White Paper

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:

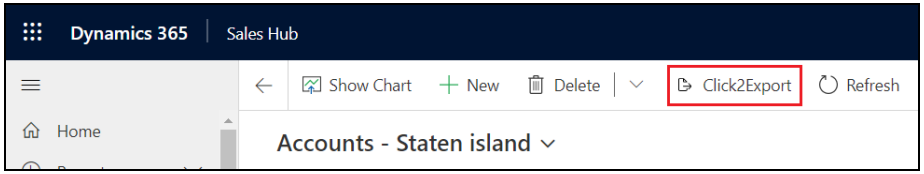
- ✓ One click export tool for Dynamics CRM Reports/Word/Excel/Email Template (CRM Views Data)
- ✓ Multiple file formats supported – PDF, MS Word, MS Excel, CSV & TIFF format
- ✓ Support for Fetch based reports
- ✓ Multiple export options supported – Download File, Email Attachment, Auto send Email, attach 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.

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

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

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

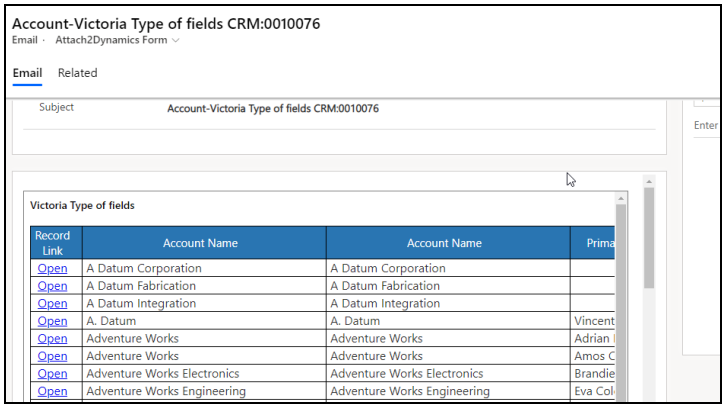
Email Template (CRM Views Data)

Account-All Accounts
CRM Report Template

General | Email Configuration | Related

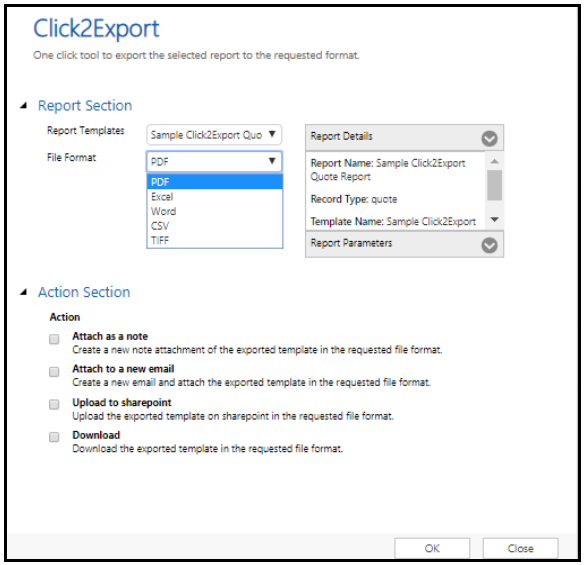
Template Type		Email Template
Record Type	*	Account
View	*	All Accounts
Template Name	*	Account-All Accounts
Auto Send Email		
Default Email Template		---
Report Layout		All Accounts

Exported CRM view in Email Template:



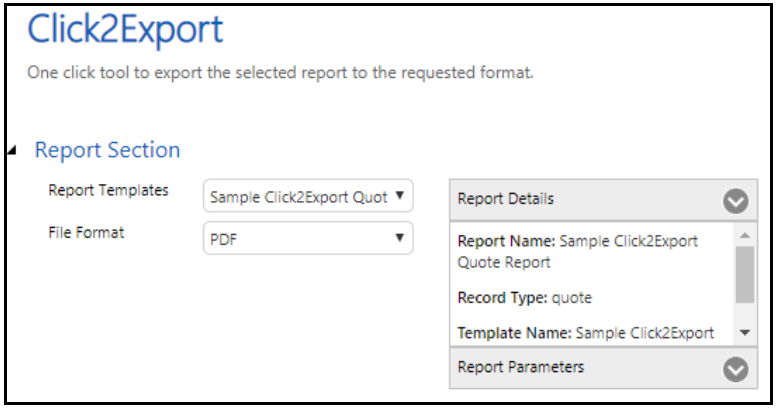
Click2Export User Interface

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.

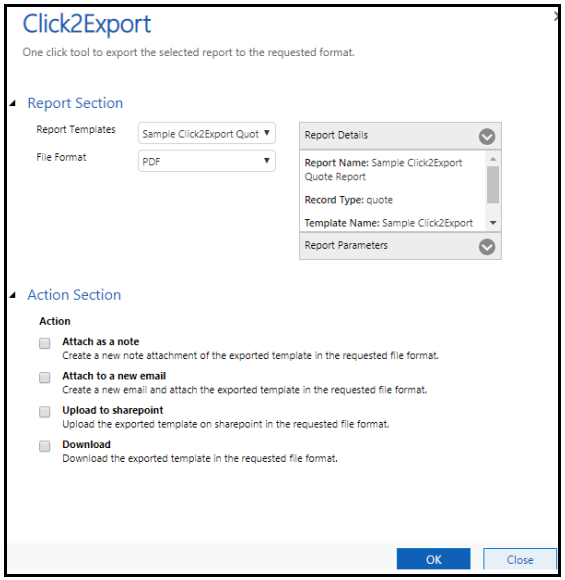


Change Default Values at run time

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.



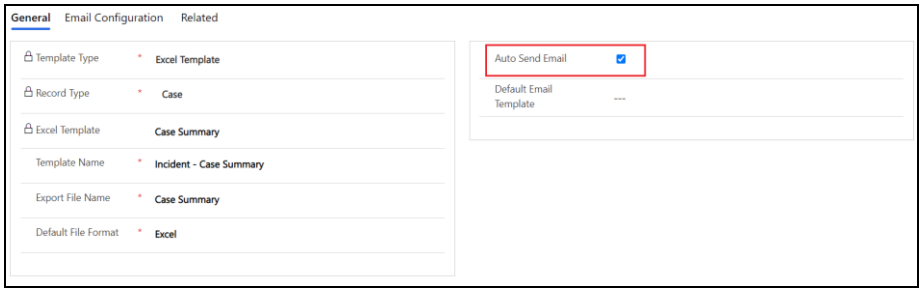
Actions supported

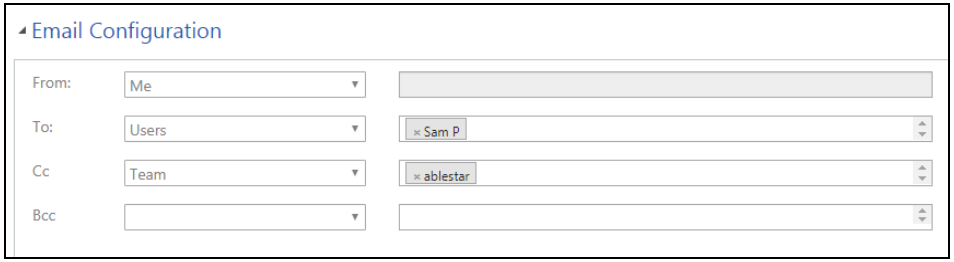


Set file name convention of exported file

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.

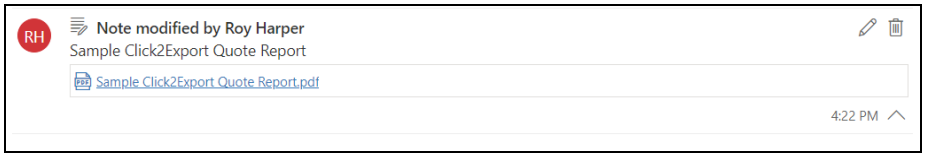
Configure defaults for auto-sending emails





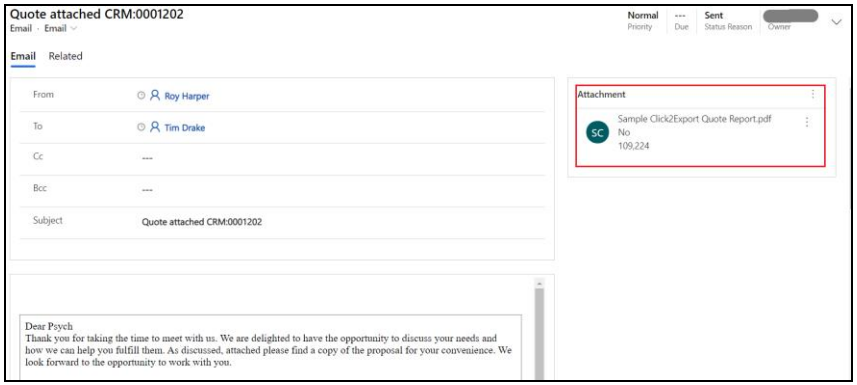
Attach Exported file as a Note to the record

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



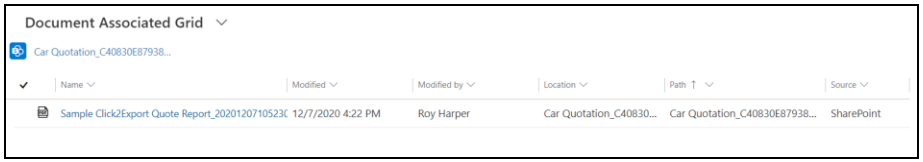
Email Exported file

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.



Upload to SharePoint

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

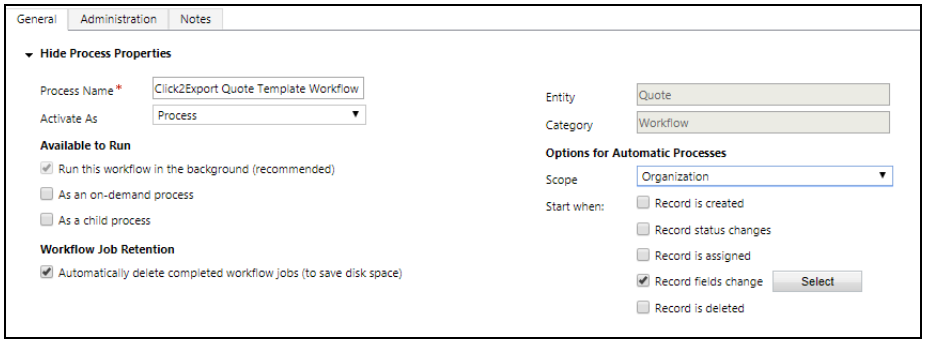


Download Report

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

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.

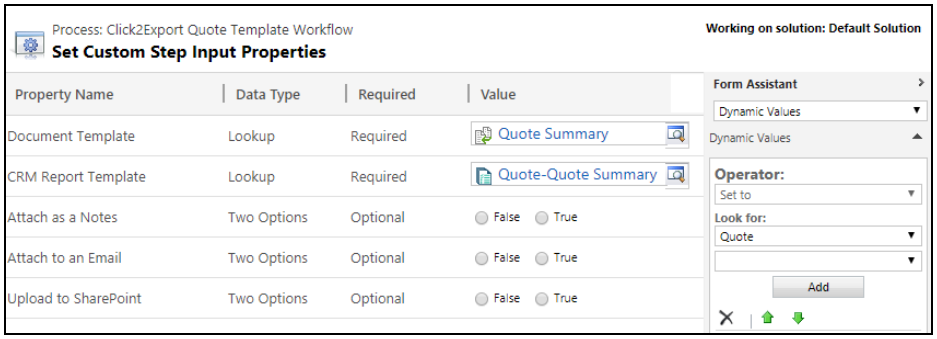


Workflow gets triggered based on the options:

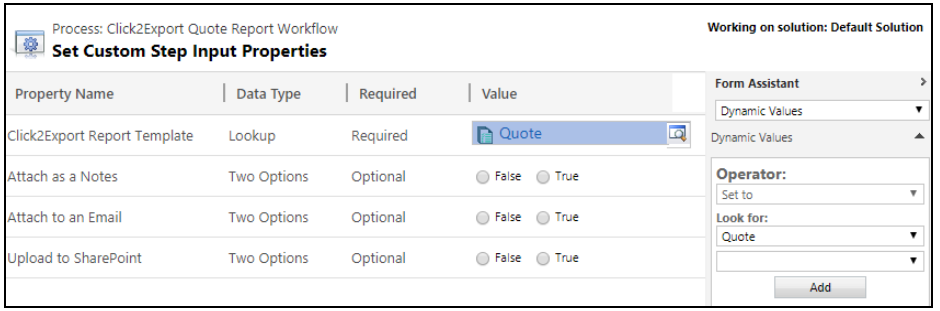
1. On Demand
2. On the change of various automatic processes e.g., Record status changes.

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



Report Template



Schedule Reports

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

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