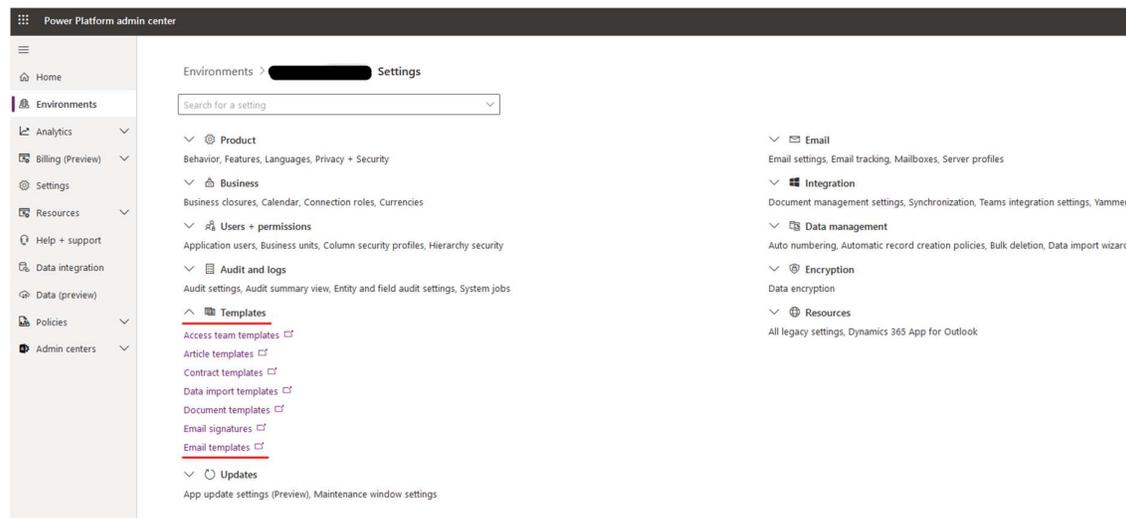


Adding dynamic values from custom tables (entities) to email templates

It is straight forward to create new email templates in Microsoft Dynamics 365 for out of the box tables like the Company, Contact, Opportunity, Quote or User etc. But if you wish to create one for a custom table it is a little more involved.

You browse to: - <https://admin.powerplatform.microsoft.com/>, you select the correct environment, click on Templates and then Email templates.



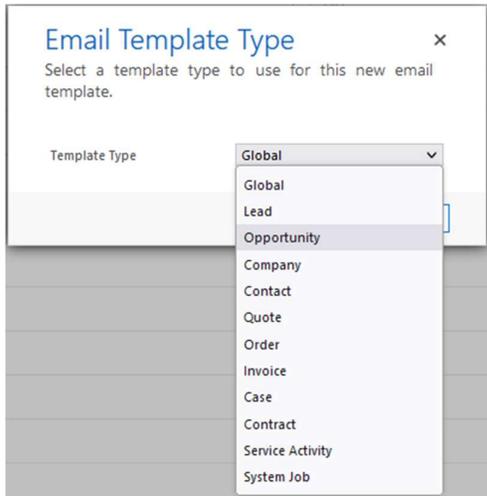
You click 'New', from the email templates screen.

Email Templates

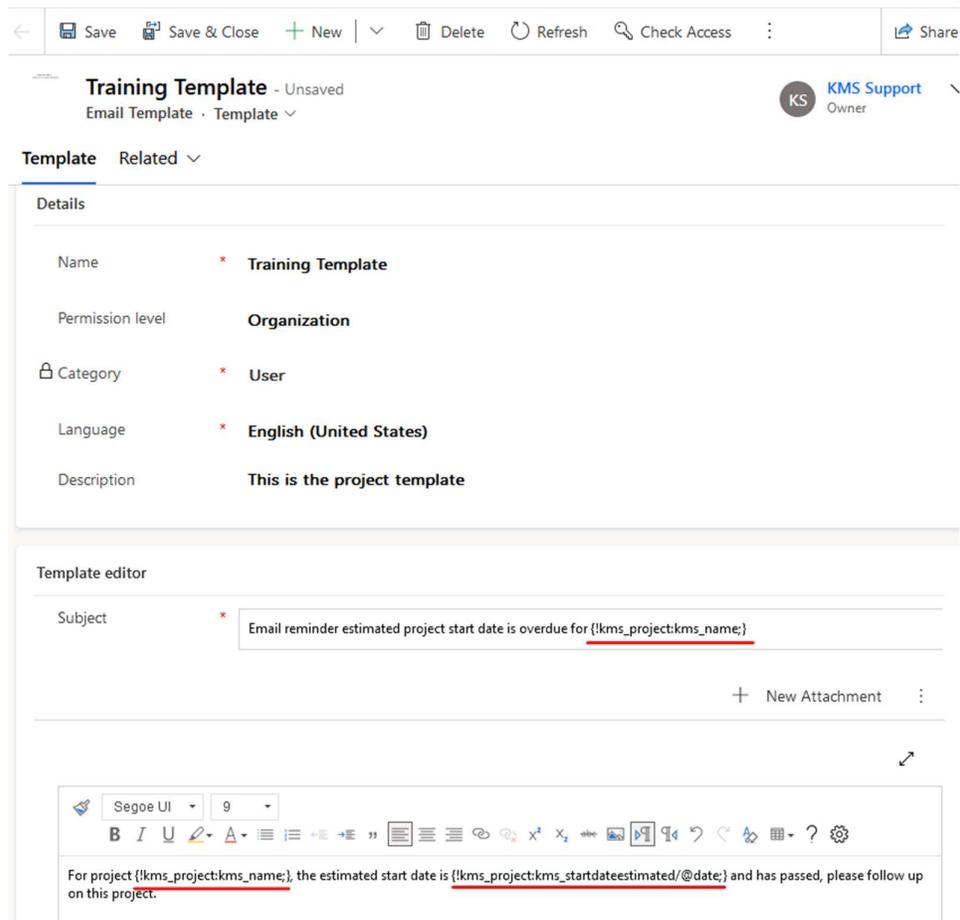
[New](#) |  |  |  Run Workflow... |  Start Dialog | More Actions ▾

<input type="checkbox"/>	Title ↑	Template Type	Viewable By	Language	Reply Rat...
	Account Reconnect	Company	Organization	English(1033)	
	Bulk Deletion Task Completed With Failure Temp...	System Job	Organization	English(1033)	
	Bulk Deletion Task Completion Template	System Job	Organization	English(1033)	
	Bulk Deletion Task Failed Template	System Job	Organization	English(1033)	

You select 'Global' as the Email Template Type.



You now enter a Name, change Permission level to 'Organizational', add a Description and a Subject. In the 'Subject' area at the end I have added a dynamic value which will show the project name. At the email detail level I have added the project name and the estimated start date for the project, with some standard text.



Save Save & Close + New | Delete Refresh Check Access Share

Training Template - Unsaved
Email Template · Template

KS KMS Support Owner

Template Related

Details

Name * **Training Template**

Permission level **Organization**

Category * **User**

Language * **English (United States)**

Description **This is the project template**

Template editor

Subject * Email reminder estimated project start date is overdue for {!kms_project:kms_name;}

+ New Attachment

Segoe UI 9

B I U [Rich Text Editor Icons]

For project {!kms_project:kms_name;}, the estimated start date is {!kms_project:kms_startdateestimated/@date;} and has passed, please follow up on this project.

When you click save, the dynamic values will resolve.



Template Related ▾

Details

Name	* Training Template
Permission level	Organization
Category	* User
Language	* English (United States)
Description	This is the project template

Template editor

Subject * Email reminder estimated project start date is overdue for `{!Project:Name;}`

+ New Attachment ⋮

↗

Segoe UI 9

B *I* U

For project `{!Project:Name;}`, the estimated start date is `{!Project:Estimated Site Start;}` and has passed, please follow up on this project.

So to add these dynamic fields the format is `{!<entitylogicalname>: <fieldlogicalname>;}`

One thing to be aware of when adding a date field it will show the date and the time so if you just want the date you, you add what I did with a `/@date` at the end. My example was `{!kms_project:kms_startdateestimated/@date;}`.

If you just wanted to show the time you add `/@time` at the end.

For lookups and option / choice fields you need to add `/@name` at end.

If you wish it is possible to use html, for example to make the project name to appear bold, you just need to add `{!kms_project:kms_name;}`.

You can also add a hyperlink to a website / URL in your email as well, to do this use href. Example below: -

Click ` Here ` to go to the website

Click [Here](#) to go to the website