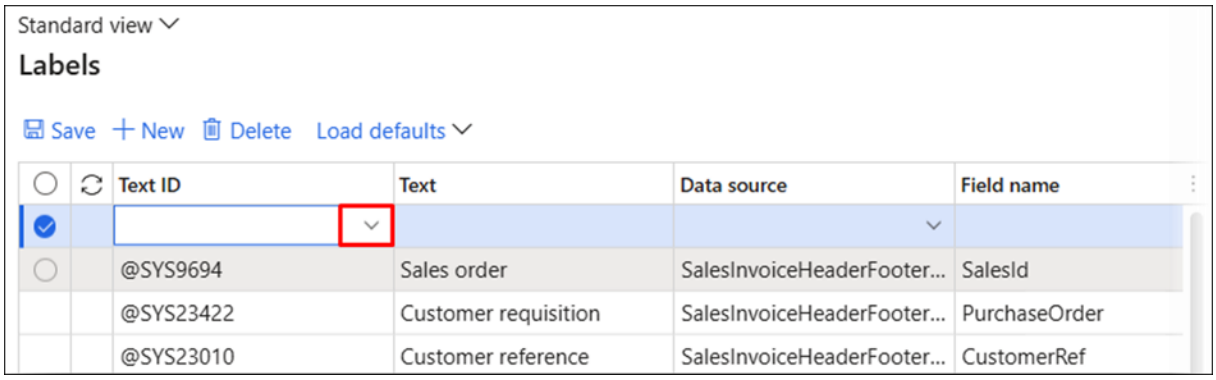




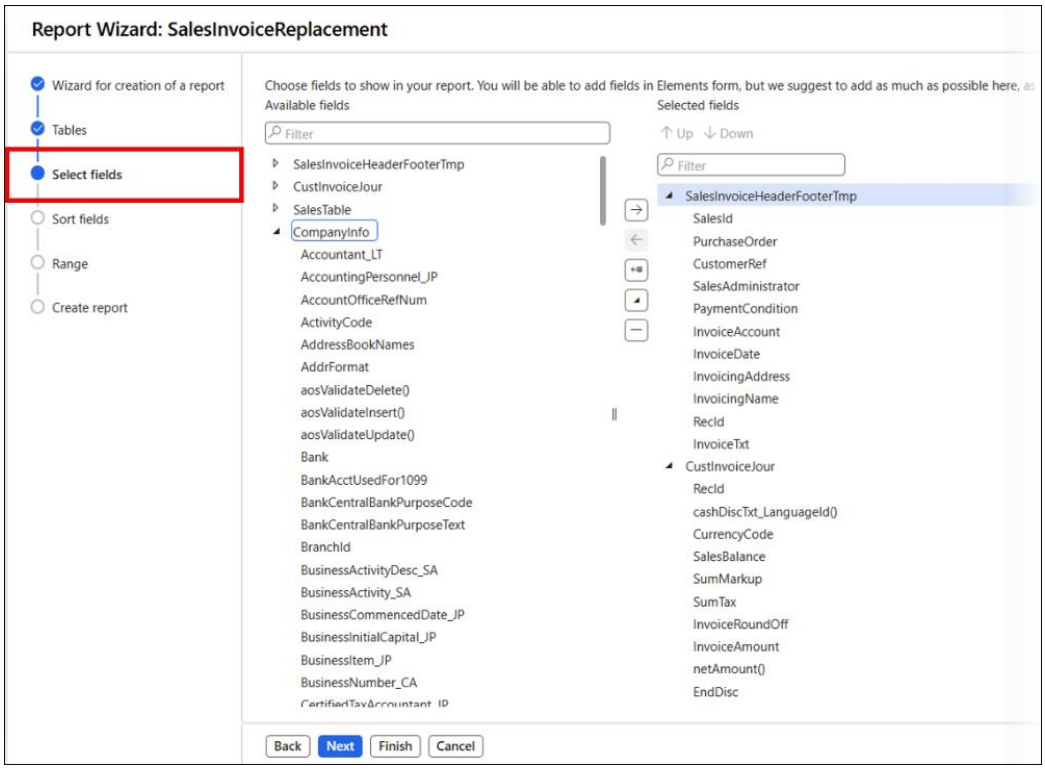
3. Click **+New** to add a new **Label** or translation.



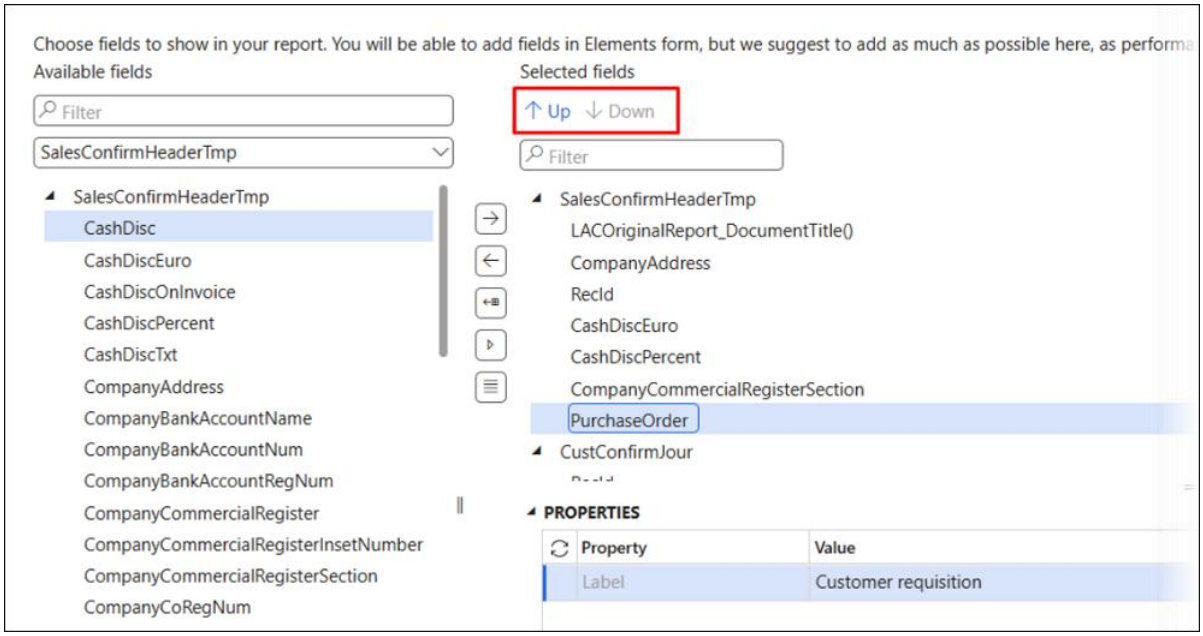
4. Finally, click the **Text ID** dropdown.



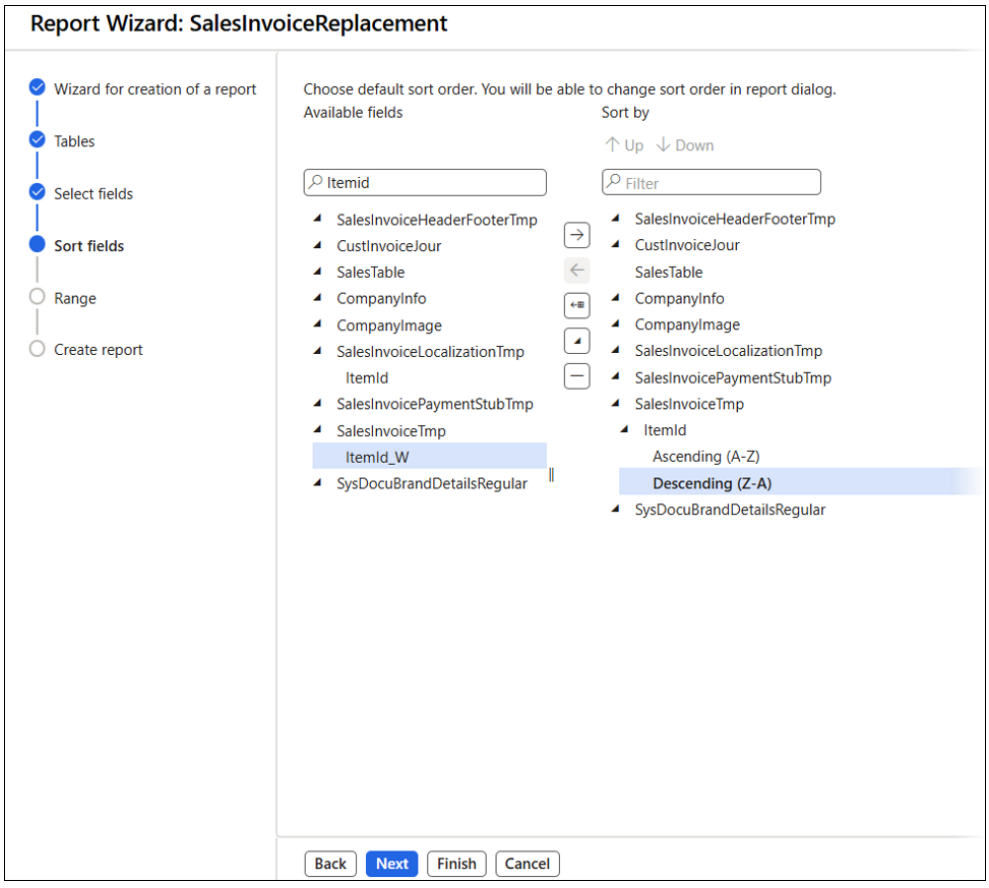
2. Select Fields



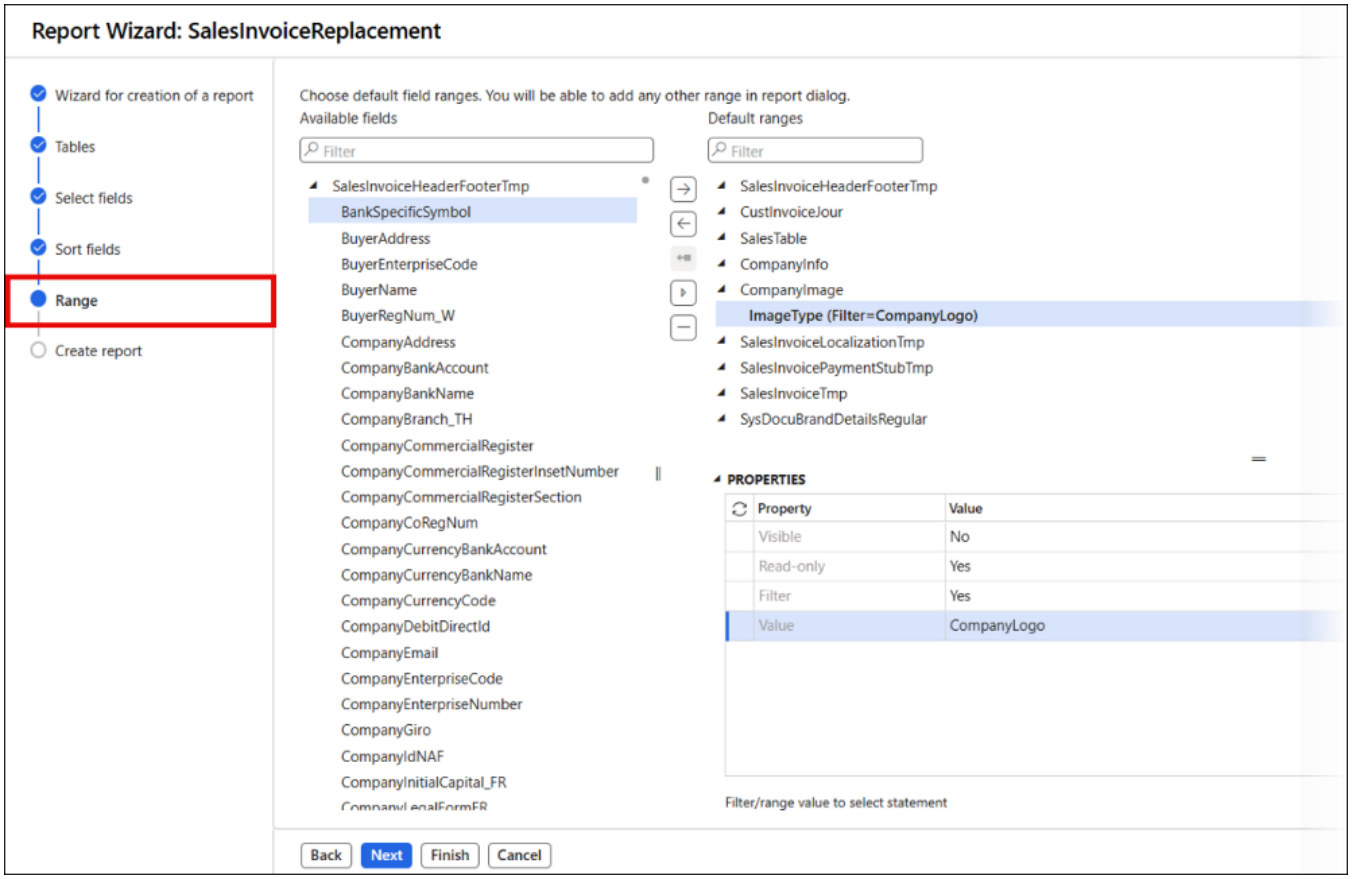
In the **Select fields** section of the **Query wizard**, users can move selected fields using the **Up** and **Down** buttons.



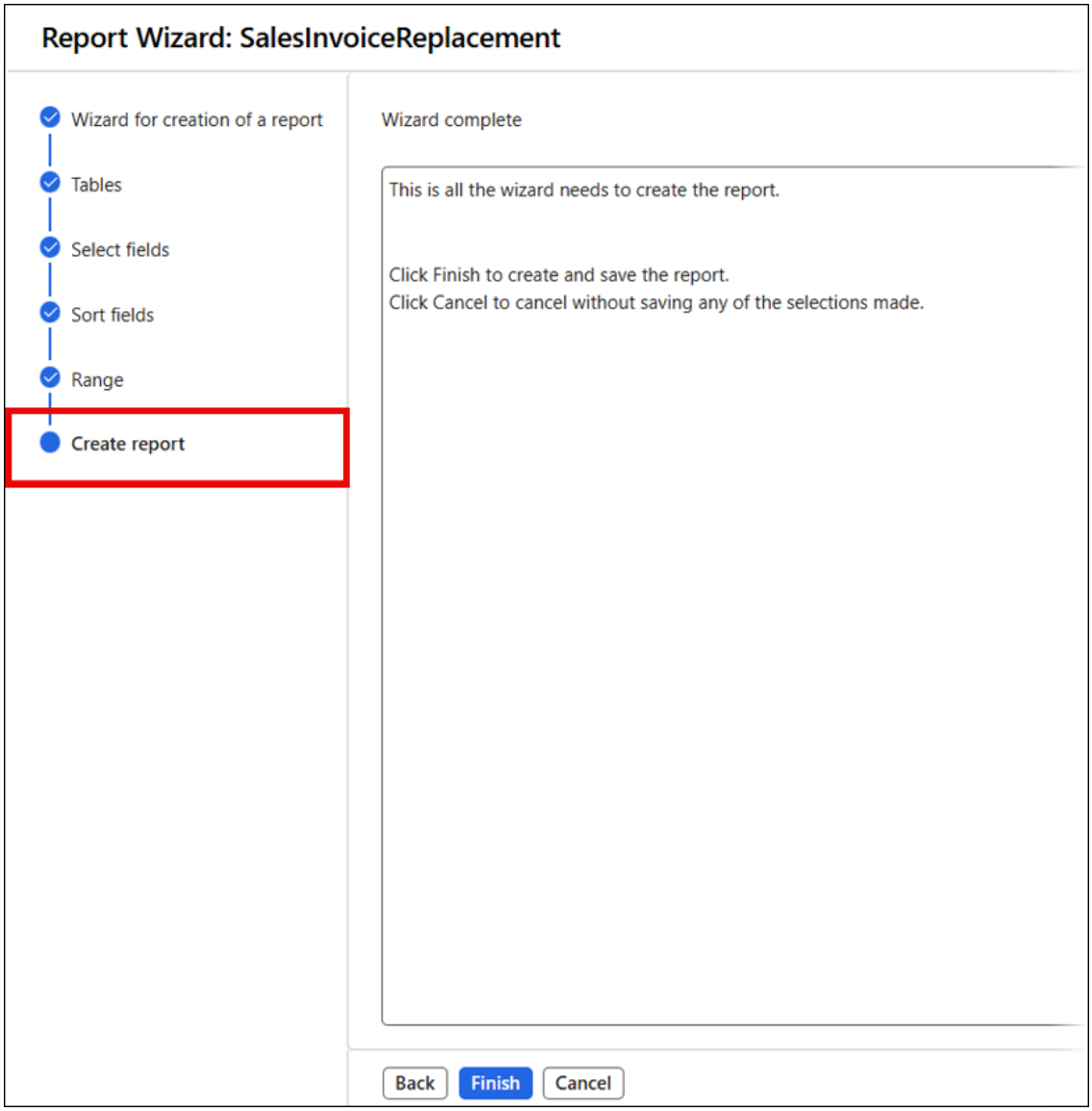
3. Sort Fields



4. Range

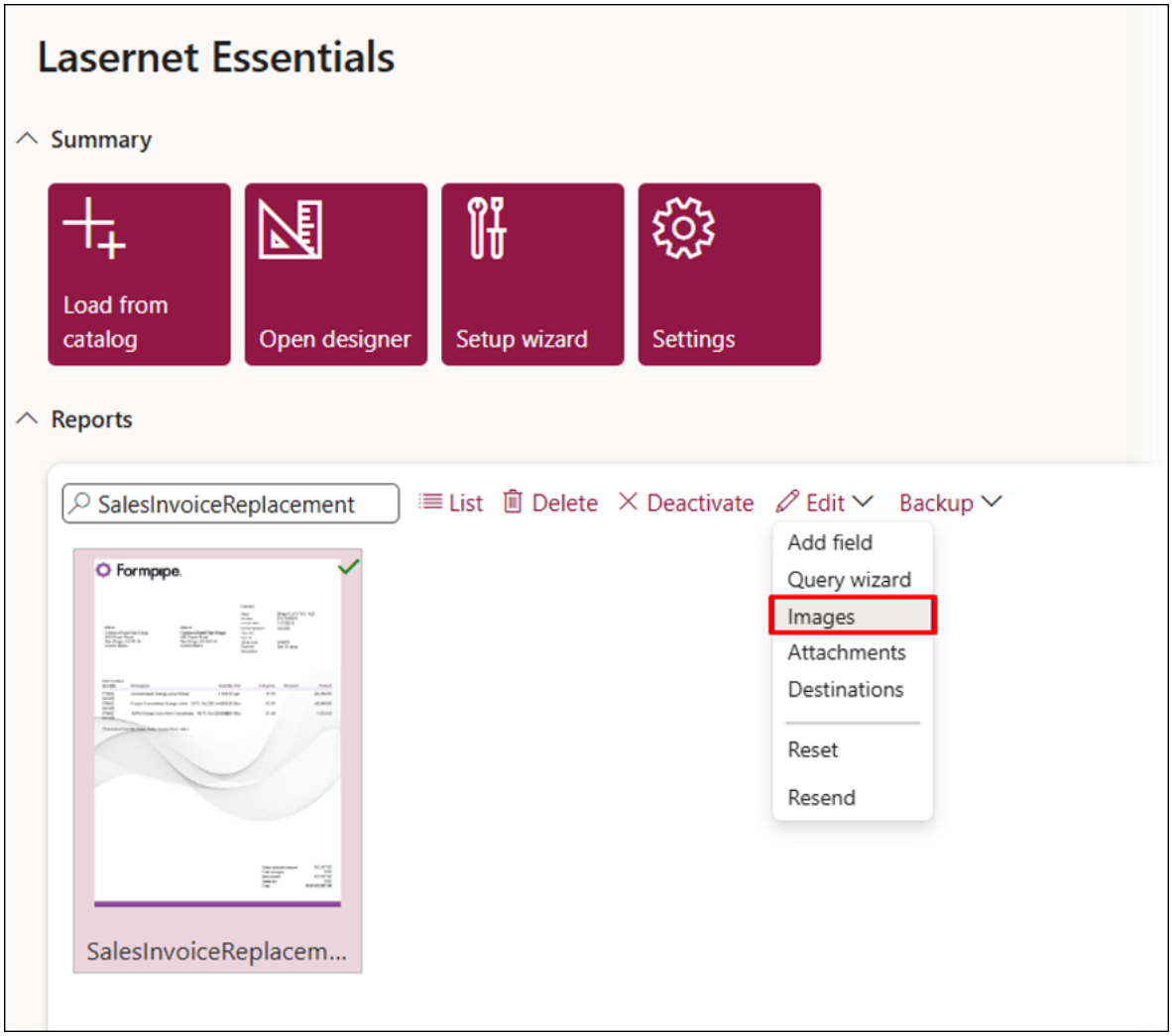

Report Wizard: SalesInvoiceReplacement
Wizard for creation of a report
Tables
Select fields
Sort fields
Range
Create report
Choose default field ranges. You will be able to add any other range in report dialog.
Available fields
Default ranges
Filter
SalesInvoiceHeaderFooterTmp
BankSpecificSymbol
BuyerAddress
BuyerEnterpriseCode
BuyerName
BuyerRegNum_W
CompanyAddress
CompanyBankAccount
CompanyBankName
CompanyBranch_TH
CompanyCommercialRegister
CompanyCommercialRegisterInsetNumber
CompanyCommercialRegisterSection
CompanyCoRegNum
CompanyCurrencyBankAccount
CompanyCurrencyBankName
CompanyCurrencyCode
CompanyDebitDirectId
CompanyEmail
CompanyEnterpriseCode
CompanyEnterpriseNumber
CompanyGiro
CompanyIdNAF
CompanyInitialCapital_FR
CompanyLegalFormFR
SalesInvoiceHeaderFooterTmp
CustInvoiceJour
SalesTable
CompanyInfo
CompanyImage
ImageType (Filter=CompanyLogo)
SalesInvoiceLocalizationTmp
SalesInvoicePaymentStubTmp
SalesInvoiceTmp
SysDocuBrandDetailsRegular
PROPERTIES
Property
Value
Visible
No
Read-only
Yes
Filter
Yes
Value
CompanyLogo
Filter/range value to select statement
Back
Next
Finish
Cancel

5. Create Report



5.2.4.3 Images

Choose the **Images** option from the **Edit** dropdown menu to add images to your reports.



The images and **Image gallery** in Lasernet Essentials can also be used in Lasernet Professional as same engine is used for both versions.

Images can be inserted from the workspace as well as through the **Preview** of a report.

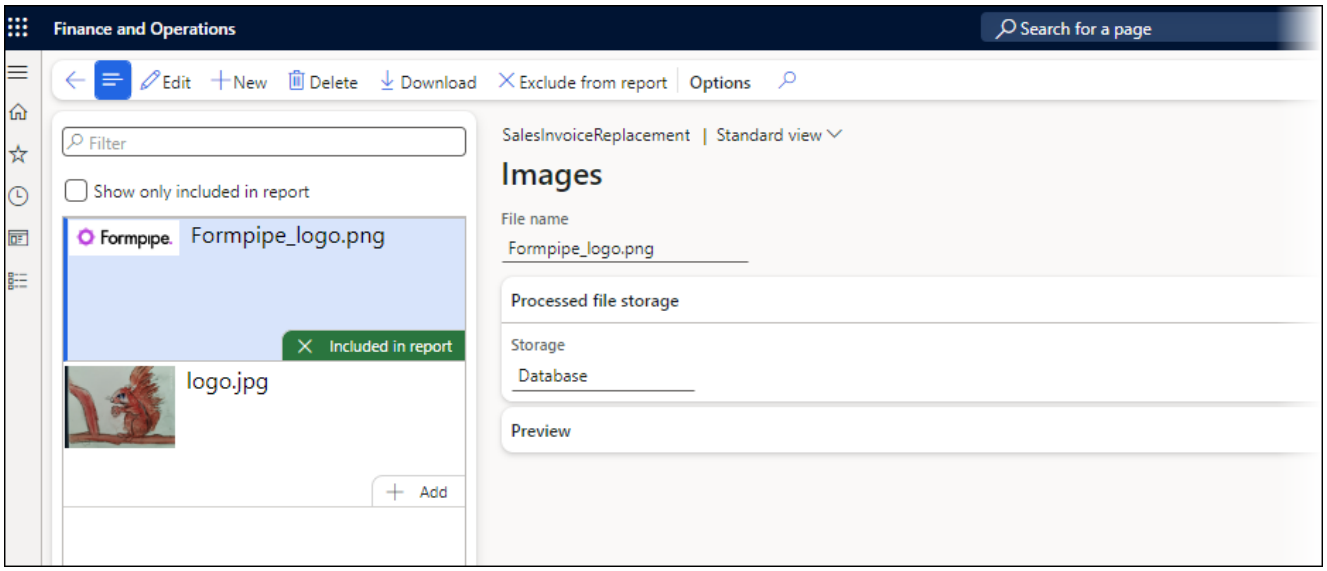
Only users with Lasernet Administrator or System Administrator roles can add or remove images.

You will need to upload files to the Finance and Operations database to add a logo or **Overlay** to your reports. Each image upload will be added to the report that you have picked, as well as to the **Image gallery** for all reports. Follow these steps:

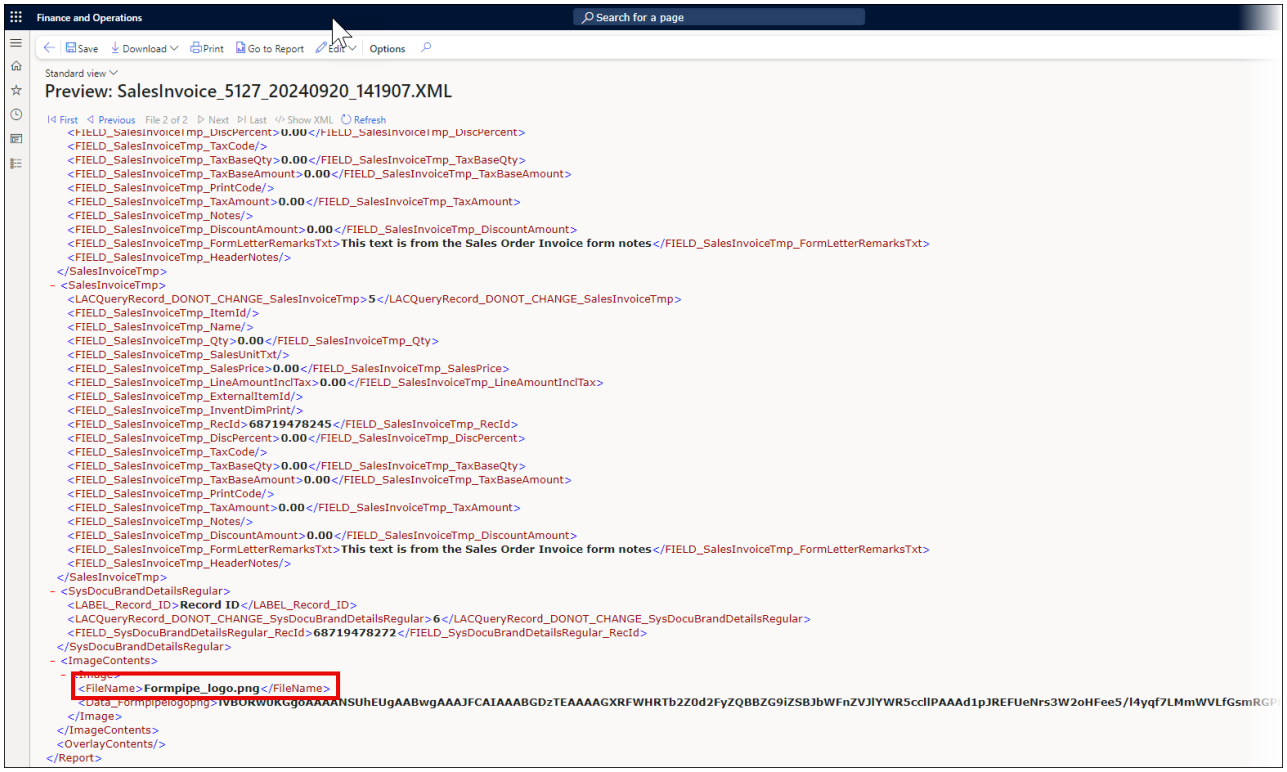
1. Highlight your report.

2. Click **Images**.

3. Browse to the image you wish to use with your report.



The next time you print the report, you will see the reference to the image in the XML (placed at the bottom of the XML).


Finance and Operations
Search for a page
Save
Download
Print
Go to Report
Edit
Options
Standard view
Preview: SalesInvoice_5127_20240920_141907.XML
First
Previous
File 2 of 2
Next
Last
Show XML
Refresh
<FIELD_SalesInvoiceTmp_DiscPercent>0.00</FIELD_SalesInvoiceTmp_DiscPercent>
<FIELD_SalesInvoiceTmp_TaxCode/>
<FIELD_SalesInvoiceTmp_TaxBaseQty>0.00</FIELD_SalesInvoiceTmp_TaxBaseQty>
<FIELD_SalesInvoiceTmp_TaxBaseAmount>0.00</FIELD_SalesInvoiceTmp_TaxBaseAmount>
<FIELD_SalesInvoiceTmp_PrintCode/>
<FIELD_SalesInvoiceTmp_TaxAmount>0.00</FIELD_SalesInvoiceTmp_TaxAmount>
<FIELD_SalesInvoiceTmp_Notes/>
<FIELD_SalesInvoiceTmp_DiscountAmount>0.00</FIELD_SalesInvoiceTmp_DiscountAmount>
<FIELD_SalesInvoiceTmp_FormLetterRemarksTxt>This text is from the Sales Order Invoice form notes</FIELD_SalesInvoiceTmp_FormLetterRemarksTxt>
<FIELD_SalesInvoiceTmp_HeaderNotes/>
</SalesInvoiceTmp>
<SalesInvoiceTmp>
<LACQueryRecord_DONOT_CHANGE_SalesInvoiceTmp>5</LACQueryRecord_DONOT_CHANGE_SalesInvoiceTmp>
<FIELD_SalesInvoiceTmp_ItemId/>
<FIELD_SalesInvoiceTmp_Name/>
<FIELD_SalesInvoiceTmp_Qty>0.00</FIELD_SalesInvoiceTmp_Qty>
<FIELD_SalesInvoiceTmp_SalesUnitTxt/>
<FIELD_SalesInvoiceTmp_SalesPrice>0.00</FIELD_SalesInvoiceTmp_SalesPrice>
<FIELD_SalesInvoiceTmp_LineAmountInclTax>0.00</FIELD_SalesInvoiceTmp_LineAmountInclTax>
<FIELD_SalesInvoiceTmp_ExternalItemId/>
<FIELD_SalesInvoiceTmp_InventDimPrint/>
<FIELD_SalesInvoiceTmp_RecId>68719478245</FIELD_SalesInvoiceTmp_RecId>
<FIELD_SalesInvoiceTmp_DiscPercent>0.00</FIELD_SalesInvoiceTmp_DiscPercent>
<FIELD_SalesInvoiceTmp_TaxCode/>
<FIELD_SalesInvoiceTmp_TaxBaseQty>0.00</FIELD_SalesInvoiceTmp_TaxBaseQty>
<FIELD_SalesInvoiceTmp_TaxBaseAmount>0.00</FIELD_SalesInvoiceTmp_TaxBaseAmount>
<FIELD_SalesInvoiceTmp_PrintCode/>
<FIELD_SalesInvoiceTmp_TaxAmount>0.00</FIELD_SalesInvoiceTmp_TaxAmount>
<FIELD_SalesInvoiceTmp_Notes/>
<FIELD_SalesInvoiceTmp_DiscountAmount>0.00</FIELD_SalesInvoiceTmp_DiscountAmount>
<FIELD_SalesInvoiceTmp_FormLetterRemarksTxt>This text is from the Sales Order Invoice form notes</FIELD_SalesInvoiceTmp_FormLetterRemarksTxt>
<FIELD_SalesInvoiceTmp_HeaderNotes/>
</SalesInvoiceTmp>
<SysDocuBrandDetailsRegular>
<LABEL_Record_ID>Record ID</LABEL_Record_ID>
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<FIELD_SysDocuBrandDetailsRegular_RecId>68719478272</FIELD_SysDocuBrandDetailsRegular_RecId>
</SysDocuBrandDetailsRegular>
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<Image>
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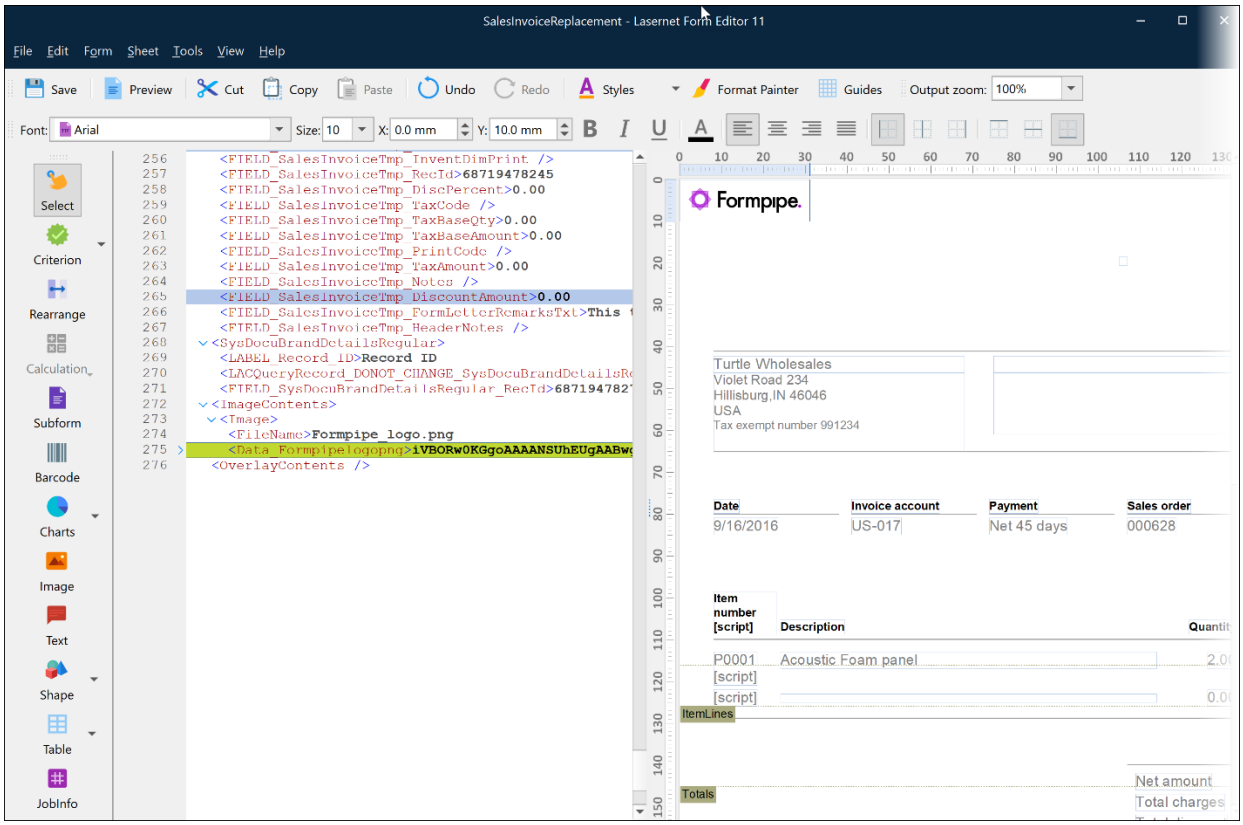
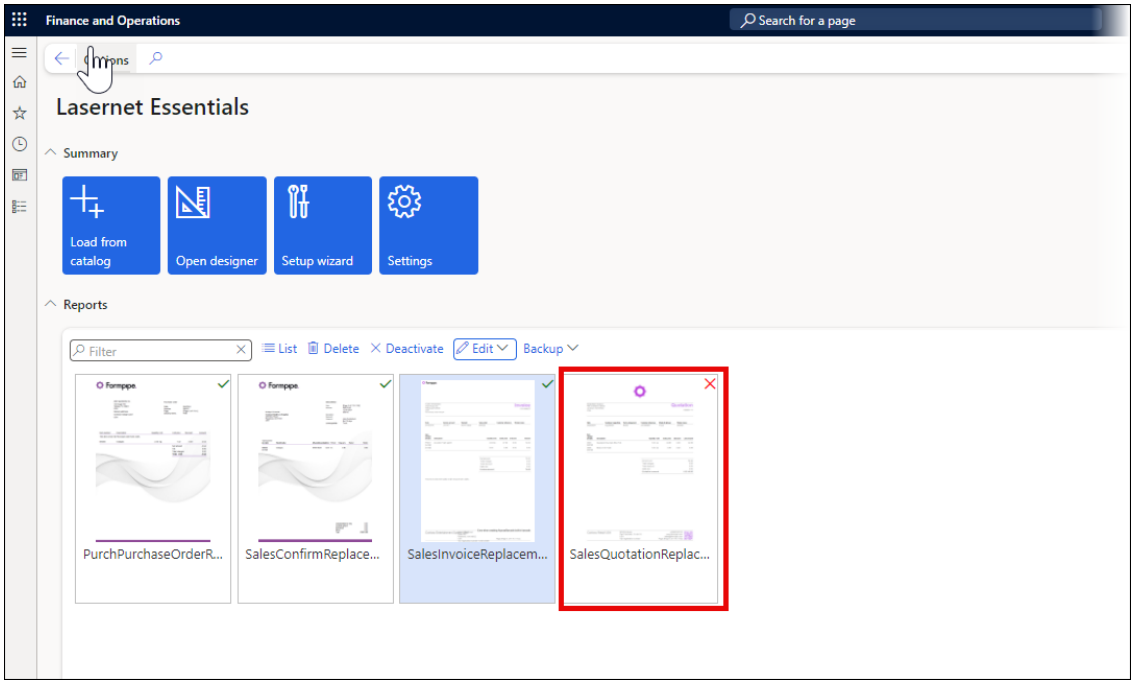
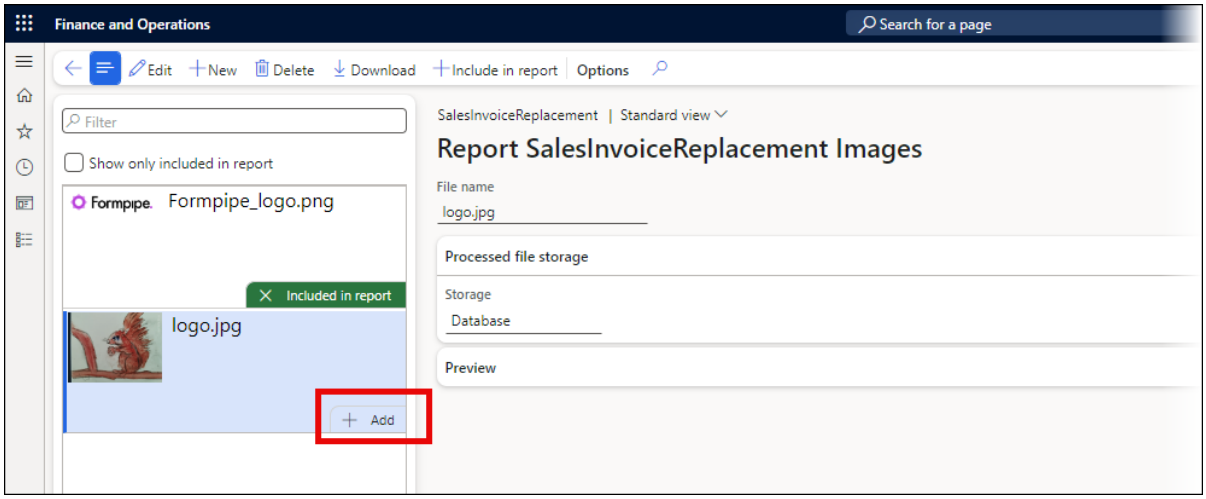


5. Click **Save**, and your new design will be ready to use. You will also see the updated design in your **Lasernet reports management** menu.

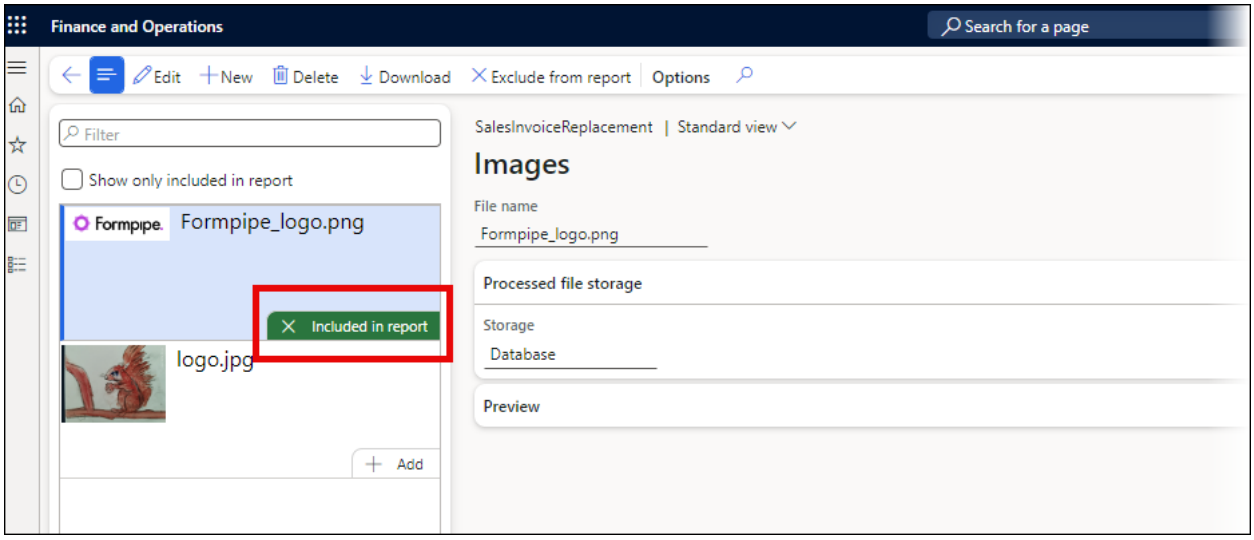


If you have already uploaded an image for a report, you can add that same image to the other reports by clicking **+Add**.

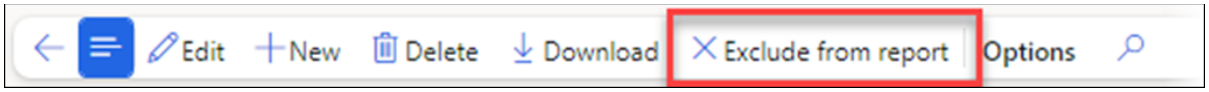


Or by clicking the **+Include in report** option on the top menu bar.

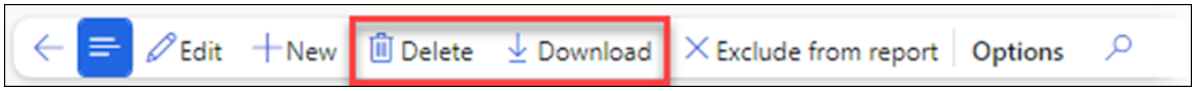
You can also remove an image from a report by clicking the **X** symbol on the green **Included in report** banner.



Or by clicking the **Exclude from report** option on the top menu bar.



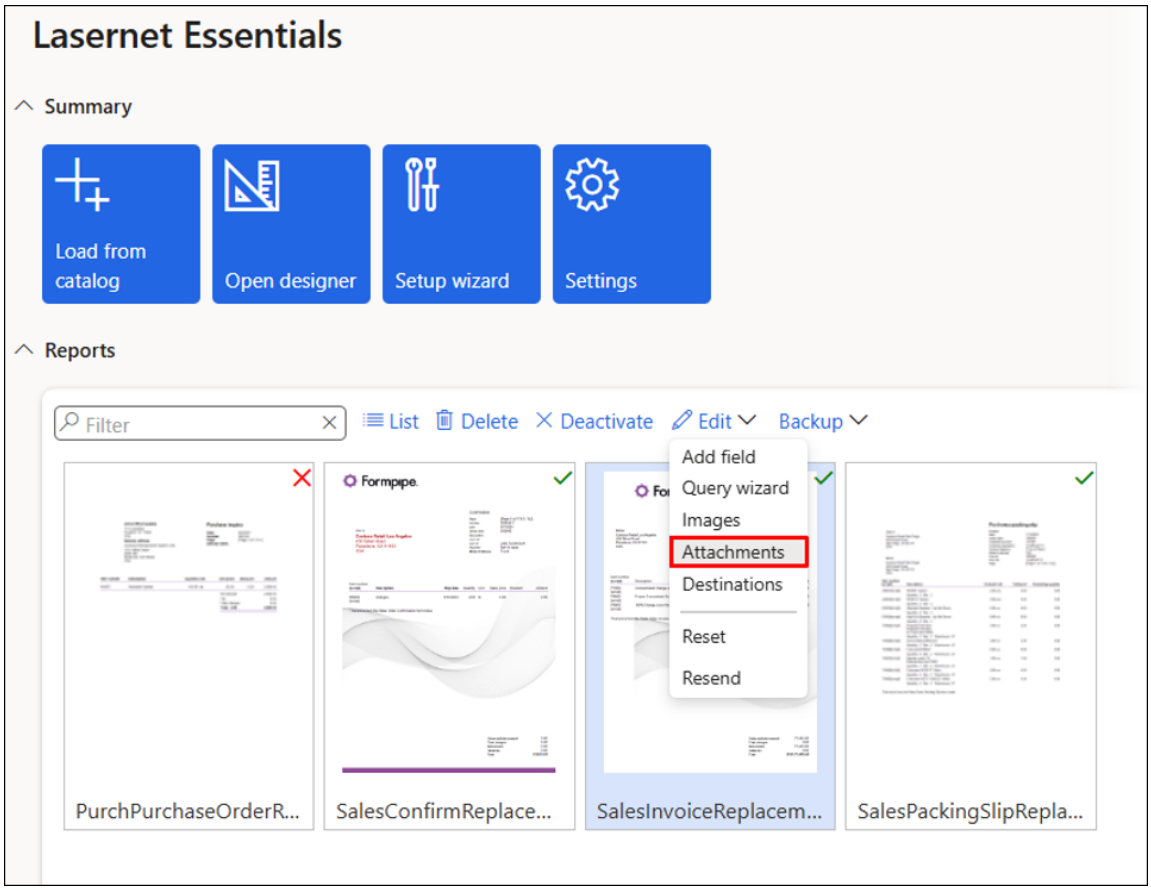
If you wish to download or delete an image, highlight it and click the **Download** or **Delete** buttons on the top menu bar.



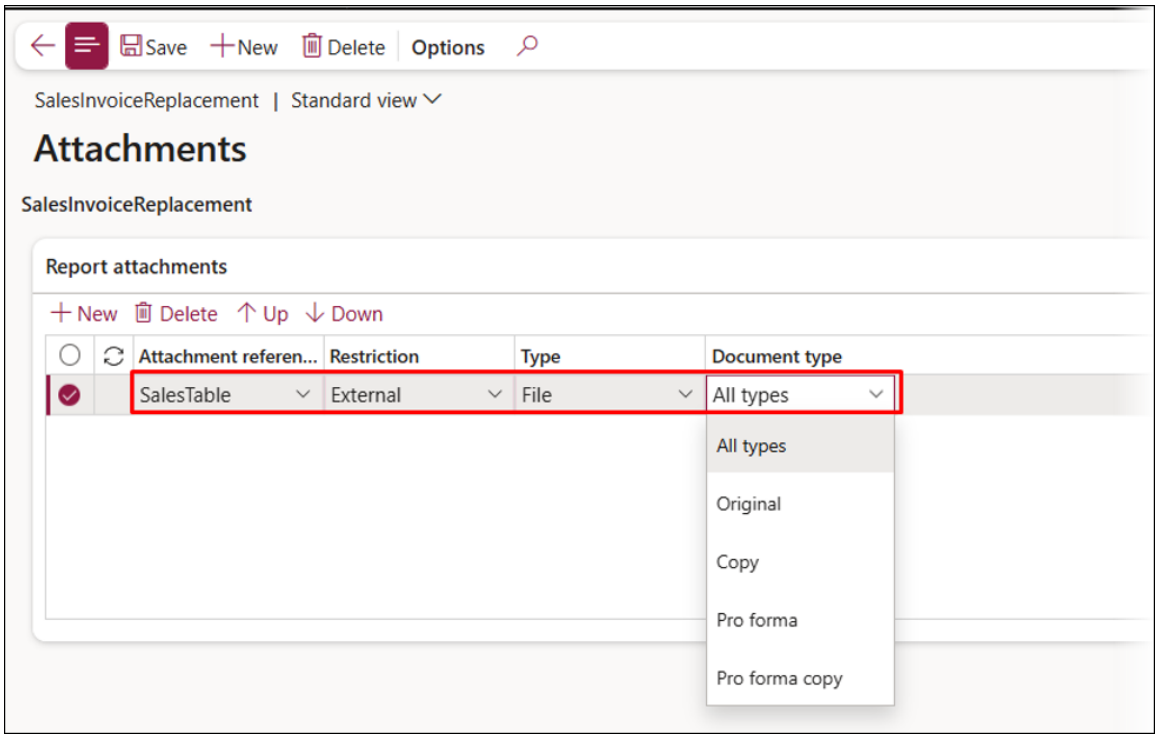
5.2.4.4 Attachments

It is possible to configure attachments directly from the attachment form in standard Dynamics 365 FO, by using the **Attachments** button within the report **Preview**, or within the **Lasernet Essentials** workspace.

To do so, select the desired report and click **Edit** > **Attachments**.



Attachments can be configured by adding the tables (**Attachment reference**) for which the attachment is used and define the **Restriction**, **Type**, and **Document type**.



Restriction

When adding attachments to a report, it is possible to choose between **Internal** and **External** restrictions. **Internal** restrictions are meant to hide company information from customers, while **External** restrictions hide customer information.

Type

When choosing the **Type** of attachment to add to a report, it is possible to choose from **File**, **Image**, **Note**, or **URL**.

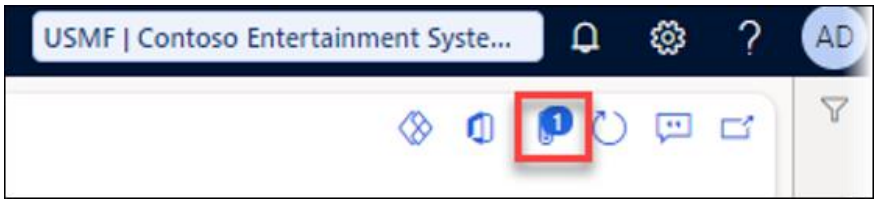
Document Type

When adding an attachment, it is possible to choose from **All Types**, **Original**, **Copy**, **Pro Forma**, or P**ro Forma Copy**, to determine to which type of document you will attach your extra document(s).

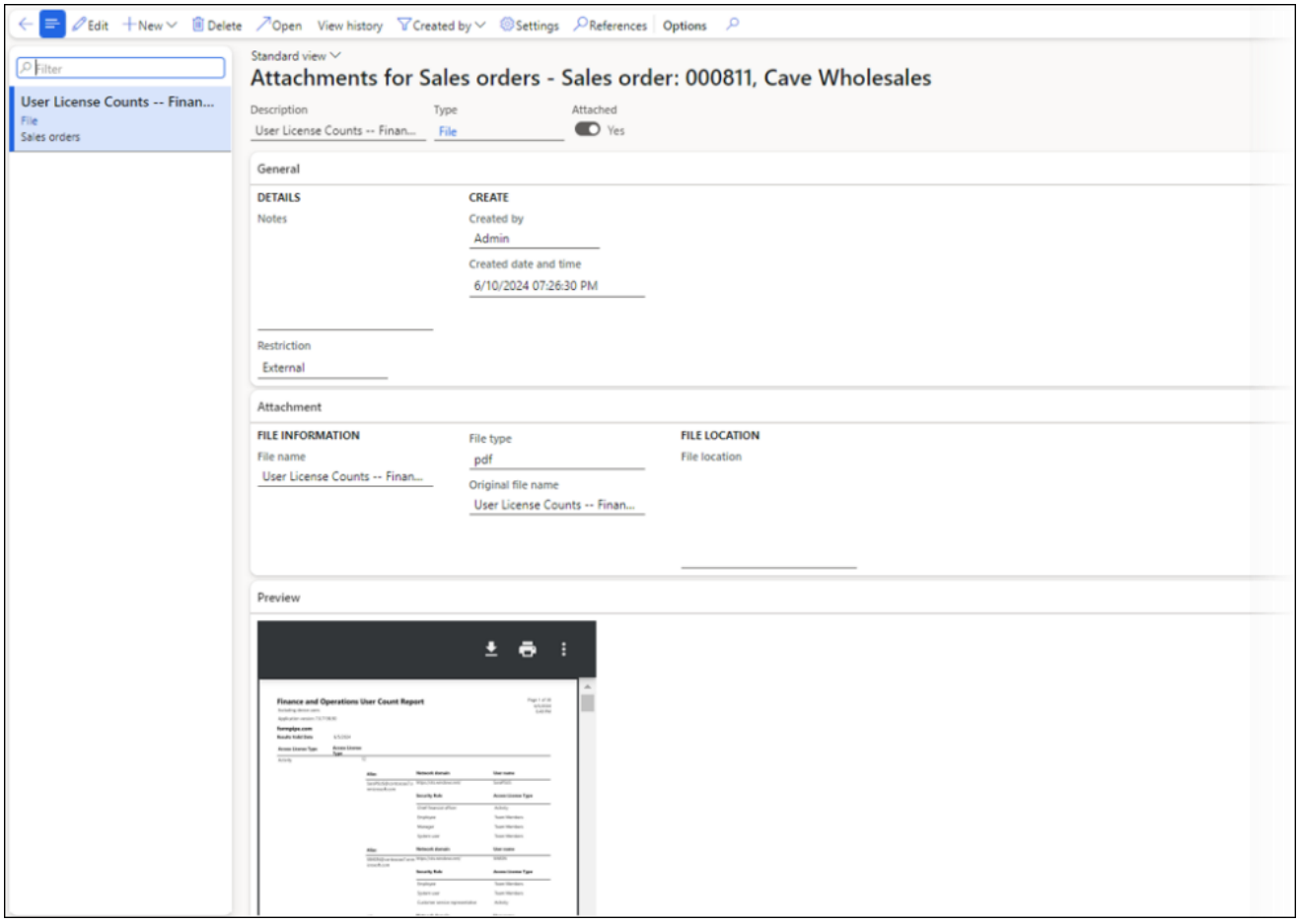
Note

You will need to upload the document you wish to go along with your report printout.

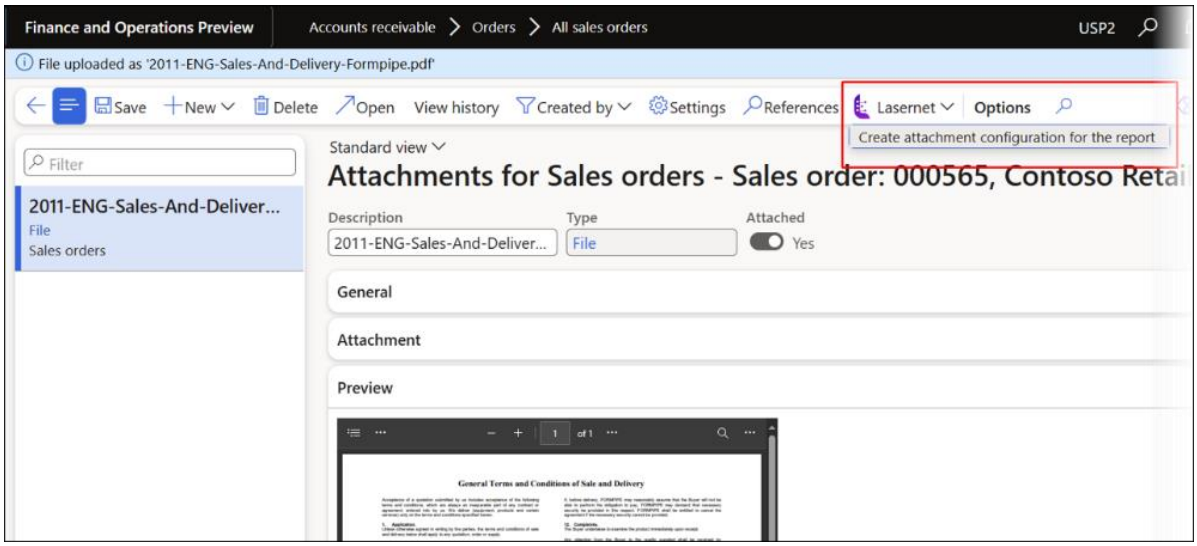
1. Navigate to the customer or vendor report and attach the documents using the little clip icon in Finance and Operations.

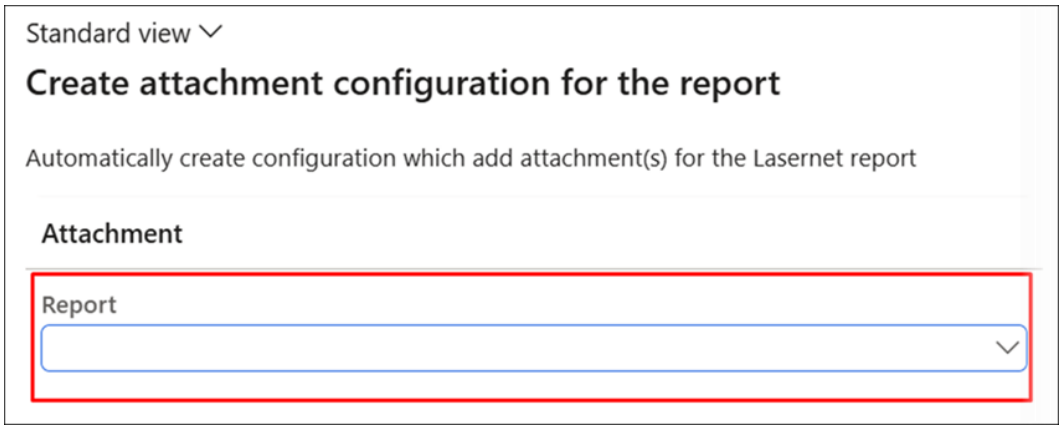


2. Upload your document.

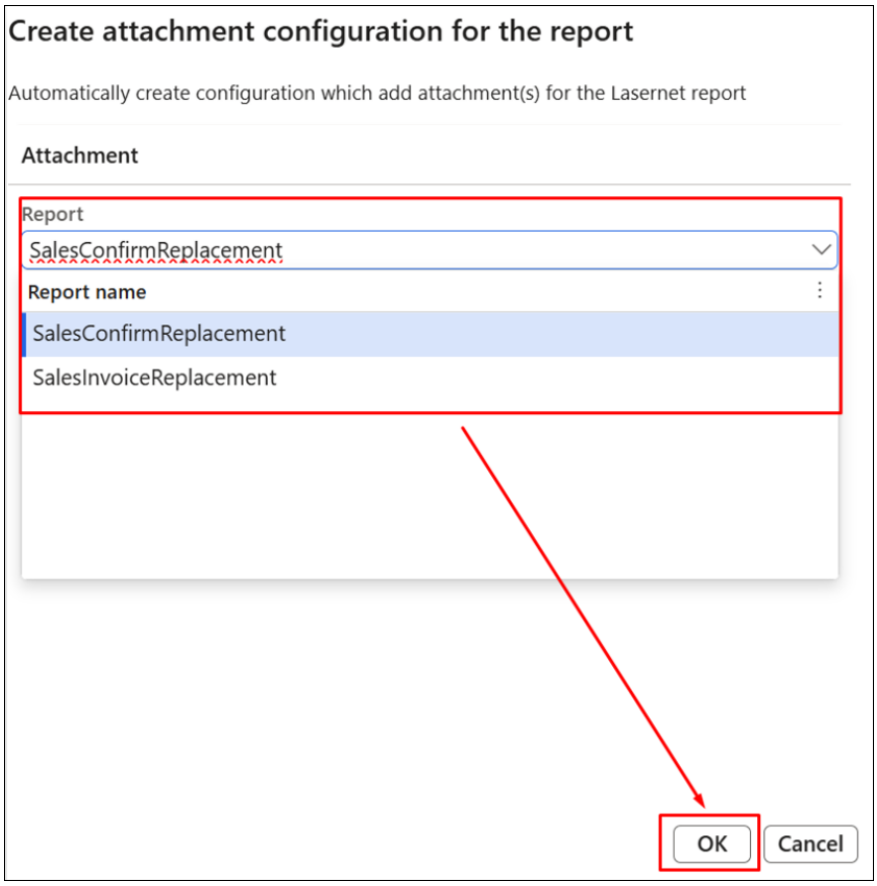


Attachments can also be configured directly and automatically from the attachment form.

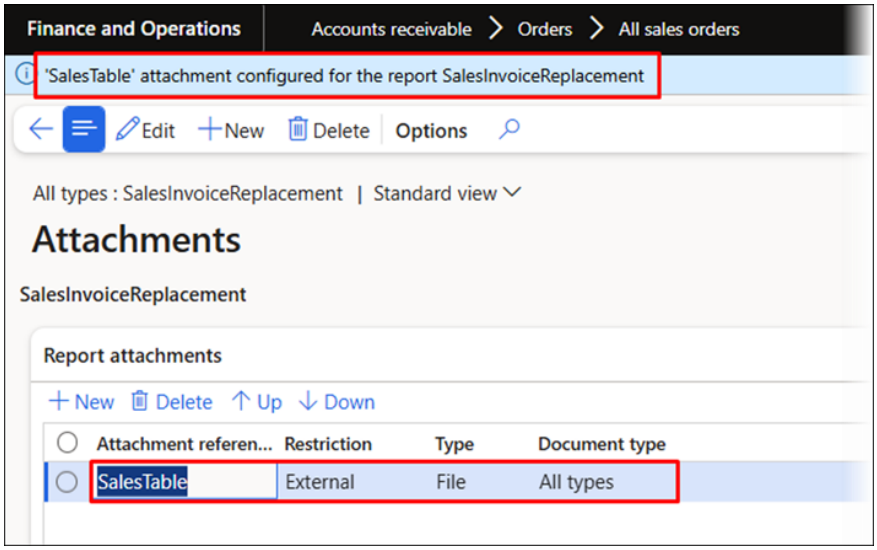




3. Choose the desired report, ensure the table used for the attachment is included in the report within the **Query wizard**, and then click **OK**.

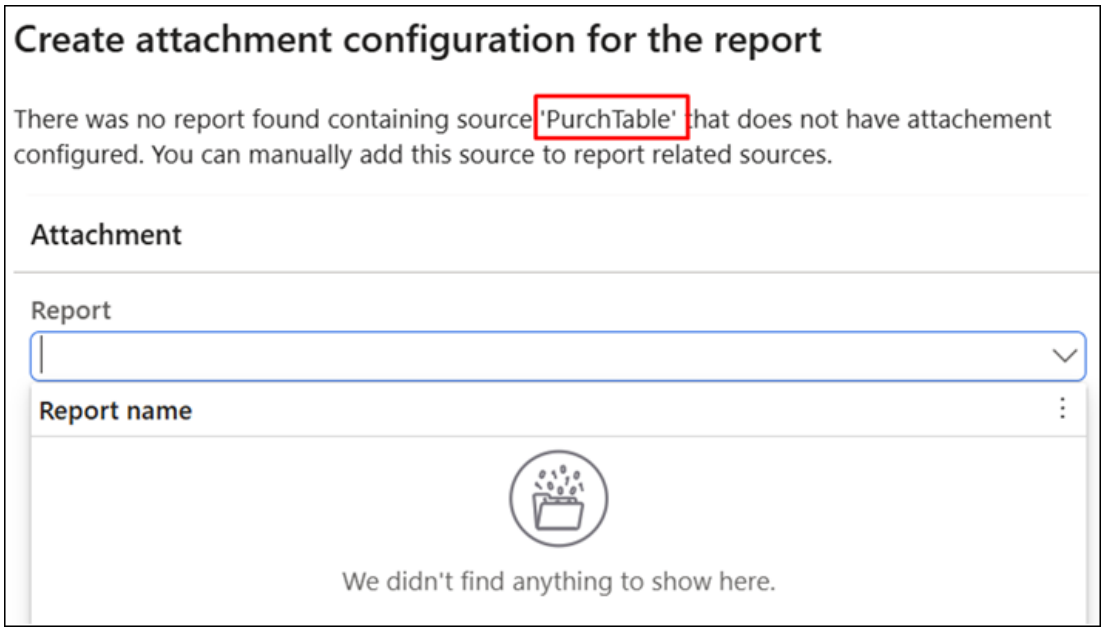


The configured settings will be displayed in the following form:



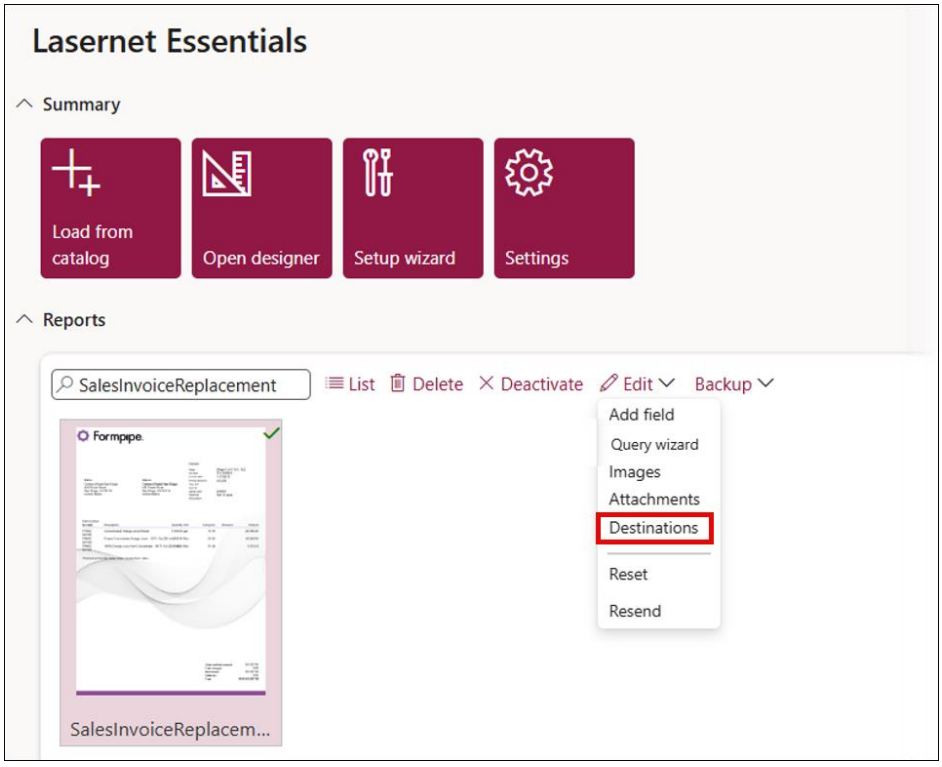
The following is displayed in case no additional report can be configured for the attachment(s), such as if all reports with the required table have already been configured.

Pay attention to the source (table) mentioned in the info box as this is required within the report's **Query wizard** to have the report as part of the lookup.

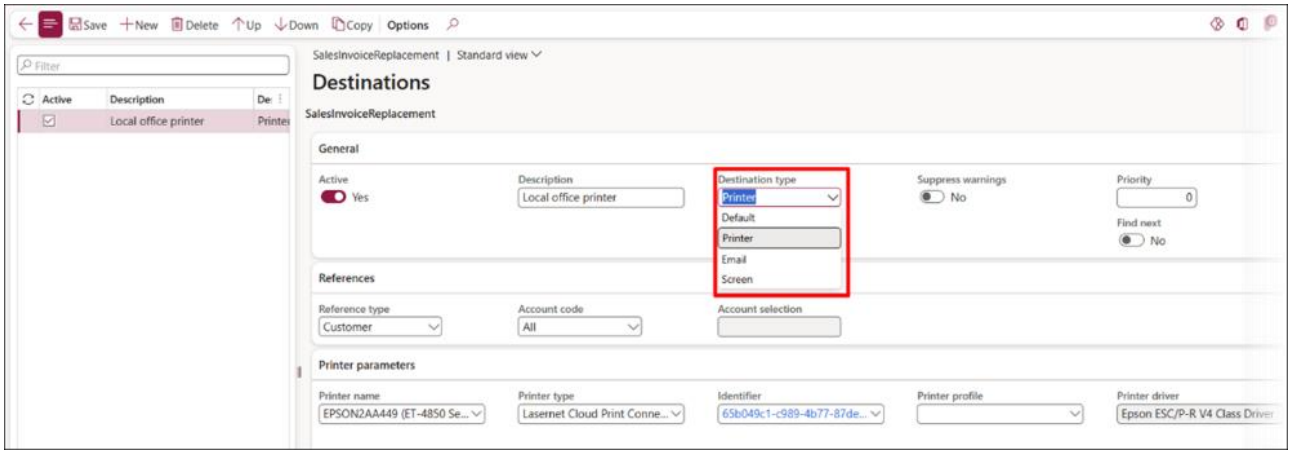


5.2.4.5 Destinations

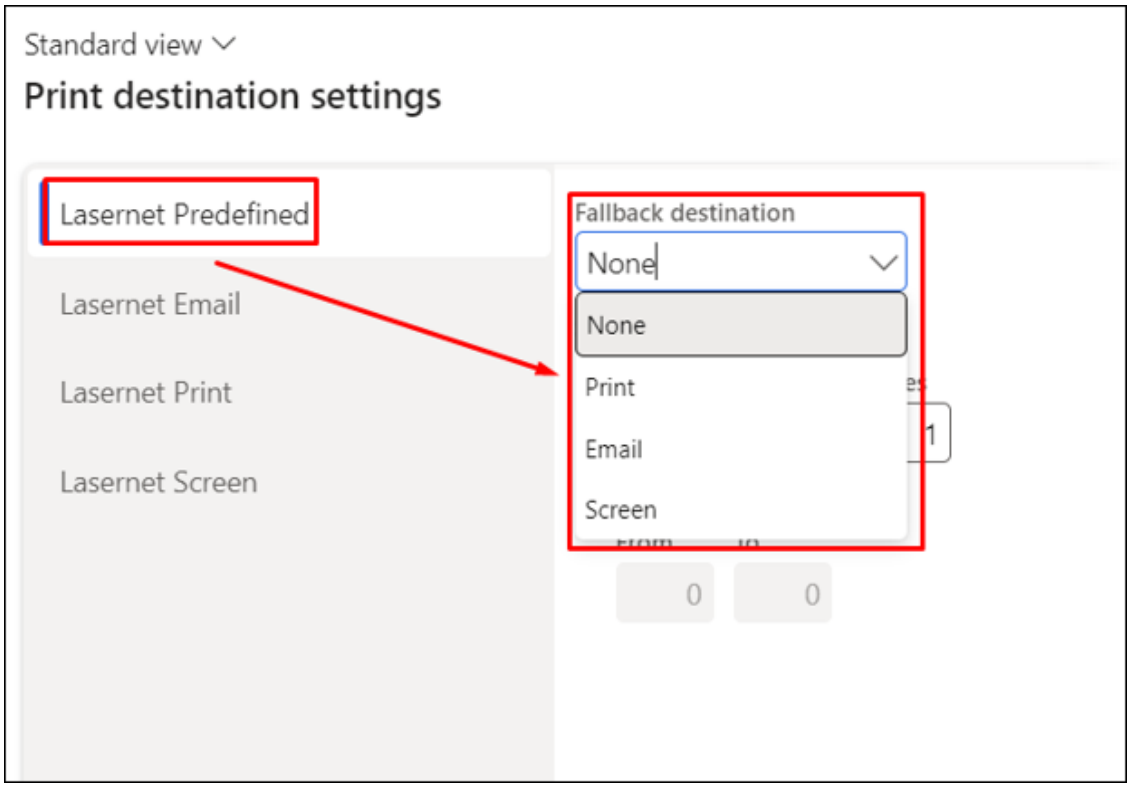
In Lasernet Essentials, **Destinations** are only available from the workspace and not from the **Preview**. This feature provides the option to configure predefined destinations for a report.



Destinations can be defined for **Printer**, **Email**, and **Screen**.



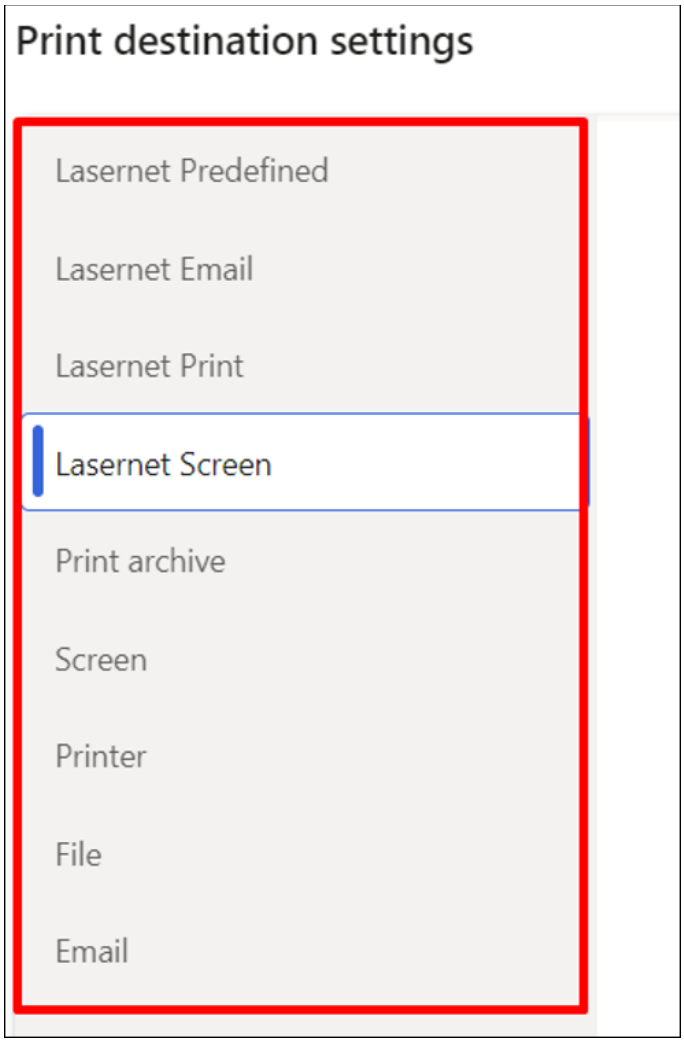
The predefined destinations are used within the printer dialog. It is also possible to define a **Fallback destination** used in case no predefined destinations are found.



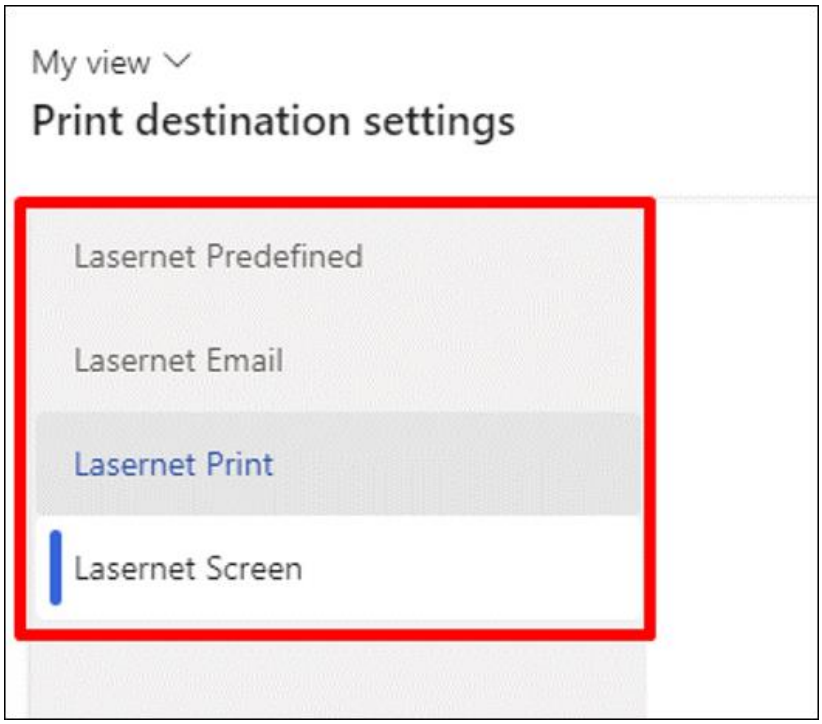
Both standard destinations and destinations configured for Lasernet are shown if a user has one of the following roles:

- System Administrator
- Lasernet Administrator

- Lasernet Advanced User



Only Lasernet destinations are shown in case a user has the Lasernet User role.

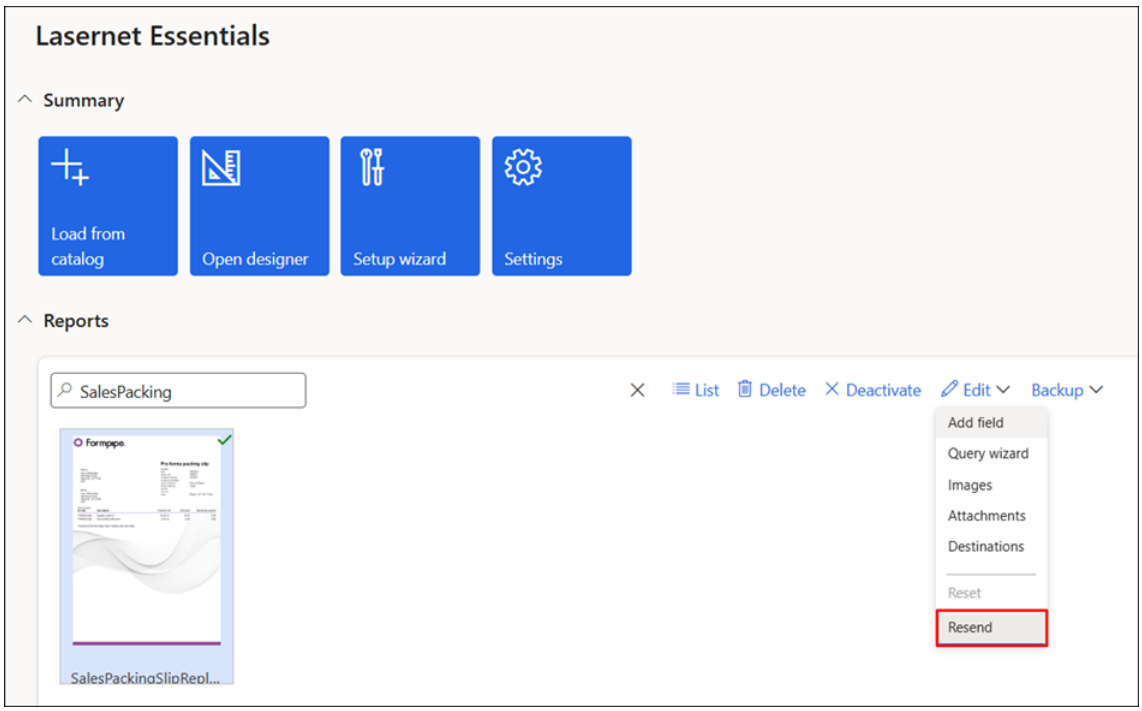


5.2.4.6 Resend

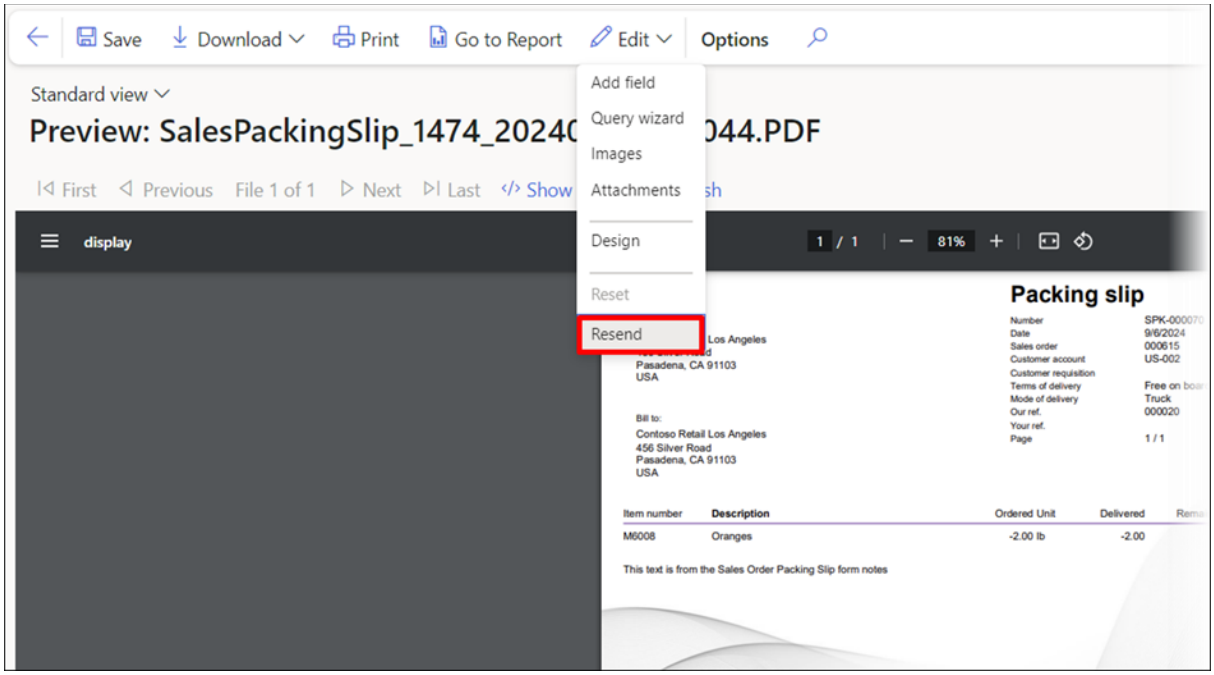
The **Resend** option from the **Edit** dropdown menu is useful for regenerating the output, such as if additional data has been added. The system will always use a single entry within the **Lasernet Archive** as the source for the resend.

The **Resend** feature is available both in the workspace and in the report **Preview**.

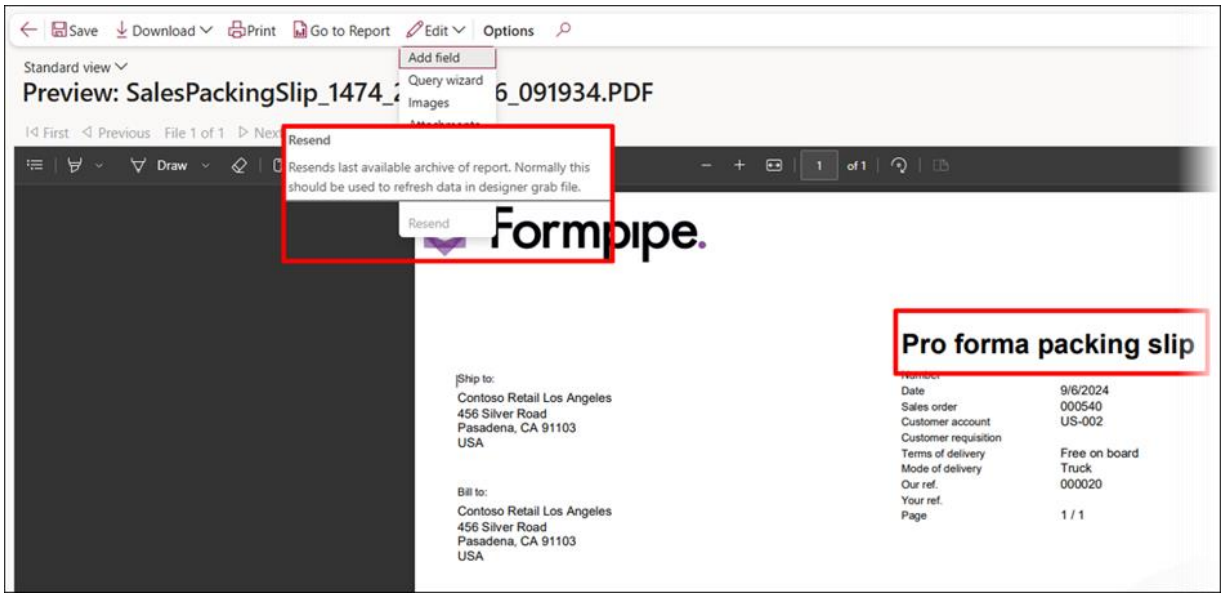
Workspace



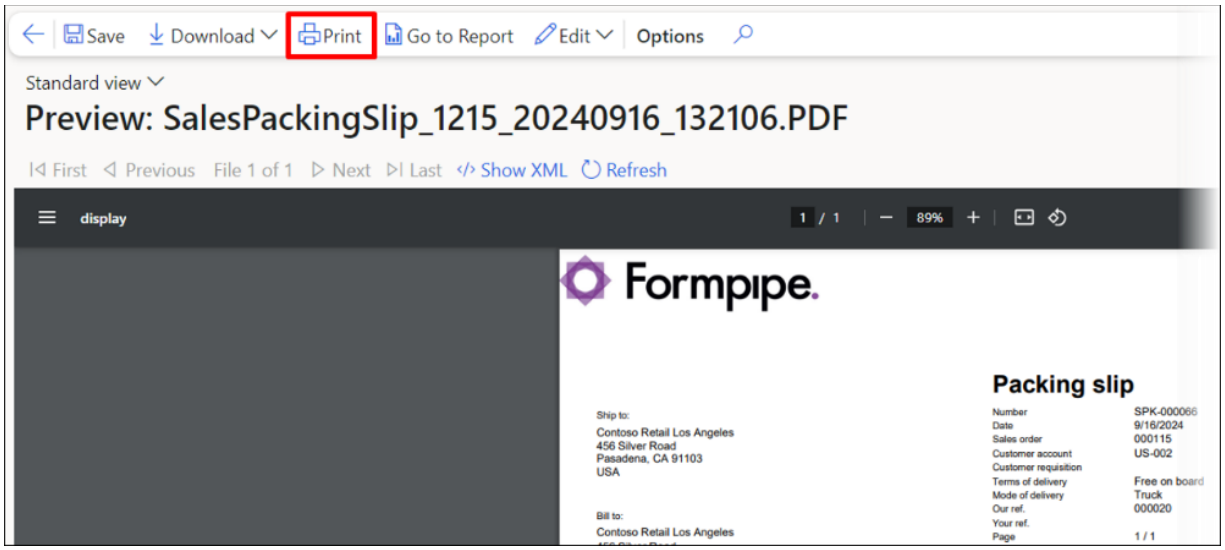
Preview



The option to **Resend** is not available for Proforma reports, even within the workspace, if no single entry exists for the report within the **Lasernet Archive**.



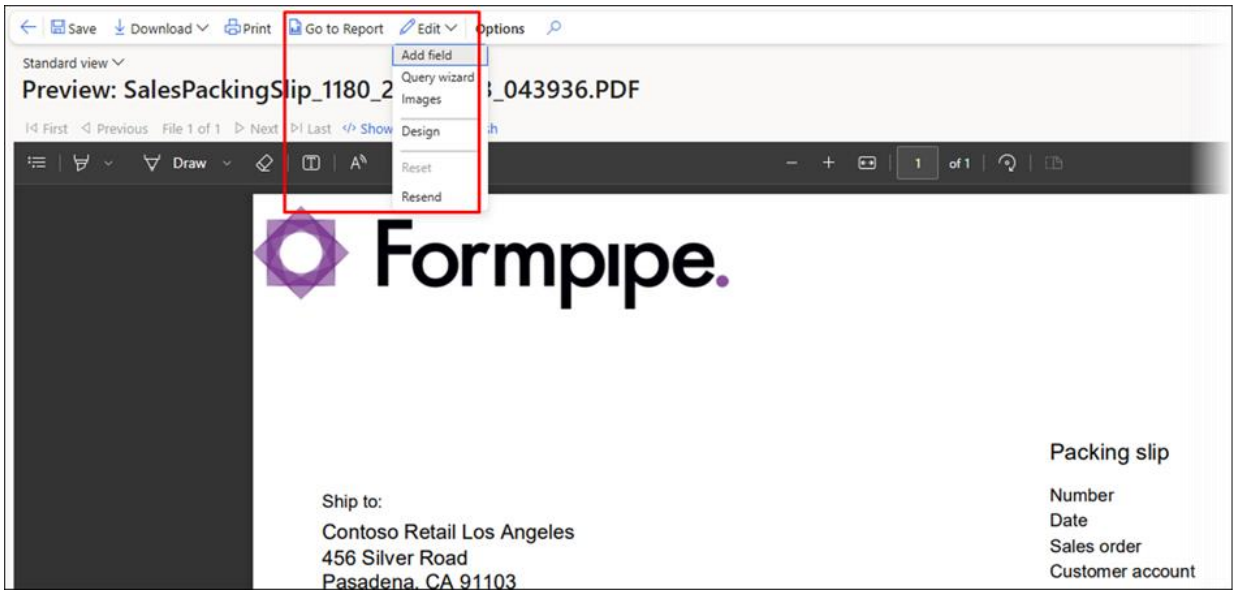
Additionally, the **Print** option is disabled for Proforma reports. This feature is available only for non-Proforma versions.



All **Edit** options, apart from **Destinations**, are located in both the **Preview** and within the workspace.

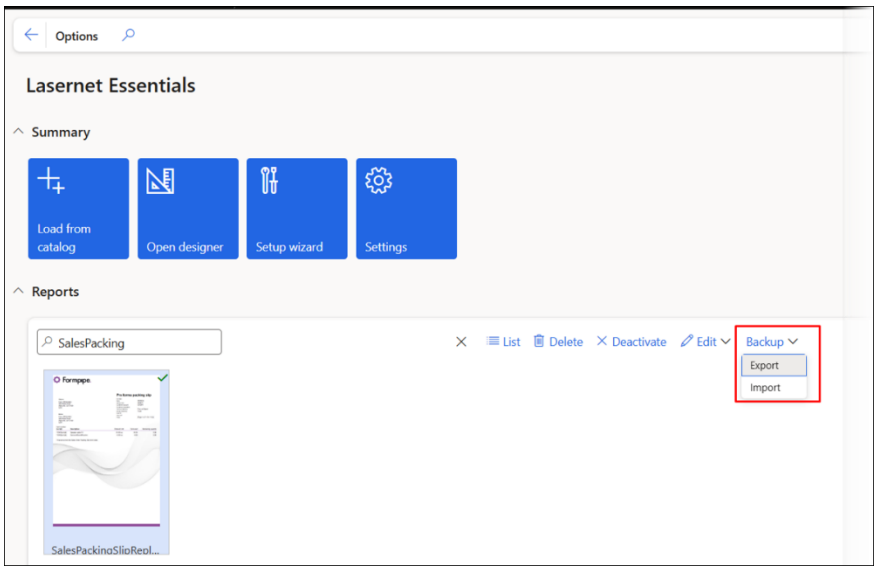
Destinations are only accessible from the workspace in the **Edit** dropdown menu.

You can access these options from the **Preview** unless they have been disabled within the **Lasernet parameters**.



5.2.5 Backup

The **Backup** function available in the **Reports** sections of the **Lasernet Essentials** workspace enables users to **Export** and **Import** reports.

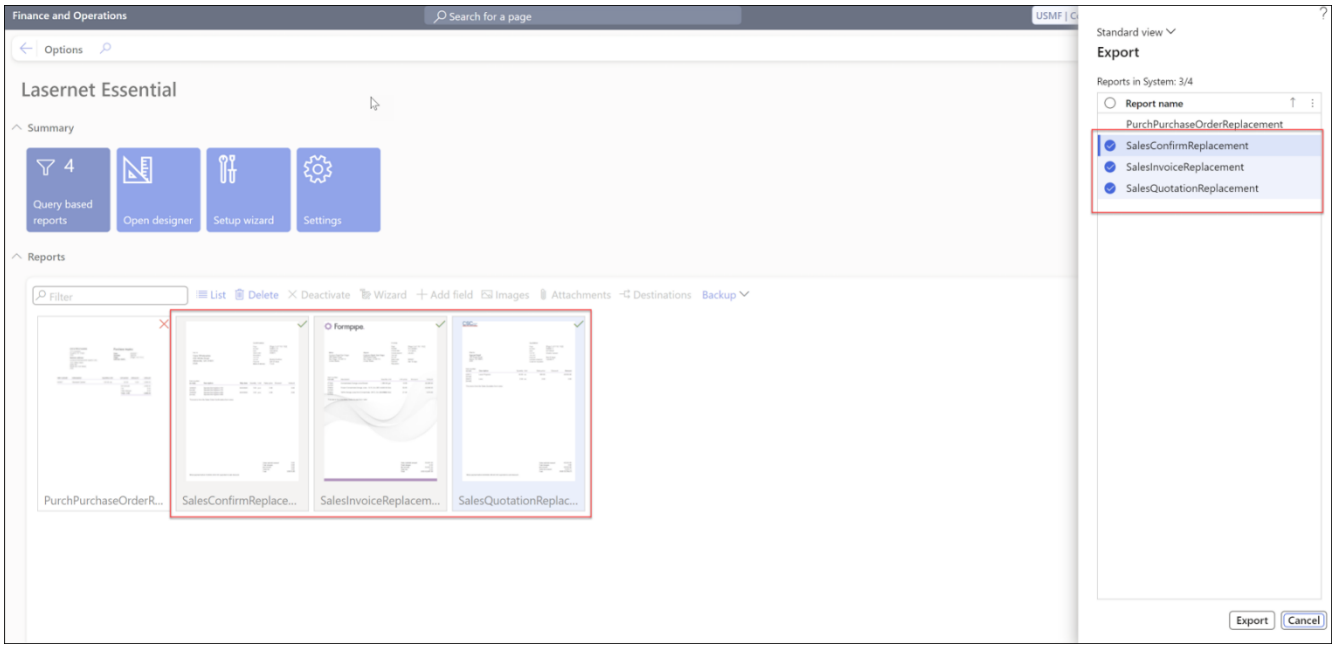


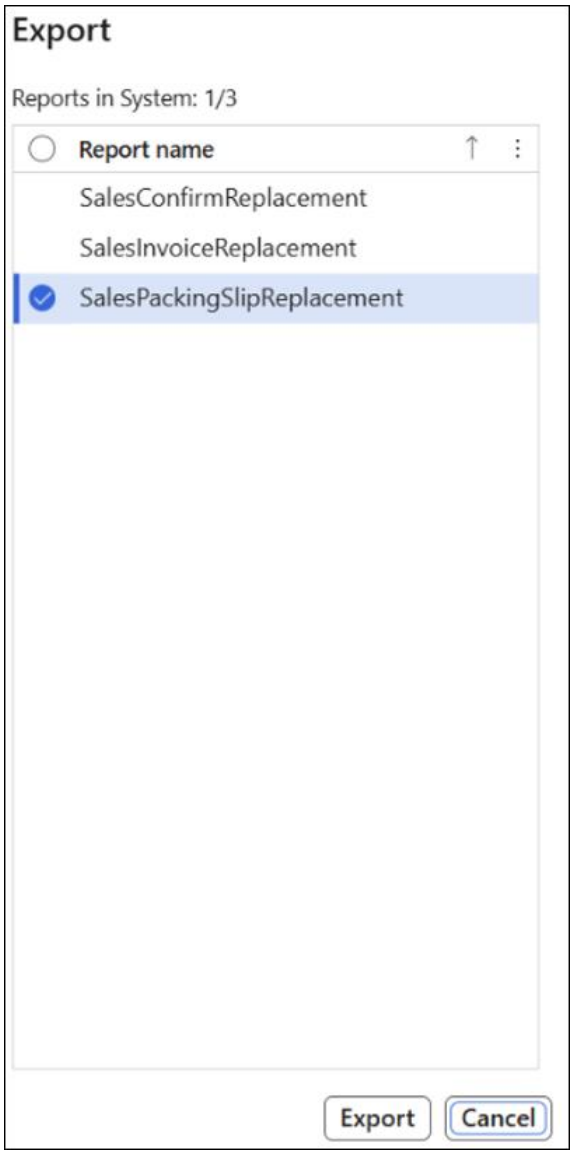
Read the following sections to learn how this feature works.

5.2.5.1 Export

The **Export** function is useful for moving a report from one legal entity to another or a new FO environment.

It is possible to export one report at a time or multiple reports together.

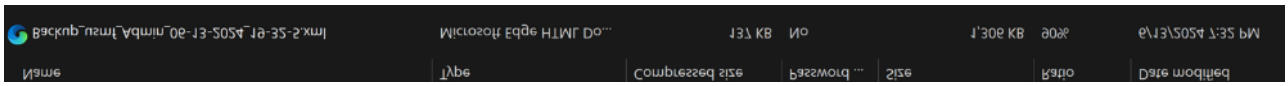

Finance and Operations
Search for a page
Options
Lasernet Essential
Summary
4
Query based reports
Open designer
Setup wizard
Settings
Reports
Filter
List
Delete
Deactivate
Wizard
Add field
Images
Attachments
Destinations
Backup
PurchPurchaseOrderR...
SalesConfirmReplace...
SalesInvoiceReplacem...
SalesQuotationReplac...
Standard view
Export
Reports in System: 3/4
Report name
PurchPurchaseOrderReplacement
SalesConfirmReplacement
SalesInvoiceReplacement
SalesQuotationReplacement
Export
Cancel



When using the **Export** function, the system includes both the required information in Dynamics and the report design(s).

Both the original SSRS report and the replacement report for the SSRS report are included in the export.

The export XML is downloaded as a compressed ZIP file with a single XML inside.



The name of an export file containing a single report includes the **Report name**, **Company**, **User**, and **Current Date & Time**, such as:

Backup_SalesPackingSlipReplacement_usmf_Kim.Agerholm_09-03-2024_11-53-49.zip

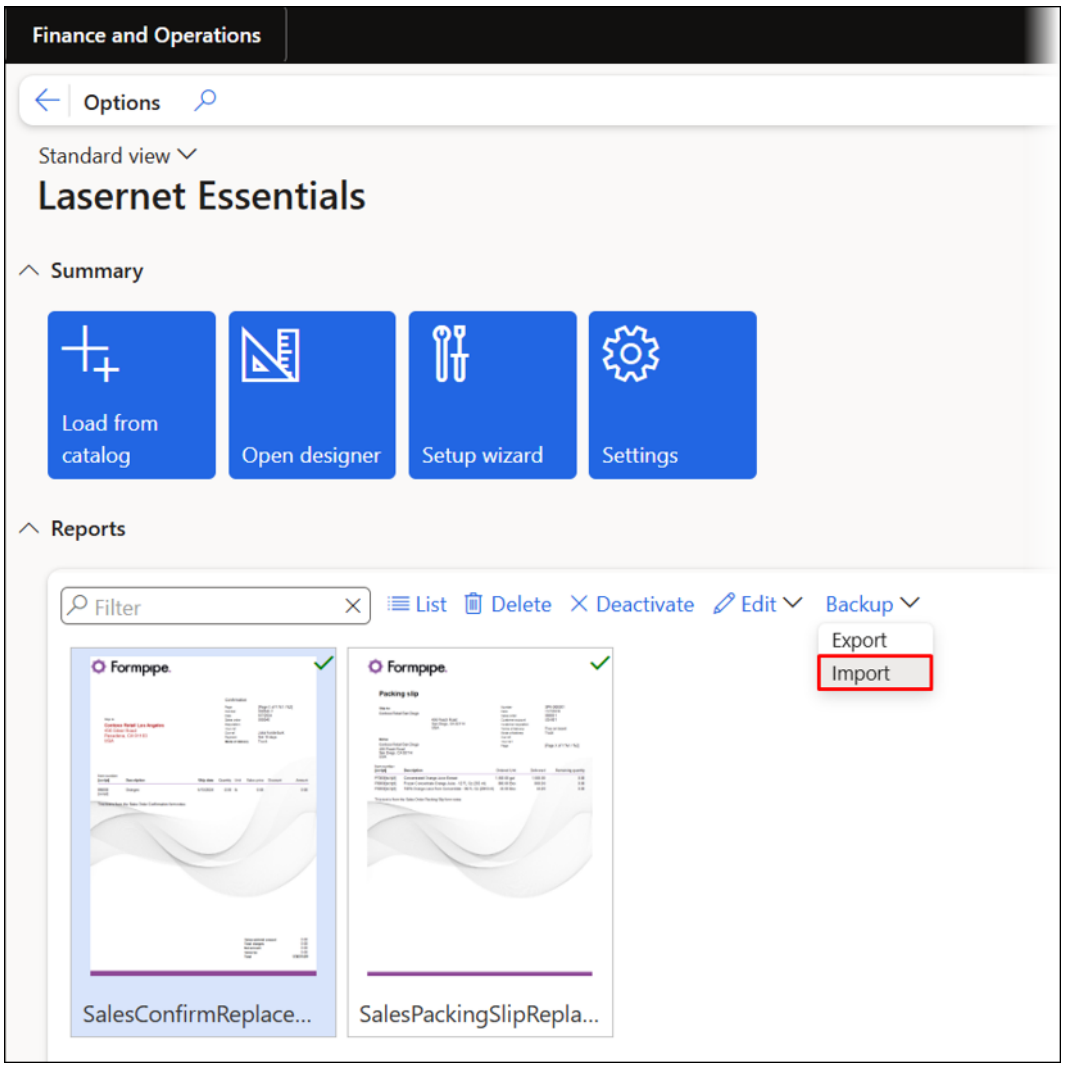
Whereas the name of an export file containing multiple reports does not include the **Report name**, such as:

Backup_usmf_Kim.Agerholm_09-03-2024_11-58-8.zip

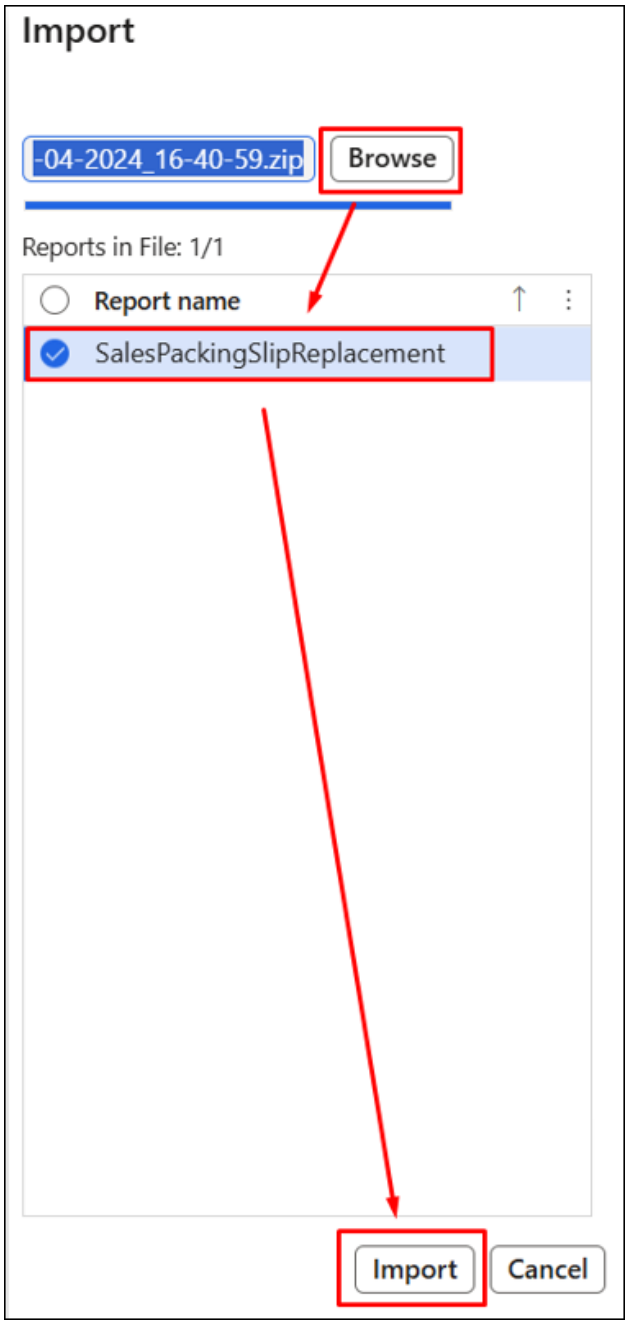
5.2.5.2 Import

Follow these steps to use the **Import** function:

1. Ensure you are in the new legal entity or environment, then select **Import** from the **Backup** dropdown menu.

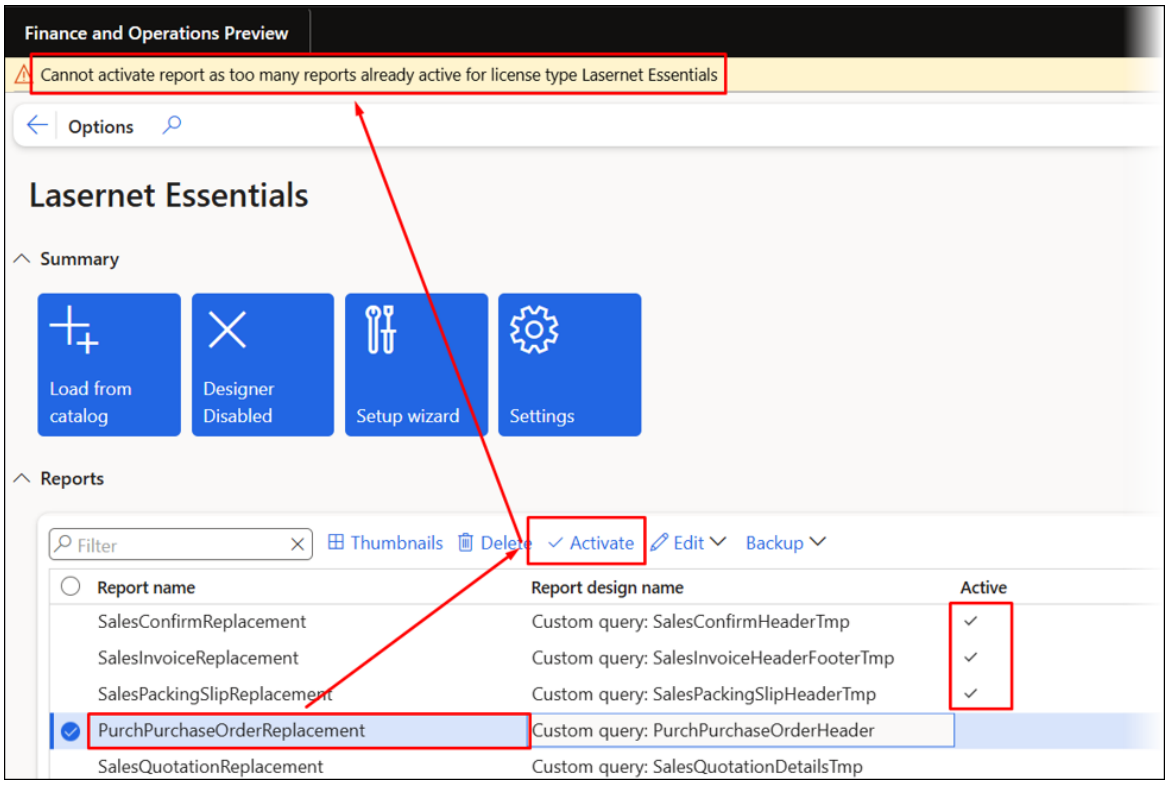


2. Select the required file with the configuration that should be imported. The extension for the file must always be .zip, and it is possible to import either a single report or multiple reports.



Once imported, the report is activated and added to your **Lasernet Essentials** workspace.

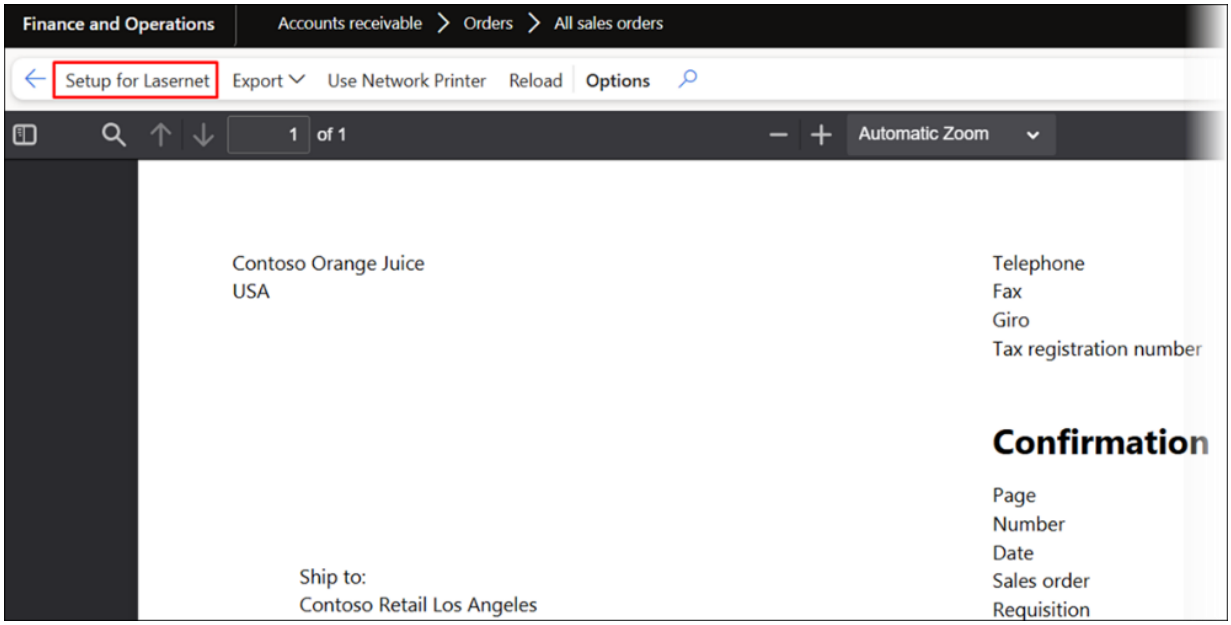
A warning appears when trying to activate more than three reports in Lasernet Essentials, as only three reports can be active at one time. Importing more than three reports will only activate three reports.

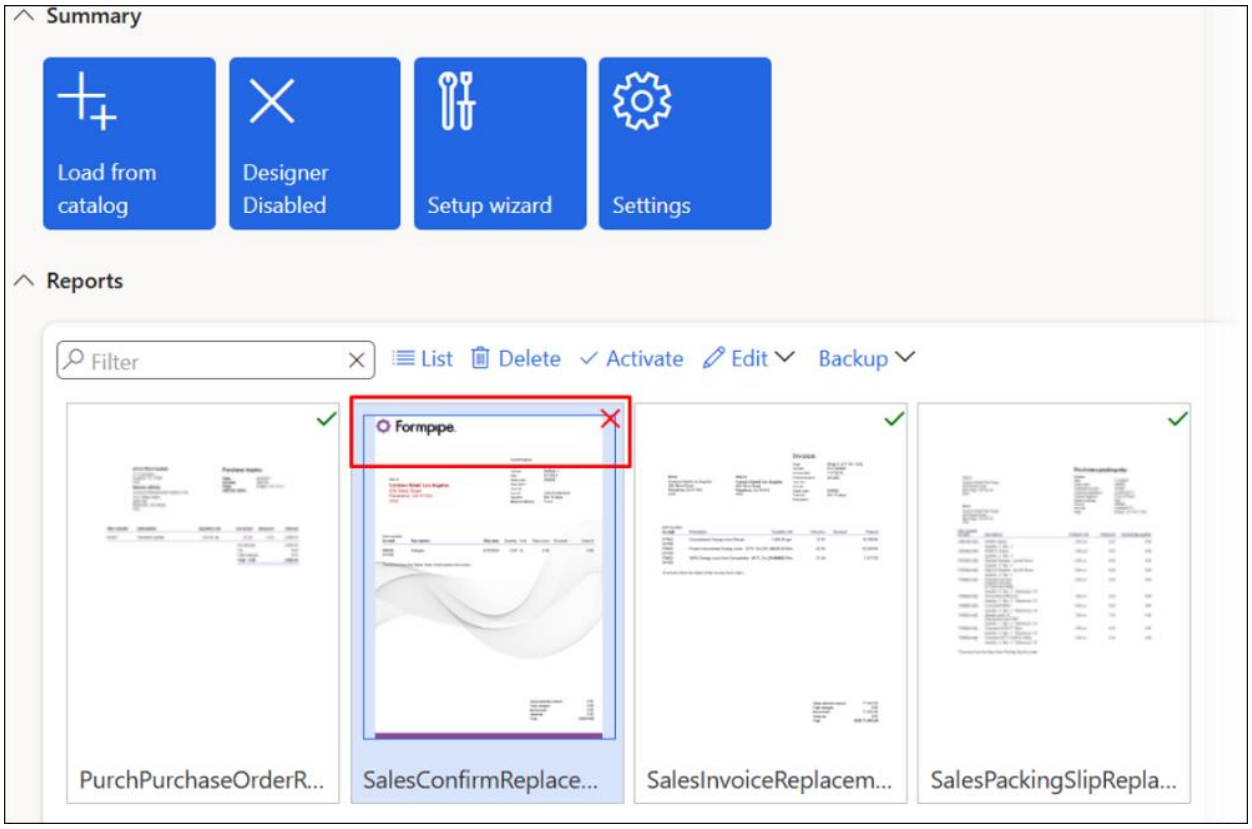


Warning

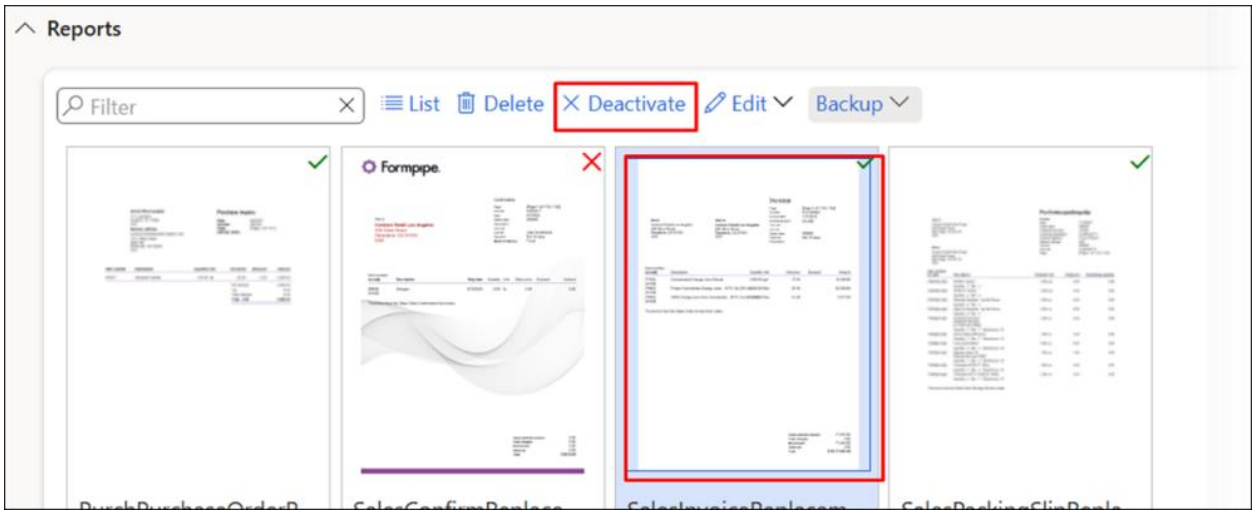
Cannot activate report as too many reports already active for license type Lasernet Essentials

Adding a new report when three reports are already activated configures the report but marks it as inactive.



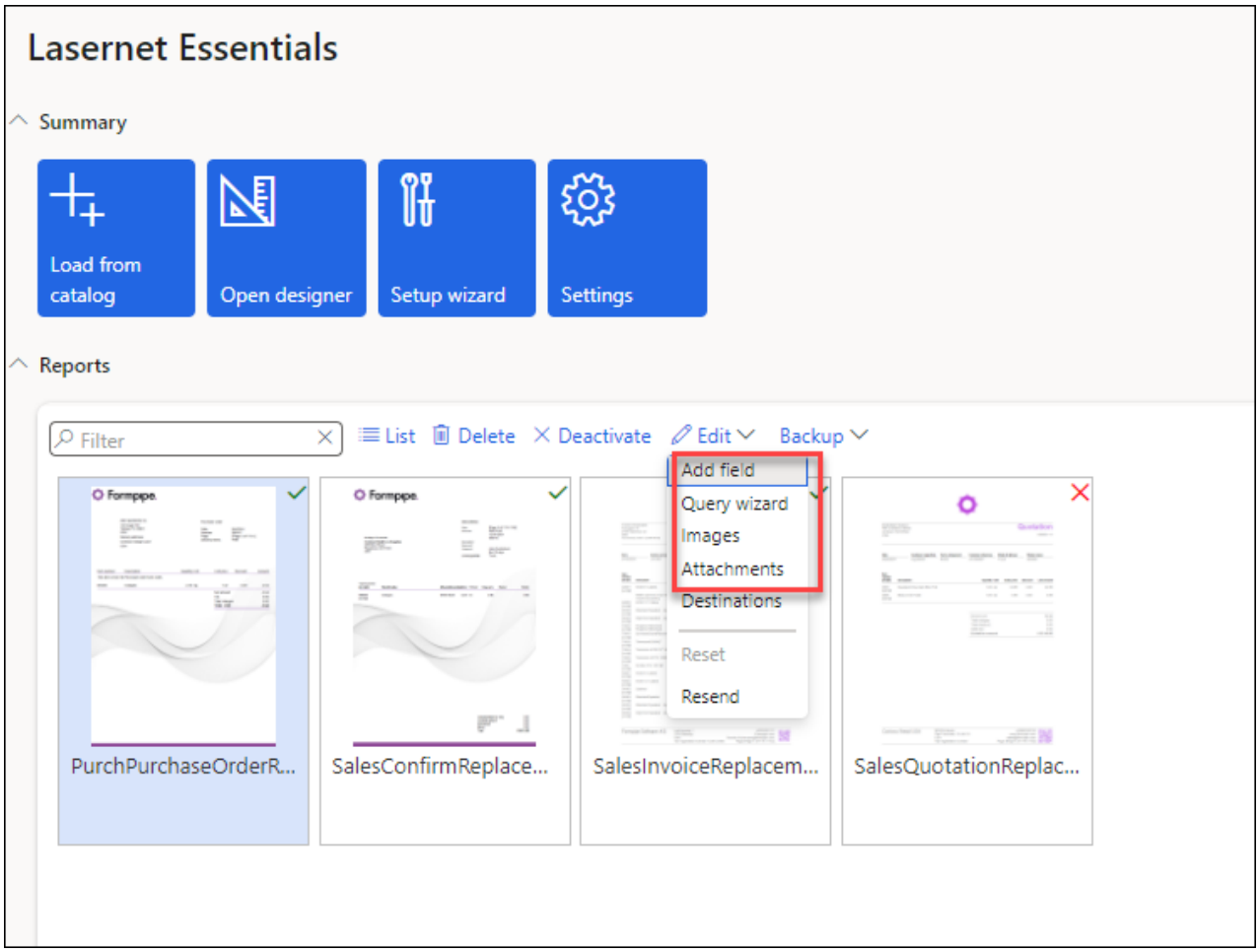


Deactivating one of the other reports will enable the report to be activated.



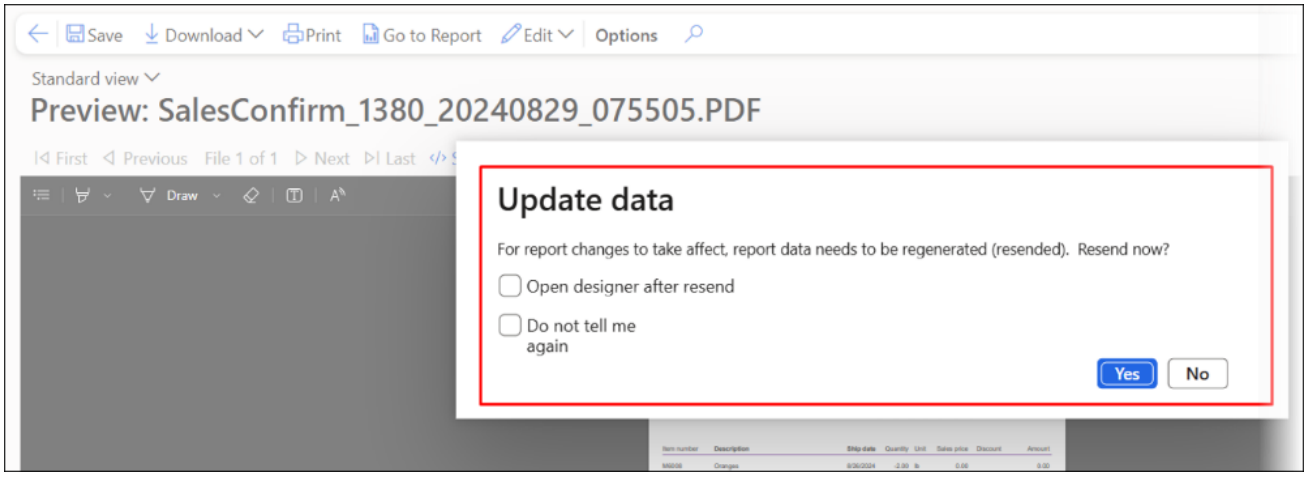
5.2.6 Auto Update

A powerful option to automatically re-execute a report has been introduced in the Lasernet Essentials when using **Add field**, **Query wizard**, **Images**, or **Attachments** from the **Lasernet Essentials** workspace **Edit** dropdown menu.



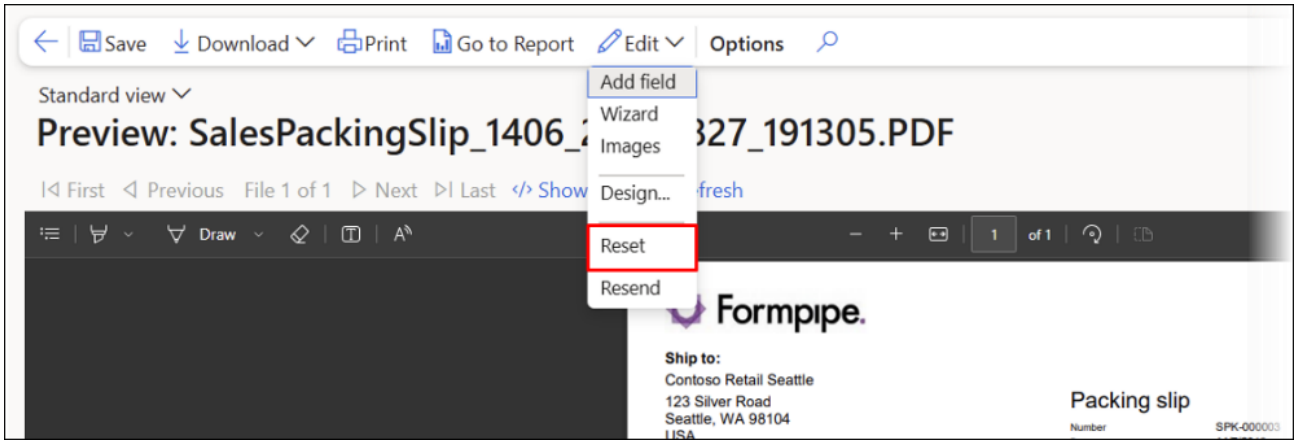
The following prompt is displayed to enable users to automatically regenerate the report directly from the workspace or from the **Preview**.

Resending a report will ensure additional tables, fields, images, and attachments are added even when the report **Preview** is already open or when working within the workspace.

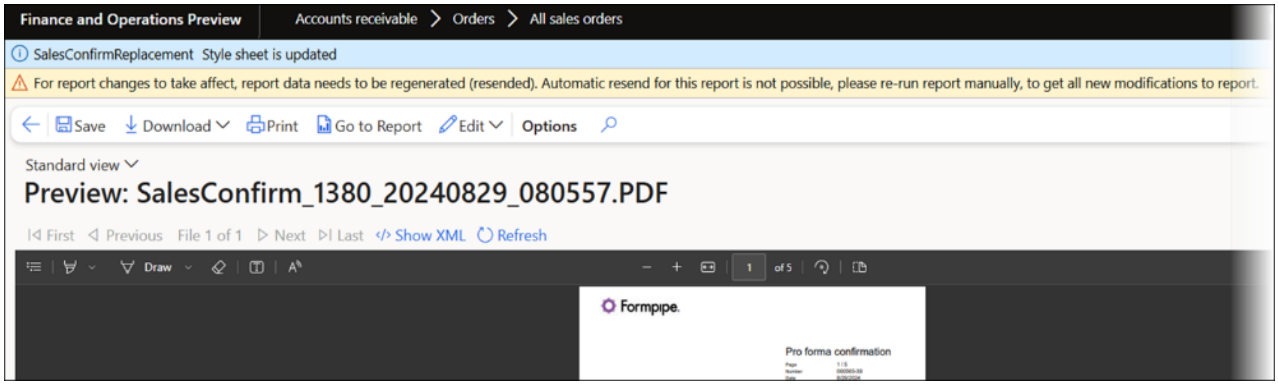


- **Open designer after resend**: This option will automatically open the Lasernet Form Editor after the report has been regenerated.

- **Do not tell me again**: This option will prevent the prompt from being displayed on the next occasion (you must also click **No**). The **Reset** button in the **Edit** dropdown menu of the report **Preview** is used for resetting the current choice.



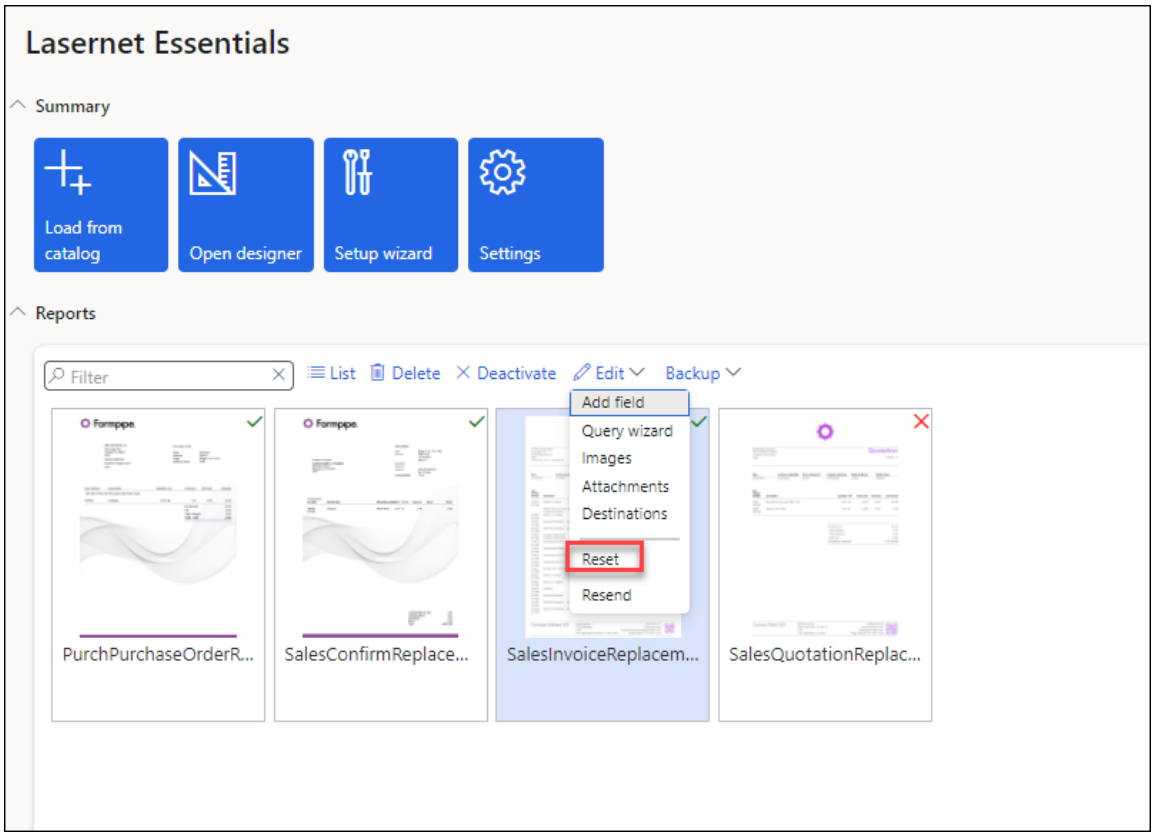
For Proforma reports, the following warning will appear, as the **Journal** does not contain any records:



Warning

For report changes to take effect, report data needs to be regenerated (resent). Automatic resend for this report is not possible, please re-run report manually, to get all new modifications to report.

You will be able to reset this selection via the **Reset** option from the **Edit** dropdown menu.


Lasernet Essentials
Summary
Load from catalog
Open designer
Setup wizard
Settings
Reports
Filter
List
Delete
Deactivate
Edit
Backup
Add field
Query wizard
Images
Attachments
Destinations
Reset
Resend
PurchPurchaseOrderR...
SalesConfirmReplace...
SalesInvoiceReplacem...
SalesQuotationReplac...

6 OneClick.

he **OneClick** function offers a highly efficient way to seamlessly incorporate a field into a report.

Lasernet Essentials and Lasernet FO Connector 7.0 include an enhanced version of **OneClick**.

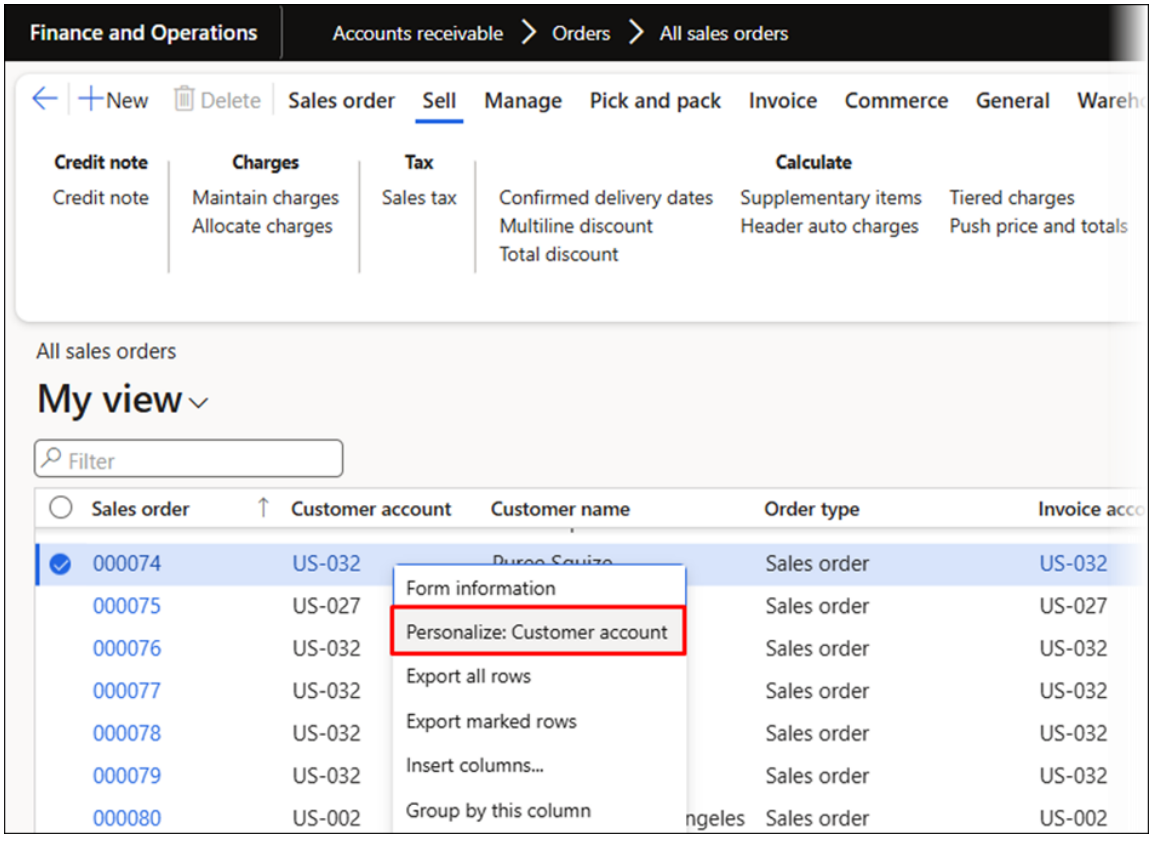
In previous versions, new tables and fields were added to the report's **Structure/Elements**. Now, with **OneClick**, the system inserts the data directly into the Query.

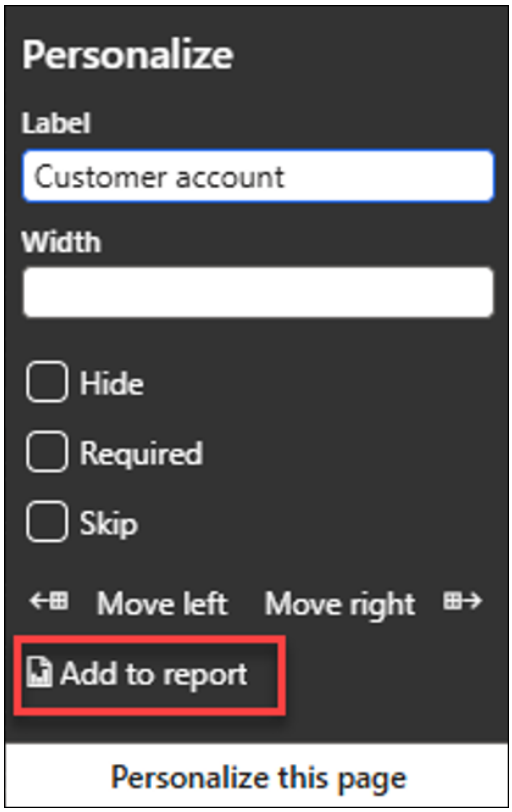
This solution aims to guarantee optimal performance and include everything within the **Query wizard**. **OneClick** also automatically adds labels to the fields.

Follow these steps to use **OneClick** in Lasernet Essentials:

1. Navigate to **Accounts receivable** > **Orders** > **All sales orders**, and select your record.

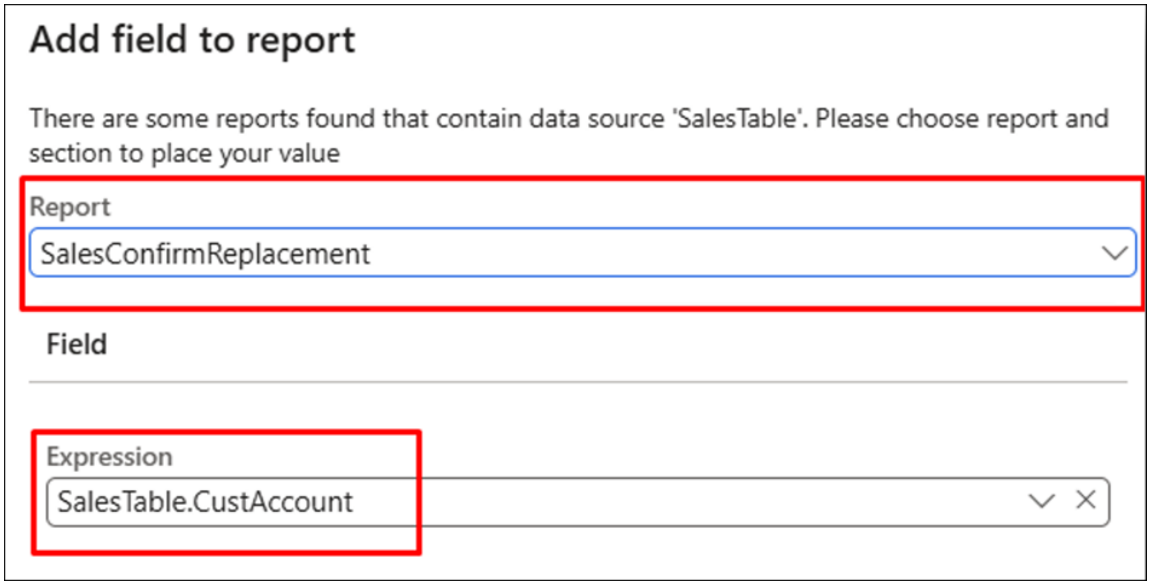
2. Right-click and select **Personalize**.



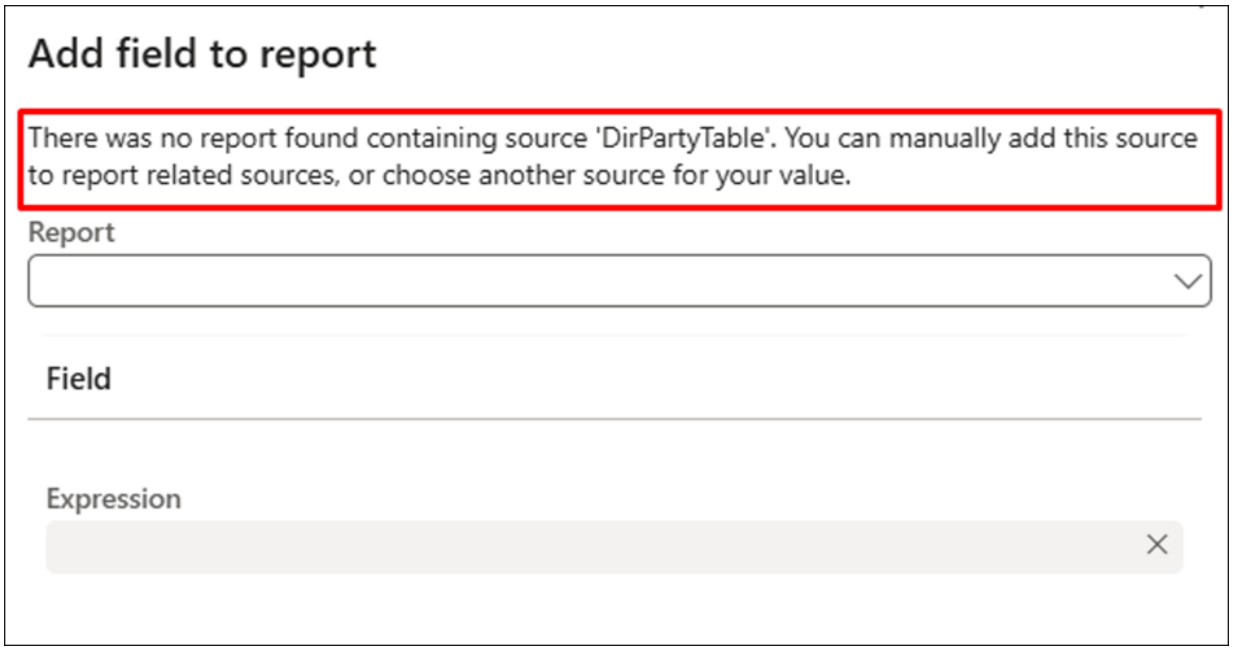


3. Select the desired report.

It is possible to change the table and field name. However, only tables that have already been added to the report via the **Query wizard** can be used.



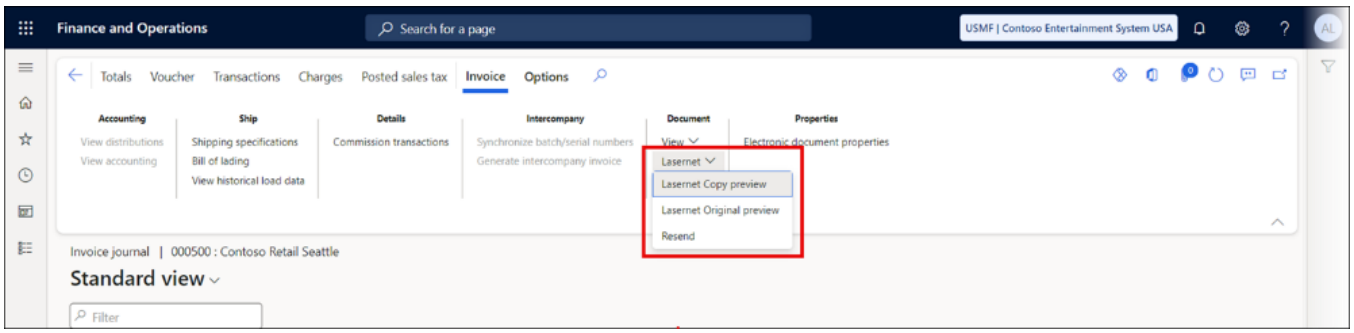
If no reports contain the table used for the field where **OneClick** was initiated, the following will be displayed:


Add field to report
There was no report found containing source 'DirPartyTable'. You can manually add this source to report related sources, or choose another source for your value.
Report
Field
Expression

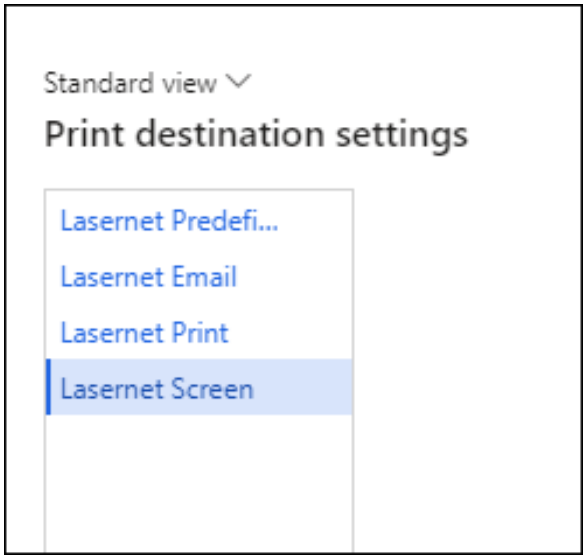
7 Print Preview.

7.1 Lasernet Print Destination Settings

The following options in the **Lasernet Print** menu are available:

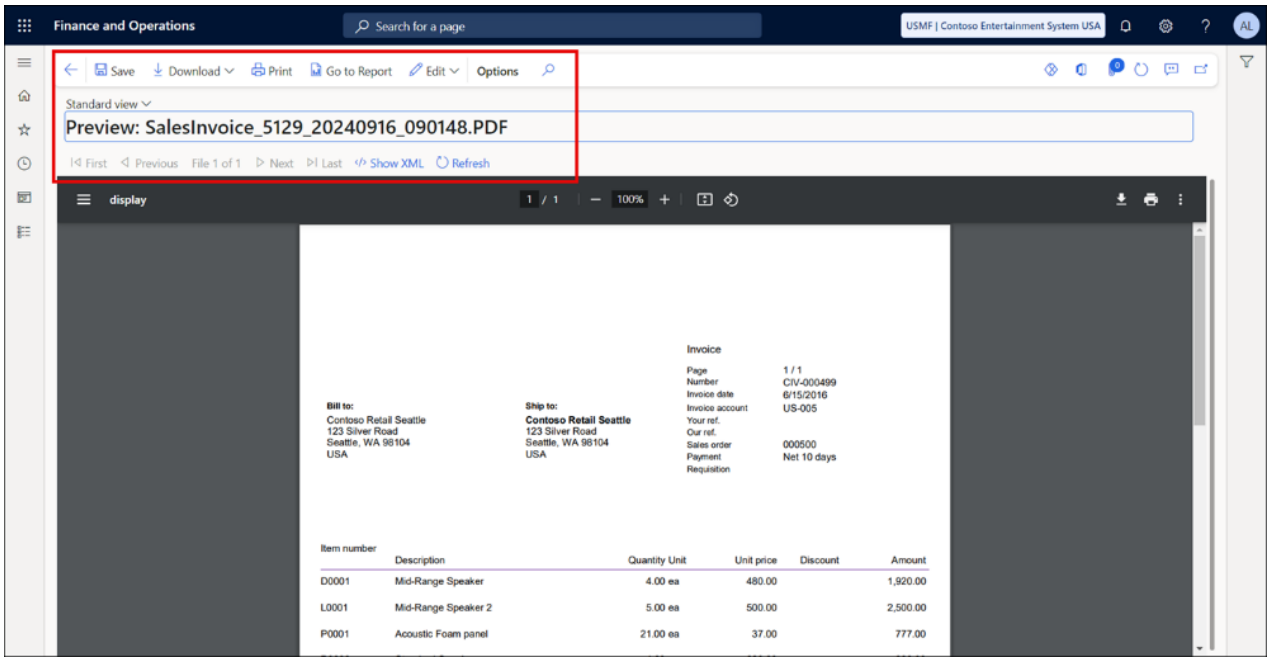


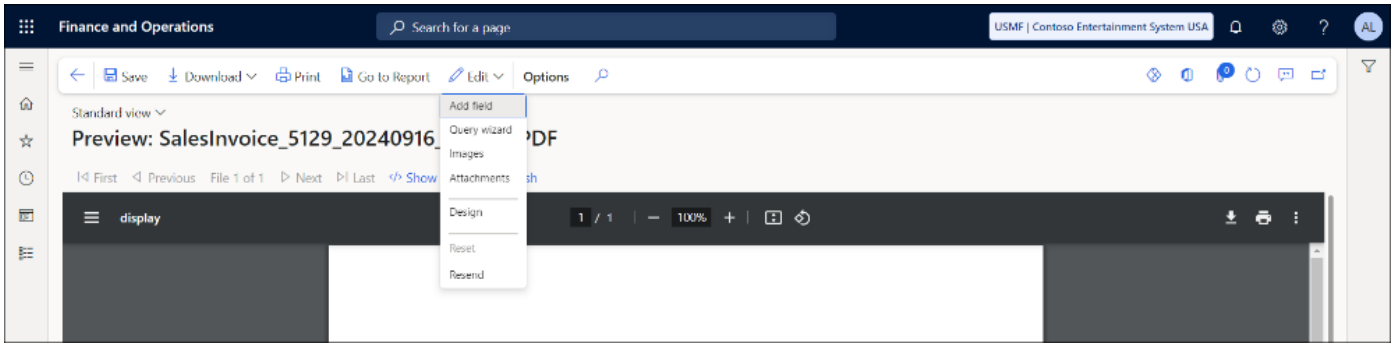
- **Lasernet Copy Preview**: Will print the report to the screen.
- **Lasernet Original Preview**: Will print the report to the screen.
- **Resend**: Print to screen, print to CPC printer, send an email, or use predefined destinations.



7.2 Print Preview Options

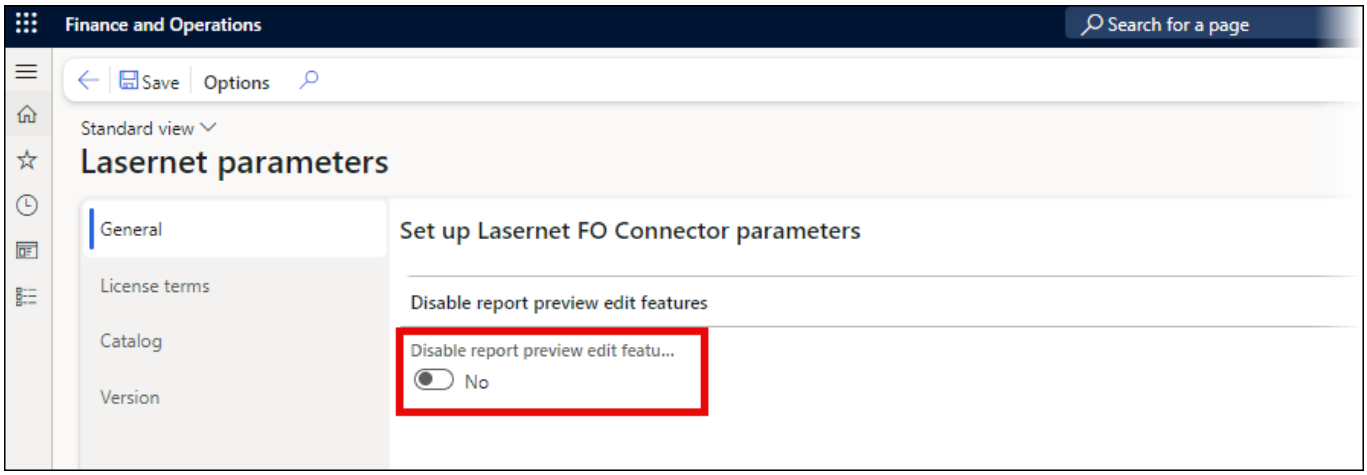
When printing a report to screen, many of the same features as in the **Lasernet Essentials** workspace will be available.





You will be able to preview, save, download (XML and PDF), and print directly from this screen, as well as open the report directly in the **Lasernet Essentials** workspace and access all the **Edit** button functions.

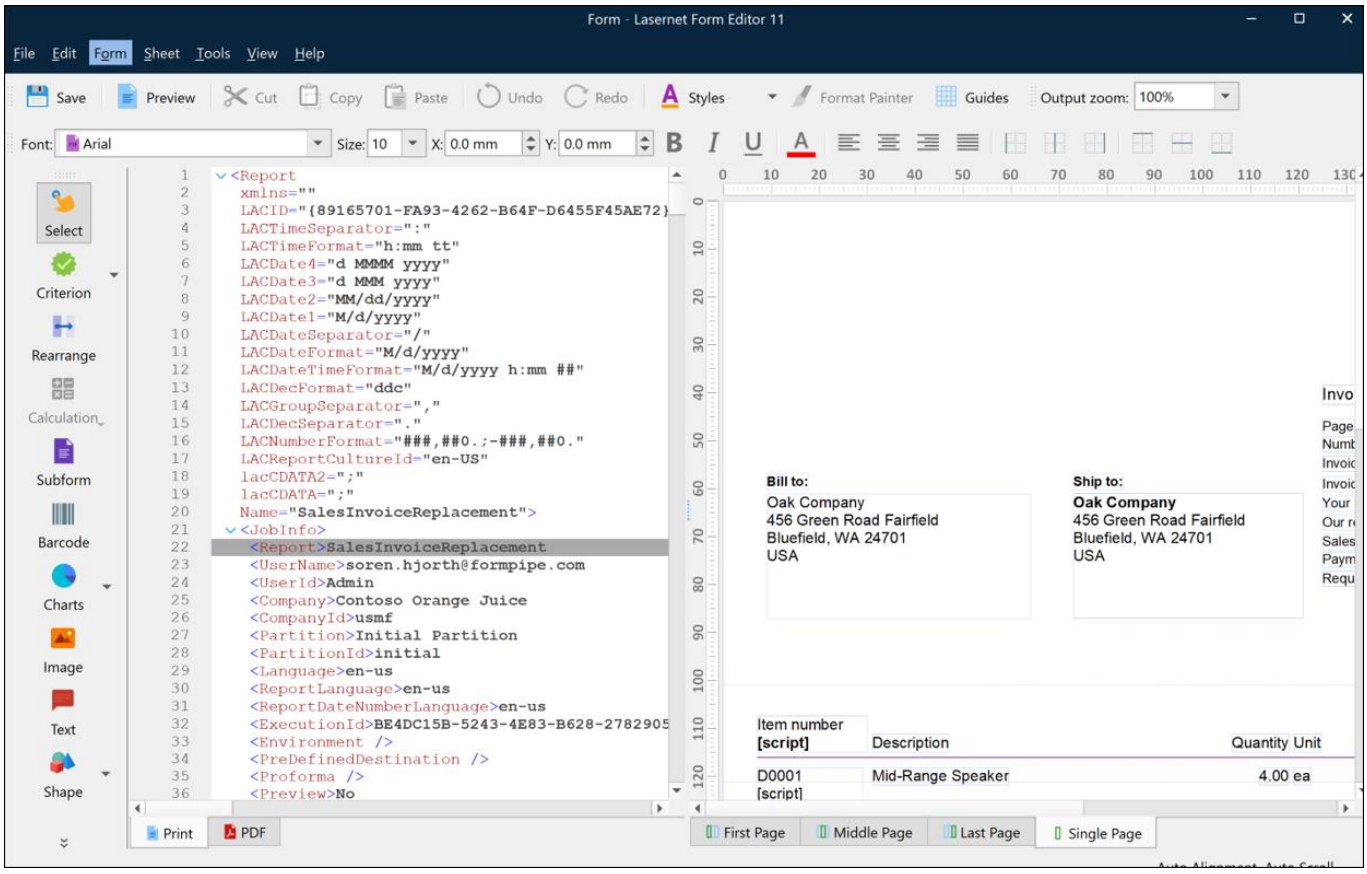
If you cannot see the **Edit** button on your report **Preview**, you may have disabled the following option on the **Lasernet parameters** page:


Finance and Operations
Search for a page
Save
Options
Standard view
Lasernet parameters
General
License terms
Catalog
Version
Set up Lasernet FO Connector parameters
Disable report preview edit features
Disable report preview edit featu...
No

8 Embedded Lasernet Form Editor.

While following the **Setup wizard** to configure your **Lasernet Essentials** workspace, you will be asked to download and install the embedded version of the Lasernet Form Editor.

This will look similar to the Lasernet Developer:



A comprehensive guide to the embedded Lasernet Form Editor is available.

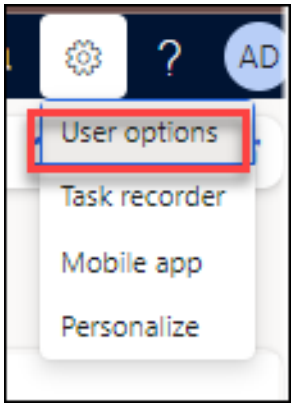
9 FO SMTP Setup.

Lasernet Essentials does not allow using the **Lasernet Email Output** modules; instead, it relies on the default FO SMTP setup. Your ERP partner should know how to set up and configure the FO SMTP. However, you can also find the instructions in the following sections.

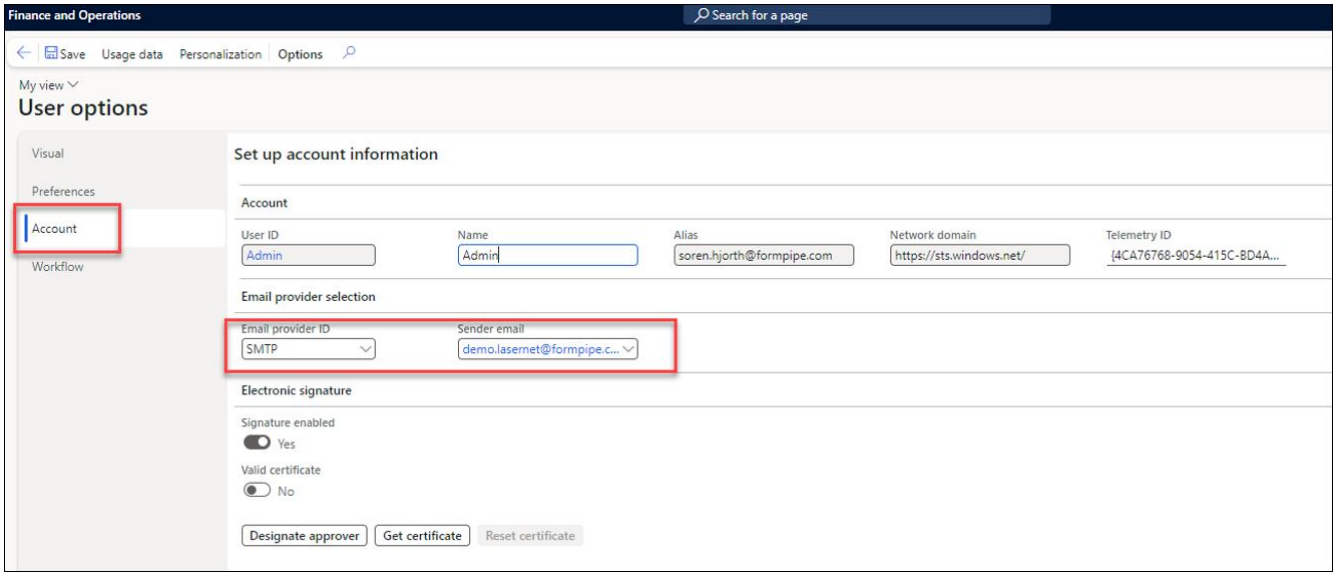
10 SMTP Configuration

Follow these steps to configure the FO SMTP:

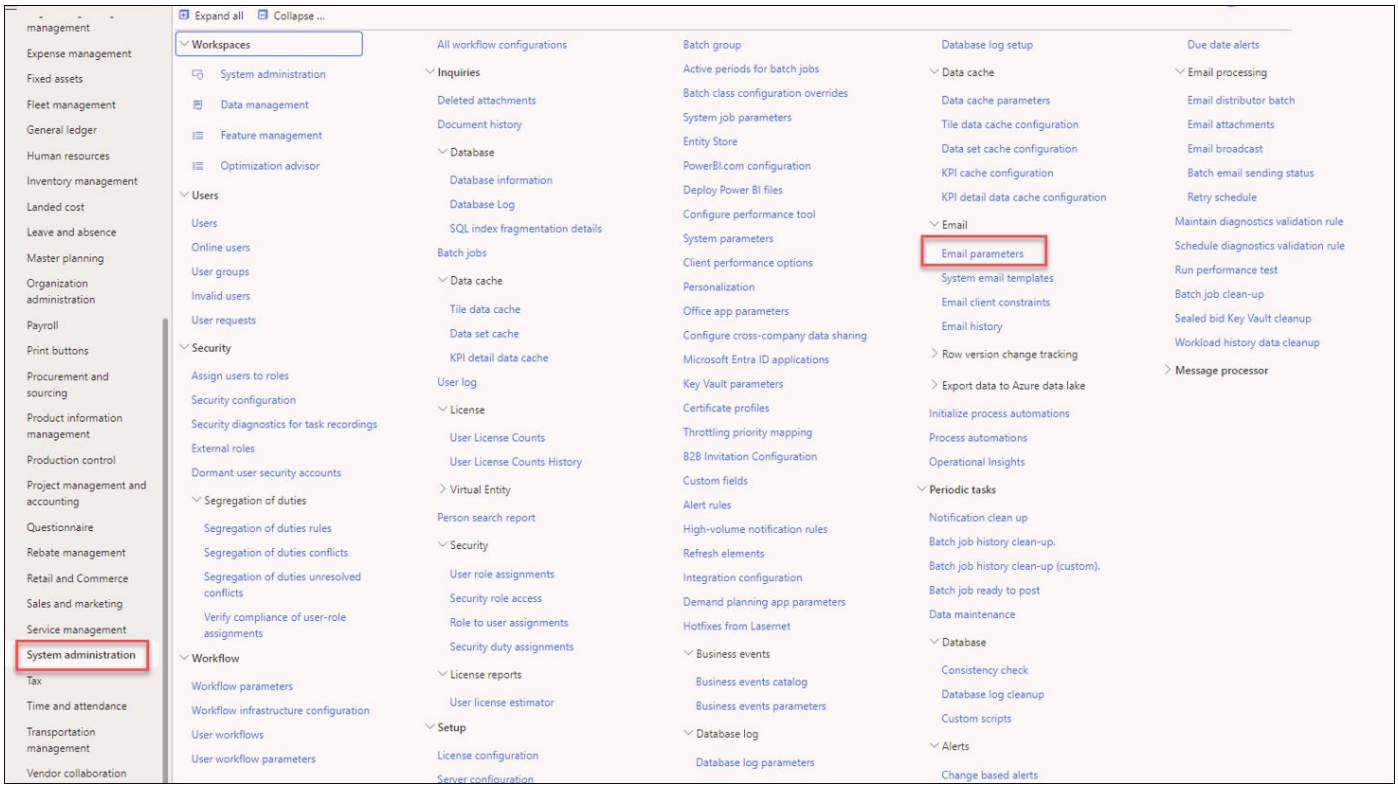
1. Start by configuring your user parameters. Click the settings icon in the upper right corner and select **User options**.



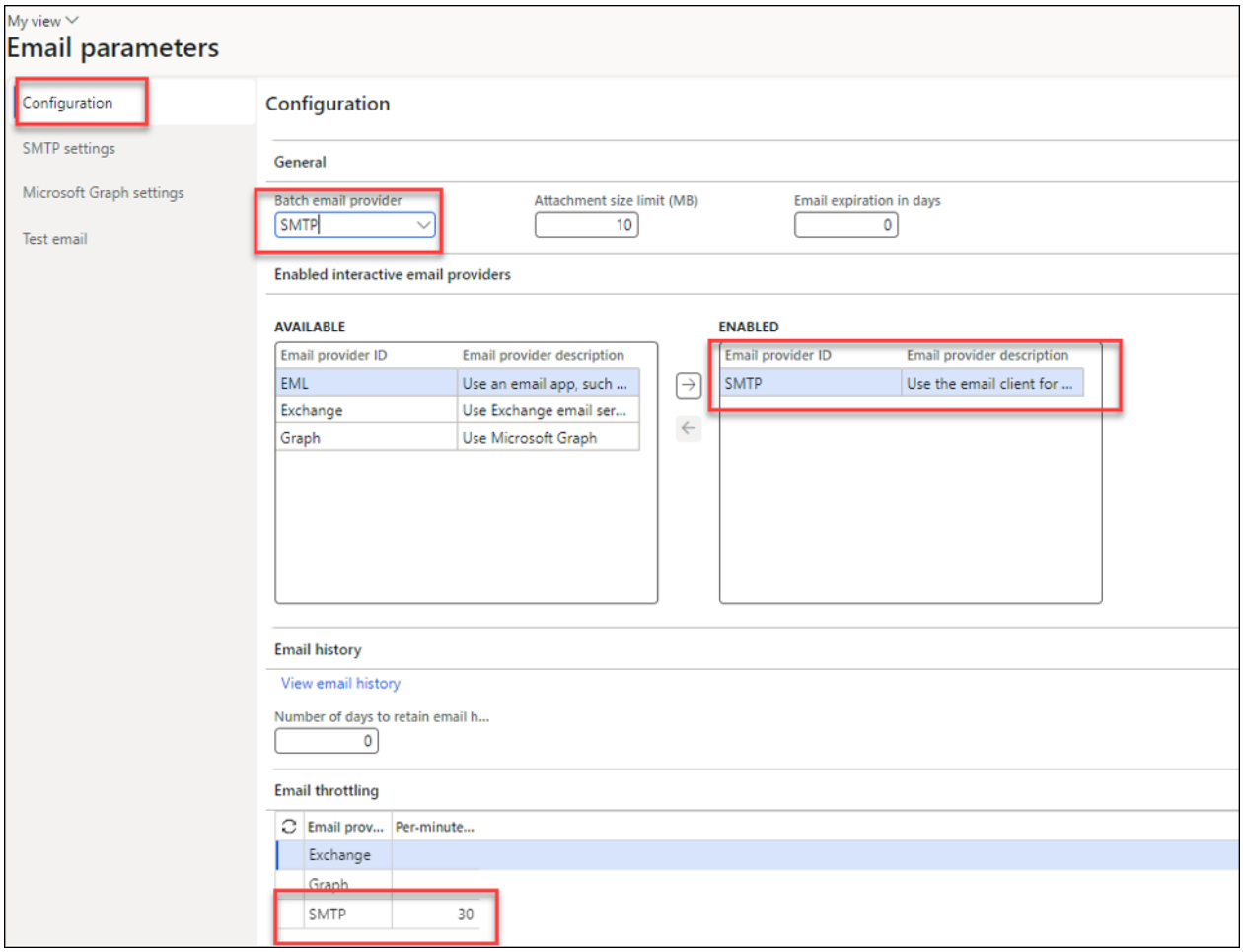
2. Navigate to the **Account** tab and ensure **SMTP** is selected as **Email Provider ID**. Then, add the email address you wish to use to send emails under **Sender email**.



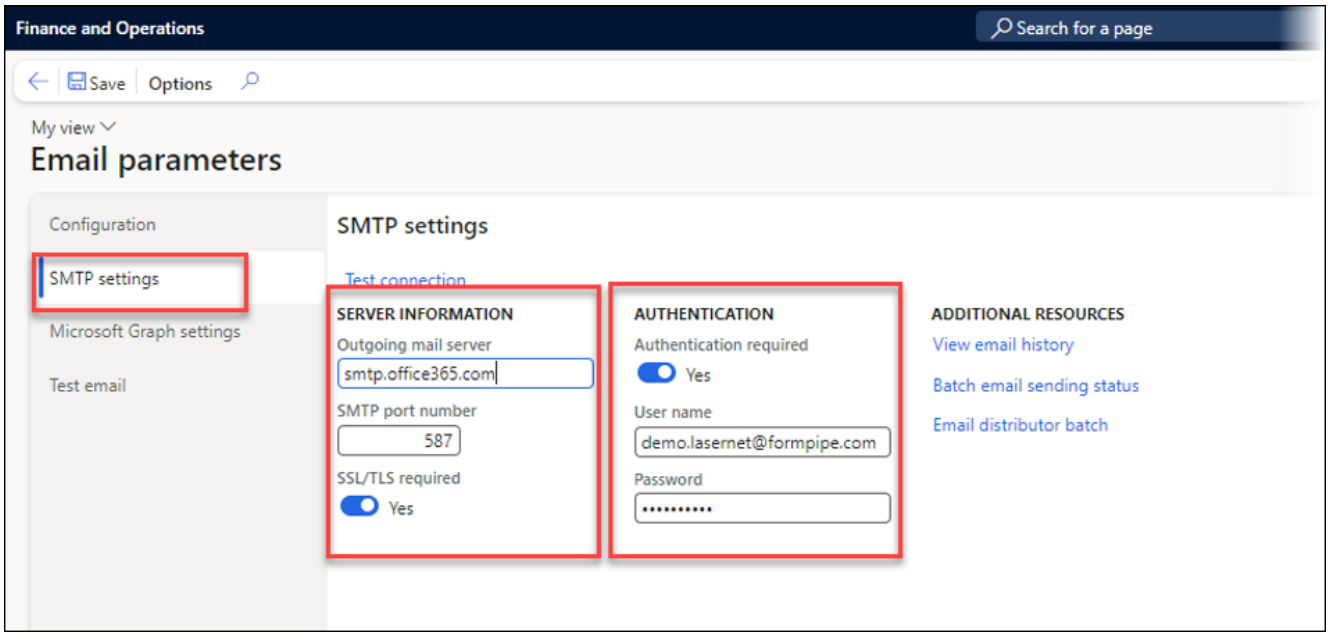
3. Navigate back to the FO homepage and then navigate to **System administration** > **Setup** > **Email** > **Email parameters**.



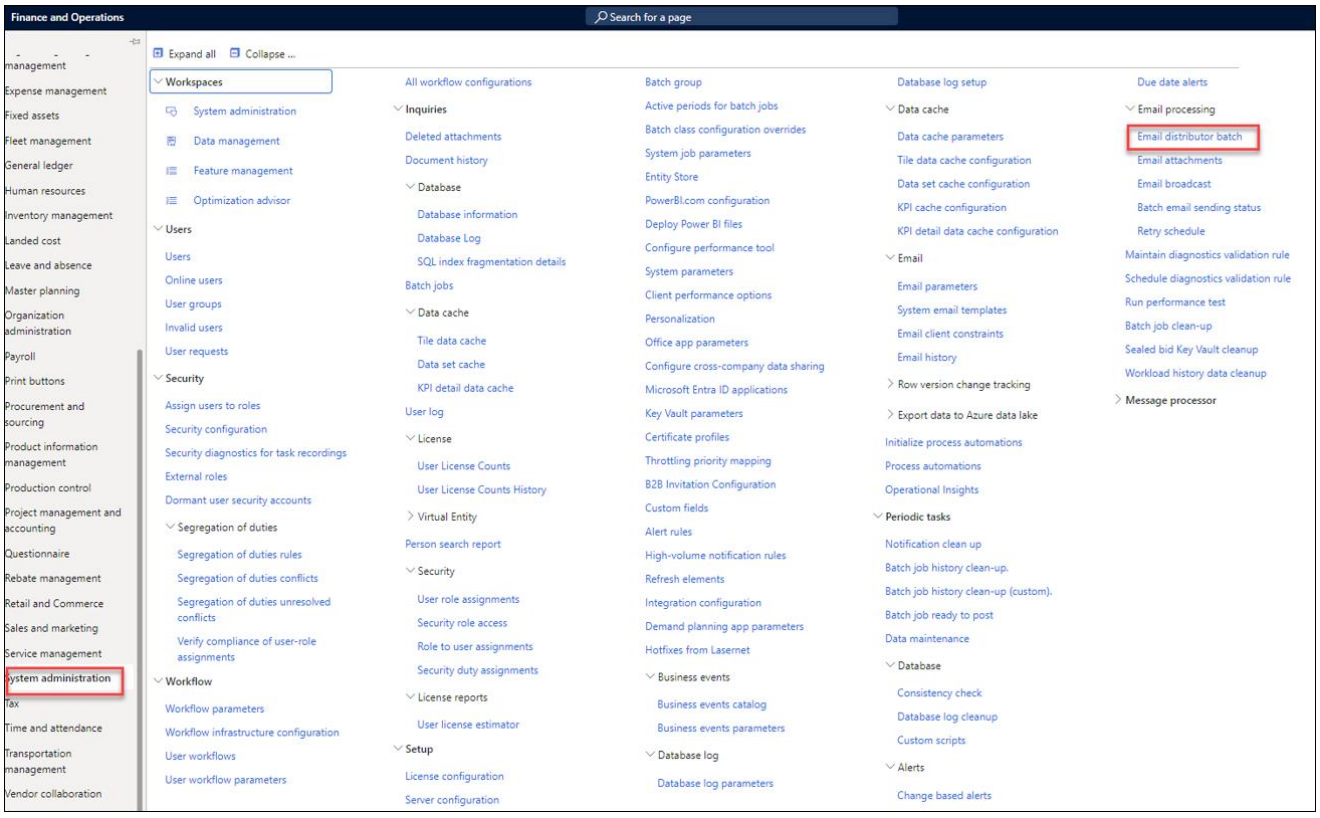
4. Select the **Configuration** tab and change the **Batch email provider** to **SMTP**. Ensure that **SMTP** is present under the **ENABLED** list and that **SMTP** is set to **30** email per minute.



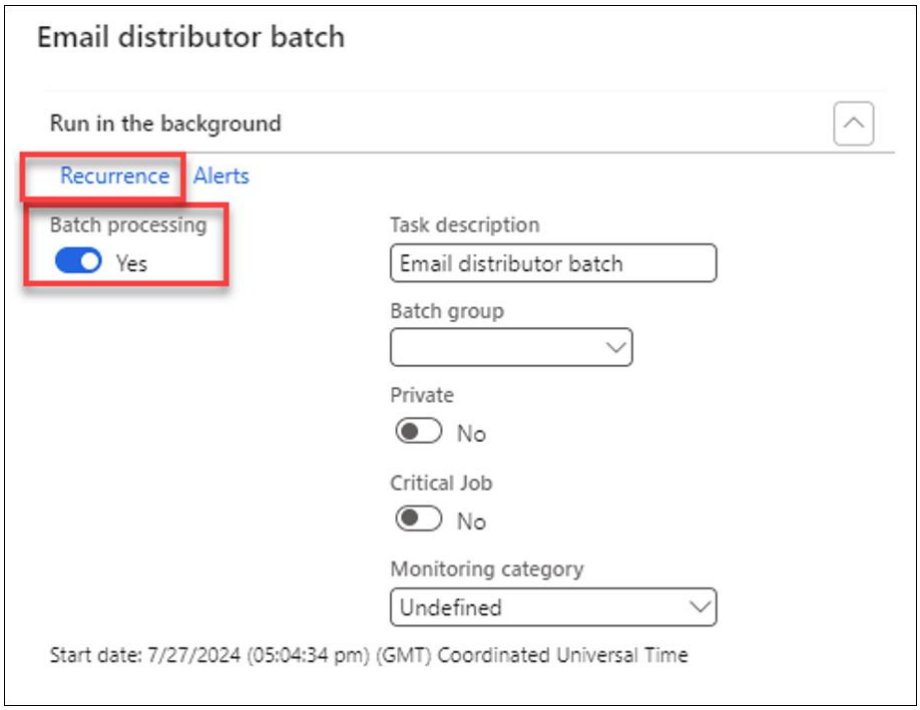
5. Open the **SMTP settings** tab. Type in your SMTP **SERVER INFORMATION** (**Outgoing mail server**, **SMTP port number**, **SSL/TLS required**). If your SMTP account requires authentication, toggle the **Authentication required** button to **Yes** and type in your **User name** and **Password**.



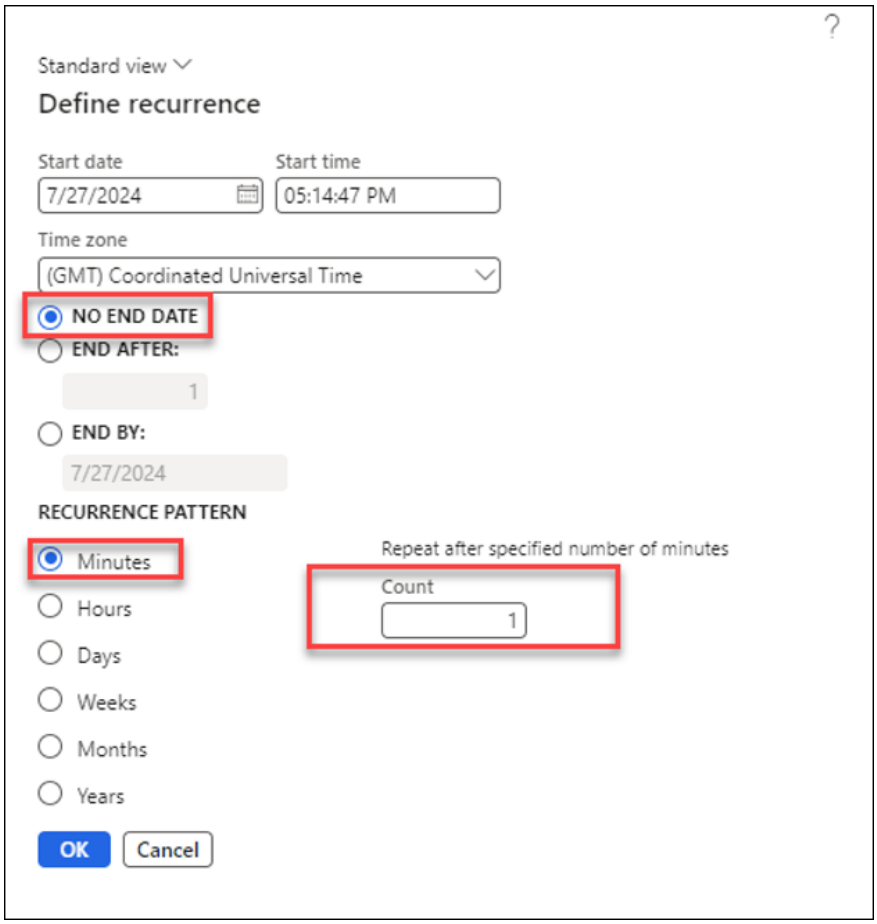
6. Once the SMTP server has been configured, you must create a batch job for email processing. Navigate to **System administration** > **Periodic tasks** > **Email distributor batch**.



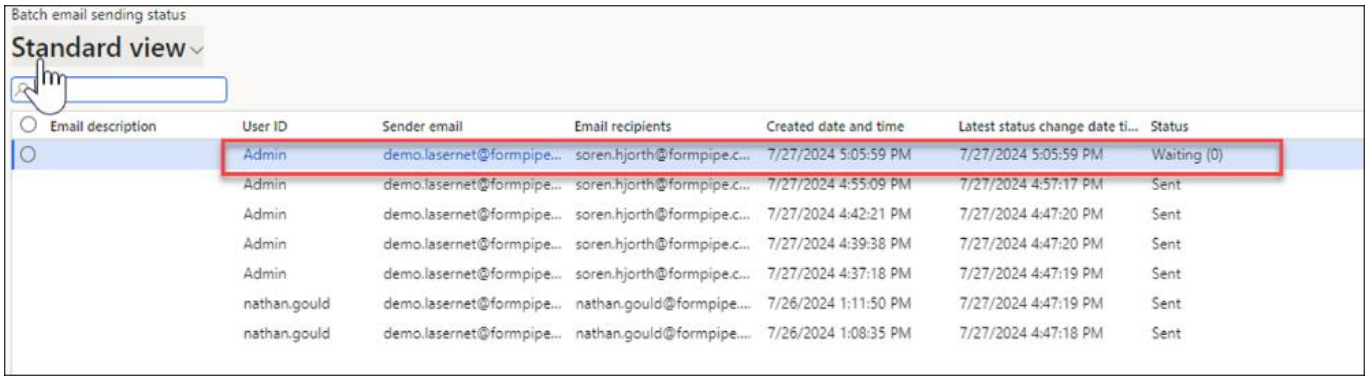
7. Toggle the **Batch processing** button to **Yes** and click **Recurrence**.



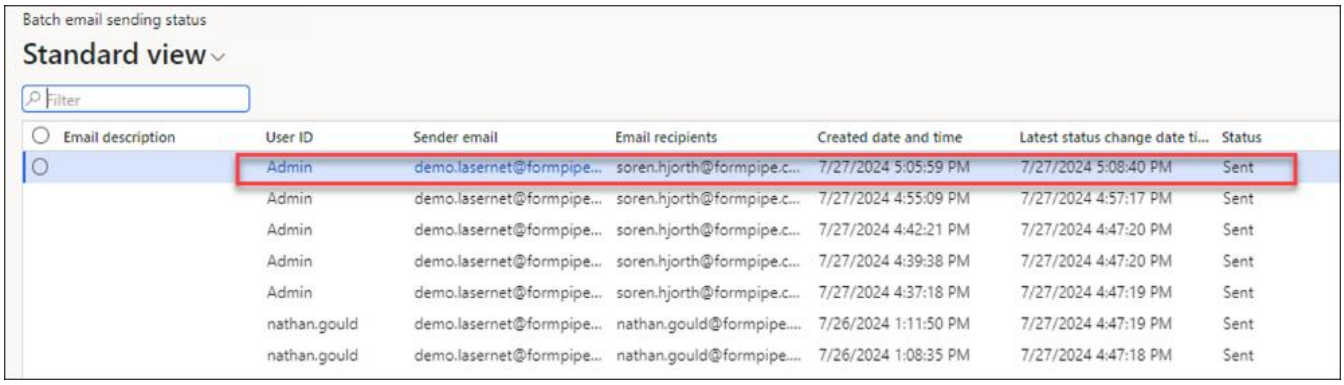
8. Configure your batch job to match your requirements. In this example, we have set it to run every minute with no end date. Then, click **OK**.



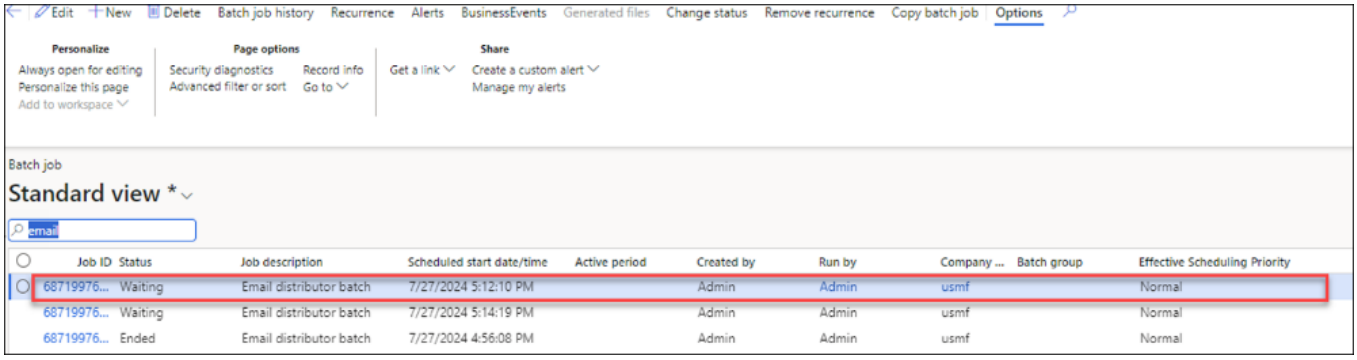
Whenever you send an email (manually or through a predefined setting), this enters the email queue.



Once the email is processed, the email queue looks as follows:



You can find the new batch job by navigating to **System administration** > **Inquiries** > **Batch job** and searching for **email**. The batch job will look as follows:

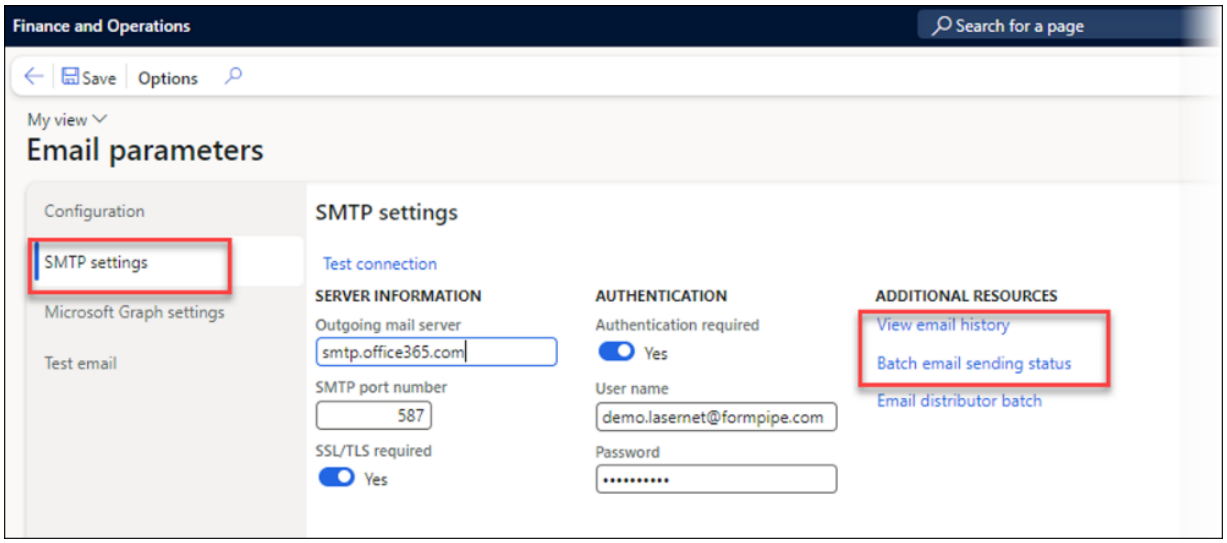


11 Email Status

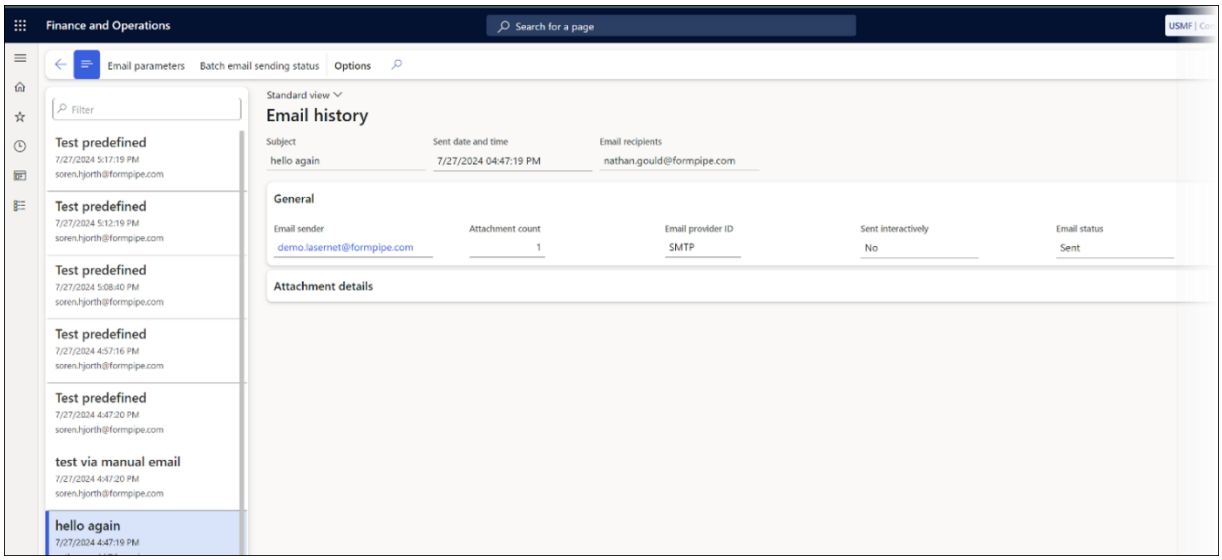
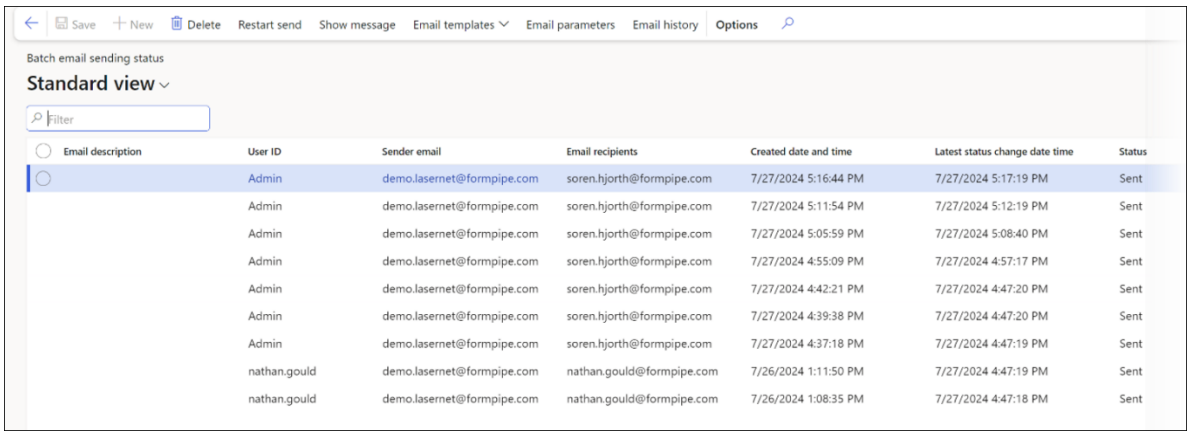
It is possible to check the status of the email batch job process and the history of emails sent. Follow these steps:

1. Navigate to **System administration** > **Setup** > **Email** > **Email parameters**.

2. Select the **SMTP settings** tab and choose either to **View email history** or **Batch email sending status**.



An example of **Email history**:



An example of **Batch email sending status**: