



User Manual

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INTRODUCTION

Click2Export is a Dynamics CRM solution which provides easy user experience of exporting any of the Dynamics CRM Reports/Word/Excel/Email templates (CRM Views Data). Dynamics CRM Reports can be exported in Excel, Word, PDF, CSV or TIFF format. Word Templates can be exported in PDF and MS Word format. Whereas, Excel Templates are exported in excel format. Further, user can embed CRM view in a table within the email body and auto-send it to required recipients. Apart from this, users can perform the required action for the exported Report as attach to Email, Note, upload to SharePoint or simply download the file on the system or all of the above.

- ✓ One click export tool for Dynamics CRM Reports/Word/Excel/Email Templates (CRM Views Data)
- ✓ Multiple file formats supported – PDF, MS Word, MS Excel, CSV &TIFF format
- ✓ Support for Fetch based reports
- ✓ Multiple export options supported – Download File, Attach as Email Attachment or Attach as a note, Upload to 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 can be exported
- ✓ Available to export the report for a single record or multiple records with one click
- ✓ Default Email templates can be specified for generating the email for the Email option
- ✓ Available to auto send the Email by exporting and attaching the exported report file
- ✓ Available to upload the exported report file on SharePoint
- ✓ Available to automatically export Dynamics CRM Word Template/CRM Report Template and attach to Email, auto send the Email with Email Attachment, Attach as a Note or upload report file on SharePoint with the Workflow on various CRM processes
- ✓ SSRS/Word/Excel Templates and CRM Views scheduling for On-Premise and online
- ✓ Support for Manager option while selecting email recipients

- ✓ Ability to append Date-Time field's data in custom Date-Time formats to the file name while exporting the report

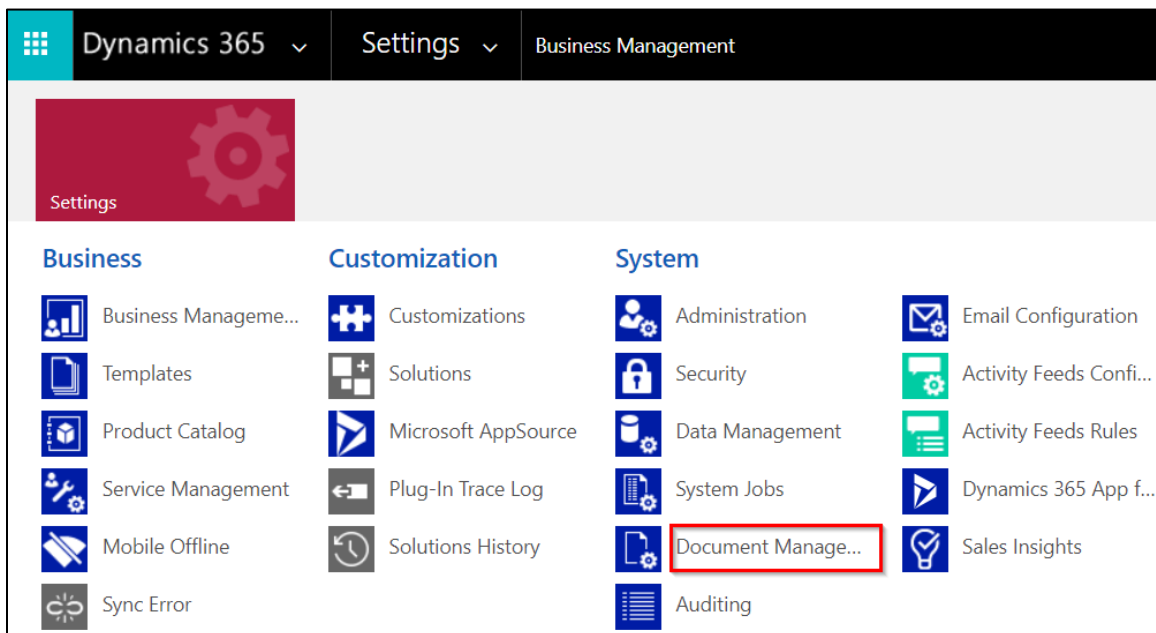
PREREQUISITES

Enable SharePoint Integration

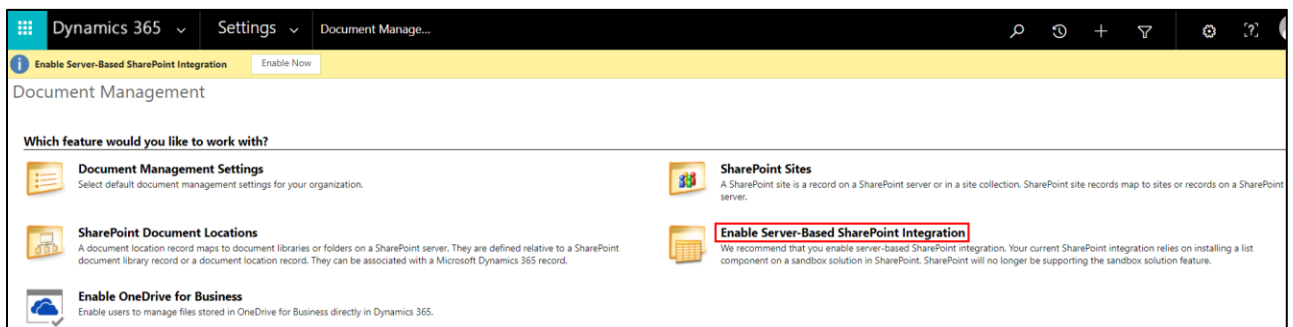
Before you start using Click2Export solution, it is necessary to enable server-based SharePoint integration for your Dynamics 365 CRM environment.

To do this, follow the steps given below:

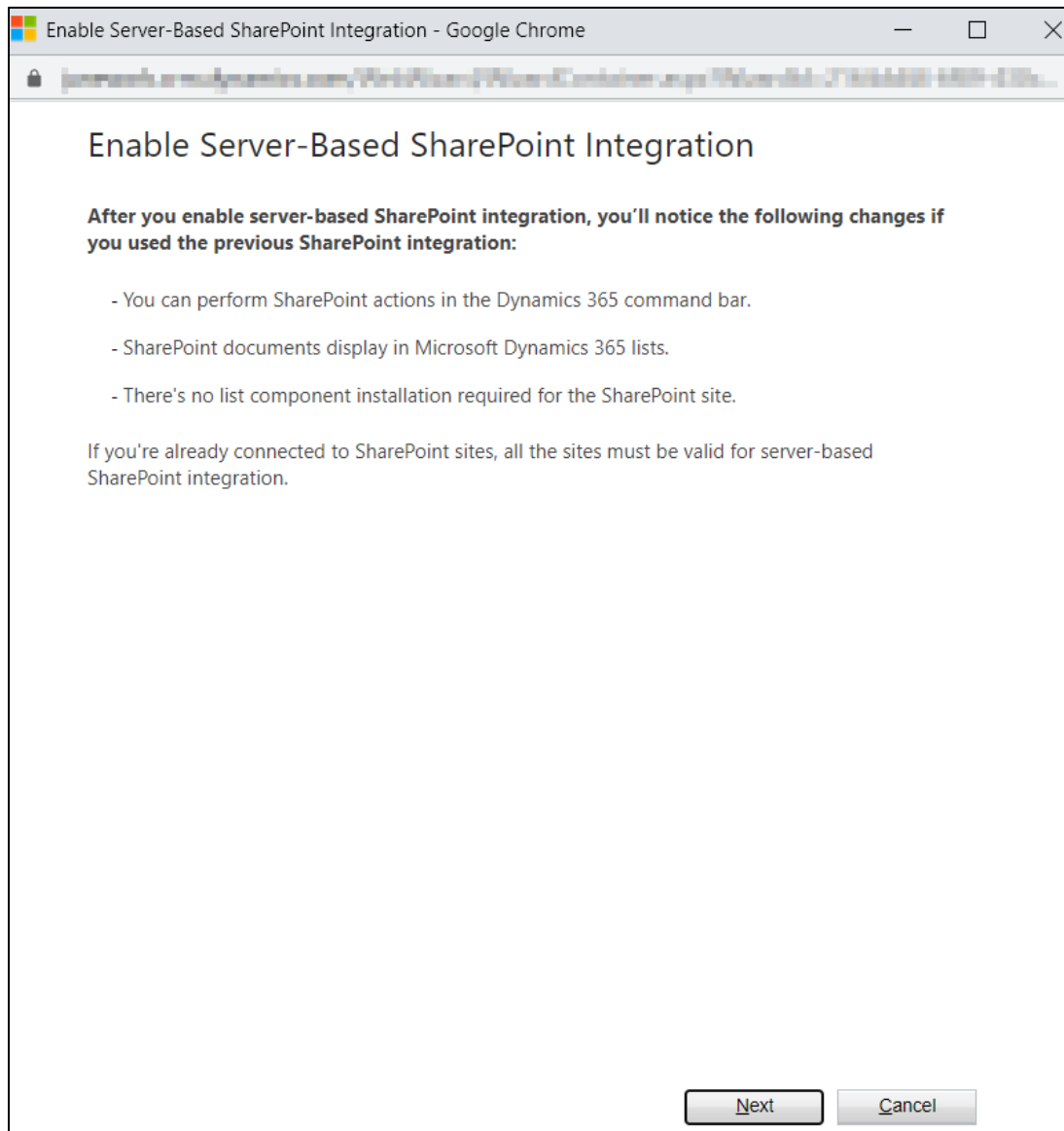
- 1) Navigate to **Advanced Settings → Settings → Document Management**.



- 2) Go to **'Enable Server-Based Sharepoint Integration'**.



3) Click on **Next**.



4) Now, select the **location of SharePoint site** and click on **Next**.

Enable Server-Based SharePoint Integration

Define Deployment → Prepare Sites → Validate Sites

Server-based SharePoint integration can connect to online or on-premises SharePoint sites. If multiple SharePoint sites are used, all sites must be of the same deployment type.

Select where your SharePoint sites are located:

Online
 On-Premises

All SharePoint Online sites must be in the same tenant as Microsoft Dynamics 365.

5) Now, enter the **URL of SharePoint site** that you want to use → Click on **Next**.

Enable Server-Based SharePoint Integration

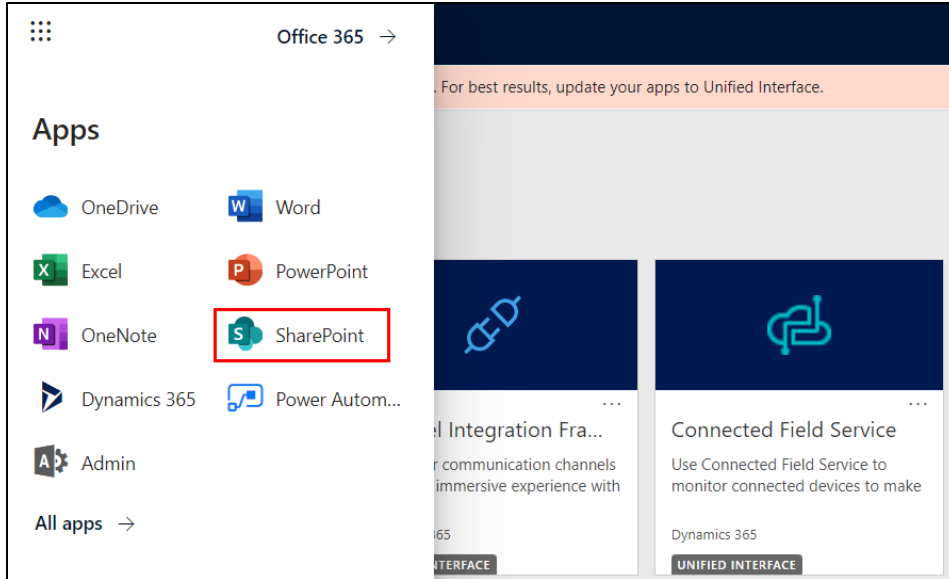
Define Deployment **Prepare Sites** Validate Sites

No additional setup requirements are required for connecting Dynamics 365 Online to SharePoint Online.

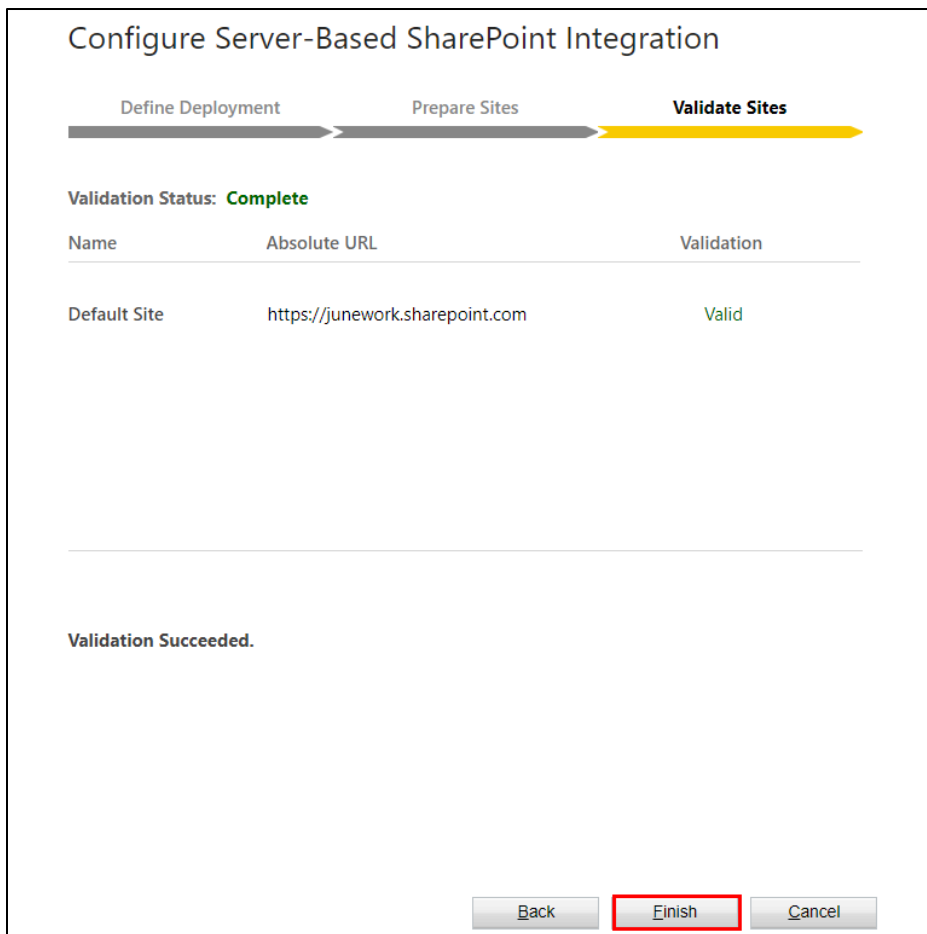
Enter the URL of the SharePoint site for use with server-based integration.

URL

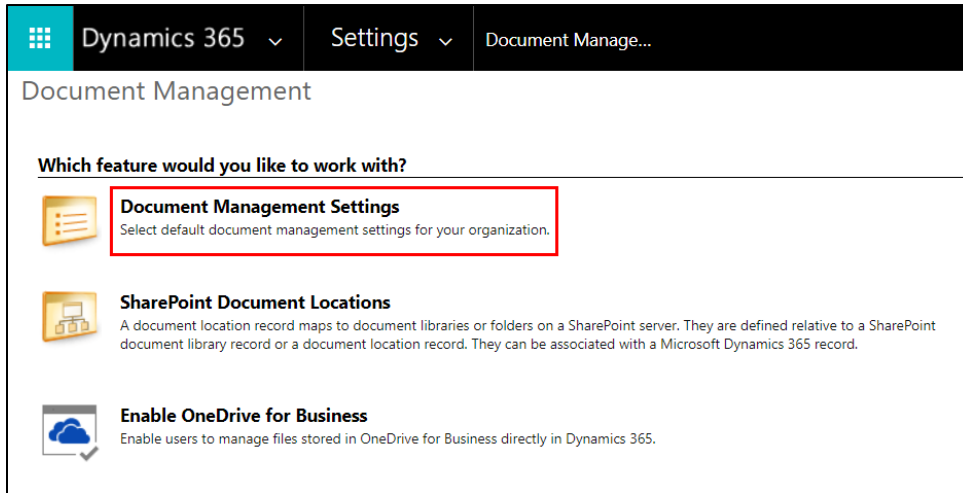
6) You can get the URL of SharePoint site from here.



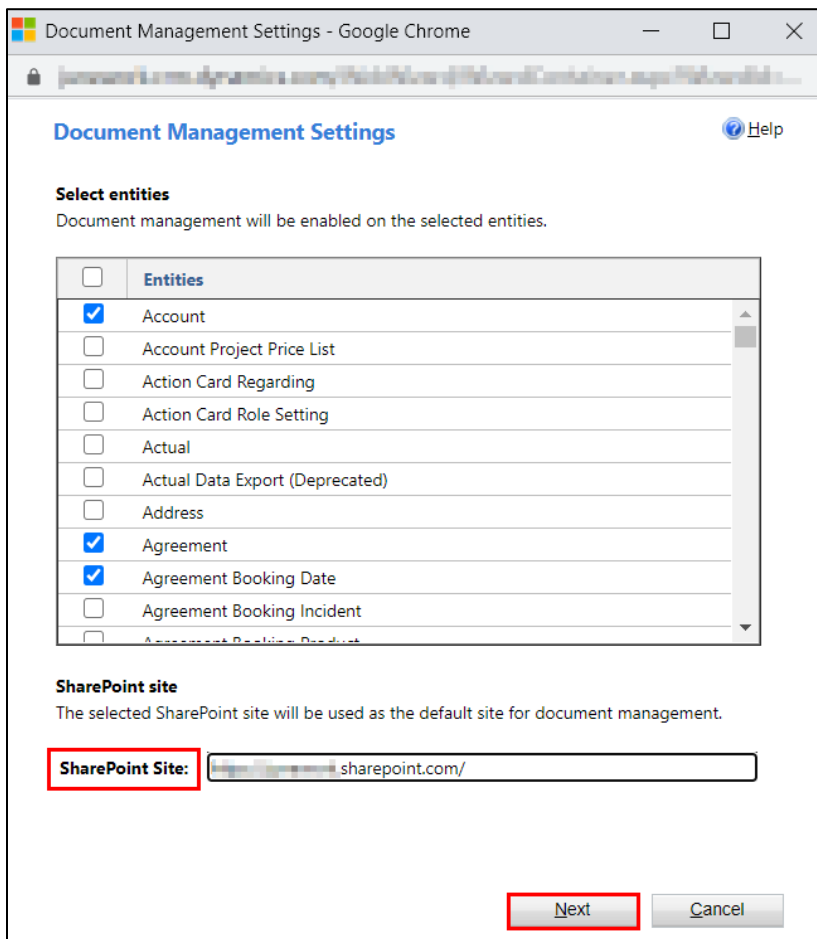
7) Once the site is validated, click on **Finish**.



- 8) The **server-based integration** of SharePoint site is now **enabled** for your Dynamics 365 CRM environment. Now, go back to **Settings → Document Management Settings**.




- 9) Select the **Entities** for which **Document Management** needs to be enabled → Enter the **URL of active SharePoint sites** where you want to store documents → Click on **Next**.



10) Click on **Next**.

Document Management Settings Help

 <https://junework.sharepoint.com/> is a valid URL.

Select folder structure

To create a folder structure based on a specific entity, click the check box, and select an entity. Folders will be created on SharePoint in the context of your Microsoft Dynamics 365 records.

Based on entity

11) Click on **Finish**.

Document Management Settings Help

Document Library Creation Status

To be created:	38
Newly created:	38
Failed:	0
Already existing:	0

Creation Details

Entities	Document Library	Status	Failure Reason
Account	...	Succeeded	
Agreement	...	Succeeded	
Agreement B...	...	Succeeded	
Agreement B...	...	Succeeded	
Agreement In...	...	Succeeded	
Agreement In...	...	Succeeded	
Article	...	Succeeded	
Booking Time...	...	Succeeded	
Category	...	Succeeded	
Expense	...	Succeeded	
Fulfillment D...	...	Succeeded	

Back
Finish
Cancel

Once this is done, you can easily export and upload reports related to selected Entities in the respective SharePoint site using Click2Export button.

ESSENTIAL PRIVILEGES

In this section you will learn about the privileges required to export reports and templates.

For Excel & Email Templates which exports data for a particular view the following privileges are required.

The screenshot shows the 'Security Role: Sales Manager' configuration page in Power Apps. The 'Business Management' tab is selected and highlighted with a green box. Under the 'Privacy Related Privileges' section, 'Export to Excel' and 'Mail Merge' are highlighted with green boxes. A key at the bottom indicates that a green dot represents 'Organization' and a yellow dot represents 'Business Unit'.

Privilege	Organization	Business Unit	User	Parent: Child Business Units
Document Generation	●			
Export to Excel	●			
Mail Merge	●			
Sync to Outlook	●			
Dynamics 365 for mobile	●			
Go Offline in Outlook	●			
Print	●			
Use Dynamics 365 App for Outlook	●			

For Word & Excel Templates the following privileges are required:

The screenshot shows the 'Security Role: Sales Manager' configuration page in Power Apps. The 'Business Management' tab is selected. A table below shows the required privileges for 'Document Template' and 'Personal Document Template'. A key at the bottom indicates that a green dot represents 'Organization' and a yellow dot represents 'Business Unit'.

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Business Unit	○	●	○	○	○	○		
Channel Property Group	●	●	●	●	●	●		
Currency	●	●	●	●	●	●		
Document Template	○	●	○	○	○	○		
Email Server Profile	○	●	○	○	○	○	○	○
Field Security Profile	○	●	○	○	○	○		
Field Sharing	●	●	●	●	●	●		
Goal	○	○	○	○	○	○	○	○
Goal Metric	●	●	●	●	●	●		
Mailbox	○	○	○	○	○	○	○	○
Mailbox Auto Tracking Folder	○	○	○	○	○	○	○	○
Organization		●	○	○	○	○		
Personal Document Template	○	●	○	○	○	○	○	○
Position	○	●	○	○	○	○		
Principal Sync Attribute Map			○					
Rollup Query	○	○	○	○	○	○	○	○

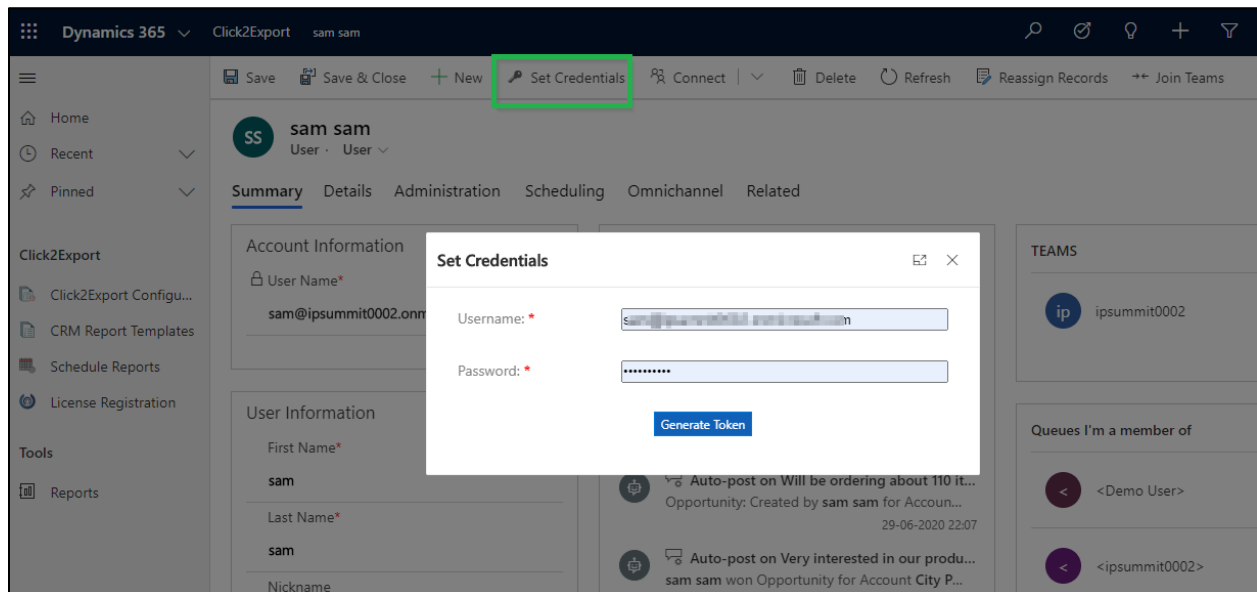
Note: Both privileges are required to export Excel Templates.

SET CREDENTIALS

This step is mandatory in case of **Scheduling and Export of Excel/Word templates** (if PDF format is selected) using Click2Export UI.

Once you have set credentials and generated token, you can then perform the above mentioned tasks with ease.

For this, you have to navigate to **Personalization Settings --> General Tab --> User Information --> Click on Set Credentials button and generate token.**



If Multi Factor Authentication is enabled then in this case you need to create Azure Active Directory App. For details, please [click here](#).

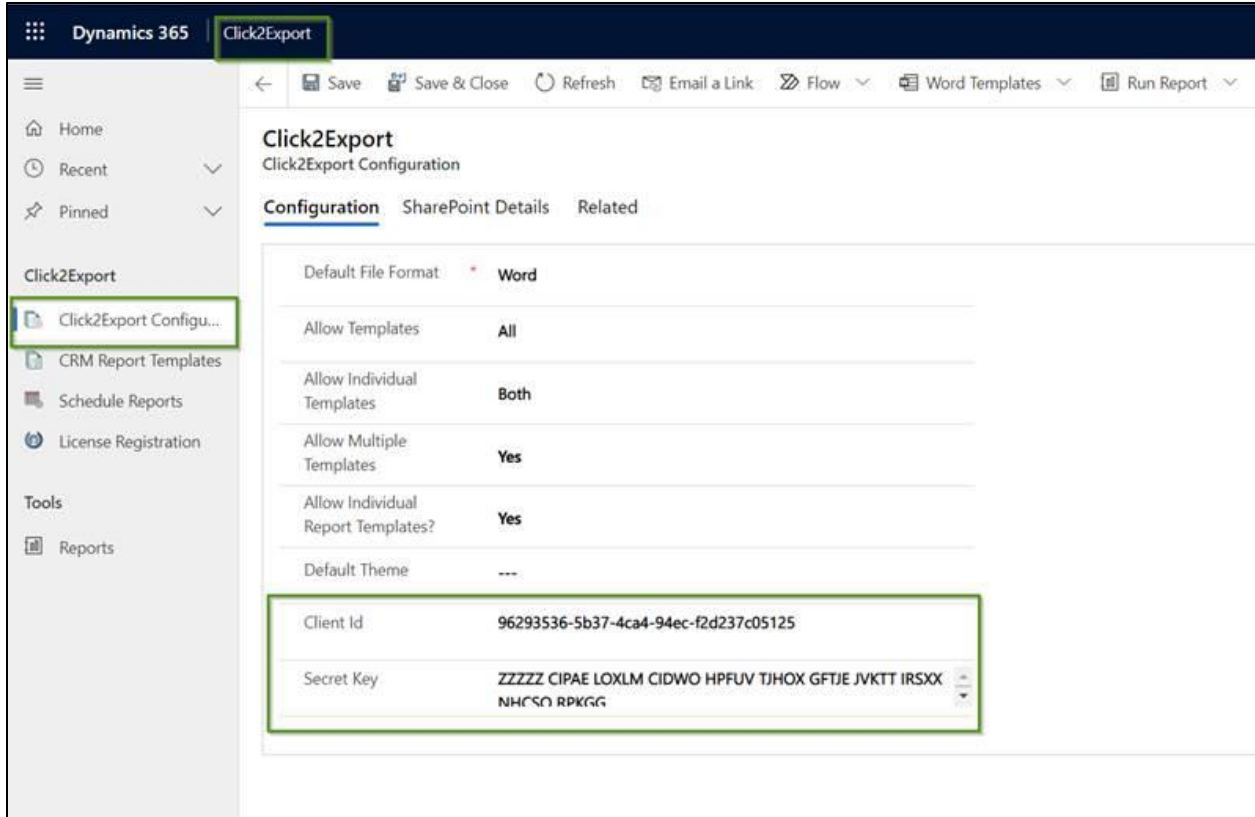
Follow the same steps and make sure the redirect URL is:

'https://crmurl/WebResources/ikl_/Click2Export/html/Callback.html'.

Once app is created, navigate to **Click2Export Configuration Entity --> Paste client id and secret key --> Save the record.**

Client ID: This is the app ID that you have created.

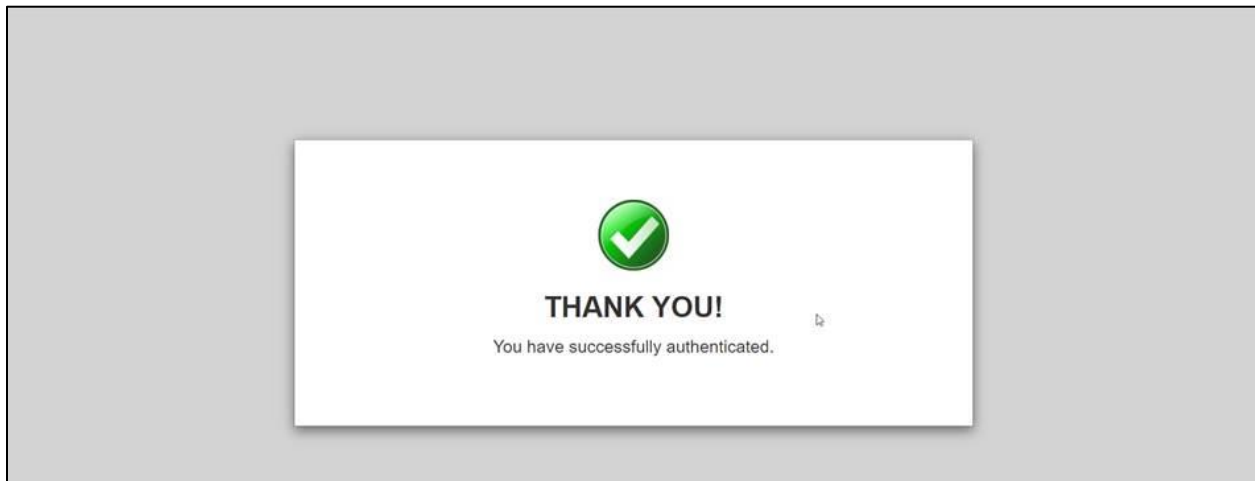
Secret Key: This is the value of the secret key for the app that you have created.



Now navigate to **Personalization Settings --> General Tab --> User Information --> click on Set Credentials button and generate token.**

Note:- Set Credentials has to be done by every user separately that is going to use Click2Export.

You will get confirmation if it is successfully connected.



CRM REPORT TEMPLATES

CRM Report Template is custom entity where you would create templates for reports/word/excel/email that you would like to make available for Click2Export.

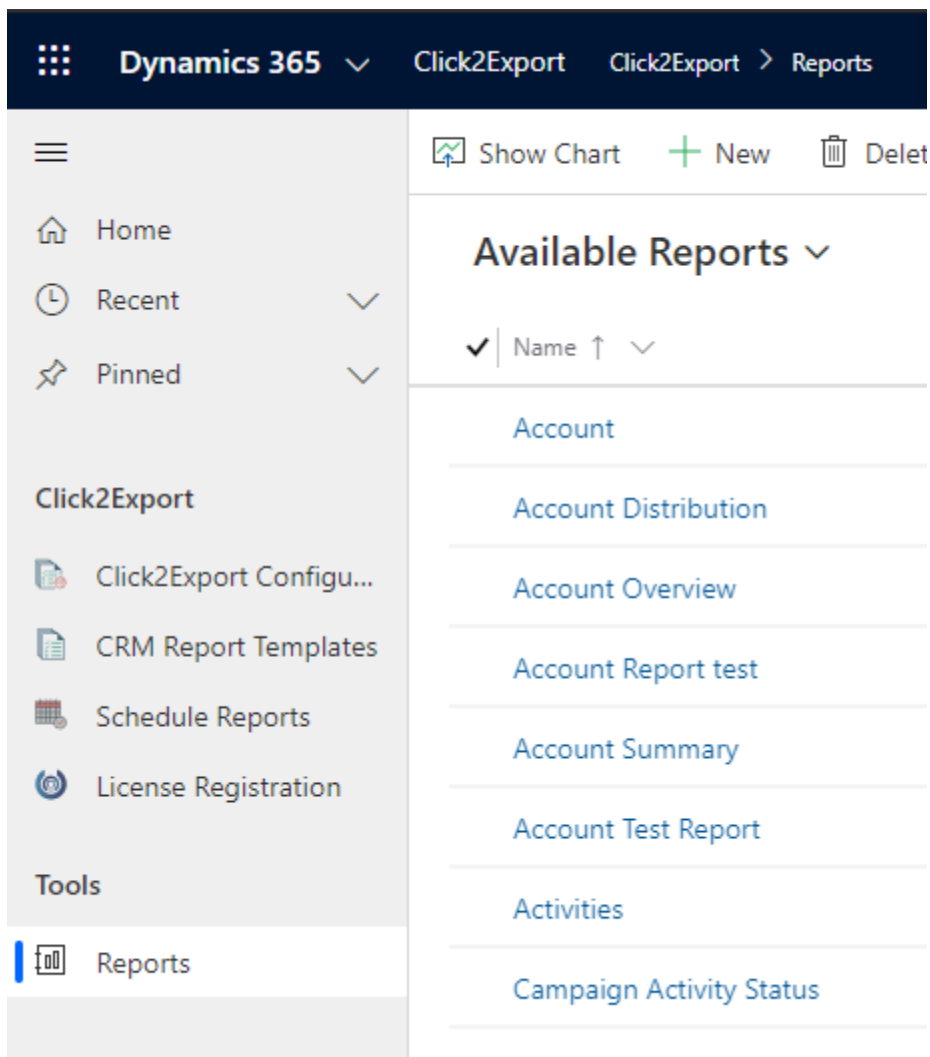
There are four types of CRM Report Template.

- I. **SSRS Template**
- II. **Word Template**
- III. **Excel Template**
- IV. **Email Template (CRM Views Data)**

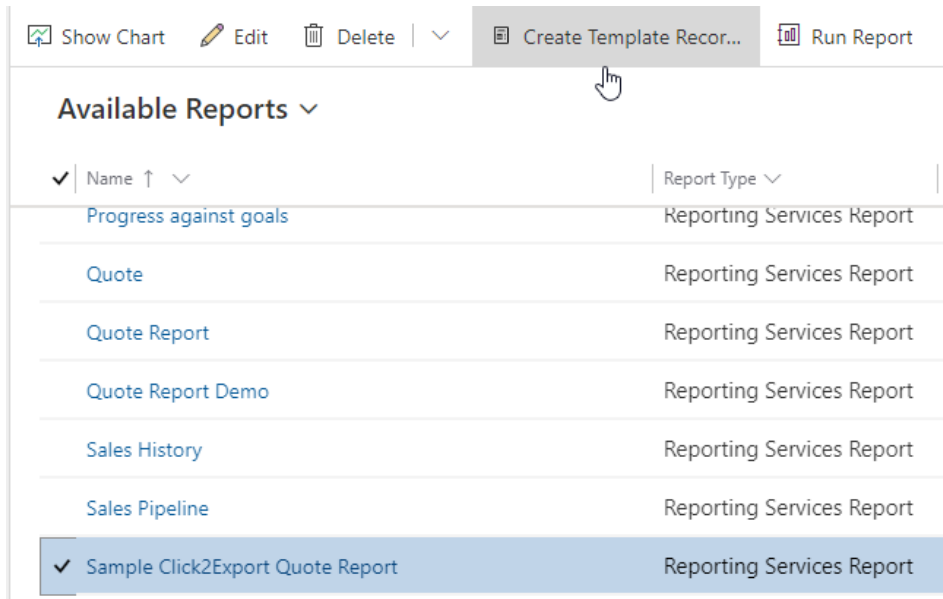
I. SSRS Template:

This section will guide you through the process of creating CRM Report Template for SSRS Reports.

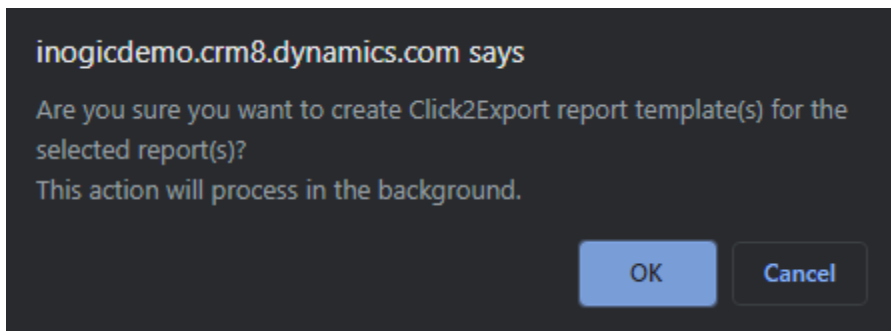
Open Click2Export App and then select Reports.



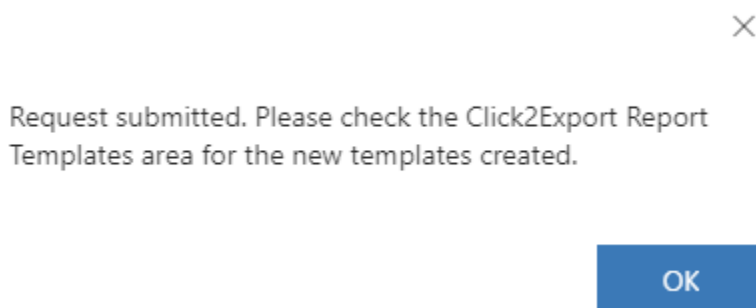
Select the reports that need to be used for quick export using Click2Export then click on Create Template Record button from the ribbon.



A confirmation dialog box will appear --> Click on OK.



The 'Create Template Records' submits a background job to create records. This allows you to continue with your work till all the templates have been created. Once it is done the following message would be displayed the following message. Click on OK.



You can check the report templates created in the CRM Report Templates Area added in Click2Export App --> CRM Report Templates.

Name ↓	Report Name	Record Type	Template T...	Created On
Sample Click2Export Quote Report	Sample Click2Export Quo...	quote	Report Te...	6/10/2020 11:33 AM
Quote-Quote Overview	---	quote	Word Tem...	6/6/2020 3:02 PM
Quote-All Quotes	---	quote	Email Tem...	6/6/2020 3:03 PM
Opportunity-Pipeline Management	---	opportunity	Excel Tem...	6/6/2020 3:07 PM

All the details in the template would be pre-populated based off the template selected at the time of CRM Report Template creation.

General:

Sample Click2Export Quote Report
CRM Report Template

General | Email Configuration | CRM Report Parameters | Related

Template Type *	Report Template	Report Name	Sample Click2Export Quote Report
Record Type *	Quote	Viewable By	Organization
Template Name *	Sample Click2Export Quote Report	Custom Report	<input checked="" type="checkbox"/>
Default File Format *	PDF	Auto Send Email	<input type="checkbox"/>
Export File Name *	Sample Click2Export Quote Report - {customerid} - {today}	Default Email Template	Account Reconnect
Date/Time Field Format	dddd, dd MMMM yyyy	Default Filter	<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">

Template Type: Report Template. This cannot be changed for SSRS Report Template.

Template Name: By default, this is set to the corresponding report name but is customizable and can be changed. This name is displayed for Report selection in the Click2Export Window. Hence, it should be unique and easy to identify with, especially when you have multiple templates for the same report.

Default File Format: PDF, Excel, Word, CSV and TIFF are the options. By default, with the solution it is set as PDF. With this option you can decide the default format in which the report would be exported.

Export File Name: This is the name that would be provided to the file generated upon export. You could provide a static name or dynamic name (based on a field of the record).

For e.g. Template Name – {customerid} – {today}

It will create a file name as: Sample Click2Export Quote Report - Wayne Industries - Friday, 26 March 2021

You can use any field name including custom field from the record type provided & today, to get today’s date.

DateTime Field Format: This field decides in what format Date & Time should be represented while exporting the report if Export File Name contains a DateTime field. It should have a valid DateTime format for e.g. - mm/dd/yyyy for 03/23/2021, mm/dd/yyyy h:mm tt for 03/23/2021 5:50 AM. It will reflect the Date & Time field format as Logged-In user's settings if this field is left blank.

Auto Send Email: If enabled, it sends email automatically with the attached exported file, while performing the action from Click2Export UI or else it'll open up the Email Window with all the necessary details populated and then you can hit send manually.

Default Email Template: The email would be created based on the default email template specified in that section. If left blank, the Email body would be empty.

Default Filter: It contains the default fetch XML of template.

Email Configuration:

The next section is 'Email Configuration'. To know more about this section, please click [here](#).

Report, CRM Report

CRM Report Template

General **Email Configuration** CRM Report Parameters Related

From:	Me		
To:	Users	* Ross #	Advance
Cc:			Advance
Bcc:			Advance

CRM Report Parameters:

This will list down all the parameters that needs to be supplied for the report to render.

- II. **Word Template:** To create the word template you need to navigate to **New > CRM Report Template**.

STEPS TO CREATE WORD TEMPLATE:

This section will guide you through the process of creating CRM Report Template for Word Templates.

Navigate to Click2Export App > CRM Report Templates > New.

Fill the relevant details in the New CRM Report Template.

General:

Account - Account Summary
CRM Report Template

General | Email Configuration | Related

Template Type	Word Template
Record Type	Account
Word Template	Account Summary
Template Name	Account - Account Summary
Default File Format	PDF
Export File Name	Account Summary - {accountid} - {createdon} - {today}
Date/Time Field Format	dddd, dd MMMM yyyy

Auto Send Email	<input type="checkbox"/>
Default Email Template	---

Template Type: Select Word Template.

Record Type: Entity for which you want to create the CRM Report Template.

Word Template: All the word templates will be available for selection.

Template Name: By default this is set to the corresponding report name but is customizable and can be changed. This name is displayed for Report selection in the Click2Export Window and should therefore be unique and easy to identify with especially when you have multiple templates for the same report.

Default File Format: For this, two options are available - PDF & Word. By default with the solution it is set as PDF. With this option you can decide the default format in which the report would be exported.

Export File Name: This is the name that would be provided to the file generated upon export. You could provide a static name or dynamic name (based on a field of the record). For eg. Account Summary – {accountid} – {createdon} - {today}

This will create a file name as: Account Summary – A. Datum Corp – Thursday, 12 February 2015 - Monday, 22 March 2021

You can use any field name including custom field from the record type provided.

Date/Time Field Format: This field decides in what format Date & Time should be represented while exporting the report if Export File Name contains a Date/Time field. It should have a valid Date/Time format for e.g. - mm/dd/yyyy for 03/23/2021, mm/dd/yyyy h:mm tt for 03/23/2021 5:50 AM. It will reflect the Date & Time field format as Logged-In user’s settings if this field is left blank.

Auto Send Email: Send emails automatically with the attached exported file.

Default Email Template: The email would be created based on the default email template specified in that section.

Email Configuration:

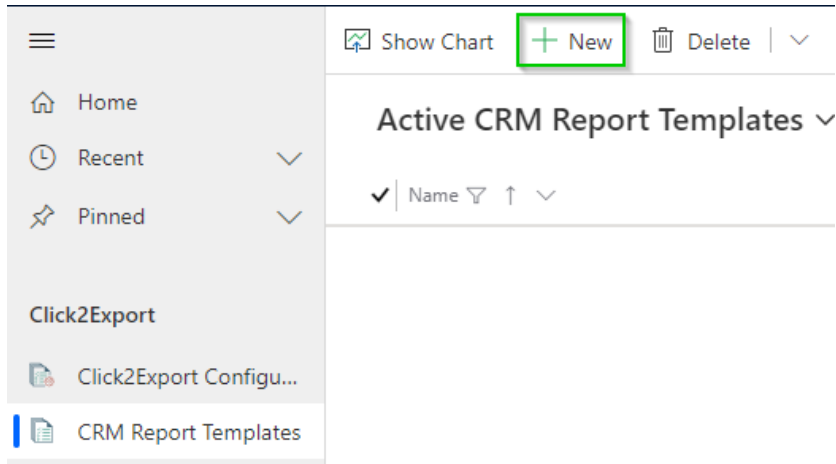
The next section is 'Email Configuration'. To know more about this section, please click [here](#).

III. EXCEL TEMPLATE

STEPS TO CREATE EXCEL TEMPLATE:

This section will guide you through the process of creating CRM Report Template for Excel Template.

Navigate to Click2Export App --> CRM Report Templates --> New.



Fill the relevant details in the New CRM Report Template and save it.

General:

The screenshot shows the configuration form for a CRM Report Template titled 'Opportunity - Pipeline Management'. The form is divided into two sections: 'General' and 'Email Configuration'. The 'General' section includes fields for:

- Template Type: Excel Template
- Record Type: Opportunity
- Excel Template: Pipeline Management
- Template Name: Opportunity - Pipeline Management
- Default File Format: Excel
- Export File Name: Pipeline Management (today)
- Date/Time Field Format: dddd, dd MMMM yyyy HH:mm:ss

 The 'Email Configuration' section includes:

- Auto Send Email:
- Default Email Template: ---

Template Type: Excel Template. If Excel Template is not available. Please enable it from [here](#).

Record Type: Entity for which you want to create the CRM Report Template.

Excel Template: All the excel templates from the document template entity will be available for selection.

Template Name: By default this is set to the corresponding report name but is customizable and can be changed. This name is displayed for Report selection in the Click2Export Window and should therefore be unique and easy to identify with especially when you have multiple templates for the same report.

Default File Format: Once you select the Excel template type the default file format is set as Excel.

Export File Name: This is the name that would be provided to the file generated upon export. You could provide a static name or dynamic name (based on a field of the record).

DateTime Field Format: This field decides in what format Date & Time should be represented while exporting the report if Export File Name contains a DateTime field. It should have a valid DateTime format for e.g. - mm/dd/yyyy for 03/23/2021, mm/dd/yyyy h:mm tt for 03/23/2021 5:50 AM. It will reflect the Date & Time field format as Logged-In user's settings if this field is left blank.

Auto Send Email: If enabled, it sends email automatically with the attached exported file, while performing the action from Click2Export UI or else it'll open up the Email Window with all the necessary details populated and then you can hit send manually.

Default Email Template: The email would be created based on the default email template specified in that section. If left blank, the Email body would be empty.

Email Configuration:

The next section is 'Email Configuration'. To know more about this section, please click [here](#).

Account - Account Summary - Email
CRM Report Template

General **Email Configuration** Related

From:	Me		
To:	Users	× AccountId	Advance
Cc:	Team	× Process_Team	Advance
Bcc:			Advance

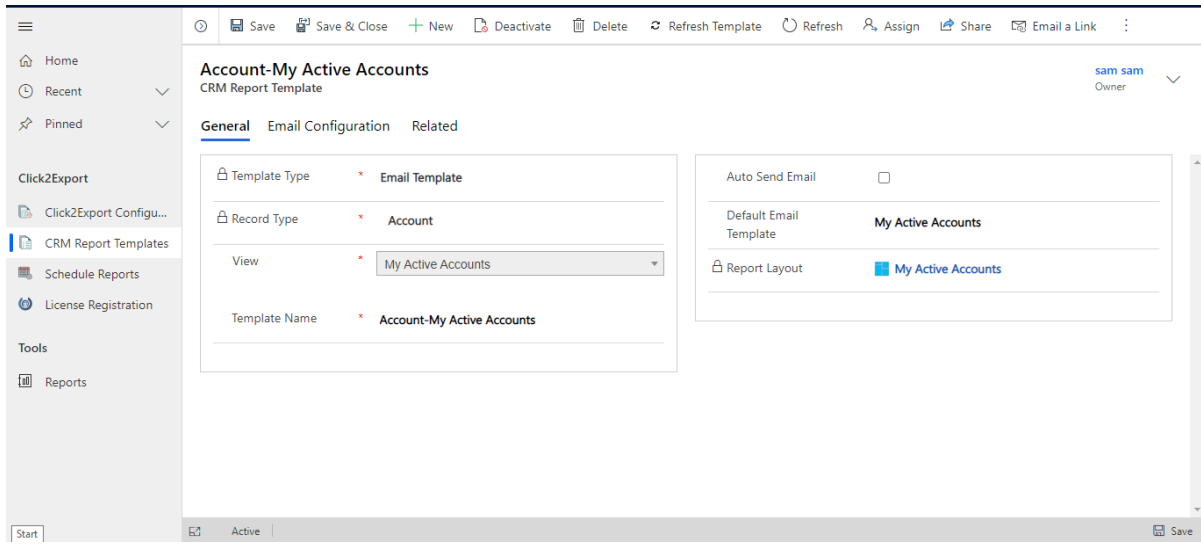
IV. Email Template (CRM Views Data)

Email template pertains to particular 'VIEWS' i.e. All Accounts, My Active Accounts, etc. This option enables you to embed the data of records of any selected view in tables within email body and send it to respective recipients. It does not adhere to a record or set of records.

This section will guide you through the process of creating CRM Report Template for Email Template.

In order to create Email Template navigate to Click2Export App --> CRM Templates --> New.

General:



Template Type: Select 'Email' template.

Record Type: Select any record. Here, 'Account' is selected. Once record is selected a new field 'View' will appear.

View: Select respective 'View'. Here, 'My Active Accounts' view is selected.

Template Name: It is automatically populated once 'Record Type' and 'View' is selected.

Auto Send Email: Enable the field if you want to auto send emails and save it.

Default Email Template: If necessary, select any default email template and save the template.

Report Layout:

This field appears only after saving the template. Here, new report layout can be created. Now, duly fill the following fields and save it.

Click2Export - User Manual

The screenshot displays the Click2Export application interface. At the top, there is a menu bar with options: Save, Save & Close, Deactivate, Delete, Refresh, Assign, Share, Email a Link, Flow, Word Templates, and a settings icon. Below the menu bar, the main content area is titled 'My Active Accounts' with a subtitle 'Report Layout'. On the right side, there is a user profile for 'sam sam' (Owner) and a link to 'Account-My Active Accounts CRM Report Template'. The 'Report Layout Properties' section is active, showing a table with the following data:

Report Title	My Active Accounts till {now}	Show Total	Yes
Auto Width	No	Link to Open Record	Yes
		Record Link Label	Link Of Record

Below this, the 'Column & Group Properties' section is visible, divided into 'Column Properties' and 'Group Properties'. The 'Column Properties' table shows a column named 'Primary Contact' with properties for Display Name, Order, Width (px), and Alignment. The 'Group Properties' table shows a group named 'Address 1: City' with properties for Display Name, Group Header Text, and Group Footer Text.

Report Title: Give name to the report that is to be displayed at the top of table (in email body). You can also use date in the report title. For example, My Active Report {now | "MM/dd/yyyy"}.

Show Total: Select yes or no. If you enables till this, then total row will be visible in table.

Auto Width: If this field is set to 'Yes' then width for all columns will be set as 'auto' i.e. the column width will depend upon the content of column. This setting will override the width which is specified in column property or selected view. If it is set to 'No' then width of column will be set as per the column property and if this is also not created then width will be taken from View.

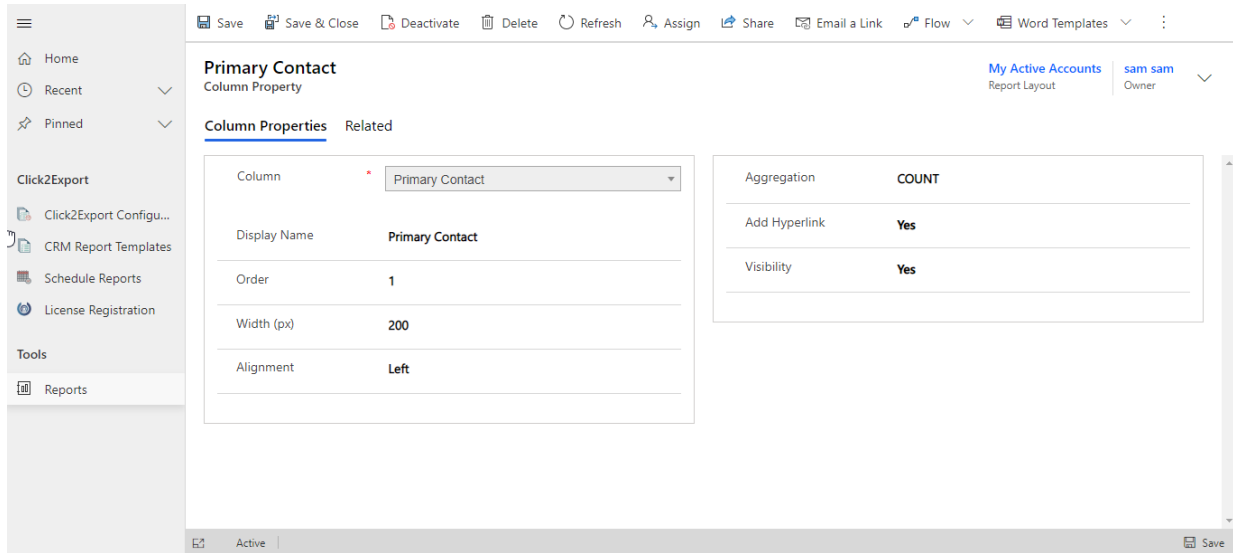
Link to Open Record: If this field is set to 'Yes' then 'Record Link' column will be visible in table otherwise it will be hidden.

Record Link Label: Give appropriate name to the column. Here, if the field is kept blank then by default the column name will be taken as 'Record Link'.

Column Properties:

Here, the column properties can be customized as per requirement. You can select the column, its width, alignment, aggregation, etc.

Click2Export - User Manual



Display Name: Give appropriate display name for the column.

Order: Here, you can specify the order for columns to set position in exported table.

Width: Here, you can set width of column in pixel. It will override the width specified in view.

Alignment: This field allows you to change the alignment for column – Left, Right, and Center.

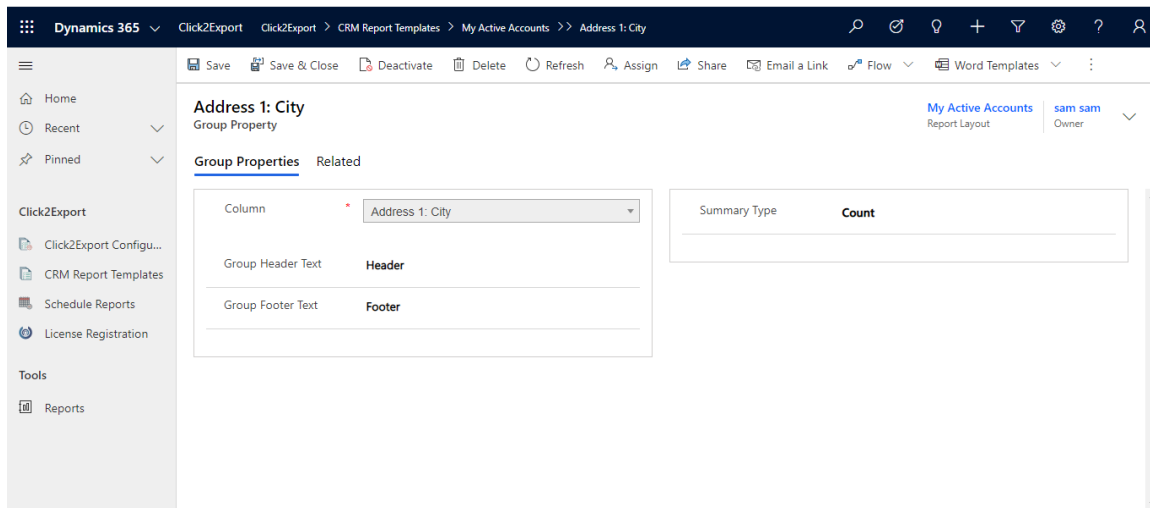
Aggregation: This field will enable you to summarize or get total of any column. Here, you will get the following options depending upon the field type of selected column - Count, Min, Max, Average, Sum.

Add Hyperlink: This will make that column to hyperlink of that record. It is available only for lookup, customer and URL type of field.

Visibility: If this field is set to 'No' then the column will not be visible in exported table.

Group Properties:

This section allows you to group the data in the table. You can create a maximum of two groups.



Group Header Text: Here, you can add text for header of group column.

Group Footer Text: In this field you can add text for footer of group column.

Summary Type: If this field is set as 'Count' then count summary will be shown in the table for that group of column.

Design & Preview:

Now, 'Design & Preview' tab is where you can change the format of table in terms of font, color, table background, header, footer, etc.

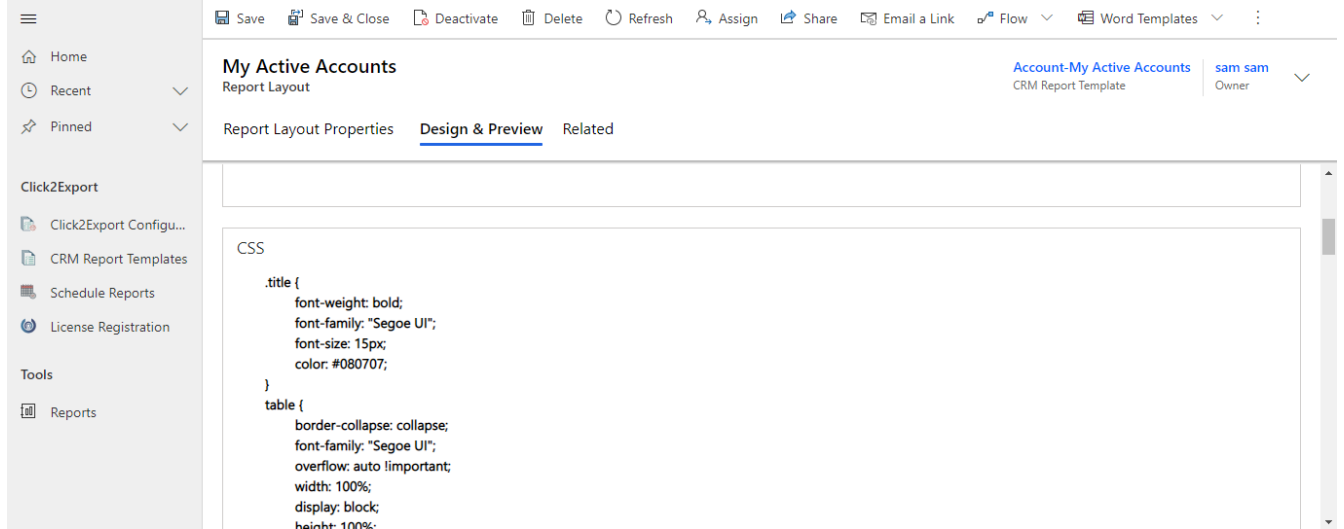
Here, you will have 4 themes to choose from - Default, Green, Orange and Simple Black. Further, you can also customize the table as per your requirement. If you change anything for any property it will be reflected in preview in real time. So, you can either use below design option or css field is also open. You can add/remove/update css in that field.

The screenshot shows the Dynamics 365 Click2Export interface. The top navigation bar includes 'Dynamics 365', 'Click2Export', and 'CRM Report Templates'. The main area is titled 'My Active Accounts' and is in the 'Design & Preview' tab. On the left, there are settings for 'Theme & Design' (Default Theme), 'Table Properties', 'Font' (Segoe UI), 'Border' (#CFCDCC), 'Background' (white), 'Cell Padding' (Horizontal: 5, Vertical: 1), and 'Separate Border'. On the right, the 'Preview' section shows a table titled 'My Active Accounts till 02-07-2020 19:52' with columns: Link Of Record, Account Name, Primary Contact, and Main Phone. The table contains 12 rows of sample data.

Link Of Record	Account Name	Primary Contact	Main Phone
Open	A. Datum Corporation (sample)	Rene Valdes (sample)	555-0158
Open	Adventure Works (sample)	Nancy Anderson (sample)	555-0152
Open	Alpine Ski House (sample)	Paul Cannon (sample)	555-0157
Open	Blue Yonder Airlines (sample)	Sidney Higa (sample)	555-0154
Open	City Power & Light (sample)	Scott Konersmann (sample)	555-0155
Open	Coho Winery (sample)	Jim Glynn (sample)	555-0159
Open	Contoso Pharmaceuticals (sample)	Robert Lyon (sample)	555-0156
Open	Fabrikam, Inc. (sample)	Maria Campbell (sample)	555-0153
Open	Fourth Coffee (sample)	Yvonne McKay (sample)	555-0150
Open	Litres, Inc. (sample)	Susan Stubbard (sample)	555-0151

CSS Field:

Click2Export - User Manual



Email Configuration:

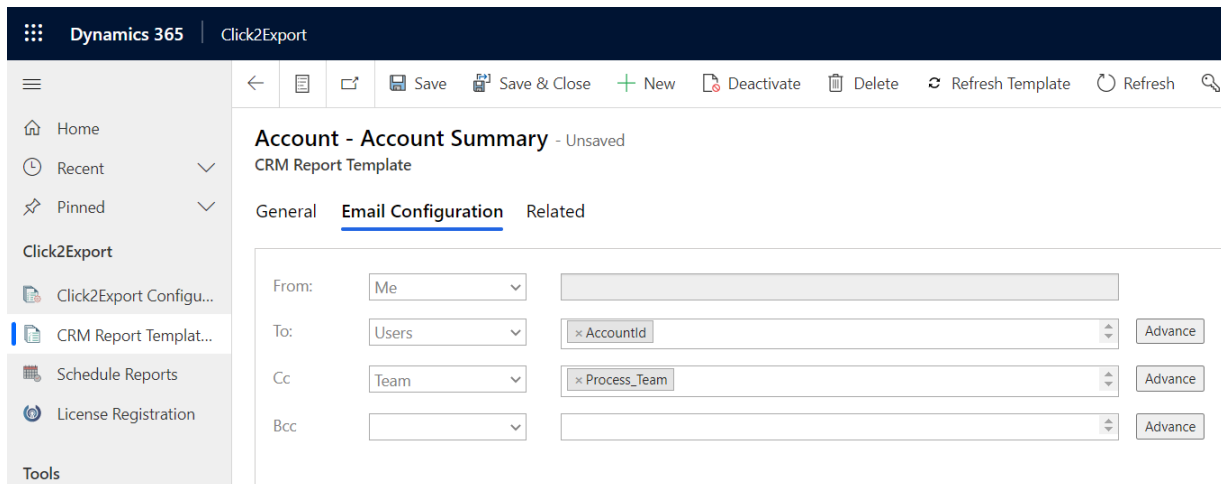
The next section is 'Email Configuration

Email Configuration

Email Configuration is common for all the templates. It allows you to configure Email Sender as well as the Email Recipients for the respective CRM Report Template.

Given below are the details to configure emails as per your requirement:

After saving the details in General section of CRM Report Templates, go to Email Configuration section and fill the following fields.



From – The sender i.e. the person who wants to send the email.

To – Recipient i.e. the person to whom the email is to be sent.

CC – Carbon Copy i.e. the person to whom you want to send copy of the email information.

BCC – Blind Carbon Copy i.e. if you are sending the Copy and you do not want the other recipients to see that you sent it to the particular contact

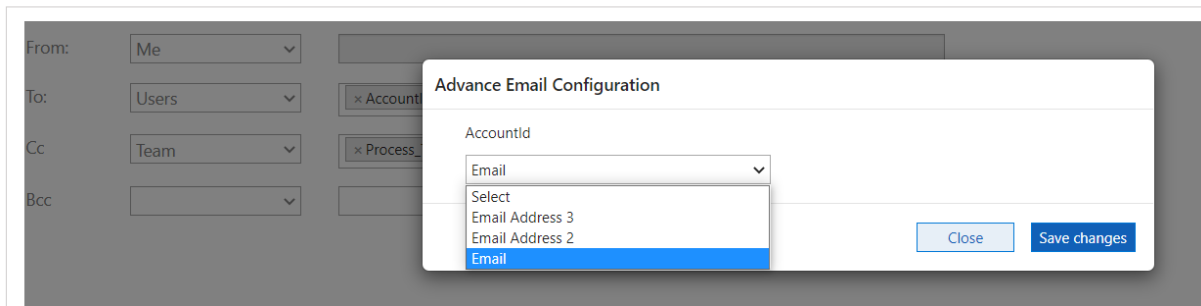
Types of Email addresses you can select from:

- 1.Users – If you select Users then all the CRM users present in the environment will be enlisted while selecting the data.
- 2.Queue – If you select Queue then all the queues present in the environment will be enlisted while selecting the data.
- 3.Team – If you select Team then all the teams created in the environment will be enlisted while selecting the data.
- 4.Dynamic – E.g. If you have selected quote as an entity then all the lookup fields on quote which are allowed to send email will be enlisted while selecting the data.
- 5.Manager – E.g. If you have selected quote as an entity then, all the system-user lookup fields on quote entity will be enlisted while selecting the data, and recipient would be the manager of the selected data.

Advance Button - Usually, emails are sent to primary Email Id of the recipients. In case there is more than one Email ID in contact information, this button will give you the option to select the Email ID to which the mail has to be sent. It can either be a Primary Email ID or any other secondary Email ID.

Account - Account Summary - Unsaved
CRM Report Template

General Email Configuration Related



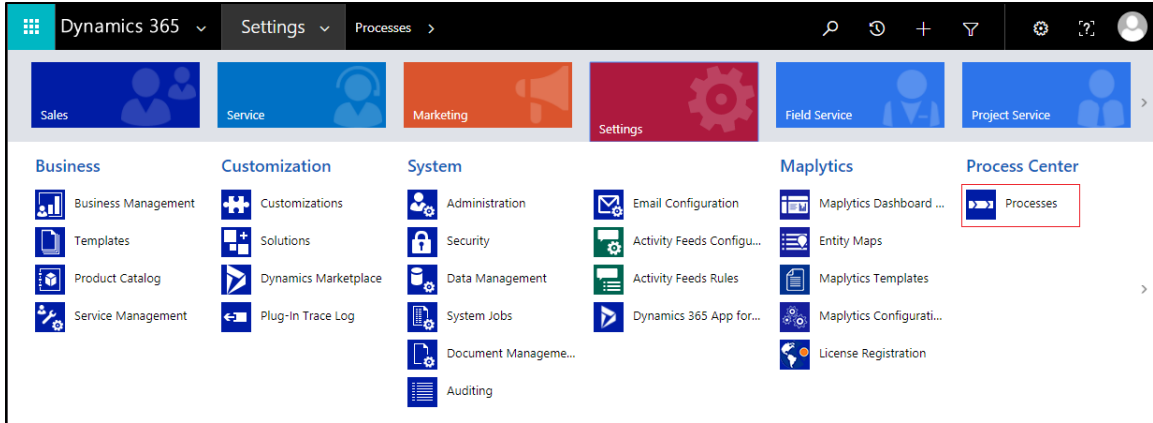
Note: For Email and Excel template Dynamic and Manager option is not available.

CREATE CLICK2EXPORT WORKFLOW – WORD TEMPLATES & REPORTS

WORD TEMPLATES

1. Click2Export now supports exporting the Dynamics CRM Word Templates using Click2Export workflow. To create a workflow, navigate to **Settings > Processes** and click on **'New'** to create a new workflow.

Click2Export - User Manual



2. Enter the **'Process Name'**, select the **'Category'** as **'Workflow'** and **'Entity'** for which you want to create this workflow. Click on **'OK'**.

The 'Create Process' dialog box is shown. It contains the following fields and options:

- Process name:** Click2Export Quote Template Workflow
- Category:** Workflow
- Entity:** Quote
- Run this workflow in the background (recommended)
- Type:** New blank process, New process from an existing template (select from list):
- A table with columns: Template Name ↑, Primary Entity, and Owner.
- Properties** button
- OK** and **Cancel** buttons.

3. Here you can select whether you want the Workflow to be On Demand or trigger on a change of Options for Automatic Processes.

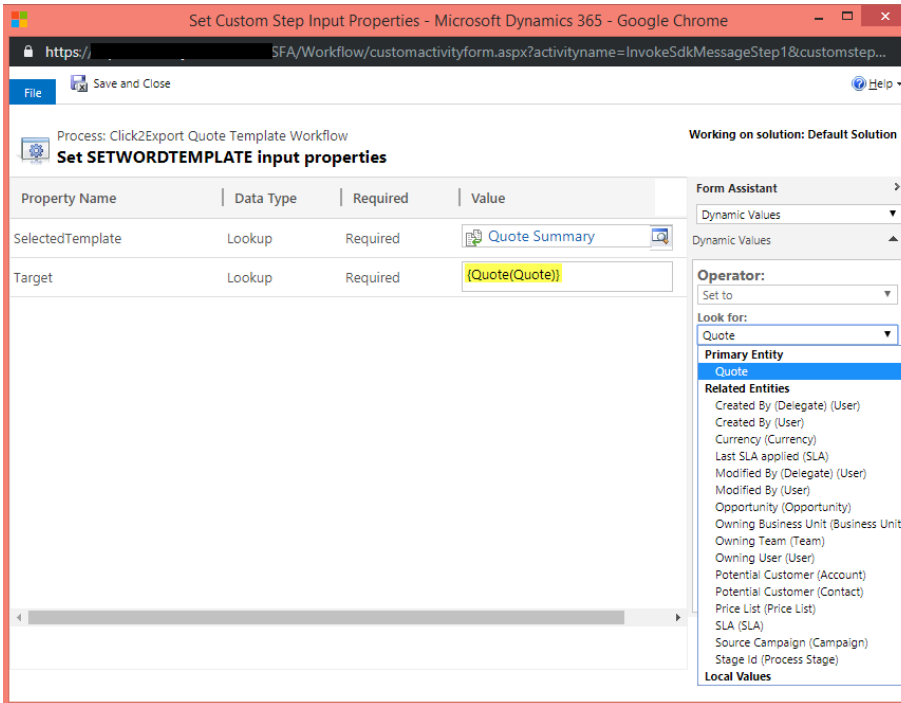
The 'Options for Automatic Processes' dialog box is shown. It contains the following fields and options:

- Process Name:** Click2Export Quote Template Workflow
- Activate As:** Process
- Entity:** Quote
- 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:** Record is created, Record status changes, Record is assigned, Record fields change (with **Select** button), Record is deleted
- Scope:** Organization
- Start when:** (checkboxes for Record is created, Record status changes, Record is assigned, Record fields change, Record is deleted)

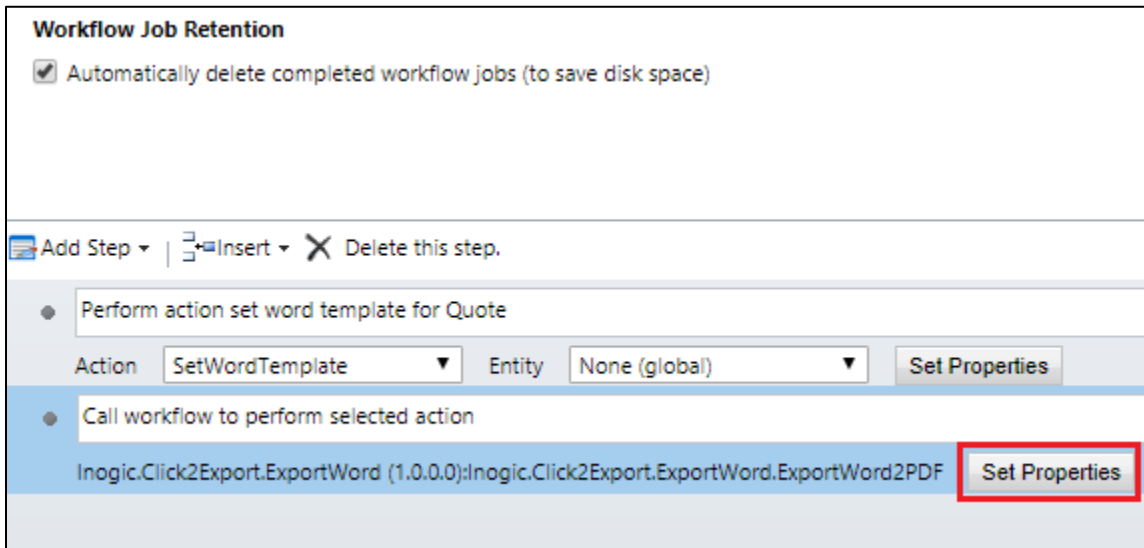
4. First user needs to click on **'Add Step'** and add **Perform Action** step that is predefined by Microsoft to select the appropriate Action for required word template. Select **Action** as **SetWordTemplate** option and **Entity** as **None (global)**.

5. Now click on **'Set Properties'** of **Perform Action** step and select the required Word Template in **SelectedTemplate** section and required **Entity** in **Target** section. In order to select the required entity in Target section, it should have Business Process Flows ticked in the entity settings like shown below:

Click2Export - User Manual



- Click2Export ships with one workflow assembly namely **'Inogic.Click2Export.ExportWord.ExportWord2PDF'**. This step is required to call the workflow for performing the selected action.
- Now click on **'Set Properties'** for **Inogic.Click2Export.ExportWord.ExportWord2PDF**



- Now on the **'Document Template'** select required **'MS Document Template'** from the drop down options. In CRM Report Template select the required **'CRM Word Template'** for the selected entity.
- User can select the required action i.e. **Attach as a Note, Attach to an Email** or **Upload to SharePoint** as **True** for performing the workflow accordingly and click on **'Save and Close'**.

Click2Export - User Manual

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

Document Template: Select the document that needs to be converted to PDF.

CRM Report Template: This will be the Report Template that has been created for the Document Template selected above.

Attach as a Notes: If marked as True, then it will attach the converted PDF against the record as a Note else it will not.

Attach to an Email: If marked as True, then it will attach the converted PDF in an email. The Email Recipients and the Sender would be selected based off the Email Configuration done on the selected CRM Report Template.

10. Now **'Save'** and then **'Activate'** the process.

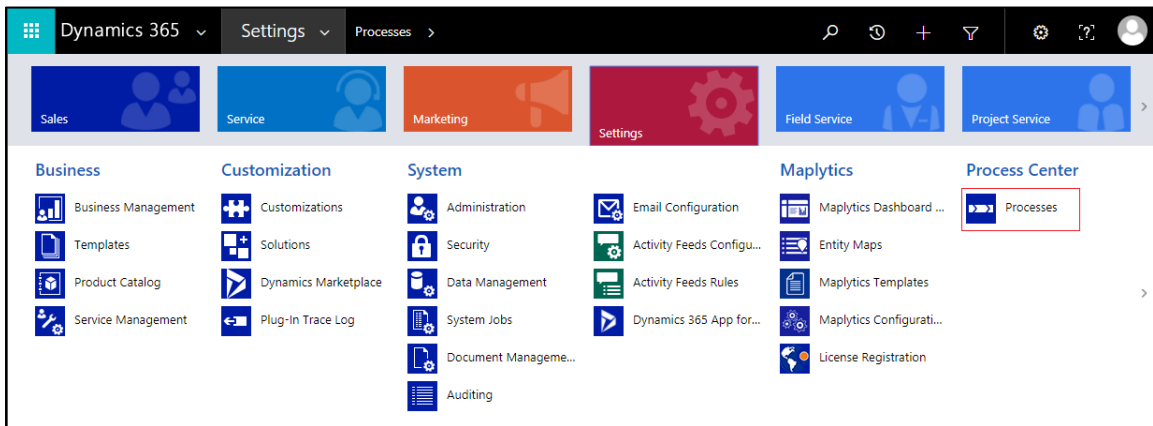
11. You can now see the workflow in **'My Processes'**.

Process Name	Category	Primary Entity	Status	Created On	Modified On
Account Word Template Automation	Workflow	Account	Draft	10/30/2018 1...	10/31/2018 4...
Click2Export Quote Template Workflow	Workflow	Quote	Activated	10/31/2018 5...	10/31/2018 7...

SSRS TEMPLATE WORKFLOW

Click2Export - User Manual

1. Click2Export now supports exporting the Dynamics CRM Report Templates using Click2Export workflow. To create a workflow, navigate to **Settings > Processes** and click on **'New'** to create a new workflow.



2. Enter the **'Process Name'**, select the **'Category'** as **'Workflow'** and **'Entity'** for which you want to create this workflow. Click on **'OK'**.

The screenshot shows the 'Create Process' dialog box. The title is 'Create Process'. Below the title, there is a description: 'Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.' The form contains the following fields and options:

- Process name: * Click2Export Quote Report Workflow
- Category: * Workflow
- Entity: * Quote
- Run this workflow in the background (recommended)
- Type: New blank process, New process from an existing template (select from list):

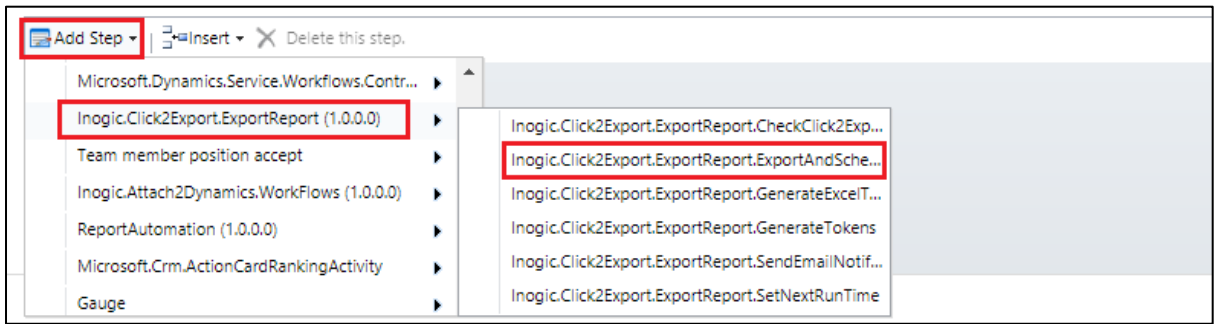
Below the form is a table with columns: Template Name ↑, Primary Entity, and Owner. The table is currently empty. At the bottom of the dialog, there are 'OK' and 'Cancel' buttons.

3. Here you can select whether you want the Workflow to be On Demand or trigger on a change of Options for Automatic Processes.

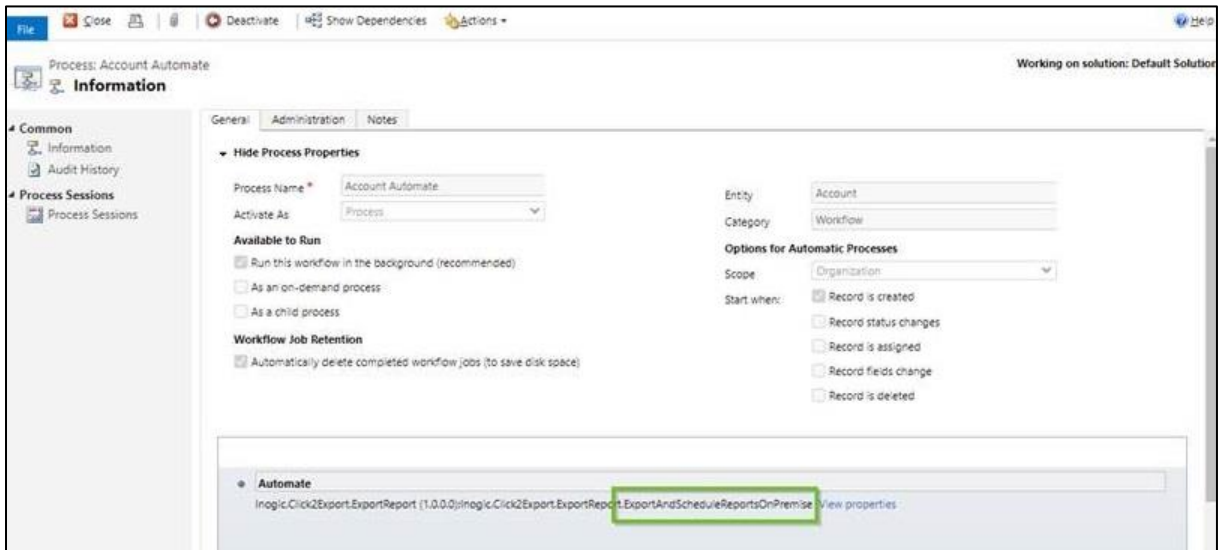
Click2Export - User Manual

The screenshot shows the 'Hide Process Properties' configuration window. The 'Process Name' is 'Click2Export Quote Report Workflow'. The 'Entity' is 'Quote' and the 'Category' is 'Workflow'. Under 'Available to Run', the 'Run this workflow in the background (recommended)' checkbox is checked. Under 'Workflow Job Retention', the 'Automatically delete completed workflow jobs (to save disk space)' checkbox is checked. Under 'Options for Automatic Processes', the 'Record is created' checkbox is checked, and a 'Select' button is visible.

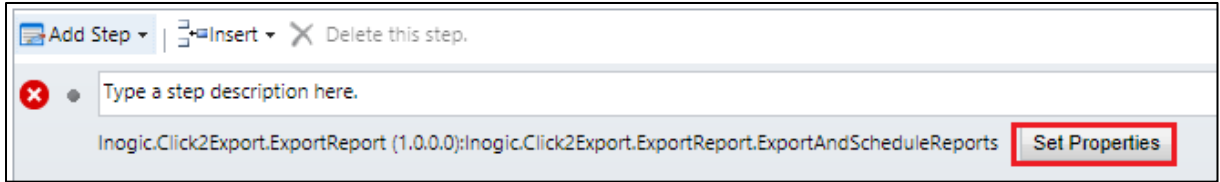
4. First user needs to click on **'Add Step'**. Click2Export ships with one workflow assembly namely **'Inogic.Click2Export.ExportReport.ExportAndScheduleReports'**. This step is required to call the workflow for performing the selected action.



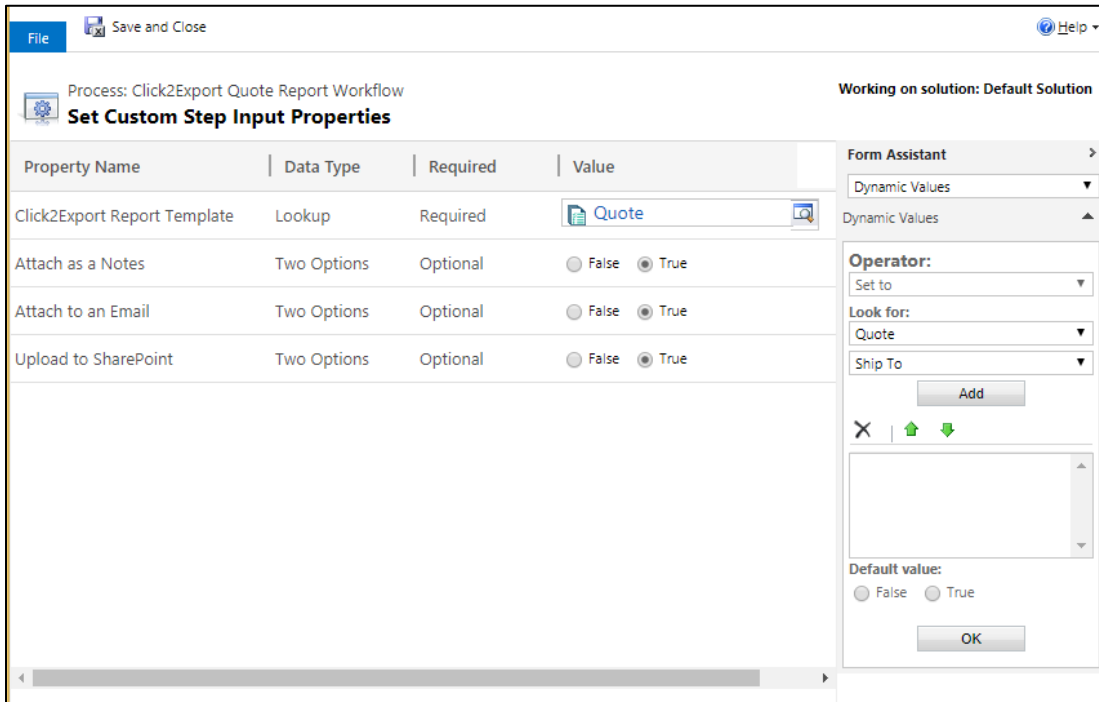
For **On-Premises**, the work flow assembly will be as follows:



5. Now click on **'Set Properties'** for **Inogic.Click2Export.ExportReport.ExportAndScheduleReports**



6. Now on the '**Click2Export Report Template**' select required '**Report Template**' from the drop down options.
7. User can select the required action i.e. **Attach as a Note**, **Attach to an Email** or **Upload to SharePoint** as **True** for performing the workflow accordingly and click on '**Save and Close**'.



CRM Report Template: CRM Report Template for the SSRS report that you want to be converted.

Attach as a Notes: If marked as True, then it will attach the converted file against the record as a Note else it will not.

Attach to an Email: If marked as True, then it will attach the converted file in an email. The Email Recipients and the Sender would be selected based off the Email Configuration done on the selected CRM Report Template.

Upload to SharePoint: If marked as True, the converted file will be uploaded against the record's respective SharePoint folder.

- For **On-Premises**, it will be as follows:

Click2Export - User Manual

Process: Account Automate
Working on solution: Default Solution

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Click2Export Report Template	Lookup	Required	All accounts
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 checked="" type="radio"/> True
Upload to SharePoint	Two Options	Optional	<input type="radio"/> False <input type="radio"/> True
Record Uri	Single Line of Text	Optional	Record URL(Dynamic(Account))

Form Assistant
Dynamic Values
Dynamic Values
Look for:
Account

- Now **'Save'** and then **'Activate'** the process.
- You can now see the workflow in **'My Processes'**.

My Processes

Search for records

<input type="checkbox"/>	Process Name ↑	Category	Primary Entity	Status	Created On	Modified On
<input checked="" type="checkbox"/>	Click2Export Quote Report Workflow	Workflow	Quote	Activated	7/9/2019 10:...	7/9/2019 10:...
<input type="checkbox"/>	Click2Export.ConverttoPDF	Action		Activated	7/3/2019 3:3...	7/17/2019 10:...
<input type="checkbox"/>	Click2Export.CreateCRMReportTemplate	Action		Activated	7/3/2019 3:3...	7/17/2019 10:...

CLICK2EXPORT CONFIGURATION

You can set the default settings to be used for Click2Export here.

Click2Export

Click2Export Configuration

Configuration SharePoint Details Related

Default File Format	* PDF
Allow Templates	All
Allow Individual Templates	Both
Allow Multiple Templates	Yes
Allow Individual Report Templates?	Yes
Default Theme	My theme.css
Client Id	ca34aa1f-f470-4c4e-b011-b7ca5f8dd595
Secret Key	ZZZZ TVGLJ NLXAE XHBEG QABSF WCREN WVEDX UGJVM TITVP TFATC HXIFI

Click2Export

Click2Export Configuration

Configuration SharePoint Details Related

User Name	
Password	
Overwrite File	No

The 5 configuration options you have in **Configuration** are as follows,

By default, it is set as **YES**.

Default File Format – PDF, Excel, Word, CSV and TIFF are the options. By default, with the solution it is set as **PDF**. With this option you can decide the default format in which the report would be exported.

Allow Templates –This option will allow the user to create new CRM Report Template for word, excel and email templates. The user can select word, excel, email or all of them as per their requirement. If the user selects excel then it is necessary to **set credentials** and **generate token**. Otherwise, the excel template will not work.

Allow Individual Templates: This option allows you to decide whether CRM Report Templates can be created for Individual/Personal template for both word and excel.

Allow Multiple Templates –This option allows you to decide whether you want to allow users to create more than one CRM Report Template for a single report.

Allow Individual Report Templates –This option allows you to decide whether CRM Report Templates can be created for Individual reports i.e., reports where viewable by is set as Individual. By default, it is set as **NO**.

Default Theme: The CSS file you've uploaded to be used as default theme while exporting CRM views data.

Client Id: Client ID you've generated while creating Azure App [here](#).

Secret Key: Secret Key you've generated while creating Azure App [here](#).

Note: Once a CRM Report Template is created, it is accessible to all users in the organization and anybody can export that report. So set these values accordingly.

SharePoint Details: User needs to fill the relevant details of the logged in user so as to make the option available of uploading the exported file on their SharePoint.

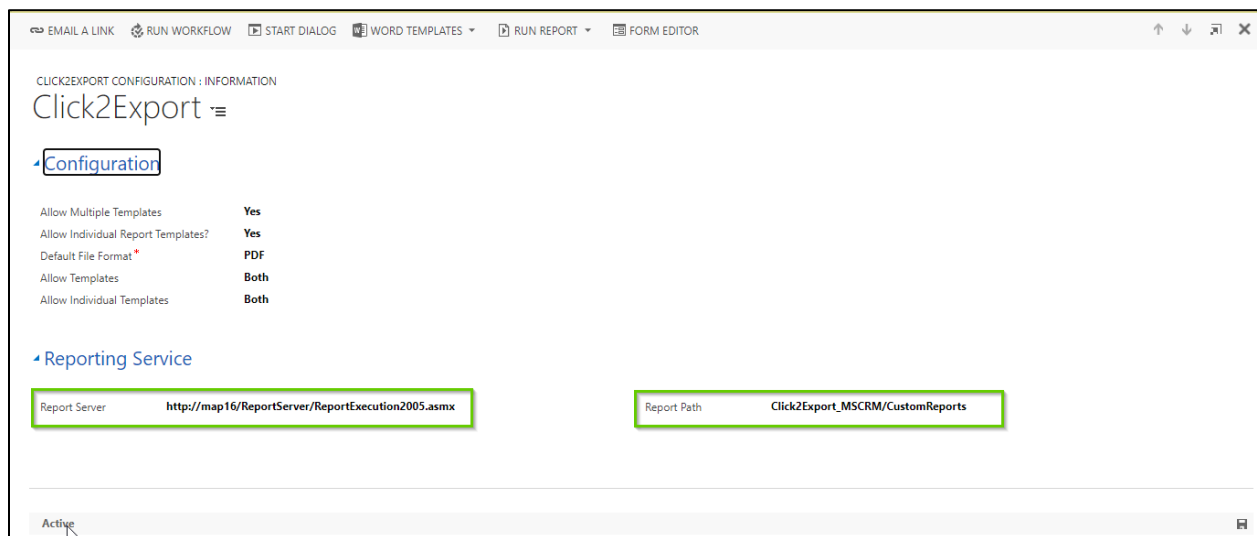
The 3 options you have in SharePoint Details are as follows,

User Name: The user name of the SharePoint site.

Password: Password of the SharePoint site which gets encrypted to the code language.

Overwrite File: If it is set to **Yes** then already existing file on SharePoint would be overwritten by current file otherwise the file name will be appended with the current date and time.

Note: For on-premises, below configuration is necessary to export SSRS report using Click2Export.



Reporting Server: http://<domain-name>/ReportServer/ReportExecution2005.asmx

Report Path: <environmentname>_MSCRM/CustomReports

CLICK2EXPORT SECURITY ROLES

Click2Export ships with 2 security roles targetted at Administrator and User.

1. Click2Export Administrator
2. Click2Export User

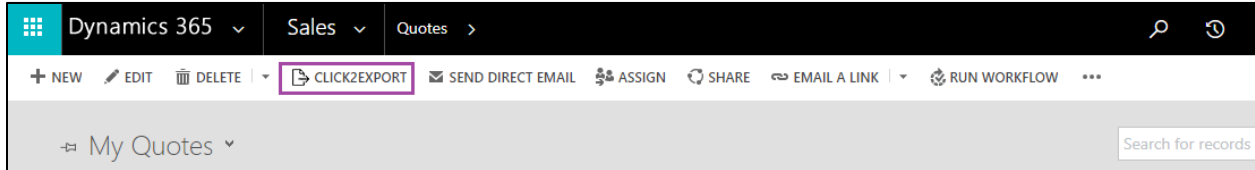
Only users with **Click2Export Administrator** role will be allowed to “**Create Report Templates**” and edit the CRM Report Templates. Configurations too can be managed by the Administrators only.

For users that would use the Click2Export functionality you need to assign the Click2Export User Role. They will only be able to export the reports.

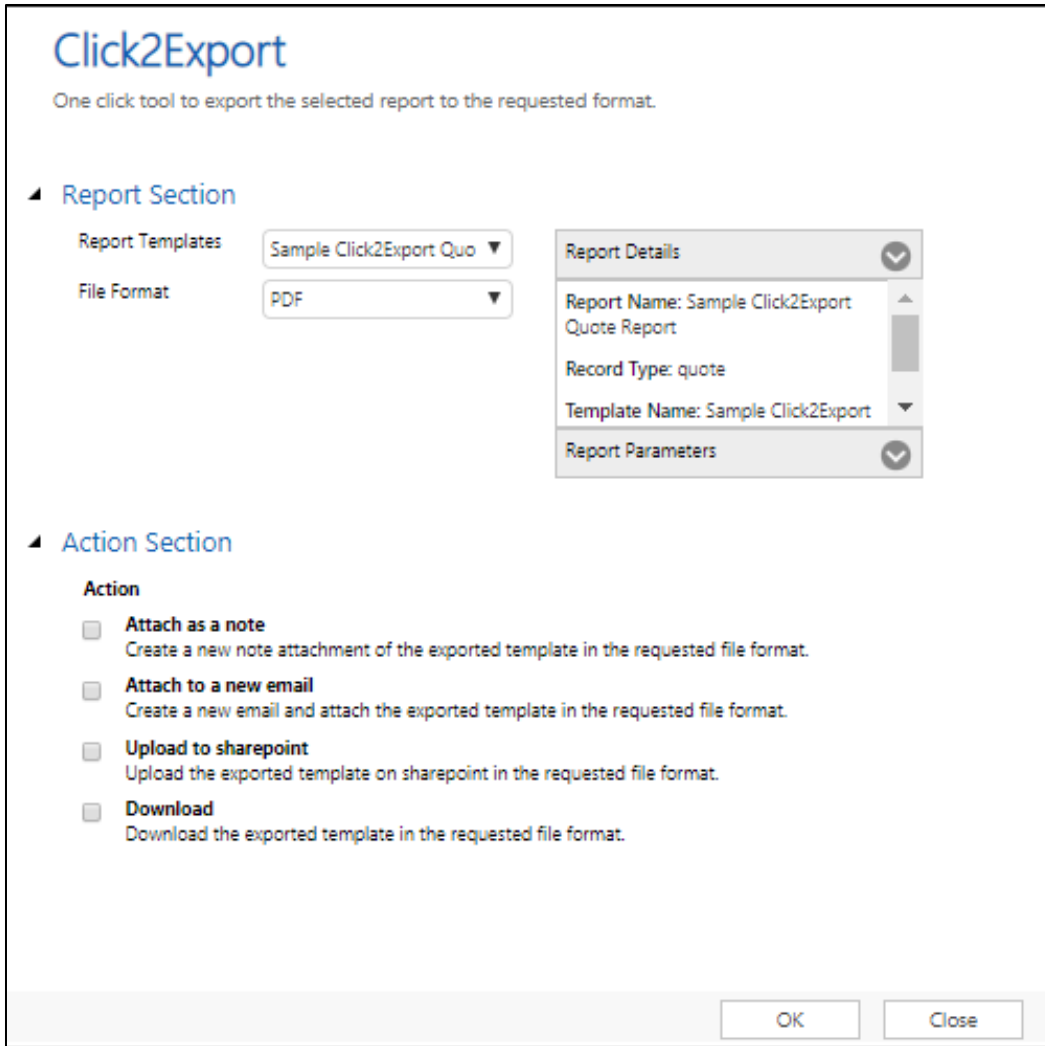
EXPORT REPORT

Export Word Template

Click2Export is easily accessible through the ribbons on the home page as well as entity forms.



You can select single or multiple records from the home grid and click on Click2Export button to invoke the Click2Export window as shown below. In case of export of excel templates, the Click2Export button is visible on the home grid without the selection of any records. The reason being that excel template is VIEW based and do not pertain to particular record(s).



Report Templates – This will list out all the CRM Report Templates created for that selected entity record.

Selection Mode – This option appears only when you select multiple records from the entity grid and click on Click2Export button. This has two option Per Record and Combine.

Note:

1. For word template only per record option is available and for report template both the options i.e., per record and combine are available.
 - a. If Per Record is selected then the report will be exported per selected record i.e., 1 exported report file per selected record.
 - b. If Combine is selected then one single report will be exported, combined for all the selected records.

2. For word/excel template, Report Details will not be available. If you select Report Template type in Report Template then you will get the Report Details and Report Parameters table in right side.

Report Details – The Report Details pane provides details of the selected report template.

Report Parameters–The parameter values set by default will be seen here and you can change them run time as well, so that with those values the report is executed and exported.

File Format – You can choose the type of file format the report should be exported to. The options currently supported are PDF, MS Excel, MS Word, TIFF, and CSV.

Note:

1. For Report Template type all **5 types of file formats** are available to select. I.e., PDF, MS Excel, MS Word, TIFF, and CSV.
2. For Word Template type user can select only **2 file formats** i.e., PDF and Word type.
3. For Excel Template only **one file format** is available i.e., Excel.
4. If the user wants to set the mostly used file format say PDF then they can define it in [Click2Export Configuration](#) and set that in Default file format.
5. If user have set the Default File Format as Word in Click2Export Configuration and Default File Format for particular CRM Report Template as PDF, then the default file format populated on Click2Export window will be set as given in the selected CRM Report Template.

Action Section

Click2Export allows users to perform the following four different actions with the exported reports:

Click2Export

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

Report Section

Report Templates Account - Account Summi

File Format PDF

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.

Choose Template

Account Reconnect

Auto Send Email

Upload to sharepoint
Upload the exported template on sharepoint in the requested file format.

Download
Download the exported template in the requested file format.

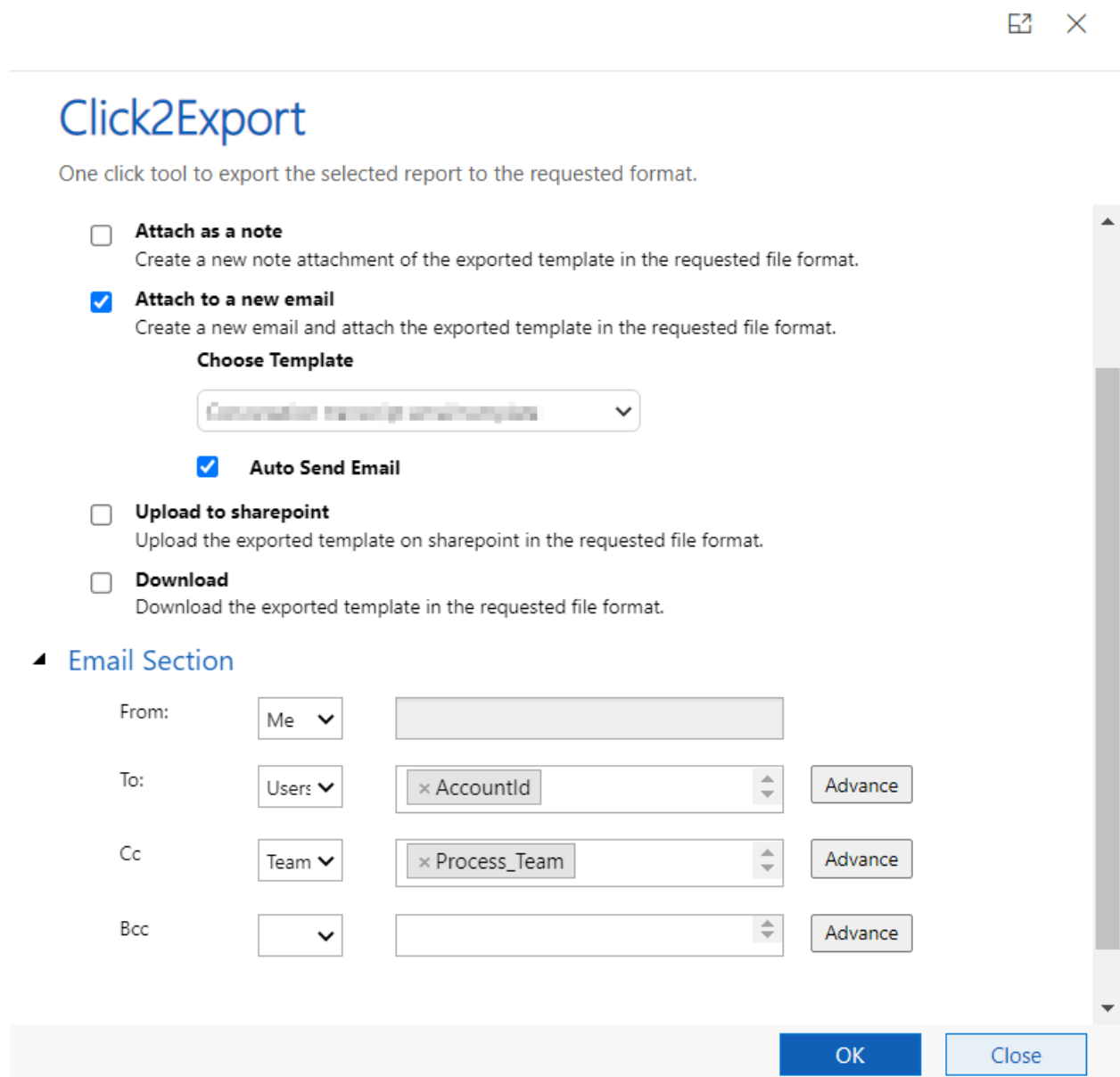
Email Section

OK Close

- a. **Attach as a note** – The exported report file will be attached as a note to the record against which the export has been executed in the selected file format. This option is not available for excel template.
- b. **Attach to a new email** – The exported report file will be attached as an attachment to a newly created email. The email would be created based on the **email template** specified in the **Choose Template** shown in the below window.
- c. **Choose Template:** This will be populated based on what you have chosen at the time of creating CRM Report Template. You can change the template before exporting the file.
- d. **Auto Send Email:** If this is enabled, then the newly created email will be directly sent to the recipients configured in the Email Section.

- e. **Upload to SharePoint** –The exported report file will be uploaded on the SharePoint in the selected file format. This option is not available for excel template.
Note: User needs to fill the SharePoint details in the Click2Export Configuration to enable this option of upload to SharePoint in Action of Click2Export window.
- f. **Download** – This option will only export the report to requested file format and make the file available for download.

Email Section:



The screenshot shows the Click2Export application window. At the top right, there are window control icons (maximize, close). The main title is "Click2Export" in blue, with the subtitle "One click tool to export the selected report to the requested format." Below this, there are several options with checkboxes:

- 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.
 Choose Template
 ▾
- Auto Send Email**
- Upload to sharepoint**
Upload the exported template on sharepoint in the requested file format.
- Download**
Download the exported template in the requested file format.

Below these options is a section titled "Email Section" with a left-pointing triangle icon. It contains the following fields:

- From:** ▾
- To:** ▾ ▾
- Cc:** ▾ ▾
- Bcc:** ▾ ▾

At the bottom right of the window, there are two buttons: "OK" (blue) and "Close" (light blue).

The values for **Email Section** are **prepopulated** based on what is selected at the time creating **CRM Report Templates**.

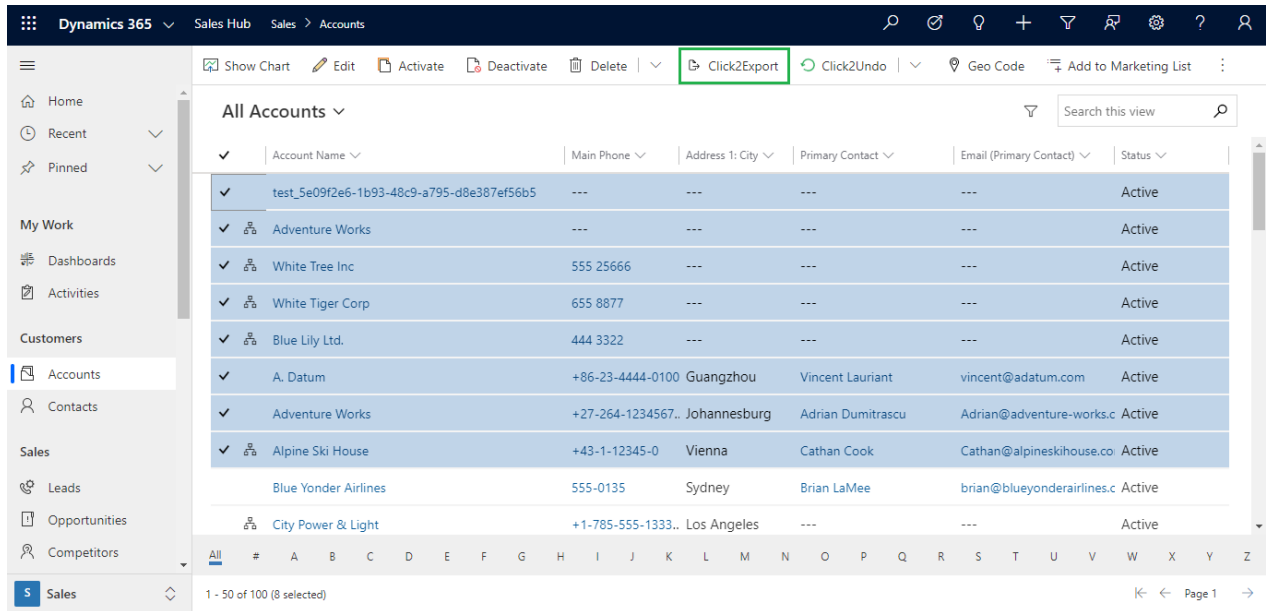
The users are also **allowed** to make changes before the file is exported.

BULK EXPORT WORD TEMPLATE

Using Click2Export, you can export Word Template for multiple records at one go. Let us see how this can be achieved.

Go to the entity for which Word Template is configured.

Choose the required View then select multiple records and click on Click2Export button.



The following Click2Export UI will open.

Report Templates: This is where you will have to select the CRM Report Template for the Word Template that you would want to export.

Selection Mode: Unlike SSRS Report, in case of Word Template exported files can only be generated per record basis.

File Format: This is where you can select the format in which you would like to export your Word Template. Currently, Word Template can be exported in Word and PDF formats.

You can read more about Action and Email Section.

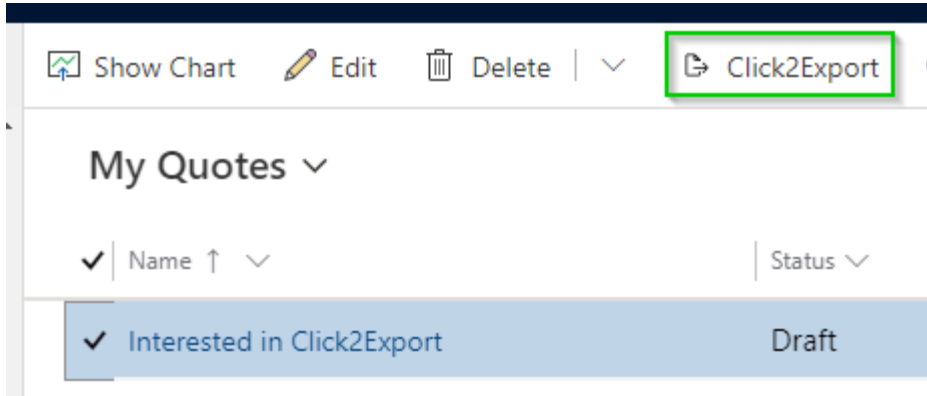
EXPORT SSRS REPORT

Before you could leverage Export SSRS Report feature, you need to create a CRM Report Template for a SSRS Report. In case you have not already created, kindly follow the steps provided [here](#).

Once a CRM Report Template is created, you can go to the respective entity for which the template has been created and start using Export SSRS Report feature.

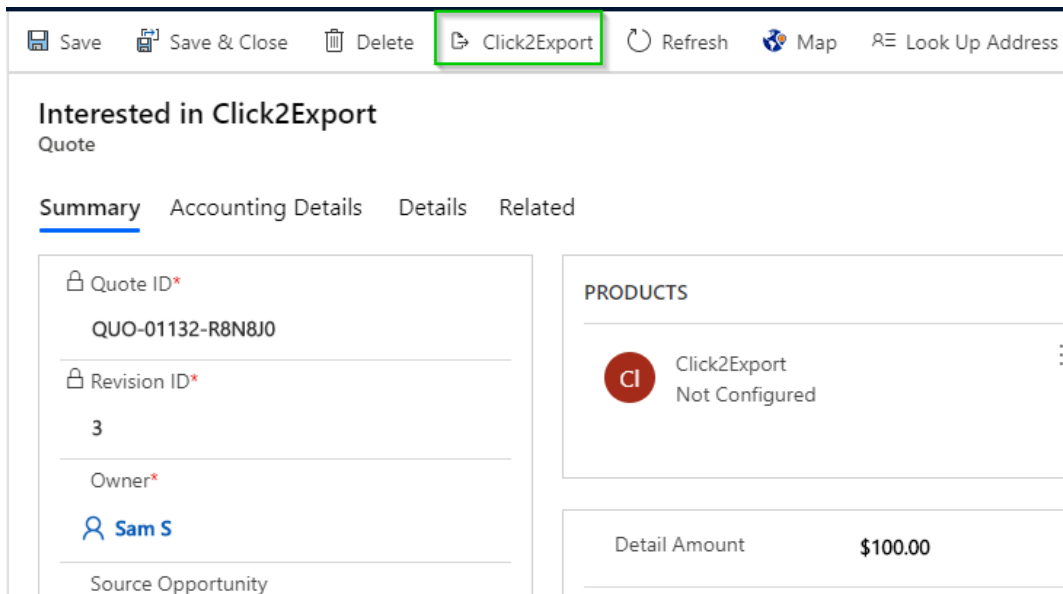
Given below are the steps that needs to be followed to export SSRS Report.

Go to home page --> Select any single record --> Click on Click2Export button.

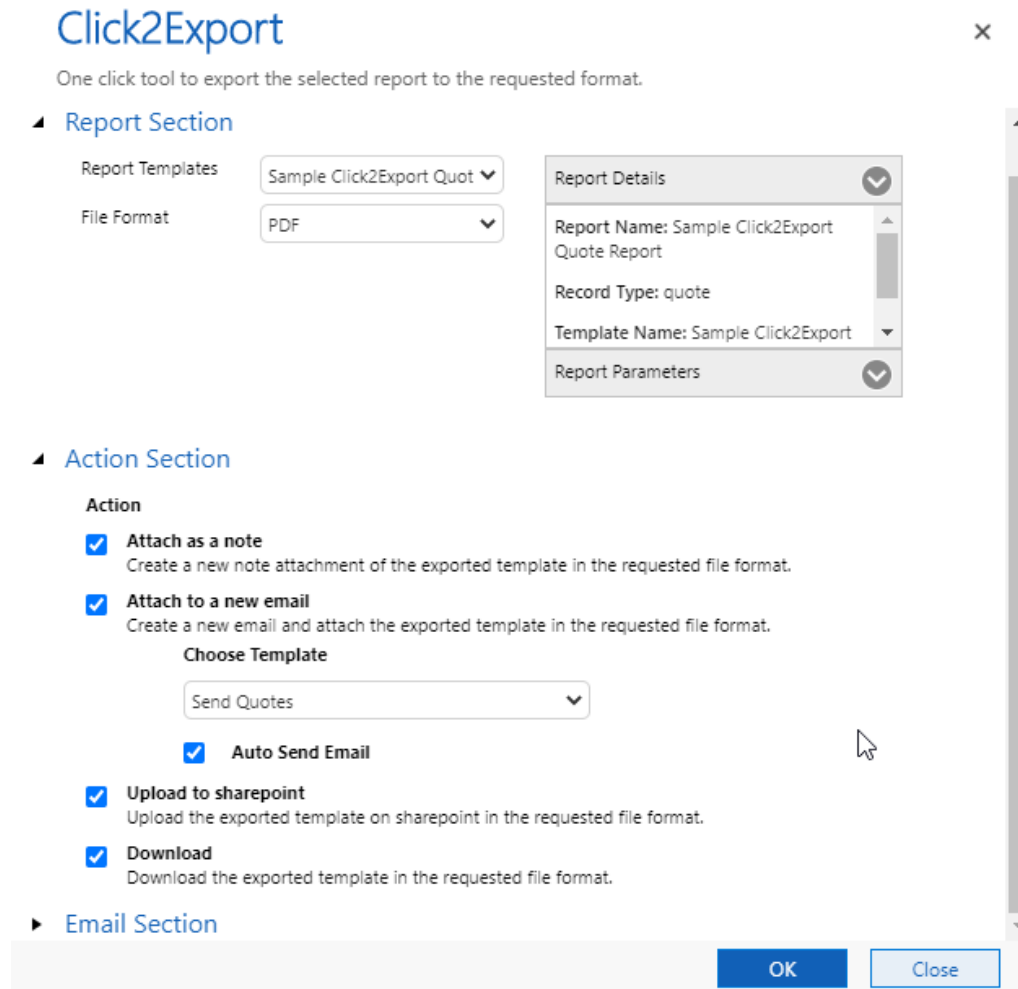


OR

Open any record --> Click on Click2Export button.



The following Click2Export UI will open.



Report Templates: This is where you will have to select the CRM Report Template for the SSRS Report that you would want to export.

File Format: This is where you can select the format in which you would like to export your SSRS Report. Currently, SSRS Report can be exported in PDF, Excel, Word, CSV, and TIFF formats.

Report Details: This would list down details about the SSRS report.

Report Parameters: If the SSRS report is a parameterized report, this section will list down all the parameters of the SSRS report and the user can select values before exporting the report.

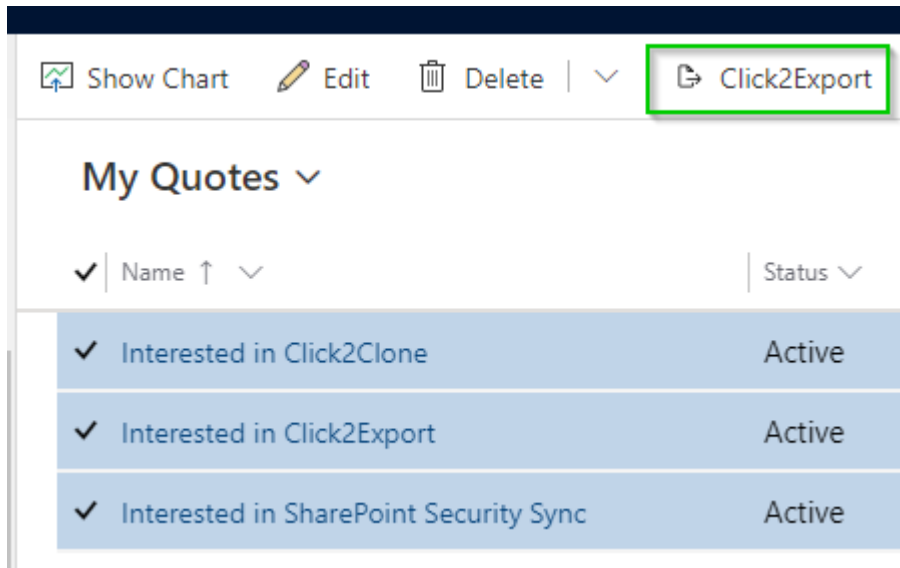
You can read more about Action and Email

BULK EXPORT SSRS REPORT

Using Click2Export, you can export SSRS Report for multiple records at one go. Let us see how this can be achieved.

Go to the entity for which CRM Report Template for SSRS Report is created.

Select multiple records --> Click on Click2Export button.



The following Click2Export UI will open.

The screenshot displays the Click2Export application window. At the top left is the 'Click2Export' logo. Below it is the tagline: 'One click tool to export the selected report to the requested format.' The interface is divided into several sections:

- Report Section:** Contains three dropdown menus: 'Report Templates' (set to 'Sample Click2Export Quot'), 'Selection Mode' (set to 'Per Record'), and 'File Format' (set to 'PDF').
- Report Details:** A panel on the right showing:
 - Report Name: Sample Click2Export Quote Report
 - Record Type: quote
 - Template Name: Sample Click2Export
 - Report Parameters (with a dropdown arrow)
- Action Section:** Contains several options with checkboxes:
 - 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. Below this is a 'Choose Template' dropdown set to 'Send Quotes'.
 - Auto Send Email**
 - Upload to sharepoint**: Upload the exported template on sharepoint in the requested file format.
 - Download**: Download the exported template in the requested file format.
- Email Section:** A section header at the bottom left.

At the bottom right of the window are two buttons: 'OK' and 'Close'.

Report Templates: This is where you will have to select the CRM Report Template for the SSRS Report that you would want to export.

Selection Mode: There are two selection modes available Per Record and Combine.

Per Record: Files would be generated for each of the selected record.

Combine: Single file would be generated for all the selected record.

Note: In case of Combine, only two Actions are allowed Attach to a new email and Download.

File Format: This is where you can select the format in which you would like to export your SSRS Report. Currently, SSRS Report can be exported in PDF, Excel, Word, CSV, and TIFF formats.

Report Details: This would list down details about the SSRS report.

Report Parameters: If the SSRS report is a parameterized report, this section will list down all the parameters of the SSRS report and the user can select values before exporting the report.

SCHEDULE REPORTS

In this feature, the user can set schedule to export and auto send Reports/Word/Excel/Email Templates as email attachments at regular intervals.

1. The first step to Schedule Reports is to **Generate Tokens** as shown [here](#).
2. Next, navigate to **Click2Export --> Schedule Reports --> New** and fill the relevant details as shown below:

General:

The screenshot shows the Dynamics 365 interface for configuring a scheduled report. The breadcrumb trail is 'Dynamics 365 > Click2Export > Click2Export > Schedule Reports > My Account'. The form is titled 'My Account Schedule Reports' and has a 'Scheduled' status. The 'General' tab is active, showing the following fields:

- Name:** My Account
- View:** My Active Accounts
- CRM Report Template:** Account-Account Summary

The 'Schedule Details' section includes:

- Occurrence Pattern:** Daily
- Start Time:** 30-06-2020 09:30
- End by:** 30-07-2020 08:00
- Every X day(s):** 1

In General details the following fields need to be defined.

Name: Give name for the record (Schedule Reports).

CRM Report Template: Select the required **CRM Report Template** from the lookup field – **SSRS/Excel/Word/Email (CRM Views Data)**.

View: Select the necessary view from the drop-down. Export and mail selected Word Template against each individual record present in the selected view. In case of Excel Template, the mail will be sent only to particular recipients selected while configuring CRM Report Template. ***(This field appears only if Word/Excel Template is selected for CRM Report Template)***.

Under **Schedule Details** the user has to fill the following requirements.

Occurrence Pattern: Select any one option from **Daily, Weekly and Monthly**.

Start Time: Select the starting date and time to trigger the first export. Date and time should be current. Past date and time are not considered.

End by: Select the end date and time till when the report should be exported on a regular basis.

Interval:

The interval period depends upon the occurrence pattern selected by the user.

- a) In the below screenshot, **Occurrence Pattern** is set as **Daily** and **Every X day(s)** is set as **3**. Here the first process will occur on 6th June 2019, at 5:30 and from there onwards every **3rd day** till the **End by** date & time.

Schedule Details			
Occurrence Pattern	*	Daily	
Start Time	*	06-06-2019 05:30	End by 12-06-2019 00:00
Every X day(s)	*	3	





- b) In the below screenshot, **Occurrence Pattern** is set as **Weekly** and **Recur every X week(s)** is set as **2**. Here the first process will occur on the set **Start Time**. Next it will occur on the coming **Tuesday** and from there onwards every **2 weeks** on **Tuesday**, till the **End by** date & time.

Schedule Details			
Occurrence Pattern	*	Weekly	
Start Time	*	06-06-2019 05:30	End by 03-07-2019 00:00
Recur every X week(s)	*	2	
Monday		<input type="checkbox"/>	Friday <input type="checkbox"/>
Tuesday		<input checked="" type="checkbox"/>	Saturday <input type="checkbox"/>
Wednesday		<input type="checkbox"/>	Sunday <input type="checkbox"/>
Thursday		<input type="checkbox"/>	

- c) In below screenshot, **Occurrence Pattern** is set as **Monthly**, **Day** is set as **4** and **of every X month(s)** is set as **2**. Here the first process will occur on the set **Start Time** and from there onwards **4th** day of every **2 months**, till the **End by** date & time.

Schedule Details

Occurrence Pattern * **Monthly**

Start Time * 06-06-2019  05:30  End by 06-12-2019  00:00 

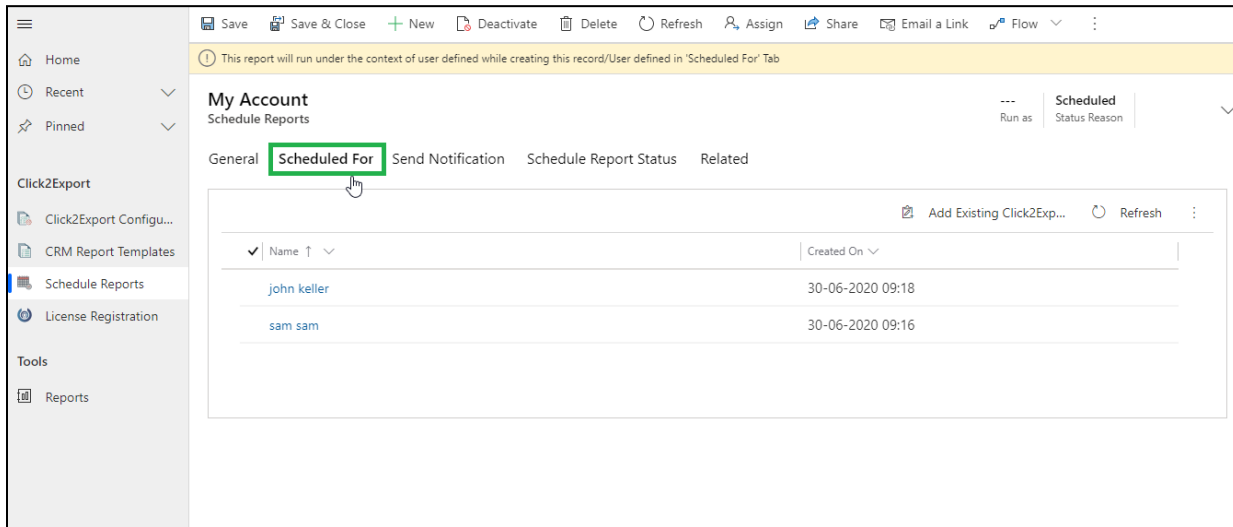
Day * **4** Of every X month(s) * **2**

Fill the required fields and click on **Save**.

Note:

- The user with Click2Export Administrator role can run same scheduling under multiple users at the same time.
- The user with Click2Export User role will not be able to see 'Scheduled For' tab and can only run this scheduling under themselves.

Scheduled For:



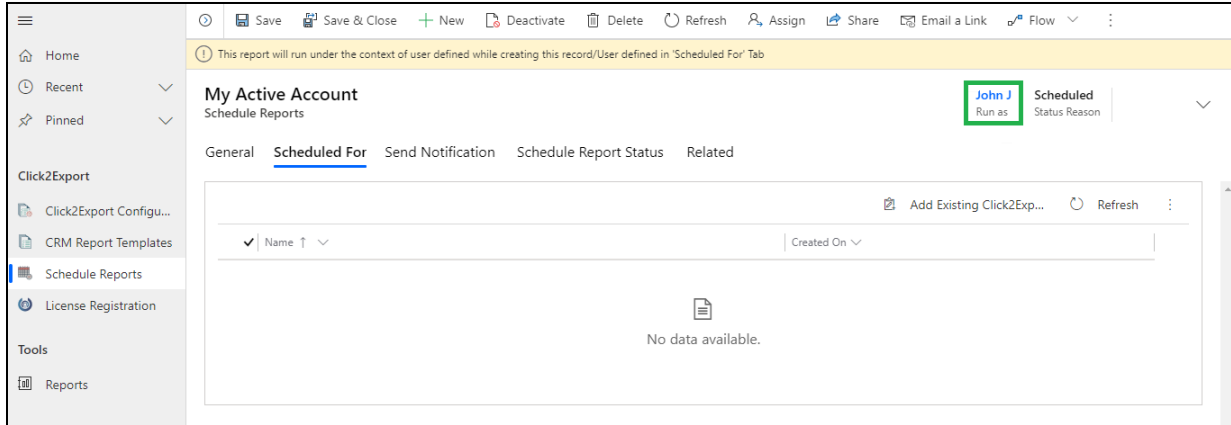
The screenshot shows the 'Scheduled For' tab in the Click2Export application. The interface includes a top navigation bar with options like Save, New, and Refresh. Below this, there's a warning message: "This report will run under the context of user defined while creating this record/User defined in 'Scheduled For' Tab". The main content area is titled "My Account" and "Schedule Reports". It features several tabs: General, **Scheduled For** (highlighted with a green box), Send Notification, Schedule Report Status, and Related. Under the "Scheduled For" tab, there is a table with the following data:

Name	Created On
john keller	30-06-2020 09:18
sam sam	30-06-2020 09:16

For this, you need to do '**Set Credentials**' on User form once to Generate Tokens. (Required for Reports/Word/Excel Template)

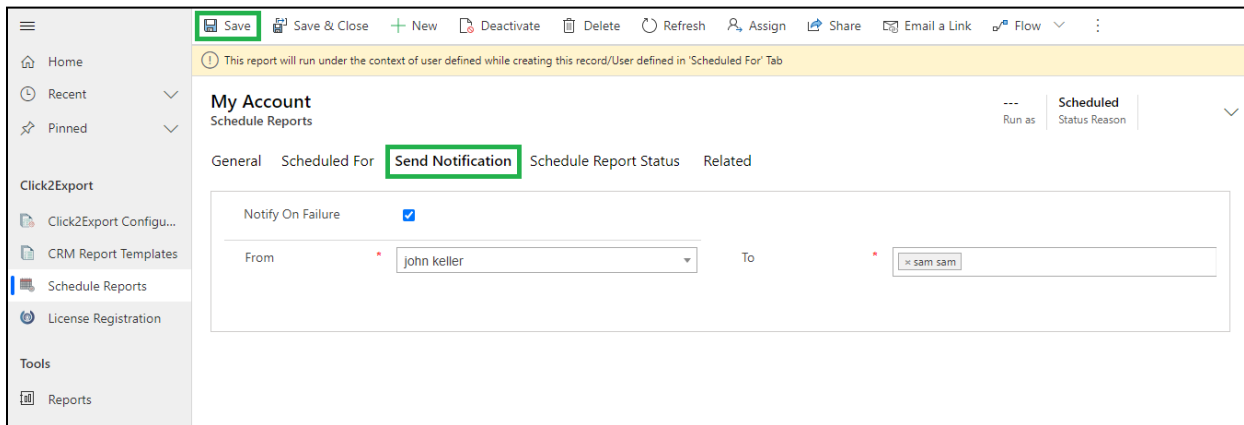
If no one is added in '**Scheduled For**' then this scheduling will be under the user selected in '**Run as**' field.

Click2Export - User Manual



Send Notification:

- Next go to **Send Notification** section. Enable **Notify on Failure** checkbox and select sender and recipient(s) from the dropdown. This will ensure that an email is sent to notify recipient(s) about **Schedule Reports** process failure. Click on **Save** and complete the configuration of Schedule Reports.



Scheduled Report Status:

- Now to see the status of scheduling you can go to '**Schedule Report Status**' tab.

Click2Export - User Manual

The screenshot shows the Click2Export interface with the 'Schedule Report Status' tab selected. The interface includes a top navigation bar with options like Save, New, Deactivate, Delete, Refresh, Assign, Share, Email a Link, and Flow. A left sidebar contains navigation options such as Home, Recent, Pinned, Click2Export, Click2Export Configu..., CRM Report Templates, Schedule Reports, License Registration, Tools, and Reports. The main content area displays a table of schedule reports for 'My Account'.

Name	Status Reason	Status Description	Schedule Reports	Start Time	End Time
My Account	Succeeded	Workflow executed successfully.	My Account	02-07-2020 09:30	02-07-2020 09:30
My Account	Succeeded	Workflow executed successfully.	My Account	01-07-2020 09:30	01-07-2020 09:30
My Account	Succeeded	Workflow executed successfully.	My Account	30-06-2020 09:30	30-06-2020 09:30

- To view configured Schedule Reports, navigate to **Click2Export --> Schedule Reports --> Active Schedule Reports**.

The screenshot shows the 'Active Schedule Reports' view. It includes a search bar and a table with columns for Name, Occurrence Pattern, CRM Report Template, Status Reason, Next Run Time, Created On, and Modified On.

Name	Occurrence Pattern	CRM Report Template	Status Reason	Next Run Time	Created On	Modified On
My Account	Daily	Account-Account Summary	Scheduled	03-07-2020 09:30	30-06-2020 09:20	02-07-2020 ...

- Similarly, to view Schedule Reports with completed process navigate to **Click2Export --> Schedule Reports --> Inactive Schedule Reports**.

The screenshot shows the 'Inactive Schedule Reports' view. It includes a search bar and a table with columns for Name, CRM Report Template, Occurrence Pattern, Status Reason, Created On, and Modified On.

Name	CRM Report Template	Occurrence Pattern	Status Reason	Created On	Modified On
My Account	Account-Account Summary	Daily	Completed	30-06-2020 09:20	02-07-2020 16:01

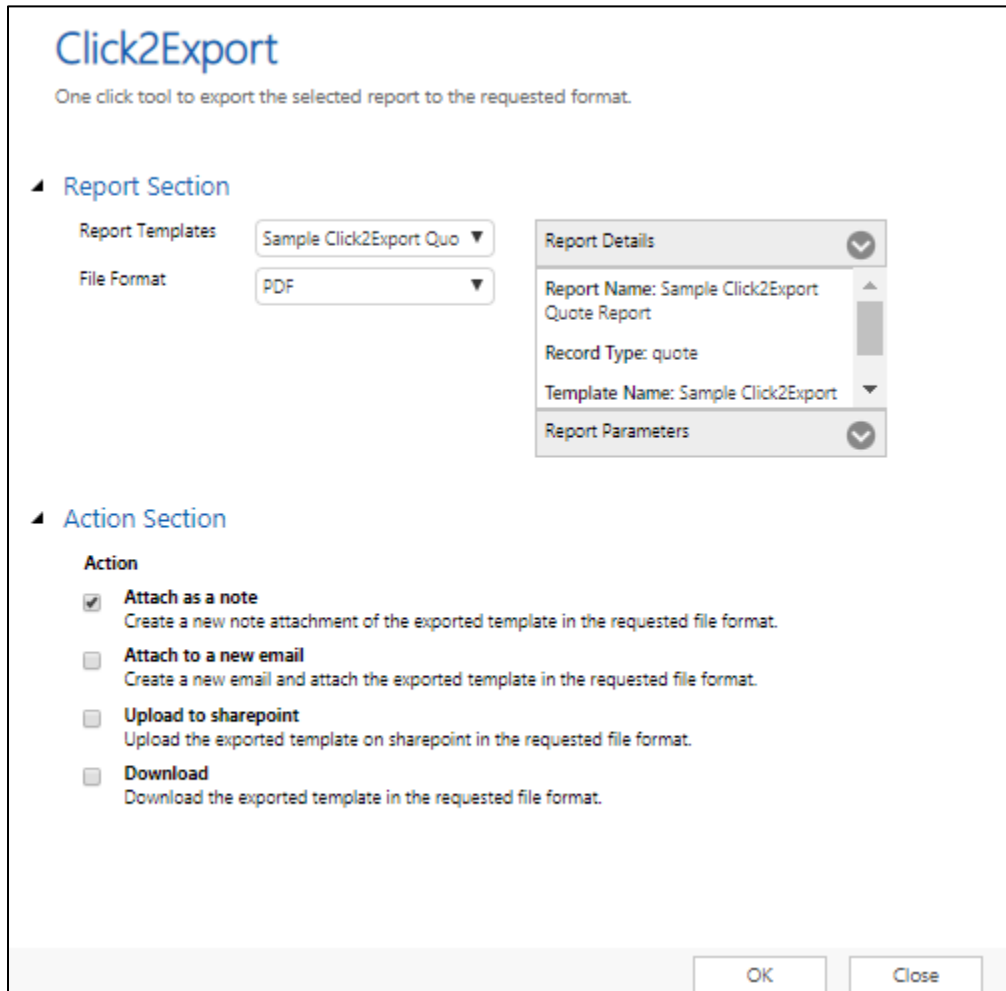
Note: If End by date is not defined, then the process will go on nonstop.

CLICK2EXPORT USE CASES

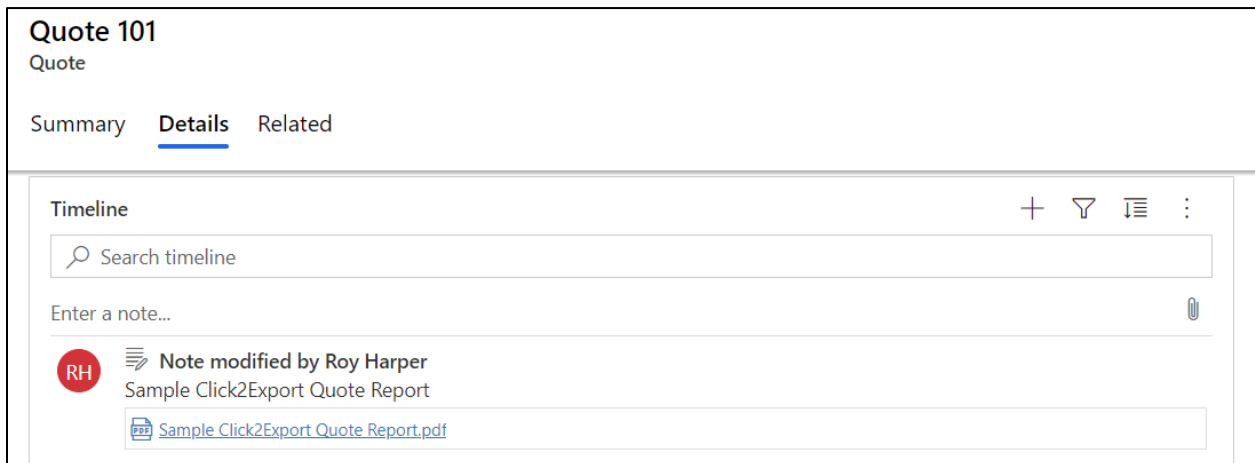
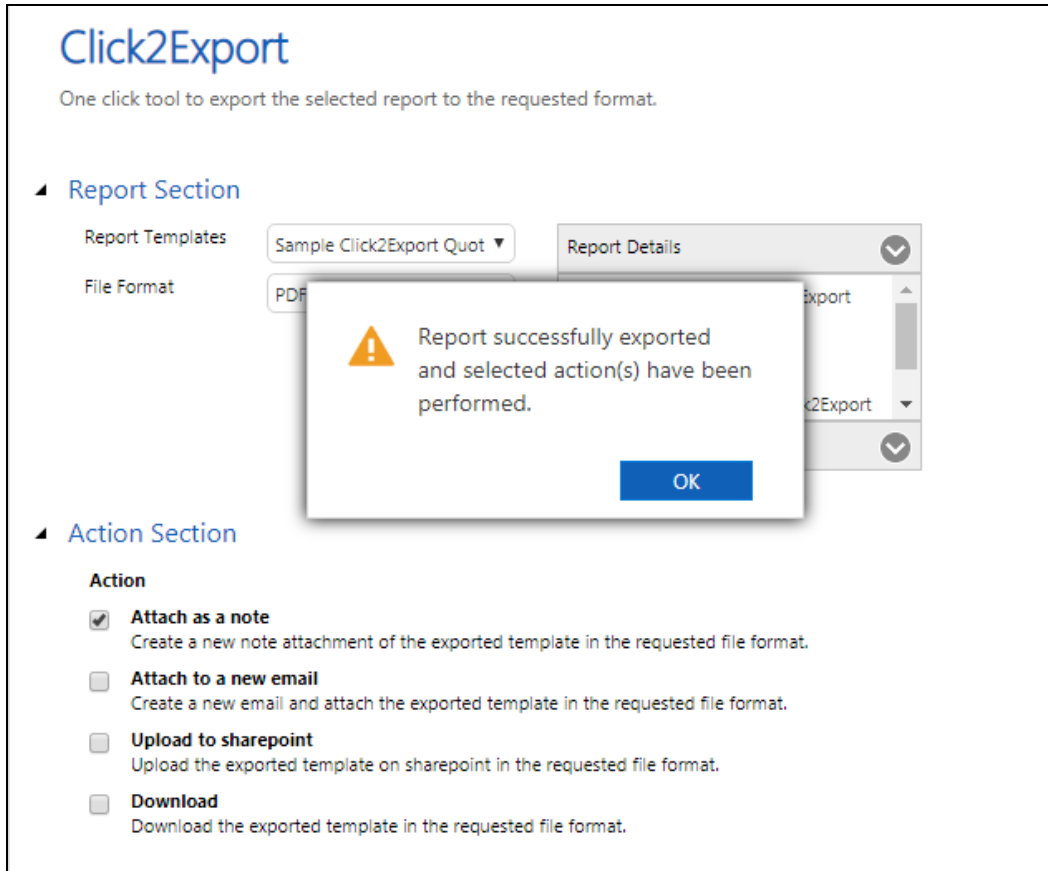
CLICK2EXPORT SELECTING A SINGLE RECORD OR FROM WITHIN A PARTICULAR RECORD:

The functionality can be accessed from an entity form as well as the home page grid. When the program is invoked for only a single selected record you will be presented with the following options on the Click2Export window.

Here all the four actions are allowed and you can also edit the default parameters before continuing.



If you choose note option then the exported file in selected format will be attached to a note in that selected record itself.



If you choose email attachment option then, it will ask for an email template to be used in order to compose the email in choose template.

Also, Auto Send Email option will be available where user would be able to automatically send the email with the attachment of exported report file.

Email Section is available to select the sender, receiver, CC and BCC.

A new email will be created with the exported file attached to it. This time, the email will be associated with the primary record against which the report was executed. It will open the draft email and present it to the user for further editing and send.

If the user set the Auto Send as yes then the email will be sent automatically with the attachment of exported file and the content of email would be as email template selected in the choose template dropdown.

The screenshot shows a dialog box titled "Click2Export" with a close button (X) in the top right corner. Below the title is the subtitle "One click tool to export the selected report to the requested format." The main content is organized into sections:

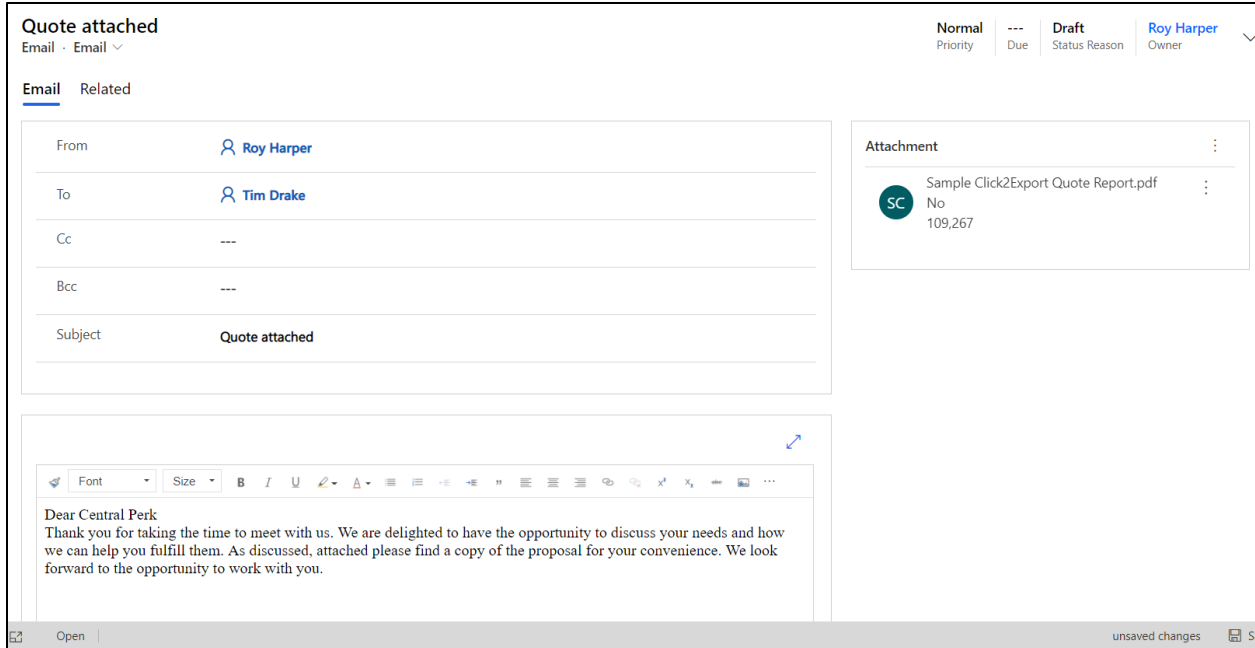
- Action**
 - Attach as a note**
Create a new note attachment of the exported template in the requested file format.
 - Attach to a new email**
Create a new email and attach the exported template in the requested file format.
- Choose Template**
 - Dropdown menu: --None--
- Auto Send Email**
- Upload to sharepoint**
Upload the exported template on sharepoint in the requested file format.
- Download**
Download the exported template in the requested file format.

▲ Email Section

From:	Me	▼	
To:	Users	▼	× Tim Drake
Cc:		▼	
Bcc:		▼	

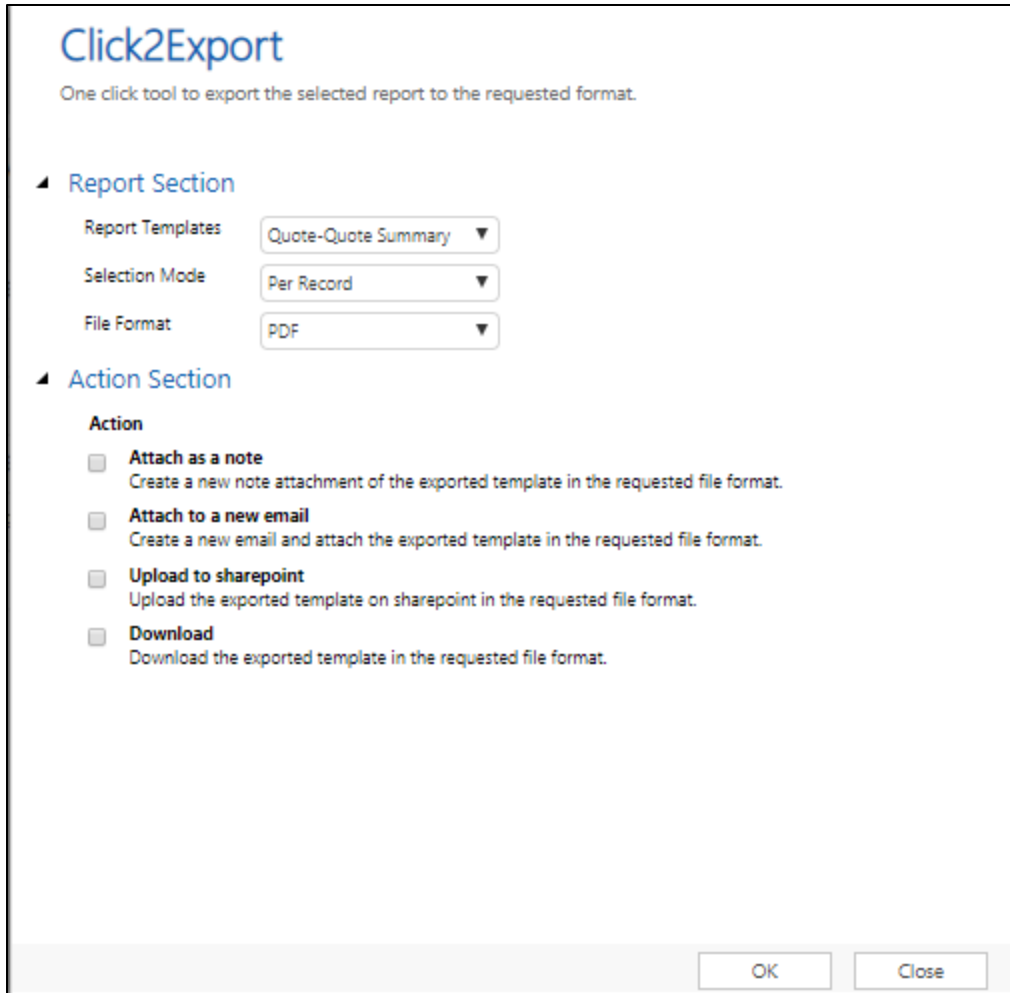
At the bottom right, there are two buttons: "OK" (blue) and "Close" (light blue).

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CLICK2EXPORT SELECTING MULTIPLE RECORDS FROM THE VIEW

You may at time want to bulk export report for multiple records. This option is supported by Click2Export. You can select multiple records from the entity grid and click the Click2Export ribbon button.



In this case of which you find a new option available as Selection Mode. This has two supported options “Per Record” and “Combine”.

If you would like to generate one report per record, you would choose the “Per Record” option. However, if you would like to use the selected records as filters to be passed to the report to be exported as a single report, you would choose the option of “Combine”.

For “Per Record” option one report is exported per selected record.

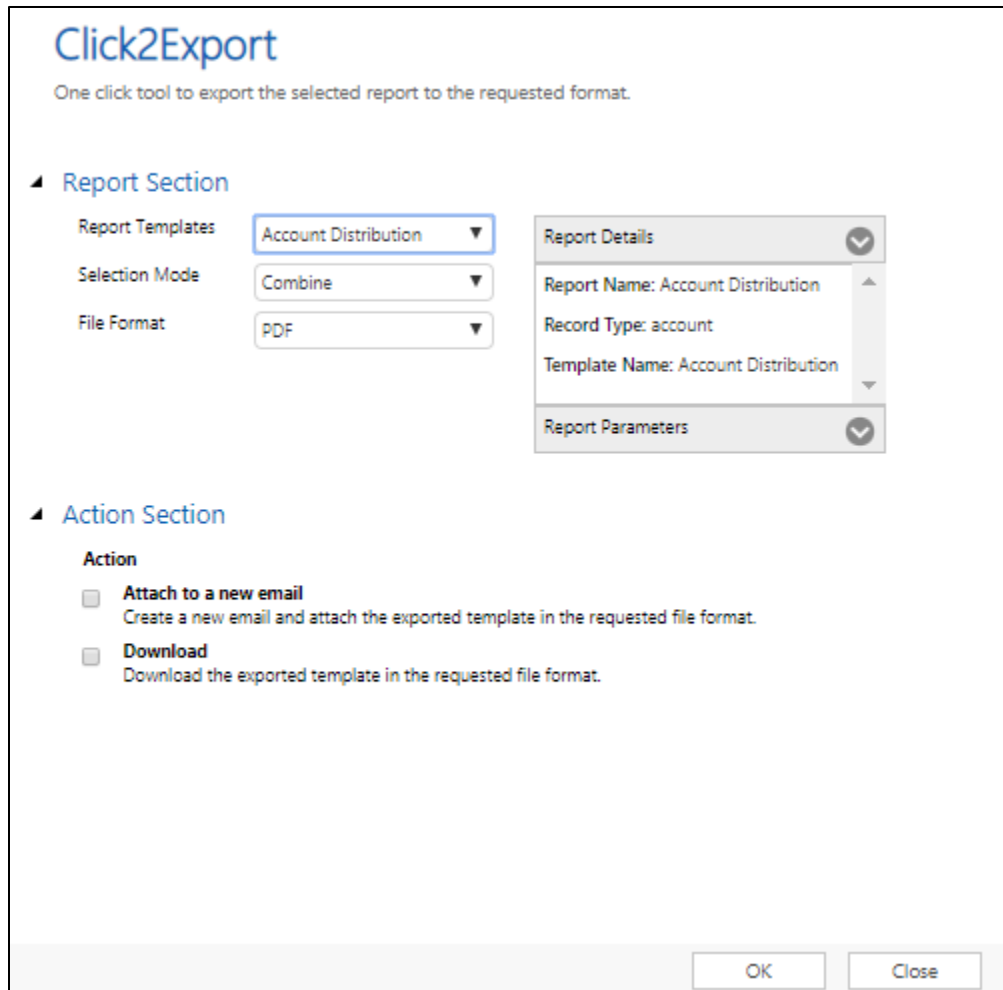
Attach as Note – The file attached against the primary record.

Attach to a new email – This will create one new email with the template selected in Choose Template per selected record and attach the respective exported file to the email. User can automatically send the Email with the Auto Send Email option and select the sender, receiver, CC and BCC of the Email in Email Section.

Upload to SharePoint – This will help the user to upload the exported file on SharePoint.

Download – This will make all the exported file available for download one after the other.

For “**Combine**” option only one report is exported to include all selected records.



Attach to a new email – This will create a new email and attach the exported file to the email template selected in the Choose Template option. It will present the draft email window for the user to edit further and send. User can automatically send the Email with the Auto Send Email option and select the sender, receiver, CC and BCC of the Email in Email Section.

Download – This will make the exported file available for download.

CLICK2EXPORT EXPORTING EXCEL TEMPLATE

Before you could leverage Export Excel Template feature, you need to create a CRM Report Template for an Excel Template. In case you have not already created, kindly follow the steps provided [here](#).

Once a CRM Report Template is created, you can go to the respective entity for which the template has been created and start using Export Excel Template feature.

Given below are the steps that needs to be followed to export Excel Template.

Go to home page --> Click on Click2Export button.



All Opportunities ▾

Note:

For Excel Template, you need to click on button without selecting any record.

Button would only be visible if there are CRM Report Template for Excel Template created for the respective entity.

The following Click2Export UI will open.

Click2Export



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

Report Section

Report Templates	Opportunity-Pipeline Man ▼
File Format	Excel ▼
View	All Opportunities ▼

Action Section

Action

- Attach to a new email**
Create a new email and attach the exported template in the requested file format.
 - Auto Send Email**
- Download**
Download the exported template in the requested file format.

Email Section

OK

Close

Report Templates: This is where you will have to select the CRM Report Template for the Excel Template that you would want to export.

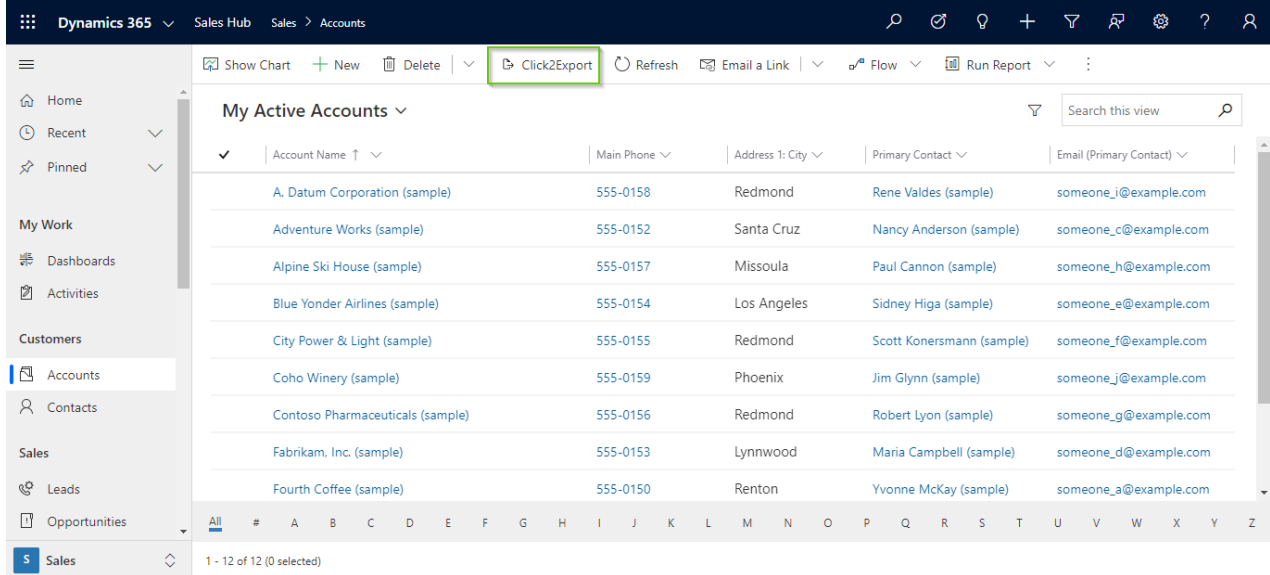
File Format: This is where you can select the format in which you would like to export your Excel Template. Currently, Excel Template can be exported in **Excel format**.

View: Here you need to select the view which you would want to export in an Excel. By default, this will always be the view which user was on at the time of clicking **Click2Export** button.

You can read more about **Action and Email** Section from [here](#).

CLICK2EXPORT EXPORTING EMAIL TEMPLATE (CRM VIEWS DATA)

Email Templates can be exported for a View. Go to the entity for which you have configured Email Template and click on Click2Export button.



The options for entity will be listed specific to the Views for which Email Templates have been created. Select the configured View you want to export --> Click on OK.

Click2Export



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

Report Section

Report Templates: Account-My Active Accou ▾
File Format: Table ▾
View: My Active Accounts ▾

Action Section

Action

- Attach to a new email**
Create a new email and attach the exported template in the requested file format.

Choose Template

My Active Accounts ▾

- Auto Send Email

Email Section

OK

Close

Once export is complete a confirmation message will pop-up.

Click2Export



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

Report Section

Action Section

Action

- Attach to a new email**

Create a new email and

Choose Templ

Account-My Active Accou ▾

- Auto Send email

Email Section

From: Me ▾
To: ▾
Cc: ▾
Bcc: ▾



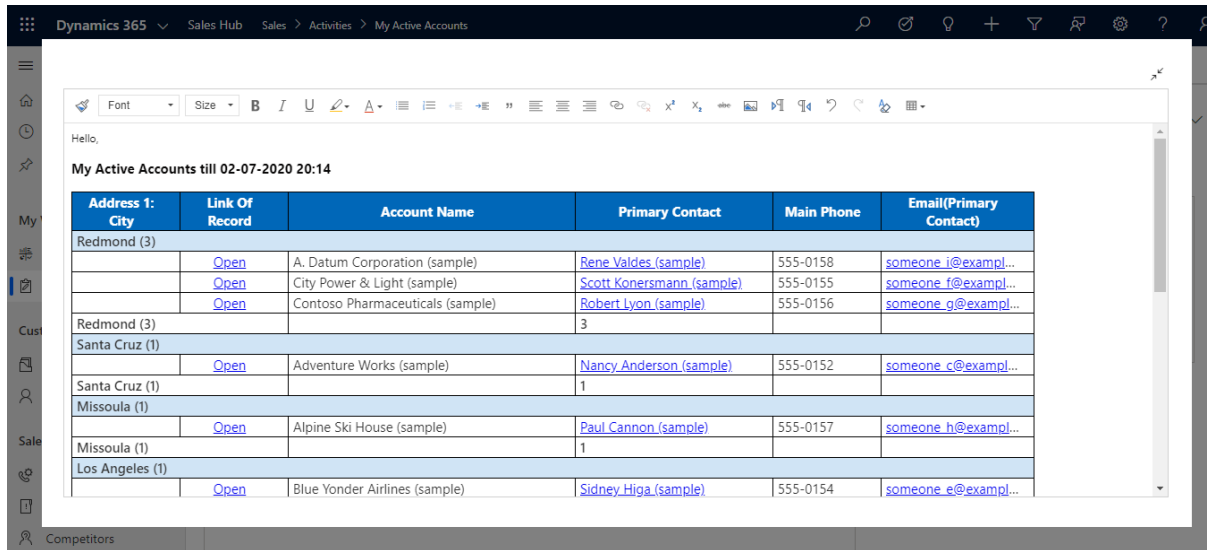
Report successfully exported and selected action(s) have been performed.

OK

OK

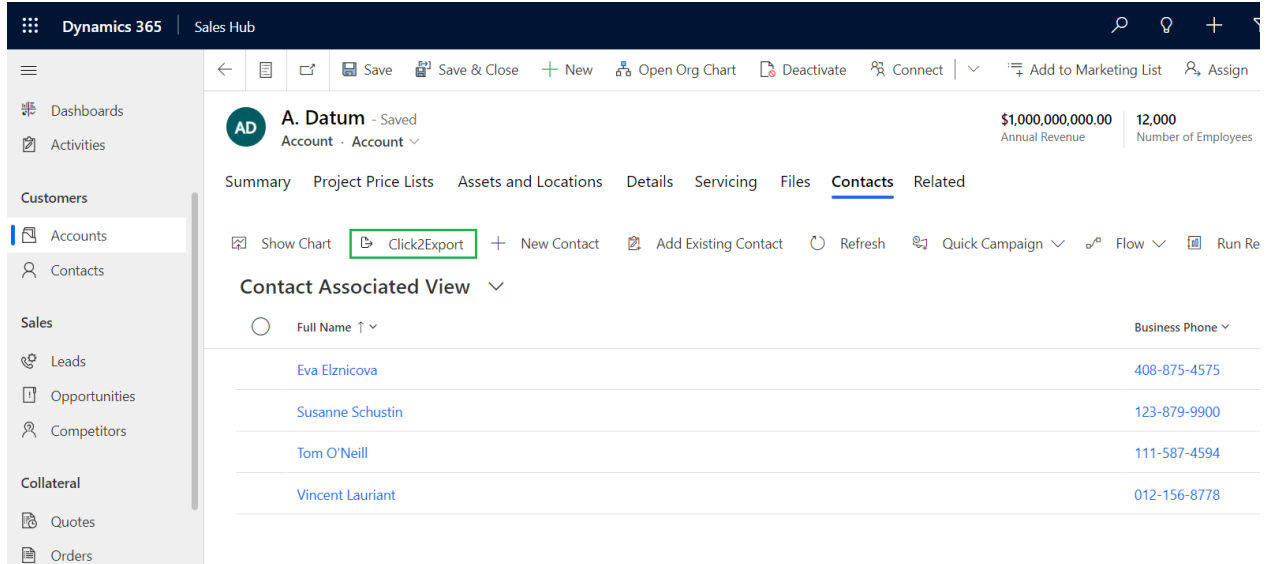
Close

Here, you can see the email window with email drafted along with the View details in tabular form.



CLICK2EXPORT FROM SUBGRID

Click2Export' button is available on the subgrid level as well which makes it easy for the users to export the related data from records with just a single click.



LIMITATIONS OF CLICK2EXPORT

- The one-click solution does not support SQL reports.
- Click2Export does not support reports with multi-select parameter.

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