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

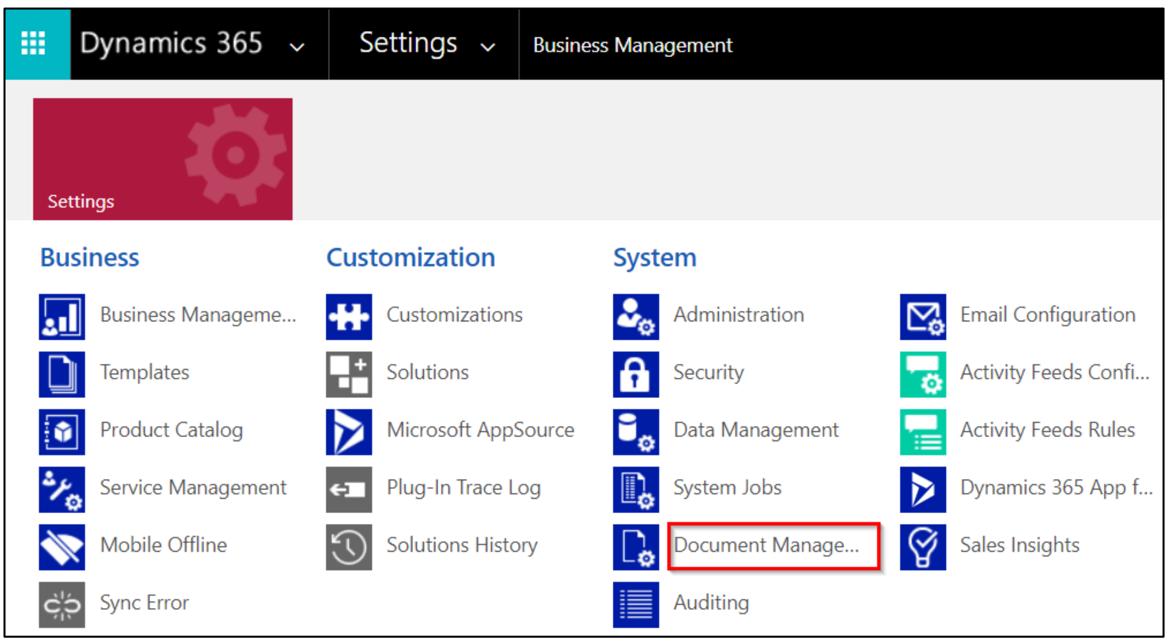
PREREQUISITES

Enable SharePoint Integration

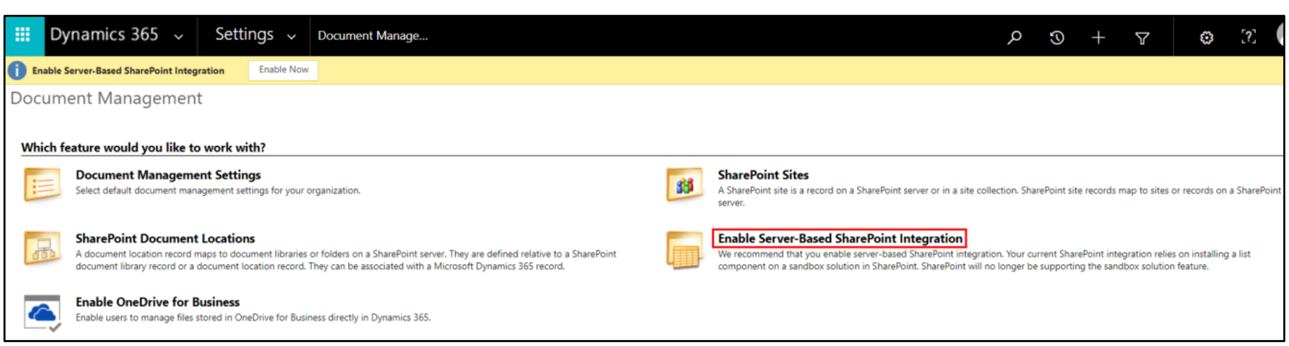
Before you start using Click2Export solution, it is necessary to enable server-based SharePoint integration for your Dynamics 365 CRM environment.

To do this, follow the steps given below:

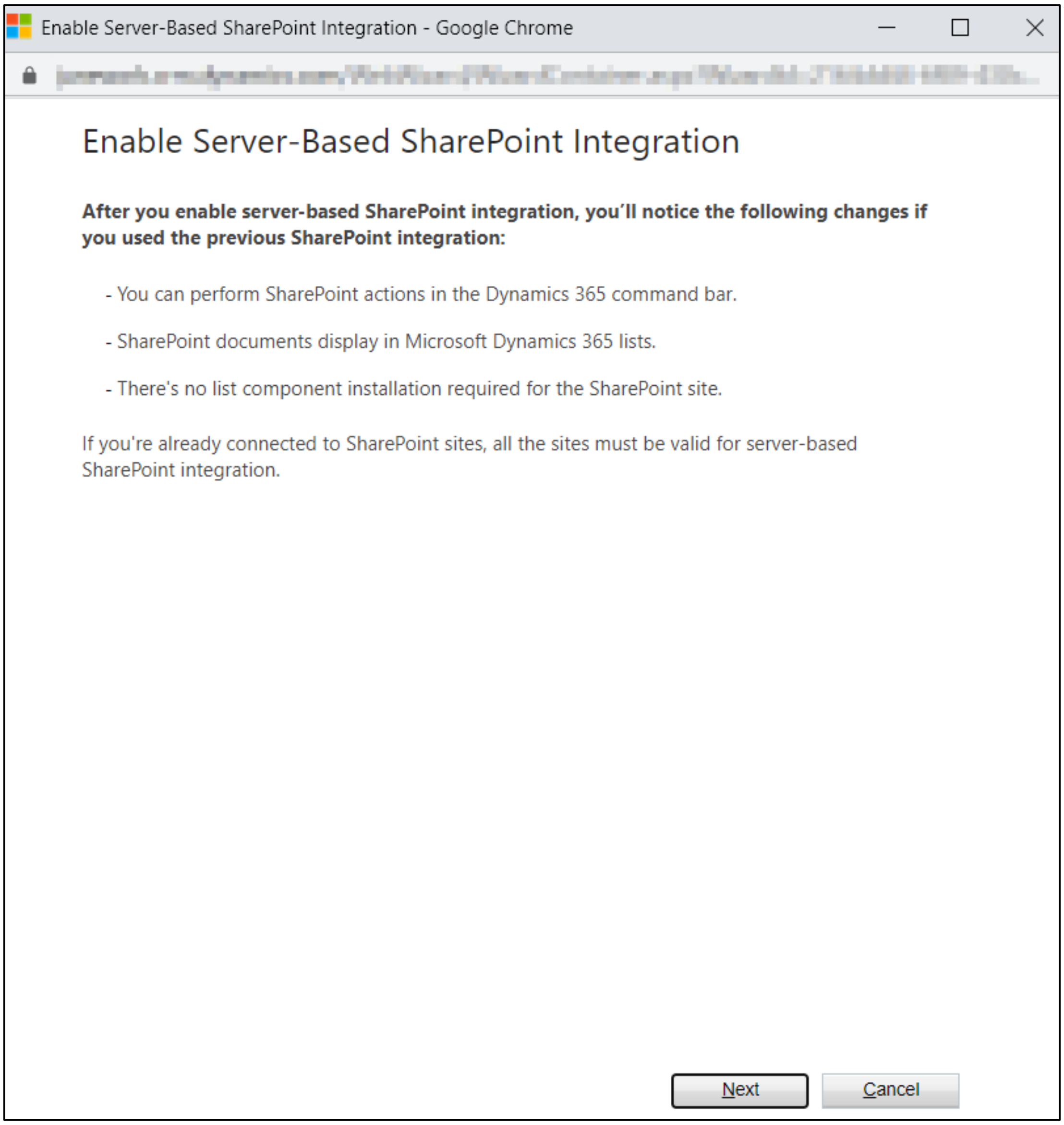
1) Navigate to **Advanced Settings →Settings →Document Management.**



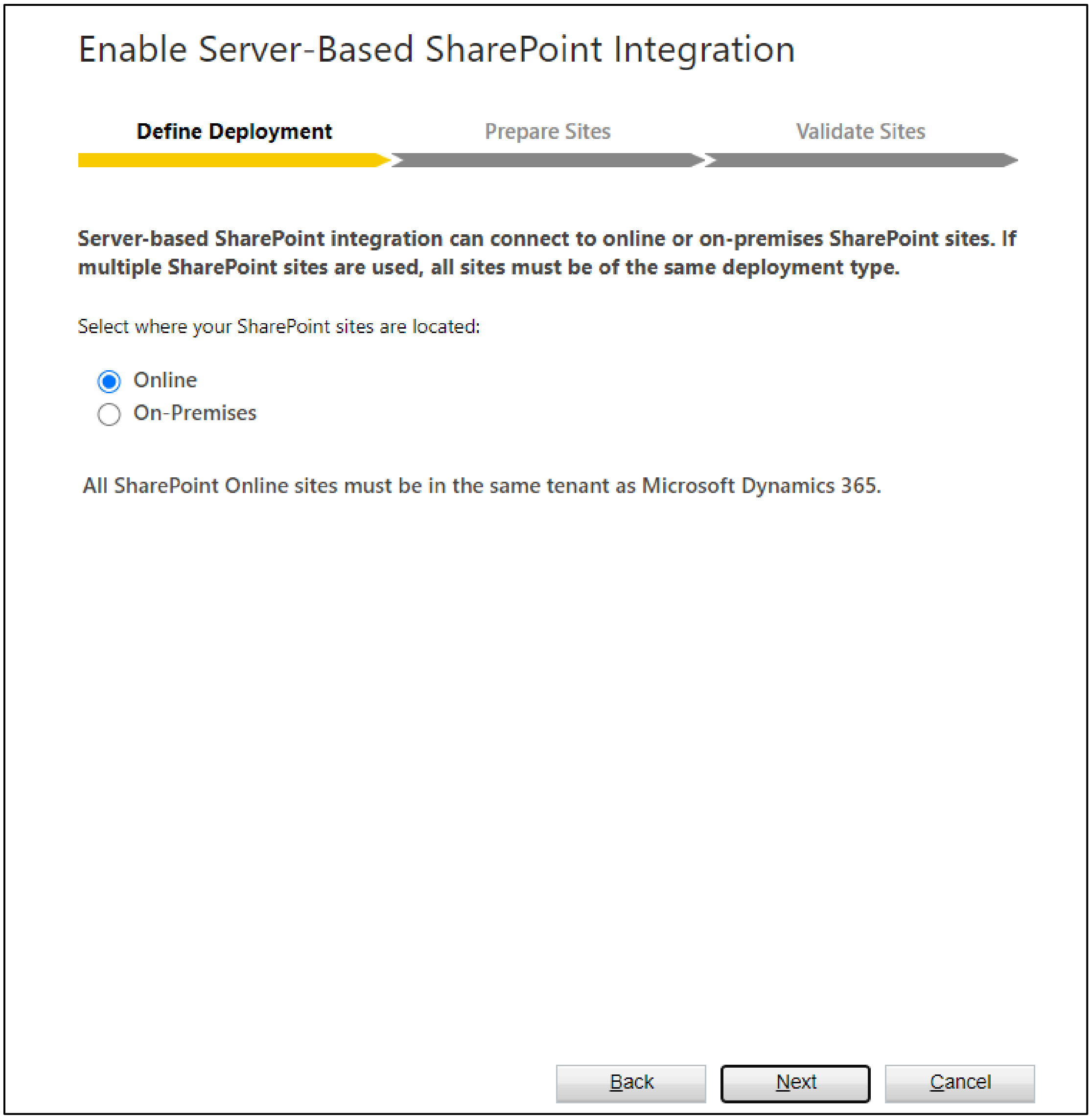
2) Go to **'Enable Sever-Based Sharepoint Integration'**.



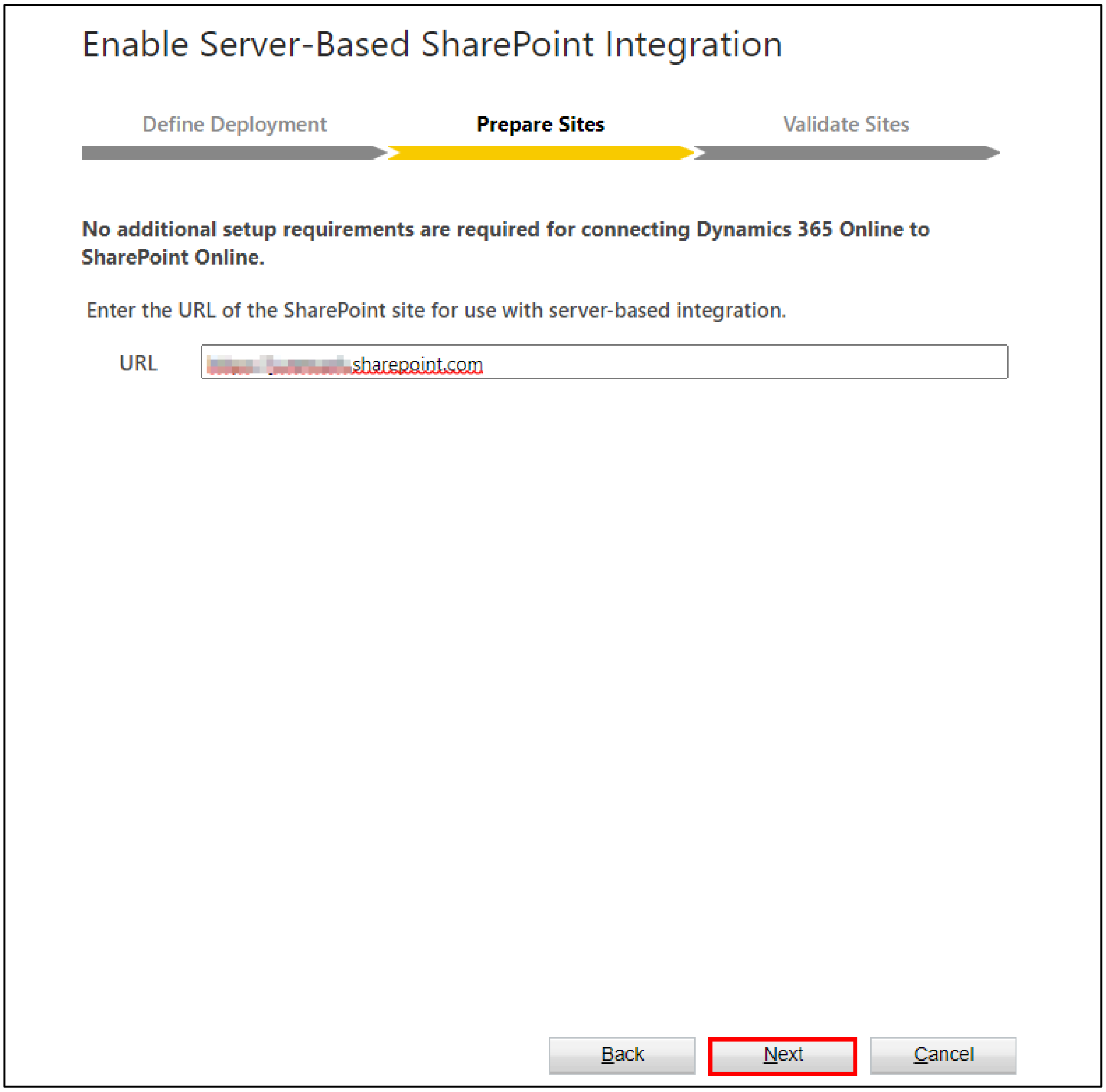
3) Click on **Next.**



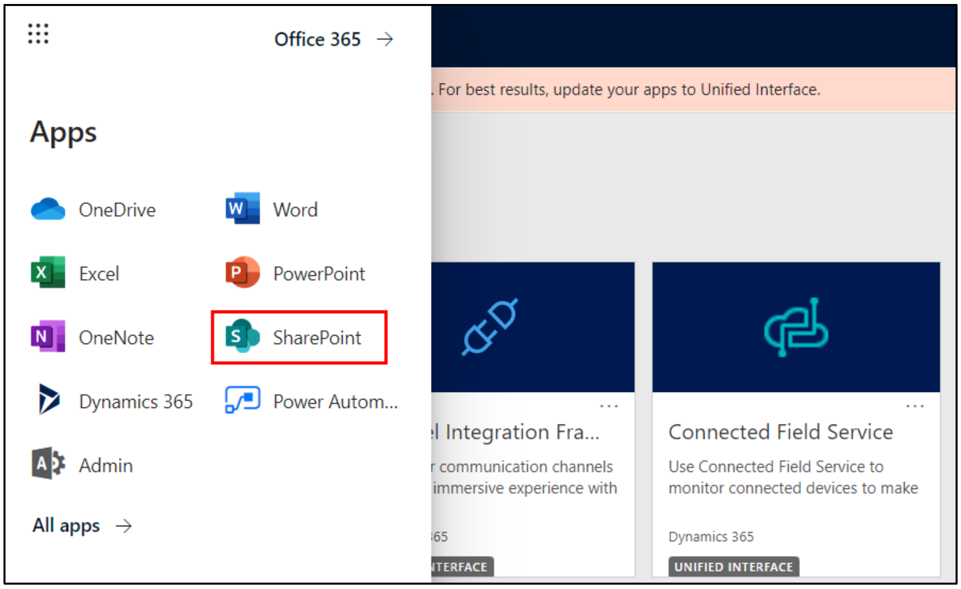
4) Now, select the **location of SharePoint site** and click on **Next.**



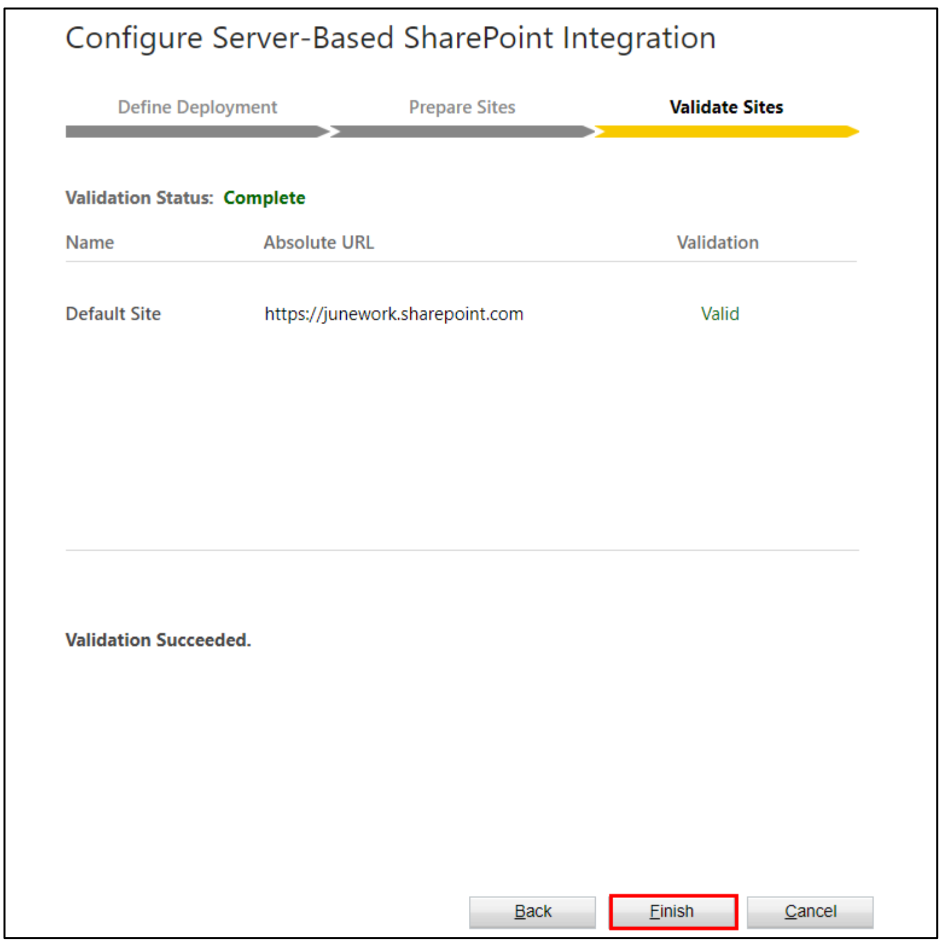
5) Now, enter the **URL of SharePoint site** that you want to use → Click on **Next.**



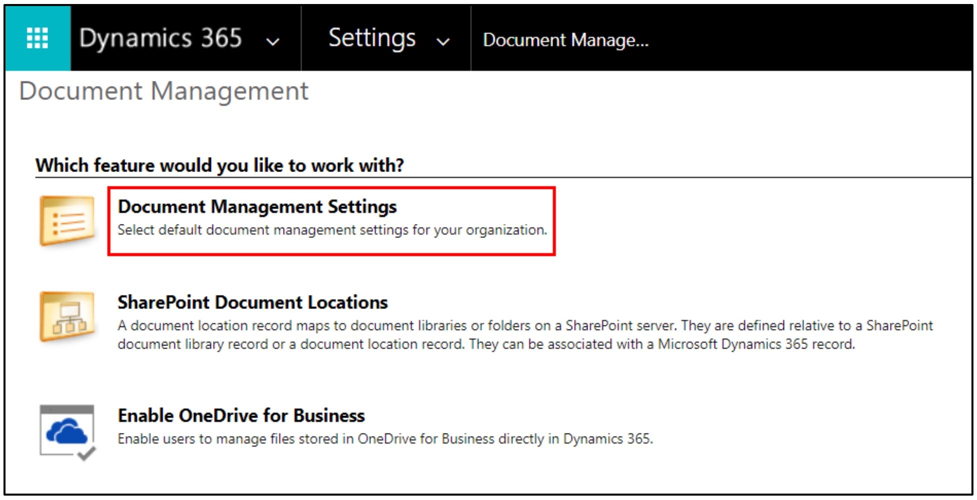
6) You can get the URL of SharePoint site from here.



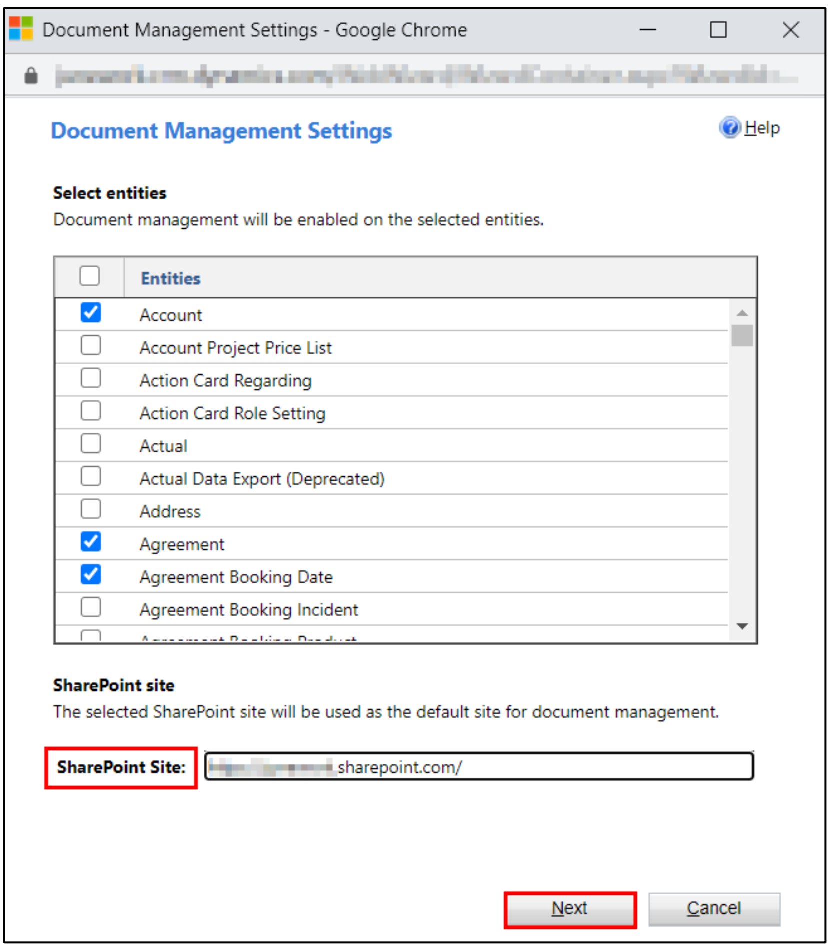
7) Once the site is validated, click on **Finish.**



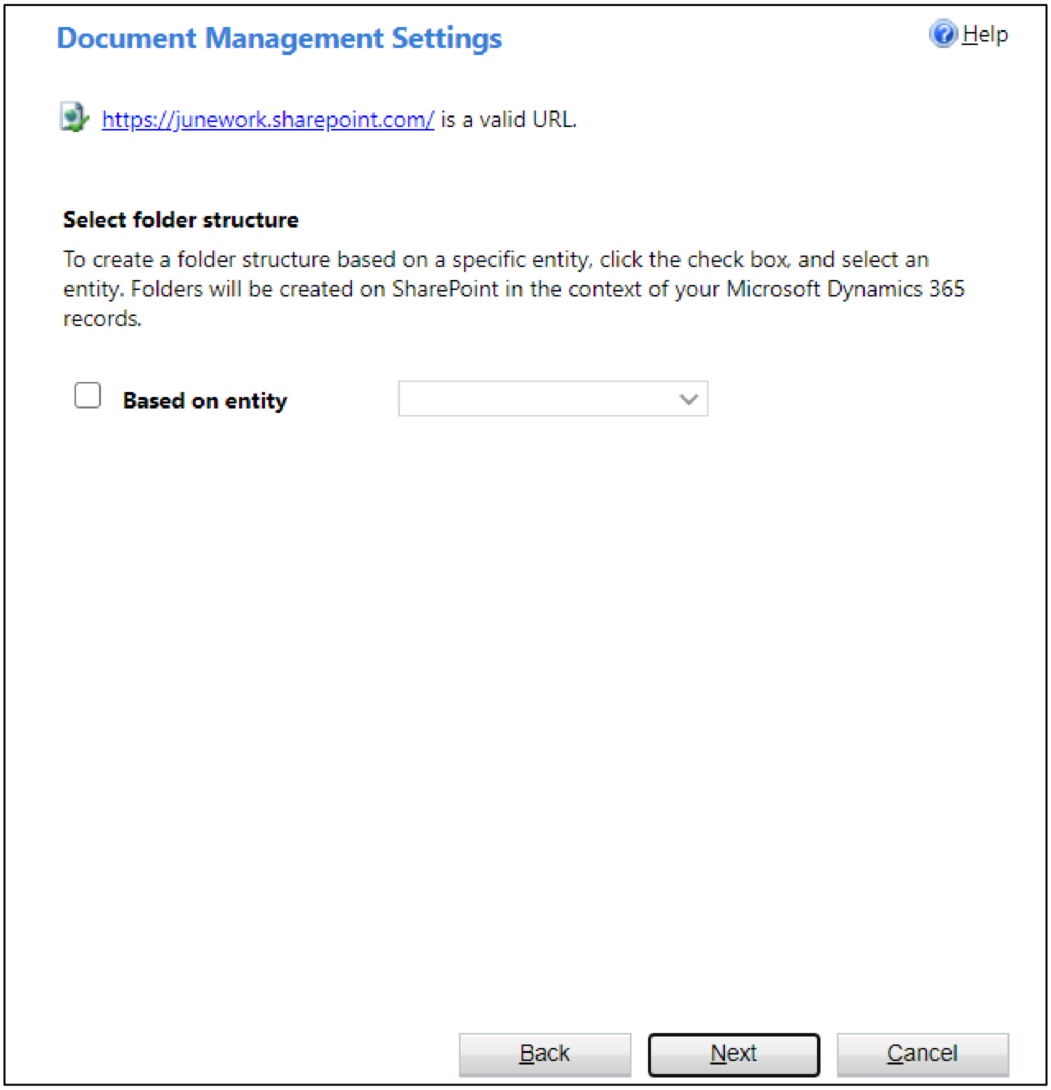
8) The **server-based integration** of SharePoint site is now **enabled** for your Dynamics 365 CRM environment. Now, go back to **Settings → Document Management Settings**.



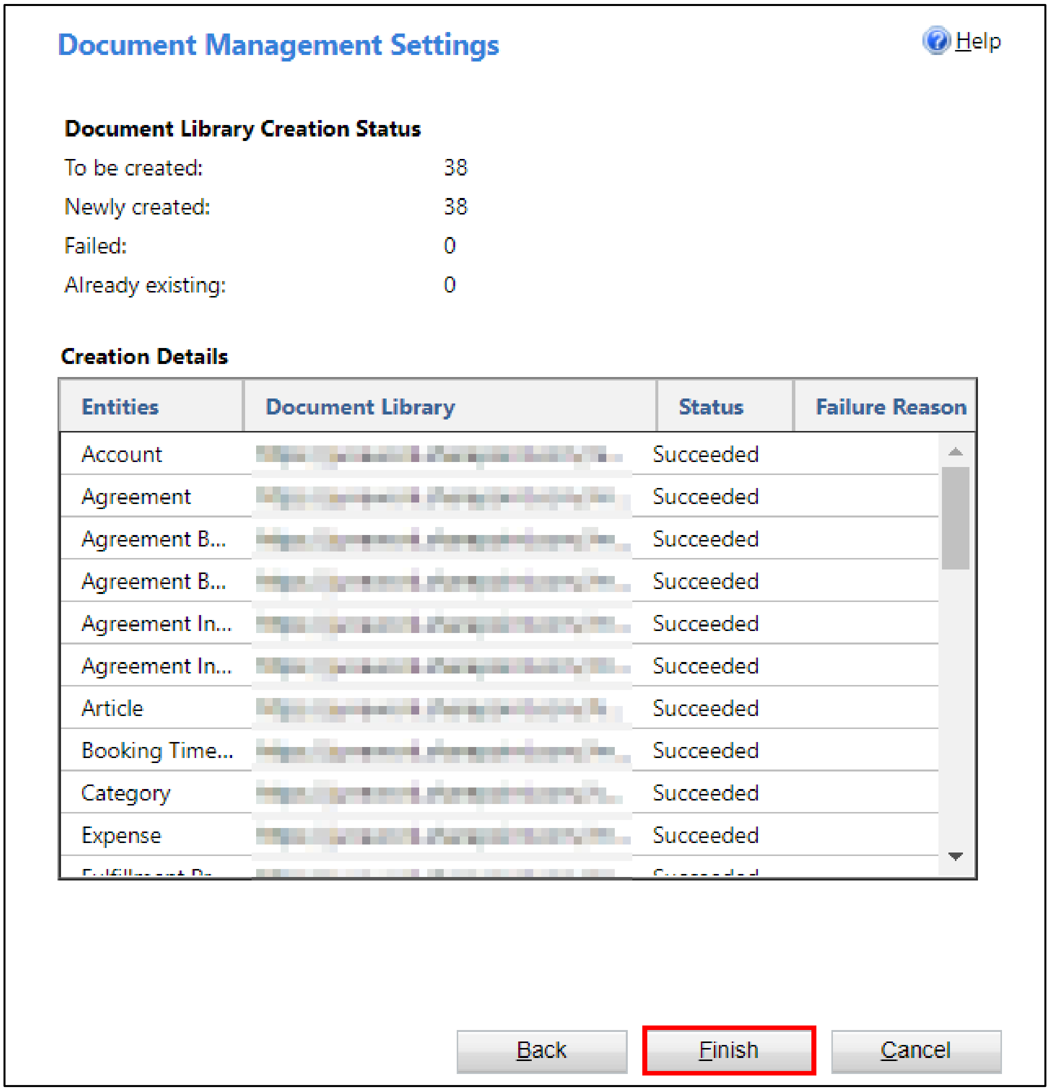
9) Select the **Entities** for which **Document Management** needs to be enabled →Enter the **URL of active SharePoint sites** where you want to store documents → Click on **Next.**



10) Click on **Next.**



11) Click on **Finish**.

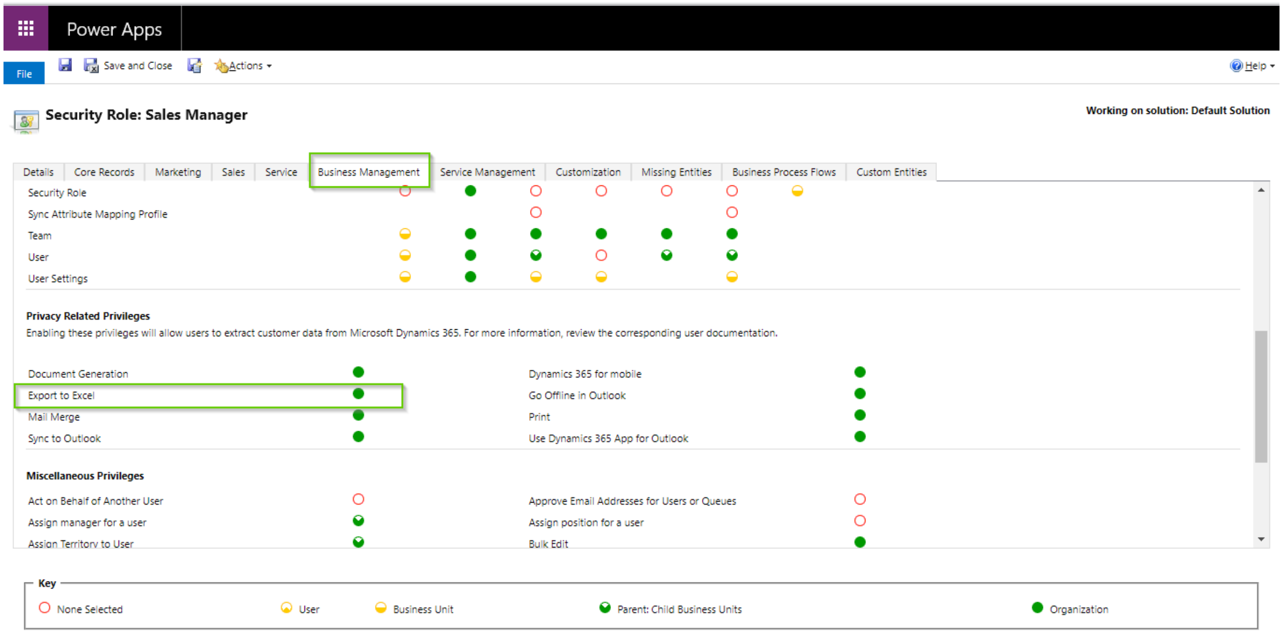


Once this is done, you can easily export and upload reports related to selected Entities in the respective SharePoint site using Click2Export button.

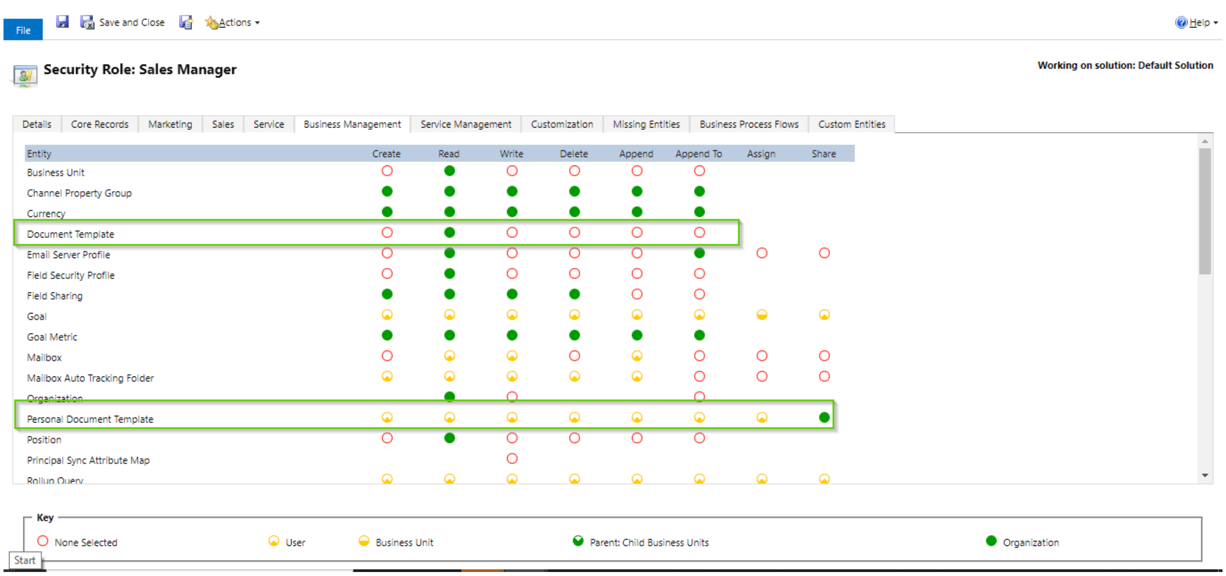
ESSENTIAL PRIVILEGES

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.



For Word & Excel Templates the following privileges are required:



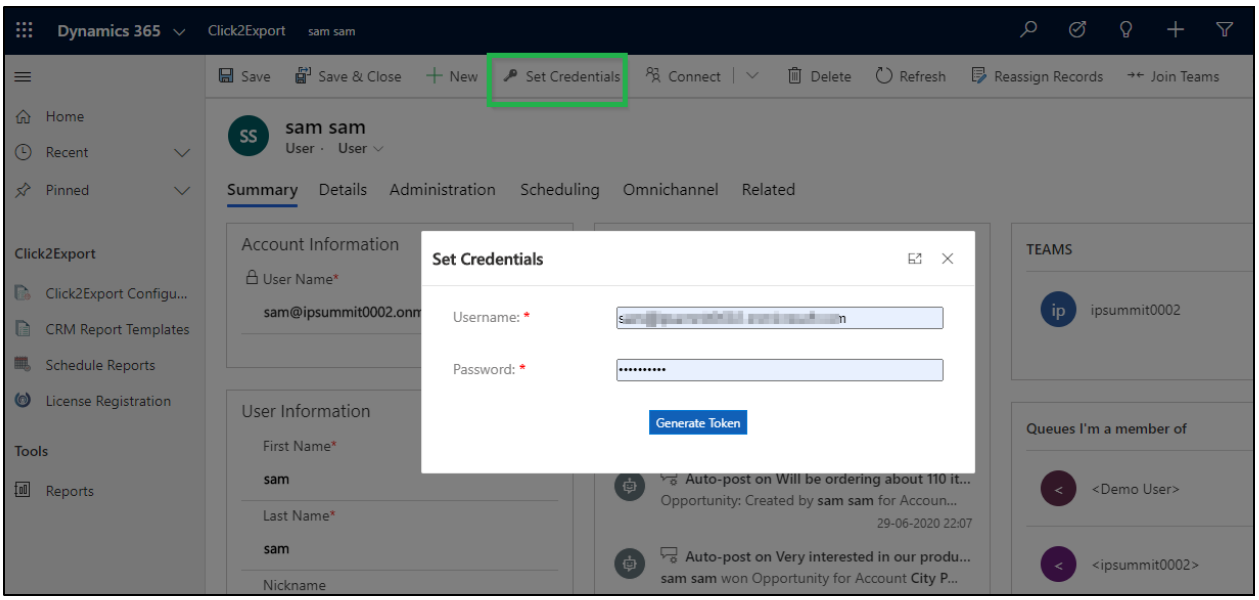
Note: Both privileges are required to export Excel Templates.

SET CREDENTIALS

This step is mandatory in case of **Scheduling and Export of Excel/Word templates** (if PDF format is selected) using Clik2Export 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.

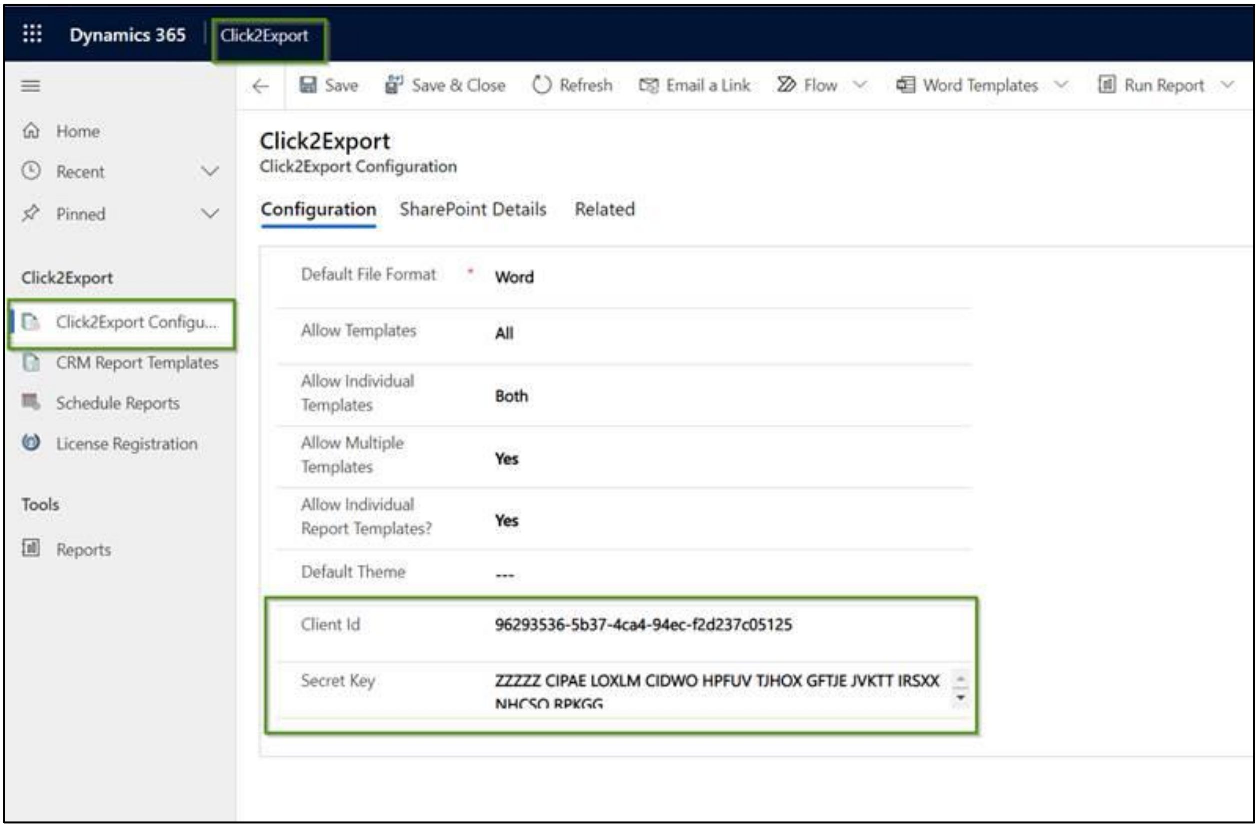
Follow the same steps and make sure the redirect URL is:

'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.

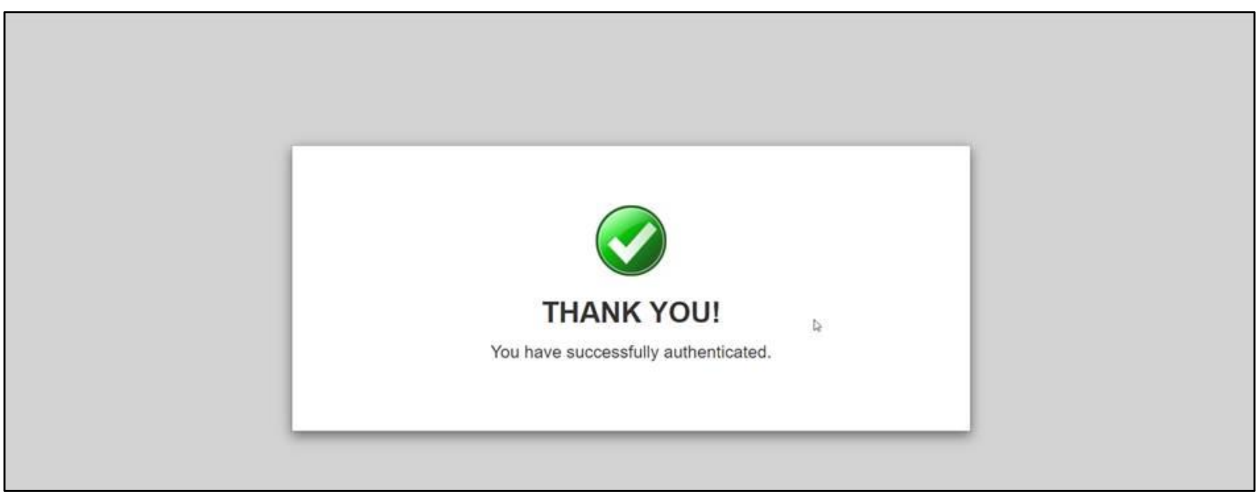
Secret Key: This is the value of the secret key for the app that you have created.



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.

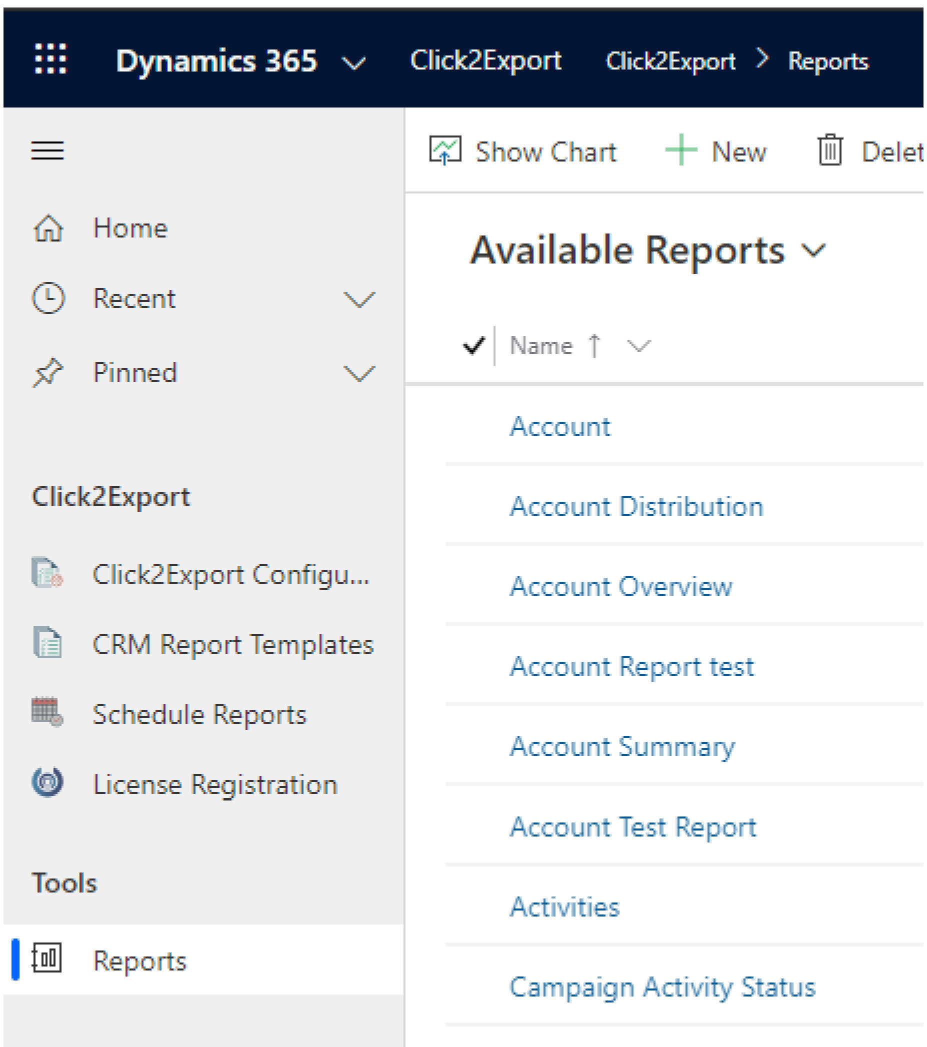
There are four types of CRM Report Template.

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

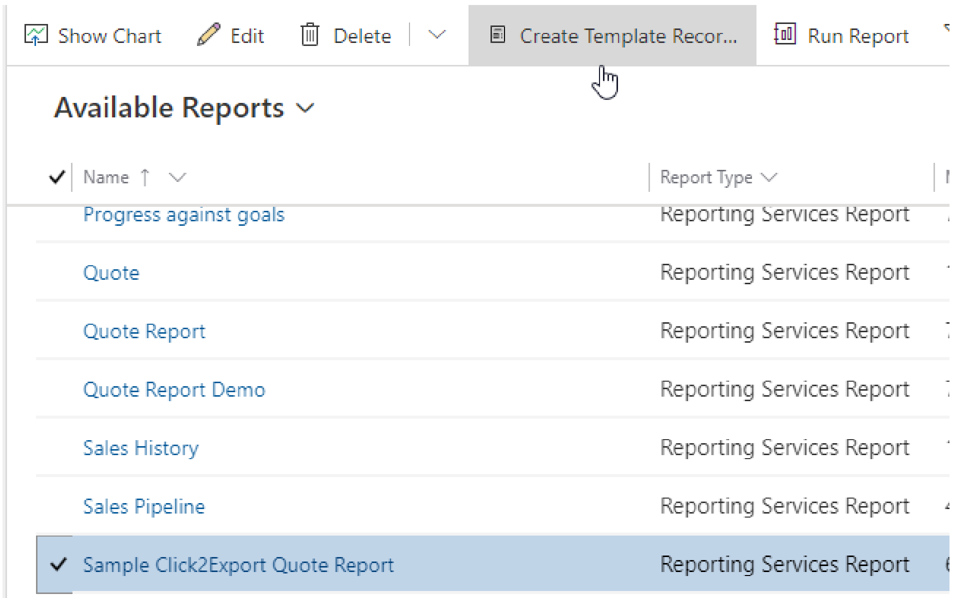
I. SSRS Template:

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

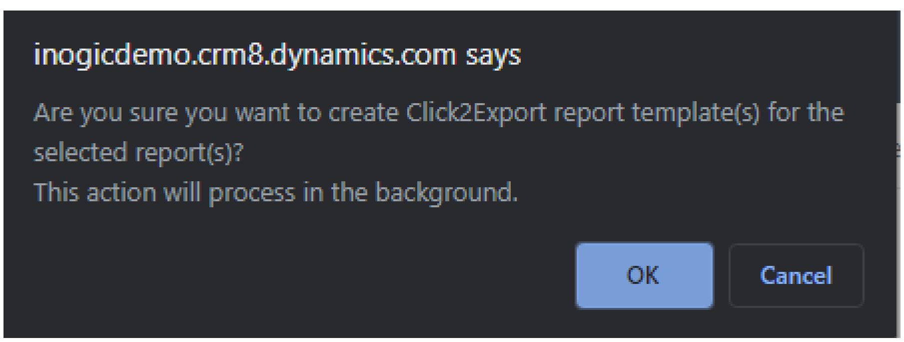
Open Click2Export App and then select Reports.



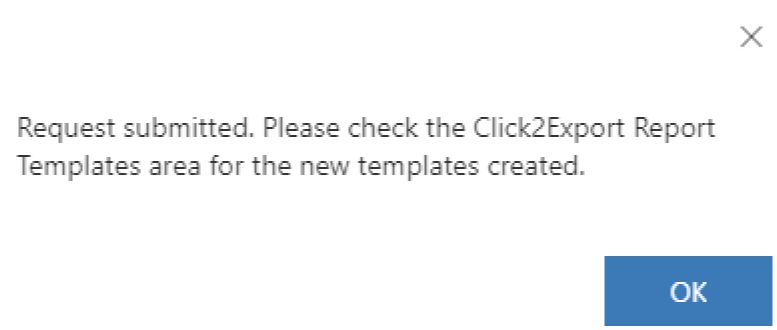
Select the reports that need to be used for quick export using Click2Export then click on Create Template Record button from the ribbon.



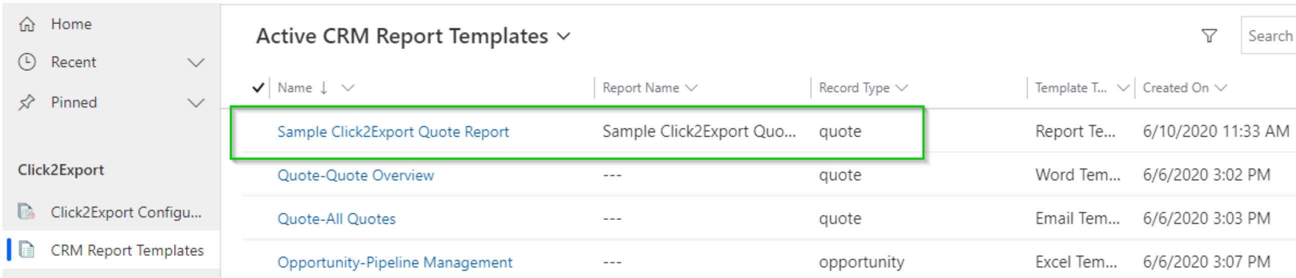
A confirmation dialog box will appear --> Click on OK.



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.

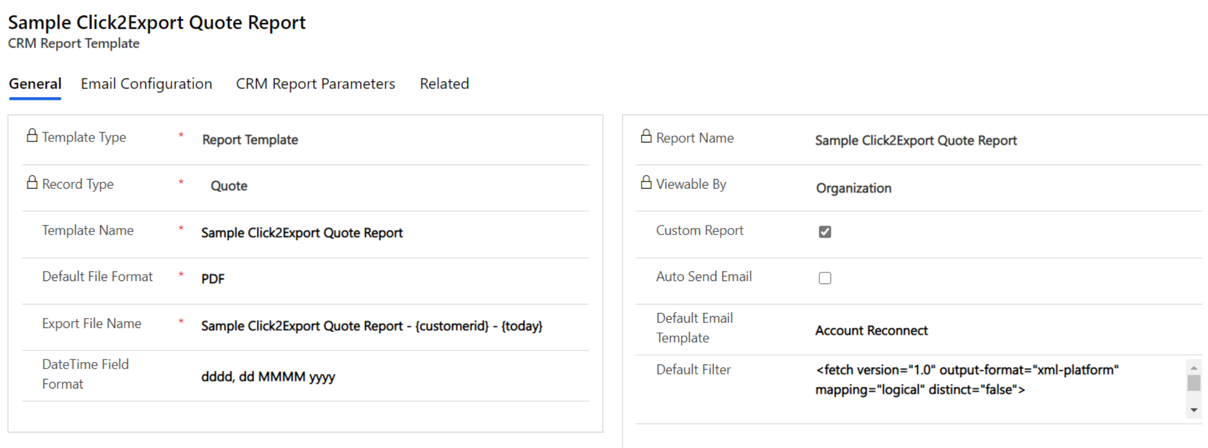


You can check the report templates created in the CRM Report Templates Area added in Click2Export App --> CRM Report Templates.



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

General:



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.

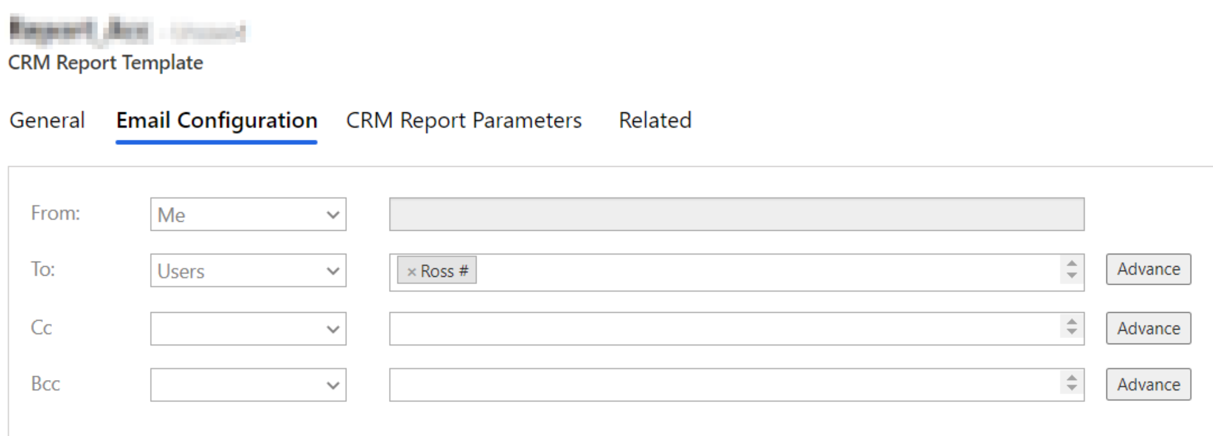
Auto Send Email: If enabled, it sends email automatically with the attached exported file, while performing the action from Click2Export UI or else it'll open up the Email Window with all the necessary details populated and then you can hit send manually.

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.



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**.

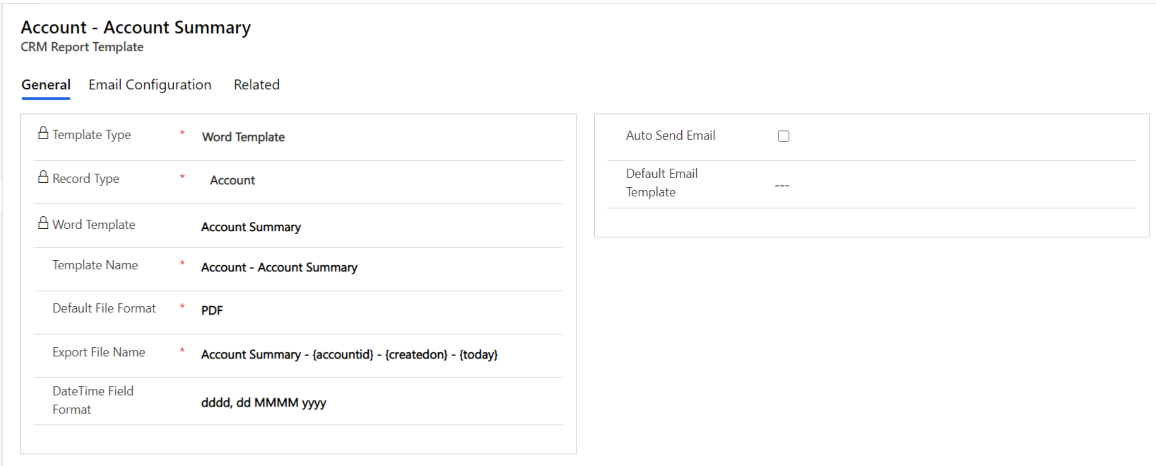
STEPS TO CREATE WORD TEMPLATE:

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:



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.

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: 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:

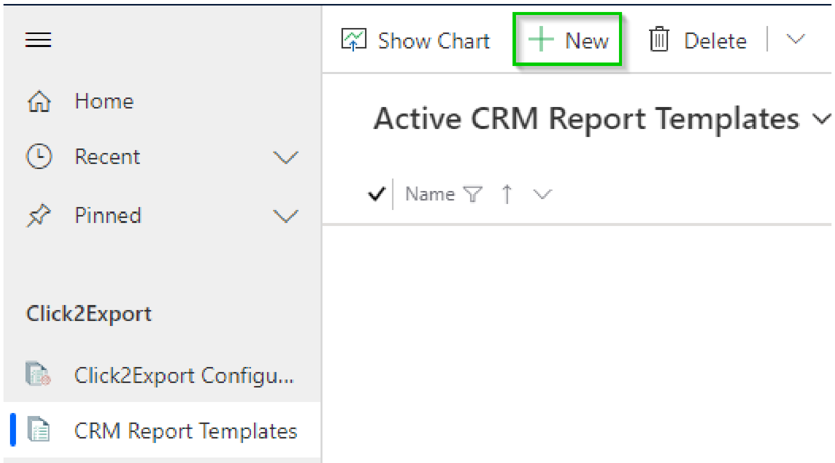
The next section is 'Email Configuration'. To know more about this section, please click here.

III. EXCEL TEMPLATE

STEPS TO CREATE EXCEL TEMPLATE:

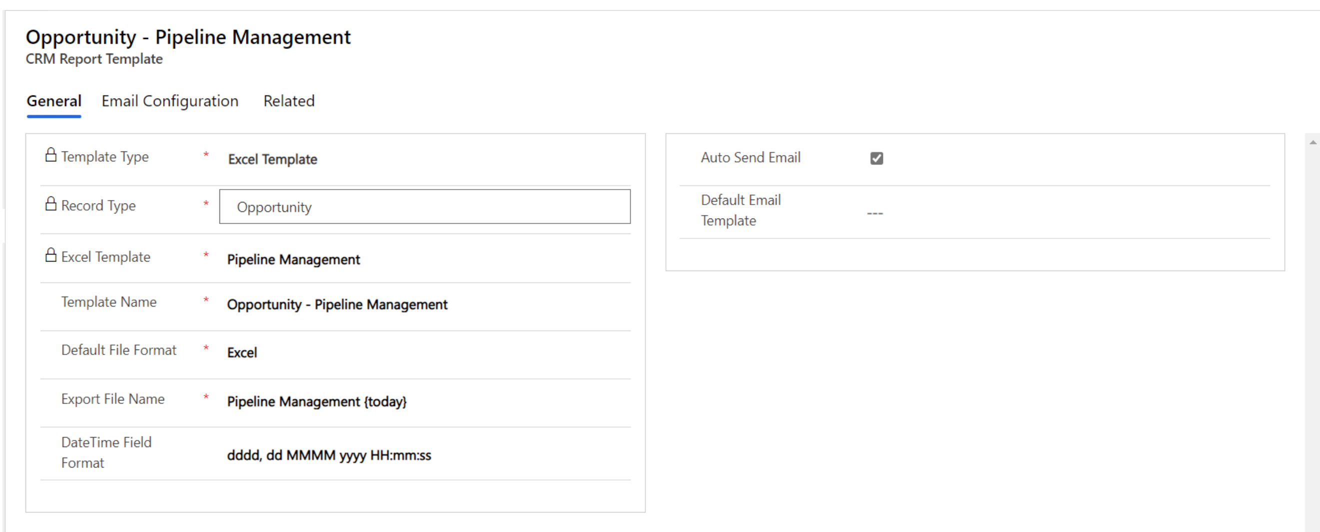
This section will guide you through the process of creating CRM Report Template for Excel Template.

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



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

General:



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).

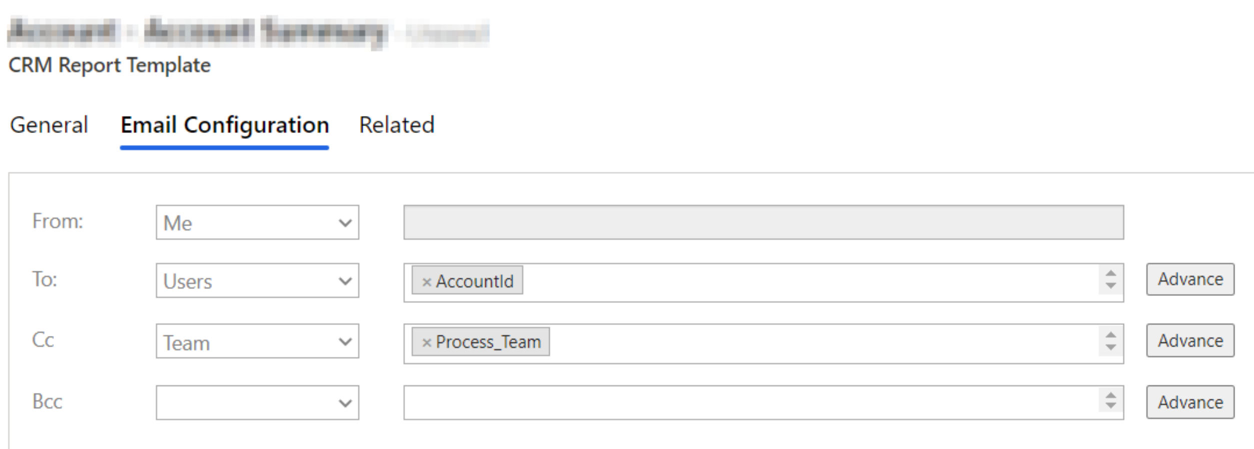
DateTime Field Format: This field decides in what format Date & Time should be represented while exporting the report if Export File Name contains a DateTime field. It should have a valid DateTime format for e.g. - mm/dd/yyyy for 03/23/2021, mm/dd/yyyy h:mm tt for 03/23/2021 5:50 AM. It will reflect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



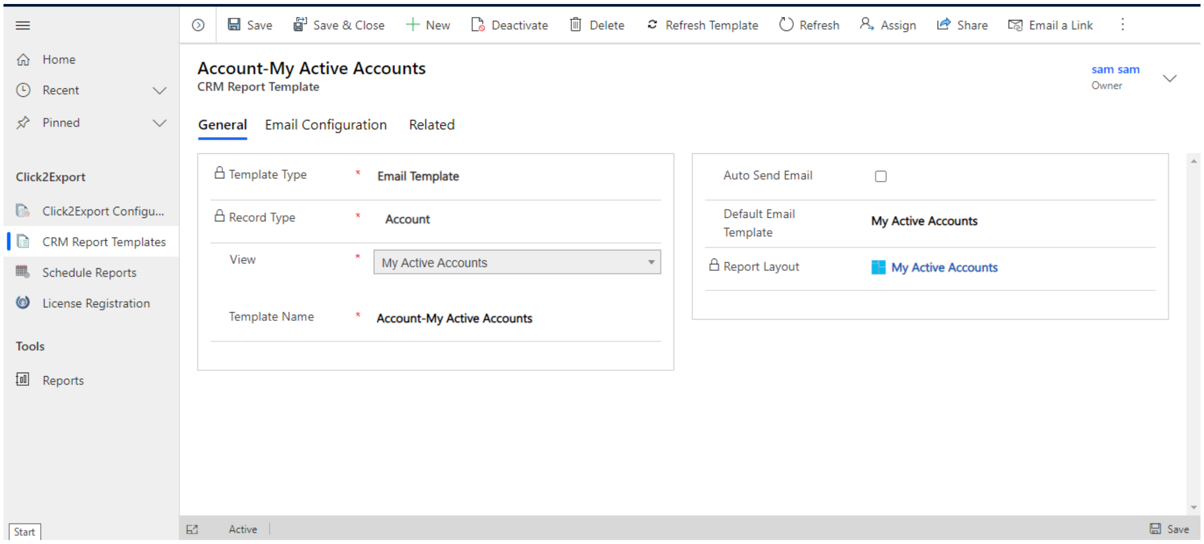
IV. Email Template (CRM Views Data)

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.

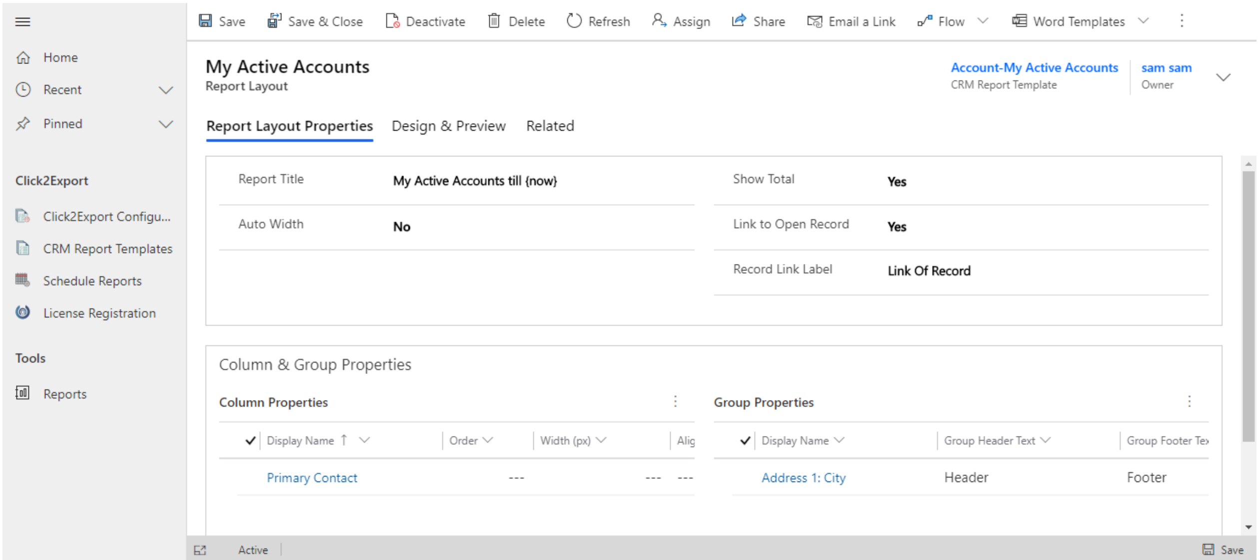
Template Name: It is automatically populated once 'Record Type' and 'View' is selected.

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.



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 this, then total row will be visible in table.

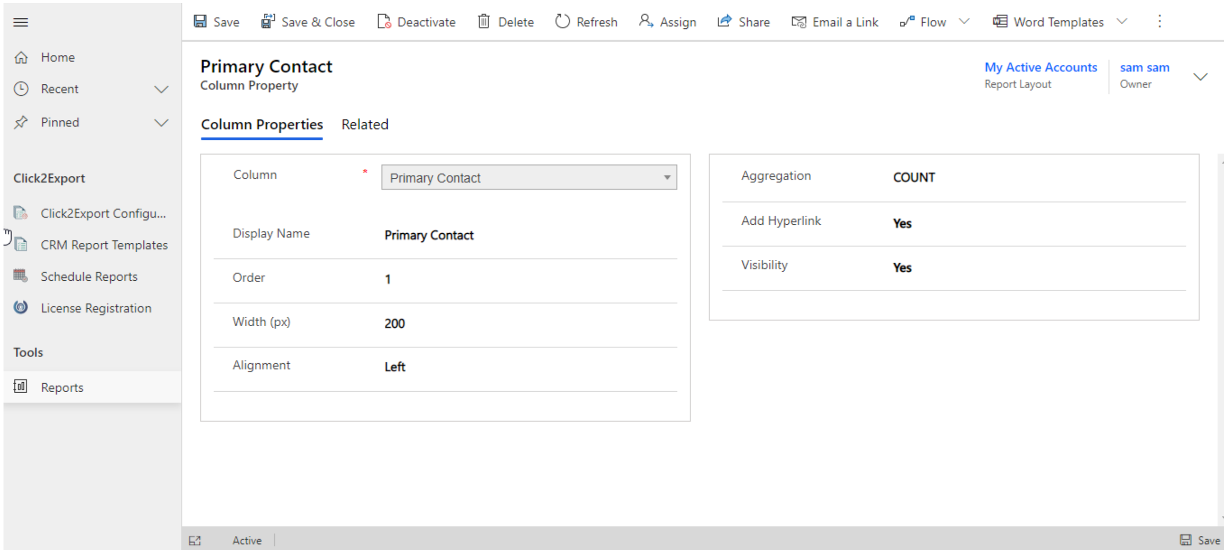
Auto Width: If this field is set to 'Yes' then width for all columns will be set as 'auto' i.e. the column width will depend upon the content of column. This setting will override the width which is specified in column property or selected view. If it is set to 'No' then width of column will be set as 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.



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.

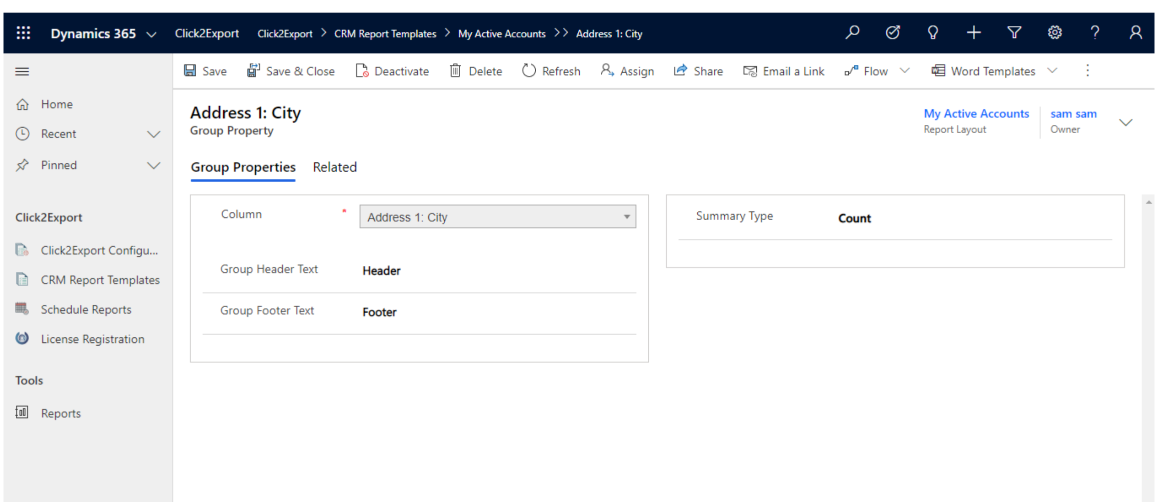
Aggregation: This field will enable you to summarize or get total of any column. Here, you will get the following options depending upon the field type of selected column - Count, Min, Max, Average, Sum.

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.

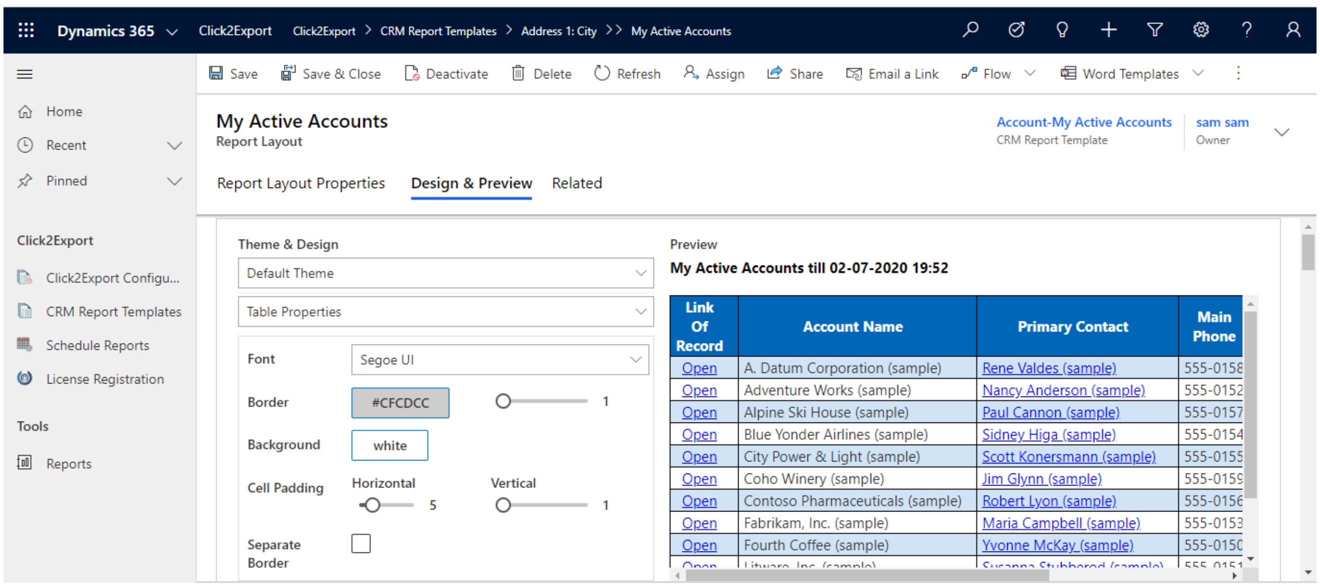
Group Footer Text: In this field you can add text for footer of group column.

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

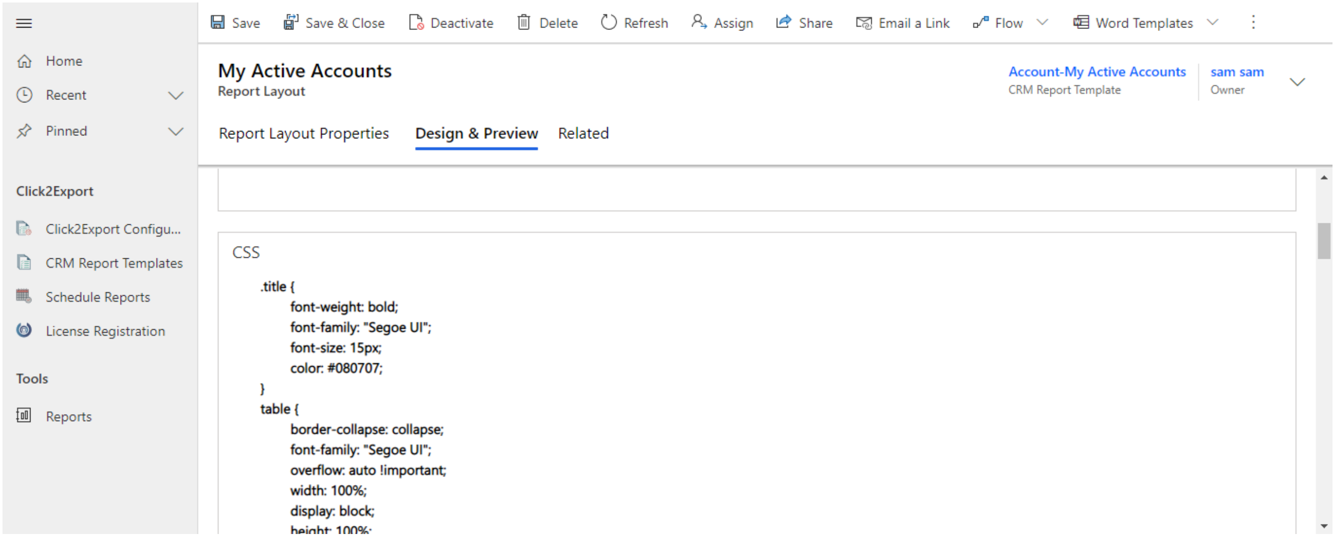
Design & Preview:

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.



CSS Field:



Email Configuration:

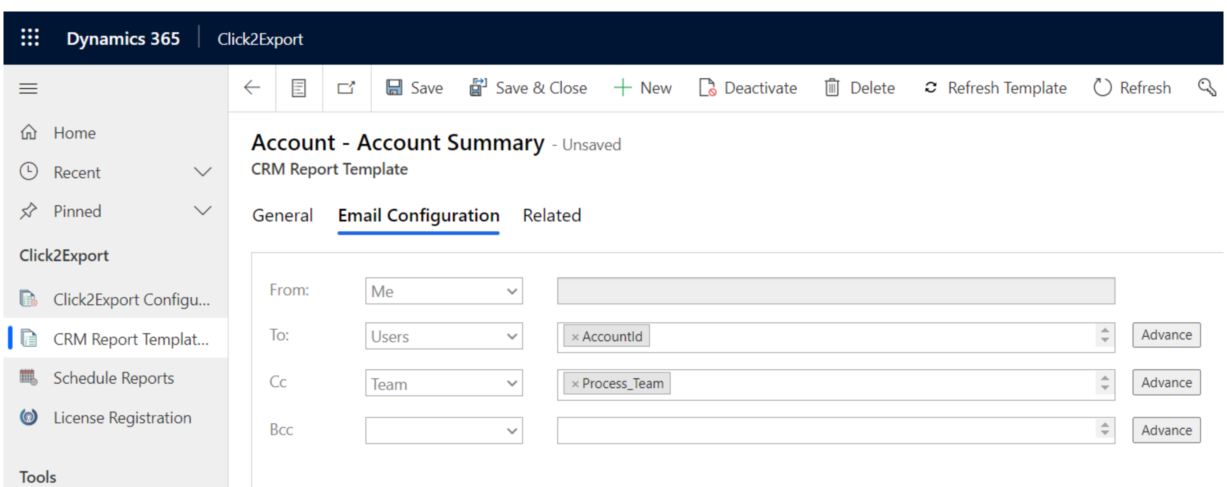
The next section is 'Email Configuration

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.

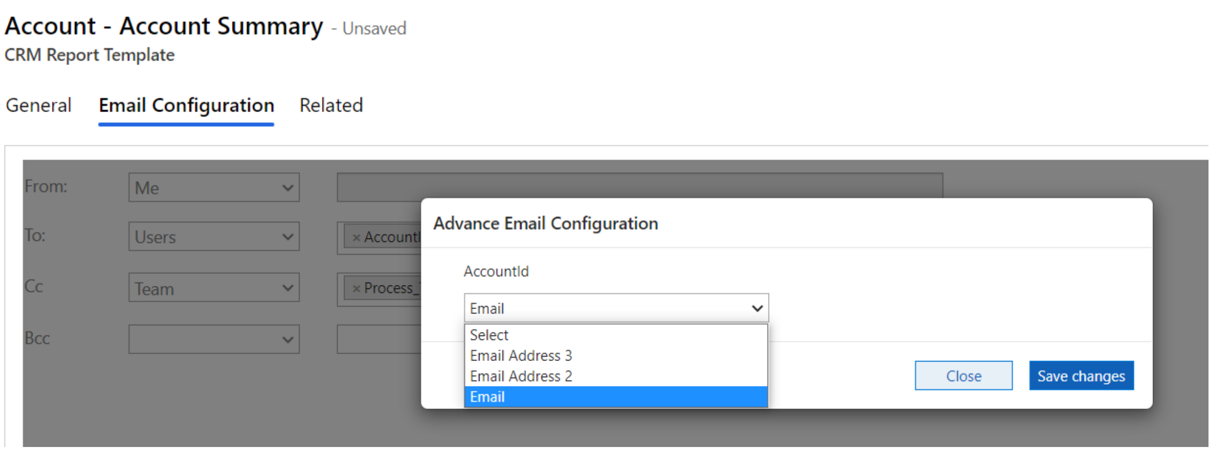
2.Queue – If you select Queue then all the queues present in the environment will be enlisted while selecting the data.

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.

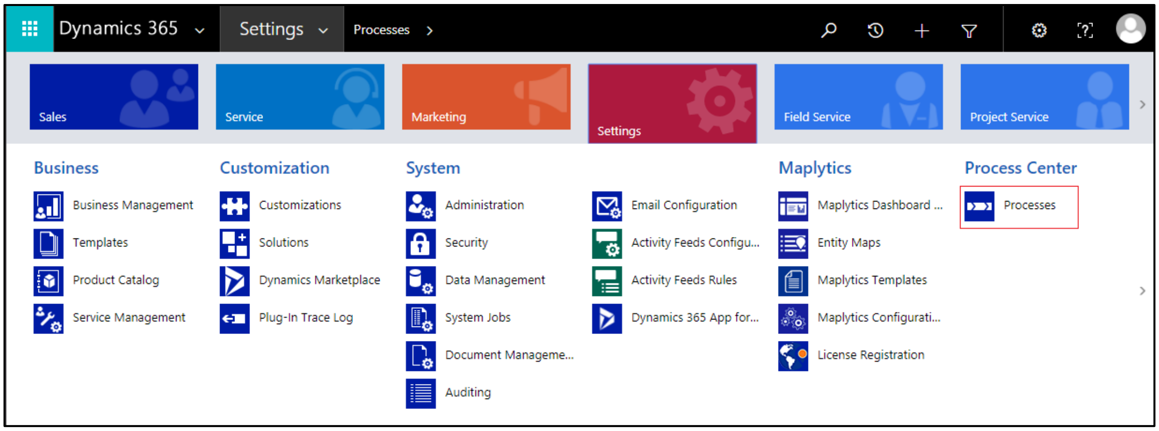


Note: For Email and Excel template Dynamic and Manager option is not available.

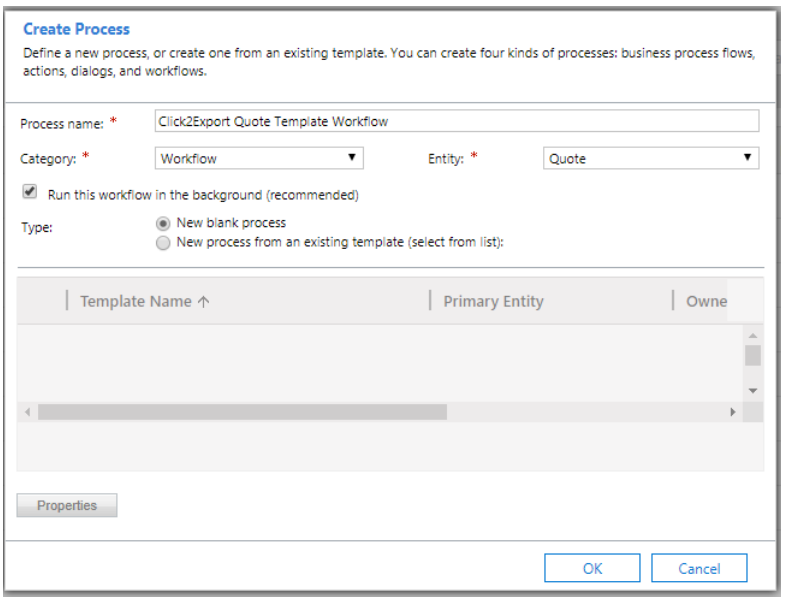
CREATE CLICK2EXPORT WORKFLOW – WORD TEMPLATES & REPORTS

WORD TEMPLATES

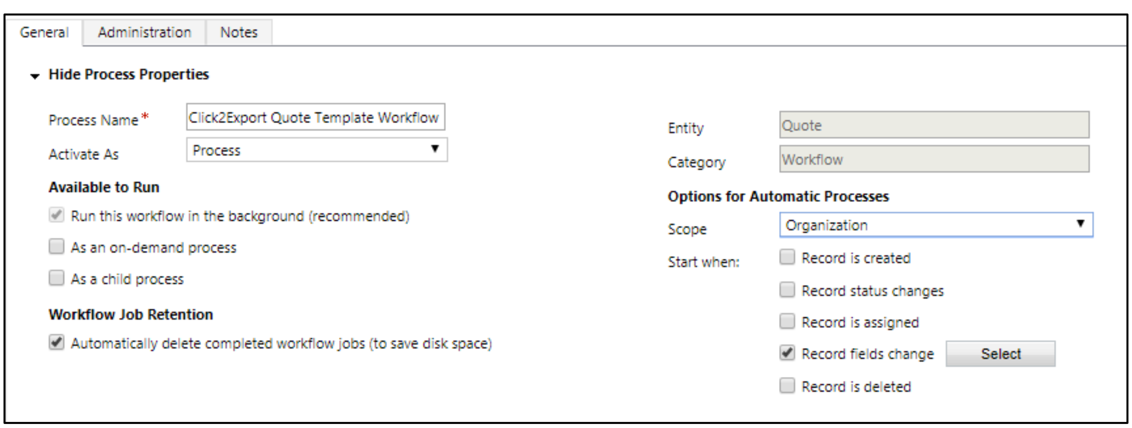
1. Click2Export now supports exporting the Dynamics CRM Word Templates using Click2Export workflow. To create a workflow, navigate to **Settings > Processes** and click on ‘**New’** to create a new workflow.



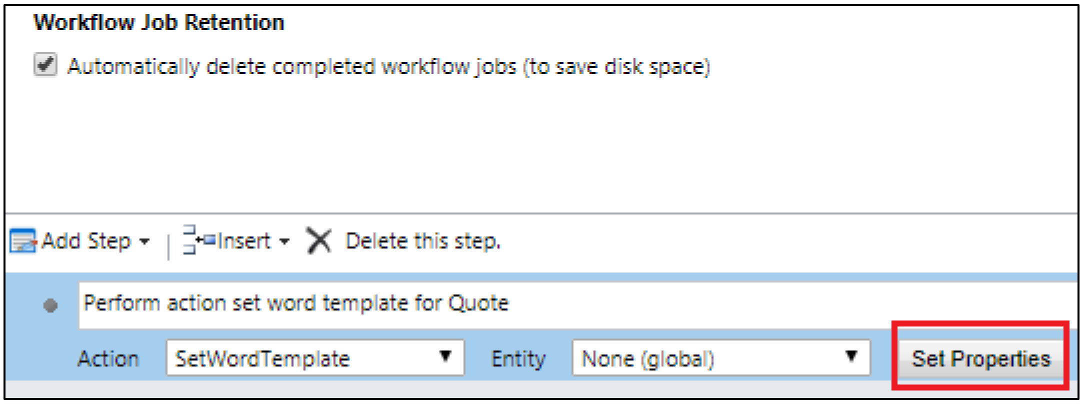
2. Enter the '**Process Name'**, select the **'Category'** as **'Workflow'**and **'Entity'** for which you want to create this workflow. Click on **'OK'.**



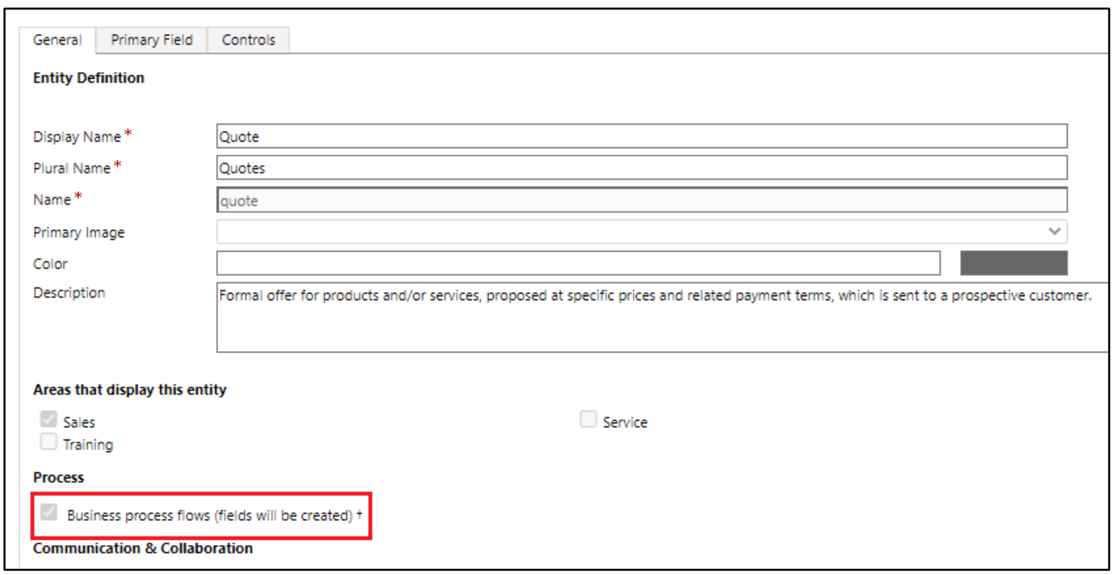
3. Here you can select whether you want the Workflow to be On Demand or trigger on a change of Options for Automatic Processes.

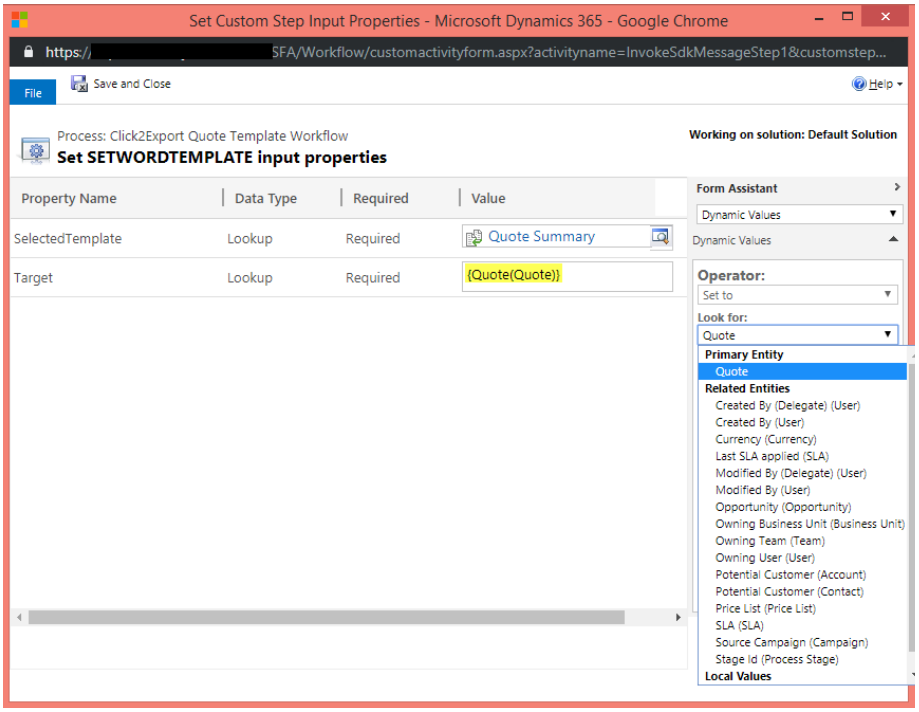


4. First user needs to click on **'Add Step'** and add **Perform Action** step that is predefined by Microsoft to select the appropriate Action for required word template. Select **Action** as **SetWordTemplate** option and **Entity** as **None (global)**.

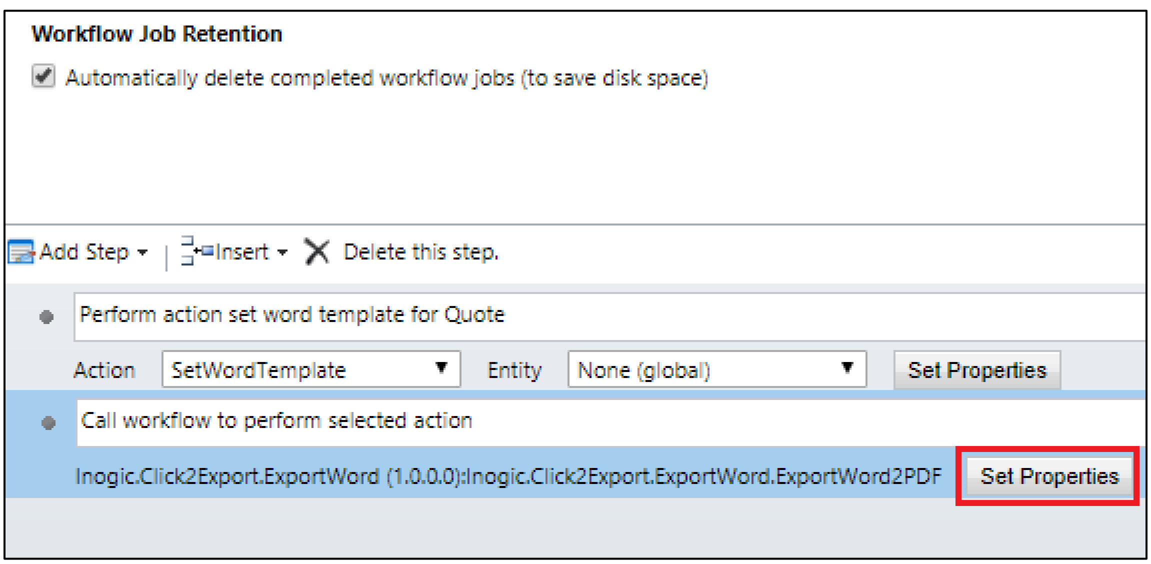


5. Now click on **'Set Properties'** of **Perform Action** step and select the required Word Template in **SelectedTemplate** section and required **Entity** in **Target** section. In order to select the required entity in Target section, it should have Business Process Flows ticked in the entity settings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

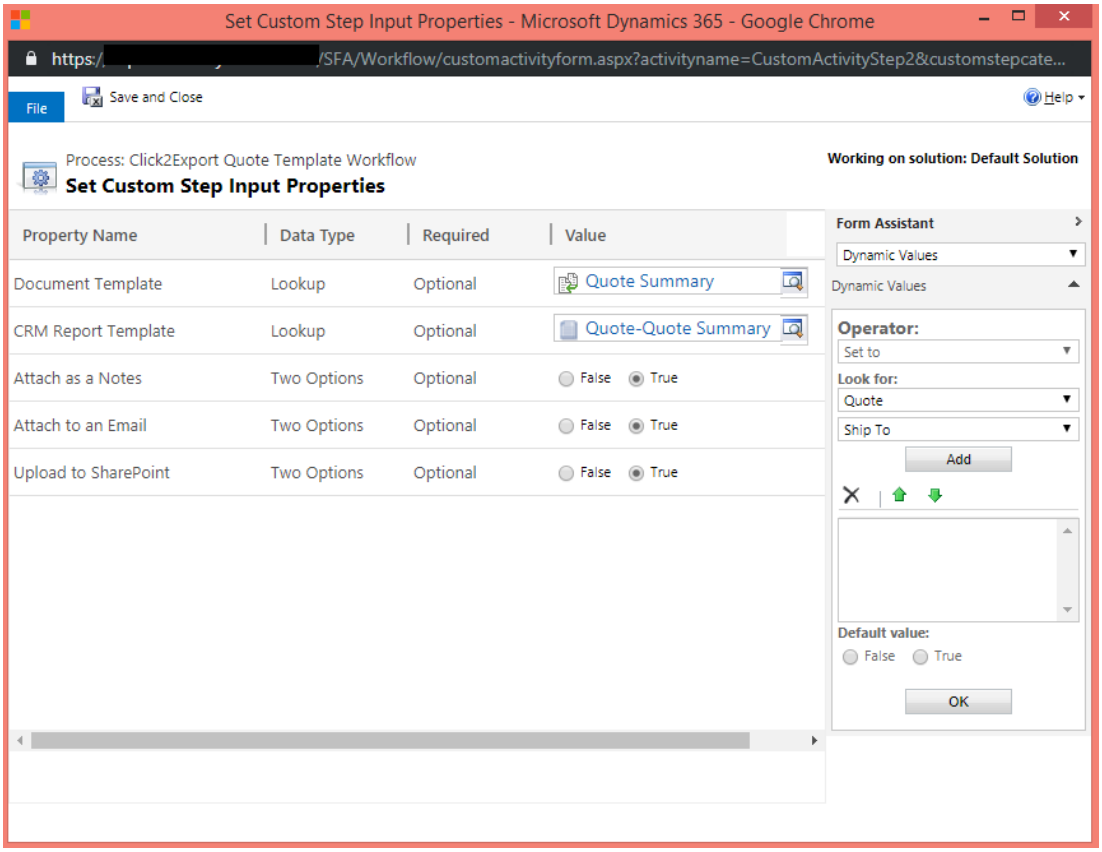




6. Click2Export ships with one workflow assembly namely **'Inogic.Click2Export.ExportWord.ExportWord2PDF'.** This step is required to call the workflow for performing the selected action.
7. Now click on **'Set Properties'** for **Inogic.Click2Export.ExportWord.ExportWord2PDF**

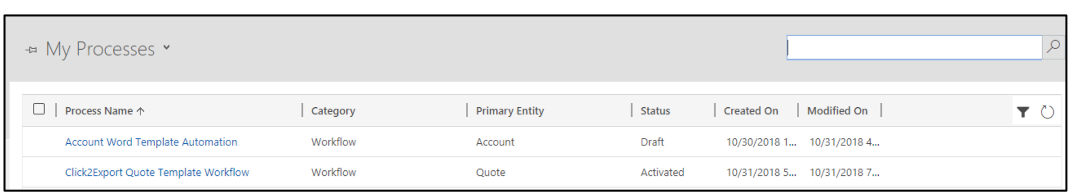


8. Now on the **'Document Template** select required **'MS Document Template'** from the drop down options. In CRM Report Template select the required **'CRM Word Template'** for the selected entity.
9. User can select the required action i.e. **Attach as a Note, Attach to an Email** or **Upload to SharePoint**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



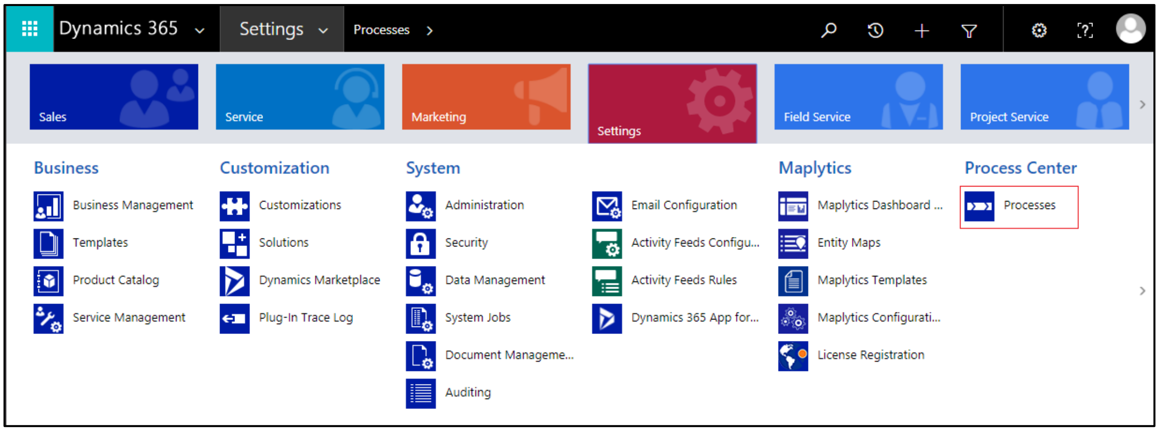
Document Template: Select the document that needs to be converted to PDF.
CRM Report Template: This will be the Report Template that has been created for the Document Template selected above.
Attach as a Notes: If marked as True, then it will attach the converted PDF against the record as a Note else 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'.**

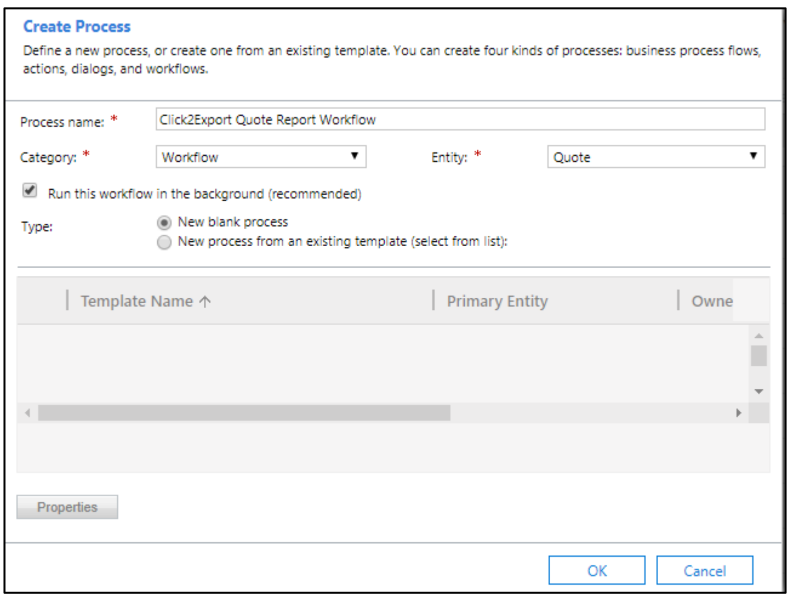


SSRS Template Workflow

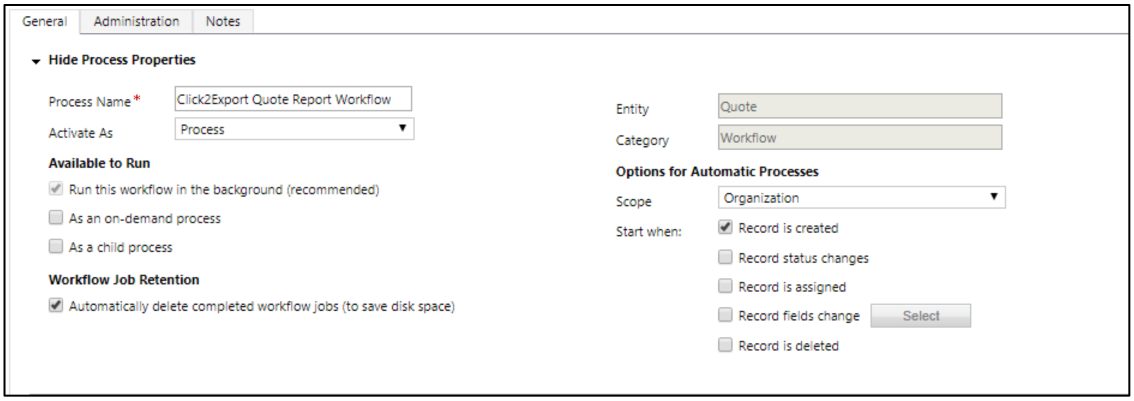
1. Click2Export now supports exporting the Dynamics CRM Report Templates using Click2Export workflow. To create a workflow, navigate to **Settings > Processes** and click on ‘**New’** to create a new workflow.



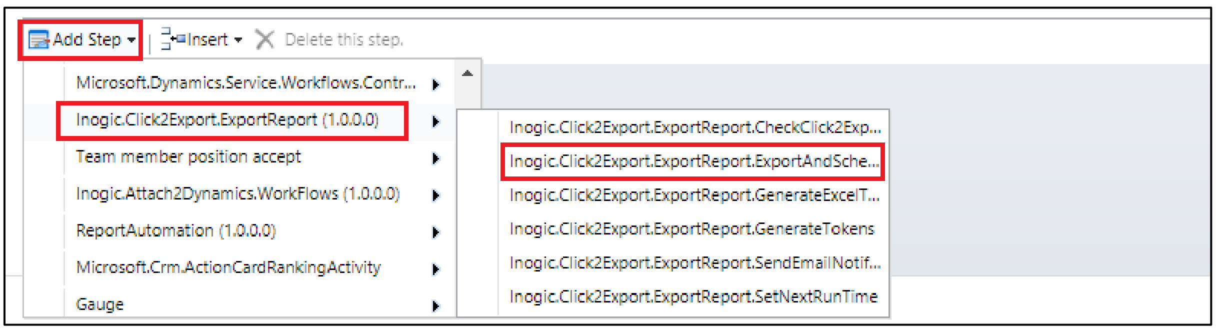
2. Enter the ‘**Process Name’**, select the **‘Category’** as **‘Workflow’**and **‘Entity’** for which you want to create this workflow. Click on **‘OK’.**



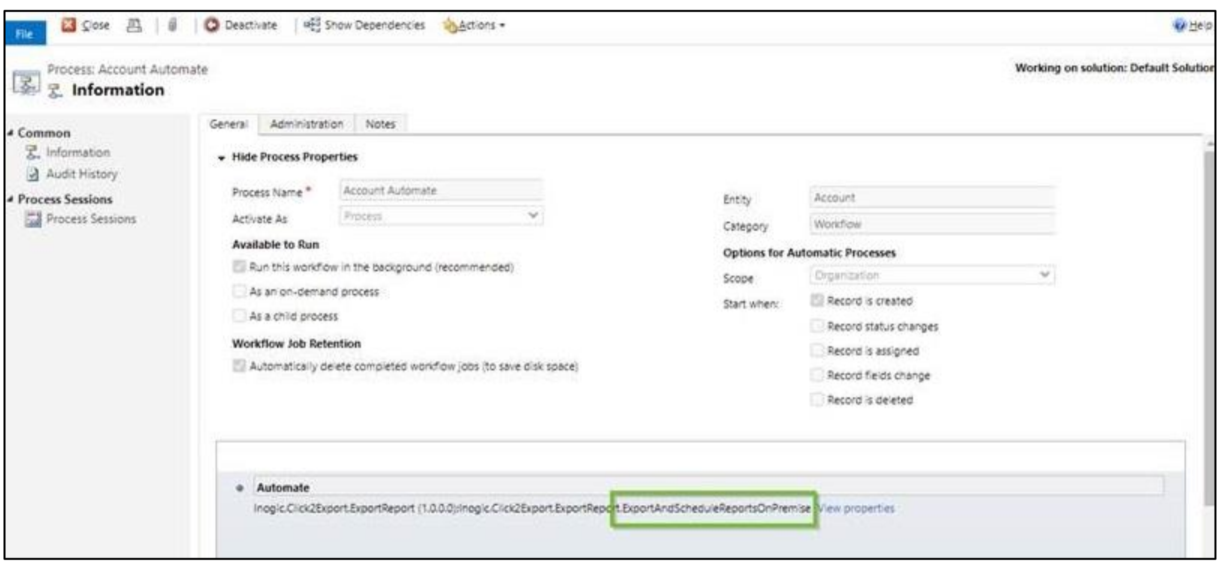
3. Here you can select whether you want the Workflow to be On Demand or trigger on a change of Options for Automatic Processes.



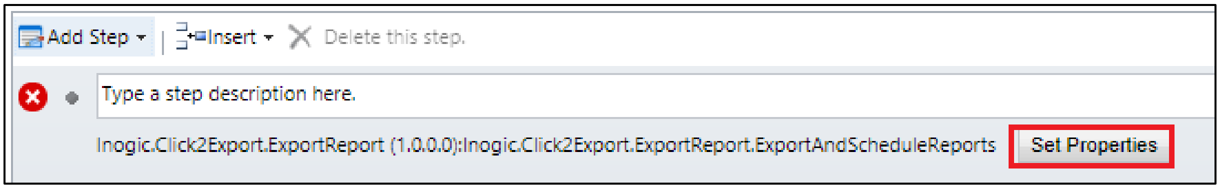
4. First user needs to click on **'Add Step'.** Click2Export ships with one workflow assembly namely **'Inogic.Click2Export.ExportReport.ExportAndScheduleReports'.** This step is required to call the workflow for performing the selected action.



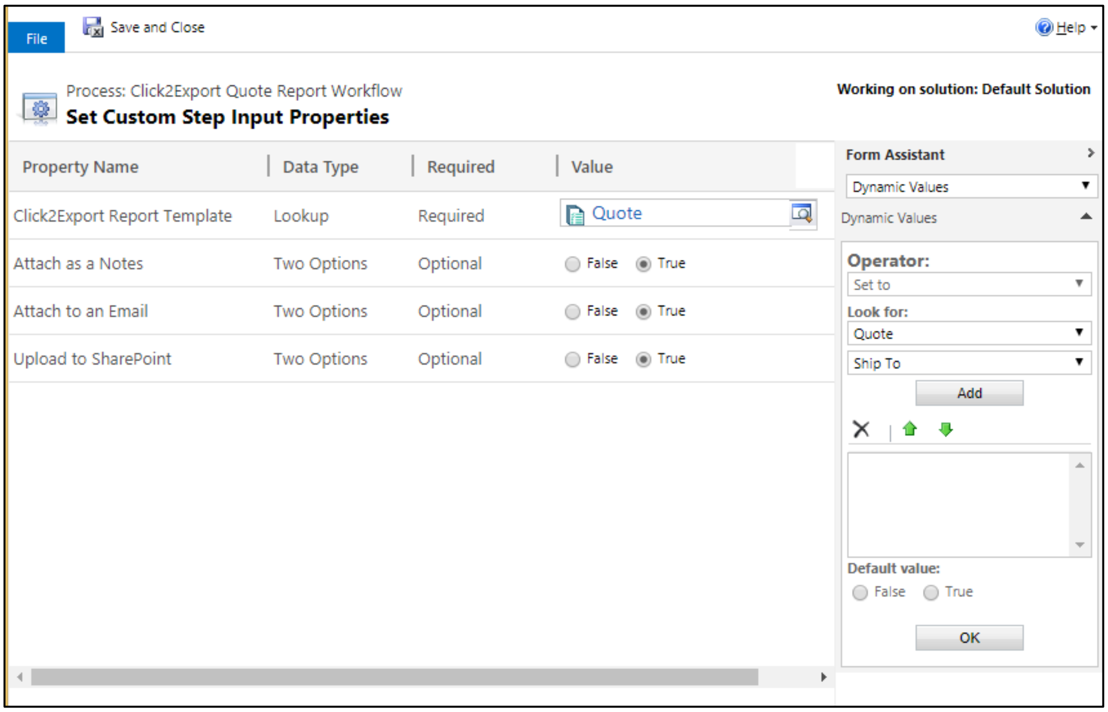
For **On-Premises**, the work flow assembly will be as follows:



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

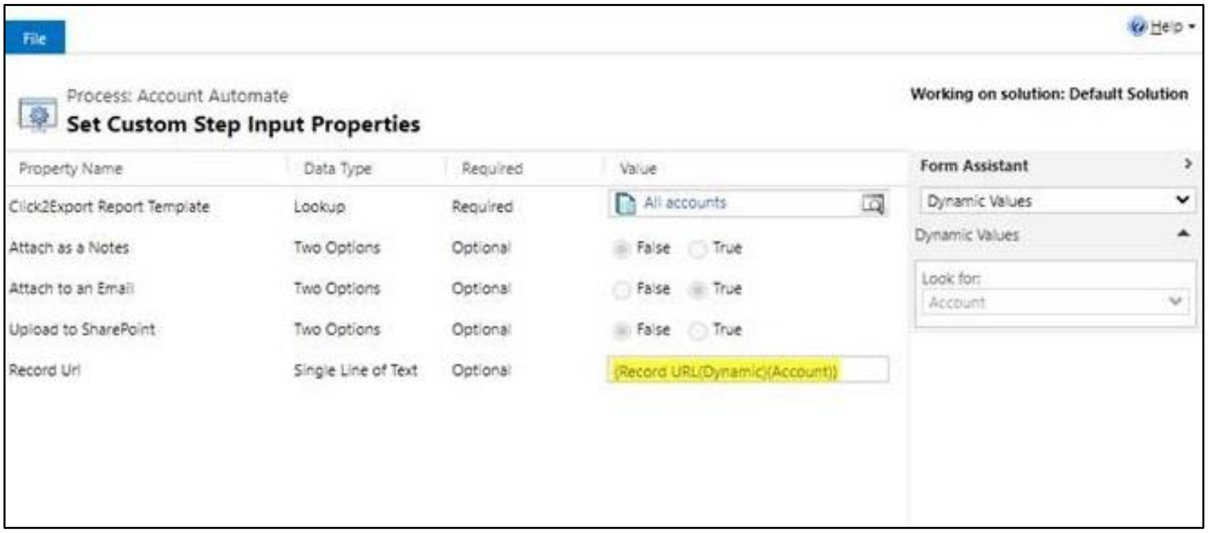


6. Now on the **'Click2Export Report Template** select required **'Report Template'** from the drop down options.
7. User can select the required action i.e. **Attach as a Note, Attach to an Email** or **Upload to SharePoint** as **True** for performing the workflow accordingly and click on **'Save and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

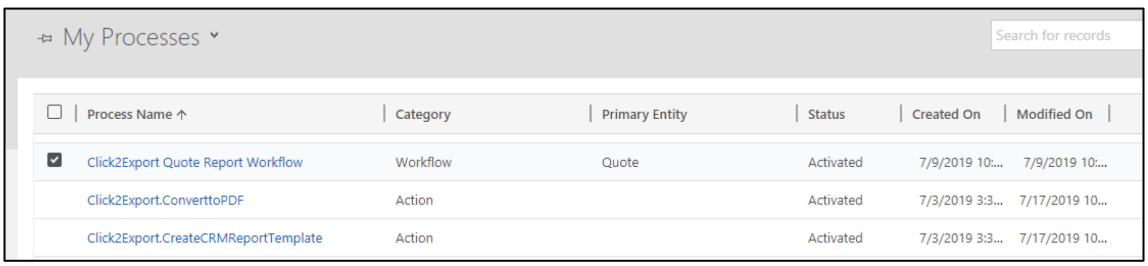


CRM Report Template: CRM Report Template for the SSRS report that you want to be converted.
Attach as a Notes: If marked as True, then it will attach the converted file against the record as a Note else it will not.
Attach to an Email: If marked as True, then it will attach the converted file in an email. 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:

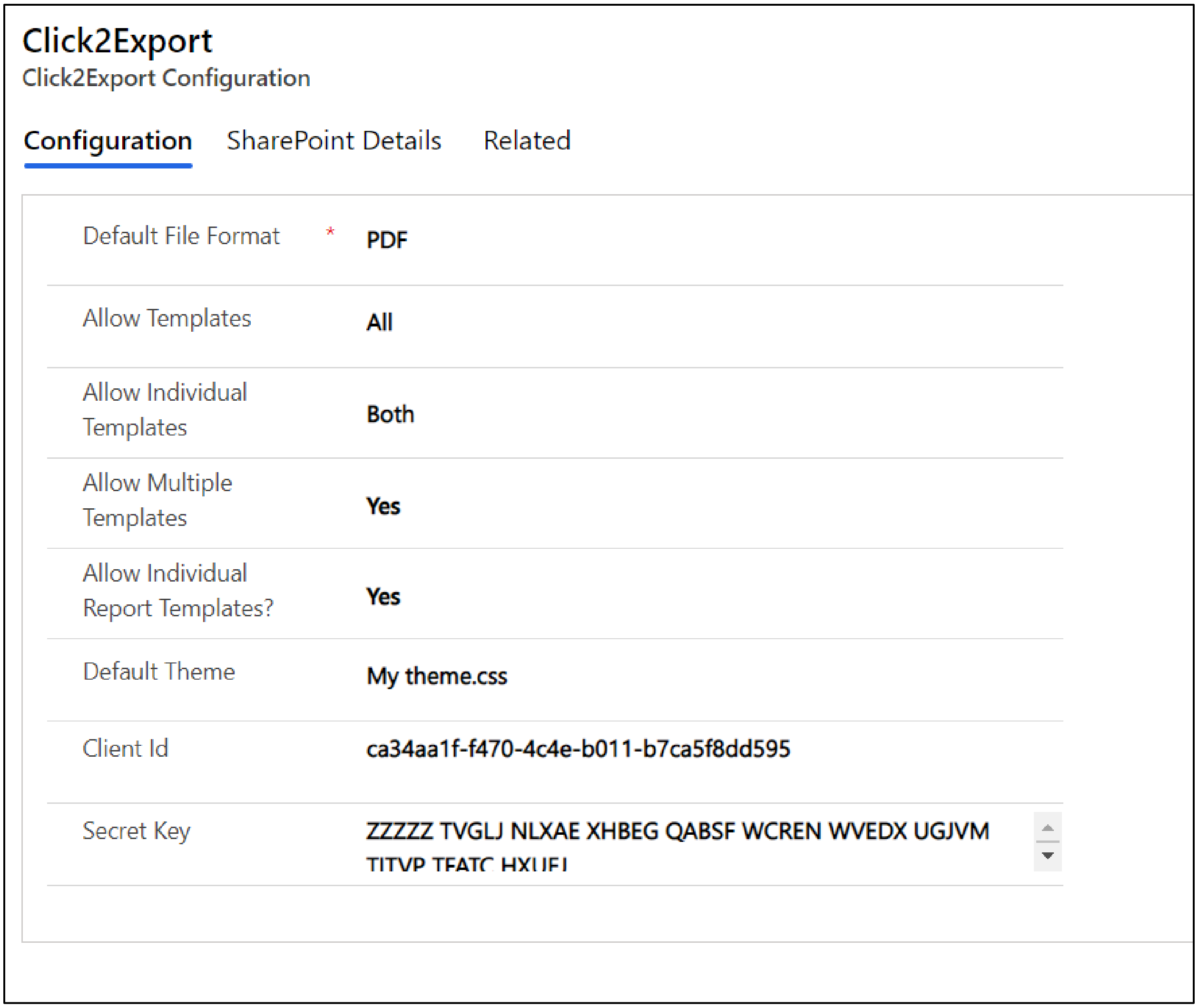


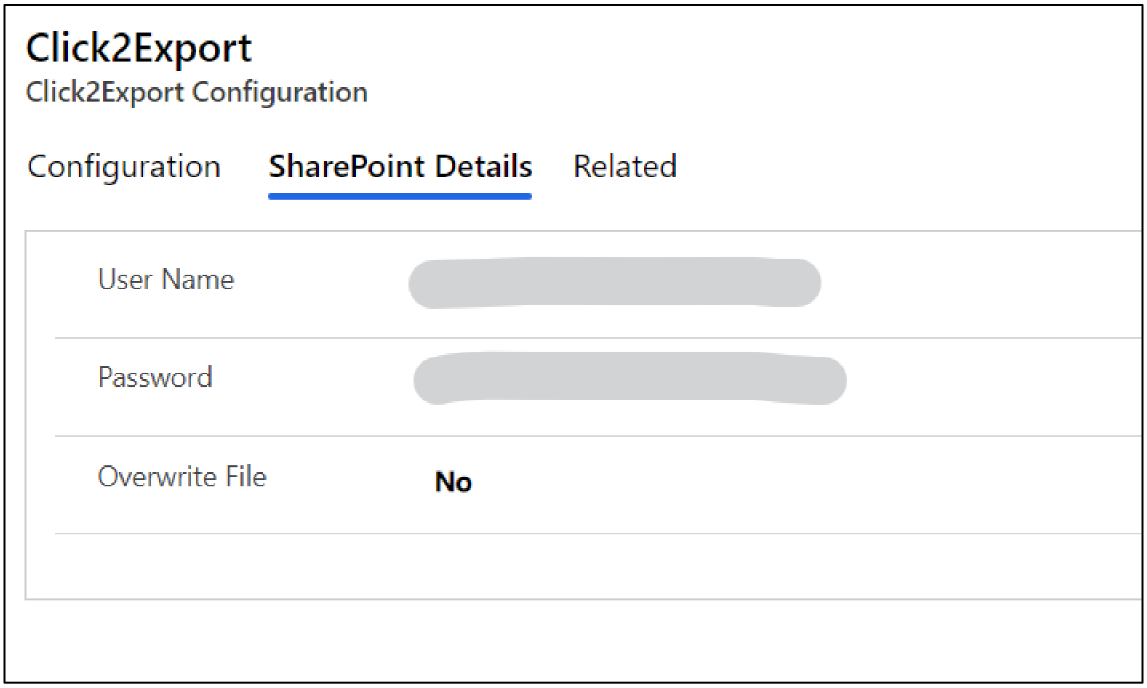
8. Now **'Save'** and then **'Activate'** the process.
9. You can now see the workflow in **'My Processes'.**



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
ZZZZZ TVGLJ NLXAE XHBEG QABSF WCREN WVEDX UGJVM



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.

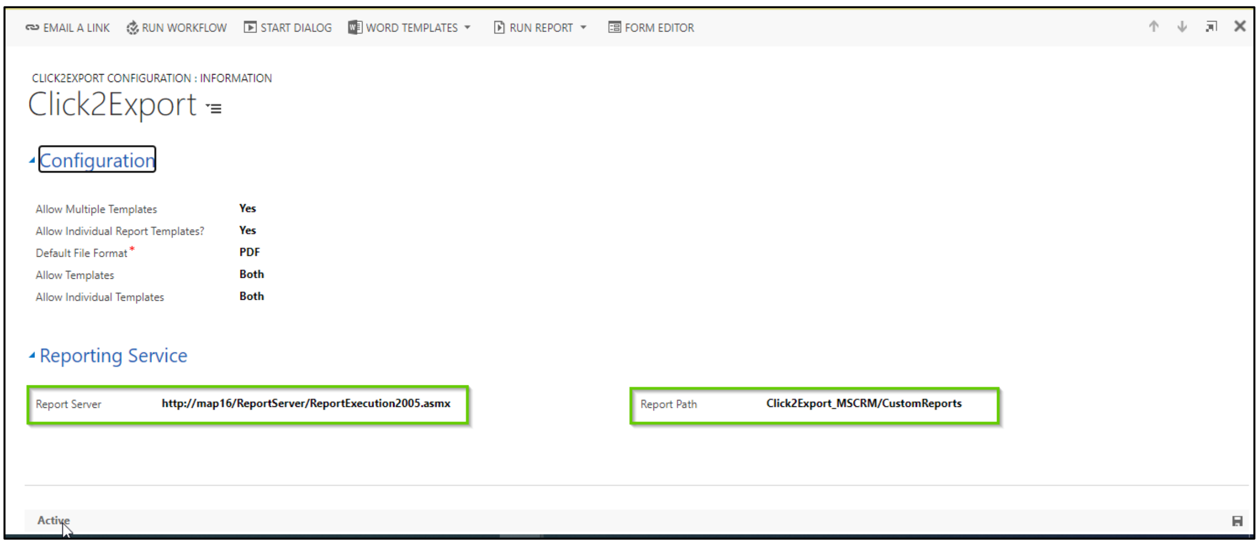
The 3 options you have in SharePoint Details are as follows,

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

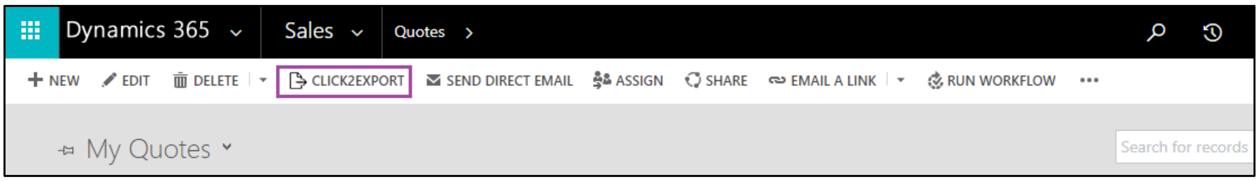
Only users with **Click2Export Administrator** role will be allowed to **"Create Report Templates"** and edit the CRM Report Templates. Configurations too can be managed by the Administrators only.

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.

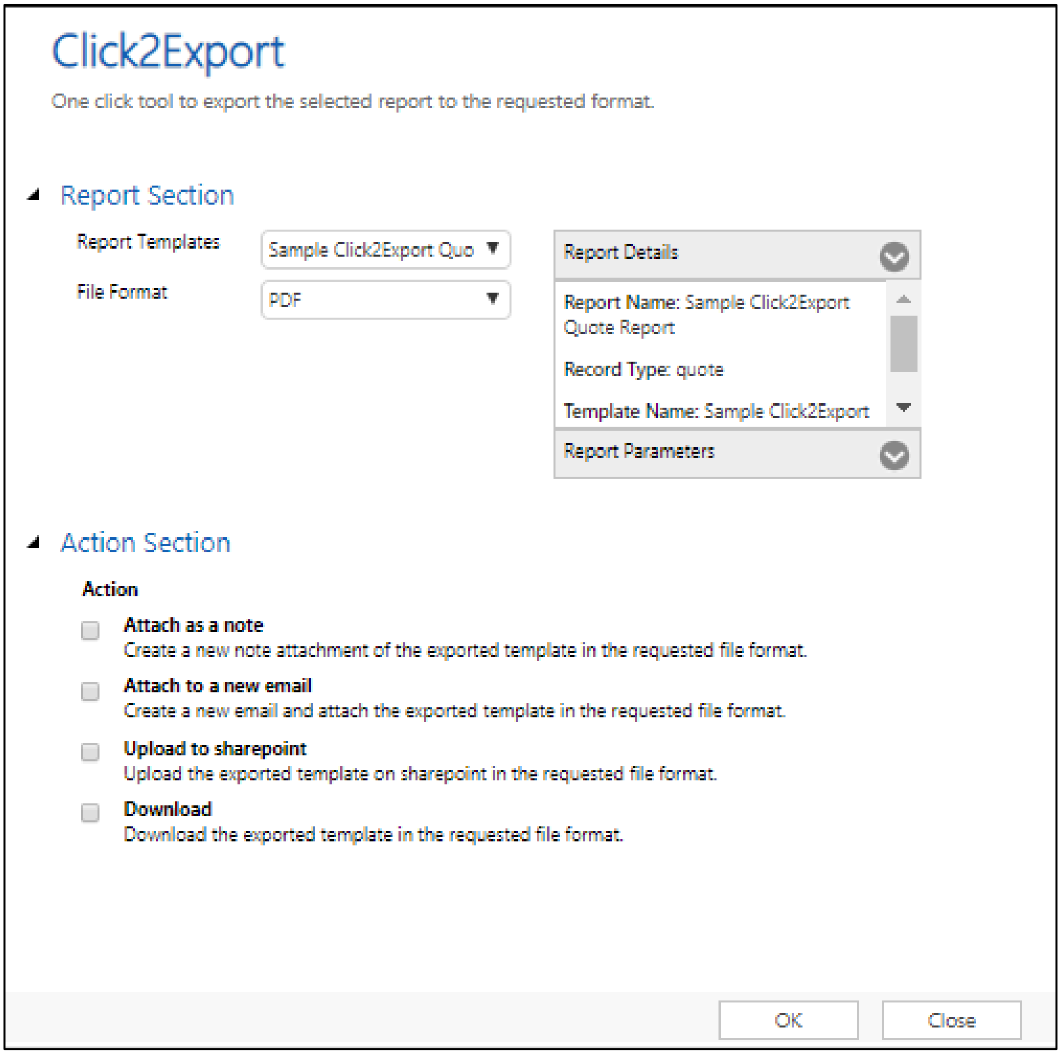
EXPORT REPORT

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.

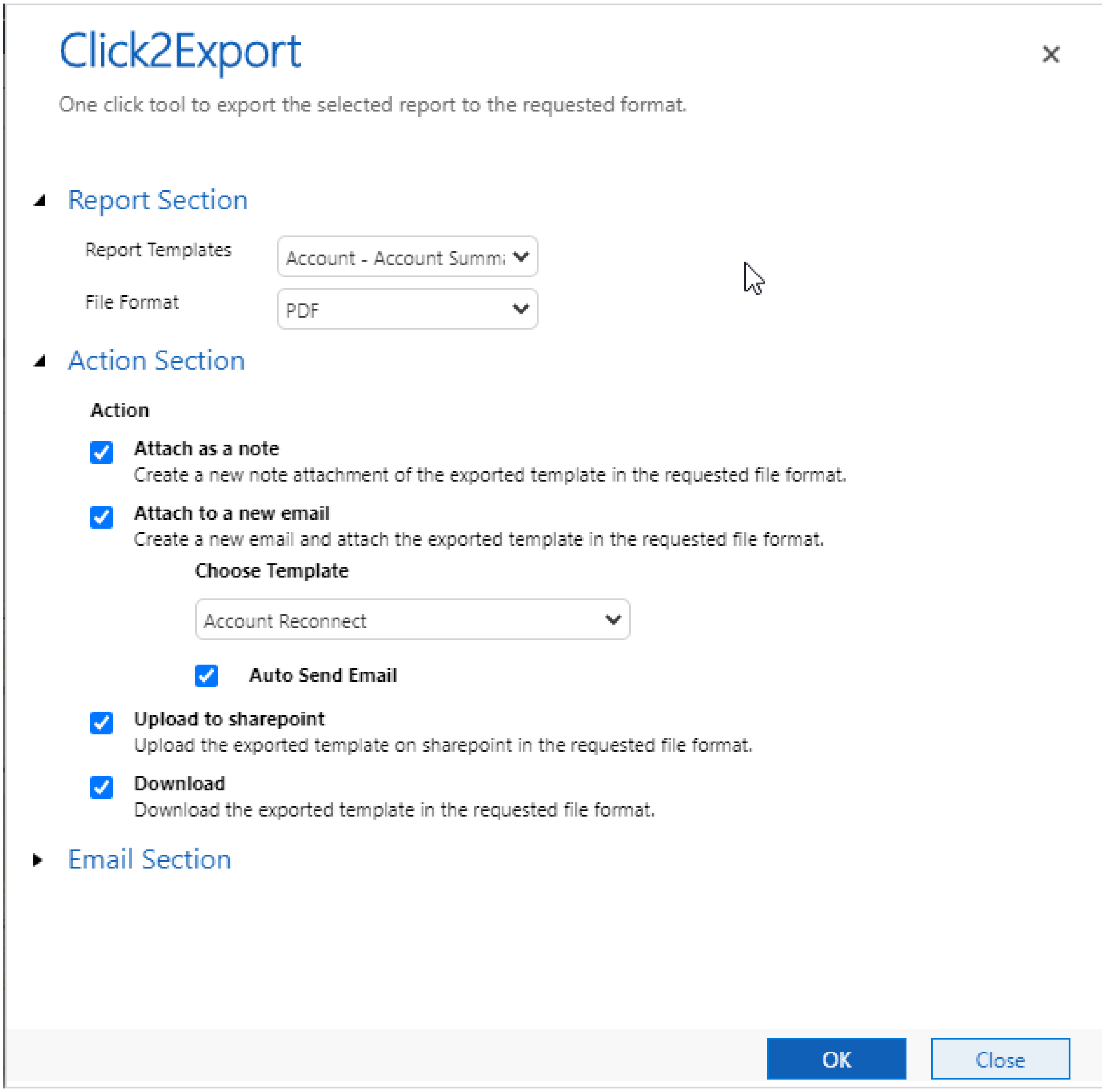
File Format – You can choose the type of file format the report should be exported to. The options currently supported are PDF, MS Excel, MS Word, TIFF, and CSV.

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:



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.

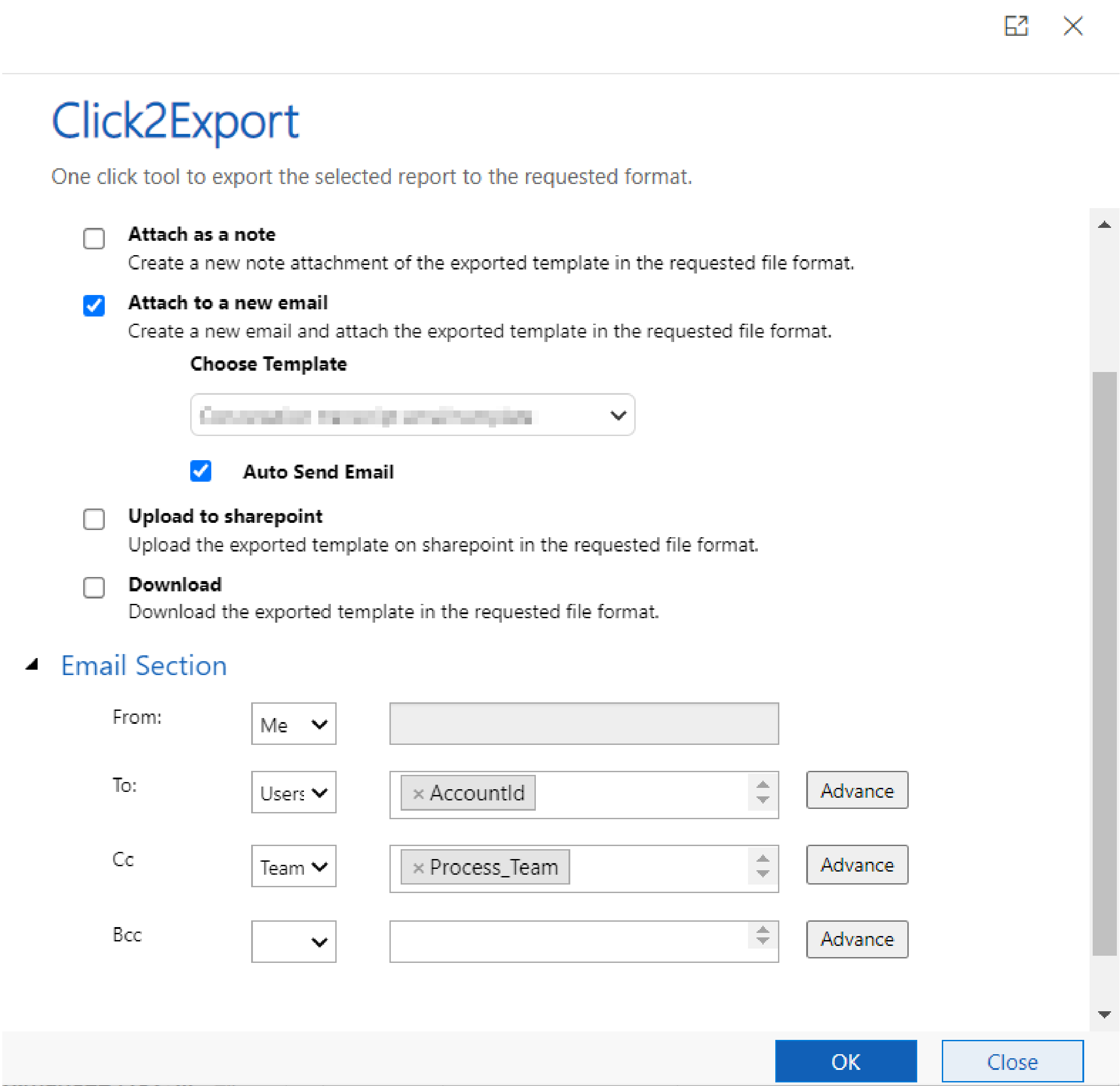
c. **Choose Template:** This will be populated based on what you have chosen at the time of creating CRM Report Template. You can change the template before exporting the file.

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:



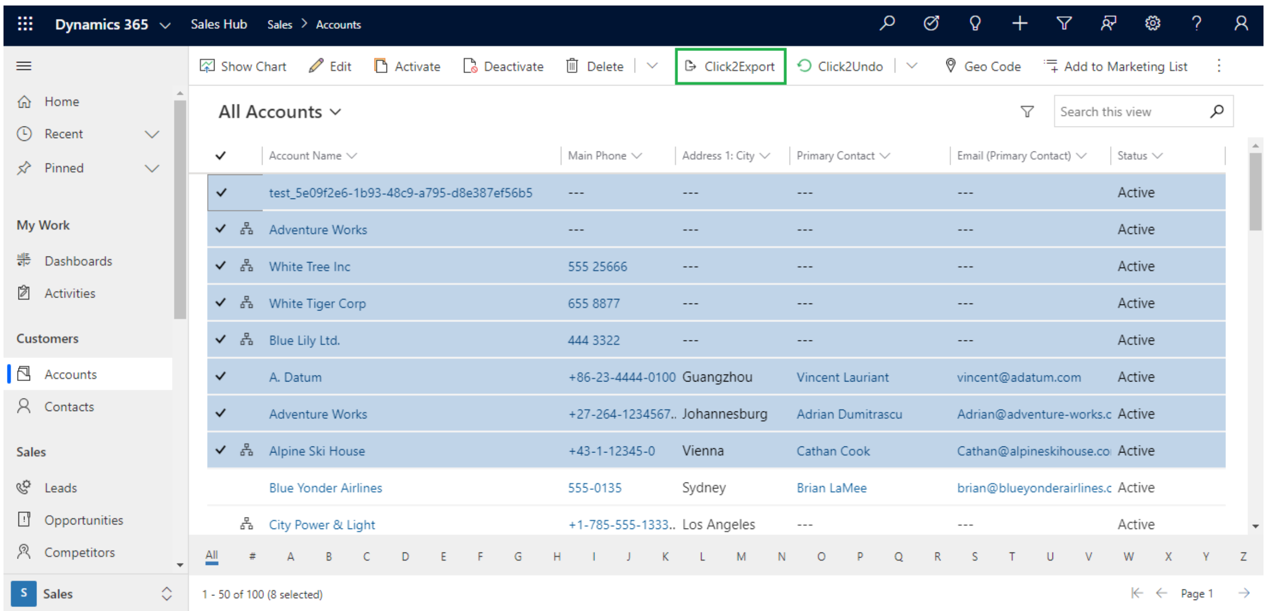
The values for **Email Section** are **prepopulated** based on what is selected at the time creating **CRM Report Templates.**
The users are also **allowed** to make changes before the file is exported.

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.

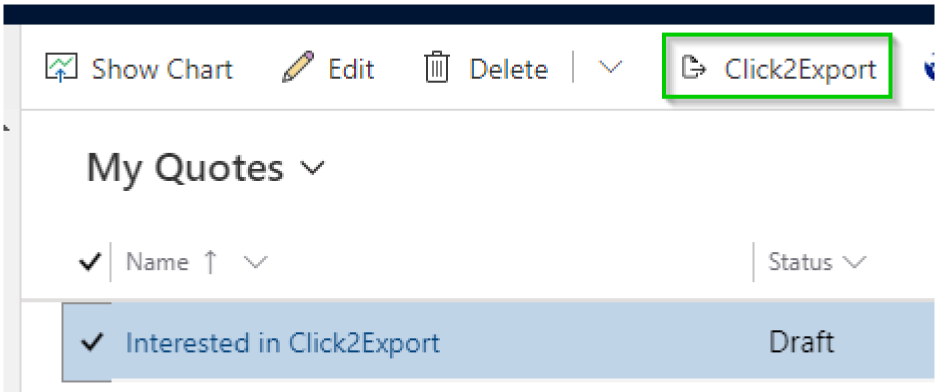
EXPORT SSRS REPORT

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.

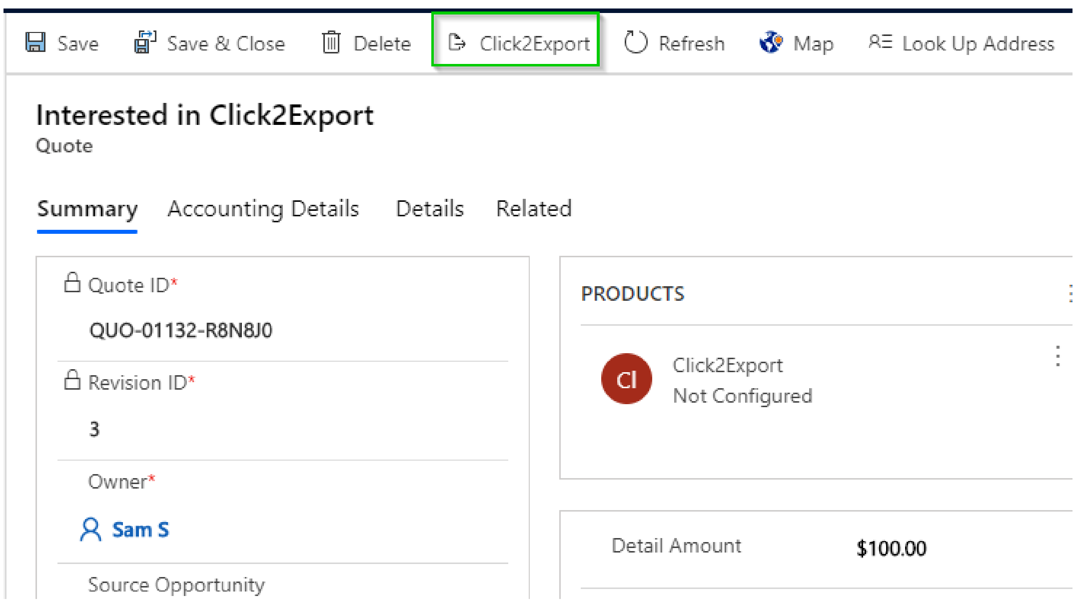
Given below are the steps that needs to be followed to export SSRS Report.

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

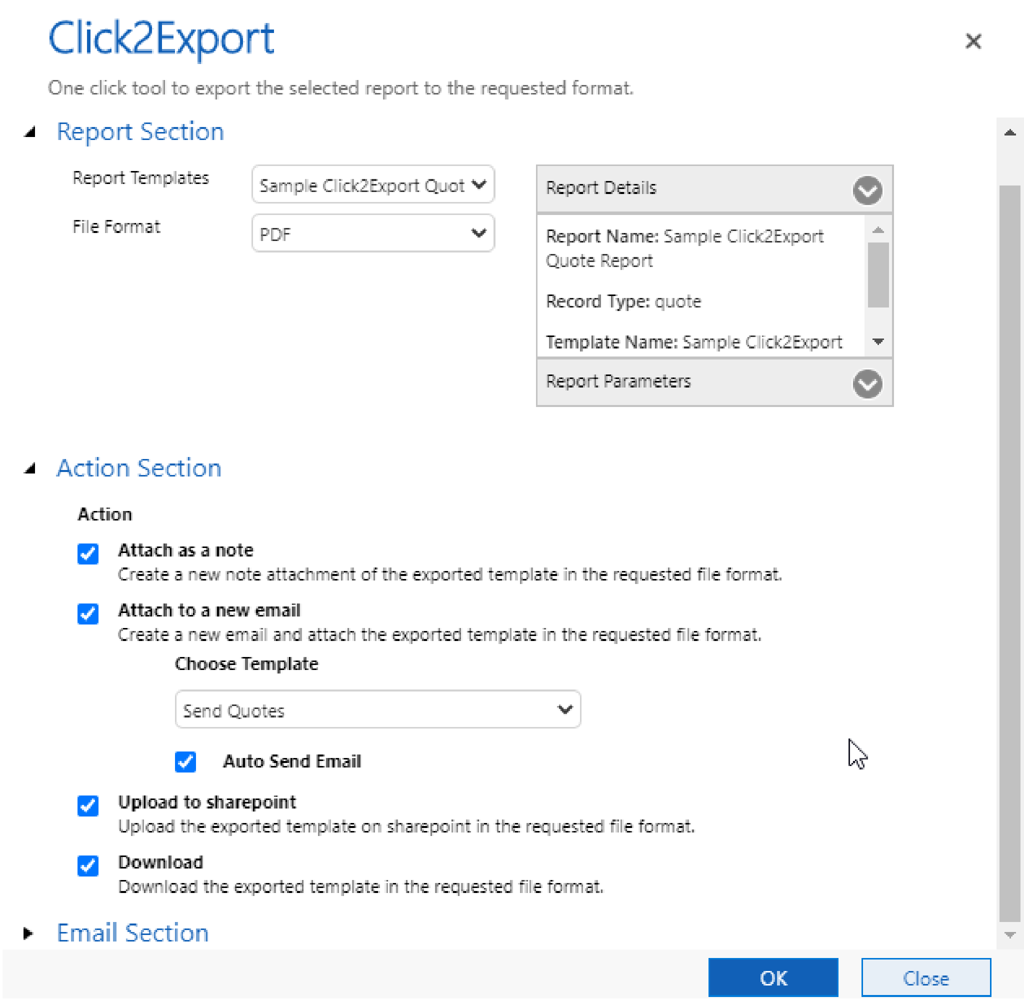


OR

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.

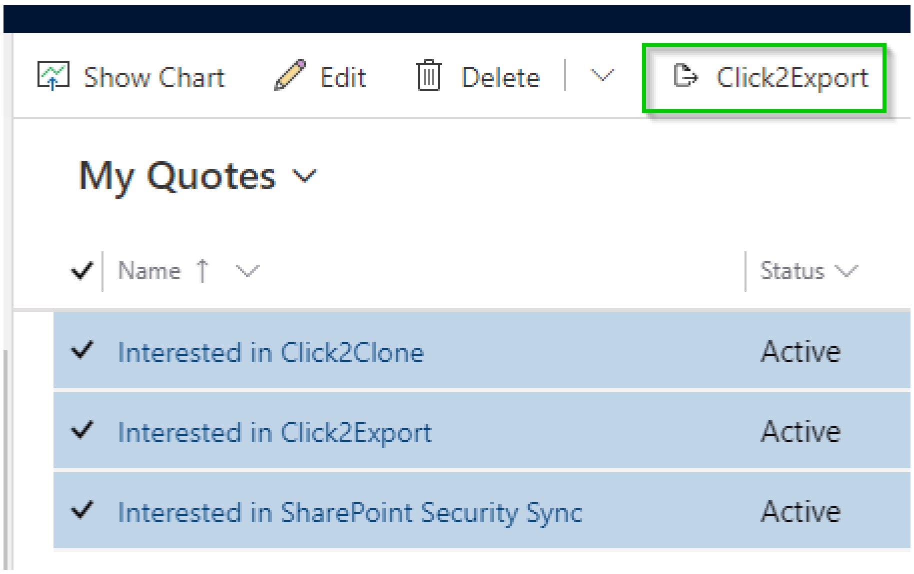
You can read more about Action and Email

BULK EXPORT SSRS REPORT

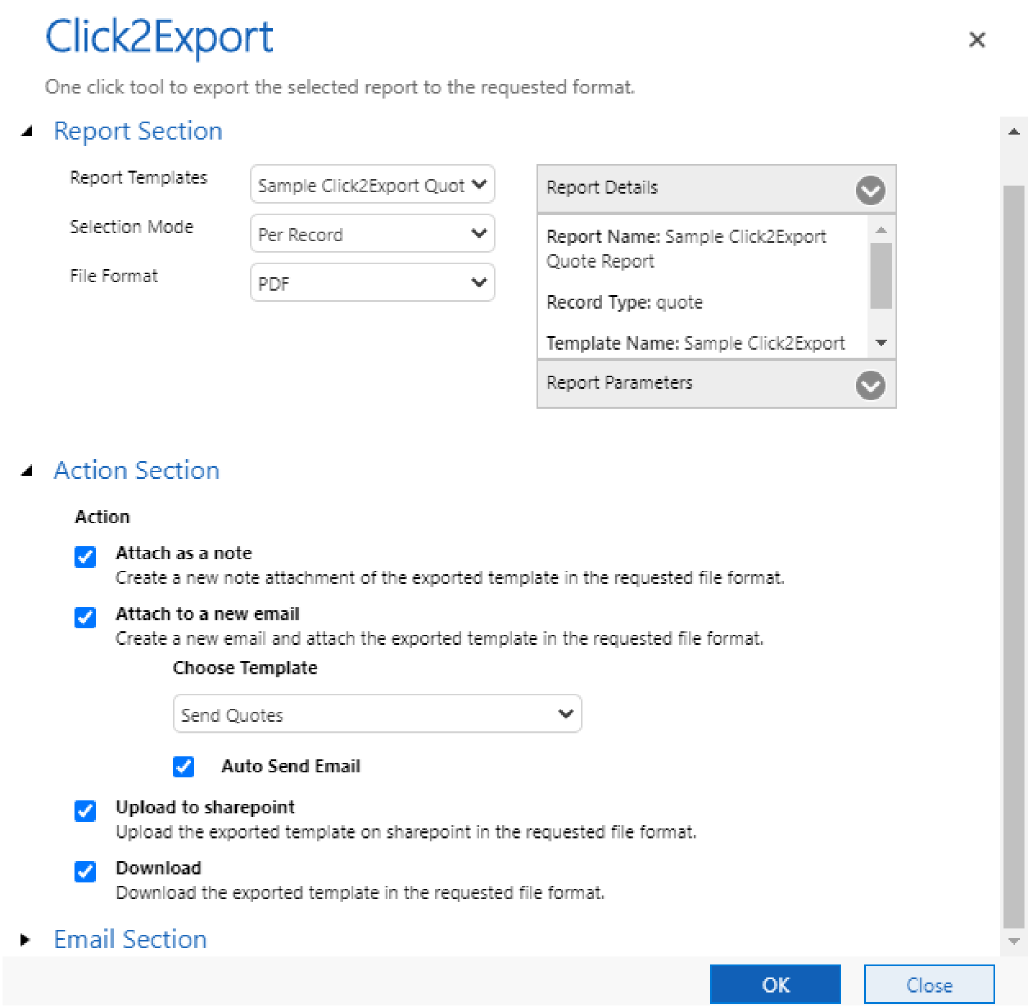
Using Click2Export, you can export SSRS Report for multiple records at one go. Let us see how this can be achieved.

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.



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.

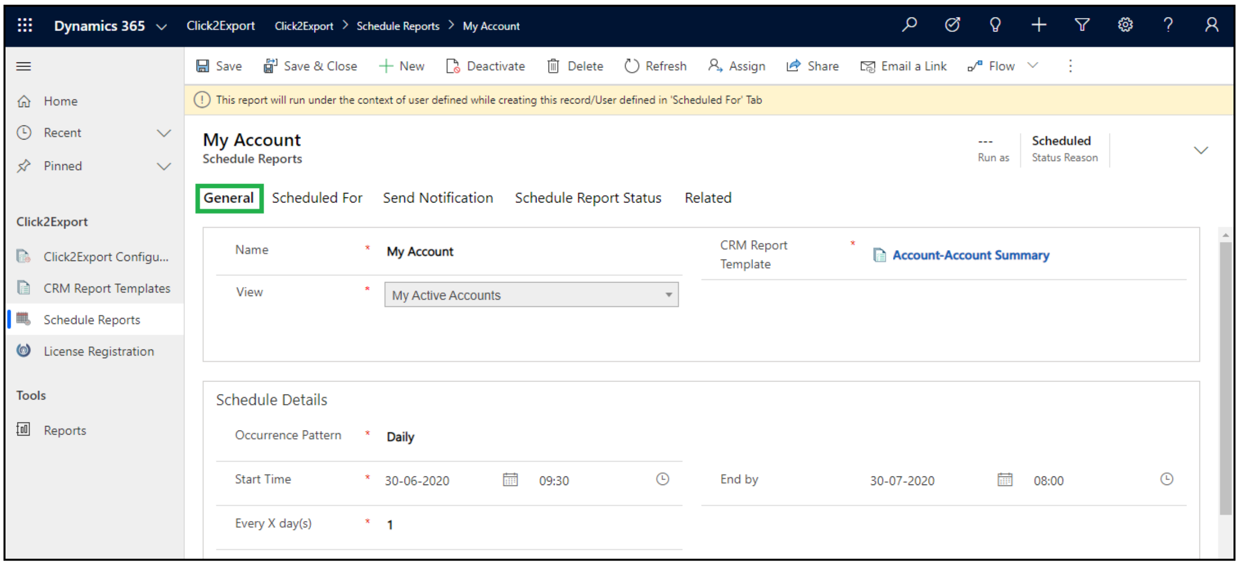
Report Parameters: If the SSRS report is a parameterized report, this section will list down all the parameters of the SSRS report and the user can select values before exporting the report.

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:



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.**

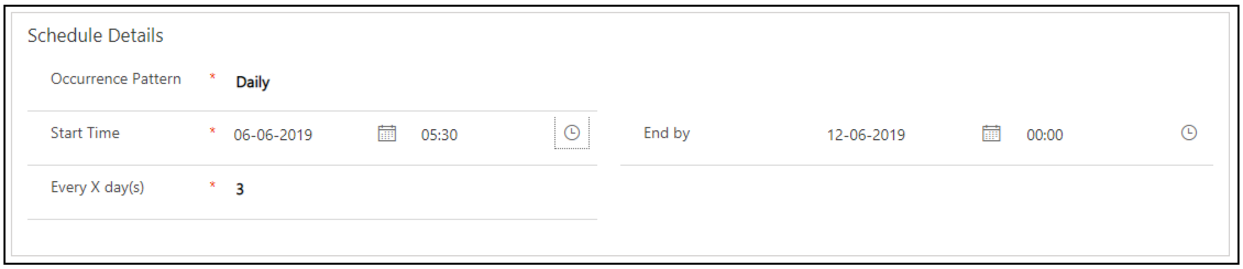
Start Time: Select the starting date and time to trigger the first export. Date and time should be current. Past date and time are not considered.

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

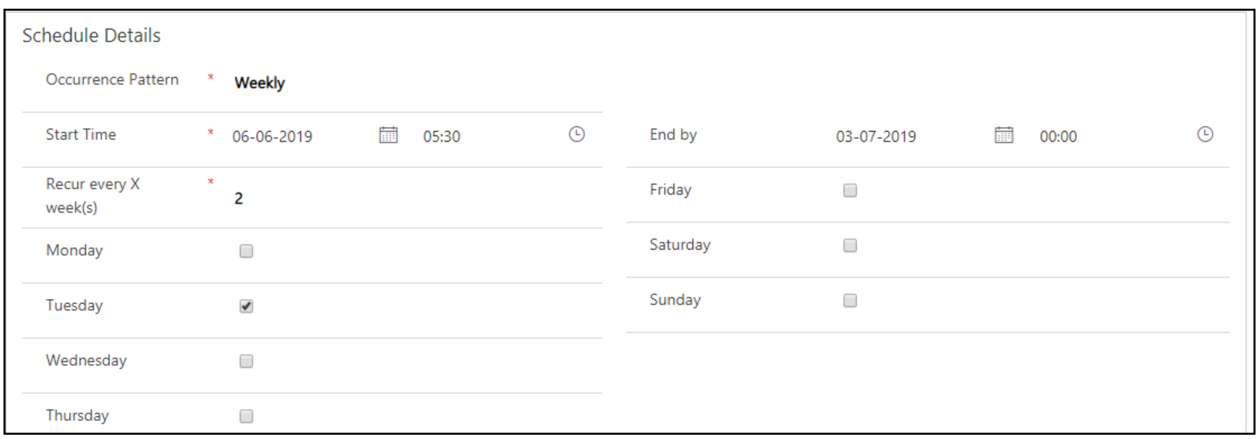
Interval:

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

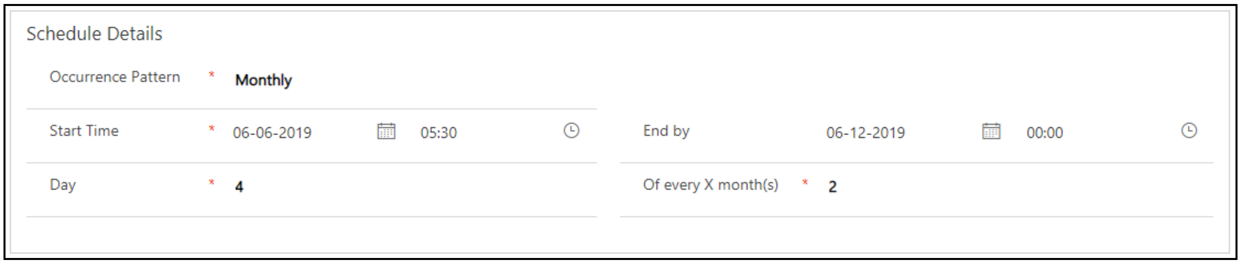
a) In the below screenshot, **Occurrence Pattern** is set as **Daily** and **Every X day(s)** is set as **3**. Here the first process will occur on 6th June 2019, at 5:30 and from there onwards every **3rd day** till the **End by** date & time.



b) In the below screenshot, **Occurrence Pattern** is set as **Weekly** and **Recurs 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.



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.

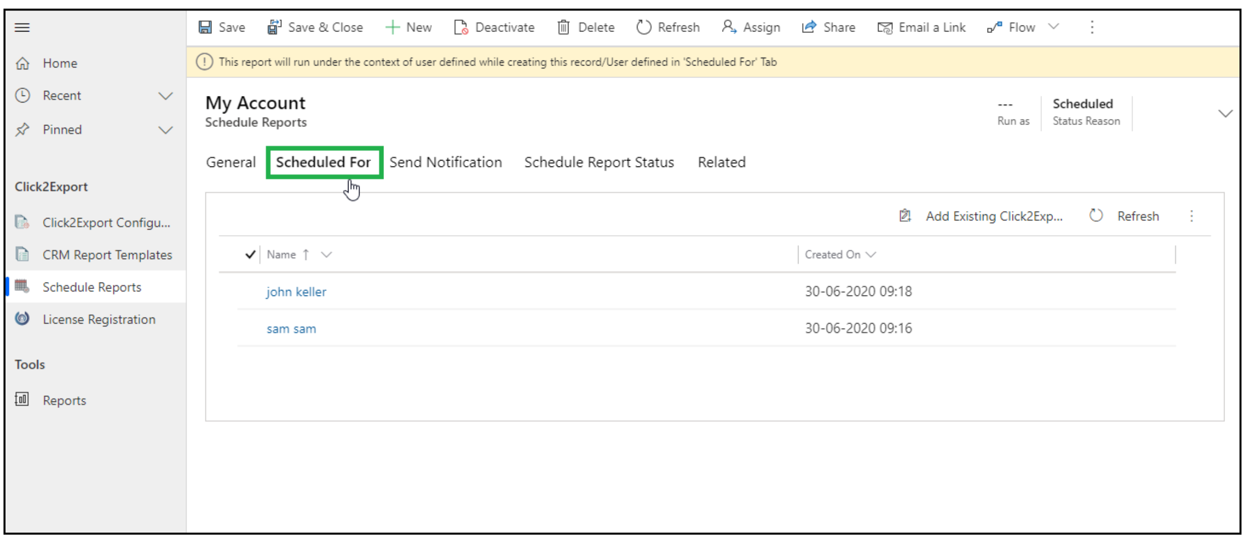


Fill the required fields and click on **Save**.

Note:

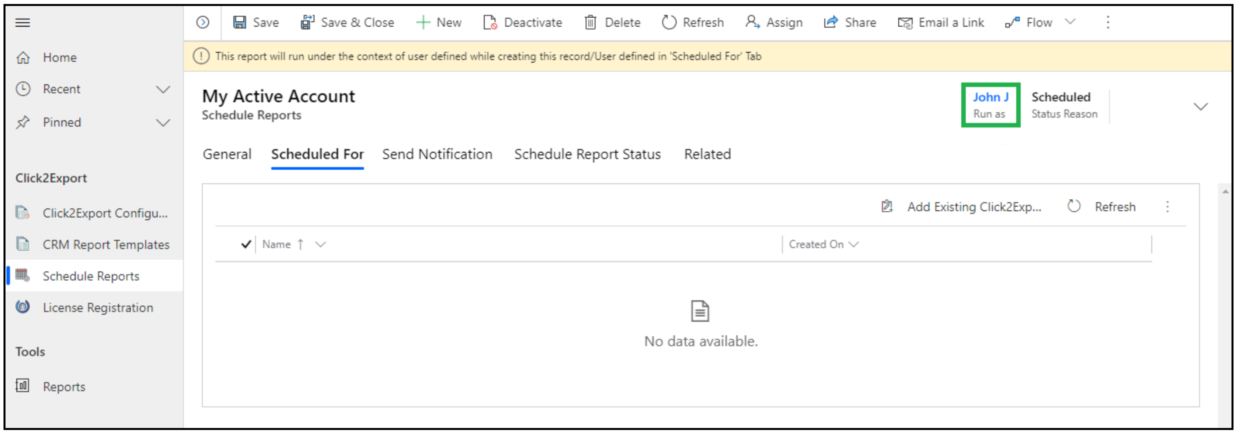
- **The user with Click2Export Administrator role can run same scheduling under multiple users at the same time.**
- **The user with Click2Export User role will not be able to see 'Scheduled For' tab and can only run this scheduling under themselves.**

Scheduled For:



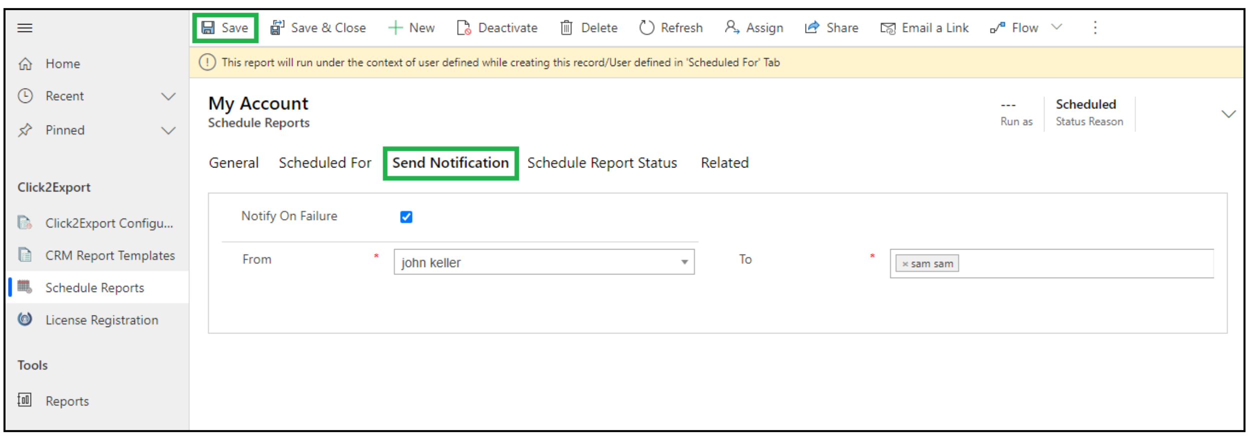
For this, you need to do **'Set Credentials'** on User form once to Generate Tokens. (Required for Reports/Word/Excel Template)

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



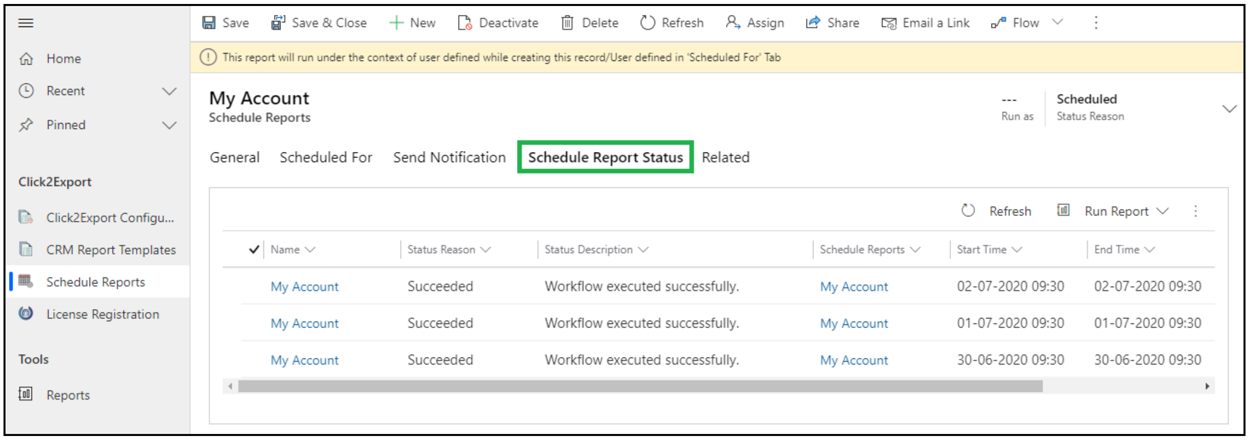
Send Notification:

- 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.

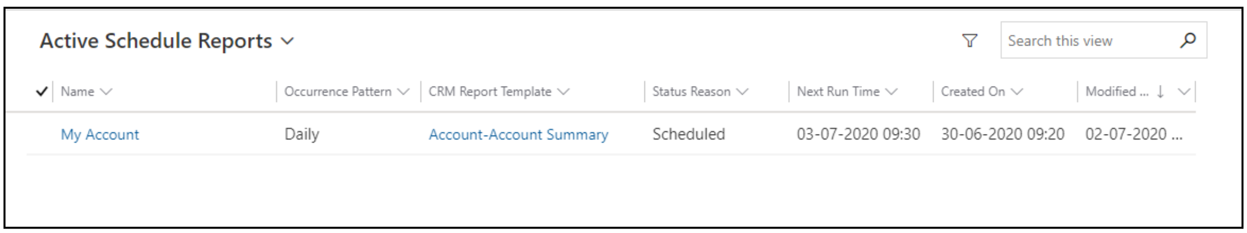


Scheduled Report Status:

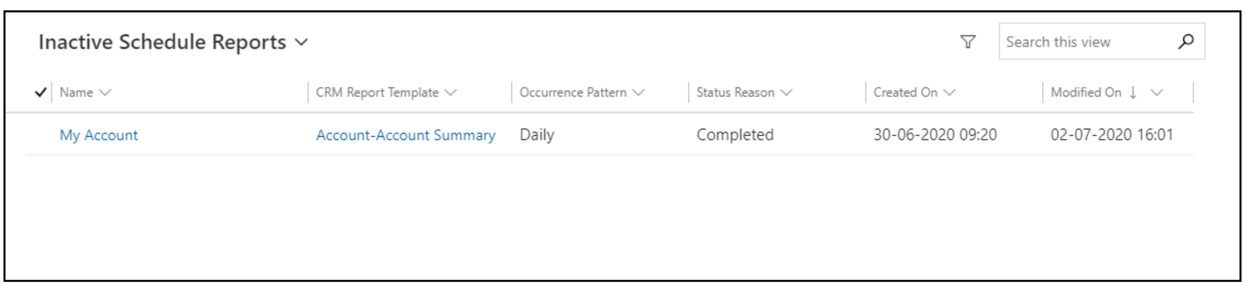
- Now to see the status of scheduling you can go to **'Schedule Report Status'** tab.



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



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



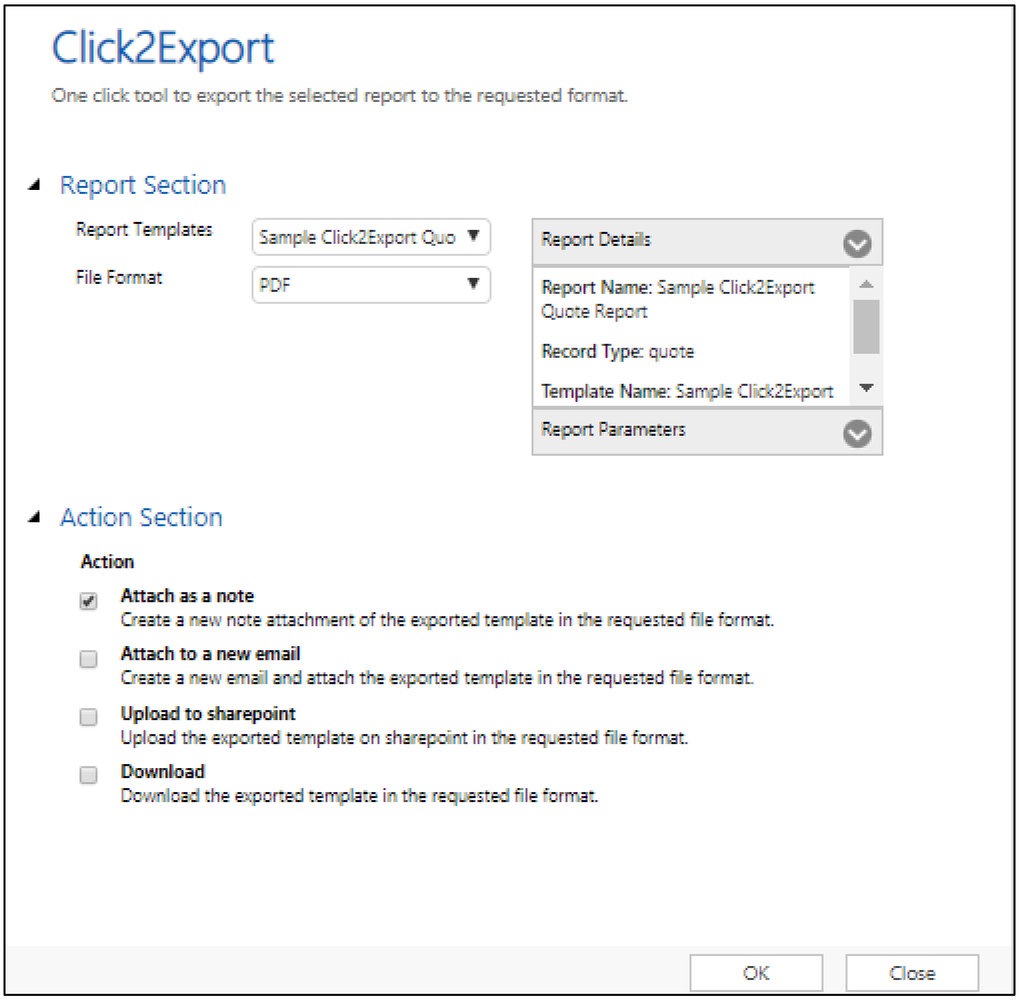
Note: If End by date is not defined, then the process will go on nonstop.

CLICK2EXPORT USE CASES

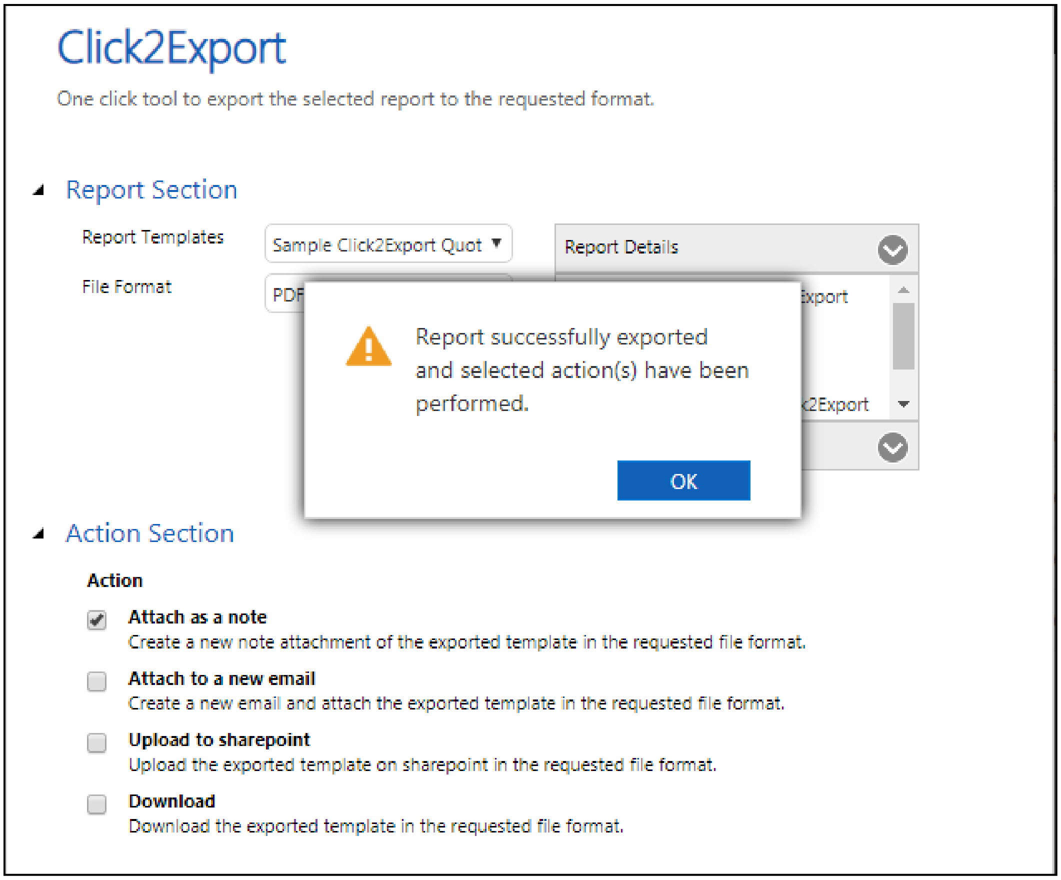
CLICK2EXPORT SELECTING A SINGLE RECORD OR FROM WITHIN A PARTICULAR RECORD:

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.



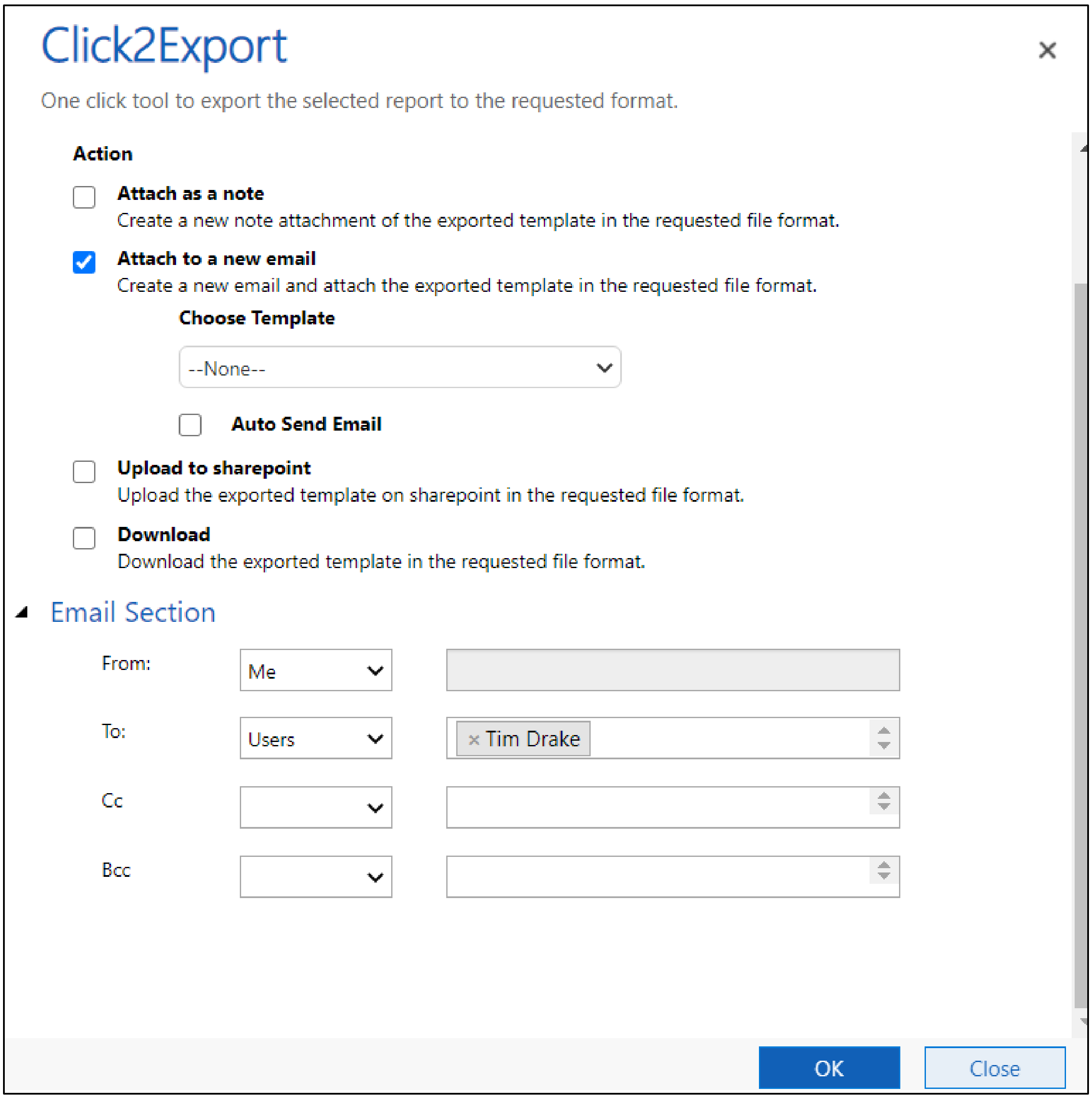
If you choose email attachment option then, it will ask for an email template to be used in order to compose the email in choose template.

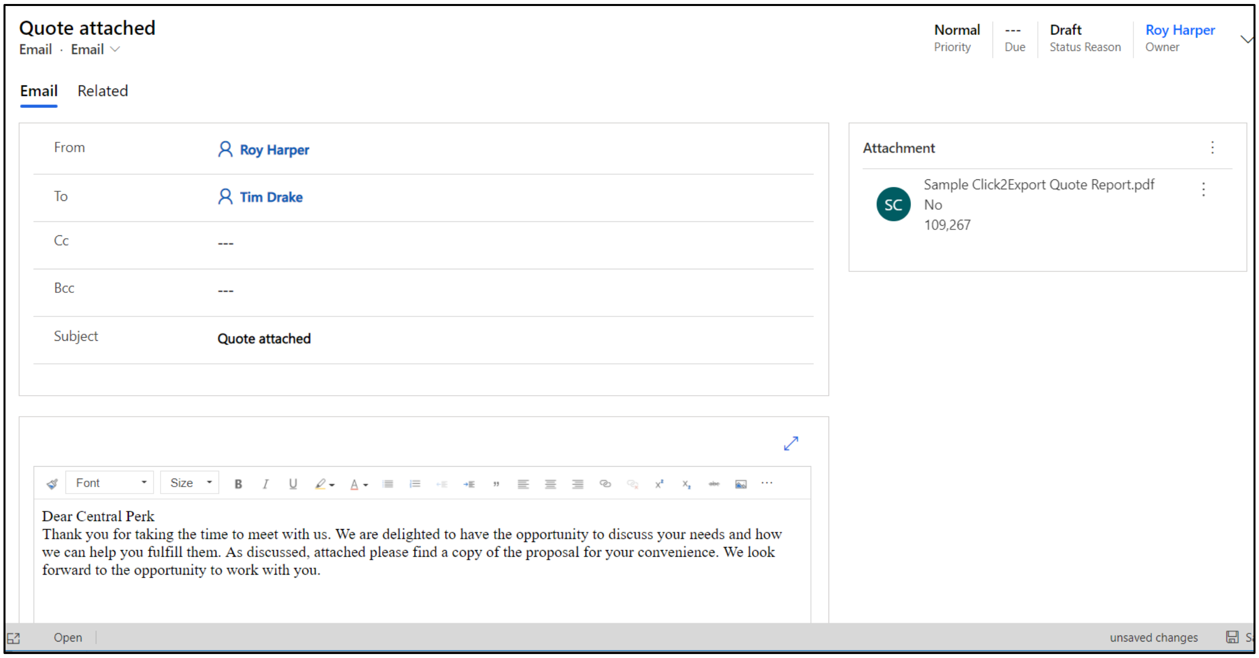
Also, Auto Send Email option will be available where user would be able to automatically send the email with the attachment of exported report file.

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.

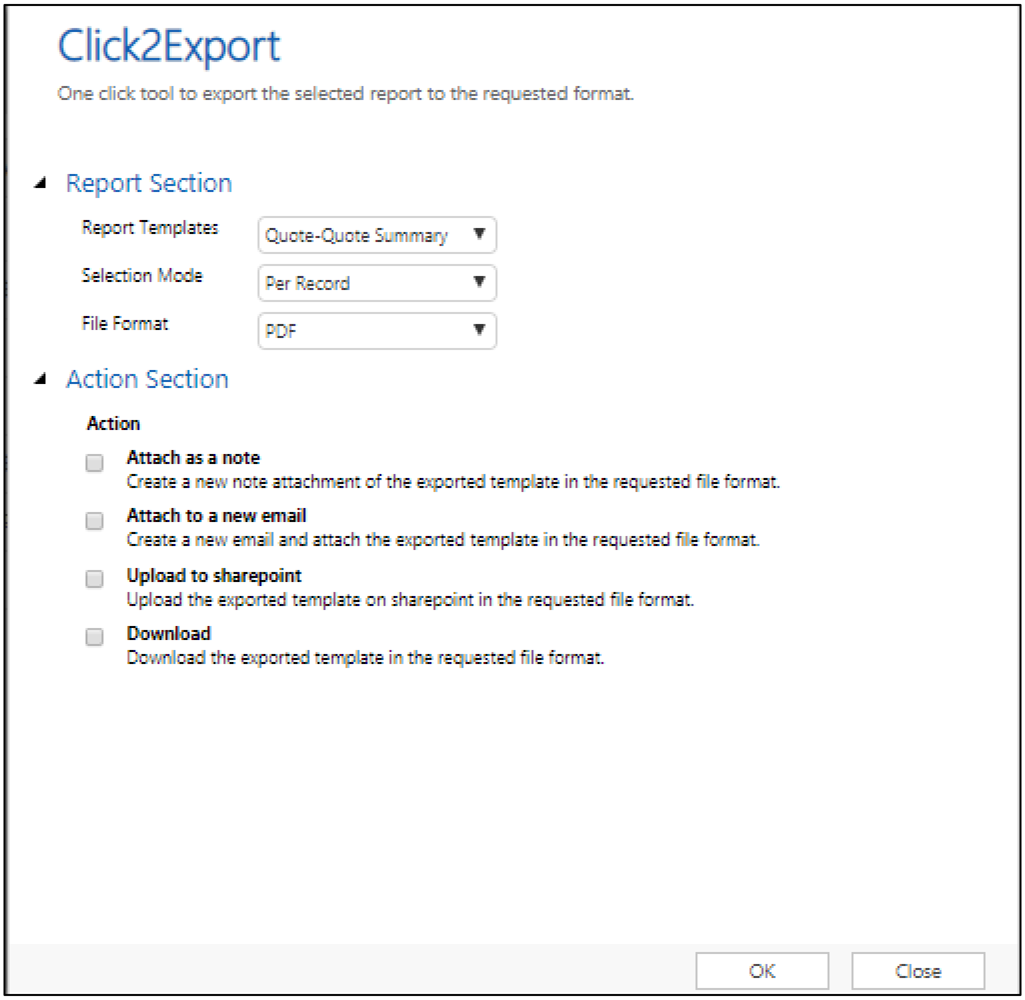
If the user set the Auto Send as yes then the email will be sent automatically with the attachment of exported file and the content of email would be as email template selected in the choose template dropdown.





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".

<u>For **"Per Record"** option one report is exported per selected record</u>.

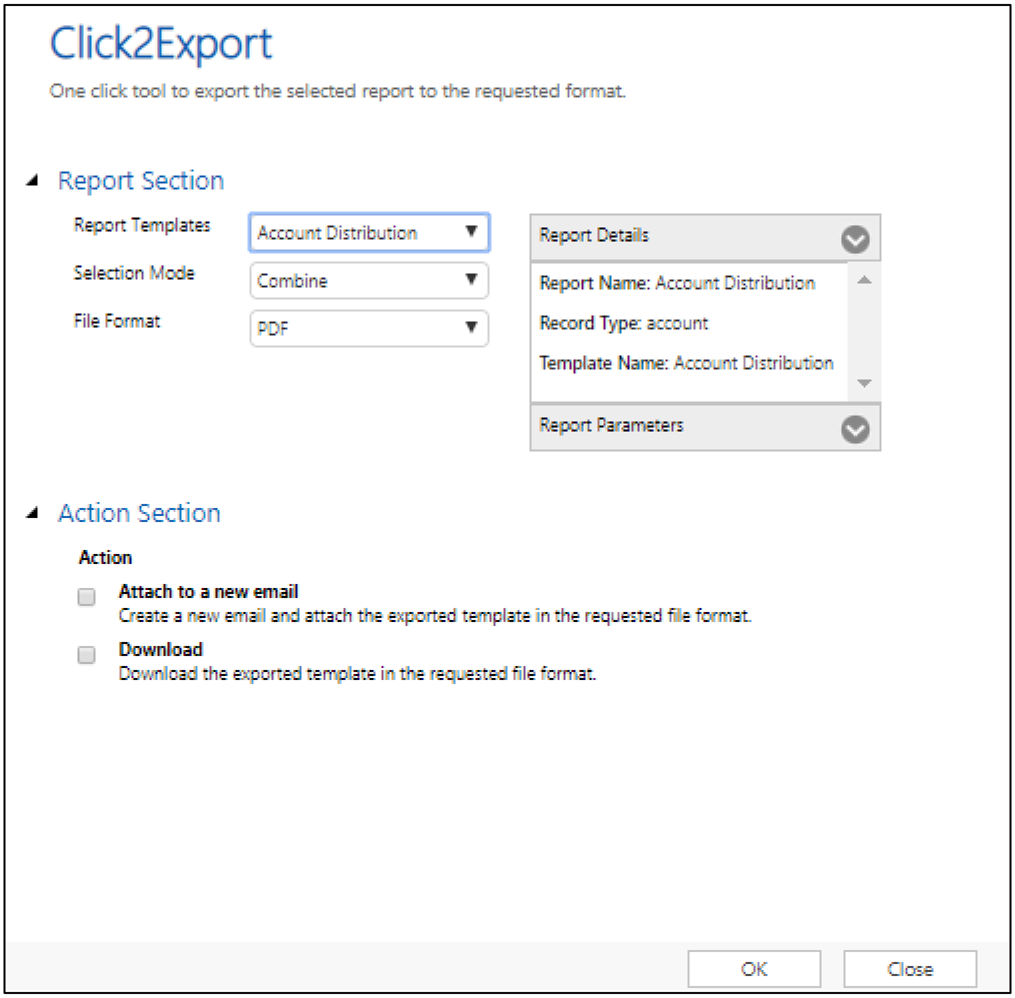
Attach as Note – The file attached against the primary record.

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.

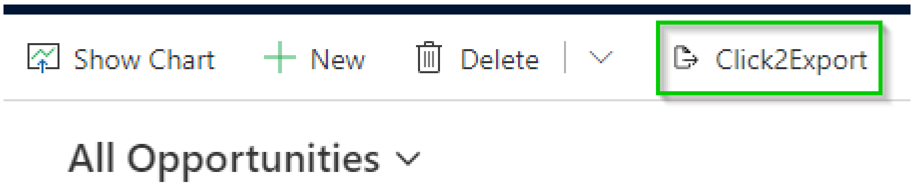
CLICK2EXPORT EXPORTING EXCEL TEMPLATE

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.

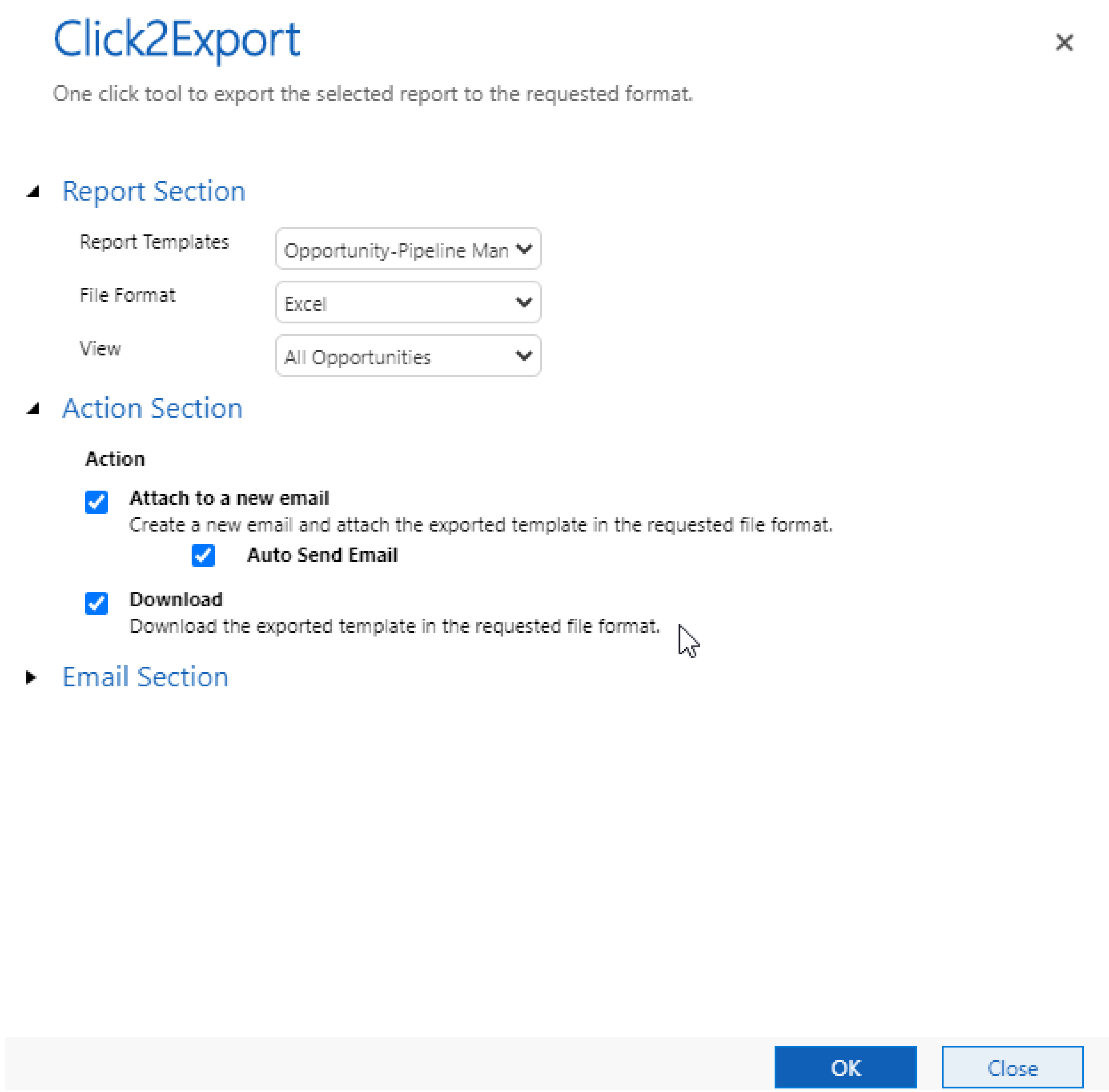


Note:

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.



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

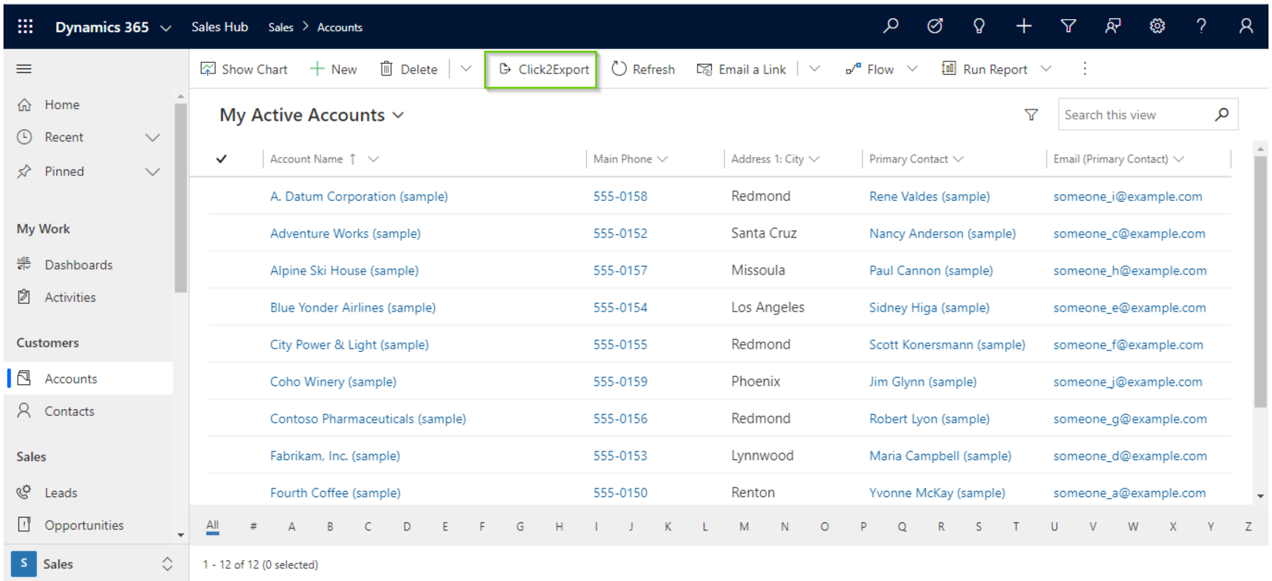
File Format: This is where you can select the format in which you would like to export your Excel Template. Currently, Excel Template can be exported in **Excel format**.

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

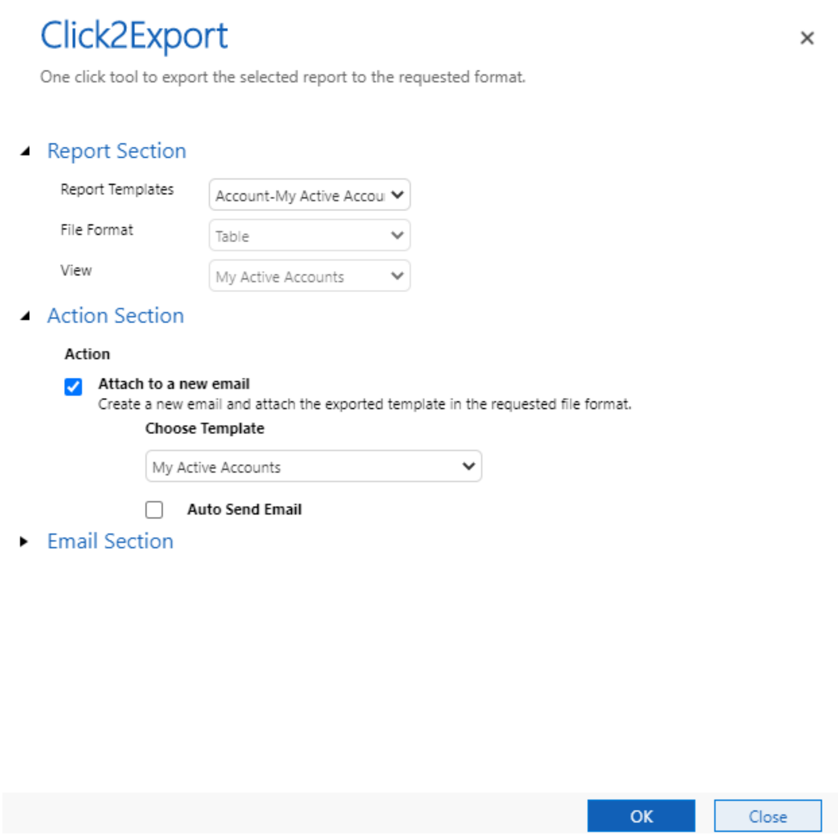
You can read more about **Action and Email** Section from here.

CLICK2EXPORT EXPORTING EMAIL TEMPLATE (CRM VIEWS DATA)

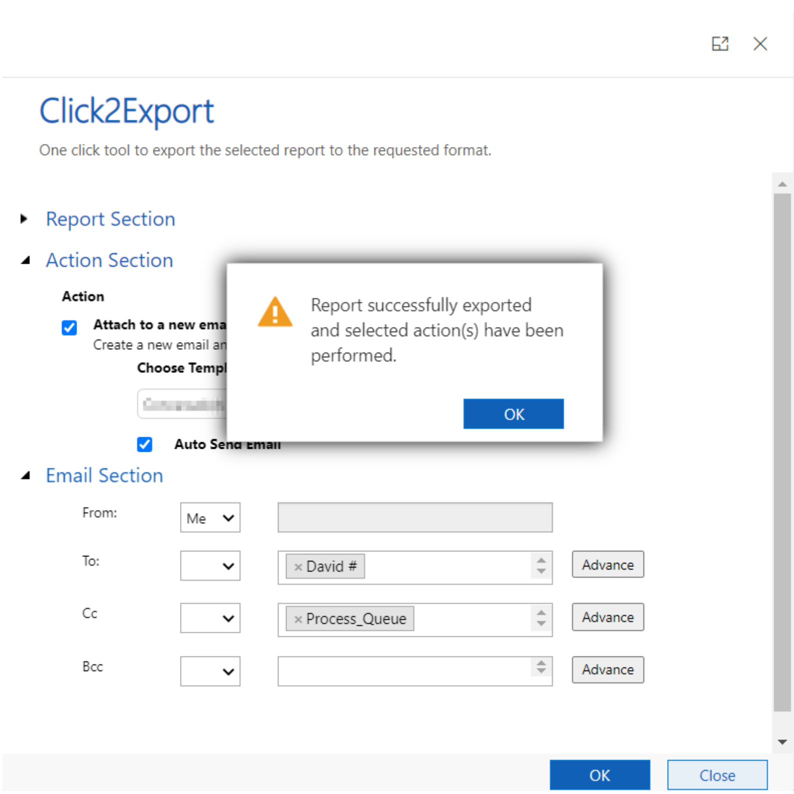
Email Templates can be exported for a View. Go to the entity for which you have configured Email Template and click on Click2Export button.



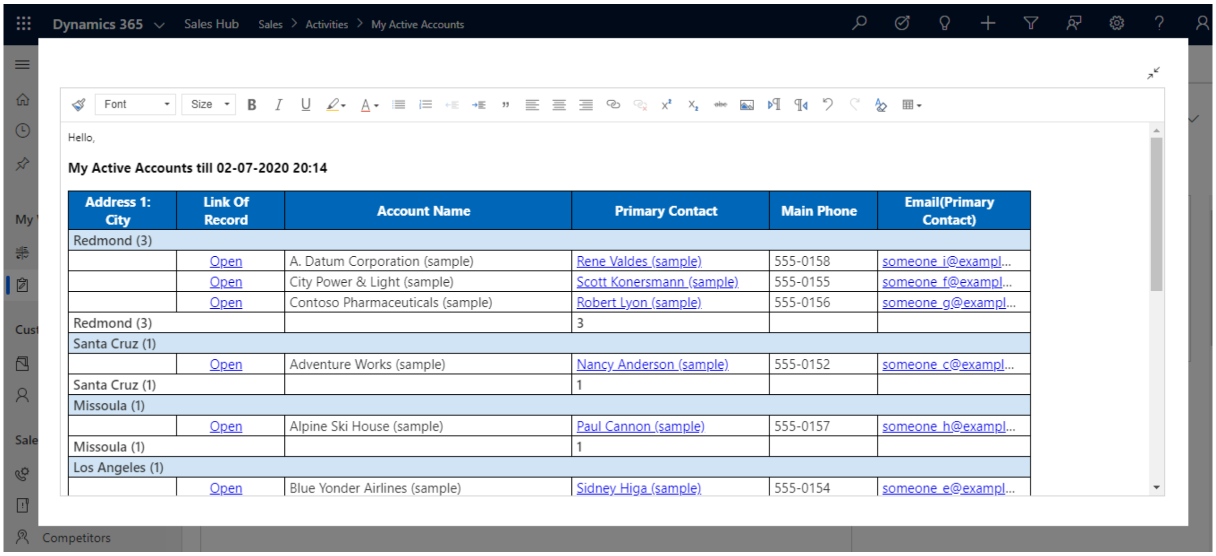
The options for entity will be listed specific to the Views for which Email Templates have been created. Select the configured View you want to export --> Click on OK.



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

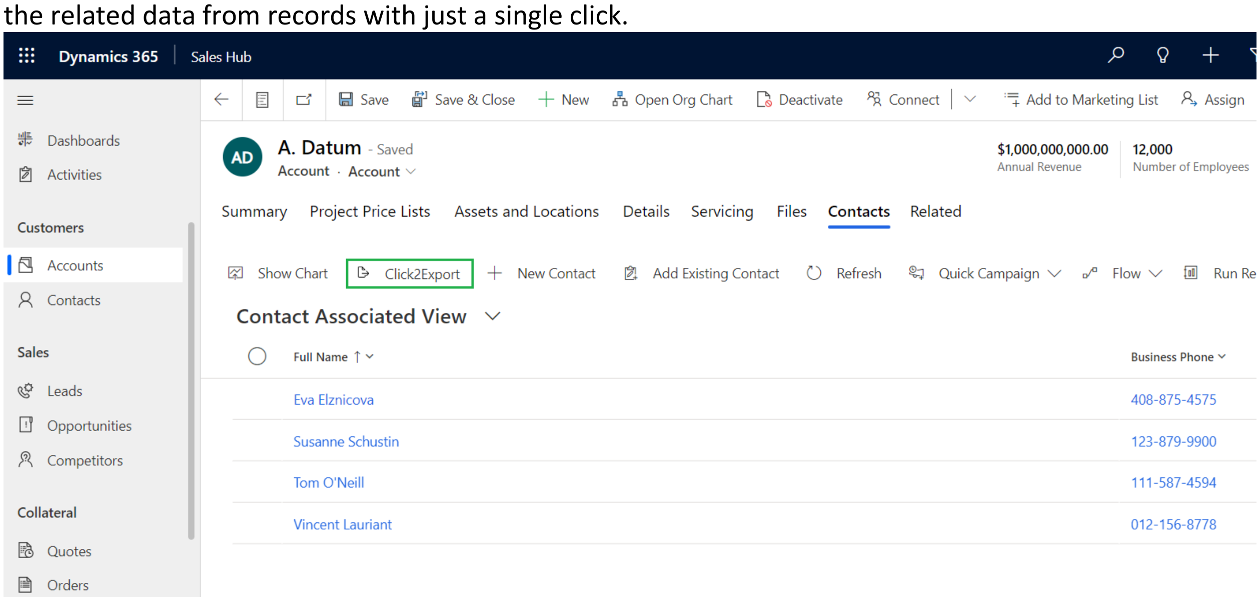


Here, you can see the email window with email drafted along with the View details in tabular form.



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.

CONTACT

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