Key Usage Scenario

**Connector 365 Custom Filename** for **Microsoft Dynamics 365 Business Central**

Contents

[Setup 2](#_Toc145942160)

[Setup filenames per document type (Report Selection) 2](#_Toc145942161)

[Setup filenames per customer / vendor (Custom Report Selection) 3](#_Toc145942162)

[Define custom placeholders 5](#_Toc145942163)

[Using the set up filename(s) 7](#_Toc145942164)

# Setup

**Connector 365 Custom Filename** can be used to customize the default filename of documents that are sent via E-Mail or saved on the hard drive.

For the following examples we will demonstrate the use oft he app with sales invoices. However, this function is compatible with other reports as well.

## Setup filenames per document type (Report Selection)

One way to define your own file names is to set up file names per document type. For this purpose, file names as well as placeholders are entered in the respective **report selections**.

1. To set up a custom filename for **sales invoices**, open the search for **Report Selection – Sales** and open it.
2. Select **Invoice** from the Usage drop down menu.
3. If not already set up, set up a report to be processed.

Ein Bild, das Text, Reihe, Schrift, Zahl enthält.

Automatisch generierte Beschreibung

1. On the field **Filenames**, click on the number that is shown on this field indicating the number of custom filenames already setup.
2. A new window will open, allowing the user to set up custom **filenames** and **placeholders**.

Ein Bild, das Text, Reihe, Schrift, Screenshot enthält.

Automatisch generierte Beschreibung

1. You can now configure your own file names for any language code available.

Click on the arrow oft he Language Code field. This will allow you to chose language codes that are set up in your system.

Ein Bild, das Text, Screenshot, Zahl, Software enthält.

Automatisch generierte Beschreibung

1. Choose your desired language code.
2. No go to the Filename field and type in your desired filename your specified language code.

You can also put placeholders in your file name.

Ein Bild, das Text, Reihe, Schrift, Screenshot enthält.

Automatisch generierte Beschreibung

1. To define your placeholders, click on the **3 dots** inside the **Filename** field. A new window will open, in which you can define your placeholders.

## Setup filenames per customer / vendor (Custom Report Selection)

In addition to the possibility of creating file names per report, individual file names can also be created for individual **customers** and **vendors**.

1. With the **Microsoft Dynamics 365 Business Central** Dashboard open either navigate to **customers** or **vendors**. Since this example is about **sales invoices**, we will use **customers** in this case.
2. Select the desired **customer/vendor** you want to define a custom filename for and open its card.
3. Click on **Customer -> Document Layouts**.

Ein Bild, das Text, Schrift, Reihe, Screenshot enthält.

Automatisch generierte Beschreibung

1. Select the desired usage and add the correct report id.

Ein Bild, das Text, Schrift, Reihe, Zahl enthält.

Automatisch generierte Beschreibung

1. Click into the **filename** field, and entert he desired filename. You can also put placeholders inside the new **filename**.
2. Click on the **3 dots** inside the Filename field. A new window will open, in which you can define your placeholders.

## Define custom placeholders

The **placeholder** page you will find two fields. One fort he placeholder to resolved and one for its definition.

Ein Bild, das Text, Screenshot, Schrift, Reihe enthält.

Automatisch generierte Beschreibung

1. Click into the Placeholder field and define a placeholder – for example **%1**. Any 4 alphanumerical combination is valid. Note however that if just text is used, there might be an isse where text is replaced by a placeholder, therefore rwe recommend only using numbers and special characters.

Ein Bild, das Text, Screenshot, Reihe, Schrift enthält.

Automatisch generierte Beschreibung

1. Next, click into the **Definition** field and click on the **3 dots.**
2. Another window will open with a table that includes all valid definitions that can be used for as a placeholder. On the one hand, all fields from the **company information** are available to you.

On the other hand, fields from the table header oft he currently edited document type are available. In this case, we will have fields of the **sales invoice header** available.

Ein Bild, das Text, Screenshot, Zahl, Schrift enthält.

Automatisch generierte Beschreibung

1. Click on the desired field, for eample **No**. Of **sales invoice header**, and confirm your selection with OK.
2. Repeat this process for all **placeholders** you want to set.

Ein Bild, das Text, Screenshot, Reihe, Schrift enthält.

Automatisch generierte Beschreibung

# Using the set up filename(s)

Now we can see the result oft he setup and see if everything was set up correctly.

For this scenario, we will send a posted sales invoice to a customer via E-Mail.

1. With the Dynamics 365 Business central dashboard open, open one oft he previously set up reports. For example **posted sales invoices**.
2. Select any document or alternatively one where the customer has been set up with a custom filename using **document layouts**.
3. Select **Print / Sent -> Send by Email**.
4. Check the attachments. The attached file should have your set up filename.

Ein Bild, das Text, Schrift, Software, Screenshot enthält.

Automatisch generierte Beschreibung