

User Guide



Report to PDF

Document Version: 1.0

Solution Version: 365.072017.3.3

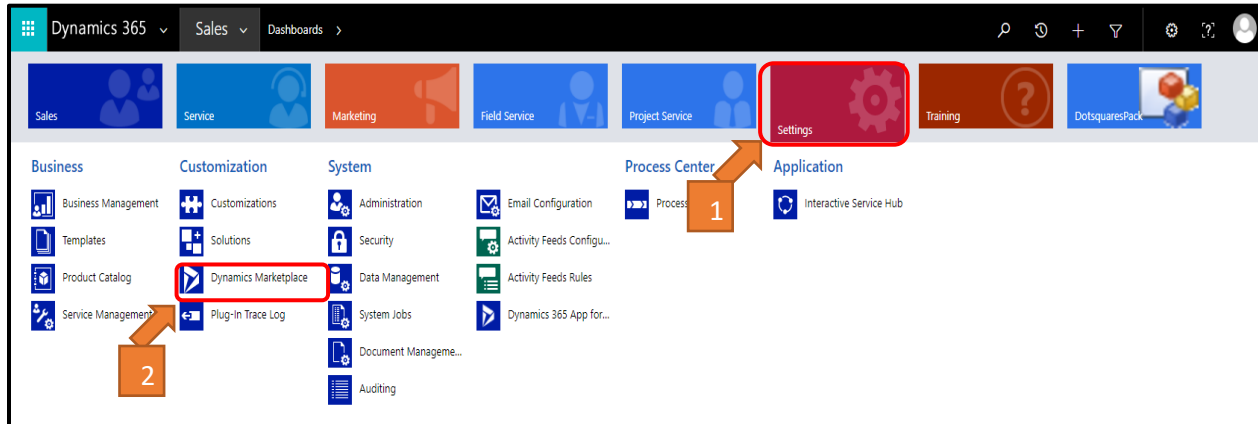
Table of Contents

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?

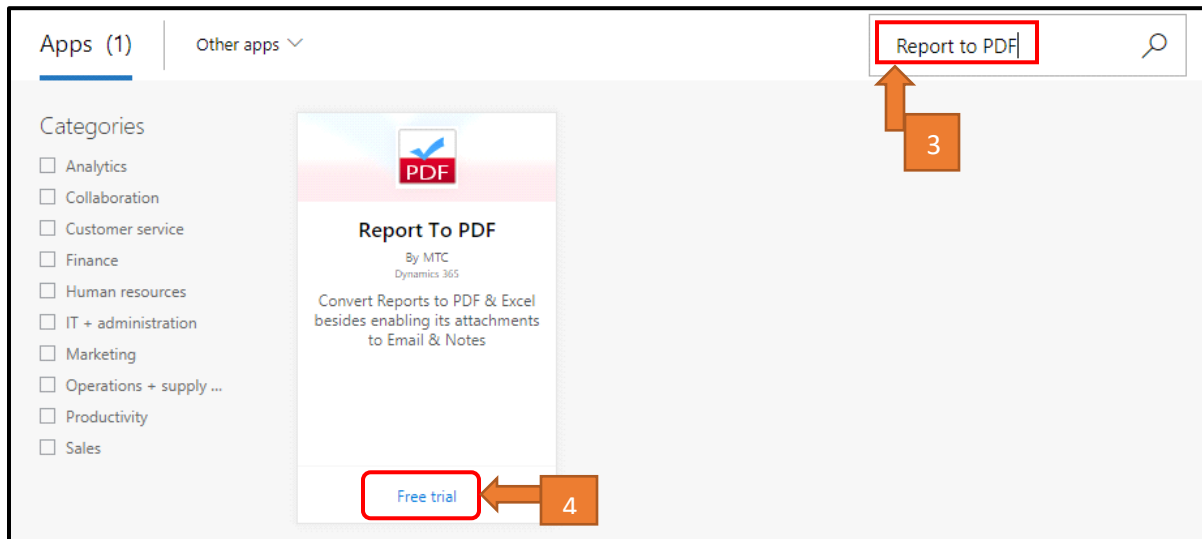
Step1:

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



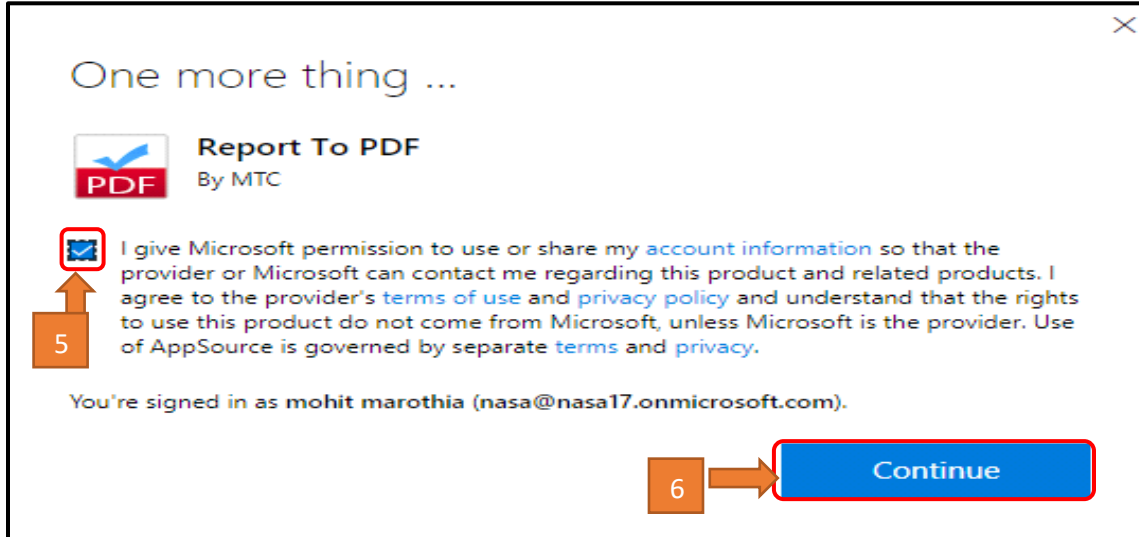
Step2:

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



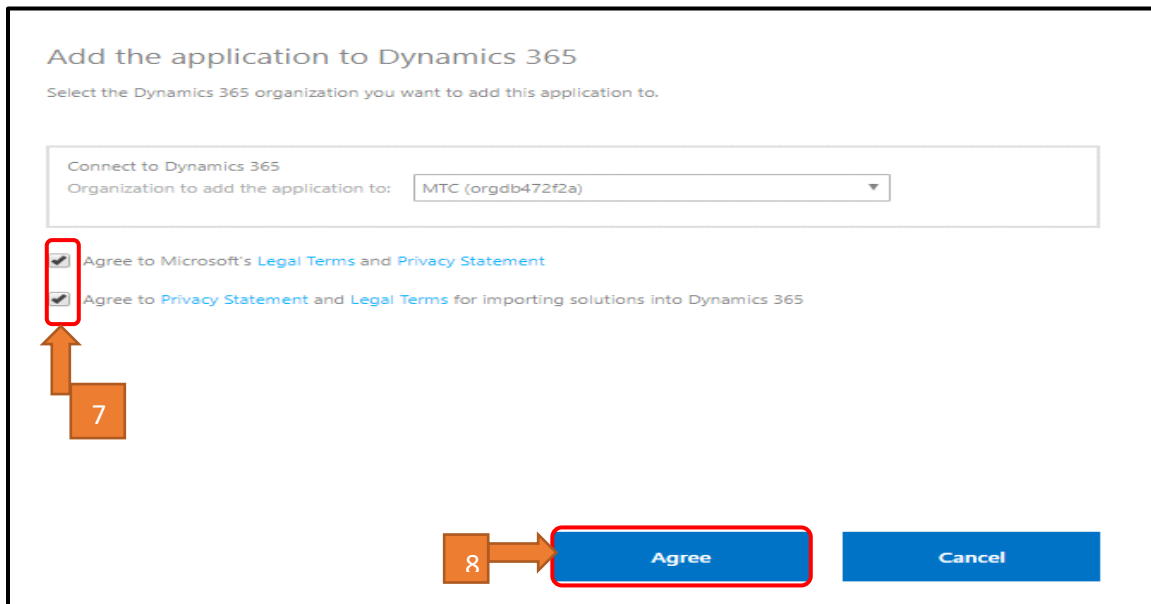
Step3:

- 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

First Name*	Harish	Last Name*	Kumar
Phone*	1234567892	Company*	MTC
Website*	www.mtccrm.com	Email*	marothiamohit.1998@gmail.
City*	hyderabad	State/Province*	telengana
Country*	india	Zip/Postal Code*	500050

10

Step8:

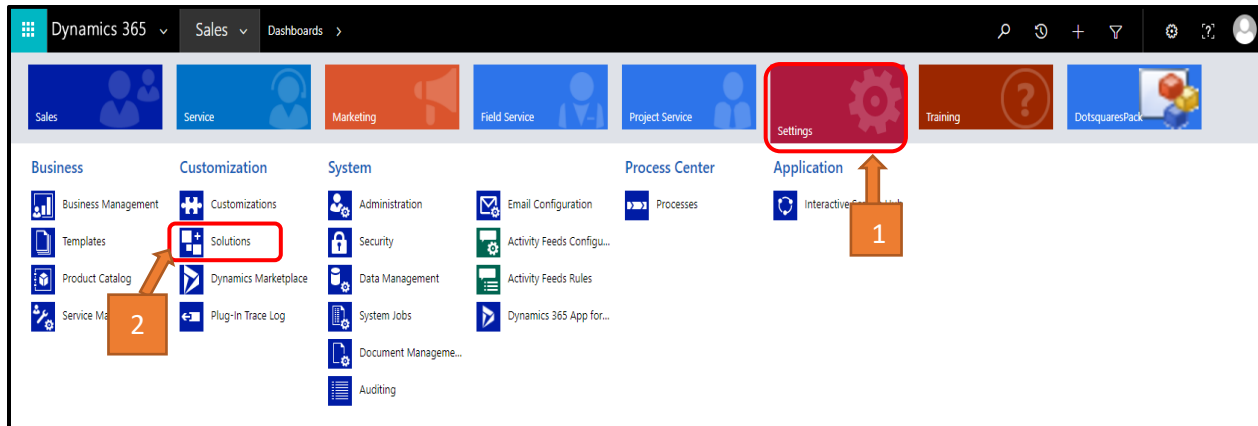
- After submitting the registered form, below you can get all the MTC products and you can find **Report to Pdf** as **Installed**.

CRMStarterPack				Purchase As Bundle	Update License
	Activity Calendar		Get it Now		
	Alerts		Installed	Purchase License	Update License
	CRM Picture		Get it Now		
	Auto Number		Get it Now		
	Note Pro		Get it Now		
	Report To PDF		Installed	Purchase License	Update License

Configuration Settings in Report to PDF

Step1:

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



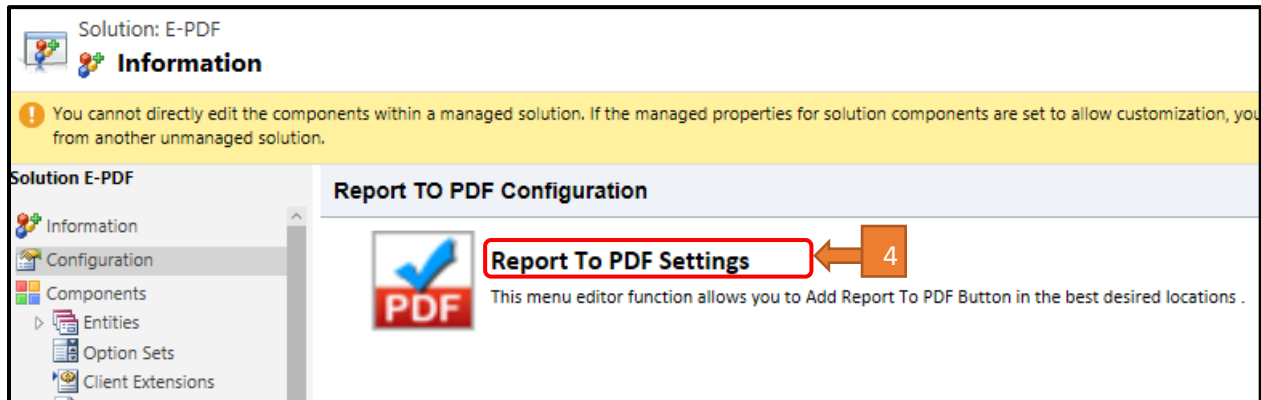
Step2:

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

EPDF	E-PDF	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

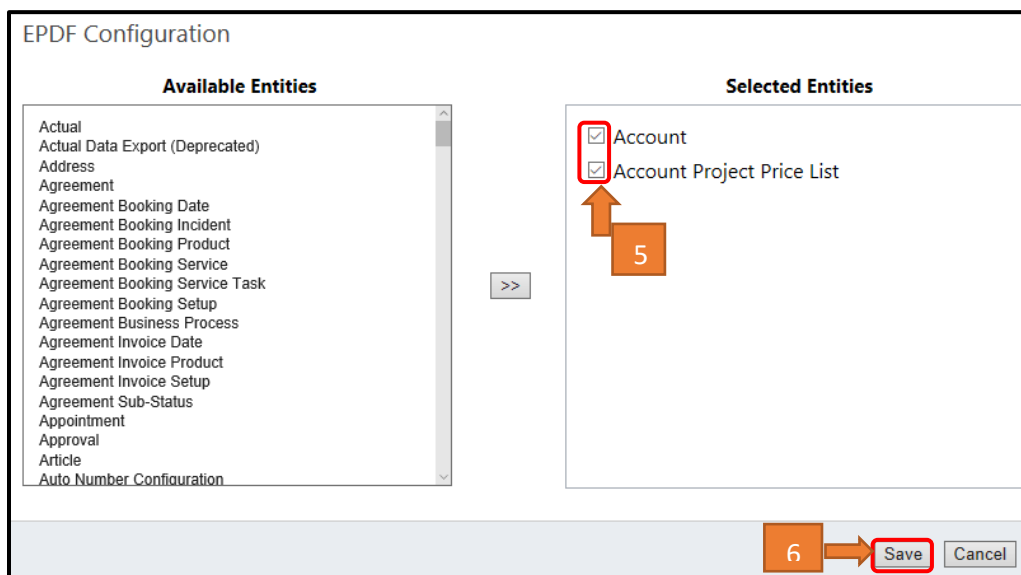
Step3:

- Click on **Report to PDF Settings**.



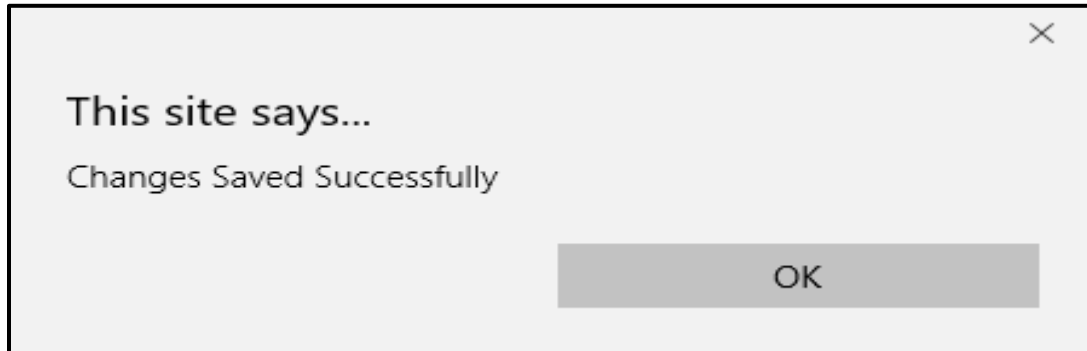
step4:

- 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:

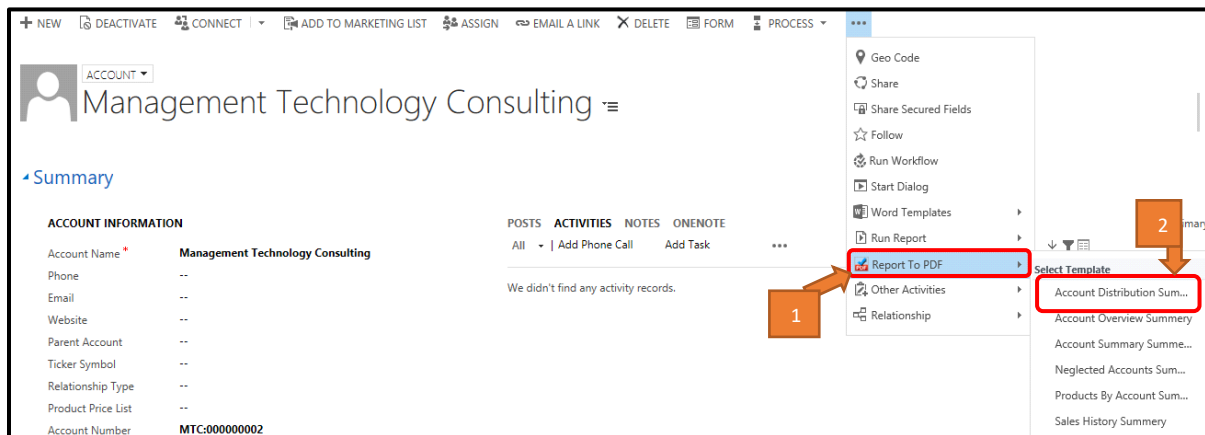
- After clicking on save button, Changes Saved Successfully popup message will be displayed. Click on OK.



Report to PDF Functionality

Step1:

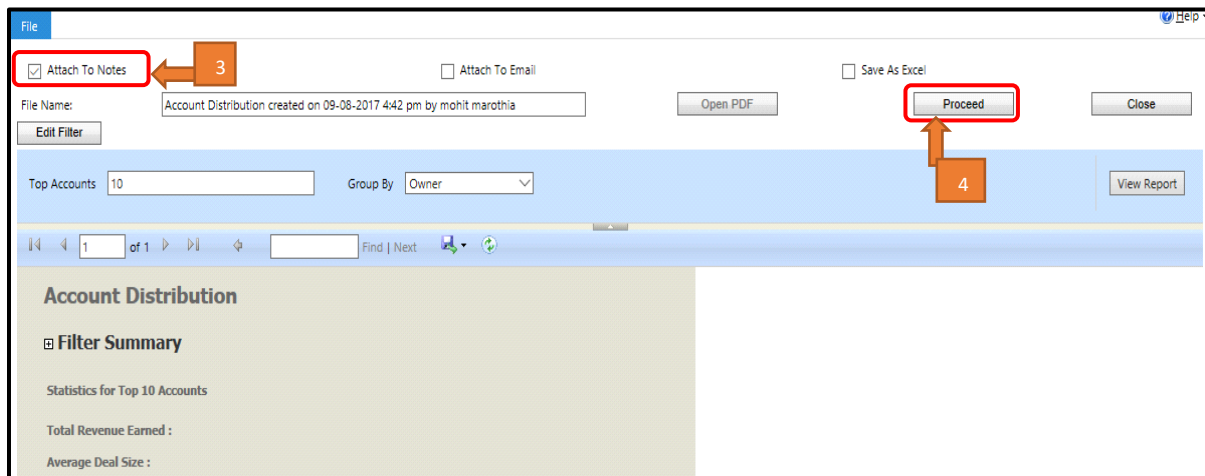
- Navigate to **Dynamic 365** and click on **Sales** and select **Accounts**.
- Create a **new Account record**. Click on **more** options and click on **Report to PDF**, and select any templates (refer image below) as for example let's find out how it's working on **Account Distribution Sum**.



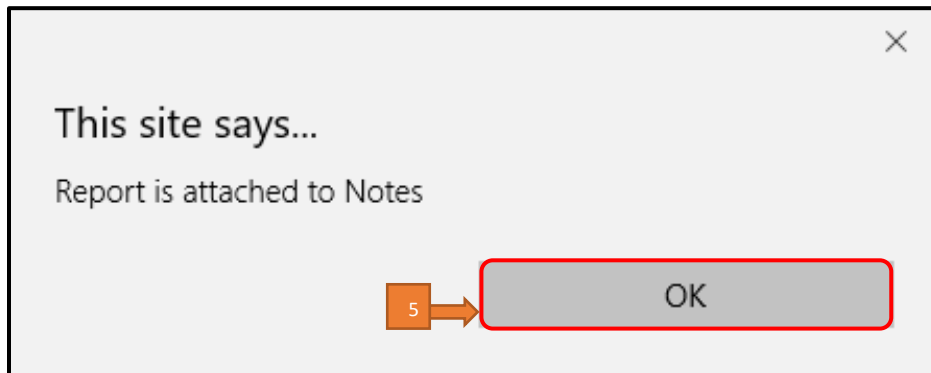
- You can **Attach to Notes**, **Attach to Email**, **save as Excel** and **open as PDF file** the Account Distribution Sum report.

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**.

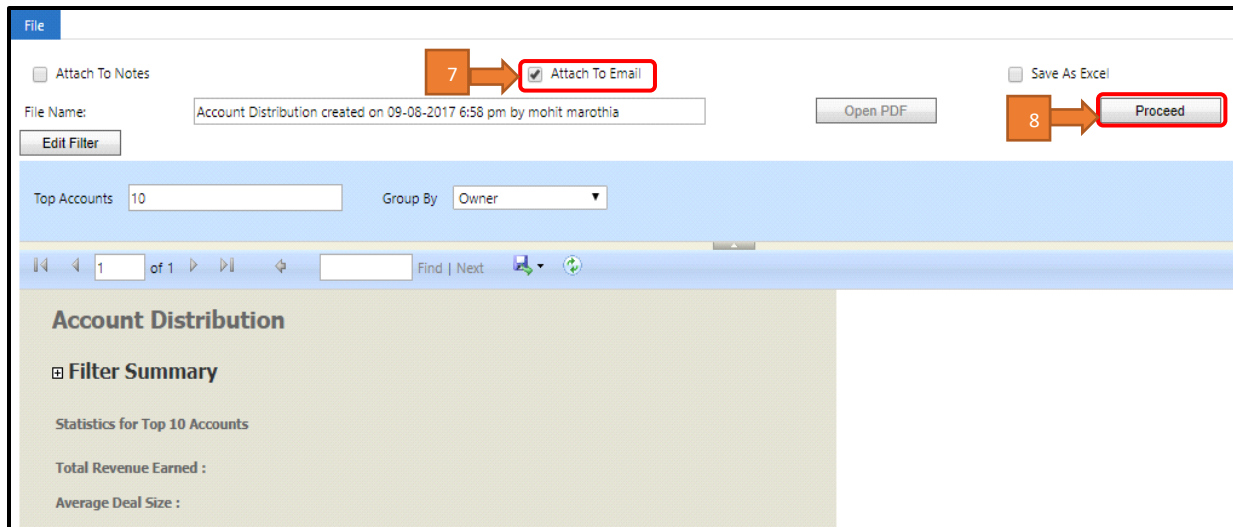


- The selected report will be attached as Notes. To know where it is saved click on the **NOTES** as shown in figure below.

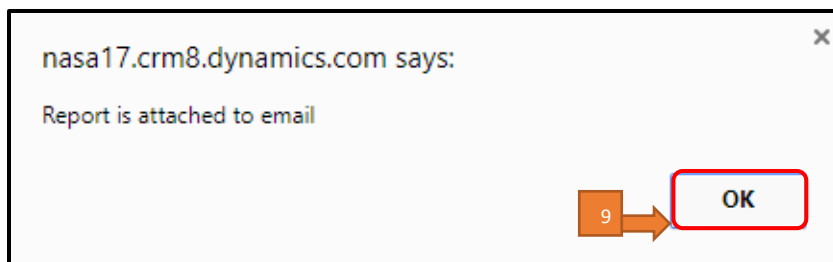


Attach To Email:

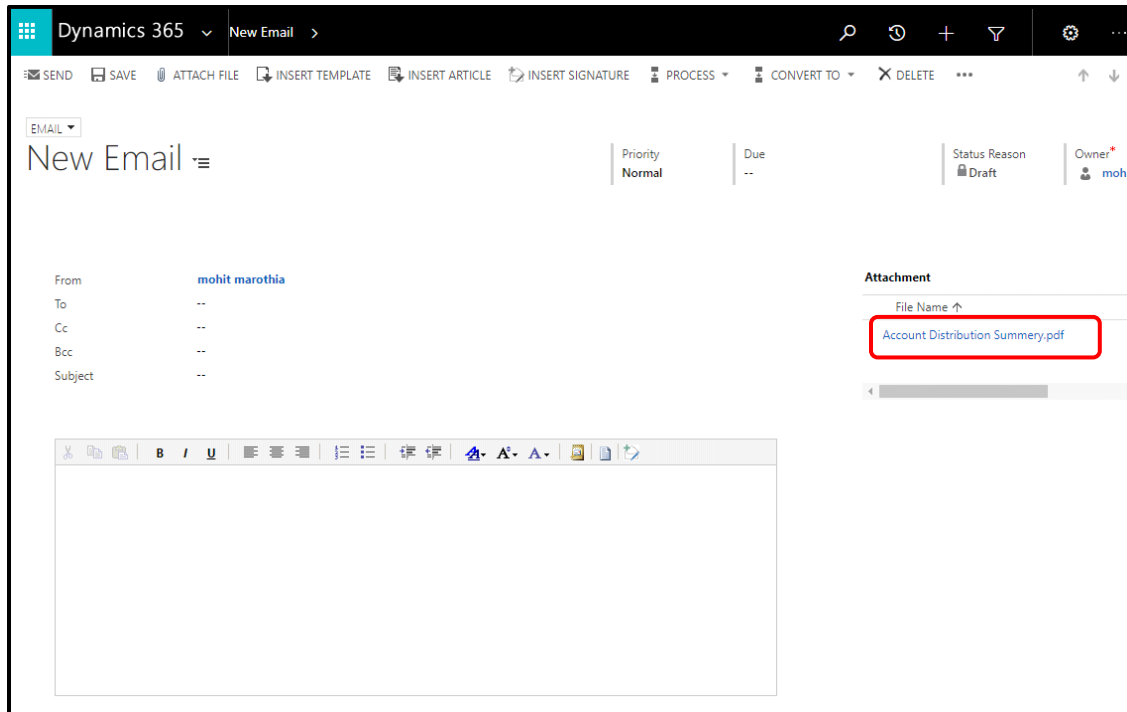
- Select the check box of **Attach to Email** and then click on **Proceed**. File name is auto generated.



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

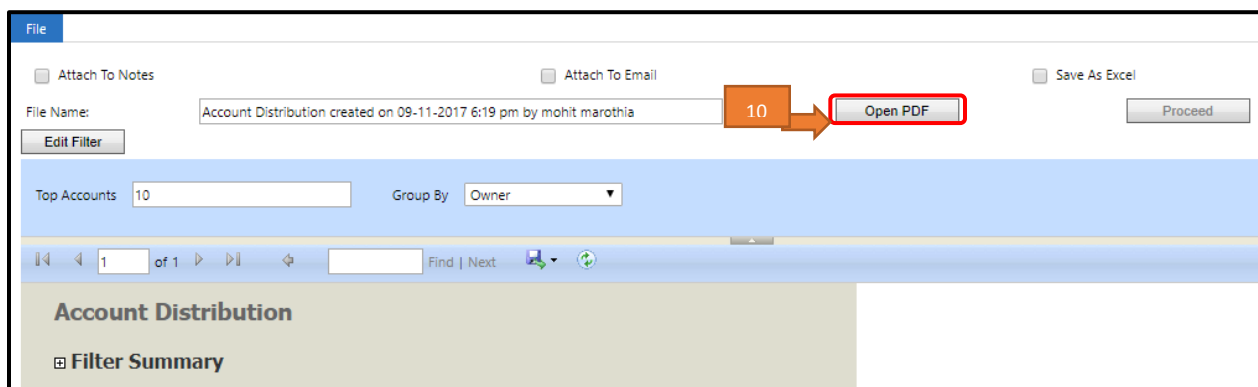


- A new window will open with Email and attachment details. In Attachments you can see the PDF file attached as **Account Distribution Summary.pdf** Attach to Email as shown below figure.
- You can send this email by clicking **Send** button in **CRM ribbon**.



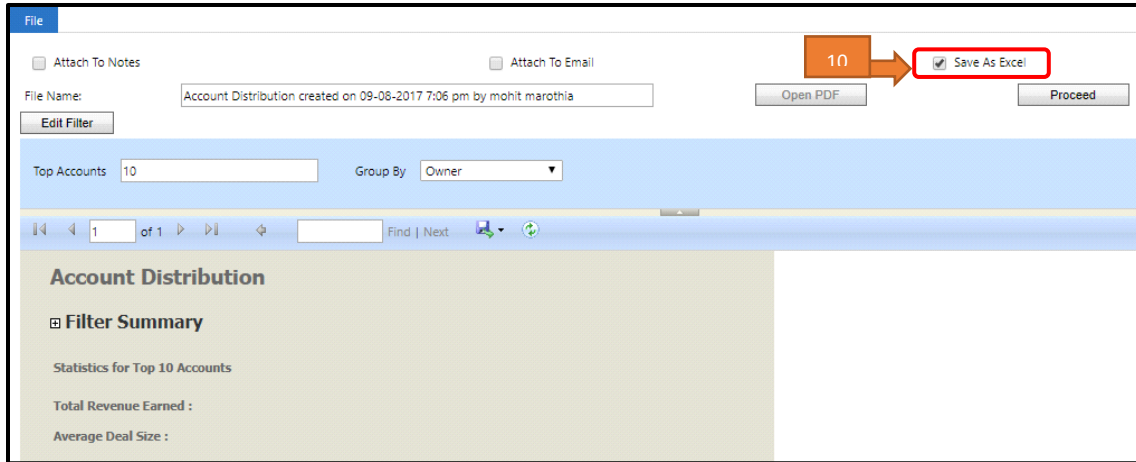
Open PDF:

- 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:

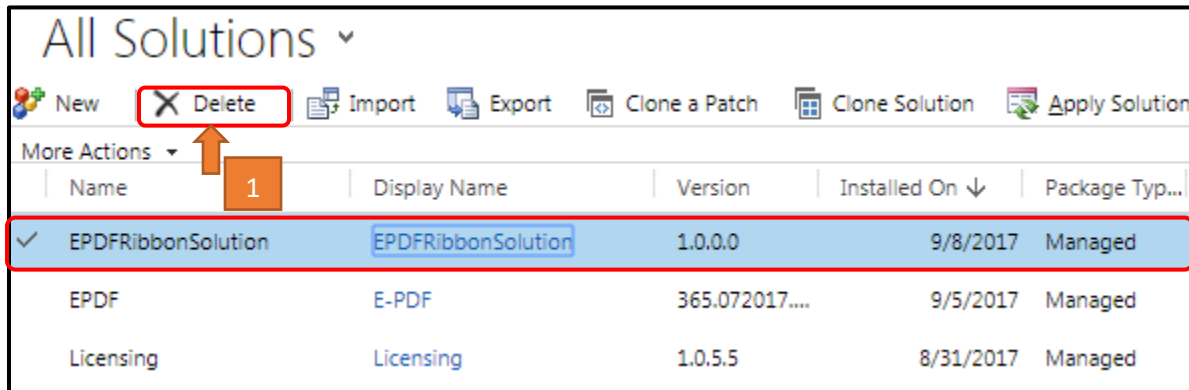
- Select the check box of **Save to Excel** and then click on Proceed. File name is auto generated.
- A new window will open with the downloaded **Excel sheet** and you can open that excel sheet from the new window



Uninstall Report to PDF

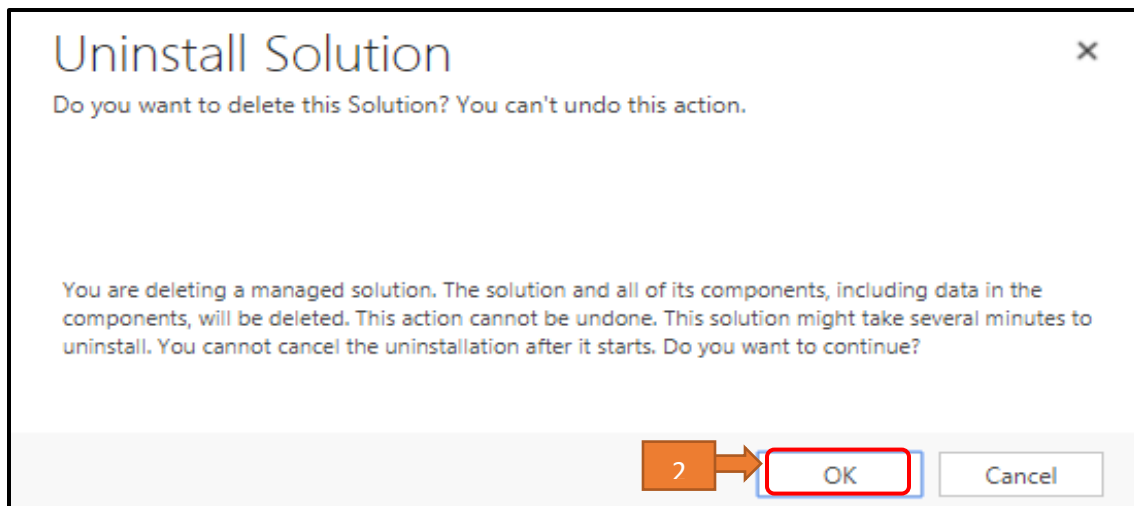
Step1:

- 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**.



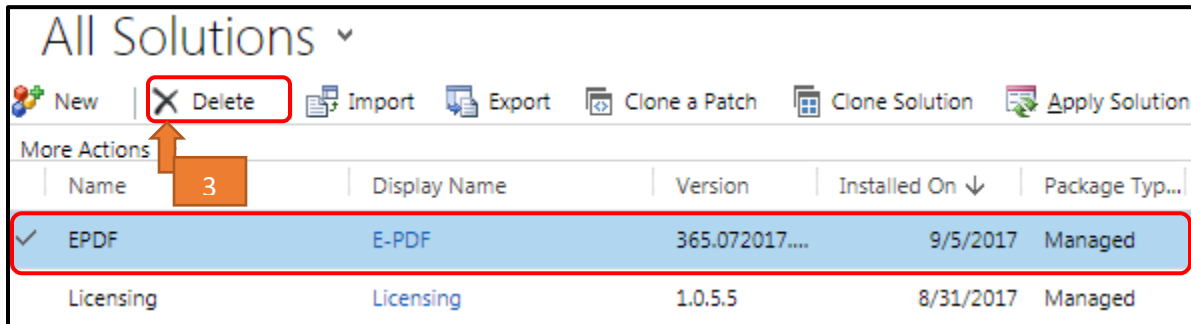
Step2:

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



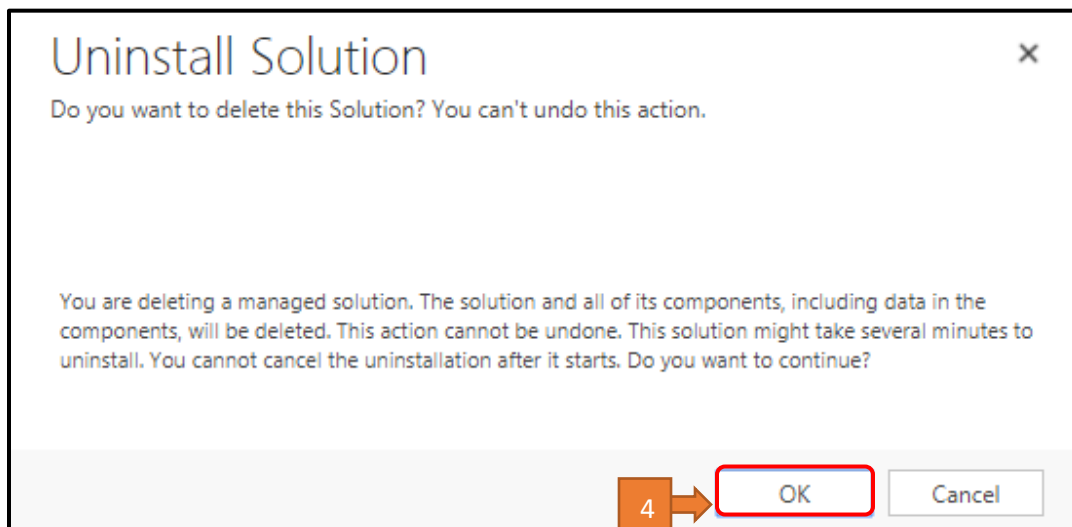
Step3:

- 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.

All Solutions ▾

New | Delete | Import | Export | Clone a Patch | Clone Solution | Apply Solution

More Actions ▾

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

Information | Configuration | Components

Entities | Option Sets | Client Extensions | Web Resources | Processes | Plug-in Assemblies | Sdk Message Processin... | Service Endpoints | Dashboards

Submit

Products	Expiry Date	No of Users	
CRMStarterPack			
Activity Calendar			Get it Now
Alerts			Get it Now
Note Pro			Get it Now
Report To PDF	9/20/2017	0	Get it Now
Auto Number			Get it Now
CRM Picture			Get it Now