

CLICK2EXPORT



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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:

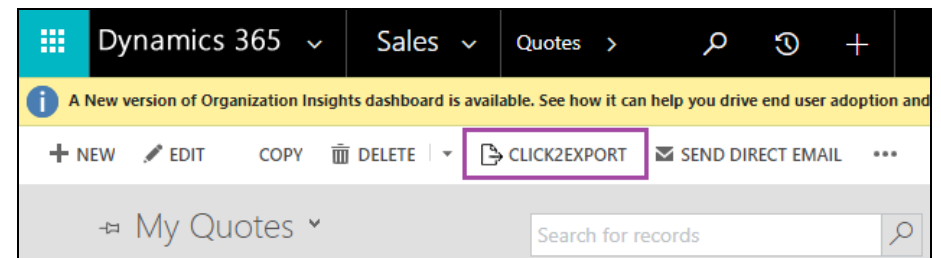
- ✓ One click export tool for Dynamics CRM Reports/Word/Excel Templates
- ✓ Multiple file formats supported – PDF, MS Word, MS Excel, CSV & TIFF format
- ✓ Support for Fetch based reports
- ✓ Multiple export options supported – Download File, Email Attachment, Auto send Email, attach as a note or upload 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 CRM 2013 & above, Microsoft Dynamics 365
Deployment Models - On-Premises, Online and Partner Hosted
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.

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[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.

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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

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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	Sam P
Cc:	Team	ablestar
Bcc:		

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:

Summary

Quote ID: QUO-01003-0211111
Revision ID: 0
Name: Laptop Quote
Currency: US Dollar

Product No...	Properties	Unit	Price Per U...	Quantity	Disc
Len Laptop			\$450.00	1.00000	

ACTIVITIES

NOTE

Enter a note

Sample Click2Export Quote Report
Sample Click2Export Quote Repr
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:

From:

To: Samy P

Cc: Smith P

Bcc:

Subject: You have been unsubscribed...

Attachment

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

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Upload to SharePoint

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

The screenshot shows a Dynamics CRM interface for a quote. At the top, there's a header with 'QUOTE' and a dropdown menu. Below it, a 'Document Associated Grid' is visible with a search bar. A table below the grid shows a document named 'Sample Click2Export Quote Report.pdf' with a date of '10/3/2018 ...' and a location of 'Laptop Quote'. The table has columns for Name, Modified, Document Location, and Path.

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.

The screenshot shows the 'Click2Export Quote Template Workflow' configuration screen. It has tabs for 'General', 'Administration', and 'Notes'. Under 'Hide Process Properties', there are fields for 'Process Name' (Click2Export Quote Template Workflow), 'Entity' (Quote), and 'Activate As' (Process). There are also checkboxes for 'Available to Run' (Run in background, on-demand, or as a child process) and 'Workflow Job Retention' (Automatically delete completed workflow jobs). Under 'Options for Automatic Processes', there are checkboxes for 'Start when' (Record is created, Record status changes, Record is assigned, Record fields change, Record is deleted) and a 'Select' button.

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

The screenshot shows the 'Click2Export Quote Template Workflow' configuration screen for a Word Template. It has a table for 'Set Custom Step Input Properties' with columns for Property Name, Data Type, Required, and Value. The table has rows for Document Template, CRM Report Template, Attach as a Notes, Attach to an Email, and Upload to SharePoint. The 'Form Assistant' panel on the right shows 'Dynamic Values' and 'Operator' options.

Report Template

The screenshot shows the 'Click2Export Quote Report Workflow' configuration screen for a Report Template. It has a table for 'Set Custom Step Input Properties' with columns for Property Name, Data Type, Required, and Value. The table has rows for Click2Export Report Template, Attach as a Notes, Attach to an Email, and Upload to SharePoint. The 'Form Assistant' panel on the right shows 'Dynamic Values' and 'Operator' options.

Schedule Reports

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

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The screenshot shows a web form titled "SCHEDULE REPORTS" with a sub-header "New Schedule Reports". In the top right corner, there is a "Run as" dropdown menu. Below the header, there are three tabs: "General" (selected), "Send Notification", and "Schedule Report Status". The form is divided into two main sections: "General" and "Schedule Details".

General Section:

- Name: [Redacted]
- CRM Report Template: [Redacted]

Schedule Details Section:

- Occurrence Pattern: [Redacted]
- Start Time: [Redacted] [Calendar icon] [Clock icon]
- End by: [Redacted] [Calendar icon] [Clock icon]
- Interval: [Redacted]

Contact Us:

INOIGIC (MUMBAI - INDIA)

M/S. INOIGIC TECH (INDIA) PVT. LTD.
A/301, Everest Nivara InfoTech Park,
TTC Industrial Area, MIDC, Turbhe
Navi Mumbai, Maharashtra 400705
INDIA

E-mail: crm@inogic.com
Skype: crm@inogic.com
Twitter: @inogic