

# User Guide



**Report to PDF**

*Document Version: 1.0*

*Solution Version: 365.072017.3.3*

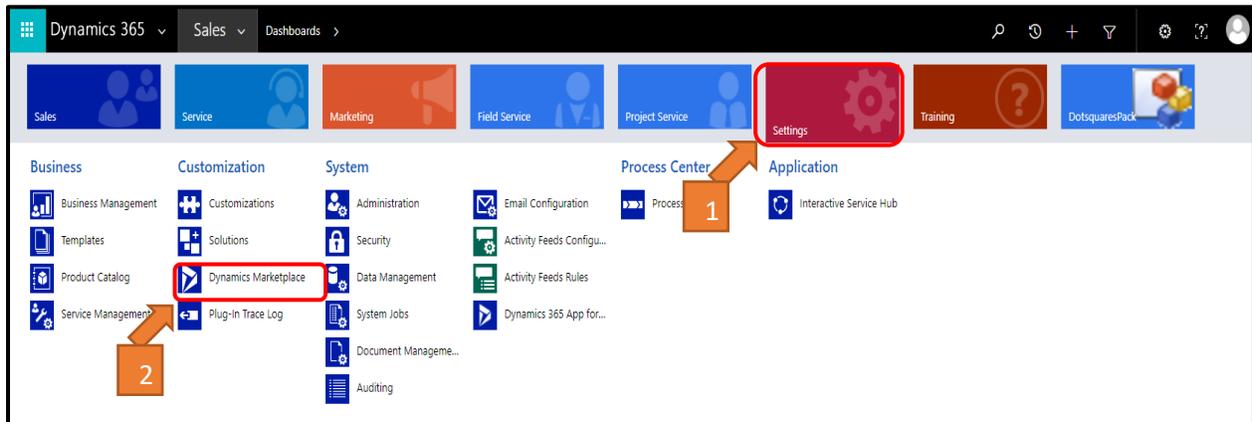
## Table of Contents

How to install Report to PDF Solution? .....	3
Configuration Settings in Report to PDF.....	7
Report to PDF Functionality.....	10
Attach To Notes:.....	10
Attach To Email: .....	12
Open PDF: .....	13
Save To Excel: .....	14
Uninstall Report to PDF .....	15

## How to install Report to PDF Solution?

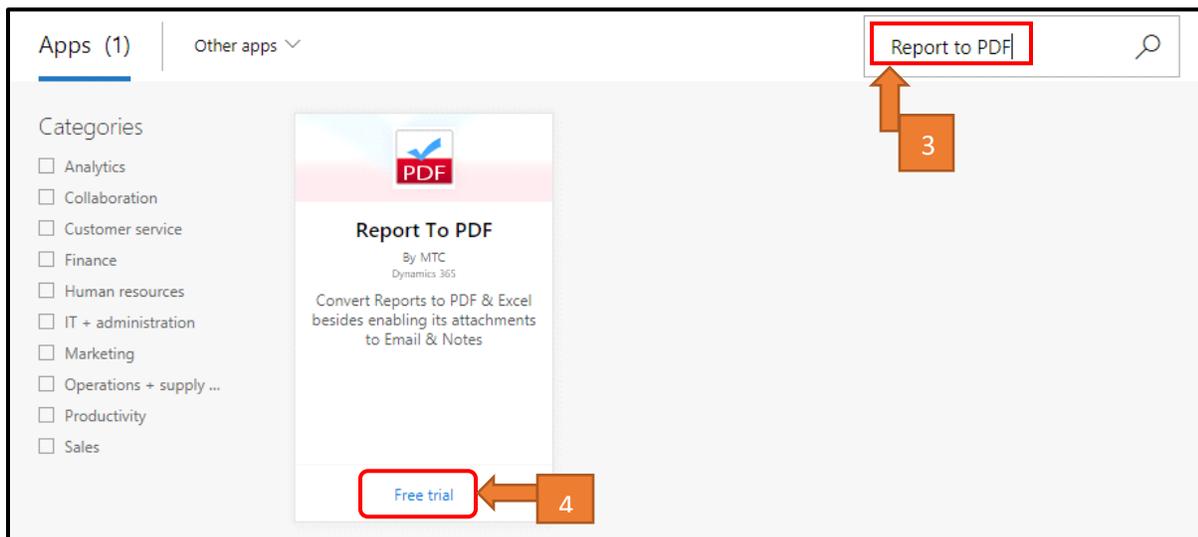
### Step1:

- Navigate to **Dynamics 365 -> Settings** and click on **Dynamics Marketplace**.



### Step2:

- In the search box, search for **Report to PDF by MTC** and click on **free trial**.



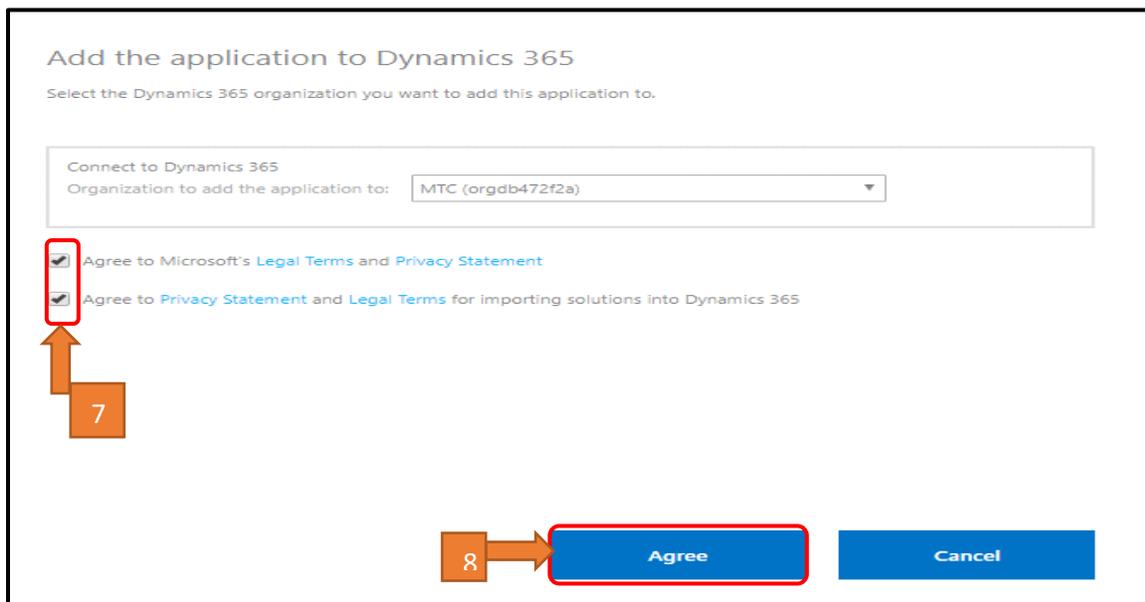
**Step3:**

- Please tick the **Check Box** to give permissions and click on **Continue**.



**Step4:**

- Please tick the two check boxes to agree **Microsoft Legal Terms and conditions** and agree to **Privacy Statement and Legal Terms** and click on **Agree** for importing the solution.



**Step5:**

- After clicking on agree the **Installation Process Begins**.

Dynamics 365 Portals - Par...	8.3.0.215	1/1/2050	Not installed
Dynamics 365 Sales Applic...	1.0.0.1	1/1/2050	Installed
E-PDF	365.72017.3.3	1/1/2050	Installation pending
Field Service	6.2.1.38	1/1/2050	Not installed

**Step6:**

- After completing the installation, you will notice that **licensing solution** also installed along with EPDF Solution.
- To get the free trial Click on **licensing solution**.

EPDF	E-PDF	365.072017....	9/5/2017	Managed
ActivityTimer	Activity Timer	365.082017....	9/3/2017	Managed
AlertRibbonSolution	AlertRibbonSolution	1.0.0.0	8/31/2017	Managed
Alerts	Alerts	2016365.06...	8/31/2017	Managed
Licensing	Licensing	1.0.5.5	8/31/2017	Managed

**Step7:**

- Please fill up the **Account Information** and click on **submit**. "This will be a onetime activity."

**ACCOUNT INFORMATION**

<p>First Name* <input type="text" value="Harish"/></p> <p>Phone* <input type="text" value="1234567892"/></p> <p>Website* <input type="text" value="www.mtccrm.com"/></p> <p>City* <input type="text" value="hyderabad"/></p> <p>Country* <input type="text" value="india"/></p>	<p>Last Name* <input type="text" value="Kumar"/></p> <p>Company* <input type="text" value="MTC"/></p> <p>Email* <input type="text" value="marothiamohit.1998@gmail.com"/></p> <p>State/Province* <input type="text" value="telangana"/></p> <p>Zip/Postal Code* <input type="text" value="500050"/></p>
---	---

Submit
10

**Step8:**

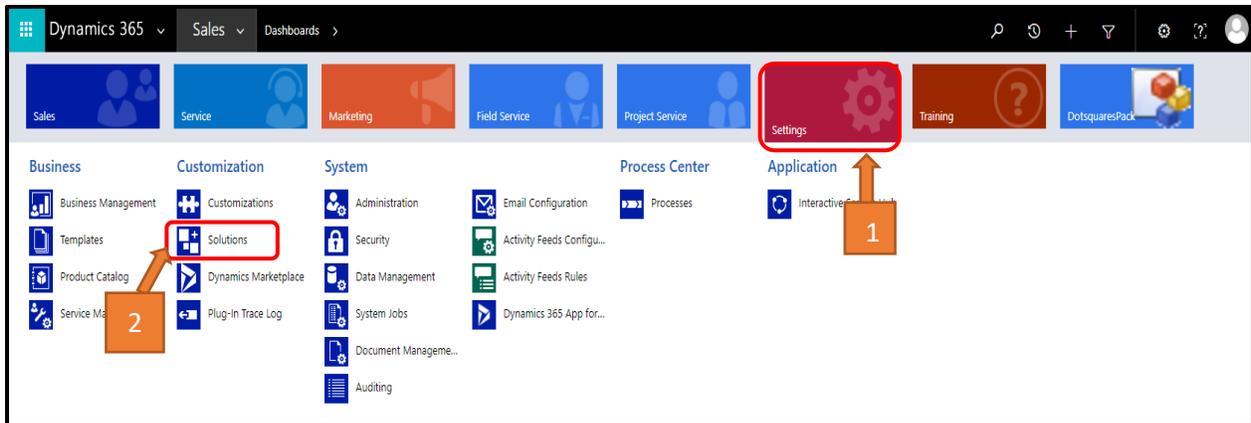
- After submitting the registered form, below you can get all the MTC products and you can find **Report to Pdf** as **Installed**.

CRMStarterPack			<a href="#">Purchase As Bundle</a>	<a href="#">Update License</a>
Activity Calendar		<a href="#">Get it Now</a>		
Alerts		Installed	<a href="#">Purchase License</a>	<a href="#">Update License</a>
CRM Picture		<a href="#">Get it Now</a>		
Auto Number		<a href="#">Get it Now</a>		
Note Pro		<a href="#">Get it Now</a>		
Report To PDF		Installed	<a href="#">Purchase License</a>	<a href="#">Update License</a>

## Configuration Settings in Report to PDF

### Step1:

- Navigate to Dynamic 365 -> Settings and click on solutions.



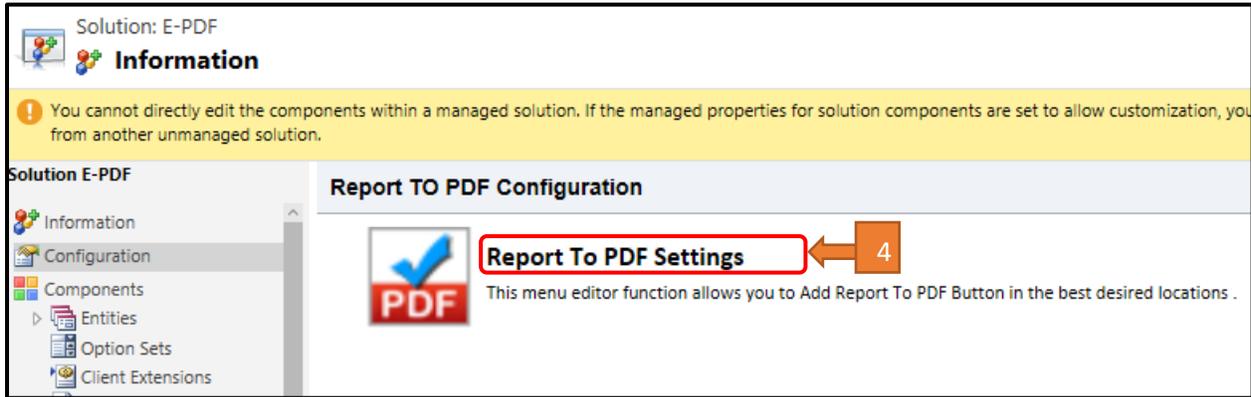
### Step2:

- Click on E-PDF to start the process of configuration.

EPDF	<b>E-PDF</b>	365.072017....	9/5/2017	Managed
Licensing	Licensing	1.0.5.5	8/31/2017	Managed
FieldServiceDemoAutoMove	Field Service Demo Auto...	6.1.0.1	8/17/2017	Managed
ResourceSchedulingDemo...	Resource Scheduling Dem...	1.0.0.4	8/17/2017	Managed
ProjectServiceDemoData	Project Service Demo Data	1.0.1.4	8/17/2017	Managed

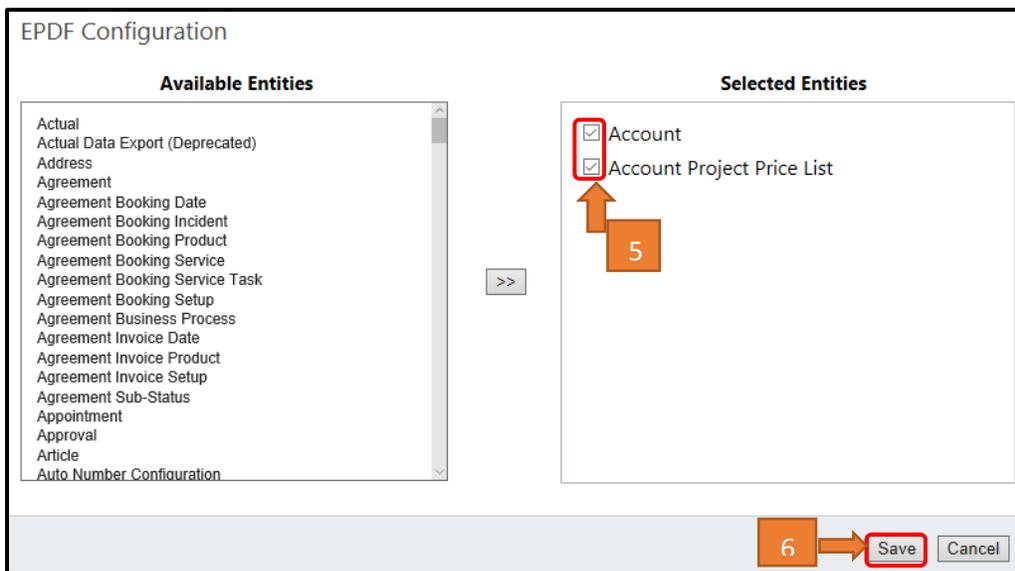
**Step3:**

- Click on Report to PDF Settings.



**step4:**

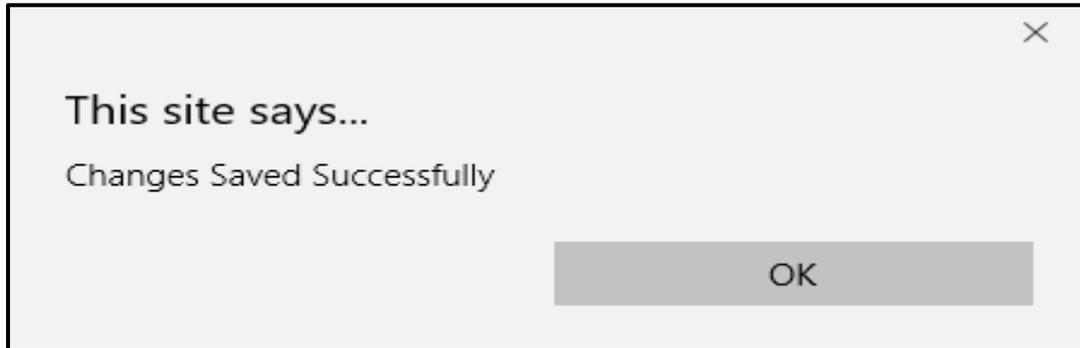
- Select the **Entities** for which you want to have Report To PDF functionality from the list Box and click on Double Arrow ">>" so that it is moved to Selected Entities pane.
- Tick the check boxes and click on **save**.
- For example, let's find out how **Report to PDF** work on **Account** entity.



---

**Step5:**

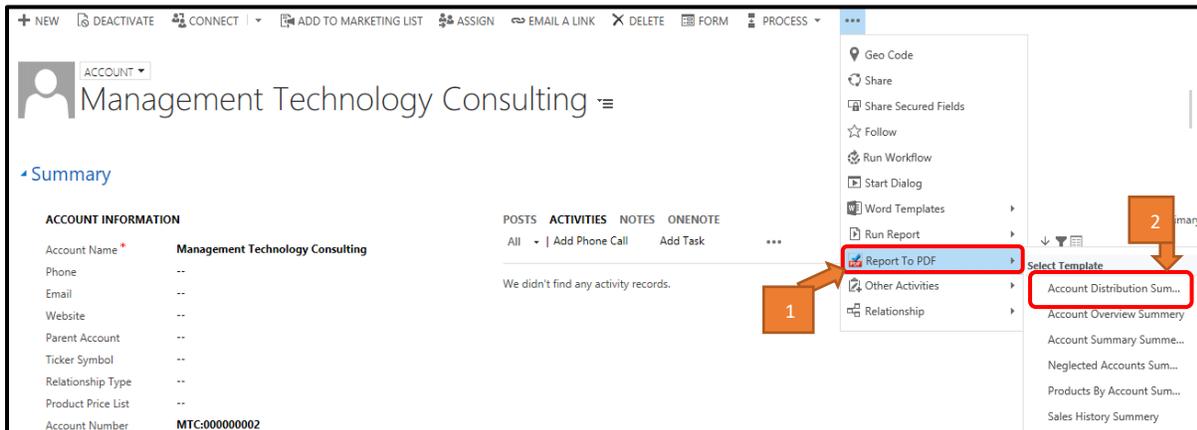
- After clicking on save button, Changes Saved Successfully popup message will be displayed. Click on OK.



## Report to PDF Functionality

### Step1:

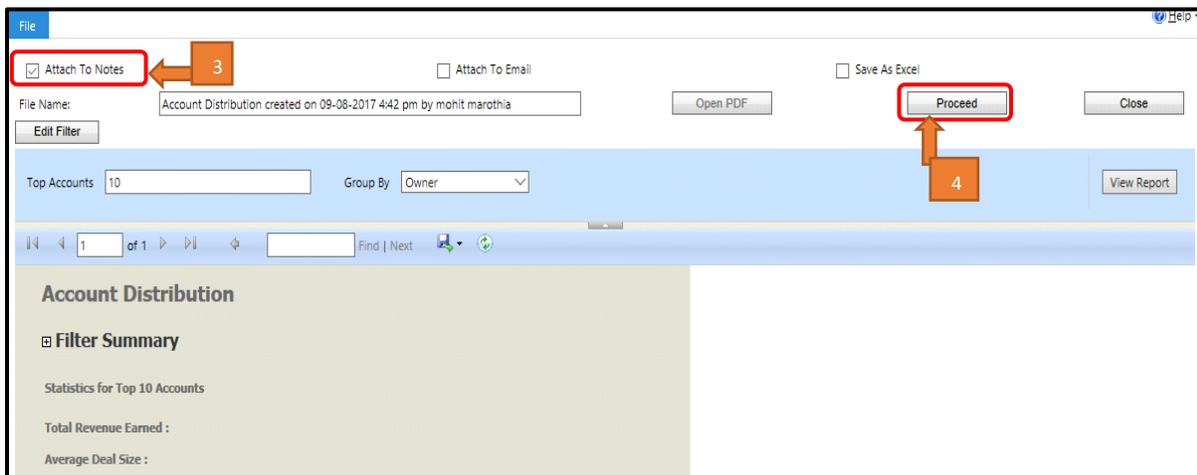
- Navigate to **Dynamic 365** and click on **Sales** and select **Accounts**.
- Create a **new Account record**. Click on **more** options and click on **Report to PDF**, and select any templates (refer image below) as for example let's find out how it's working on **Account Distribution Sum**.



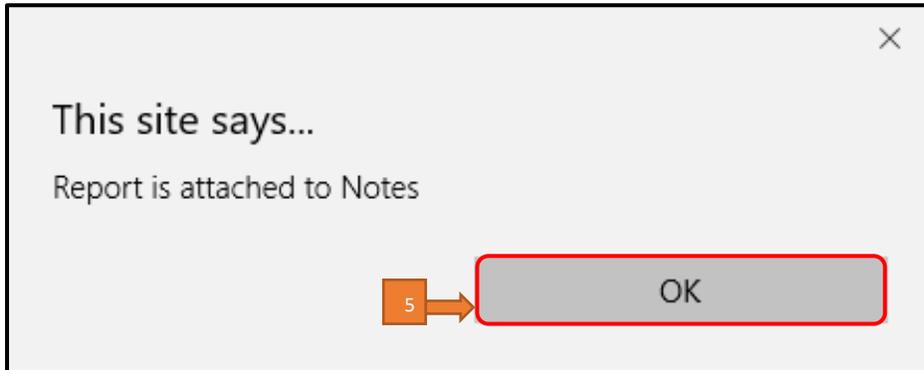
- You can **Attach to Notes, Attach to Email, save as Excel** and **open as PDF file** the Account Distribution Sum report.

### Attach To Notes:

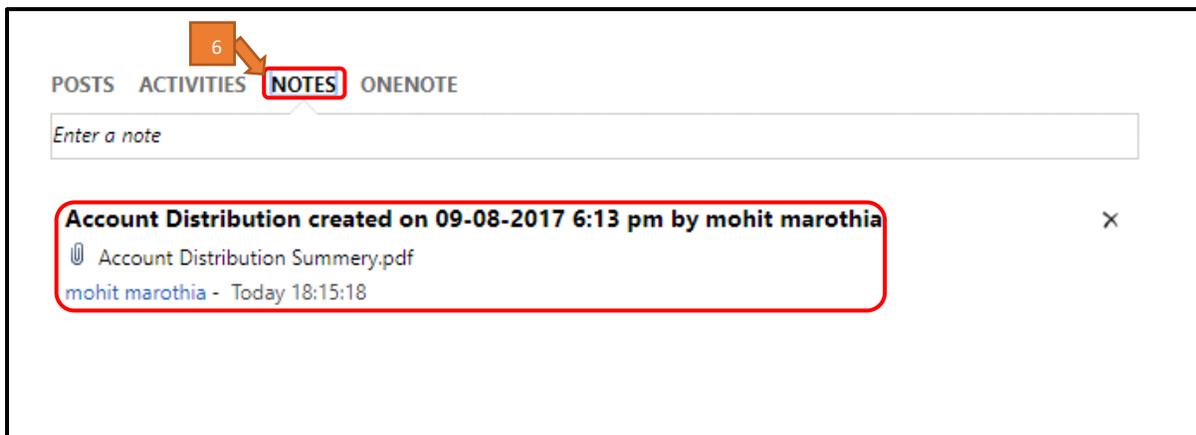
- Select the check box of **Attach to Notes** and then click on **Proceed**. File name is auto generated.



- After clicking on Proceed, a window box opens and displays message as **Report is attached to Notes**. Click on **OK**.

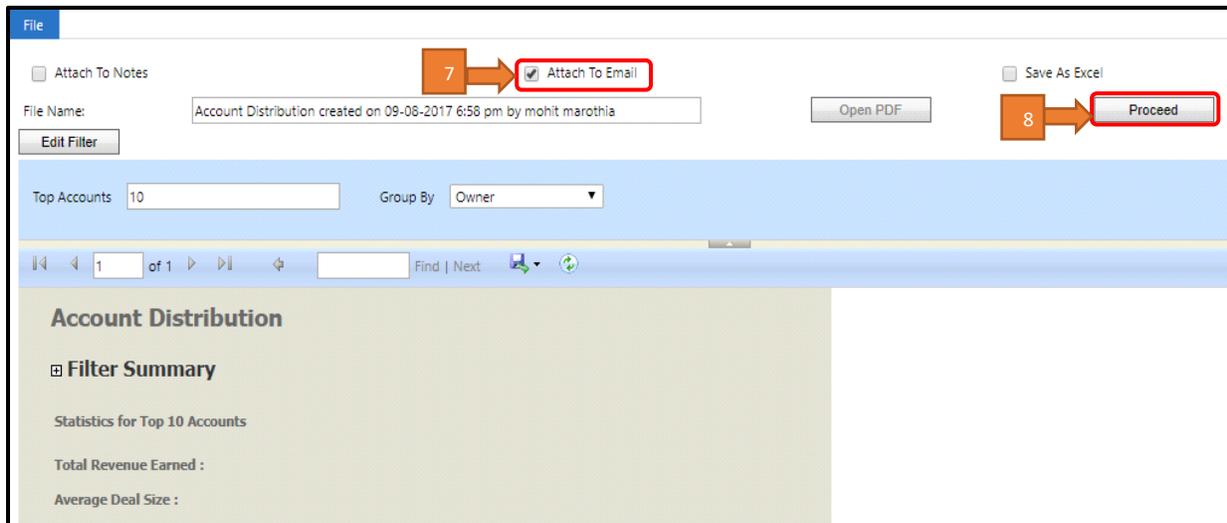


- The selected report will be attached as Notes. To know where it is saved click on the **NOTES** as shown in figure below.



## Attach To Email:

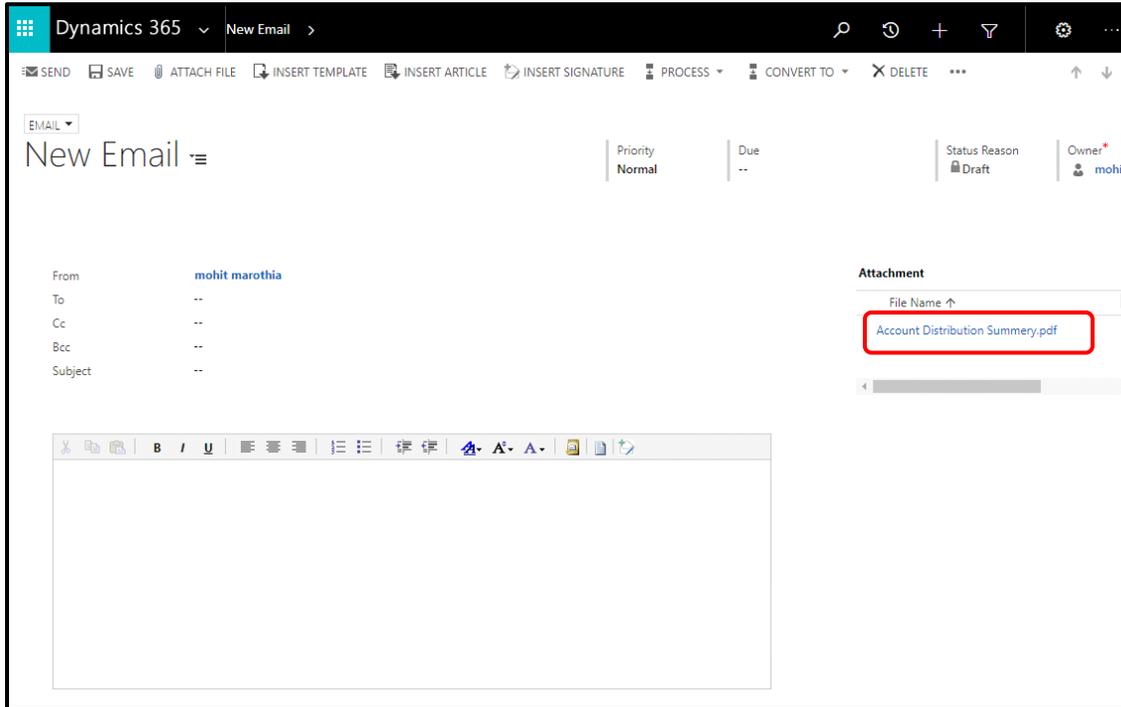
- Select the check box of **Attach to Email** and then click on **Proceed**. File name is auto generated.



- After clicking on Proceed a window box opens and displays message as **Report is attached to email**. Click on **OK**.

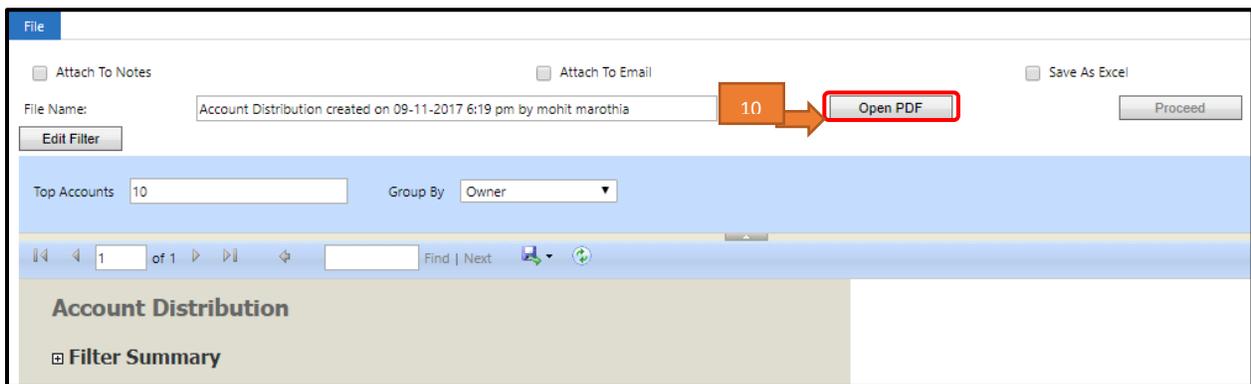


- A new window will open with Email and attachment details. In Attachments you can see the PDF file attached as **Account Distribution Summary.pdf** Attach to Email as shown below figure.
- You can send this email by clicking **Send** button in **CRM ribbon**.



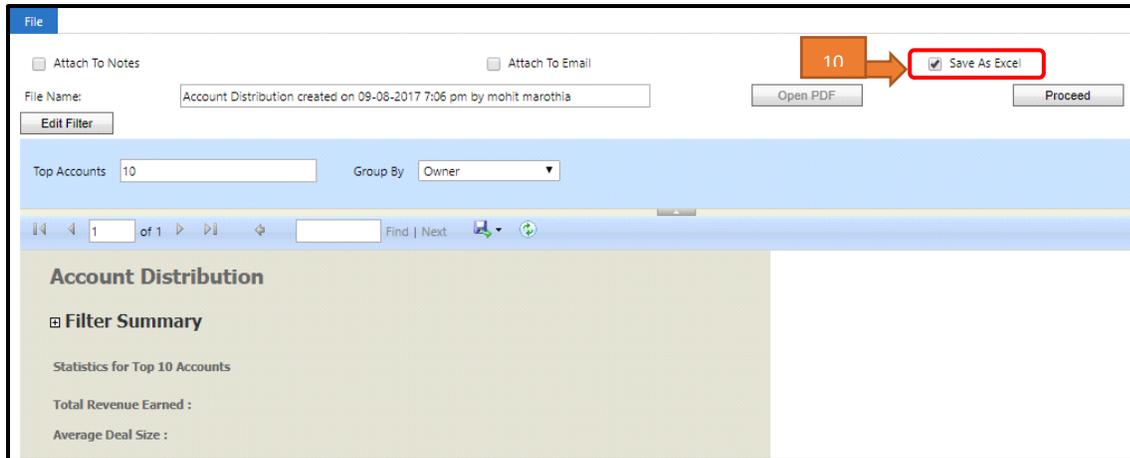
### Open PDF:

- Click on **Open PDF** to download the report in the form of PDF.
- A new window will open where the PDF files has been downloaded.



## Save To Excel:

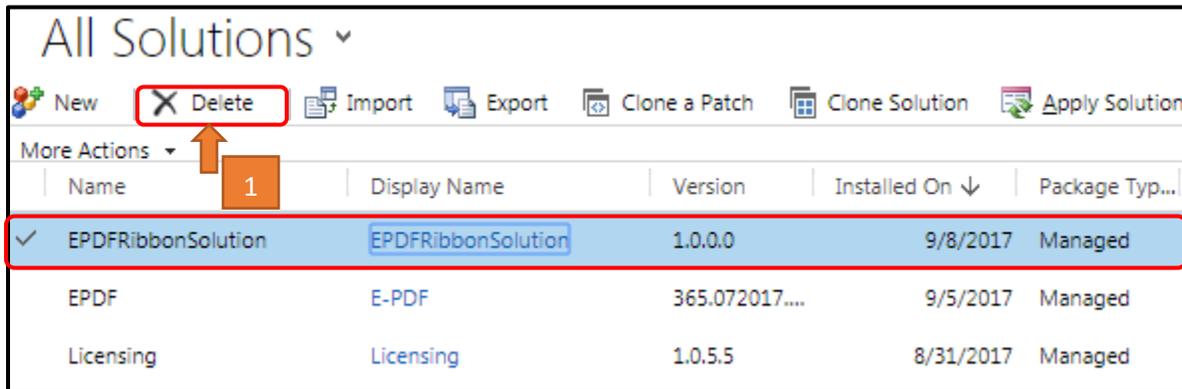
- Select the check box of **Save to Excel** and then click on Proceed. File name is auto generated.
- A new window will open with the downloaded **Excel sheet** and you can open that excel sheet from the new window



## Uninstall Report to PDF

### Step1:

- Navigate to **Dynamic 365 -> Settings** and click on **Solutions**.
- Upon Configuring the Report to PDF setting will get **EPDFRibbonSolution**. In order to delete the **EPDF solution** first we need to delete **EPDFRibbonSolution**.
- Select the solution and click on **Delete**.



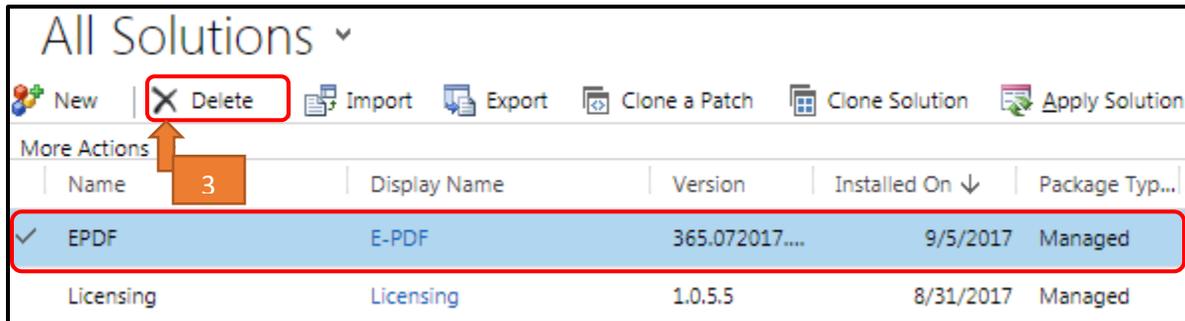
### Step2:

- Click on **OK** to start uninstallation process of **EPDFRibbonSolution**.



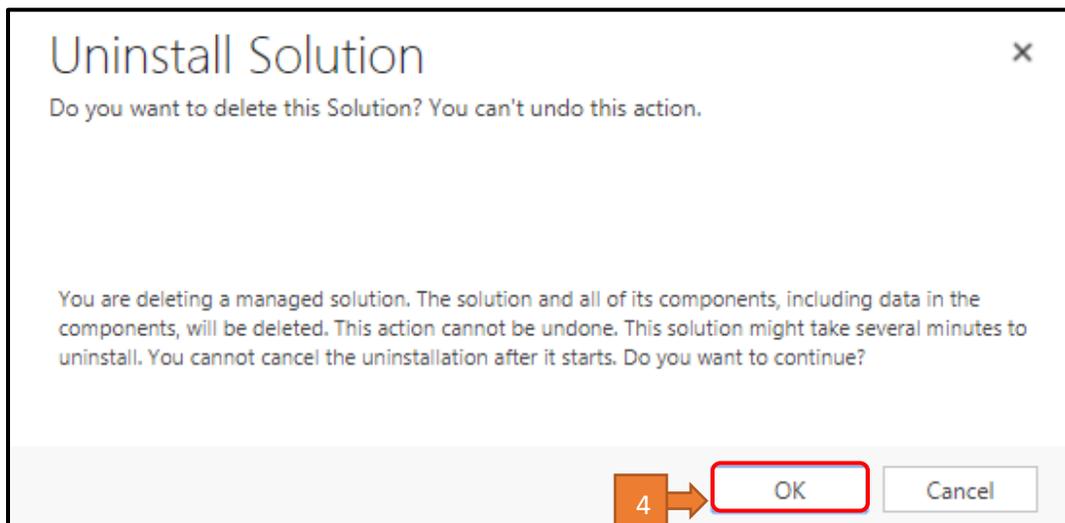
**Step3:**

- Select EPDF solution and click on **Delete**.



**Step4:**

- Click on **OK** to start uninstallation process of EPDF Solution.



**Step5:**

- Navigate to **licensing** to check whether the solutions has been uninstalled or not.

Name	Display Name	Version	Installed On ↓	Package Typ...
Licensing	Licensing	1.0.5.5	8/31/2017	Managed
FieldServiceDemoAutoMove	Field Service Demo Auto ...	6.1.0.1	8/17/2017	Managed

**Step6:**

- Click on **licensing**. You can see that Alerts solutions has been changed to **Get It Now** from **Installed**. But the expiry date will be as usual.

Solution: Licensing  
Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow cus from another unmanaged solution.

Solution Licensing

Products	Expiry Date	No of Users	
<b>CRMStarterPack</b>			
Activity Calendar			<a href="#">Get it Now</a>
Alerts			<a href="#">Get it Now</a>
Note Pro			<a href="#">Get it Now</a>
Report To PDF	9/20/2017	0	<a href="#">Get it Now</a>
Auto Number			<a href="#">Get it Now</a>
CRM Picture			<a href="#">Get it Now</a>