



Click2Export



White Paper

CLICK2EXPORT

Aim:

Easily export any Dynamics 365 report/word/excel template with single click and attach it to an email, auto send Email with an attachment, attach as a note, upload to SharePoint or download it.

Features:

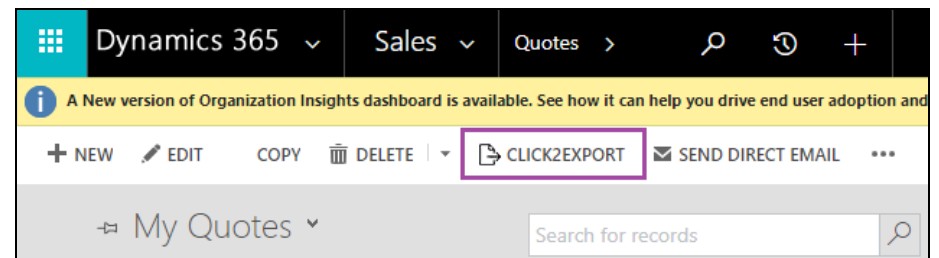
- ✓ One click export tool for Dynamics CRM Reports/Word/Excel Templates
- ✓ Multiple file formats supported – PDF, MS Word, MS Excel, CSV & TIFF format
- ✓ Support for Fetch based reports
- ✓ Multiple export options supported – Download File, Email Attachment, Auto send Email, attach as a note or upload on SharePoint
- ✓ Configure report parameters and filter criteria for reports
- ✓ Create multiple templates with different filter options and parameter values for the report
- ✓ Individual or Organizational report both can be exported
- ✓ Available to export the report for a single record or multiple records with one click
- ✓ Email templates can be specified in Default Email templates for generating the email for the Email option
- ✓ Easily upload the exported report file on SharePoint
- ✓ Automate the process of exporting the Dynamics 365 word template/report template with required action to be performed for selected entity record using Click2Export workflow
- ✓ SSRS/Word/Excel Template Automation/Scheduling for On-Premise & Online

Supported Versions:

Versions - Dynamics 365 8.2 & above, Power Apps & CDS.
Deployment Models - On-Premises and Online.
CRM Classic Web Client as well as UCI
Tablet Client

Ease of Access:

Click2Export button has been added to grid as well as form ribbon of all entities which are setup for export report functionality.



Configure Report Template

You need to setup report template for CRM reports/word/excel templates that you need to use with Click2Export functionality.
You can specify the default filters to be used by the report along with the default values for the parameters required by the report.

CLICK2EXPORT

Report Template

CRM REPORT TEMPLATE : INFORMATION

Quote ☰

General

Template Type	Report Template
Record Type *	quote
Template Name *	Quote
Export File Name *	Quote
Default File Format *	PDF

Excel Template

CRM REPORT TEMPLATE : INFORMATION

Opportunity-Pipeline Management ☰

General

Template Type	Excel Template
Record Type *	opportunity
Excel Template	Pipeline Management
Template Name *	Opportunity-Pipeline Management
Export File Name *	Pipeline Management
Default File Format *	Excel

Word Template

CRM REPORT TEMPLATE : INFORMATION

Quote-Quote Summary ☰

General

Template Type	Word Template
Record Type *	quote
Word Template	Quote Summary
Template Name *	Quote-Quote Summary
Export File Name *	Quote Summary
Default File Format *	PDF

Click2Export User Interface

Ability to export to **5 file formats** i.e. PDF, Word, Excel, CSV and TIFF for **Report** template, **2 file formats** i.e. PDF and MS Word for **Word** Template and Excel format for **Excel** template.

CLICK2EXPORT

Click2Export
One click tool to export the selected report to the requested format.

Report Section

Report Templates: Sample Click2Export Quo ▼

File Format: PDF ▼

Report Details: Report Name: Sample Click2Export Quote Report, Record Type: quote, Template Name: Sample Click2Export, Report Parameters

Action Section

Action

- Attach as a note**
Create a new note attachment of the exported template in the requested file format.
- Attach to a new email**
Create a new email and attach the exported template in the requested file format.
- Upload to sharepoint**
Upload the exported template on sharepoint in the requested file format.
- Download**
Download the exported template in the requested file format.

OK Close

Change Default Parameters at run time

Before exporting report, you have the ability to change parameter values. This helps to run and export the report to be emailed, note attach, upload to SharePoint or download with desired parameters from the user interface

Click2Export
One click tool to export the selected report to the requested format.

Report Section

Report Templates: Sample Click2Export Quo ▼

File Format: PDF ▼

Report Details: Report Name: Sample Click2Export Quote Report, Record Type: quote, Template Name: Sample Click2Export, Report Parameters

Actions supported

Click2Export
One click tool to export the selected report to the requested format.

Report Section

Report Templates: Sample Click2Export Quo ▼

File Format: PDF ▼

Report Details: Report Name: Sample Click2Export Quote Report, Record Type: quote, Template Name: Sample Click2Export, Report Parameters

Action Section

Action

- Attach as a note**
Create a new note attachment of the exported template in the requested file format.
- Attach to a new email**
Create a new email and attach the exported template in the requested file format.
- Upload to sharepoint**
Upload the exported template on sharepoint in the requested file format.
- Download**
Download the exported template in the requested file format.

OK Close

CLICK2EXPORT

Set file name convention of exported file

You can specify the naming convention of the file that would be exported to include entity field values like name of the record or any other field of that record.

Configure defaults for auto-sending emails

CRM REPORT TEMPLATE : INFORMATION
Opportunity-Pipeline Management

General

Template Type	Excel Template	Auto Send Email	<input checked="" type="checkbox"/>
Record Type *	opportunity	Default Email Template
Excel Template	Pipeline Management		
Template Name *	Opportunity-Pipeline Management		
Export File Name *	Pipeline Management		
Default File Format *	Excel		

Email Configuration

From: Me

To: Users

Cc: Team

Bcc:

Recipients: Sam P, ablestar

Attach Exported file as a Note to the record

The exported file in selected format will be attached to a note in the selected record itself with the help of the note option.

QUOTE: Laptop Quote

Total Amount: \$450.00

Effective From:

Effective To:

Owner: [User Icon]

Summary

Quote ID: QUO-01003-021117

Revision ID: 0

Name: Laptop Quote

Currency: US Dollar

Product Na...	Properties	Unit	Price Per U...	Quantity	Disc
Len Laptop			\$450.00	1.00000	

ACTIVITIES

Enter a note

Sample Click2Export Quote Report - Today 1:06 PM

Email Exported file

This option will allow you to provide the email template to be used in choose template option for composing the email. The email is generated with the exported file attached and will be saved as draft email in CRM. Also, Auto Send Email option is available where user would be able to automatically send the email with the attachment of exported file. Email Section is available to select the sender, receiver, CC and BCC.

EMAIL: You have been unsubscribed...

Priority: Normal

Due:

Status Reason: Draft

Owner: [User Icon]

From: [Redacted]

To: Samy P

Cc: Smith P

Bcc:

Subject: You have been unsubscribed...

Attachment

File Name: Sample Click2Export Quote Report.d... No

CLICK2EXPORT

Upload to SharePoint

This action will upload the exported template on configured SharePoint site in the requested file format.

QUOTE	Total Amo...	Effective Fr...	Effective To	Owner*
Laptop Quote	\$450.00	-----	-----	[User Icon]

Document Associated Grid

Name	Modified	Document Location	Path
Sample Click2Export Quote Report.pdf	10/3/2018 ...	[Redacted]	Laptop Quote

Download Report

This action will download the exported report in the requested file format

Create Workflow

Click2Export supports exporting Dynamics 365 CRM Reports/Word Templates with the workflow. This helps the user to automate the process of exporting Reports/Word Templates rather than clicking on Click2Export button every time.

General Administration Notes

Process Name: Click2Export Quote Template Workflow

Entity: Quote

Activate As: Process

Category: Workflow

Available to Run

- Run this workflow in the background (recommended)
- As an on-demand process
- As a child process

Workflow Job Retention

- Automatically delete completed workflow jobs (to save disk space)

Options for Automatic Processes

Scope: Organization

Start when:

- Record is created
- Record status changes
- Record is assigned
- Record fields change
- Record is deleted

Workflow gets triggered based on the options:

1. On Demand
2. On the change of various automatic processes e.g. Record status changes.

The user can select the required action i.e Attach as a Notes, Attach as an Email or Upload to SharePoint to run the of workflow after exporting the Dynamics CRM Reports/Word Templates.

Word Template

Process: Click2Export Quote Template Workflow

Working on solution: Default Solution

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Document Template	Lookup	Required	Quote Summary
CRM Report Template	Lookup	Required	Quote-Quote Summary
Attach as a Notes	Two Options	Optional	<input type="radio"/> False <input type="radio"/> True
Attach to an Email	Two Options	Optional	<input type="radio"/> False <input type="radio"/> True
Upload to SharePoint	Two Options	Optional	<input type="radio"/> False <input type="radio"/> True

Form Assistant

Dynamic Values

Operator:

Set to: [Dropdown]

Look for: Quote

Add

Report Template

Process: Click2Export Quote Report Workflow

Working on solution: Default Solution

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Click2Export Report Template	Lookup	Required	Quote
Attach as a Notes	Two Options	Optional	<input type="radio"/> False <input type="radio"/> True
Attach to an Email	Two Options	Optional	<input type="radio"/> False <input type="radio"/> True
Upload to SharePoint	Two Options	Optional	<input type="radio"/> False <input type="radio"/> True

Form Assistant

Dynamic Values

Operator:

Set to: [Dropdown]

Look for: Quote

Add

Schedule Reports

Set schedule to export and auto send Reports/Word/Excel Templates as email attachments at regular intervals.

The screenshot shows the 'SCHEDULE REPORTS' section with the title 'New Schedule Reports'. At the top right, there is a 'Run as' dropdown menu. Below the title, there are three tabs: 'General', 'Send Notification', and 'Schedule Report Status'. The 'General' tab is active and contains two sections: 'General' and 'Schedule Details'. The 'General' section has two input fields: 'Name' and 'CRM Report Template', both with red asterisks and dropdown menus. The 'Schedule Details' section has three input fields: 'Occurrence Pattern', 'Start Time', and 'Interval', all with red asterisks and dropdown menus. The 'Start Time' field also includes a calendar icon and a clock icon. The 'End by' field is partially visible and includes a calendar icon and a clock icon. A mouse cursor is visible at the bottom right corner of the form area.

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