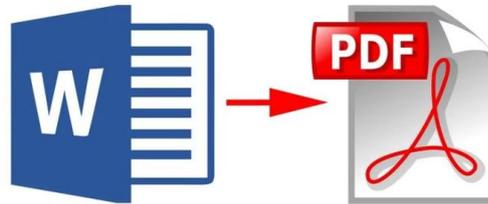


GetPDF Solution

Overview of the GetPDF Solution:

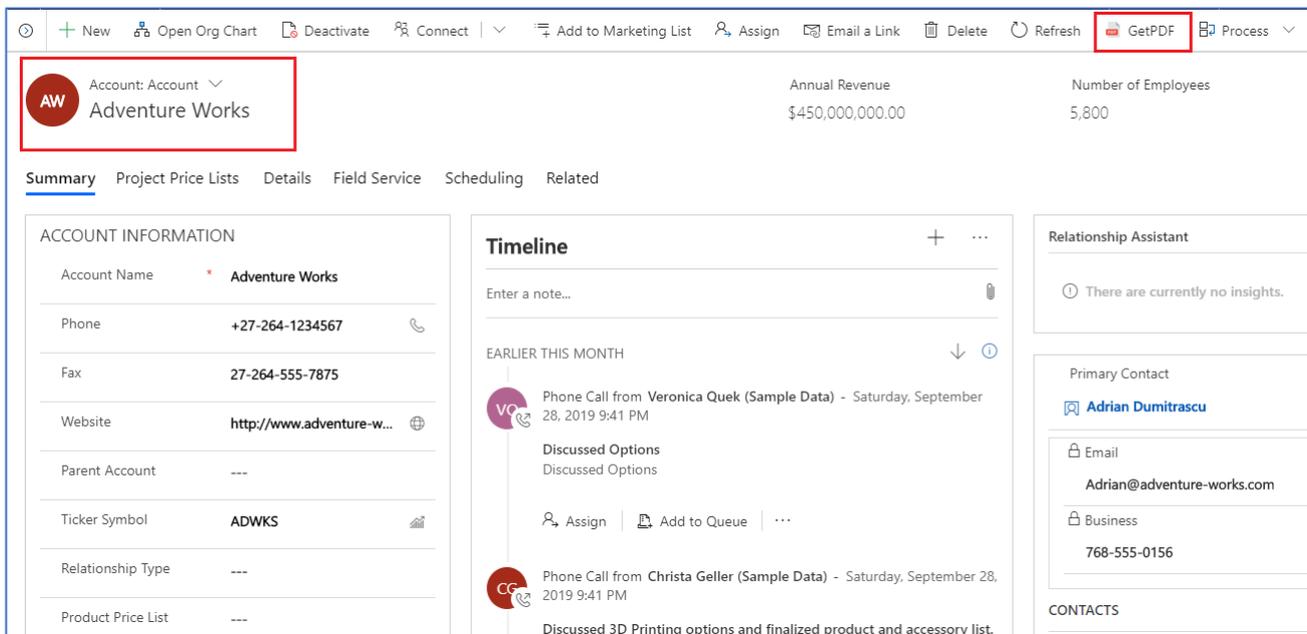
The GetPDF solution extends the default functionality provided by Microsoft in D365 Customer Engagement of exporting pdf document in quote to all entities (system and custom entities). Currently it only support System word templates.



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:

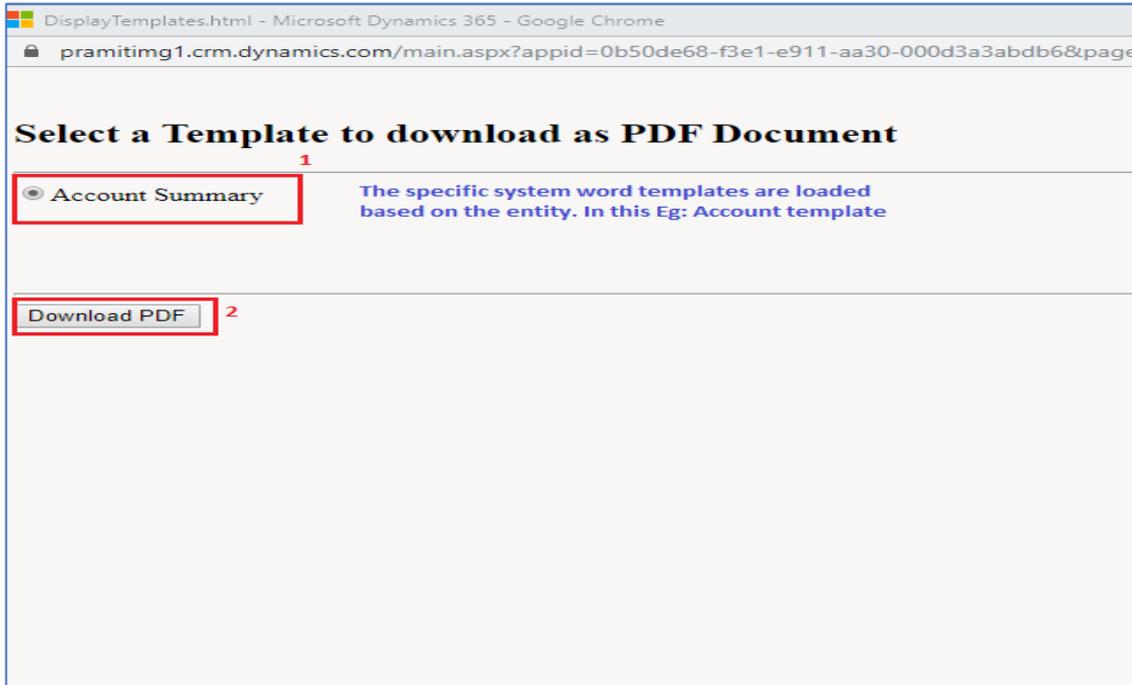
The GetPDF button will be available in all the entities once the solution is installed. The user needs to click on the GetPDF button.



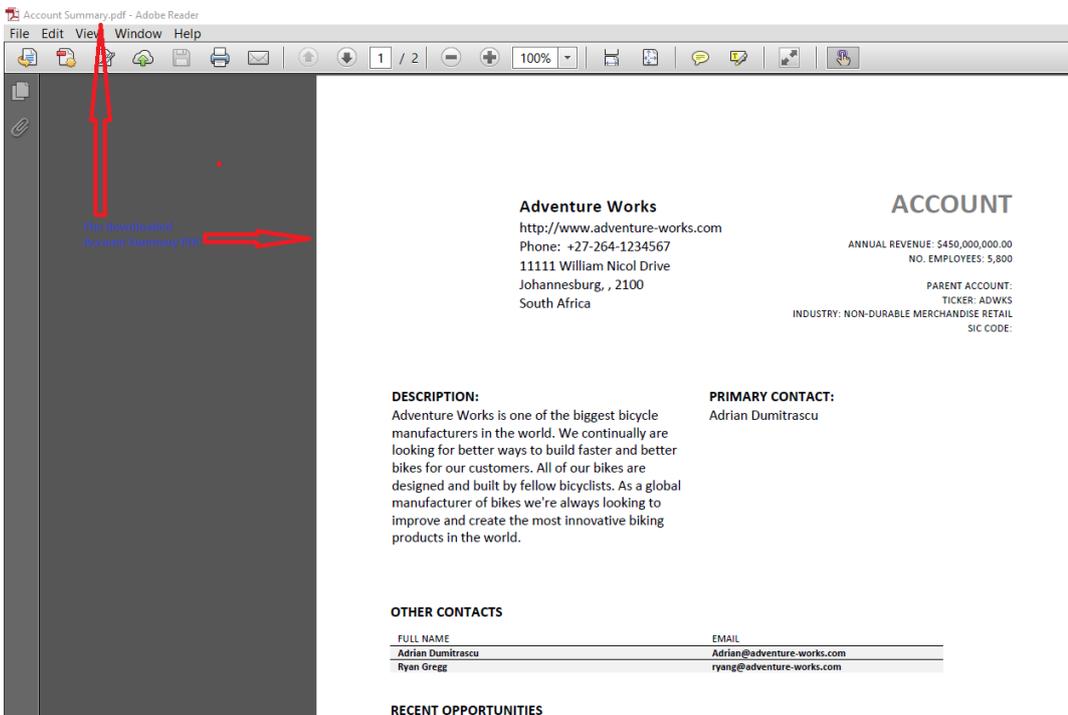
The screenshot displays the Microsoft Dynamics 365 interface for an account named "Adventure Works". The top navigation bar includes a "GetPDF" button, which is highlighted with a red box. The account details section shows the account name "Adventure Works" (also highlighted with a red box), along with "Annual Revenue" of \$450,000,000.00 and "Number of Employees" of 5,800. The "Summary" tab is active, displaying account information, a timeline of recent calls, and contact details for Adrian Dumitrascu.

Field	Value
Account Name	Adventure Works
Phone	+27-264-1234567
Fax	27-264-555-7875
Website	http://www.adventure-w...
Parent Account	---
Ticker Symbol	ADWKS
Relationship Type	---
Product Price List	---
Annual Revenue	\$450,000,000.00
Number of Employees	5,800

A new window will popup with the templates displayed:



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.



Couple of more screenshots from other entities:

🕒 + New 🔄 Refresh **📄 GetPDF** 📄 Close as Won 🚫 Close as Lost 📊 Recalculate Opportunity

📄 Opportunity: Opportunity ▾
Expressed interest in A. Datum X lin...

Opportunity Sales Process
Active for 26 days

Qualify Develop

Summary Product line items Quotes Field Service Related

Topic	* Expressed interest in A. Datu...
Contact	Alex Wu
Account	Northwind Traders
Purchase Timeframe	This Quarter
Currency	* US Dollar
Budget Amount	\$500,000.00
Purchase Process	Unknown
Description	Alex has demonstrated that

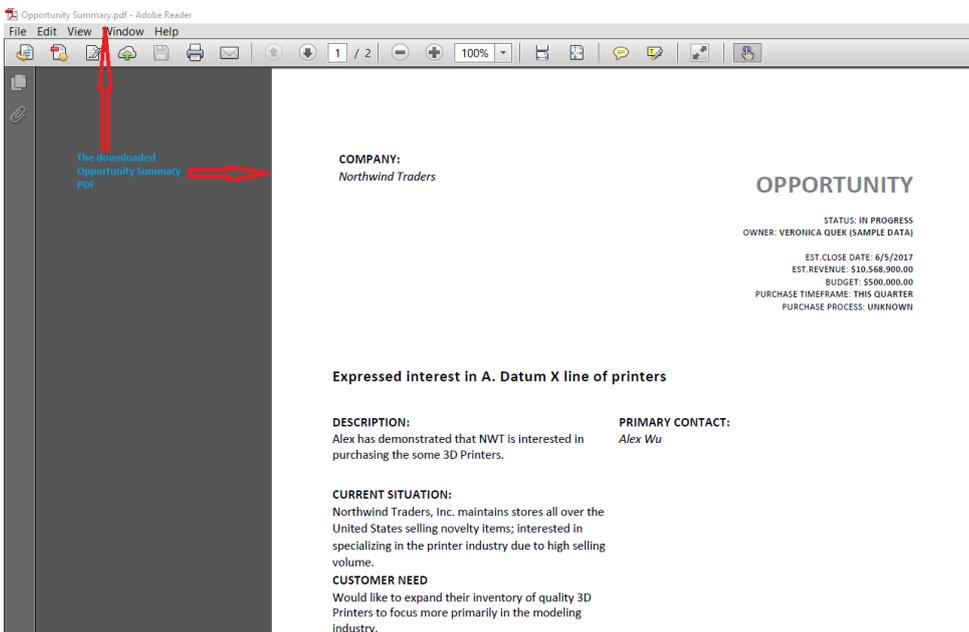
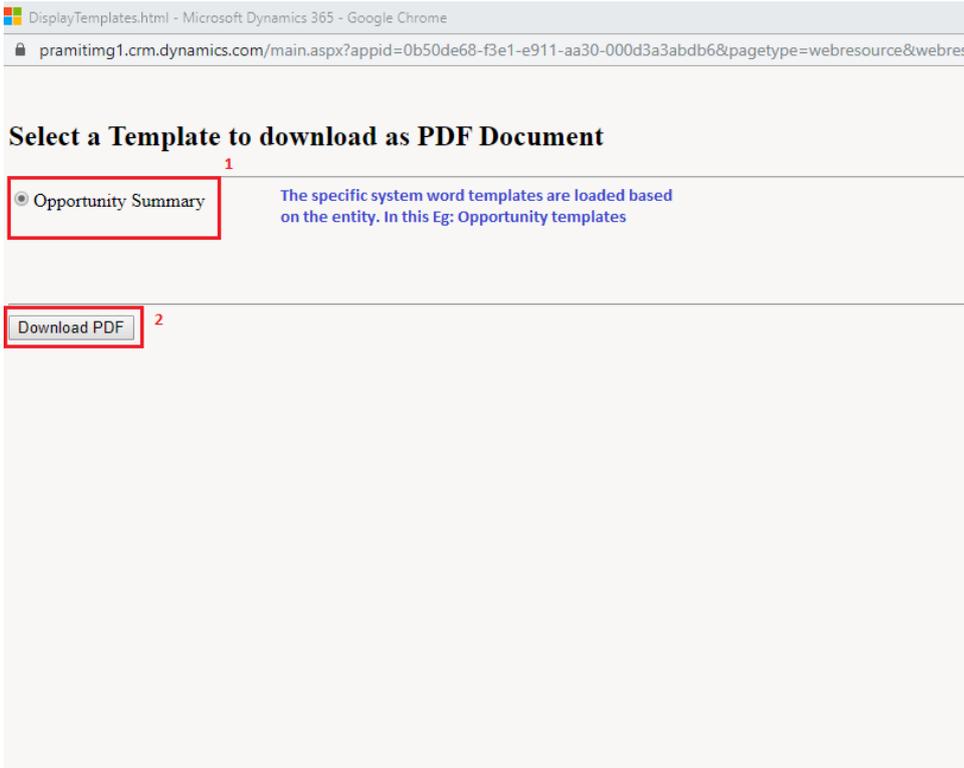
📄 Open

Timeline

Enter a note...

EARLIER THIS MONTH

- Auto-post on wall Expressed interes: Saturday, September 28, 2019 9:42 P
Competitor: Consolidated Message
👍 Like | ↩ Reply | ⋮
- Auto-post on wall Expressed interes: Saturday, September 28, 2019 9:42 P



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 [here](#).

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 [here](#).

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