**GetPDF** Solution



# **GetPDF Solution**

#### **Overview of the GetPDF Solution:**

The GetPDF solution extends the default functionality provided by Microsoft in D365 Customer Engagement of exporting pdf document in quote to all entities (system and custom entities). Currently it only support System word templates.



The solution is intended to save time to customers and users who use word templates and want to send these documents to customers as PDF. In two clicks, the PDF document will be generated, downloaded based on the word document template and available to the users. Then the users can choose either to send them in email or print the document.

# Screenshots and usage:

The GetPDF button will be available in all the entities once the solution is installed. The user needs to click on the GetPDF button.

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ACCOUNT INFORMATION Account Name * Adventure Works	Timeline + ···	Relationship Assistant
Phone +27-264-1234567 %	EARLIER THIS MONTH	
Fax         27-264-555-7875           Website         http://www.adventure-w         ①	Phone Call from Veronica Quek (Sample Data) - Saturday, September 28, 2019 9:41 PM	Primary Contact
Parent Account	Discussed Options Discussed Options	☐ Email Adrian@adventure-works.com
Ticker Symbol ADWKS	A, Assign 🛛 🖺 Add to Queue 🛛 …	🛆 Business
Relationship Type	Phone Call from Christa Geller (Sample Data) - Saturday, September 28,	768-555-0156
Product Price List	Discussed 3D Printing options and finalized product and accessory list.	CONTACTS

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A new window will popup with the templates displayed:

DisplayTemplates.html - Mic	crosoft Dynamics 365 - Google Chrome
pramitimg1.crm.dynam	nics.com/main.aspx?appid=0b50de68-f3e1-e911-aa30-000d3a3abdb6&page
Select a Templat	te to download as PDF Document
•	1
Account Summary	The specific system word templates are loaded
- 11000 and 5 annually	based on the entity. In this Eg: Account template
Download PDF 2	

The user can choose the appropriate template as shown above and click on Download PDF. The selected template file will be downloaded in PDF format as shown below.

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pramitimg1.crm.dynamics.com/main.aspx?appid=0b50de68-f3e1-e911-aa30-000d3a3abdb6&paget

# Select a Template to download as PDF Document

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Download PDF
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template
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DESCRIPTION:       Adventure Works is one of the biggest bicycle manufacturers in the world. We continually are looking for better ways to build faster and better bikes for our customers. All of our bikes are designed and built by fellow bicyclists. As a global manufacturer of bikes we're always looking to improve and create the most innovative biking products in the world.       PRIMARY CONTACT:         OTHER CONTACTS       Description       Primary of bikes we're always looking to improve and create the most innovative biking products in the world.       Primary of bikes we're always looking to improve and create the most innovative biking products in the world.         DTHER CONTACTS       EMAL       Adrian@adventure.work.com         Recent OPPORTUNITIES       RECENT OPPORTUNITIES										Adven http://w Phone: 11111 W Johanne South Af	ture Wo ww.adver -27-264-1 illiam Nic sburg, , 21 rica	orks nture-wo .234567 ol Drive 100	orks.com	I	INDU	AI	ACC NNUAL REVENUE NO. 1 F	S450,000,000. MPLOYEES: 5,80 ARENT ACCOUN TICKER: ADWI CHANDISE RETA SIC COD	<b>T</b> 20 20 7: (S 11 E:
OTHER CONTACTS  FUL NAME FUL NAME Adrian Dumitrascu Adrian@adventure-works.com Ryan Gregg ryang@adventure-works.com RECENT OPPORTUNITIES							DE: Adr loo bik des ma imp pro	SCRIPTIC renture N hufactur king for l es for ou igned an hufactur rove and ducts in	DN: Works is ers in th better w r custon d built b er of bik d create the wor	one of the e world. W vays to buil ners. All of py fellow bi ces we're al the most i Id.	biggest b e continu I faster ar our bikes cyclists. A ways look nnovative	icycle ally are nd bette are is a globa sing to biking	PF Ac r	RIMAR) drian Du	<b>/ CONTA</b> umitrascu	<b>CT:</b>			
Adrian Dumitrascu Adrian@adventure-works.com Ryan Greg ryang@adventure-works.com RECENT OPPORTUNITIES							<b>OT</b>		ITACTS				EN	MAIL				_	
Ryan Gregg ryang@adventure-works.com RECENT OPPORTUNITIES							Ad	ian Dumitr	ascu				Ad	drian@adv	enture-wor	ks.com			
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Account	Northwind Traders	EARLIER THIS MONTH
Purchase Timeframe	This Quarter	Auto-post on wall Expressed interes
Currency	*   US Dollar	Competitor: Consolidated Messenge
Budget Amount	\$500,000.00	⊖ Like 5 Reply ····
Purchase Process	Unknown	Auto-nost on wall Expressed interes
Description	Alex has demonstrated that	Saturday, September 28, 2019 9:42 P

# Couple of more screenshots from other entities:

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DisplayTemplates.html - Microsoft Dynamics 365 - Google Chrome	

pramitimg1.crm.dynamics.com/main.aspx?appid=0b50de68-f3e1-e911-aa30-000d3a3abdb6&pagetype=webresource&

#### Select a Template to download as PDF Document

Opportunity Summary	The specific system word templates are load on the entity. In this Eg: Opportunity templa	ed based tes
Download PDF 2		
Deportunity Summary.pdf - Adobe Reader		
	☑   ● ● 1 / 2   ● ● 100% ▼   H №	₽
C/	COMPANY	
Opportunity Summary PDF	Northwind Traders	OPPORTUNITY
		STATUS: IN PROGRESS OWNER: VERONICA QUEK (SAMPLE DATA)
		EST.CLOSE DATE: 09/2017 EST.REVENT: 510.568/000.00 BUDGET: 5500.000.00 PURCHASE INFORME: THIS QUARTER PURCHASE PROCESS. UNKNOWN
	Expressed interest in A. Datum X line of	printers
	DESCRIPTION: Alex has demonstrated that NWT is interested in purchasing the some 3D Printers.	PRIMARY CONTACT: Alex Wu
	CURRENT SITUATION: Northwind Traders, Inc. maintains stores all over the United States selling novelty items; interested in	
	specializing in the printer industry due to high selling volume. CUSTOMER NEED Would like to expand their inventory of quality 3D Printers to focus more primarily in the modeling industry.	

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## Future developments:

We are considering the email functionality to be provided as additional functionality, so that on click of button and selection of word template: a PDF document is generated, email created with the PDF attached and opened with the user having the option to either send or save the email without sending.

## **Dependencies:**

The GetPDF solution is dependent on the internal pdf document generation functionality provided by Microsoft. Hence Pramitisoft does not guarantee that the solution will continue to work, in case the Microsoft deprecates the feature in future releases.

#### Known Issues:

The button does not get removed completely when the solution is un-installed. This is a known Microsoft bug reported <u>here</u>.

Workaround:

- Export any unmanaged solution with Application ribbons added to it.
- Open customizations.xml
- Find the button/flyout you want to hide. (In our case the button is "ps.ApplicationRibbon.{!EntityLogicalName}.GetPDFButton.GetPDF")

Instead of removing the button/flyout, go to the definition of the command for the button/flyout

• In the command definition, under Enable Rules, add

<EnableRule Id="Mscrm.Disabled" />

Ref for the workaround is provided <u>here</u>.

Please feel free to reach out to us in case of any queries and issues: info@pramitisoft.in

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