

SLERT Dynamics 365 Menu version User Manual

Edition 2.0

(Sourcelink Excel Reporting Tool)



Sourcelink Inc.

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Edition 2.0 May 9, 2019

Index, Revision history

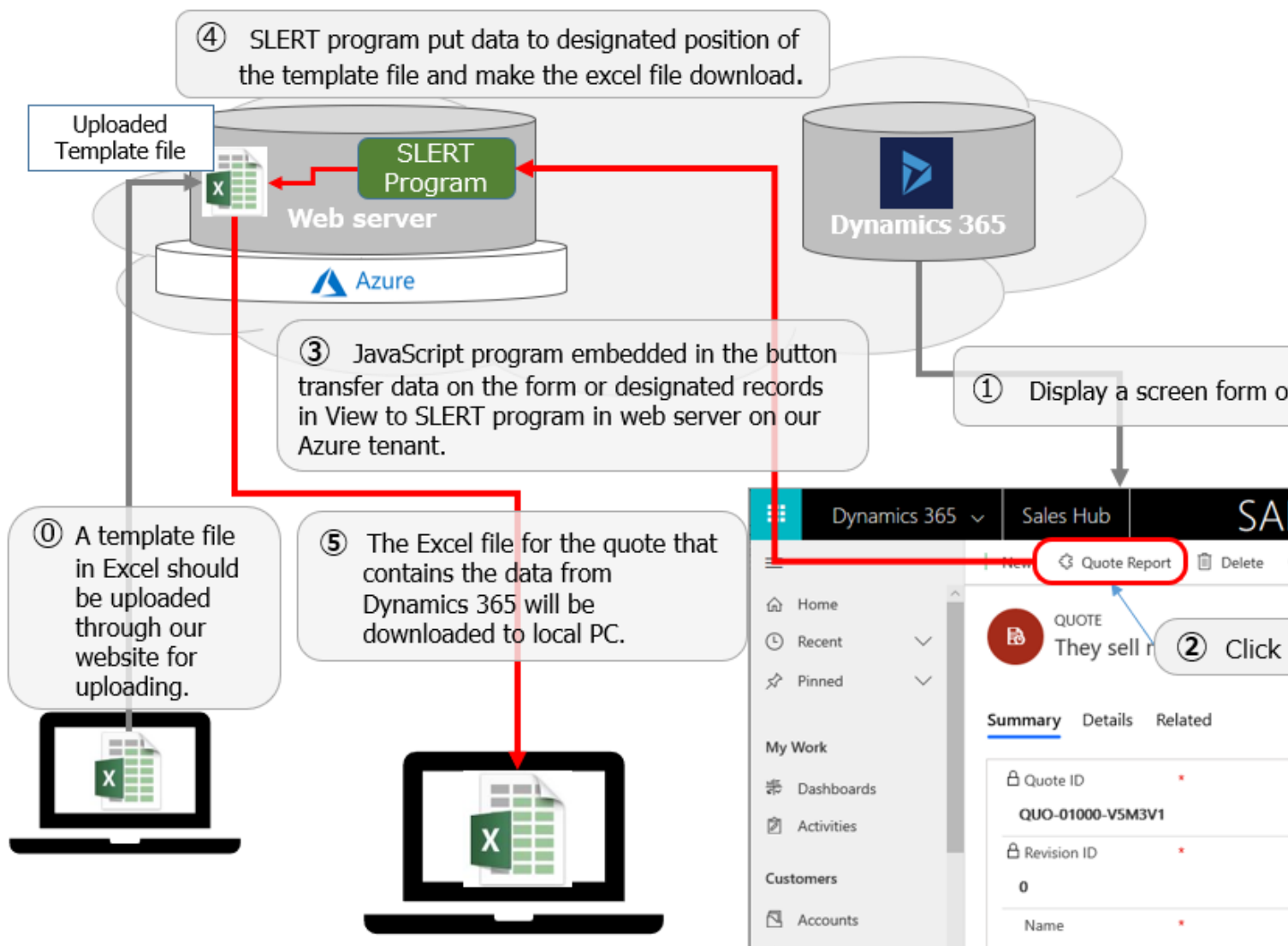
- I. About this service
- II. Application to AppSource and process to installing the solution
- III. Setup entities and buttons
- IV. Upload Report templates
- V. Form template configSheet settings
- VI. Specifications, restrictions, etc.
- VII. Solution Delete
- VIII. Technical support

April 15, 2019 : Edition 1.0 released

May 9, 2019 : Edition 2.0 released

I. About this service

The following figure outlines the structure of the service.



Clicking a button "Quote Report" on a form or a view of Dynamics 365 by the user, an Excel report is created and an Excel file is downloaded to a local PC.

II. Application to AppSource and process to installing the solution

In order to use this service, you need to click "Free trial" on Microsoft's AppSource.

I will get information for set-up including ID and password by email within 2 work days after you go through process of application to "Free trial". The information you get is used when you set up entities and login to the file upload site.

ID, password for the trial service can be used in formal service of SLERT.

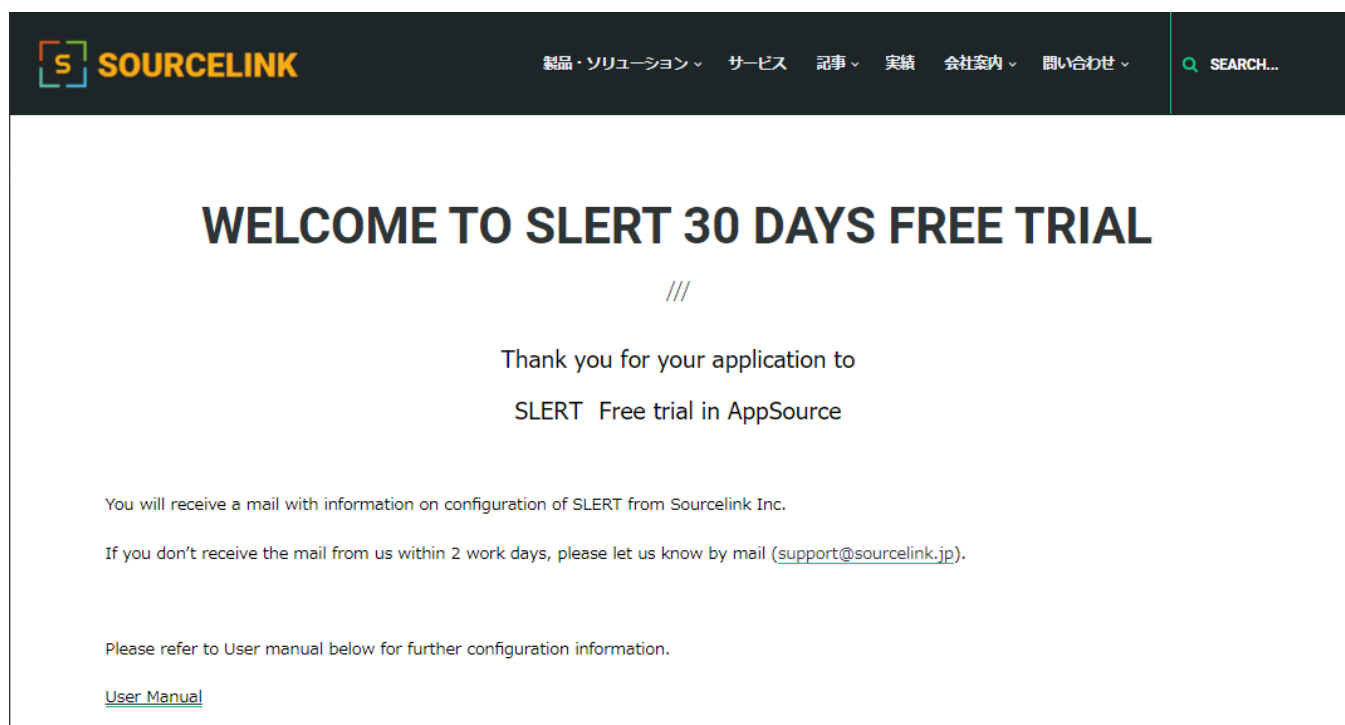
You will get documents for application to the formal service of SLERT in the email sent by Sourcelink Inc.

When you decide to use SLERT beyond trial service, fill out the forms in the document and sign it and send back to Sourcelink Inc.

Explanation on how to apply "Free trial" and all the set-up procedure will follow below.

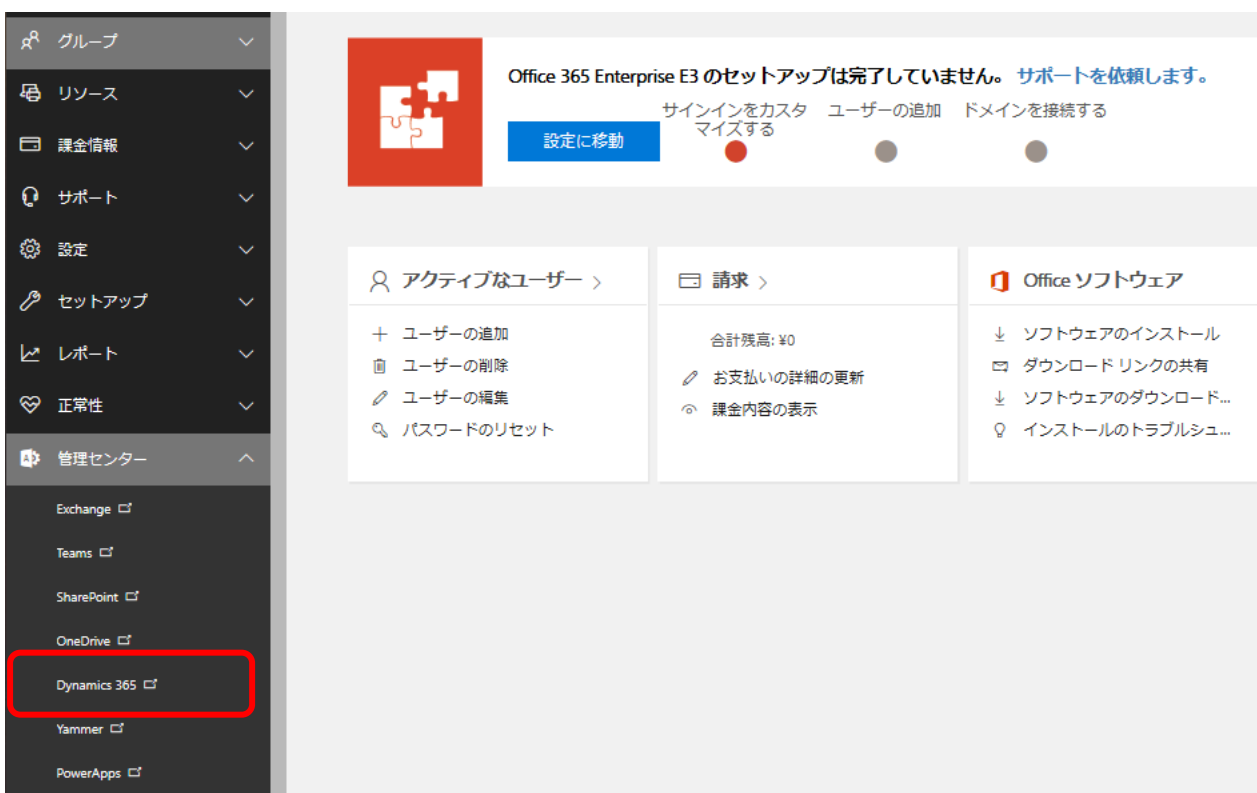
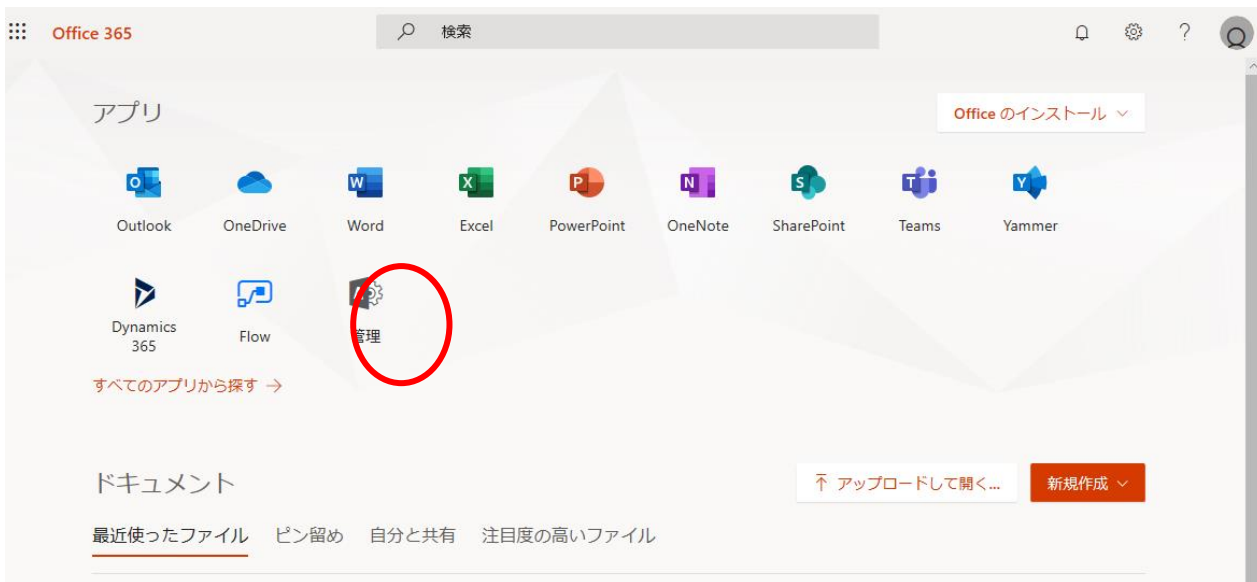
1. Click "Free trial" button on the SLERT banner in AppSource

When you go through the application procedure for "Free trial", you will see the screen below.



1. Installing the SLERT solution

In the Office 365, the click admin icon and then,click Dynamics 365, you are moved to Management Center of Dynamics 365.



Clicking "Dynamics 365" in the screen above will leads you to "Dynamics 365 Management Center".

At instance-tab, click your designated instance and click an icon located right down direction.
Then list of solutions in the instance will displayed.

Dynamics 365 管理センター

インスタンスを管理する優れた方法があります。新しい管理センターを使ってみる

インスタンス 更新 サービス正常性 バックアップと復元 アプリケーション

Dynamics 365 インスタンスの管理

地域: 日本 (JPN)
インスタンスの種類: すべて

名前	状態	地域	インスタンスの種類
株式会社ソースリンク	準備完了	日本 (JPN)	実稼働
株式会社ソースリンク2	準備完了	日本 (JPN)	サンドボックス

株式会社ソースリン...

実稼働
Dynamics 365, version 9.0

編集 コピー 通知

目的

インスタンスを編集して目的を追加します

ソリューション

Dynamics 365 Sales Application, OData v4 Data Provider

クイックヘルプ

新しいサポートセンター

Dynamics 365 Customer Engagement の新しいサポートセンターがご利用いただけるようになりました

[Dynamics 365 ヘルプとサポート Web サイトをご覧ください](#)

インスタンス

Dynamics 365 の複数インスタンスにアカウントがあります。アクセスするインスタンスを選択してください。

[詳細](#)

ご存じですか？

お使いのアカウントから、Dynamics 365 の複数インスタンスを購入することができます。追加の

Make sure that there is the SLERT solution "ExcelFrom_Sourcelink" and select there and click "Install".

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ソリューションの管理

ソリューションの管理

選択したインスタンスで管理する優先ソリューションをお選びください。株式会社ソースリンク

ソリューション名	バージョン	有効期限	状態
Email in Unified Interface	9.0.0.3025	2050/01/01	インストールされて...
ExcelForm_Sourcelink	1.0.0.0	2021/04/10	インストールされて...
Gamification	2019.3.15	2050/01/01	インストールされて...
Live Assist add-in powered...	1.0.0.0	2050/01/01	インストールされて...
Live Assist for Dynamics 3...	1.0.0.0	2050/01/01	インストールされて...
Live Assist for Microsoft D...	3.4.1.0	2050/01/01	インストールされて...
Live Assist for Microsoft D...	3.4.1.0	2050/01/01	インストールされて...
Microsoft Dynamics 365 ...	9.0.1438.4	2050/01/01	インストールされて...
OData v4 Data Provider	9.0.0.106	2050/01/01	インストール完了
Office 365 Groups	2.9.0.2	2050/01/01	インストールされて...

ExcelForm_Sourcelink

インストール

作成者: Sourcelink

[詳細](#)

Ex

Finished installation, Status becomes "Install completed".

Microsoft | Dynamics 365 Office 365 渡邊 新治 (slidemo92)

Dynamics 365 管理センター

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← ソリューションの管理

選択したインスタンスで管理する優先ソリューションをお選びください: slidemo92Sandbox

ソリューション名	バージョン	有効期限	状態
Email in Unified Interface	9.0.0.3025	2050/01/01	インストール完了
ExcelForm_Sourcelink	1.0.0.0	2021/04/10	インストール完了
Gamification	2019.3.15	2050/01/01	インストール完了
Live Assist add-in powere...	1.0.0.0	2050/01/01	インストールされて...
Live Assist for Dynamics 3...	1.0.0.0	2050/01/01	インストールされて...
Live Assist for Microsoft D...	3.4.1.0	2050/01/01	インストールされて...
Live Assist for Microsoft D...	3.4.1.0	2050/01/01	インストールされて...
Microsoft Dynamics 365 ...	9.0.1438.4	2050/01/01	インストールされて...
OData v4 Data Provider	9.0.0.106	2050/01/01	インストール完了

ExcelForm_Sourcelink
Excel帳票 株式会社ソースリンク
作成者: Sourcelink
詳細

III. Set up entities and buttons

1. Set up SLERT_info

Click "Advanced search". Then screen below will appears.

Microsoft | Dynamics 365 姚 テイテイ 株式会社ソースリンク

FILE ADVANCED FIND

Query Saved Views Results New Save Save As Edit Columns Edit Properties Clear Group AND Group OR Details Download Fetch XML Debug

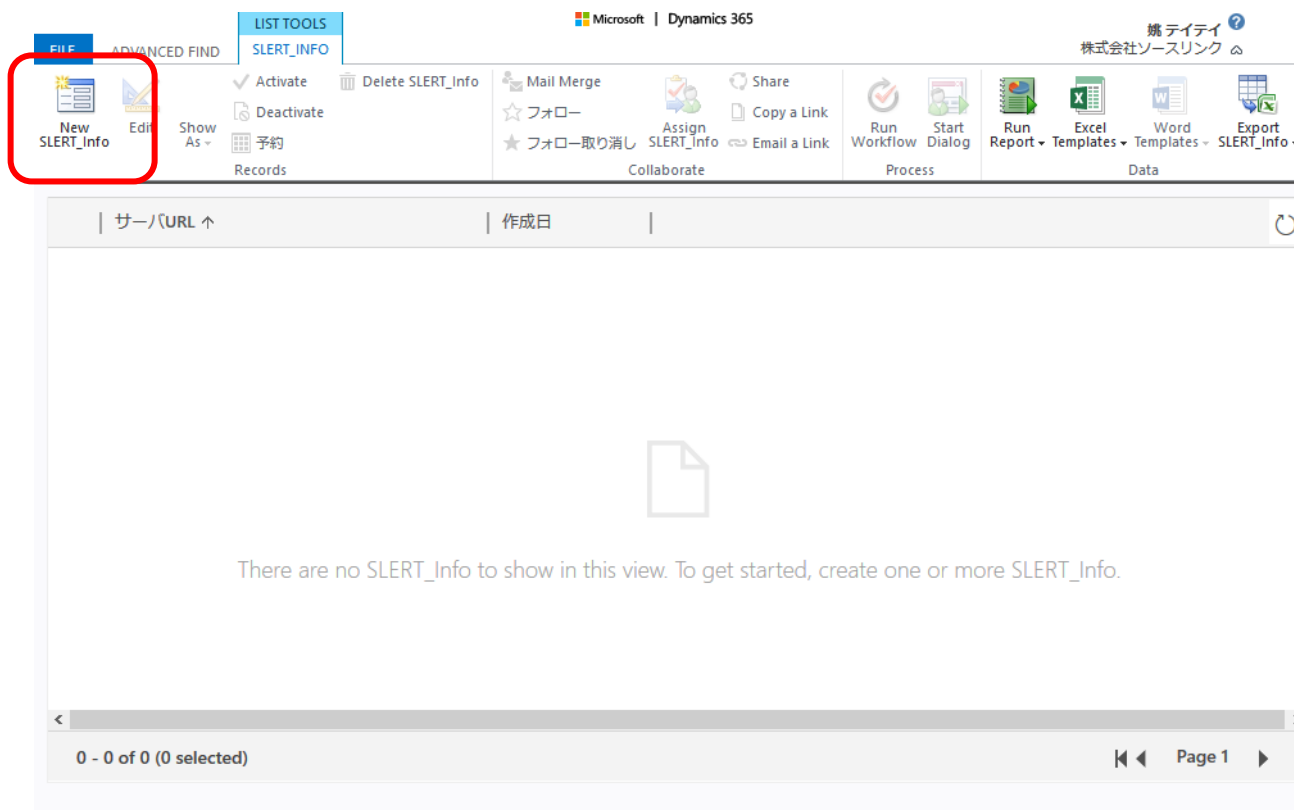
Look for: SLERT_Info Use Saved View: [new]

Select

Make sure you've created the entity of "SLERT_Info" in the screen of "Advanced Search".

By clicking "Result", "LIST TOOLS" tab will be displayed. That will be shown in Next section (4. Settings).

Then go to the LIST TOOLS in the same window. On the left side of the Ribbon, click “New SLERT_Info”.



Then the screen shown in the figure below is displayed. Input information (server URL and customer key) which is sent to you by mail after your application to the service is accepted. Filling out and save the information by clicking "SAVE".

Dynamics 365 | New SLERT_Info

Navigation: SAVE, SAVE & CLOSE, NEW, FLOW

SLERT_INFO : INFO

New SLERT_Info

所有者* 姚 テイテイ

全般

URL * https://form.sourcelink.jp/

Key * 5WUQtUEgv6Sr7kHh94ChjXyLVvSvGP+

javascript: アクティブ

1. Adding a report creation button

Then, Settings>Solution Screen of Dynamics 365 To display.

Double-click the solution of SLERT in solution view(following figure).

Dynamics 365 | Settings | SOLUTIONS | SANDBOX

All Solutions

Name	Display Name	Version	Installed On	Package T...	Publisher	Description
ExcelForm_Sourcelink	ExcelForm_Sourcelink	1.0.0.0	3/26/2019	Managed	株式会社ソースリンク	Excel帳票株式会社ソースリンク
LinkedIn	LinkedIn - Sales Navig...	3.0.0.0630	4/6/2019	Managed	LinkedIn	LinkedIn For Microsoft Dynamics CRM Integrati...
msdynce_EmailInUnifie...	Email in Unified Interf...	9.0.0.3025	3/26/2019	Managed	Dynamics 365	Provides email management capabilities using ...
msdynce_CustomerSe...	Customer Service Hub...	9.0.20.1807	3/26/2019	Managed	Dynamics 365	Patch for Dynamics 365 workload for service.
msdynce_CRMHub	Crm Hub	1.0.20170...	3/23/2019	Managed	Dynamics 365	
msdyn_LinkedinSalesN...	LinkedIn Sales Navigat...	3.0.0.0630	4/6/2019	Managed	Dynamics 365	Designed to create a seamless experience betw...
msdyn_playbook_app	Playbook App	9.0.1903.2...	3/26/2019	Managed	Dynamics 365	Playbooks is a capability that helps organization...
msdyn_SalesApp	Dynamics 365 Sales A...	9.0.1903.4...	3/26/2019	Managed	Dynamics 365	Automate sales processes and monitor perform...
LinkedInSalesNavigato...	Sales Navigator for D...	3.0.0.0630	4/6/2019	Managed	Dynamics 365	Target, understand and engage customers on Li...
msdynce_Customerser...	Customer Service Hub	9.0.5.0056	3/26/2019	Managed	Dynamics 365	A focused, interactive experience for managing ...
Crd82fc	Common Data Service...	1.0.0.0	3/23/2019	Unmanag...	CDS Default Publisher	

1 - 11 of 11 (0 selected) | All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | Page 1

You will see the following screen.

On this screen, you select the entity that you want to use to create the report.

https://sourcelinken.crm7.dynamics.com/tools/solution/edit.aspx?id={D42EC60E-B30B-4B26-ABA1-FBDFB469455D}

PowerApps

File Close Show Dependencies Actions Help

Solution: ExcelForm_Sourcelink

Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

Solution ExcelForm_Sourcelink

- Information
- Configuration
- Components
 - Entities
 - Option Sets
 - Client Extensions
 - Web Resources
 - Processes
 - Plug-in Assemblies
 - Sdk Message Processi...
 - Service Endpoints
 - Dashboards
 - Dialog Boxes
 - Reports
 - Connection Roles
 - Article Templates
 - Contract Templates
 - Email Templates
 - Mail Merge Templates
 - Security Roles
 - Field Security Profiles

Status: Existing

Select Entity

Button Name Report Name

Button Name	Report Name
-------------	-------------

On this screen, Click the "Get Information" button. You can see that the button has not been set yet for this quote entity shown below.

https://sourcelinken.crm7.dynamics.com/tools/solution/edit.aspx?id={D42EC60E-B30B-4B26-ABA1-FBDFB469455D}

PowerApps

File Close Show Dependencies Actions Help

Solution: ExcelForm_Sourcelink

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Solution ExcelForm_Sourcelink

- Information
- Configuration
- Components
 - Entities
 - Option Sets
 - Client Extensions
 - Web Resources
 - Processes
 - Plug-in Assemblies
 - Sdk Message Processi...
 - Service Endpoints
 - Dashboards
 - Dialog Boxes
 - Reports
 - Connection Roles
 - Article Templates
 - Contract Templates
 - Email Templates
 - Mail Merge Templates
 - Security Roles
 - Field Security Profiles

Status: Existing

Select Entity

Button Name Report Name

Button Name	Report Name
-------------	-------------

PowerApps

File Close Show Dependencies Actions Help

Solution: ExcelForm_Sourcelink

Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

Solution ExcelForm_Sourcelink

Information

Configuration

Components

- Entities
- Option Sets
- Client Extensions
- Web Resources
- Processes
- Plug-in Assemblies
- Sdk Message Process...
- Service Endpoints
- Dashboards
- Dialog Boxes
- Reports
- Connection Roles
- Article Templates
- Contract Templates
- Email Templates
- Mail Merge Templates
- Security Roles
- Field Security Profiles
- Routing Rule Sets
- Record Creation and ...

Status: Existing

SLERT Service Application is here <https://www.sourcelink.jp>

Select Entity: Quote[quote] Get Info Publish

Button Name: Run Report Report Name: Add Button Delete Button

Button Name	Report Name
No report button.	

Then, as for "Button name", input "Quote Report" to specify name of the button. Also, for "Report Name", input "Quote" to specify file name of a report template.

PowerApps

File Close Show Dependencies Actions Help

Solution: ExcelForm_Sourcelink

Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

Solution ExcelForm_Sourcelink

Information

Configuration

Components

- Entities
- Option Sets
- Client Extensions
- Web Resources
- Processes
- Plug-in Assemblies
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- Dashboards
- Dialog Boxes
- Reports
- Connection Roles
- Article Templates
- Contract Templates
- Email Templates
- Mail Merge Templates
- Security Roles
- Field Security Profiles
- Routing Rule Sets
- Record Creation and ...

Status: Existing

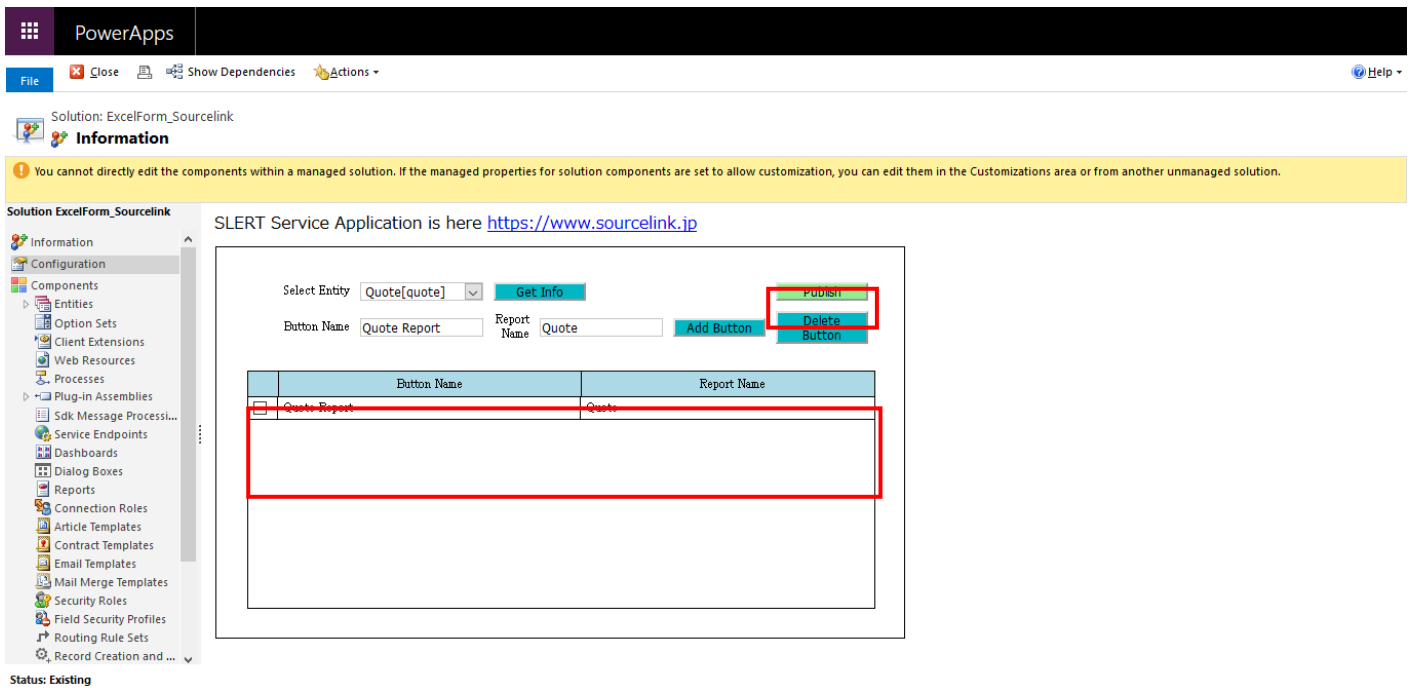
SLERT Service Application is here <https://www.sourcelink.jp>

Select Entity: Quote[quote] Get Info Publish

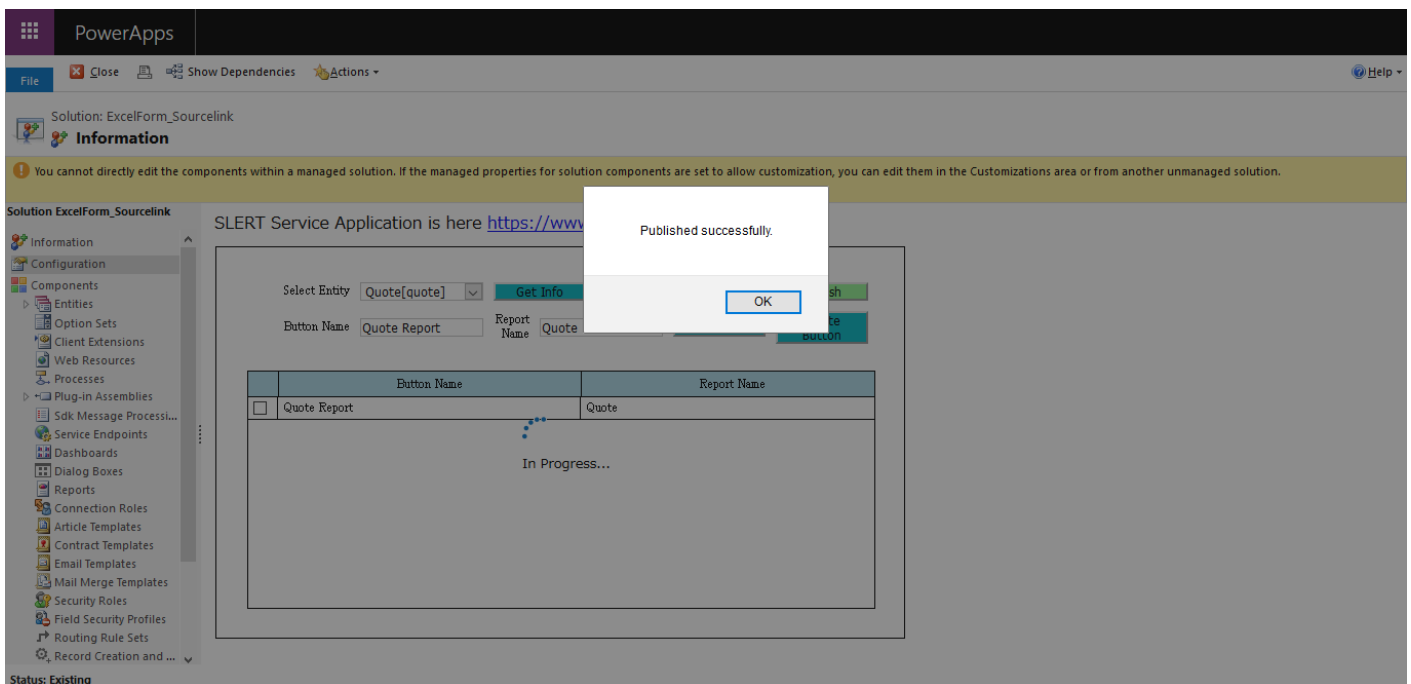
Button Name: Quote Report Report Name: Quote Add Button Delete Button

Button Name	Report Name
No report button.	

And then They are displayed in the table as shown below. Clicking [Publish], process of the displaying button proceeds.



A screen like this is displayed, and the button display processing has finished.



The button appears like this. Here The target entity

A button appears on the form screen of the target entity. (in this example, the button appears on a form, but also appears in the view as well.)

Dynamics 365 Sales Quotes > They sell many of the same items that we ...

QUOTE REPORT DELETE LOOK UP ADDRESS ACTIVATE QUOTE PRINT QUOTE FOR CUSTOMER GET PRODUCTS PROCESS ASSIGN

QUOTE: They sell many of the same items that we ... Total Amount: \$10.00 Effective From: Effective To: Owner: テイテイ 姚

Summary

Quote ID: QUO-01000-V5M3V1

Revision ID: 0

Name: They sell many of the same items that we do - need to

Currency: US Dollar

Price List: CRM Service USA (sample)

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount
products			\$10.00	1.00000	\$0.00	\$10.00

SALES INFORMATION

Opportunity: They sell many of the same items that we do - need to

Potential Customer: Contoso Pharmaceuticals (sample)

DESCRIPTION

SHIPPING INFORMATION

Shipping Method:

Detail Amount: \$10.00

Draft

A button is also displayed on the view screen.

Dynamics 365 Sales Quotes >

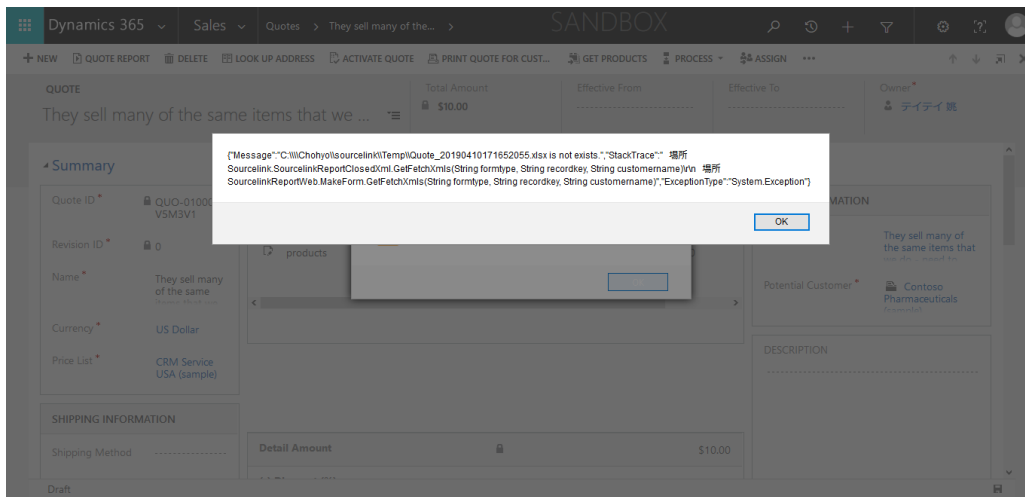
QUOTE REPORT DELETE SEND DIRECT EMAIL ASSIGN SHARE EMAIL A LINK RUN WORKFLOW

My Quotes

Name	Status	Total Amount	Potential Customer	Email (Potential Customer)	Created On
They sell many of the same items that we do - n...	Draft	\$0.00	Contoso Pharmaceutic...		4/8/2019 11:16 PM
They sell many of the same items that we do - n...	Draft	\$0.00	Contoso Pharmaceutic...		4/8/2019 11:17 PM

1 - 2 of 2 (1 selected) All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Page 1

In this situation, If you click "Quote Report", an error occurs because the report template is not registered yet. And you will see an error message similar to the following



IV. Register a report template

1. Preparing a report template

Access to our report template registration site(<https://form2.sourcelink.jp/>) and log in.

Use ID/PWD sent by email when registering the SLERT service.

Report template registration Site Login screen



Report Template Upload Site

Log In

On the Upload template screen, click [Download the sample form], a list of samples is displayed.(The Quotation.xlsx) Referring to the sample report template, you should make two sheets in the file. One is the report formatting sheet, and another sheet is a report configuration sheet. More information on the settings will be explained in the next chapter. File name of the Excel file should be Report name as mentioned in page 7.

Log in and you will see this screen. You can download the sample report file.



Report Template Upload Site

[Download Report Templates](#)
[Report List](#)

ファイルを選択 選択されていません

Upload



Estimate

2. Uploading a report template

Access and log in our report template registration site (<https://form.sourcelink.jp>) .

Use ID/PWD sent by email when registering the SLERT service.

The name of the file to upload should be the same as the file name specified at configuration.



Report Template Upload Site

[Download Report Templates.](#)

[Report List](#)

ファイルを選択 選択されていません

Upload



Report Template Upload Site

[Download Report Templates.](#)

[Report List](#)

ファイルを選択 選択されていません

Upload

Estimate.xlsx Upload succeeded.

3. Confirm / delete uploaded template

A list of uploaded templates is displayed by clicking "Report List".

Click the "Delete" if you want to delete the template.



Report Template Upload Site

[Download Report Templates.](#)

[Report List](#)

ファイルを選択 選択されていません

Upload

Estimate.xlsx Upload succeeded.



Report List

File Name	Delete
Estimate.xlsx	Delete

4. Confirmation of a report creation

After uploading the report template, open this form and make sure that by clicking "Quote report", a report is created.

Dynamics 365 Sales Quotes > They sell many of the same items that we ...

QUOTE: They sell many of the same items that we ...

Total Amount: \$10.00

Effective From: Effective To: Owner: テイテイ 姚

Summary

Quote ID: QUO-01000-V5M3V1

Revision ID: 0

Name: They sell many of the same items that we do - need to

Currency: US Dollar

Price List: CRM Service USA (sample)

PRODUCTS

Product Na...	Properties	Unit	Price Per U...	Quantity	Discount	Extended Amo...
products			\$10.00	1.00000	\$0.00	\$10.00

SALES INFORMATION

Opportunity: They sell many of the same items that we do - need to

Potential Customer: Contoso Pharmaceuticals (sample)

DESCRIPTION

Shipping Method:

Detail Amount: \$10.00

The report can be downloaded.

Clicking "OK", an Excel file containing a report is downloaded.

Dynamics 365 Sales Quotes > They sell many of the same items that we ...

QUOTE: They sell many of the same items that we ...

Total Amount: \$10.00

Effective From: Effective To: Owner: テイテイ 姚

Summary

Quote ID: QUO-01000-V5

Revision ID: 0

Name: They sell many

Currency: US Dollar

Price List: CRM Service U!

PRODUCTS

Product Na...	Properties	Unit	Price Per U...	Quantity	Discount	Extended Amo...
products			\$10.00	1.00000	\$0.00	\$10.00

SALES INFORMATION

Opportunity: They sell many of th

Potential Customer: Contoso Pharmi

DESCRIPTION

Shipping Method:

Payment Terms:

Freight Terms:

Detail Amount: \$10.00

(-) Discount (%):

Download report

Report has been created. Do you want to download it?

OK Cancel

V. Report template configSheet settings

自動保存

📄

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クォーテ.xlsx - Excel

英語タイプ

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This example is for quote. Main body of the quote uses the standard quote entity. Detail items are the item, uses the standard "Quote Products" entity.

1. Main body FetchXML

- ① In advanced search, the entity specifies "Quotes", and the search criteria specifies the "Quote" field. (Specify a field with the same name as the quote entity name.) Then, in the "Equals" section, specify a record for any quote entity. (In the figure below, the record "They sell many o..." is specified.)

https://sourcelinken.crm7.dynamics.com/main.aspx?appid=&pagetype=advancedfind#87215151

Microsoft | Dynamics 365

FILE ADVANCED FIND

Query Saved Views Results New Save Edit Columns Edit Properties View

Look for: Quotes

Equals

They sell many o...

Download FetchXML

- ② Click "Download FetchXML"
Open the downloaded file in the editor, such as "notepad" that came with Windows.

```

1 <fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">
2   <entity name="quote">
3     <attribute name="name" />
4     <attribute name="customerid" />
5     <attribute name="statecode" />
6     <attribute name="totalamount" />
7     <attribute name="quoteid" />
8     <attribute name="createdon" />
9     <order attribute="name" descending="false" />
10    <filter type="and">
11      <condition attribute="quoteid" operator="eq" uiname="They sell many of the
12      same items that we do - need to follow up (sample)" uitype="quote" value="{DD4D
13      C0F6-085A-E911-A972-000D3A4050E0}" />
14    </filter>
15  </entity>
16 </fetch>[EOF]

```

To be able to use all fields, replace with <all-attributes />

Delete because no need to reorder

Replace with "condition attribute = " Quoteid "operator = " eq "value = " {0} " />" to output with a button-selected GUID.

- ③ Paste the modified FetchXML into the main body FetchXML.

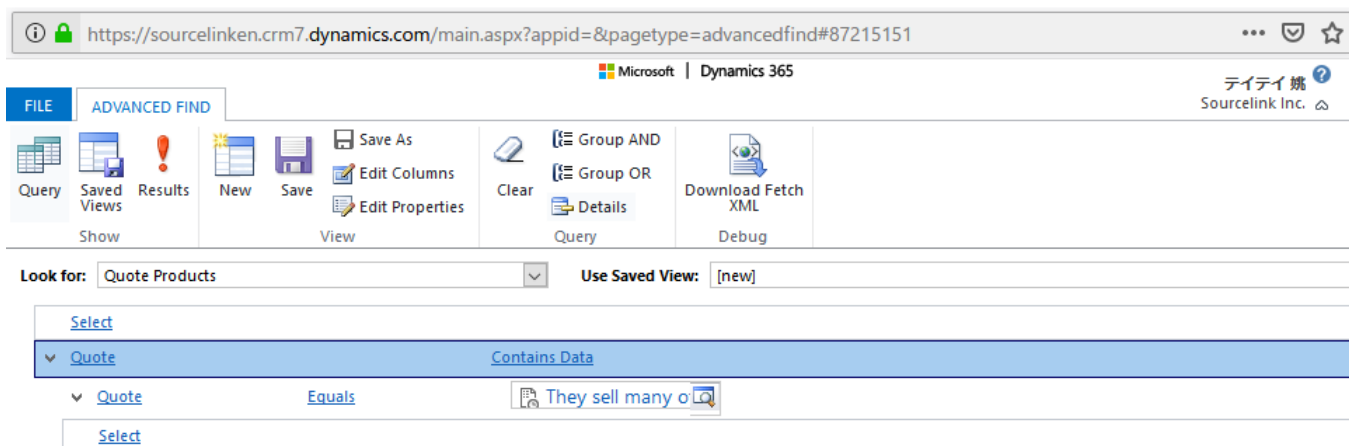
```

<fetch>
  <entity name="quote">
    <all-attributes />
    <filter type="and">
      <condition attribute="quoteid" operator="eq" value="{0}" />
    </filter>
  </entity>
</fetch>

```

2. Detail item FetchXML

- ① The entity is "Quote Products" and the key selects any record in the quote.



- ② Click "Download FetchXML"
In the editor, modify the content as follows :

1 <fetch version="1.0" output-format="xml-plain">
2 <!-->
3 <entity name="quotedetail">
4 <!-->
5 <!-->
6 <!-->
7 <!-->
8 <!-->
9 <!-->
10 <!-->
11 <!-->
12 <!-->
13 <!-->
14 <!-->
15 <!-->
16 <!-->
17 <!-->
18 <!-->
19 <!-->
20 </fetch>[EOF]

Replace with <all-attributes /> to be able to use all fields, replace

Delete because no need to reorder

Replace to <link-entity name="quote" from="quoteid" to="quoteid" link-type="inner" alias="quote">

Replace with "condition attribute = " Quoteid "operator = " eq "value = " {0} "/"> to output with a button-selected GUID

3. The modified FetchXML is pasted in detail item FetchXML

- ③ Paste the modified FetchXML into the detailed items FetchXML.

```
<fetch>
<entity name="quotedetail">
  <all-attributes />
  <link-entity name="quote" from="quoteid" to="quoteid" link-type="inner" alias="quote">
    <attribute name="name" />
    <filter type="and">
      <condition attribute="quoteid" operator="eq" value="{0}" />
    </filter>
  </link-entity>
</entity>
</fetch>
```

4. Main body Field Mapping

MAIN INFO FIELD NAME	CELL

Sets the physical name and cell number of the field.

Example:

MAIN INFO FIELD NAME	CELL
customerid	A4
quotenumber	J2
[SYSTEMDATE]	I3
name[string]	D7
paymenttermscode	D11
new_delivery_date	D12
expireson	D13
description	A26

※ When "[SYSTEMDATE]" is entered, it is set by the system date at the time of output.

5. Item Information Field Mapping

Example:

DETAILS FIELD NAME	CELL
[LINE NUMBER]	A
productname	B
priceperunit_Property	F
uomid	G
quantity	H
baseamount_Property	I

※ When "[LINE NUMBER]" is entered, it is set sequentially from 1.

6. Detail items functional settings

Details Line From: Item start line number

Details Line To: Item end line number

Self-increasing Lines: If the line item is greater than the number of lines in the template, the number of lines to be automatically added (usually set to 1)

Insert Line: Insert from line when line is automatically added

Line Copy From/Line Copy To: Auto-added lines copy format from a specified range

Grouping Field: The physical name of the grouping

Grouping Display Cell: Grouping items to be displayed in the corresponding cell:

Grouping Subtotal Lines: Subtotal line output necessity (normally set 1)

Grouping Subtotal Cell: The cell that outputs the "subtotal" string

Grouping Subtotal Amount Cell: Cell grouping to display subtotal amount

Grouping Blank Lines: If there is no grouping, how many blank lines to output (set 1 if you want to output a line) Example:

DETAILS SETTINGS	VALUE
Details Line From	18
Details Line To	21
Self-increasing Lines	1
Insert Line	20
Line Copy From	A
Line Copy To	J
Grouping Field	productid
Grouping Display Cell	B
Grouping Subtotal Lines	1
Grouping Subtotal Cell	H
Grouping Subtotal Amount Cell	I
Grouping Blank Lines	1

6. Input rules

- ① The cell designation is a single-byte alphanumeric character only.
- ② If a field of the currency type, number type, or option set type contains only the physical name of the field, the same values as the Dynamics 365 screen are output to the report, but the physical name Property "will be output to the form by the value contained in the database.

Currency type: If there is no "_Property" output as a string with a currency mark and a comma, if there is "_Property" the number will be output only.

Number type: If there is no "_Property" output as a string with a comma, "_Property" is output only if the number is printed.

VI. Specifications, restrictions, etc.

Excel files with macros are also available as templates.

You can put an image file in a record in Dynamics 365 and place it on an Excel sheet. (The imprint of the sample is the one that the company Mark puts an image in an Excel template, and the personal seal is output from Dynamics365 data to an Excel report template.)

The software we have developed in this service uses the following open source software source code. •

OpenXML

ClosedXML

Limitation:

1. The number of rows in a single FetchXML is less than 5,000.
2. SLERT reads the contents of FetchXML all at once and retrieve the data, so the FetchXML behind cannot refer data in the results of the previous fetchxml.

VII. Solution Delete

In order to delete the solution, you need to delete the added button first.

You will see the following screen.

On this screen, you select the entity that you added button.

Click [Get Info].

The screenshot shows the PowerApps solution editor for a solution named 'ExcelForm_Sourcelink'. The interface includes a top navigation bar with 'File', 'Close', 'Show Dependencies', and 'Actions' menus. A yellow warning banner states: 'You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.'

On the left, a sidebar lists solution components under 'Solution ExcelForm_Sourcelink', including Information, Configuration, and various entities like Option Sets, Client Extensions, and Reports. The 'Status' is shown as 'Existing'.

The main workspace displays the 'SLERT Service Application' configuration. It features a 'Select Entity' dropdown menu with 'Quote[quote]' selected, and a 'Get Info' button highlighted with a red box. Other buttons include 'Publish', 'Add Button', and 'Delete Button'. Below these are input fields for 'Button Name' (containing 'Run Report') and 'Report Name'. At the bottom, there is a table with two columns: 'Button Name' and 'Report Name'.

Button Name	Report Name
-------------	-------------

The added button will be displayed, so select and click [Delete Button].

Solution: ExcelForm_Sourcelink - Microsoft Dynamics 365 - Google Chrome

https://sourcelink.crm7.dynamics.com/tools/solution/edit.aspx?id=%7b0F4F5D1F-07B3-4CD2-A545-BBB5B703CDE2%7d

PowerApps

File Close Show Dependencies Actions Help

Solution: ExcelForm_Sourcelink

Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

Solution ExcelForm_Sourcelink

Information
Configuration
Components
Entities
Option Sets
Client Extensions
Web Resources
Processes
Plug-in Assemblies
Sdk Message Processin...
Service Endpoints
Dashboards
Dialog Boxes
Reports
Connection Roles
Article Templates
Contract Templates
Email Templates
Mail Merge Templates
Security Roles
Field Security Profiles

Status: Existing

SLERT Service Application is here <https://www.sourcelink.jp>

Select Entity: Quote[quote] Get Info Publish

Button Name: Run Report Report Name: Add Button Delete Button

	Button Name	Report Name
<input checked="" type="checkbox"/>	Quote Report	Quote

Then click [Publish].

PowerApps

File Close Show Dependencies Actions Help

Solution: ExcelForm_Sourcelink

Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

Solution ExcelForm_Sourcelink

Information
Configuration
Components
Entities
Option Sets
Client Extensions
Web Resources
Processes
Plug-in Assemblies
Sdk Message Processin...
Service Endpoints
Dashboards
Dialog Boxes
Reports
Connection Roles
Article Templates
Contract Templates
Email Templates
Mail Merge Templates
Security Roles
Field Security Profiles

Status: Existing

SLERT Service Application is here <https://www.sourcelink.jp>

Select Entity: Quote[quote] Get Info Publish

Button Name: Run Report Report Name: Add Button Delete Button

	Button Name	Report Name
	No report button.	

Solution: ExcelForm_Sourcelink - Microsoft Dynamics 365 - Google Chrome

https://sourcelinken.crm7.dynamics.com/tools/solution/edit.aspx?id=%7b0f4f5d1f-07b3-4cd2-a545-bbb5b703cde2%7d

PowerApps

File Close Show Dependencies

Solution: ExcelForm_Sourcelink

Information

sourcelinken.crm7.dynamics.com の内容

Published successfully.

OK

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

Solution ExcelForm_Sourcelink

Information

Configuration

Components

- Entities
- Option Sets
- Client Extensions
- Web Resources
- Processes
- Plug-in Assemblies
- Sdk Message Processin...
- Service Endpoints
- Dashboards
- Dialog Boxes
- Reports
- Connection Roles
- Article Templates
- Contract Templates
- Email Templates
- Mail Merge Templates
- Security Roles
- Field Security Profiles

Status: Existing

SLERT Service Application is here <https://www.sourcelink.jp>

Select Entity: Quote[quote] Get Info Publish

Button Name: Run Report Report Name: Add Button Delete Button

Button Name	Report Name
No report button.	
In Progress...	

When publishing is successful select a solution and click [Delete] , the solution will be removed.

Dynamics 365 Settings Solutions

SANDBOX

All Solutions

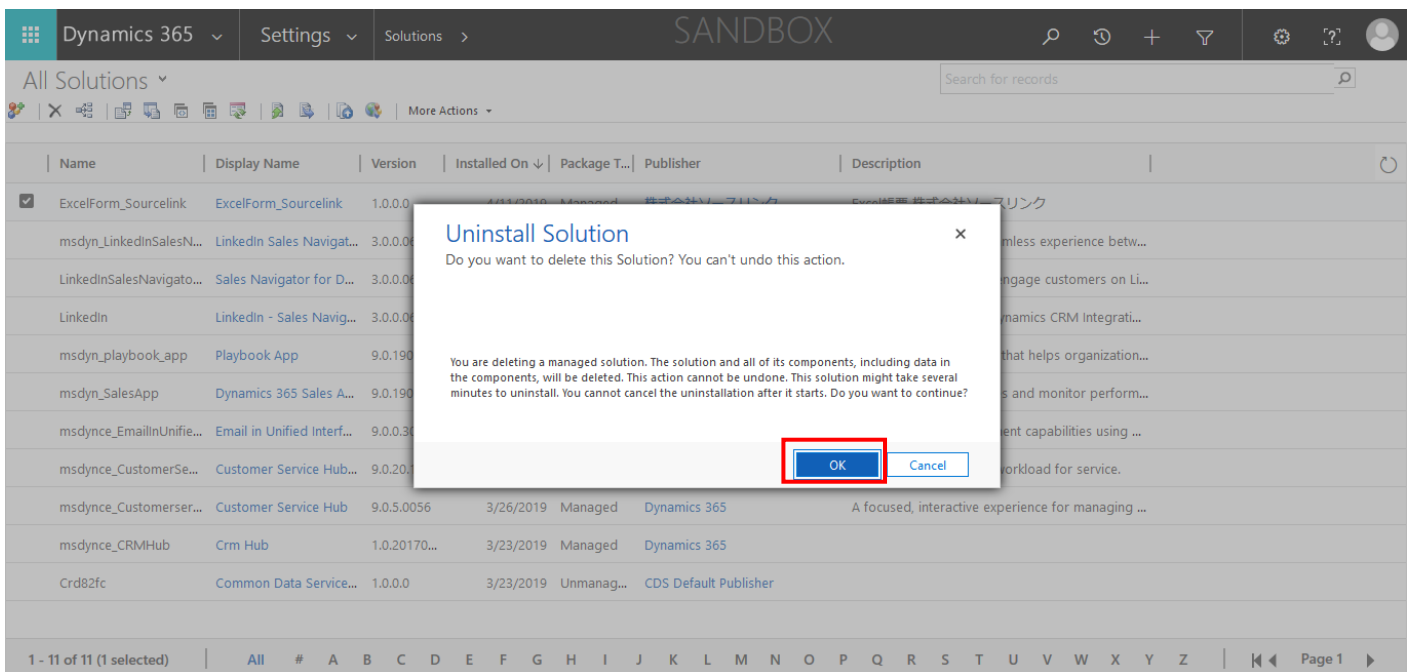
Search for records

Name	Display Name	Version	Installed On	Package T...	Publisher	Description
ExcelForm_Sourcelink	ExcelForm_Sourcelink	1.0.0.0	4/11/2019	Managed	株式会社ソースリンク	Excel帳票 株式会社ソースリンク
msdyn_LinkedInSalesN...	LinkedIn Sales Navigat...	3.0.0.0630	4/6/2019	Managed	Dynamics 365	Designed to create a seamless experience betw...
LinkedInSalesNavigato...	Sales Navigator for D...	3.0.0.0630	4/6/2019	Managed	Dynamics 365	Target, understand and engage customers on Li...
LinkedIn	LinkedIn - Sales Navig...	3.0.0.0630	4/6/2019	Managed	LinkedIn	LinkedIn For Microsoft Dynamics CRM Integrati...
msdyn_playbook_app	Playbook App	9.0.1903.2...	3/26/2019	Managed	Dynamics 365	Playbooks is a capability that helps organization...
msdyn_SalesApp	Dynamics 365 Sales A...	9.0.1903.4...	3/26/2019	Managed	Dynamics 365	Automate sales processes and monitor perform...
msdynce_EmailInUnifie...	Email in Unified Interf...	9.0.0.3025	3/26/2019	Managed	Dynamics 365	Provides email management capabilities using ...
msdynce_CustomerSe...	Customer Service Hub...	9.0.20.1807	3/26/2019	Managed	Dynamics 365	Patch for Dynamics 365 workload for service.
msdynce_Customerser...	Customer Service Hub	9.0.5.0056	3/26/2019	Managed	Dynamics 365	A focused, interactive experience for managing ...
msdynce_CRMHub	Crm Hub	1.0.20170...	3/23/2019	Managed	Dynamics 365	
Crd82fc	Common Data Service...	1.0.0.0	3/23/2019	Unmanag...	CDS Default Publisher	

1 - 11 of 11 (1 selected)

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Page 1



VIII. Technical support

Technical support about the "Excel Report creation Tool" will be available for 30 days after ID/PWD is issued. Subsequent support will be paid and will be available through support maintenance service. In addition to Excel reports, we also support the creation of reports in Microsoft products, including SSRS. If you are considering using Dynamics 365, please contact us.

SOURCE Link Inc. www.sourcelink.jp

