

# Lasernet Essentials User Guide.

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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
- <u>The Fastest Way To Get Started</u>
- 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 <u>Download</u> 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:

* +						
C LAC365FO_Version_6.30.0.2406261	Update64.zip > AOSS	Service > Packages >		Search Packages		
🖓 🙃 🕼 🖄 🗊 🛝 Sort - 🚍	View - 🔞 Extract all					🕕 Details
Name	Туре	Compressed size	Password	Size	Ratio	Date mod
Files	File folder					
dynamicsax-lacce.7.0.7279.40.nupkg	NUPKG File	31 KB	No	33 KB	6%	6/26/202
dynamicsax-lacmshotfixes.7.0.7279.40.nupkg	NUPKG File	31 KB	No	33 KB	6%	6/26/202
dynamicsax-lasemet.7.0.7279.40.nupkg	NUPKG File	31 KB	No	33 КВ	6%	6/26/202
dynamicsax-lasernet81spec.7.0.7279.40.nupkg	NUPKG File	31 KB	No	33 KB	6%	6/26/202
dynamicsax-lasernetautoformdm.7.0.7279.40.nupkg	NUPKG File	31 KB	No	33 KB	6%	6/26/202
dynamicsax-lasernetengine.7.0.7279.40.nupkg	NUPKG File	31 KB	No	33 KB	6%	6/26/202
dynamicsax-lasernetpu35spec.7.0.7279.40.nupkg	NUPKG File	31 KB	No	33 KB	6%	6/26/202/
dynamicsax-lasernettestsuite.7.0.7279.40.nupkg	NUPKG File	32 KB	No	33 KB	6%	6/26/202
dynamicsax-prnbuttons.7.0.7279.40.nupkg	NUPKG File	31 KB	No	33 KB	6%	6/26/202
dynamicsax-prnbuttonslacadaptor.7.0.7279.40.nupkg	NUPKG File	31 KB	No	33 KB	6%	6/26/202

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 Lasemet



# 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.



	Finance and Operations	,P Search for a page		USMF   Contoso Entertainment System USA	⊚ ?	AL
=	Standard view ~ Setup wizard					
11 * ©	Start	Following steps have to be made manually to support designing and printing functionality O Reset				
1	Cilection	No. Action	Link Complete			;
	O Complete	Download and install Lasemet report designer	÷.			
<u>و</u>		2 Load basic settings	⊳			
		3 Download and install Cloud Print Connector	÷			
		4 Download and install Cloud Print Connector configuration	÷			
		5 Fetch local printer names via Cloud Print Connector	⊳			
		6 Assign Lasernet users	⊳			



- 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.
- 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:



etup wizard		
Start	Following steps have to be made manually to support designing and printing functionality	
Checklist	O Reset	
	No. Action	Li Complete
Complete	1 Download and install Lasernet report designer	$\pm$ $\checkmark$
	2 Load basic settings	0 🗸
	3 Download and install Cloud Prin	
	4 Download and install Cloud Priv	overwrite basic settings?
	5 Fetch local printer names via Cl	over write busie settings.
	6 Assign Lasernet users	
		Yes



# **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:

=	58		processing
<b>命</b> Home		Category and product	
☆ Favorites	~	management	Dinvoicing
C Recent	$\sim$		
Workspaces	$\sim$	📅 Channel deployment	Lasernet Essentials
₩= Modules	$\sim$		
		Channel merchandising configuration validator	Na Learning
		Commerce pricing and discount management	$P_{\odot}$ Leave and absence

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
=	-Ę-
	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
	Due du atiene en atuel



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:

Fleet management General ledger	Business processes for human resources	Customer credit and collections	General journal processing
Human resources Inventory management	Business processes for payroll	Customer invoicing	Invoicing
Landed cost Lasernet Leave and absence	Cash overview - all companies	Reg Customer payments	O Lasernet
Master planning Organization administration	Cash overview - current company	🗒 Data management	R Learning
Payroll Print buttons	Catalog management	Data validation checklist	$\mathcal{P}_{\infty}$ Leave and absence





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

	Finance and Operations		USMF   Contoso Entertainment System USA	Q	۲	?	AL
=	← Options				Ö	œ	ď
(Ω) ☆	Lasernet Essentials						
٩	△ Summary						
а 	Load from catalog Open designer Setup wiza	d Settings					
	△ Reports						
	P Filter X  ≡ List  ∎ Del	ete × Deactivate 🖉 Edit × Backup ×					
	PurchPurchaseOrder	SalesPackinoSlioReol.					



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.





#### の Search for a page ? Load from catalog ← Options , ♀ Select/unselect all ណ Reports in File: 4 Lasernet Essentials ☆ PurchPurchas... Summary v70/PurchPurchaseOrd 9/12/2024 11:34:04 am 0Ŧ M ٤<u>ن</u> 0---SalesConfirmRepl... v70/SalesConfirm.Report.zip 9/13/2024 11:09:47 am Reports SalesInvoiceRepla.. v70/SalesInvoice.Report.zip 9/13/2024 04:49:25 pm 1 SalesPackingSlip... v70/SalesPackingSlip.Re 9/12/2024 09:49:24 am Load Cancel

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.

Finance and Operations				
← Options ♀	Load from catalog			
Standard view 🗸	© Refresh	t all		
Lasernet Essentials	Process in File: 8	×		
∧ Summary	Reports in File: 0			_
+ ⊾ased from				
catalog Open designer Setup wizard Settings	And Street Street Street	And a second sec	and the state	
∧ Reports	SalesConfirmRe 10/3/2024 03:31:52 am	SalesInvoiceReplace 10/3/2024 03:31:12 am	SalesPackingSlipRe 10/3/2024 04:15:46 am	SalesQuotati 10/3/2024 03:31:3
P Filter X ■ List  © Delete X Deactivate  P Edit X Backup X	v70/SalesConfirm.Report.zip	v70/SalesInvoice.Report.zip	v70/SalesPackingSlip.Report	v70/SalesQuotation
SalesConfirmReplace				

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.

Setup for Lasement Export V Use Network Printer Reload Options	1 August Turn	
Contose Entertainment System USA 123 Coffee Street: Suite 300 Redmond WA 98052 USA	- + Automatic Zoom  Telephone Fax Giro Tax registration number Purchase order	1234123400 CODY
Fabrikam Electronics Cindy Road&55 Guadajara, JAL, 44190MEX	Page Number Date Prepayment obligation Delivery terms Delivery address Site 1 21 5 South Street, Gate 1 Galvin, WA 98544 USA	1 of 1 00034-1 1/14/2017 No FOB



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.

Finance and Operations Preview		
Cannot activate report as too many reports already active for licens	se type Lasernet Essentials	
$\left( \leftarrow \right  $ Options $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$		
Lasernet Essentials		
Load from catalog	ttings	
∧ Reports		
P Filter X 🖽 Thumbnails 📋 Delet	🗸 🗸 Activate 🖉 Edit 🗡 🛛 Backup 🌱	
Report name	Report design name	Active
SalesConfirmReplacement	Custom query: SalesConfirmHeaderTmp	~
SalesInvoiceReplacement	Custom query: SalesInvoiceHeaderFooterTmp	~
SalesPackingSlipReplacement	Custom query: SalesPackingSlipHeaderTmp	~
PurchPurchaseOrderReplacement	Custom query: PurchPurchaseOrderHeader	
SalesQuotationReplacement	Custom query: SalesQuotationDetailsTmp	



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.

Finance and Operations	Accounts payable	Purchase orders > All purchase orde	rs				
← Options							
000011 : Contoso Asia   S	000011 : Contoso Asia   Standard view 🗸						
Purchase orde	r confirmatio	ins					
Overview Lines							
Preview/Print V Charge	s Sales tax Prepayme	nt Purchase order request					
Copy preview	Purchase j Date	Buyer group Cur	Amount in Order send status	Order request vend			
Original preview	000011-1 1/18/2017	USD	4.00				
Use print management							

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.

Finance and Operations	Accounts payable > Purcha	ase orders > All purchase orders	
Report PurchPurchaseO	rder.Report has been successfully setup	o for Lasernet. Next time you run this report, Lasernet processing and destinations will be available for you	l.
← Setup for Lasernet	Export 🗸 Use Network Printer	Reload Options 🔎	
	1 of 1	— 🕂 Automatic Zoom 🗸	
	Contoso Protess Industry 123 Coffee Street Suite 300 Redmond, WA 98052 USA	Refresh session to apply new report setup and have Lasernet destinations?	
		Number	000008-1
		Date	1/18/2017
		Prepayment obligation	No

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



Finance and Operation	ns							
← Options								
Standard view $\checkmark$								
Purchase or	der confirma	ations						
Overview Lines								
Preview/Print 🗸 🕼	Lasernet ✓ Charges	Sales tax Prei	pavment Purch	ase order request				
<ul> <li>Invoice account</li> </ul>	Purchase order	Purchase j	Date	Buyer group	Cur	Amount in	Order send status	Order request vend.
O US-102	000001	000001-1	9/1/2016	10	USD	4,099,643		
JP-001	000002	000002-1	9/1/2016		USD	624,661.53		
CN-001	000003	000003-1	9/1/2016		USD	728,721.00		
US-102	000004	000004-1	9/16/2016	10	USD	2,397,024		
000011 : Contoso / Purchase (	Asia   Standard vie order conf	<sup>₂</sup> w∨ irmatio	ns					
Overview Lines								
Preview/Print 🗸	🛓 Lasernet 🗠 🖸	harges Sale	s tax Prepay	ment Purchase	order requ	uest		
O Purchase ord	Lasernet Copy prev	iew	Bu	yer group	Cur A	mount in	Order send status	Order reques
0 000011	Lasernet Original p	review /2017	e e e e e e e e e e e e e e e e e e e		USD	4.00		
1	Perend							
	Resenu							
	Resend							

#### 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.



- 😑 🗟 Save	+New	📋 Delete 🛛	Journal Testir	ng 🗸 🤇 Setup	Options 🔎					
Configuration Structure Data sources Add field	Design Designer Versions	Links Form links Alert links Query links	Replacement Replacement	Overlays Attachments Images	<b>Setup</b> Metadata (Autoform D Printer settings	M) Validate Refresh Copy/Rename ∽	Tools Download query definition Generate report summary	Compare ∽ Update design	Query Query wizard Dialog setup Run report	Backup Export report backup Import report backup Copy report to other companie
SalesConfirm	eplacement			a dular sure	×	Standard view ∽ <b>Reports</b>				
SalesConfirmr	Report nar SalesConfi	ne irmReplacemer	Repor	rt design name <u>um query: Sales</u> C	×) I ConfirmHeaderTmp	Standard view ∽ Reports General				

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**.

Finance and Operations Preview	Accounts receivable 📏	Orders > All sales orders
← 🗟 Save 🞍 Download ∽ 🖨	Print 📓 Go to Report 🛛	
<sup>My view ∨</sup> Preview: SalesPackingS	lip_1272_2024C	Add field Query wizard Images 38.PDF
I⊴ First ⊴ Previous File 1 of 1 ▷ ≔   ∀ ∨ ∀ Draw ∨ ⊘   Œ	Next ▷l Last <b> Show</b>	Design Sh - + 🖼   1 ort   🤉   15 Reset
	🗘 For	Resend Per
		Pro forma packing slip
	Ship to:	Number Date 9/3/2024



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).





Standard view Setup wizard			
Start	Following steps have to be made manually to support designing and ORESE	printing function	nality
lype	No. Action	Link	Complete
Checklist	Download and install Lasernet report designer	$\overline{1}$	~
	2 Load basic settings	$\triangleright$	$\checkmark$
O Complete	3 Download and install Cloud Print Connector	$\overline{\uparrow}$	$\checkmark$
	4 Download and install Cloud Print Connector configuration	$\overline{1}$	~
	5 Fetch local printer names via Cloud Print Connector	$\triangleright$	
	6 Assign Lasernet users	$\triangleright$	

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.

Setup wizard		
Start	Following steps have to be made manually to support designing and printing functionality C Reset	
Checklist	No. Action Link	Complete
Complete	1 Download and install Lasernet report designer	~
	2 Load basic settings	~
	3 Download and install Cloud Print Connector	
	4 Download and install Cloud Print Connector configuration $\pm$	
	5 Fetch local printer names via Cloud Print Connector	
	6 Assign Lasernet users D	
	This step contains a link to the Lasernet report designer installation package. Lasernet report designer will allow you to design the report layout. Download the	package and install the s
	Back Next Cancel	

Res	et	
lo.	Action	Li Complete
1	Download and install Lasernet report designer	$\overline{\mathbf{A}}$
2	Load basic settings	⊳
3	Download and install Cloud Print Connector	4
4	Download and install Cloud Print Connector configuration	$\downarrow$
5	Fetch local printer names via Cloud Print Connector	⊳
6	Assign Lasernet users	⊳



#### 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.



Finance and Operations Preview	
← 🖬 Save Options 🔎	
standard view ∽ Lasernet parameters	5
General	License information
License terms	Lasernet License
Catalog	Clear Lasernet cache Clear entire cache
Version	License code

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.

Finance and Operations Preview	
← 🖾 Save Options 🔎	
<sup>Standard</sup> view ∽ Lasernet parameter	s
General	License information
License terms	Lasernet License
Catalog	Clear Lasernet cache Clear entire cache
Version	License code

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.

C Save Options	)
Standard view ∽ Lasernet param	neters
General	Catalog
License terms	This storage connection is used to load settings and report settings from Formpipe catalog. Usually you do not need to change that, unless you get personalized storage connection from Formpipe.
Version	✓ Validate
	*****

#### 5.1.4.4 Version

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

← 🔙 Save Options 🔎		
Standard view ∽ Lasernet parameters		
General	Lasernet FO Connector version	
License terms	Version	
Catalog	Formpipe Lasernet Connector for Dynamics 365 for Finance and Operations Version: 7.0.02409171 Hosting environment: ServiceFabric .Net framework 4.0.30319.42000 OS version: Microsoft Windows NT 6.2.9200.0 Lasernet version: 7.0.02409171 Installed product version : Microsoft Dynamics 365 for Finance and Operations (10.0.40) Platform name: Update64 Product build version: 7.0.7279.122	Related modules: LAC CE 7.0.0.2409171 (usr) LACMSHotfixes 7.0.0.2409171 (isv) Lasernet 7.0.02409171 (isv) Lasernet Autoform DM 7.0.0.2409171 (isv) Lasernet figne 7.0.0.2409171 (isv) Lasernet Figne 7.0.0.2409171 (isv) Lasernet Test Suite 7.0.0.2409171 (isv) PRNButtons Lasernet Adaptor 1.11.1.2409171 (isv)
	Modules	
	Copyright	
	Copyright © 2012-2024 Formpipe Software	



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.

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## 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.



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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.

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0	Report name	Report design name	Active
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	SalesInvoiceReplacement	Custom query: SalesInvoiceHeaderFooterTmp	~
	SalesPackingSlipReplace	Custom guery: SalesPackingSlipHeaderTmp	~

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.



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#### 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.



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1. Choose the desired table.

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CustTable	Customers	
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2. Choose the desired field.



Add field to report				
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CustTable.		$\sim$		
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balanceAllCurrency()	Amount in transaction cur			
balanceCurPerDate()	Amount in transaction cur			
balanceCurrency()	Amount in transaction cur			
balanceMST()	Amount			
	Amount			

#### 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.

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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.

Finance and Operations	⊅ Search for a page	USMF   Contoso Entertainment System U
<sup>Standard</sup> view ∨ Report Wizard: SalesIn	voiceReplacement	
Wizard for creation of a report     Tables     Select fields	Primarily, solect in the list of all tables and then, if required, in the list of related tables.  All tables  Filter  Add related tables  Table name  Description  AbbreviationsStaging  Abbridgements of addresses	Selected tables
O Sort fields	Accountant_BR Accountants AccountantElectronicAddressVie Accountant electronic address	A Query     SalesinvoiceHeaderfooterTmp
O Range	AccountantLogisticsLocation_BR Accountant location relationships	CustInvoiceJour
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	Back Next Finish Cancel	

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



Selected tables
¤\$ Relation/Layout ↑ Up ↓ Down 🗈 Copy/Move ∽ 🗚 Labels
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Query
<ul> <li>SalesInvoiceHeaderFooterTmp</li> </ul>
CustInvoiceJour
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0	С	Text ID	Text	Data source	Field name
$\bigcirc$		@SYS9694 ~	Sales order	SalesInvoiceHeaderFo $$	SalesId
		@SYS23422	Customer requisition	SalesInvoiceHeaderFooter	PurchaseOrder
		@SYS23010	Customer reference	SalesInvoiceHeaderFooter	CustomerRef
		@SYS320666	Worker name	SalesInvoiceHeaderFooter	SalesAdministrator
		@SYS828	Payment	SalesInvoiceHeaderFooter	PaymentCondition
		@SYS25708	Invoice account	SalesInvoiceHeaderFooter	InvoiceAccount
		@SYS7402	Date	SalesInvoiceHeaderFooter	InvoiceDate
		@SYS9362	Address	SalesInvoiceHeaderFooter	InvoicingAddress
		@SYS58518	Invoicing name	SalesInvoiceHeaderFooter	InvoicingName
		@SYS3676	Record ID	SalesInvoiceHeaderFooter	Recld
		@SYS116965	String 60	SalesInvoiceHeaderFooter	InvoiceTxt

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



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(	С	С	Text ID	Text	Data source	Field name
C	С		@SYS9694 ~	Sales order	SalesInvoiceHeaderFo $$	SalesId
			@SYS2 @SYS9694	Customer requisition	SalesInvoiceHeaderFooter	PurchaseOrder
			@SYS23010	Customer reference	SalesInvoiceHeaderFooter	CustomerRef
			@SYS320666	Worker name	SalesInvoiceHeaderFooter	SalesAdministrator

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

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C	C	Text ID		Text	Data source	Field name	
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C	)	@SYS9694		Sales order	SalesInvoiceHeaderFooter	SalesId	
		@SYS23422		Customer requisition	SalesInvoiceHeaderFooter	PurchaseOrder	
		@SYS23010		Customer reference	SalesInvoiceHeaderFooter	CustomerRef	

#### 2. Select Fields

Wizard for creation of a report	Choose fields to show in your report. You will be a Available fields	ble to add fields in Elements form, but we suggest to add as much as possible he Selected fields
Tables	P Filter	↑ Up ↓ Down
Select fields Sort fields Range Create report	<ul> <li>SalesInvoiceHeaderFooterTmp</li> <li>CustInvoiceJour</li> <li>SalesTable</li> <li>CompanyInfo</li> <li>Accountant_LT</li> <li>AccountingPersonneLJP</li> <li>AccountOfficeRefNum</li> <li>ActivityCode</li> <li>AddrFormat</li> <li>aosValidateDelete()</li> <li>aosValidateOelete()</li> <li>aosValidateUpdate()</li> <li>Bank</li> <li>BankAcctUsedFor1099</li> <li>BankCentralBankPurposeCode</li> <li>BankCentralBankPurposeText</li> <li>BranchId</li> <li>BusinessActivityOesc_SA</li> <li>BusinessCommencedDate_JP</li> <li>BusinessInitialCapitaLJP</li> <li>BusinessInter_JP</li> <li>BusinessNumber_CA</li> <li>CertifiedTavAccountant_ID</li> </ul>	



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

Available fields		Selected fields	
₽ Filter	]	<b>↑Up</b> ↓ Down	
SalesConfirmHeaderTmp	2	P Filter	
▲ SalesConfirmHeaderTmp		<ul> <li>SalesConfirmHeaderTn</li> </ul>	q
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CashDiscEuro	(~)	CompanyAddress	
CashDiscOnInvoice	(+B)	Recld	
CashDiscPercent		CashDiscEuro	
CashDiscTxt		CashDiscPercent	
CompanyAddress		CompanyCommercial	RegisterSection
CompanyBankAccountName		PurchaseOrder	
CompanyBankAccountNum		<ul> <li>CustConfirmJour</li> </ul>	
CompanyBankAccountRegNum		n	
CompanyCommercialRegister	1	PROPERTIES	
CompanyCommercialRegisterInsetNumber		C Property	Value
CompanyCommercialRegisterSection		Label	Customer requisition
CompanyCoRegNum			

#### 3. Sort Fields

Wizard for creation of a report	Choose default sort order. You will be able to change sort order in report dialog.
	Available fields Sort by
[ables	↑ Up ↓ Down
Select fields	
	<ul> <li>SalesInvoiceHeaderFooterTmp</li> <li>SalesInvoiceHeaderFooterTmp</li> </ul>
Sort fields	✓ CustInvoiceJour
	▲ SalesTable ← SalesTable
Range	▲ CompanyInfo
	🖌 CompanyImage 🛁 🖌 CompanyImage
Create report	<ul> <li>SalesInvoiceLocalizationTmp</li> <li>SalesInvoiceLocalizationTmp</li> </ul>
	ItemId — 🖌 SalesInvoicePaymentStubTmp
	<ul> <li>SalesInvoicePaymentStubTmp</li> <li>SalesInvoiceTmp</li> </ul>
	<ul> <li>SalesInvoiceTmp</li> <li>ItemId</li> </ul>
	ItemId_W Ascending (A-Z)
	SysDocuBrandDetailsRegular     Descending (Z-A)
	<ul> <li>SysDocuBrandDetailsRegular</li> </ul>



#### 4. Range

Report Wizard: SalesInvo	oiceReplacement					
<ul> <li>Wizard for creation of a report</li> <li>Tables</li> </ul>	Choose default field ranges. You will be able to add any other range in report dialog. Available fields Default ranges P Filter					
<ul> <li>Select fields</li> <li>Sort fields</li> </ul>	▲ SalesInvoiceHeaderFooterTmp     BankSpecificSymbol     BuyerAddress     ▲ SalesInvoiceHeaderFooterTmp     ▲ SalesInvoiceJour     ▲ SalesTable					
Range	BuyerEnterpriseCode BuyerName BuyerRegNum_W	CompanyLogo)				
<ul> <li>Create report</li> </ul>	CompanyAddress CompanyBankAccount CompanyBankName CompanyBranch_TH CompanyCommercialRegister CompanyCommercialRegisterInsetNumber		SalesInvoiceUcaizationInip     SalesInvoicePaymentStubTmp     SalesInvoiceTmp     SysDocuBrandDetailsRegular		_	
	CompanyCommercialRegisterSection		0	Property	Value	
	CompanyCoRegNum		-	Visible	No	
	CompanyCurrencyBankAccount			Read-only	Yes	
	CompanyCurrencyBankName			Filter	Ves	
	CompanyCurrencyCode			Value	CompanyLogo	
	CompanyEmail CompanyEnterpriseCode CompanyEnterpriseNumber CompanyGiro CompanyIdNAF CompanyInitialCapitaL_FR CompanyIegalFormFR		Filte	r/range value to selec	t statement	
	Back Next Finish Cancel					



#### 5. Create Report

Report Wizard: SalesInvoiceReplacement							
Wizard for creation of a report	Wizard complete						
S Tables	This is all the wizard needs to create the report.						
Select fields	Click Finish to create and save the report.						
Sort fields	Click Cancel to cancel without saving any of the selections made.						
Range							
Create report							
	Back Finish Cancel						



#### 5.2.4.3 Images

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

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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.

	Finance and Operations	$\mathcal P$ Search for a page			
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	X Included in report	Storage Database			
		Preview			
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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).

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4. Open your Lasernet Form Editor and add the image to your design.



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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.

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

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		Preview
	+ 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.

	Finance and Operations	
=	$\leftarrow = \mathscr{P}$ Edit +New 🛍 Delete 🛓 Download	× Exclude from report Options 🖉
ഫ ☆	(P Filter	SalesInvoiceReplacement   Standard view 🗸
<b>(</b>	Show only included in report	Images
DF.	• Formpipe_logo.png	Formpipe_logo.png
8:=		Processed file storage
	X Included in report	Storage Database
	17	Preview
	+ Add	

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**.



← Sale	← ➡ Bave + New Delete Options $>$ SalesInvoiceReplacement   Standard view >						
At	ta	cł	nments				
Sales	Inv	oice	Replacement				
Re	рог	rt at	tachments				
+	Ne	ew	🗓 Delete ↑ Up ↓	Down			
(	D	C	Attachment referen	Restriction	Туре	Document type	
•			SalesTable 🗸 🗸 🗸	External $\checkmark$	File $\vee$	All types $\checkmark$	
						All types	
						Original	
	Сору						
	Pro forma						
						Pro forma copy	

#### 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.

#### Туре

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 Pro 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.

	POpen View history
P Filter	Standard view ~ Attachments for Sales orders - Sales order: 000811, Cave Wholesales
Elle	Description Type Attached
Sales orders	User License Counts Finan File Ves
	General
	DETAILS CREATE
	Notes Created by
	Admin
	Created date and time
	6/10/2024 07:26:30 PM
	Restriction
	External
	Attachment
	FILE INFORMATION File type FILE LOCATION
	File name ndf File location
	User License Counts Finan
	Ungina me ame
	Oser biterse Counts rinan
	Preview
	± 6 :
	Plance and Operations User Court Report Not 10
	Market water 1783
	Num Market Line Annu Market Line Annu Li
	Long The Second Se
	whitehan the second sec
	Type International Internation
	NOT UNDER
	20 Note 201 U 10
	and the American Spectra
	Landar

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



Finance and Operations Preview	Accounts receivable > Orders > All sales orders	USP2 ,O
i File uploaded as '2011-ENG-Sales-And-De	elivery-Formpipe.pdf	
← ➡ Save +New ✓ ■ Dele	ete Popen View history Tcreated by Settings Preferences	Lasernet V Options P ate attachment configuration for the report
2011-ENG-Sales-And-Deliver File Sales orders	Description Type Attached 2011-ENG-Sales-And-Deliver File Yes	
	General Attachment	
	Preview	
	Control Terms and Conditions of Sale and Diritory may be a set of	

## Standard view $\smallsetminus$

## Create attachment configuration for the report

Automatically create configuration which add attachment(s) for the Lasernet report

Attachment	
Report	
	~)

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:

Finance and Operations	Accounts	receivable >	Orders >	All sales orders
(i 'SalesTable' attachment con	figured for the i	report SalesInv	oiceReplacem	ent
← <mark>=</mark> ⊘Edit +New	间 Delete	Options 3	C	
All types : SalesInvoiceRep Attachments SalesInvoiceReplacement	lacement   St	andard view `	~	
Report attachments				
+ New 볩 Delete 🗅 U	Jp 🔸 Down			
Attachment referen.	Restriction	Туре	Document	t type
SalesTable	External	File	All types	

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.

Create attachment configuration for the report
There was no report found containing source 'PurchTable' that does not have attachement configured. You can manually add this source to report related sources.
Attachment
Report
Report name :
We didn't find anything to show here.

#### 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.

Lasernet E	ssentials			
∧ Summary				
Load from		Îŧ	ŝ	
catalog	Open designer	Setup wizard	Settings	
SalesInvoice	Replacement	≣List 볩 Delete	✓ Deactivate Ø Edit ✓ Edit Add field	ackup 🗸
C Formpipe.	Ner Ner Ner Ner Ner Ner Ner Ner		Query wizard Images Attachments	
Martin Sama Martin Sama Marti	10 100 000 10 10 200 10 10 10 100 10 10 100		Destinations	]
			Resend	
SalesInvoiceF	Replacem			



Destinations can be	e defined for	Printer, E	mail, and S	Screen.
---------------------	---------------	------------	-------------	---------

← 📑 🗟 Sav	re +New 🗊 Delete	↑Up ↓D	own Copy Options 🔎				⊗ <b>0</b> ₽
P Filter			SalesInvoiceReplacement   Standard	l view 🗸			
C Active	Description	De 1	Destinations				
	Local office printer	Printer	SalesInvoiceReplacement				
			General				
			Active Ves	Description Local office printer	Destination type Printer	Suppress warnings	Priority 0
					Default		Find next
					Printer		No
			References		Email Screen		
			Reference type	Account code	Account selection		
			Customer	All			
			Printer parameters				
			Printer name	Printer type	Identifier	Printer profile	Printer driver
			EPSON2AA449 (ET-4850 Se V	Lasernet Cloud Print Conne V	65b049c1-c989-4b77-87de V	V	Epson ESC/P-R V4 Class Driver

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.

Standard view ~ Print destination settings	
Lasernet Predefined	Fallback destination
Lasernet Email	None
Lasernet Print	Print es
Lasernet Screen	Email Screen
	0 0

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

Print destination settings	
Lasernet Predefined	
Lasernet Email	
Lasernet Print	
Lasernet Screen	
Print archive	
Screen	
Printer	
File	
Email	

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

L	asernet Es	sentials					
<u>^</u>	Summary						
	+		ÎĤ	٤ <sup>ŷ</sup>			
	Load from						
	catalog	Open designer	Setup wizard	Settings			
^	Reports						
					× ≡ List 🗊 Dele	te × Deactivate	
							Add field
	O formpipe.	unation of					Query wizard
	10000 00000 10000 0000 10000 0000 10000 000	Sector Sector					Images
	The second secon	1-11					Attachments
							Destinations
							Reset
							Resend
	SalesPackingSlip	Repl					

#### 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.

← Options	Q					
Lasernet E	ssentials					
Summary						
+		ÎĤ	ស៊ែរ			
Load from						
catalog	Open designer	Setup wizard	Settings			
	g			× ≡List 🗑	Delete × Deactivat	e 🖉 Edit 🗸 Backup 🗸
O formpps.	n barne pasting site					Import
garde (	(m. m					

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		USMF   C
Certions D		Standard view ~ Export
Lasernet Essentia	Igner Setup wizard Settings	Reports in System: 3/4 Report name  PurchPurchaseOrderReplacement SalesConfirmReplacement SalesInvoiceReplacement SalesQuotationReplacement
O Filter	■ List	
×	✓ O foreppe. ✓ <sup>DEn</sup>	
international and the second s		
	<u> </u>	
PurchPurchaseOrderR	SalesConfirmReplace SalesInvoiceReplacem SalesQuotationReplac	
		Export Cancel



	its in System. 175		
0	Report name	T	:
	SalesConfirmReplacement		
	SalesInvoiceReplacement		
0	SalesPackingSlipReplacement		

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.





💽 Backup_usmf_Admin_06-13-2024_19-32-5.xml	Microsoft Edge HTML Do	137 KB	No	1,306 KB	<del>3</del> 0%	6/13/2024 7:32 PM	
Name	Type	Compressed size	Password	Size	Ratio	Date modified	
The name of an export file containin name, Company, User, and Curre	ng a single report Int Date & Time,	includes the such as:	Report				
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.

Finance and Operations		
$\leftarrow$ Options $\sim$		
Standard view ∽ Lasernet Essent	ials	
∧ Summary		
+	ÎĤ	ĘŎ
catalog Open	designer Setup wizard	Settings
∧ Reports		
P Filter	× I≣ List 🗎 Delete	× Deactivate 🖉 Edit ∽ Backup ∽
O Formpipe.	Formpipe.	✓ Export
Galaxies Version Regist (rs. https://www.inter- tion.com/section/sec	Bit and the second state         Image: Second state<	
Nonpole         No do         No do         No         No         No         No           MM         State         NO	All         Security         Description         Description <thdescription< th=""> <thdescription< th=""> <thdescrip< td=""><td>NUM 8 9</td></thdescrip<></thdescription<></thdescription<>	NUM 8 9
The state of the s		_
SalesConfirmReplace.	SalesPackingSlipRep	la



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.

Import
-04-2024_16-40-59.zip Browse
Reports in File: 1/1
○ Report name  ↑ :
SalesPackingSlipReplacement
Import Cancel

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.





Summary				
+	X	Îŧ	£ <sup>3</sup>	
Load from catalog	Designer Disabled	Setup wizard	Settings	
leports				
P Filter	×	) ≔ List 🛍 Delete 🗸	Activate 🖉 Edit 🗡 Backup	~
1000	~ [	O Formpipe.	Notes No	× · · · · · · · · · · · · · · · · · · ·
En este anno 1997 est	E	Total         Total         Total           1000         1000         1000         1000           1000         1000         1000         1000         1000           1000         1000         1000         1000         1000         1000           1000         1000         1000         1000         1000         1000         1000           1000	And a second sec	EVEN-
	974		The second secon	ans         bit of
				Here and the second sec
			The second secon	

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

Filter	× ≡ List ₪ De	elete × Deactivate	Ø Edit ♥ Backup	~	
~	O Formpipe.	×	Ĭ		~
ter drome ter drome	No. Source and Pageline Control of Source Contro	ana ang pangana ang pa pangana ang pangana ang pang	The second secon	Next. Next.	in the second
	Table Sector System Loss		100.0 Nov Nov Nov Naciona Statuto I November Naciona Statuto I November Naciona Naciona Statuto I November Naciona Naciona Statuto I November Naciona	ET 0 20 <sup>10</sup>	
				The second secon	

### 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:

Finance and Operations Preview	Accounts receivable > Orders > All sales orders				
① SalesConfirmReplacement Style sheet is updated					
A For report changes to take affect, report data needs to be regenerated (resended). Automatic resend for this report is not possible, please re-run report manually, to get all new modifications to report.					
← 🗟 Save 🞍 Download ∽ 🖨 Print 📓 Go to Report 🖉 Edit ∽   <b>Options</b> 🔎					
Standard view 🗸					
Preview: SalesConfirm_1380_20240829_080557.PDF					
I⊴ First ⊴ Previous File 1 of 1 ▷ Next ▷ Last ∲ Show XML 🕐 Refresh					
≔   ∀ × ∀ Draw × ⊘   Œ	)   A <sup>b</sup> - + 🖂   1 ors   🤉   13				
	Q Formpipe.				
	Pro forma confirmation				
	Pro forma confirmation				

#### 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.







# 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.

Finance and O	perations	Accou	unts receiv	able 〉 Or	rders 〉 All s	sales orders			
$\leftarrow  +_{New}$	🗓 Delete	Sales ord	er Sell	Manage	Pick and p	ack Invoice	Commerce	General	Wareho
Credit note	Charg	jes	Тах			Calcul	ate		
Credit note	Maintain o Allocate c	charges harges	Sales tax	Confirme Multiline Total dise	ed delivery da discount count	tes Suppleme Header au	ntary items to charges	Tiered charge Push price and	s d totals
All sales order	s								
My viev	٧v								
P Filter									
O Sales ord	ler î	Customer	account	Customer	r name	Order t	уре	Inv	oice acco
Ø 000074		US-032	1	Duroo Sa		Sales o	order	US	-032
000075		US-027	Form in	formation		Sales o	order	US	-027
000076		US-032	Persona	alize: Custom	ner account	Sales o	order	US	-032
000077		US-032	Export	Export all rows		Sales order		US	-032
000078		US-032	Export	marked rows	5	Sales o	order	US	-032
000079		US-032	Insert o	olumns		Sales o	order	US	-032
000080		US-002	Group I	by this colun	nn r	ngeles Sales o	order	US	-002



Personalize
Label
Customer account
Width
<ul> <li>Hide</li> <li>Required</li> <li>Skip</li> </ul>
←■ Move left Move right ■→
Add to report
Personalize this page

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.

Add field to report	
There are some reports found tha section to place your value	t contain data source 'SalesTable'. Please choose report and
Report	
SalesConfirmReplacement	$\sim$
Field	
Expression	
SalesTable.CustAccount	~ X)

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:

	Finance and Operat	tions		a page			USMF   Contoso Entertainment Syste	em USA	Q	۲	?	AL
=	- Totals Vouc	her Transactions Cha	rges Posted sales tax	Invoice Options 🔎			8	0	<b>ှာ</b> ပ	) 💬	ы	Y
ŵ												
	Accounting	Ship	Details	Intercompany	Document	Properties						
☆	View distributions	Shipping specifications	Commission transactions	Synchronize batch/serial numbers	View V	Electronic document properties						
	View accounting	Bill of lading		Generate intercompany invoice	Lasernet 🗸							
©		View historical load data			Lasernet Copy	/ preview						
					Lasernet Origi	inal preview					~	
					Resend							
8:=	Invoice journal   0	00500 : Contoso Retail Sea	attle		1							
	Standard view ~											
	P Filter											

- 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.

Standard view $\checkmark$ Print destination	settings
Lasernet Predefi	
Lasernet Email	
Lasernet Print	
Lasernet Screen	

## 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.



	Finance and Operations	s مر	earch for a page					USMF   C	ontoso Entertainment Sy	item USA	Q	۲	?	AL
=	← 🗟 Save 🚽 Download ∽ 🖨 Print	🗟 Go to Repo	rt 🖉 Edit 🗸 Option	s ,0					~	0	<b>ှ</b> ပ	œ	в	$\mathbb{Y}$
â	Standard view $\sim$													
*	Preview: SalesInvoice_5129	_2024091	6_090148.PDF										J	
Ð	⊲ First ⊲ Previous File 1 of 1 ▷ Next	⊳l Last 🛷 Sh	ow XML 🕐 Refresh											
Ø	≡ display			1 / 1	- 100% +	E Ø					± (			
		Bill to: Contoso Ret 123 Silver R Seattle, WA USA	al Seattle ad 99104	Ship to: Contoso Reta 123 Silver Roi Seattle, WA 9 USA	ail Seattle ad B104	Invoice Page Number Invoise date Invoise account Your ref. Saise order Pagment Remutition	1 / 1 CIV-000499 6/15/2016 US-005 000500 Net 10 days							
		ltem number	Description		Quantity L	init Unit pric	e Discount	Amount						
		D0001	Mid-Range Speaker		4.00 e	a 480.0	0	1,920.00						
		L0001	Mid-Range Speaker 2		5.00 e	a 500.0	0	2,500.00						
		P0001	Acoustic Foam panel		21.00 e	a 37.0	0	777.00						



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	D Search for a page
=	← Bave Options P	
60 ☆	Standard view ∽ Lasernet parameters	
C	General	Set up Lasernet FO Connector parameters
8	License terms	Disable report preview edit features
	Catalog	Disable report preview edit featu
	Version	No 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:

		Form - Laser	net Form	Editor 11			- 0	×
<u>File Edit Form</u>	<u>S</u> heet <u>T</u> e	ools <u>V</u> iew <u>H</u> elp						
E Save	Preview	🛠 Cut 📋 Copy 📄 Paste 🖒 Undo 🔿 Redo 🖌	A Styles	🔹 🔏 Form	at Painter 📗 Guides	Output zoom: 100%	•	
Font: 📓 Arial		▼ Size: 10 ▼ X: 0.0 mm ♀ Y: 0.0 mm ♀	B I	UA≣			8	
	1	<report xmlns=""</report 	▲ 0	10 20	30 40 50 60	70 80 90 100	110 120	130 4
<b>&gt;</b>	3	LACID="{89165701-FA93-4262-B64F-D6455F45AE72}						
Select	4	LACTimeSeparator=":"						
	5	LACTimeFormat="h:mm tt"	10					
S	6	LACDate4="d MMMM yyyy"						
Criterion	7	LACDate3-"d MMM yyyy"						
Citterion	8	LACDate2="MM/dd/yyyy"	20					
L.	9	LACDate1="M/d/yyyy"						
	10	LACDateSeparator="/"	0					
Rearrange	11	LACDateFormat="M/d/yyyy"	m -					
F100	12	LACDateTimeFormat="M/d/yyyy h:mm ##"						
	13	LACDecFormat="ddc"	40					Invo
Calculation	14	LACGroupSeparator=","						. Languages and
calculation	15	LACDecSeparator="."						Page
	16	LACNumberFormat="###,##0.;-###,##0."	2					Numt
	17	LACReportCultureId="en-US"						Invoic
Subform	18	laccDATA2=";"	0	Bill to:		Ship to:		Invoic
	19	IaccDATA=";"	<b>1</b>	Oak Compar	iy .	Oak Company		Your
	20	Name="Salesinvoicekepiacement">		456 Green R	oad Fairfield	456 Green Road Fair	field	Ourn
Barcode	21	V (Jobinio)	70	Bluefield, W/	A 24701	Bluefield, WA 24701		Sales
	22	<pre>Keport&gt;SalesinvoiceReplacement</pre>		USA		USA		Pavm
	23	(UserId) admin						Regu
· · ·	24	Company Contors Onango Tuico	00 -					
Charts	26	Company/Concoso orange ource						
	27	(Partition) Initial Partition	0-					
<u> </u>	28	(PartitionId)initial	0,					
Image	29	<language>en-us</language>	_					
_	30	Report Language >en-us	100					_
	31	<report datenumberlanguage="">en-us</report>						
T	32	<pre>{ExecutionId&gt;BE4DC15B-5243-4E83-B628-2782905</pre>	0	Item number				
lext	33	<environment></environment>	11	[scrint]	Description		Quantity Ur	nit
	34	<predefineddestination></predefineddestination>		[cobt]	a contraction		and hity of	
	35	<proforma></proforma>	20	D0001	Mid-Range Speaker		4.00 ea	1
Shape	36	<preview>No</preview>	* "	[script]				•
	4	•	4					*
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×			-		and ruge	a single rage		
						Auto Alier	mant Auto C	Ileas

A comprehensive <u>guide</u> 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**.

Finance and Operations	D Search	for a page	
🤶 🖾 Save Usage data Persona	alization Options $P$		
<sup>My view</sup> ∽ User options			
Visual	Set up account information		
Preferences	Account		
Account	User ID Name Alias Admin Admin Soren.hjorth@	Network domain Telemetry ID formpipe.com https://sts.windows.net/ (4CA76768-	9054-415C-BD4A
	Email provider selection		
	Email provider ID Sender email SMTP		
	Electronic signature		
	Signature enabled		
	valid ceruncate		
	Designate approver Get certificate Reset certificate		

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



	✓ Workspaces	All workflow configurations	Batch group	Database log setup	Due date alerts
pense management	System administration	$^{\vee}$ Inquiries	Active periods for batch jobs	∨ Data cache	✓ Email processing
eet management	El Data management	Deleted attachments	Batch class configuration overrides	Data cache parameters	Email distributor batch
eneral ledner	eg bete nonsgement	Document history	System job parameters	Tile data cache configuration	Email attachments
uman resources	III Feature management	✓ Database	Entity Store	Data set cache configuration	Email broadcast
ventory management	III Optimization advisor	Database information	PowerBl.com configuration	KPI cache configuration	Batch email sending status
anded cost	∽ Users	Database Log	Deploy Power BI files	KPI detail data cache configuration	Retry schedule
eave and absence	Users	SQL index fragmentation details	Configure performance tool	∽ Email	Maintain diagnostics validation rule
arter planning	Online users	Batch jobs	System parameters	Email parameters	Schedule diagnostics validation rule
rganization	User groups	∽ Data cache	Client performance options	System email templates	Run performance test
dministration	Invalid users	Tile data cache	Office and parameters	Email client constraints	Batch job clean-up
ayroll	User requests	Data set cache	Configure cross-company data sharing	Email history	Sealed bid Key Vault cleanup
rint buttons	✓ Security	KPI detail data cache	Microsoft Entra ID applications	> Row version change tracking	Workload history data cleanup
rocurement and	Assign users to roles	User log	Key Vault parameters	> Export data to Azure data lake	> Message processor
ourcing	Security configuration	~ License	Certificate profiles	Initialize process automations	
anagement	Security diagnostics for task recordings	User License Counts	Throttling priority mapping	Process automations	
roduction control	External roles	User License Counts History	B2B Invitation Configuration	Operational Insights	
roject management and	Dormant user security accounts	> Virtual Entity	Custom fields	✓ Periodic tasks	
ccounting	✓ Segregation of duties	Person search report	Alert rules	Notification clean up	
Questionnaire	Segregation of duties rules	V Sanurity	High-volume notification rules	Batch job history clean-up.	
lebate management	Segregation of duties conflicts	Secondy	Refresh elements	Batch job history clean-up (custom).	
letail and Commerce	Segregation of duties unresolved conflicts	Security role assignments	Integration configuration	Batch job ready to post	
ales and marketing	Verify compliance of user-role	Role to user assignments	Demand planning app parameters	Data maintenance	
ervice management	assignments	Security duty assignments	Houlizes from Laserner	$^{\vee}$ Database	
ystem administration	✓ Workflow	✓ License reports	✓ business events	Consistency check	
ax	Workflow parameters	User license estimator	Business events catalog	Database log cleanup	
ime and attendance	Workflow infrastructure configuration	Setun	business events parameters	Custom scripts	
ansportation nanagement	User workflows	License configuration	✓ Database log	~ Alerts	
/endor collaboration	User workflow parameters	civerse configuration	Database log parameters	Change based alerts	

 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.



onfiguration	Configuration			
MTP settings	General			
icrosoft Graph settings	Batch email provider	Attachment size lin	iit (MB) Email expiration in days	
est email	SMTP V	10	0	
	Enabled interactive emai	l providers		
	AVAILABLE		ENABLED	
	Email provider ID	Email provider description	Email provider ID Email provider descr	iption
	EML	Use an email app, such	→ SMTP Use the email clien	t for
	Exchange	Use Exchange email ser		
	Chapit	Ose microsoft draph		
			,	
	Email history			
	View empil history			
	view email history			
	Number of days to retain e	mail h		
	Number of days to retain e	mail h		
	Number of days to retain e	mail h		
	Number of days to retain e	mail h		
	Number of days to retain e	mail h		

 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.



nance and Operations			$\mathcal{P}$ Search for a page
← 🖾 Save Options 🔎			
<sup>My view ∽</sup> Email parameters			
Configuration	SMTP settings		
SMTP settings Microsoft Graph settings Test email	Test connection         SERVER INFORMATION         Outgoing mail server         smtp.office365.com         SMTP port number         587         SSL/TLS required         Yes	AUTHENTICATION Authentication required Yes User name demo.lasernet@formpipe.com Password 	ADDITIONAL RESOURCES View email history Batch email sending status Email distributor batch

 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.

Finance and Operations			$\mathcal P$ Search for a page		
-t	Expand all 🖸 Collapse				
Evnenre management	V Workspaces	All workflow configurations	Batch group	Database log setup	Due date alerts
Fived accets	System administration	$\sim$ Inquiries	Active periods for batch jobs	$^{ m \sim}$ Data cache	✓ Email processing
Fleet management	E Data management	Deleted attachments	Batch class configuration overrides	Data cache parameters	Email distributor batch
General ledger		Document history	System job parameters	Tile data cache configuration	Email attachments
Human racourcas	Feature management	✓ Database	Entity Store	Data set cache configuration	Email broadcast
inventory management	I Optimization advisor	Database information	PowerBl.com configuration	KPI cache configuration	Batch email sending status
and ad a set	∨ Users	Database Log	Deploy Power BI files	KPI detail data cache configuration	Retry schedule
anded cost	Users	SQL index fragmentation details	Configure performance tool	∽ Email	Maintain diagnostics validation rule
Leave and absence	Online users	Batch jobs	System parameters	Email parameters	Schedule diagnostics validation rule
Master planning	User groups	✓ Data cacha	Client performance options	System email templates	Run performance test
Organization administration	Invalid users	Data cache	Personalization	Email client constraints	Batch job clean-up
Payroll	User requests	Tile data cache	Office app parameters	Email history	Sealed bid Key Vault cleanup
Print buttons	✓ Security	Data set cache	Configure cross-company data sharing	> Row version change tracking	Workload history data cleanup
Procurement and	Assign users to roles	KPI detail data cache	Microsoft Entra ID applications	. Non reason energy recently	> Message processor
sourcing	Security configuration	Userlog	Key Vault parameters	> Export data to Azure data lake	
Product information	Security diagnostics for task recordings	✓ License	Certificate profiles	Initialize process automations	
management	External roles	User License Counts	I hrottling priority mapping	Process automations	
Production control	Dormant user security accounts	User License Counts History	B2B Invitation Configuration	Operational Insights	
Project management and	Segregation of duties	> Virtual Entity	Custom fields	$\simeq$ Periodic tasks	
Questionenie	Comparison of during the	Person search report	Alert rules	Notification clean up	
Questionnaire	Segregation of duties rules	✓ Security	High-volume notification rules	Batch job history clean-up.	
Rebate management	Segregation of duties connicts	User role assignments	Interaction configuration	Batch job history clean-up (custom).	
Retail and Commerce	conflicts	Security role access	Demand planning and parameters	Batch job ready to post	
sales and marketing	Verify compliance of user-role	Role to user assignments	Hotfives from Lasernet	Data maintenance	
Service management	assignments	Security duty assignments	V Duringer supptr	∽ Database	
ystem administration	✓ Workflow	✓ License reports	- business events	Consistency check	
ax	Workflow parameters	Licer licence estimator	Business events catalog	Database log cleanup	
lime and attendance	Workflow infrastructure configuration	V Setup	Business events parameters	Custom scripts	
Transportation management	User workflows	- seup	✓ Database log	✓ Alerts	
Vendor collaboration	User workflow parameters	License configuration	Database log parameters	Change based alerts	
		Server configuration		change based arens	

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



Email distributor batch		
Run in the background		$\frown$
Recurrence Alerts		
Batch processing	Task description	
Yes	Email distributor batch	
	Batch group Private No Critical Job	
	C No	
	Monitoring category	
	Undefined 🗸	
Start date: 7/27/2024 (05:04:34 pm	) (GMT) Coordinated Universal Time	

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**.



	?
Standard view $\checkmark$	
Define recurrence	
Start date Start time 7/27/2024 (D5:14:47 PM) Time zone (GMT) Coordinated Universal Time NO END DATE END AFTER: 1 C END BY:	
7/27/2024	
RECURRENCE PATTERN	
Minutes     Repeat after specified number of minutes       Hours     Count       Days     1       Weeks     Months	
V Years	
OK Cancel	

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

Batch email sending status Standard view ~	)					
O Email description	User ID	Sender email	Email recipients	Created date and time	Latest status change date ti	Status
0	Admin	demo.lasernet@formpipe	soren.hjorth@formpipe.c	7/27/2024 5:05:59 PM	7/27/2024 5:05:59 PM	Waiting (0)
	Admin	demo.lasernet@formpipe	soren.hjorth@formpipe.c	7/27/2024 4:55:09 PM	7/27/2024 4:57:17 PM	Sent
	Admin	demo.lasernet@formpipe	soren.hjorth@formpipe.c	7/27/2024 4:42:21 PM	7/27/2024 4:47:20 PM	Sent
	Admin	demo.lasernet@formpipe	soren.hjorth@formpipe.c	7/27/2024 4:39:38 PM	7/27/2024 4:47:20 PM	Sent
	Admin	demo.lasernet@formpipe	soren.hjorth@formpipe.c	7/27/2024 4:37:18 PM	7/27/2024 4:47:19 PM	Sent
	nathan.gould	demo.lasernet@formpipe	nathan.gould@formpipe	7/26/2024 1:11:50 PM	7/27/2024 4:47:19 PM	Sent
	nathan.gould	demo.lasernet@formpipe	nathan.gould@formpipe	7/26/2024 1:08:35 PM	7/27/2024 4:47:18 PM	Sent

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



Batch email sending status Standard view ~ P Filter	)					
O Email description	User ID	Sender email	Email recipients	Created date and time	Latest status change date ti	Status
0	Admin	demo.lasernet@formpipe	soren.hjorth@formpipe.c	7/27/2024 5:05:59 PM	7/27/2024 5:08:40 PM	Sent
	Admin	demo.lasernet@formpipe	soren.hjorth@formpipe.c	7/27/2024 4:55:09 PM	7/27/2024 4:57:17 PM	Sent
	Admin	demo.lasernet@formpipe	soren.hjorth@formpipe.c	7/27/2024 4:42:21 PM	7/27/2024 4:47:20 PM	Sent
	Admin	demo.lasernet@formpipe	soren.hjorth@formpipe.c	7/27/2024 4:39:38 PM	7/27/2024 4:47:20 PM	Sent
	Admin	demo.lasernet@formpipe	soren.hjorth@formpipe.c	7/27/2024 4:37:18 PM	7/27/2024 4:47:19 PM	Sent
	nathan.gould	demo.lasernet@formpipe	nathan.gould@formpipe	7/26/2024 1:11:50 PM	7/27/2024 4:47:19 PM	Sent
	nathan.gould	demo.lasernet@formpipe	nathan.gould@formpipe	7/26/2024 1:08:35 PM	7/27/2024 4:47:18 PM	Sent

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:

← ØEdit +New ■ Delete B	atch job history Recurrence	Alerts BusinessEvents	Generated files	Change status	Remove recurrence	Copy batch job Or	ptions 🔎	
Personalize	Page options	Share						
Always open for editing     Security diagnostics     Record info     Get a link ×     Create a custom alert ×       Personalize this page     Advanced filter or sort     Go to ×     Manage my alerts								
Batch job Standard view *~ P smbi								
O Job ID Status	Job description	Scheduled start date/time	Active period	Created by	Run by	Company	Batch group	Effective Scheduling Priority
O 68719976 Waiting	Email distributor batch	7/27/2024 5:12:10 PM		Admin	Admin	usmf		Normal
68719976 Waiting	Email distributor batch	7/27/2024 5:14:19 PM		Admin	Admin	usmf		Normal
68719976 Ended	Email distributor batch	7/27/2024 4:56:08 PM		Admin	Admin	usmf		Normal

#### **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**.



nance and Operations			$\mathcal{P}$ Search for a page
← 🔄 Save   Options 🛛 🔎			
<sup>My view∼</sup> Email parameters			
Configuration SMTP settings Microsoft Graph settings Test email	SMTP settings Test connection SERVER INFORMATION Outgoing mail server (smtp.office365.com) SMTP port number 587 SSL/TLS required Yes	AUTHENTICATION Authentication required Yes User name (demo.lasernet@formpipe.com) Password 	ADDITIONAL RESOURCES View email history Batch email sending status Email distributor batch

### An example of Email history:

	Finance and Operations		O Search for a pa		USMF   Con				
=	Email parameters Batch email sending status Options P								
ഹ ന	P Filter	Standard view ∽ Email history							
©	Test predefined 7/27/2024 5:17:19 PM soren.hjorth@formpipe.com	Subject helio again	Sent date and time 7/27/2024 04:47:19 PM	Email recipients nathan.gould@formpipe.com					
8=	Test predefined 7/27/2024 5:12:19 PM soren.hjorth@formpipe.com	General Email sender demo.lasernet@formpipe.com	Attachment count	Email provider ID SMTP	Sent interactively No	Email status Sent			
	Test predefined 7/27/2024 5:08:40 PM soren.hjorth@formpipe.com	Attachment details							
	Test predefined 7/27/2024 4:57:16 PM soren.hjorth@formpipe.com								
	Test predefined 7/27/2024 4:47:20 PM soren.hjorth@formpipe.com								
	test via manual email 7/27/2024 4:87:20 PM soren.hjorth@formpipe.com								
	hello again 7/27/2024 4:47:19 PM								

### An example of Batch email sending status:

← 🖾 Save + New 🗒 Delete	e Restart send Sho	w message 🛛 Email templates 🌱 Emai	I parameters Email history Op	otions $ ho$					
Batch email sending status Standard view ~ P Filter									
Email description	User ID	Sender email	Email recipients	Created date and time	Latest status change date time	Status			
0	Admin	demo.lasernet@formpipe.com	soren.hjorth@formpipe.com	7/27/2024 5:16:44 PM	7/27/2024 5:17:19 PM	Sent			
	Admin	demo.lasernet@formpipe.com	soren.hjorth@formpipe.com	7/27/2024 5:11:54 PM	7/27/2024 5:12:19 PM	Sent			
	Admin	demo.lasernet@formpipe.com	soren.hjorth@formpipe.com	7/27/2024 5:05:59 PM	7/27/2024 5:08:40 PM	Sent			
	Admin	demo.lasernet@formpipe.com	soren.hjorth@formpipe.com	7/27/2024 4:55:09 PM	7/27/2024 4:57:17 PM	Sent			
	Admin	demo.lasernet@formpipe.com	soren.hjorth@formpipe.com	7/27/2024 4:42:21 PM	7/27/2024 4:47:20 PM	Sent			
	Admin	demo.lasernet@formpipe.com	soren.hjorth@formpipe.com	7/27/2024 4:39:38 PM	7/27/2024 4:47:20 PM	Sent			
	Admin	demo.lasernet@formpipe.com	soren.hjorth@formpipe.com	7/27/2024 4:37:18 PM	7/27/2024 4:47:19 PM	Sent			
	nathan.gould	demo.lasernet@formpipe.com	nathan.gould@formpipe.com	7/26/2024 1:11:50 PM	7/27/2024 4:47:19 PM	Sent			
	nathan.gould	demo.lasernet@formpipe.com	nathan.gould@formpipe.com	7/26/2024 1:08:35 PM	7/27/2024 4:47:18 PM	Sent			