Dynamic Values for
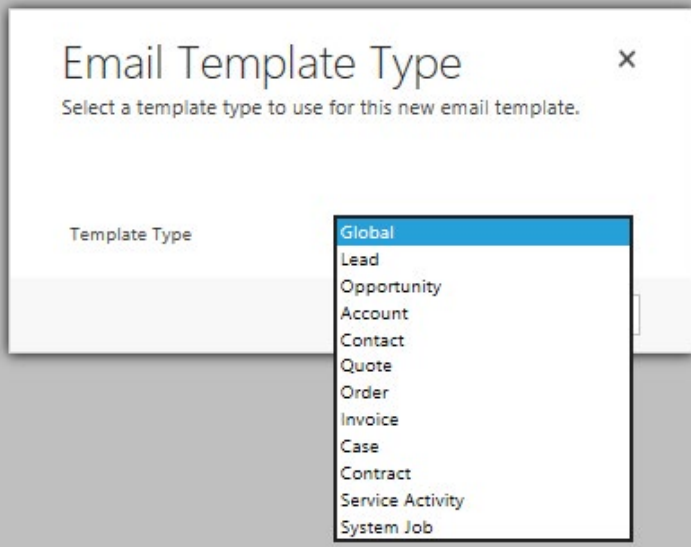## Custom Entities in D365 Email Templates
PART 2

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Creating Email Templates in Microsoft Dynamics 365 a very simple task, on the surface. You write what the Subject will be, followed by the Body of the message, and just like that you've created an email template. However, there are instances when you might want to add some Dynamic values based on the record.
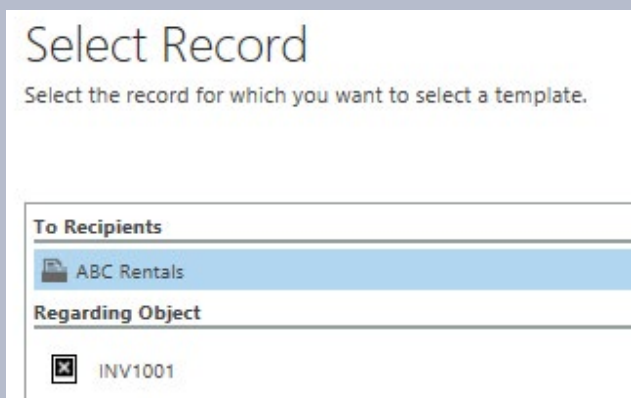
Template Types

When creating a new email template, you first get prompted to select an Email Template Type.

If you select a Template Type aside from Global, you must have a record matching that type in either the Regarding field or any of the Send To, CC, or BCC fields. You will also be able to easily insert dynamic values into the template for that record type. If you so choose, you could write out the dynamic values as shown, but it's much easier to use the out of the box method to select them.
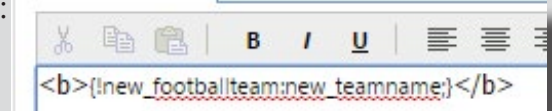
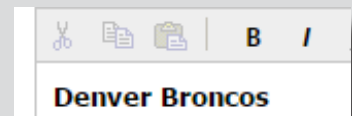With global templates, you can insert the template regardless of what entity record you select:

The Global Template Type is what you'd want to use for custom entities, or any other entity not listed in the template type drop down menu. Regardless of the way you insert values, whether you use the out of the box insert method or you manually type it in, you can only insert values from one record.

The Inclusion of HTML

There were also some great questions around HTML. For starters, all of these dynamic values can be used, like all templates, with HTML code. For example, if we wanted to bold a dynamic value, we could put the dynamic value between a bold tag, seen here:
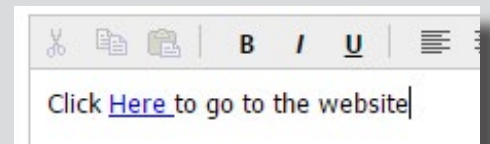

After inserting the template, you'll notice the bold text is now visible:

Furthermore, if you have a field value that is a URL, you can insert this value into the href on an anchor tag and create a dynamic hyperlink in your email:

This will be displayed as:

Dynamic URL Pointing to CRM Record

In order to open a record with a URL, all you need is the server name (which is just your CRM URL), the entity logical name, and the entity ID. Then using those three components, we can include them within our href on our anchor tag:

{Server Name}/main.aspx?id={Entity Id}&newWindow=true&etn={Entity Name}&pagetype=entityrecord

Note: You might notice we have a few other options. "newWindow=true" just means we want to open this URL in a new window. "Pagetype=entityrecord", just means we want to open the entity record.

The only thing we are missing is the Entity Record ID, but we can get this using our dynamic value. Usually (you may need to check the fields on your entity to confirm this), the ID field is the entity name plus 'id'. For my football team entity, this field is new_footballteamid. If we let our server have the IP name of 192.168.1.1, we now have all the information we need to create the URL and insert it into the href of our anchor tag: