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How to install Report to PDF Solution?

**Step 1:**

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

**Step 2:**

- In the search box, search for **Report to PDF by MTC** and click on **free trial**.
Step 3:

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

![One more thing ...]

Step 4:

- 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.

![Add the application to Dynamics 365]

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Step 5:

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

<table>
<thead>
<tr>
<th>Dynamics 365 Portals - Par...</th>
<th>8.3.0.215</th>
<th>1/1/2050</th>
<th>Not installed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dynamics 365 Sales Applic...</td>
<td>1.0.0.1</td>
<td>1/1/2050</td>
<td>Installed</td>
</tr>
<tr>
<td>E-PDF</td>
<td>365.72017.3.3</td>
<td>1/1/2050</td>
<td>Installation pending</td>
</tr>
<tr>
<td>Field Service</td>
<td>6.2.1.38</td>
<td>1/1/2050</td>
<td>Not installed</td>
</tr>
</tbody>
</table>

Step 6:

- 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**.
Step 7:

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

<table>
<thead>
<tr>
<th>ACCOUNT INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name*</td>
</tr>
<tr>
<td>Harish</td>
</tr>
<tr>
<td>Phone*</td>
</tr>
<tr>
<td>1234567892</td>
</tr>
<tr>
<td>Website*</td>
</tr>
<tr>
<td><a href="http://www.mtcscr.com">www.mtcscr.com</a></td>
</tr>
<tr>
<td>City*</td>
</tr>
<tr>
<td>hyderabad</td>
</tr>
<tr>
<td>Country*</td>
</tr>
<tr>
<td>india</td>
</tr>
</tbody>
</table>

Submit

Step 8:

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

<table>
<thead>
<tr>
<th>CRM Starter Pack</th>
<th></th>
<th>Purchase As Bundle</th>
<th>Update License</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Calendar</td>
<td></td>
<td>Get it Now</td>
<td></td>
</tr>
<tr>
<td>Alerts</td>
<td>Installed</td>
<td>Purchase License</td>
<td>Update License</td>
</tr>
<tr>
<td>CRM Picture</td>
<td></td>
<td>Get it Now</td>
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</tr>
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</tr>
<tr>
<td>Note Pro</td>
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<td>Get it Now</td>
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</tr>
<tr>
<td>Report To PDF</td>
<td>Installed</td>
<td>Purchase License</td>
<td>Update License</td>
</tr>
</tbody>
</table>
Configuration Settings in Report to PDF

**Step1:**
- Navigate to Dynamic 365 -> Settings and click on solutions.

![Diagram showing steps](image)

**Step2:**
- Click on E-PDF to start the process of configuration.
Step 3:

- Click on Report to PDF Settings.

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Step 4:

- 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.
Step 5:

- 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**.

![Image of Report to PDF steps](image)

- 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**.

![Image of window box displaying message](image)

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

![Image of notes section](image)
Attach To Email:

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

![Select Attach to Email](image1.png)

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

![Report attached to email](image2.png)

- 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

**Step 1:**
- 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.

![All Solutions Table]

**Step 2:**
- Click on OK to start uninstallation process of EPDFRibbonSolution.

![Uninstall Solution]

You are deleting a managed solution. The solution and all of its components, including data in the components, will be deleted. This action cannot be undone. This solution might take several minutes to uninstall. You cannot cancel the uninstallation after it starts. Do you want to continue?
Step 3:

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

![All Solutions](image)

Step 4:

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

![Uninstall Solution](image)
Step 5:

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

![All Solutions](image)

Step 6:

- 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](image)