

CLICK2EXPORT



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Aim:

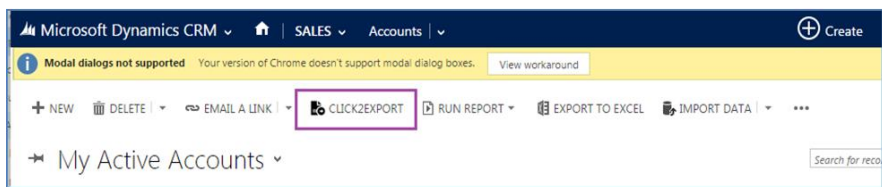
Easily export any report in the system with single click and attach it to an email or note or just download it

Features:

- ✓ One click export tool for Dynamics CRM Reports
- ✓ Multiple file formats supported – PDF, MS Word & MS Excel
- ✓ Multiple export options supported – Download File, Email or Attach as a note
- ✓ 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
- ✓ Email templates can be specified for generating the email for the Email option.

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



Supported Versions:

Versions - Dynamics CRM 2011, 2013 & 2015
Deployment Models - On-Premise, Online and Partner Hosted
CRM Web Client, Offline Outlook Client
CRM Web Client on Tablet

Click2Export User Interface

This is the central UI where users can select the report, change parameters, file type and choose desired action

A screenshot of the 'Click2Export' dialog box. The title bar says 'Click2Export' with a close button. Below the title, it says 'Export report to selected Format.' The dialog has several sections:

- Report Templates:** A dropdown menu showing 'Account Overview'.
- Selection Mode:** A dropdown menu showing 'Per Record'.
- File Format:** A dropdown menu showing 'PDF'.
- Report Details:** A panel with a dropdown arrow and a scrollable list containing:
 - Report Name: Account Overview
 - Record Type: account
 - Template Name: Account Overview
- Report Parameters:** A panel with a dropdown arrow.
- Action:** A section with four radio button options:
 - As Note**
Export report and attach as note to record
 - Add As Email Attachment**
Create email and attach exported report in selected format
 - Both**
Attach the exported report as note as well as email the same
 - Download File**
Download report to selected exported format

At the bottom right, there are 'Ok' and 'Cancel' buttons.

CLICK2EXPORT

Change Default Parameters run time

Before exporting report, you have the ability to change parameter values

This helps to run and export the report to be emailed with desired parameters from single user interface

Click2Export
Export report to selected Format.

Report Templates: Neglected Accounts

Selection Mode: Per Record

File Format: PDF

Report Details

Report Parameters

Minimum Days Neglected*: 14

Group By*: Days Without Activity

Fields marked * are compulsory Save

Set file name convention of exported report file

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

ACCOUNT
A. Datum Corporation (sample) Annual Revenue: \$10,000.00

Summary

ACCOUNT INFORMATION

Account Name*: A. Datum Corporation (sample)

Phone: 555-0158

Fax: --

Website: http://www.adatum.com/

Parent Account: --

NOTES

Enter a note

A.Datum Corporation (sample) - Account Distribution - 61424ed7-64af-e411-80e1-c4346badf060.pdf

Email Exported Report

This option will allow you to provide the email template to be used for composing the email. The email generated with the exported file attached will be saved as draft email in CRM

Action

- As Note**
Export report and attach as note to record
 - Add As Email Attachment**
Create email and attach exported report in selected format
- Choose Template**
- Account Reconnect
- Both**
Attach the exported report as note as well as email the same
 - Download File**
Download report to selected exported format

SEND SAVE ATTACH FILE INSERT TEMPLATE INSERT ARTICLE CONVERT TO DELETE

EMAIL

We haven't heard from you...

Priority: Normal Due: -- Status Reason: Draft Owner: devendra salve

From: Paul Cannon (sample)

To: --

Cc: --

Bcc: --

Subject: We haven't heard from you...

Regarding: Alpine Ski House (sample)

Attachment: SalesHistory.pdf

Dear Paul Cannon (sample),

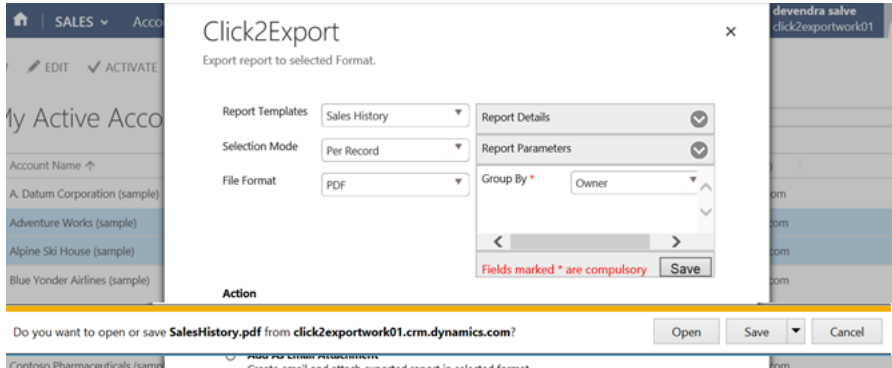
We have not heard from you for a while. We wanted to check in and make sure that you are still having a great experience using our product(s). We have asked devendra salve to contact you next week to get your feedback on the product(s) you are currently using and to give you details about our upcoming products.

Thank you.

CLICK2EXPORT

Download Report

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



Contact Us:

INOGIC (MUMBAI - INDIA)

M/S. INOGIC TECH (INDIA) PVT. LTD.
A/301, Everest Nivara InfoTech Park,
TTC Industrial Area, MIDC, Turbhe
Navi Mumbai, Maharashtra 400705
INDIA

E-mail: crm@inogic.com
Live Chat/ Skype: crm@inogic.com
Twitter: [@inogic](https://twitter.com/inogic)

Configure Report Template

You need to setup report template for every CRM report that you need to use with the 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.

CRM REPORT TEMPLATE : INFORMATION

Account Summary

General

Template Name *	Account Summary	Report Name	Account Summary
Export File Name *	Account Summary	Viewable By	Organization
Record Type	account	Owner *	devendra.salve
Custom Report	<input type="checkbox"/>		
Default Filter	<pre><fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false"> <entity name="account"> <all-attributes /> <filter type="and"> </filter> </entity> </fetch></pre>		