

Dynamica Pre-Migration Report Generator User Guide

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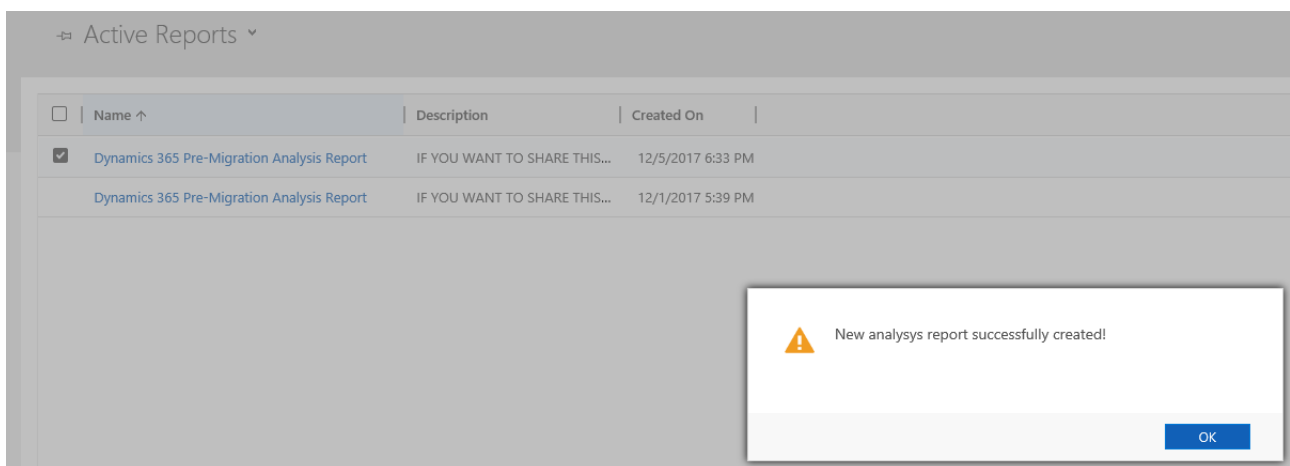
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1. Package Overview

After installation of package new Entity “DNL Report” is added to your CRM system. It will contain information about system users and fields customizations for the key entities (Account, Contact, Opportunity, Lead, Case, Product, Price List, Task).

2. Create new Report

To create a new report - use “**Generate new report**” ribbon button from Dynamica Report Main Grid view.



Pre-migration report will be generated and a new Dynamica Labs Dynamics 365 Partner Account will be also created if you are using the solution for the first time.

Dynamics 365

Sales

Accounts

> Dynamica Part

+ NEW

DEACTIVATE

CONNECT

ADD TO MARKETING LIST

ASS

ACCOUNT

Dynamica Partner Account

Summary

ACCOUNT INFORMATION

* Account Name

Dynamica Partner Account

Phone

Fax

Website

Parent Account

Ticker Symbol

Email

support@dynamicalabs.com

POS

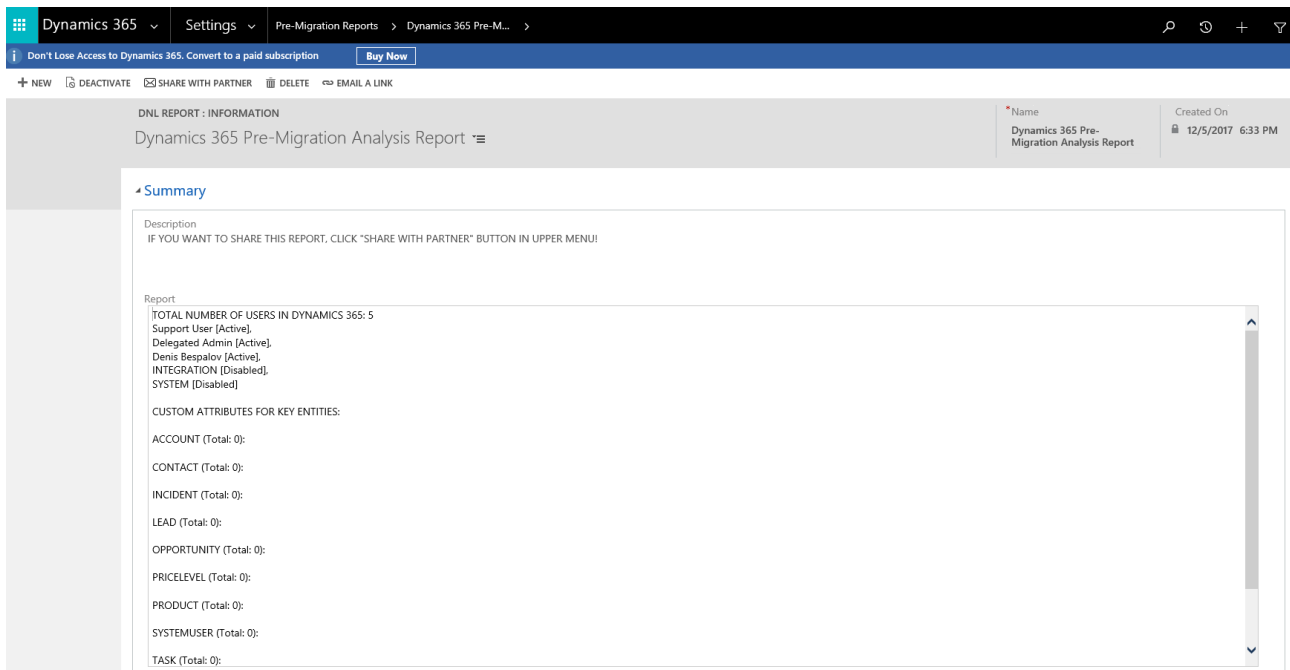
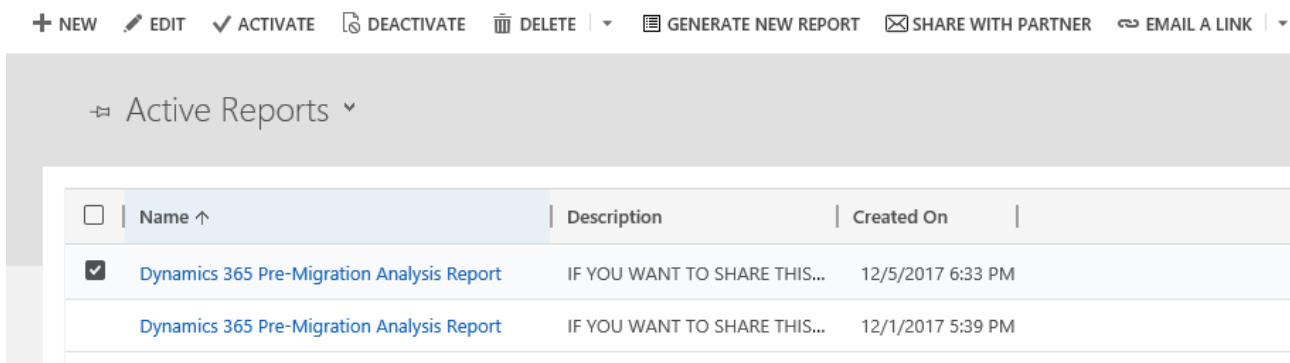
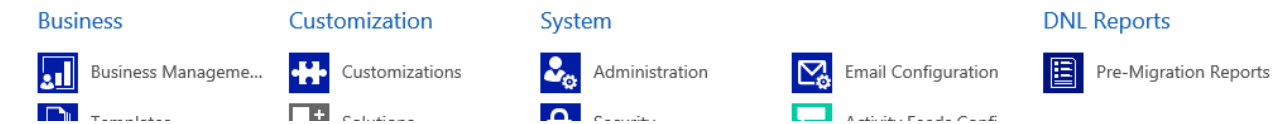
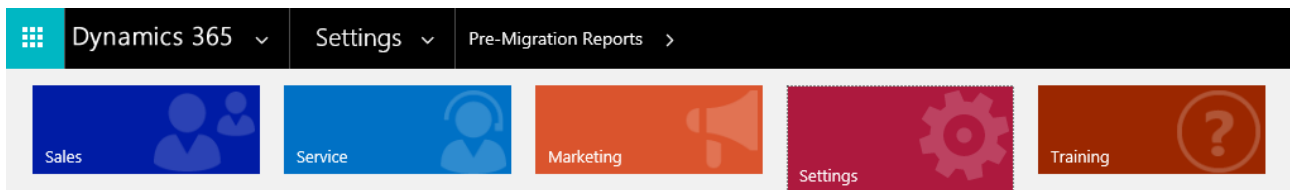
Enter post

All posts

After the report has been created – you can share it with Dynamica Labs Dynamics 365 Partner.

3. Pre-Migration Report location

To open Pre-Migration Report – go to **Settings->DNL Reports->Pre-Migration Reports** and select in the list newly generated report.



4. Share report with partner

To share current report with Dynamica Labs Dynamics 365 Partner – use “**Share with partner**” ribbon button.

The screenshot shows the Dynamics 365 user interface. The top navigation bar includes 'Dynamics 365', 'Settings', 'Pre-Migration Reports', and 'Dynamics 365 Pre-M...'. Below this is a blue banner with the message 'Don't Lose Access to Dynamics 365. Convert to a paid subscription' and a 'Buy Now' button. The main ribbon contains buttons for '+ NEW', 'DEACTIVATE', 'SHARE WITH PARTNER', 'DELETE', and 'EMAIL A LINK'. The 'SHARE WITH PARTNER' button is highlighted. Below the ribbon, the page title is 'DNL REPORT : INFORMATION' followed by 'Dynamics 365 Pre-Migration Analysis Report'. A 'Summary' section is expanded, showing a description: 'IF YOU WANT TO SHARE THIS REPORT, CLICK "SHARE WITH PARTNER" BUTTON IN UPPER MENU!'.

An email message will be send to the Dynamica Labs Dynamics 365 Partner Account (created automatically after first report is generated).

The screenshot shows a table of reports in the Dynamics 365 interface. The table has columns for 'Name', 'Description', and 'Created On'. Two reports are listed, both titled 'Dynamics 365 Pre-Migration Analysis Report' with the description 'IF YOU WANT TO SHARE THIS...'. The first report was created on 12/5/2017 at 6:33 PM, and the second on 12/1/2017 at 5:39 PM. A confirmation dialog box is displayed in the bottom right corner, stating 'Email to partner account successfully created!' with an 'OK' button.

<input type="checkbox"/>	Name ↑	Description	Created On
<input checked="" type="checkbox"/>	Dynamics 365 Pre-Migration Analysis Report	IF YOU WANT TO SHARE THIS...	12/5/2017 6:33 PM
<input type="checkbox"/>	Dynamics 365 Pre-Migration Analysis Report	IF YOU WANT TO SHARE THIS...	12/1/2017 5:39 PM

You have to configure email-router for you user first, in other case email will stuck in “Pending Send” state.

Follow the link to Learn more on how to do that: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/set-up-server-side-synchronization-of-email-appointments-contacts-and-tasks>

EMAIL ▾

Dynamics 365 Pre-Migration An... ▾

Priority	Due	Status Reason
Normal	_____	Pending Send

i This message has not yet been submitted for delivery. For more information, see help.

From	Denis Bepalov
To	Dynamica Partner Account
Cc	_____
Bcc	_____
Subject	Dynamics 365 Pre-Migration Analysis Report Tuesday, December 5, 2017 CRM:0001010

TOTAL NUMBER OF USERS IN DYNAMICS 365: 5

Support User [Active],
Delegated Admin [Active],
Denis Bepalov [Active],
INTEGRATION [Disabled],
SYSTEM [Disabled]

CUSTOM ATTRIBUTES FOR KEY ENTITIES:

ACCOUNT (Total: 0):

CONTACT (Total: 0):

INCIDENT (Total: 0):

LEAD (Total: 0):