



Click2Export

inogic

White Paper

CLICK2EXPORT

Aim:

Easily export any Dynamics 365 Report/Word/Excel/Email template (CRM Views Data) with single click and auto send Email with an attachment or embedded CRM views data in tabular format, attach as a note, upload to SharePoint or download it.

Features:

- ✓ One click export tool for Dynamics CRM Reports/Word/Excel/Email Template (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, Email Attachment, Auto send Email, attach as a note or upload on 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 both can be exported
- ✓ Available to export the report for a single record or multiple records with one click
- ✓ Email templates can be specified in Default Email templates for generating the email for the Email option
- ✓ Easily upload the exported report file on SharePoint
- ✓ Automate the process of exporting the Dynamics 365-word template/report template with required action to be performed for selected entity record using Click2Export workflow

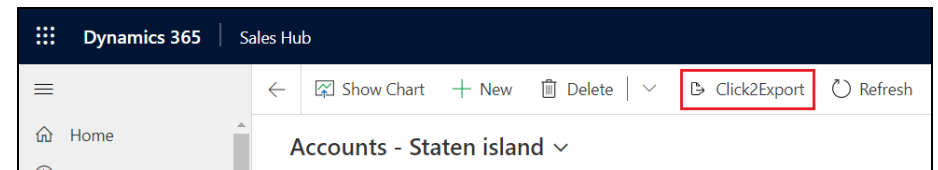
- ✓ Schedule and export SSRS/CRM Views/Word/Excel Template at regular intervals
- ✓ Ability to append Date-Time field's data in custom Date-Time formats to the file name while exporting the report

Supported Versions:

Versions - Dynamics 365 8.2 and above, Dataverse (Power Apps).
Deployment Models - On-Premises and Online
CRM Classic Web Client as well as UCI
Tablet Client

Ease of Access:

Click2Export button has been added to grid as well as form ribbon of all entities which are setup for export report functionality.



Configure Report Template

You need to setup report template for CRM reports/word/excel/email templates (CRM Views Data) that you need to use with Click2Export functionality. You can specify the default filters to be used by the report along with the default values for the parameters required by the report.

CLICK2EXPORT

[Report Template](#)

General | Email Configuration | CRM Report Parameters | Related

Template Type	* Report Template
Record Type	* Quote
Template Name	* Sample Click2Export Quote Report
Default File Format	* PDF
Export File Name	* Sample Click2Export Quote Report - {customerid} - {today}
DateTime Field Format	dddd, dd MMMM yyyy

[Excel Template](#)

General | Email Configuration | Related

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)
DateTime Field Format	dddd, dd MMMM yyyy HH:mm:ss

[Word 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}
DateTime Field Format	dddd, dd MMMM yyyy

[Email Template \(CRM Views Data\)](#)

Account-All Accounts
CRM Report Template

General | Email Configuration | Related

Template Type	Email Template
Record Type	* Account
View *	All Accounts
Template Name	* Account-All Accounts

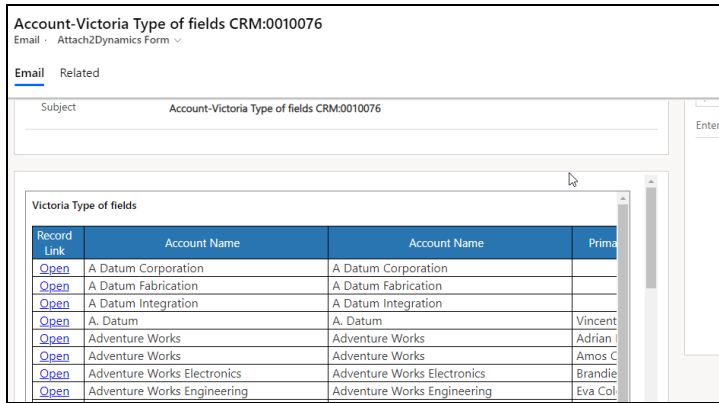
Auto Send Email

Default Email Template ---

Report Layout All Accounts

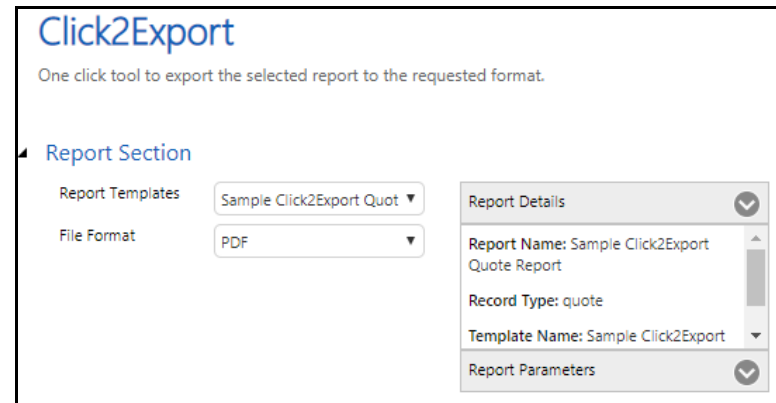
CLICK2EXPORT

Exported CRM view in Email Template:



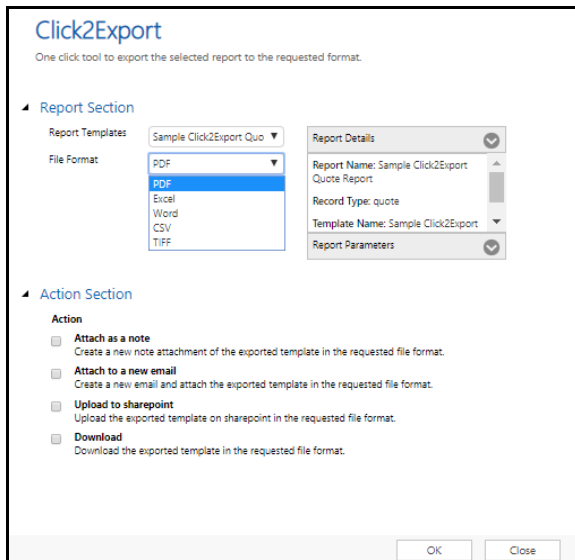
Change Default Values at run time

Before exporting report, you have the ability to change the values. This helps to run and export the report to be emailed, note attach, upload to SharePoint or download with desired parameters from the user interface.

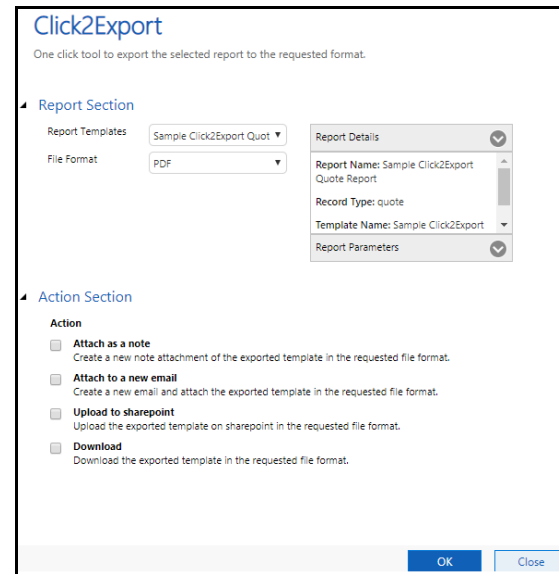


Click2Export User Interface

Ability to export to **5 file formats** i.e., PDF, Word, Excel, CSV and TIFF for **Report** template, **2 file formats** i.e., PDF and MS Word for **Word** Template and Excel format for **Excel** template.



Actions supported

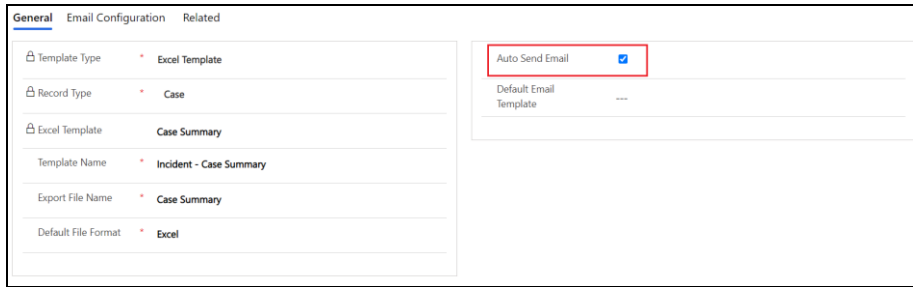


CLICK2EXPORT

Set file name convention of exported file

You can specify the naming convention of the file that would be exported to include entity field values like name of the record or any other field of that record.

Configure defaults for auto-sending emails



General | Email Configuration | Related

Template Type: Excel Template

Record Type: Case

Excel Template: Case Summary

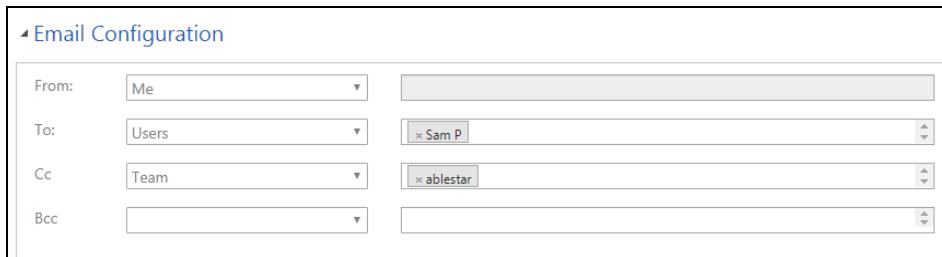
Template Name: Incident - Case Summary

Export File Name: Case Summary

Default File Format: Excel

Auto Send Email:

Default Email Template: ---



Email Configuration

From: Me

To: Users

Cc: Team

Bcc:

Sam P

ablestar

Attach Exported file as a Note to the record

The exported file in selected format will be attached to a note in the selected record itself with the help of the note option.



Note modified by Roy Harper

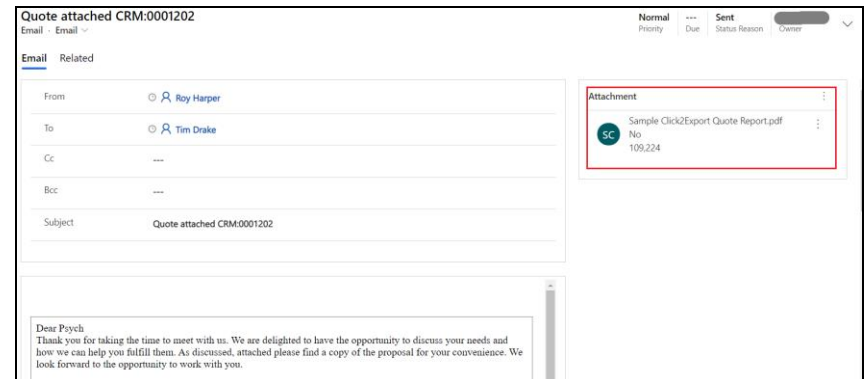
Sample Click2Export Quote Report

Sample_Click2Export Quote Report.pdf

4:22 PM

Email Exported file

This option will allow you to provide the email template to be used in choose template option for composing the email. The email is generated with the exported file attached and will be saved as draft email in CRM. Also, Auto Send Email option is available where user would be able to automatically send the email with the attachment of exported file. Email Section is available to select the sender, receiver, CC and BCC.



Quote attached CRM:0001202

Normal Priority Due Status Reason Owner

Email - Email

From: Roy Harper

To: Tim Drake

Cc: ---

Bcc: ---

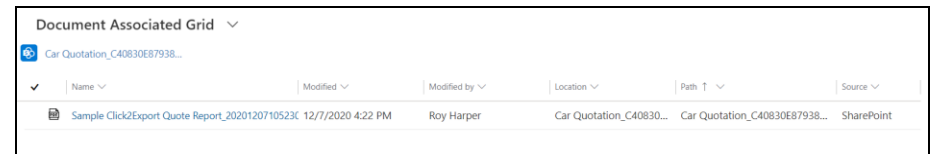
Subject: Quote attached CRM:0001202

Attachment: Sample Click2Export Quote Report.pdf No 109,224

Done Psych
Thank you for taking the time to meet with us. We are delighted to have the opportunity to discuss your needs and how we can help you fulfill them. As discussed, attached please find a copy of the proposal for your convenience. We look forward to the opportunity to work with you.

Upload to SharePoint

This action will upload the exported template on configured SharePoint site in the requested file format.



Name	Modified	Modified by	Location	Path	Source
Sample Click2Export Quote Report_2020120710523C	12/7/2020 4:22 PM	Roy Harper	Car Quotation_C40830...	Car Quotation_C40830E87938...	SharePoint

Download Report

This action will download the exported report in the requested file format.

CLICK2EXPORT

Create Workflow

Click2Export supports exporting Dynamics 365 CRM Reports/Word Templates with the workflow. This helps the user to automate the process of exporting Reports/Word Templates rather than clicking on Click2Export button every time.

General Administration Notes

Hide Process Properties

Process Name* Click2Export Quote Template Workflow

Entity Quote

Activate As Process

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

Scope Organization

Start when:

- Record is created
- Record status changes
- Record is assigned
- Record fields change **Select**
- Record is deleted

Workflow gets triggered based on the options:

1. On Demand
2. On the change of various automatic processes e.g., Record status changes.

The user can select the required action i.e Attach as a Notes, Attach as an Email or Upload to SharePoint to run the of workflow after exporting the Dynamics CRM Reports/Word Templates.

Word Template

Process: Click2Export Quote Template Workflow

Working on solution: Default Solution

Set Custom Step Input Properties

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

Form Assistant

Dynamic Values

Operator: Set to

Look for: Quote

Add

Report Template

Process: Click2Export Quote Report Workflow

Working on solution: Default Solution

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Click2Export Report Template	Lookup	Required	Quote
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 type="radio"/> True
Upload to SharePoint	Two Options	Optional	<input type="radio"/> False <input type="radio"/> True

Form Assistant

Dynamic Values

Operator: Set to

Look for: Quote

Add

Schedule Reports

Set schedule to export and auto send Reports/CRM Views/Word/Excel/Email Templates (CRM Views Data) at regular intervals.

New Schedule Reports

Run as: Draft Roy Harper

General Send Notification Schedule Report Status

Name CRM Report Template

Schedule Details

Occurrence Pattern ---

Start Time --- End by ---

Interval ---

Contact Us:

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