User Guide

Report to PDF

Document Version: 2.0

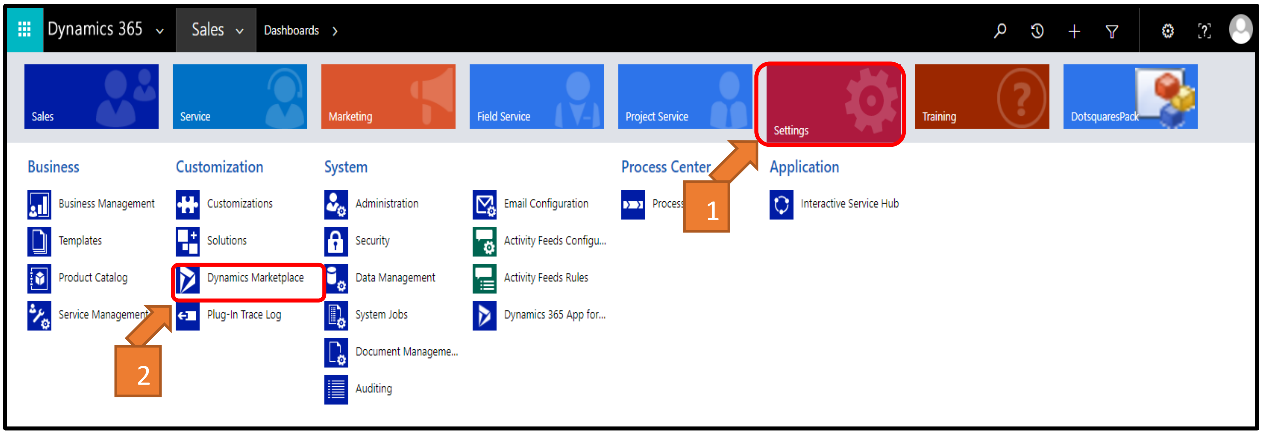
Solution Version: 365.072017.3.4

Table of Contents

How to install Report to PDF Solution?

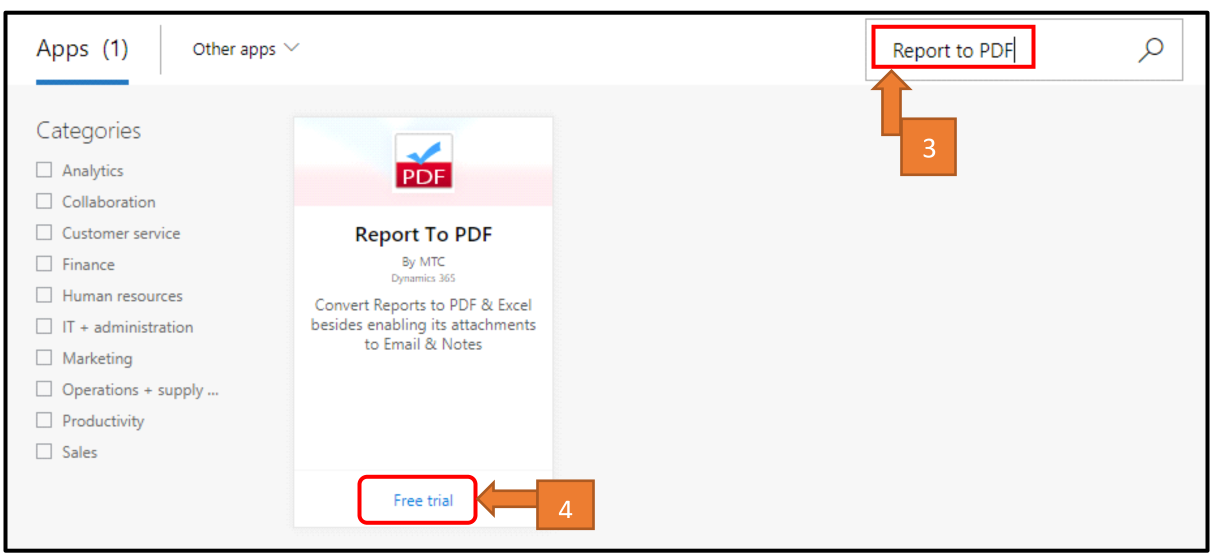
Step1:

- Navigate to **Dynamic 365 -> Settings** and click on **Dynamics Marketplace**.



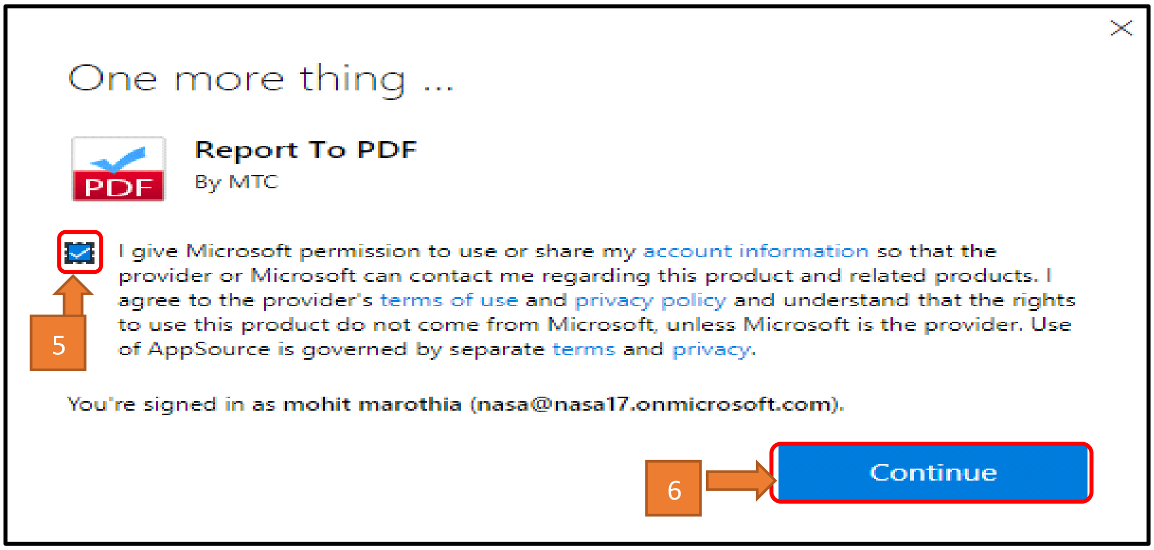
Step2:

- In the search box, search for **Report to PDF by MTC** and click on **free trial**.



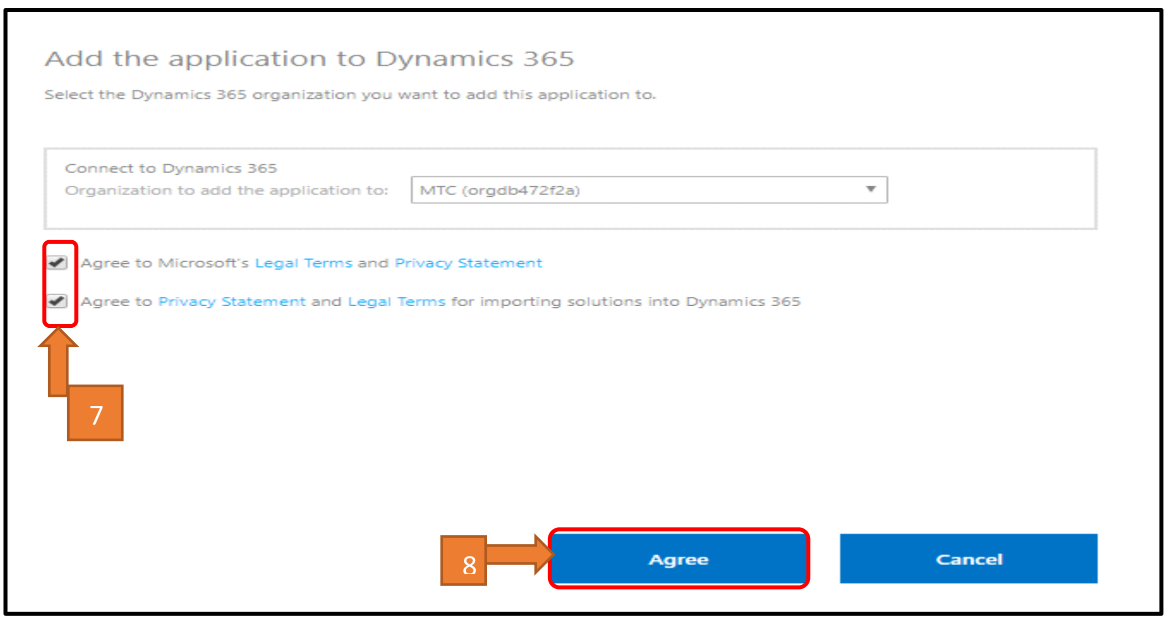
Step3:

- Please tick the **Check Box** to give permissions and click on **Continue.**



Step4:

- Please tick the two check boxes to agree **Microsoft Legal Terms and conditions** and agree to **Privacy Statement and Legal Terms** and click on **Agree** for importing the solution.



Step5:

- After clicking on agree, the **Installation Process Begins**.

Dynamics 365 Portals - Par...	8.3.0.215	1/1/2050	Not installed
Dynamics 365 Sales Applic...	1.0.0.1	1/1/2050	Installed
E-PDF	365.72017.3.3	1/1/2050	Installation pending
Field Service	6.2.1.38	1/1/2050	Not installed

Step6:

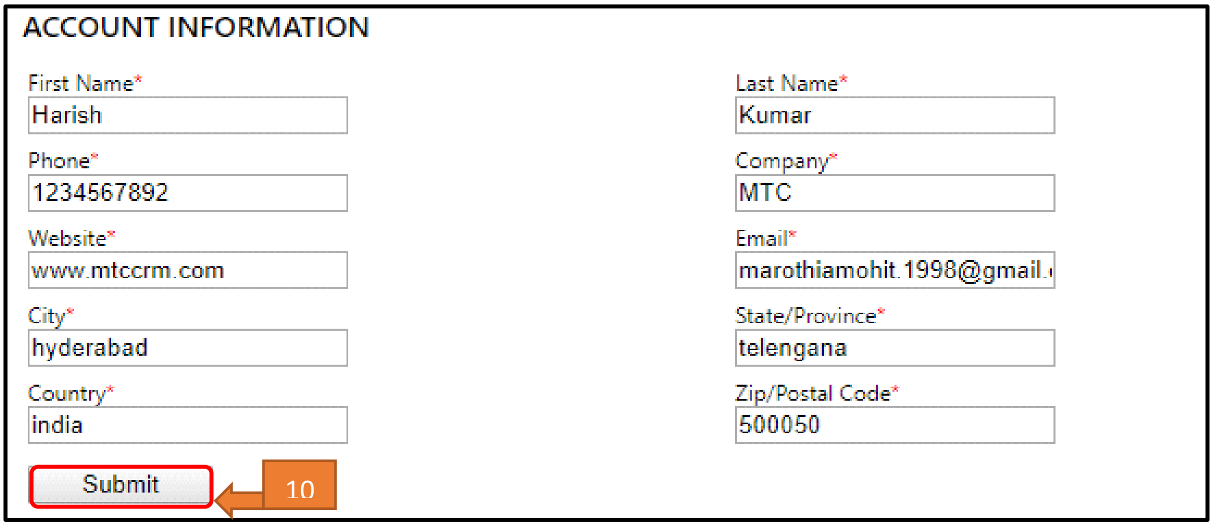
- After completing the installation, you will notice that **licensing solution** also installed along with **EPDF Solution**.

- To get the free trial Click on **licensing solution.**

EPDFRibbonSolution	EPDFRibbonSolution	1.0.0.0	7/9/2018	Managed	Management Technology Cons...
EPDF	E-PDF	201516.12...	7/9/2018	Managed	Management Technology Cons...
ActivitiesTab	Activities Tab	1.0.0.0	7/4/2018	Unmanag...	Default Publisher for grid3212
testSolution	testSolution	1.0	7/3/2018	Unmanag...	Default Publisher for grid3212
Licensing	Licensing	2.0.0.3	7/3/2018	Managed	Management Technology Cons...
Licensing	Licensing	2.0.0.3	7/3/2018	Managed	Management Technology Cons...
ResourceSchedulingD...	Field Service Demo Da...	1.2.0.1	6/23/2018	Managed	Microsoft Dynamics

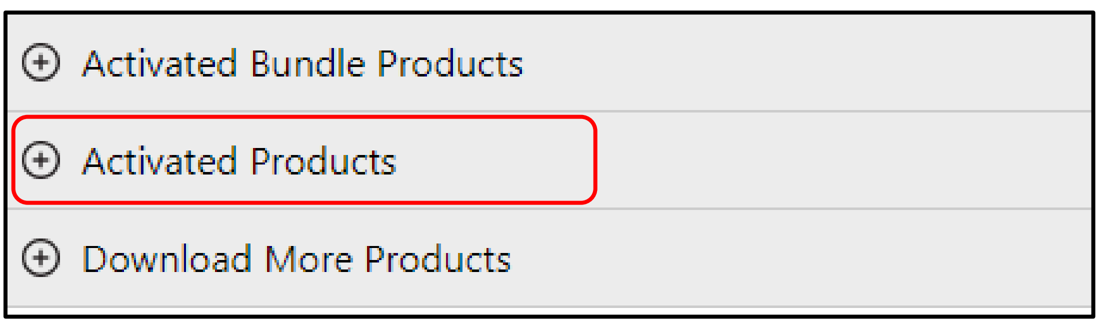
Step7:

- Please fill up the **Account Information** and click on **submit**. **“This will be a onetime activity.”**



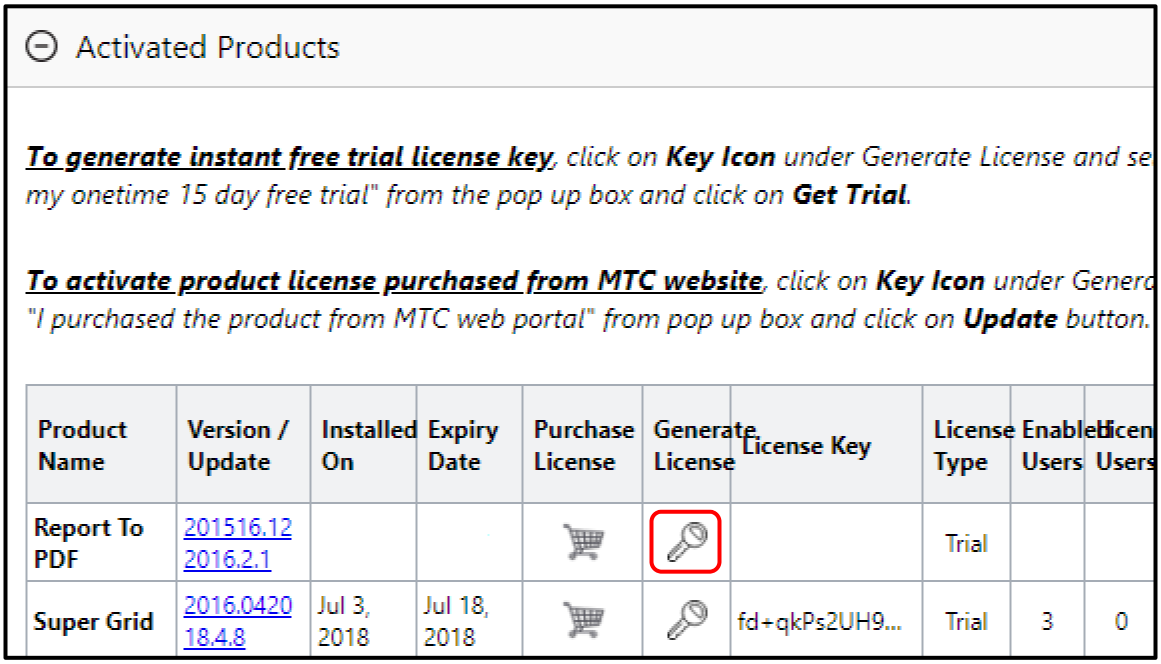
Step8:

- Below the Account Information, click on **Activated Products** to generate the Trail License key.



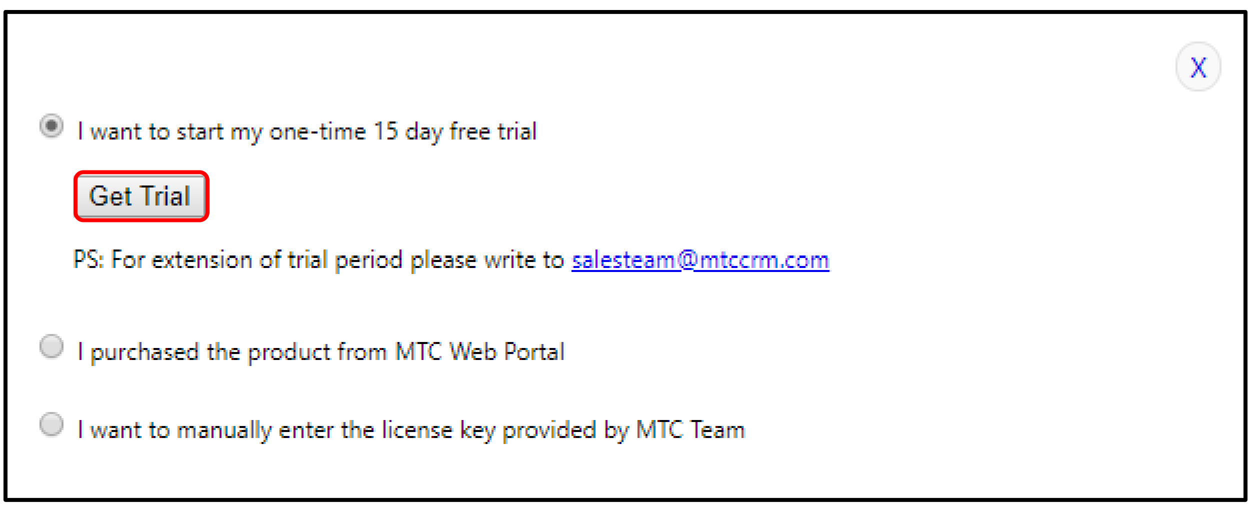
Step9:

➢ Click on the **Key button**.



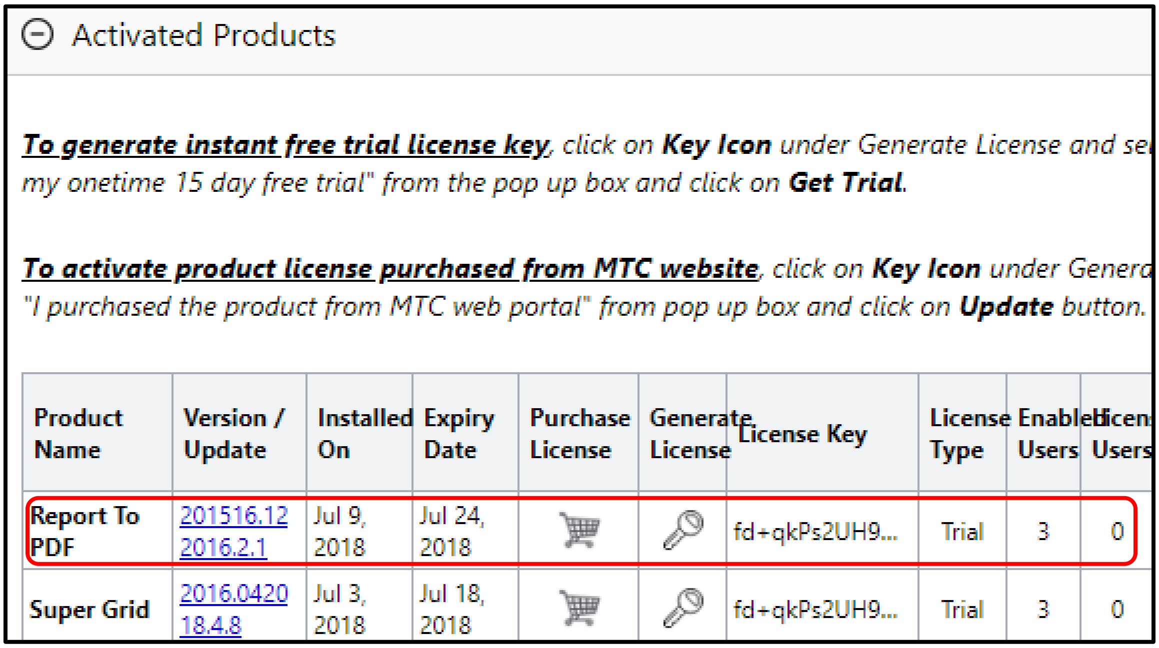
Step10:

➢ Select **Get Trial** to start the trail subscription for the solution.



Step11:

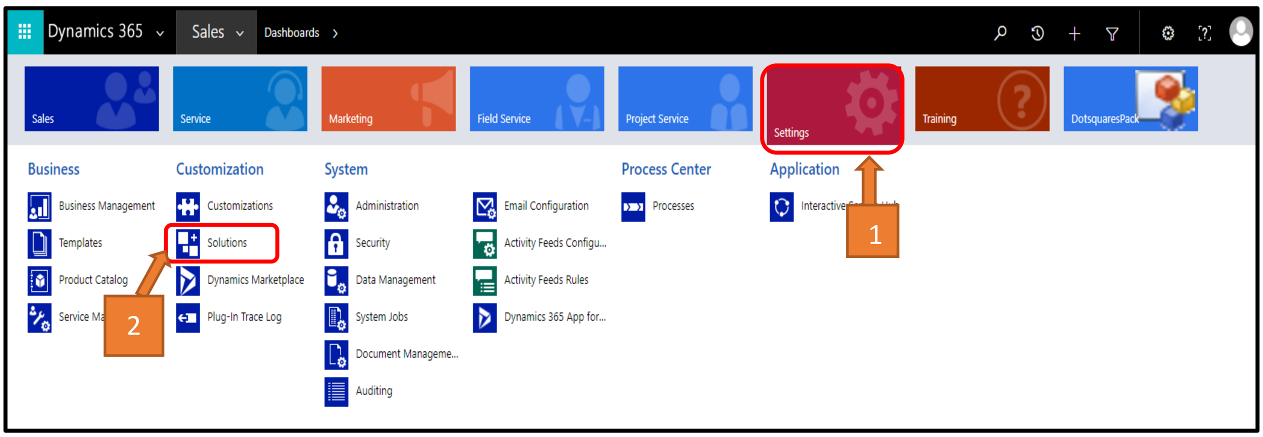
- After clicking on Get Trial, the trail for the solution will be activated for 15 days as shown in the below image.



Configuration Settings in Report to PDF

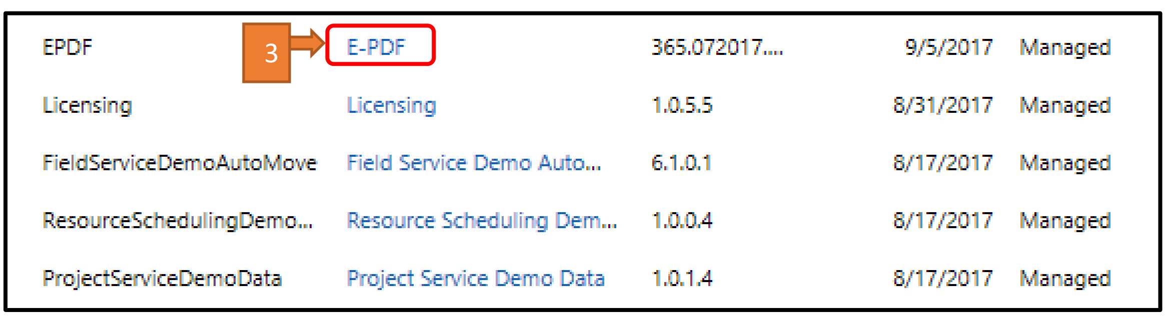
Step1:

➢ Navigate to **Dynamic 365 → Settings** and click on **solutions.**



Step2:

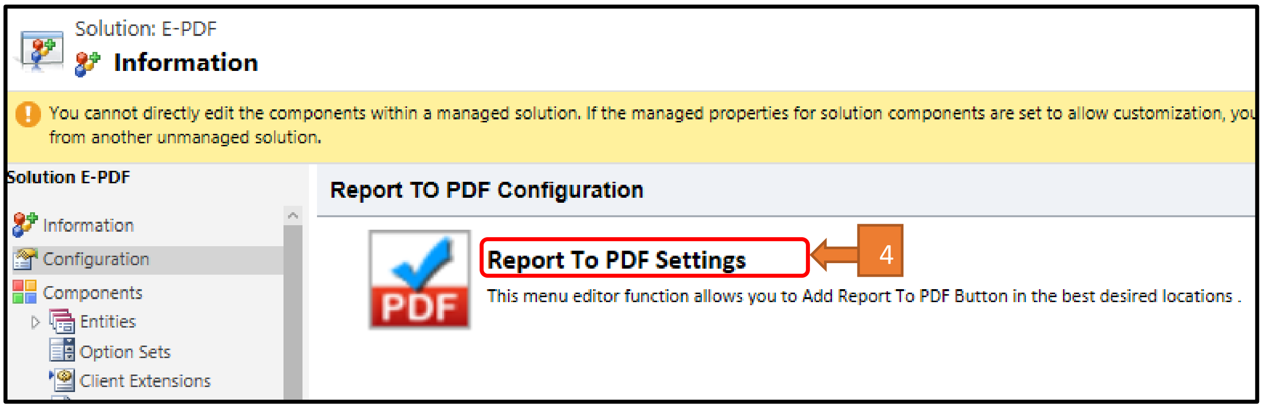
➢ Click on **E-PDF** to start the process of configuration.



EPDF	E-PDF	365.072017....	9/5/2017	Managed
Licensing	Licensing	1.0.5.5	8/31/2017	Managed
FieldServiceDemoAutoMove	Field Service Demo Auto...	6.1.0.1	8/17/2017	Managed
ResourceSchedulingDemo...	Resource Scheduling Dem...	1.0.0.4	8/17/2017	Managed
ProjectServiceDemoData	Project Service Demo Data	1.0.1.4	8/17/2017	Managed

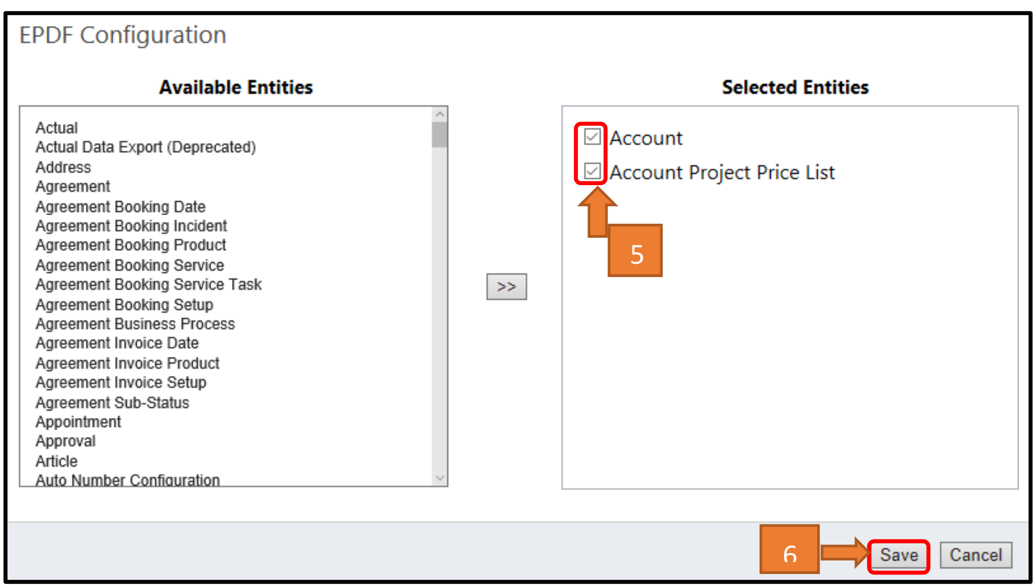
Step3:

- Click on **Report to PDF Settings.**



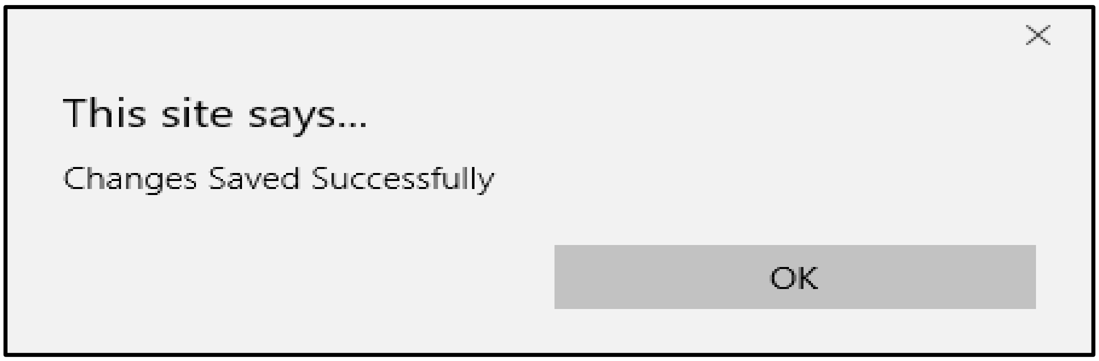
Step4:

- From the left hand side “Available Entities” box, select the **Entities** for which you want to apply Report To PDF functionality and click on Double Arrow **“>>”** so that it is moved to Selected Entities box on the right hand side.
- Again from the right hand side “Selected Entities” box, tick the check boxes for the entities you would like to apply Report to PDF functionality and click save.
- For your understanding, we will consider Account entity and apply Report to PDF functionality following the above steps.



Step5:

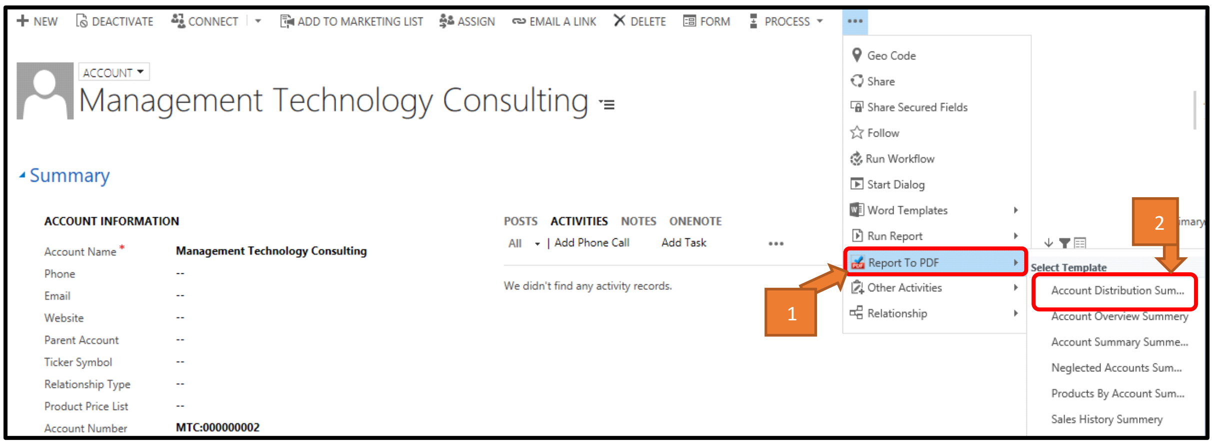
- A "Changes Saved Successfully" popup message will be displayed. Click OK.



Report to PDF Functionality:

Step1:

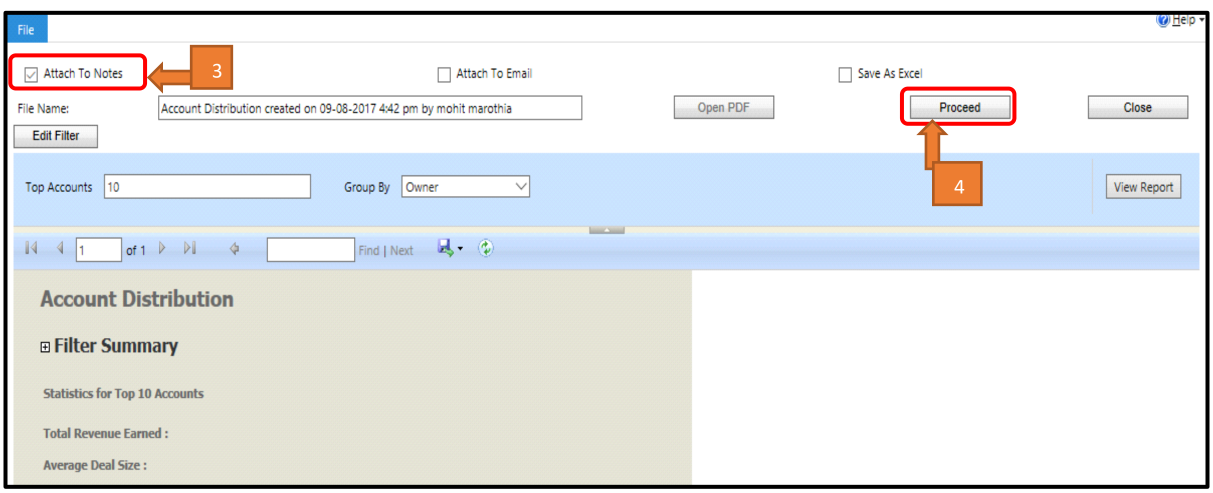
- Navigate to **Dynamic 365** and click on **Sales** and select **Accounts.**
- Create a **new Account record**. Click on **more** options and click on **Report to PDF**, and select any templates (refer image below) as for example let's find out how it's working on **Account Distribution Sum.**



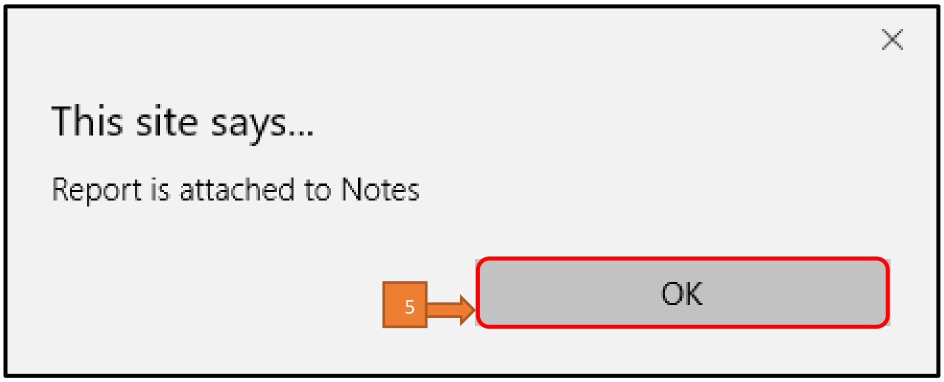
- You can **Attach to Notes**, **Attach to Email**, **save as Excel** and **open as PDF file** the Account Distribution Sum report.

Attach To Notes:

- Select the check box of **Attach to Notes** and then click on **Proceed**. File name is auto generated.



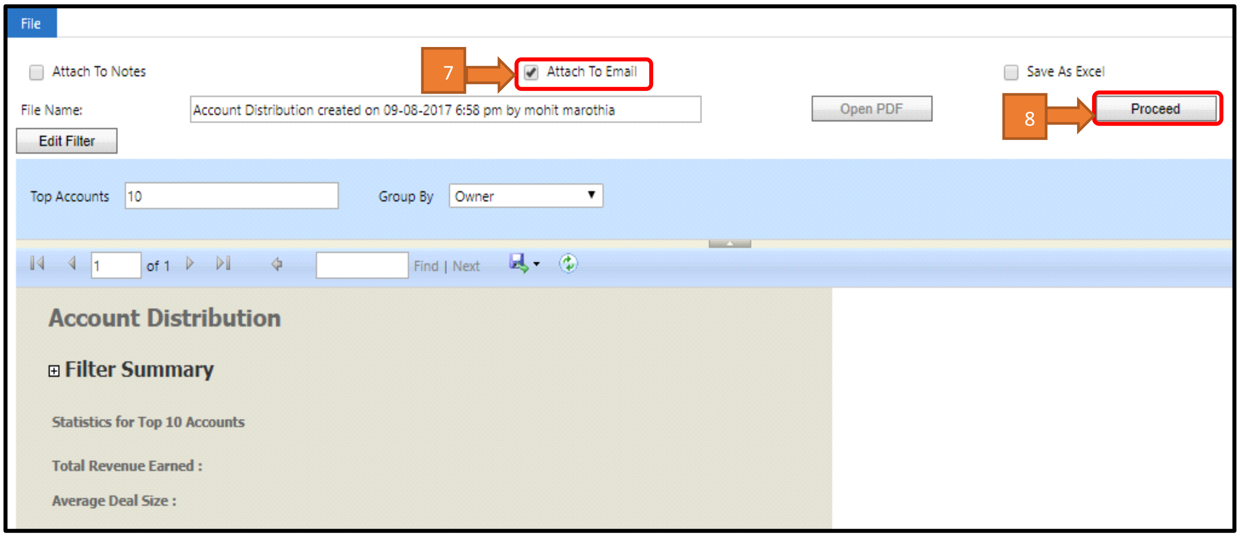
- After clicking on Proceed, a window box opens and displays message as **Report is attached to Notes**. Click on **OK**.



- The selected report will be attached as Notes. To know where it is saved click on the **NOTES** as shown in figure below.

Attach To Email:

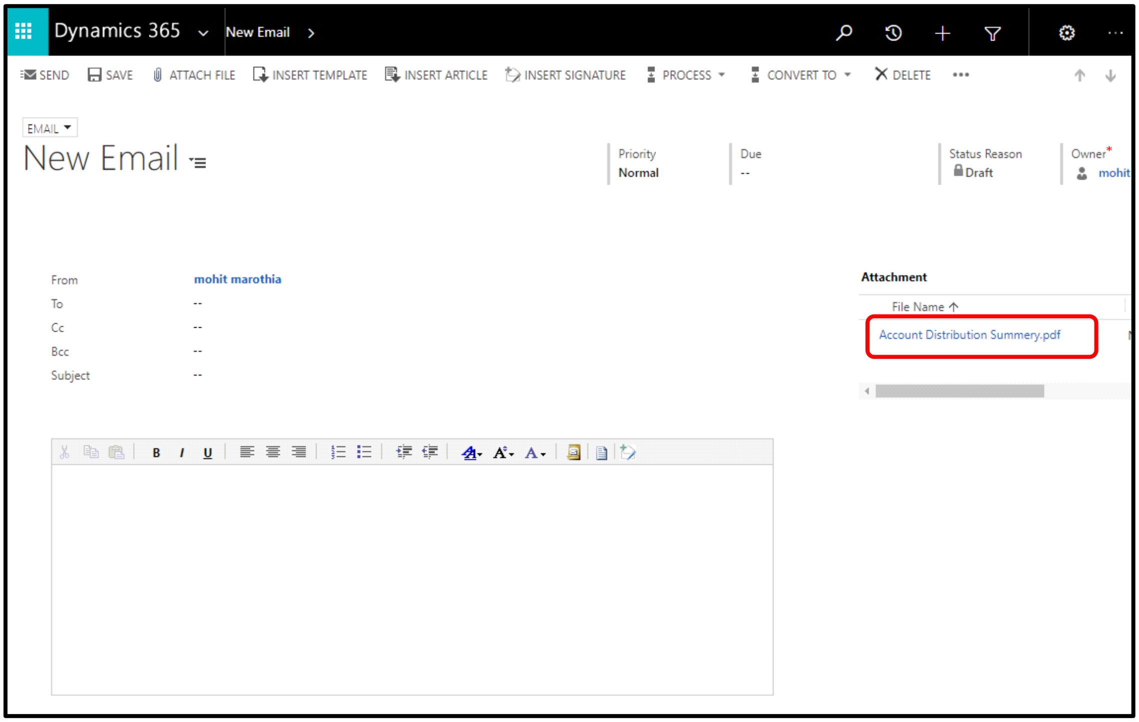
- Select the check box of **Attach to Email** and then click on **Proceed**. File name is auto generated.



- After clicking on Proceed a window box opens and displays message as **Report is attached to email**. Click on **OK**.

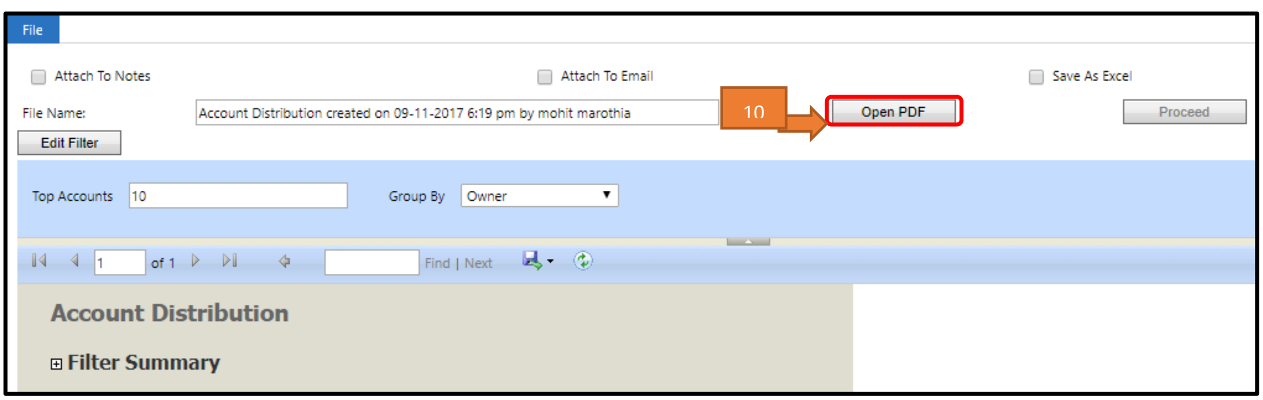
- A new window will open with Email and attachment details. In Attachments you can see the PDF file attached as **Account Distribution Summary.pdf** Attach to Email as shown below figure.

- You can send this email by clicking **Send** button in **CRM ribbon**.



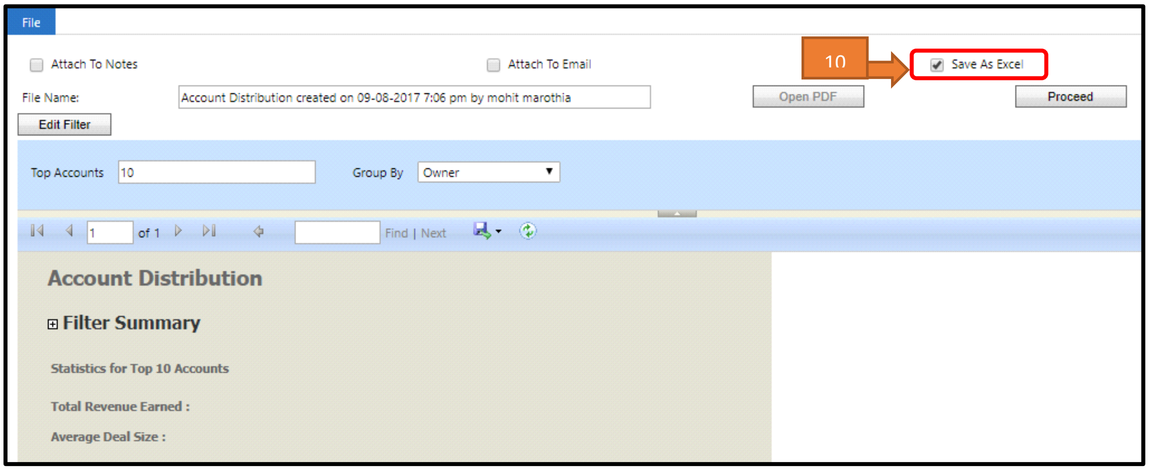
Open PDF:

- Click on **Open PDF** to download the report in the form of PDF.
- A new window will open where the PDF files has been downloaded.



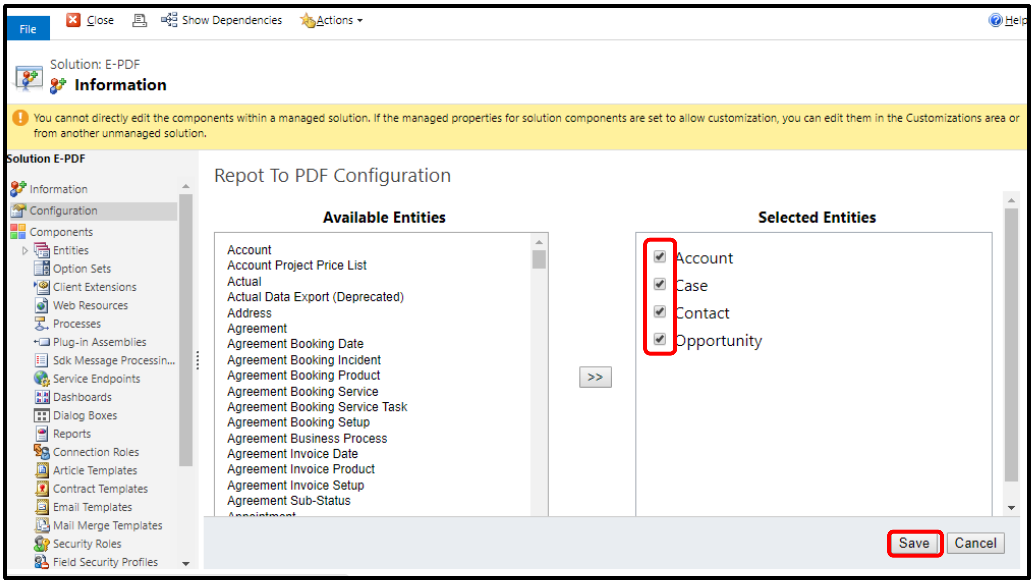
Save To Excel:

- Select the check box of **Save to Excel** and then click on Proceed. File name is auto generated.
- A new window will open with the downloaded **Excel sheet** and you can open that excel sheet from the new window

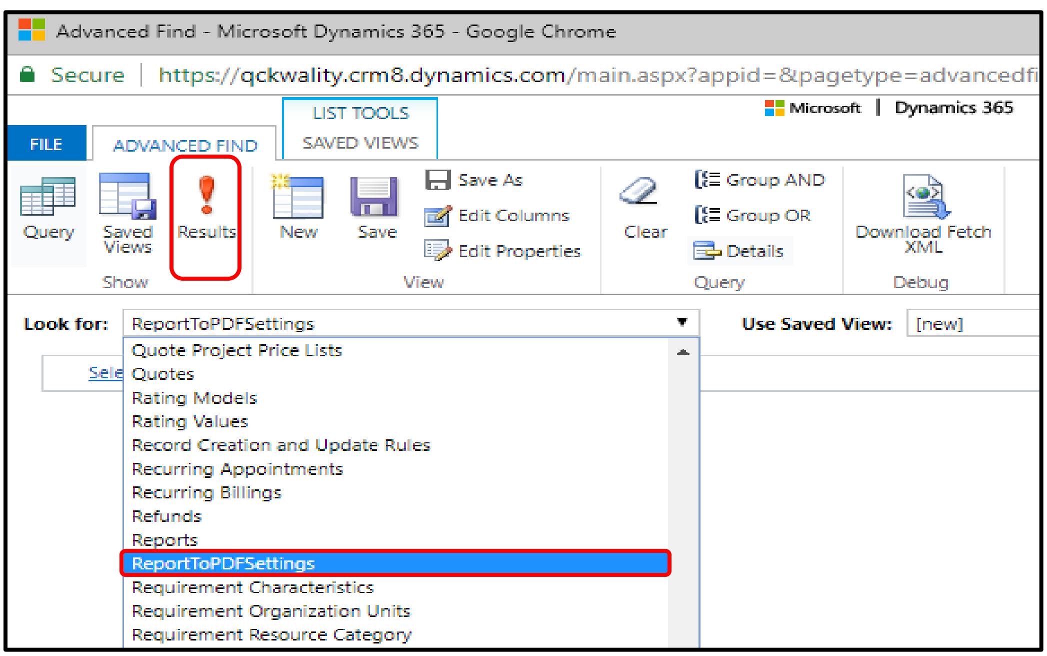


Renaming File Name:

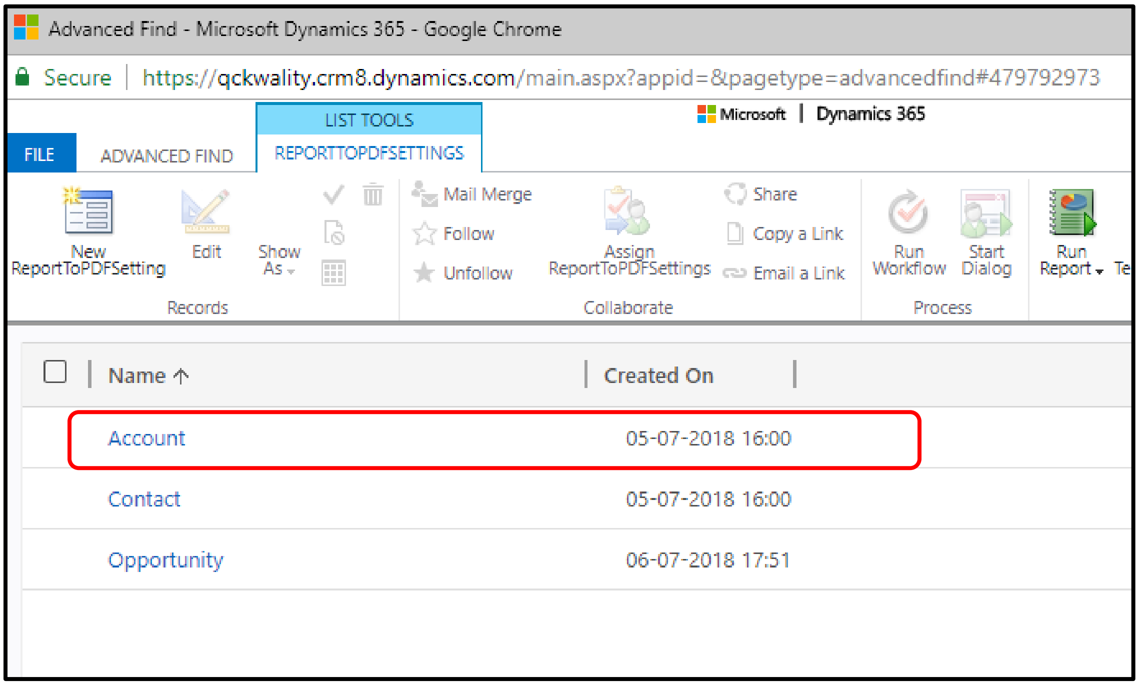
- Navigate to **Dynamics 365 → Settings → Solution**.
- Double click on the **E-PDF** Solution to configure the Entities.
- A new tab will open as Configuration page. Select the entities which you want to configure for Report to PDF solution, Click on **Save**.



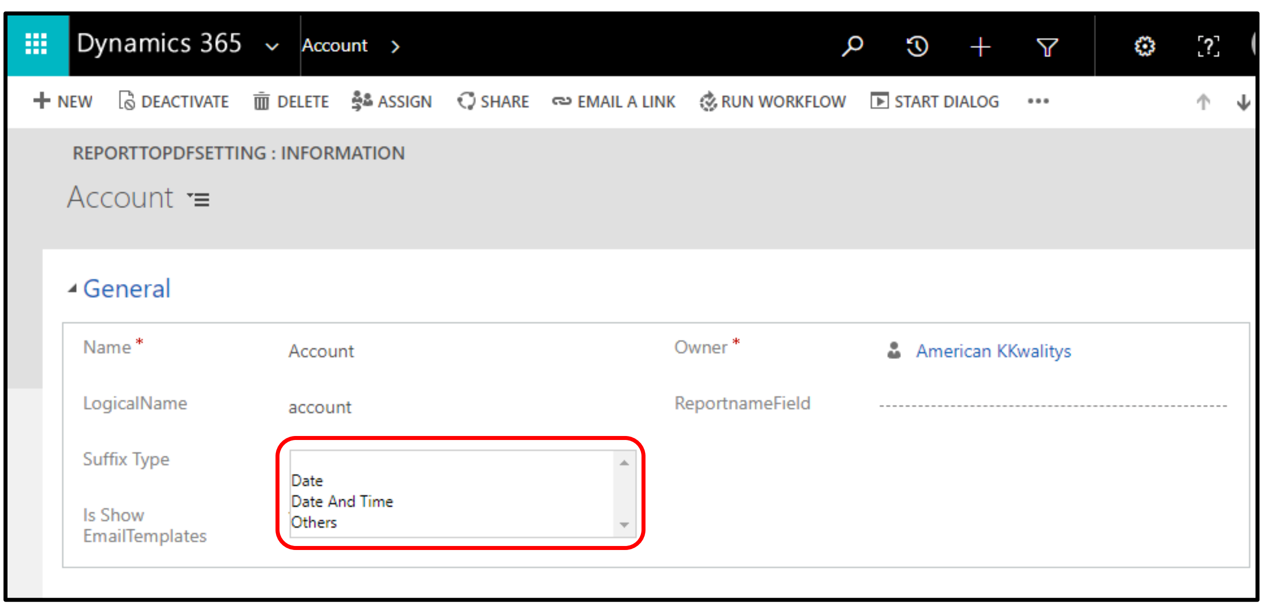
- After configuring the entities, navigate to **Advance Find**.
- In Lookup, search for **ReporttoPDFSettings** and click on **Results**.



- You will see the list of configured entities as shown below.
- Let's check how to rename an account file. Select **Account**.

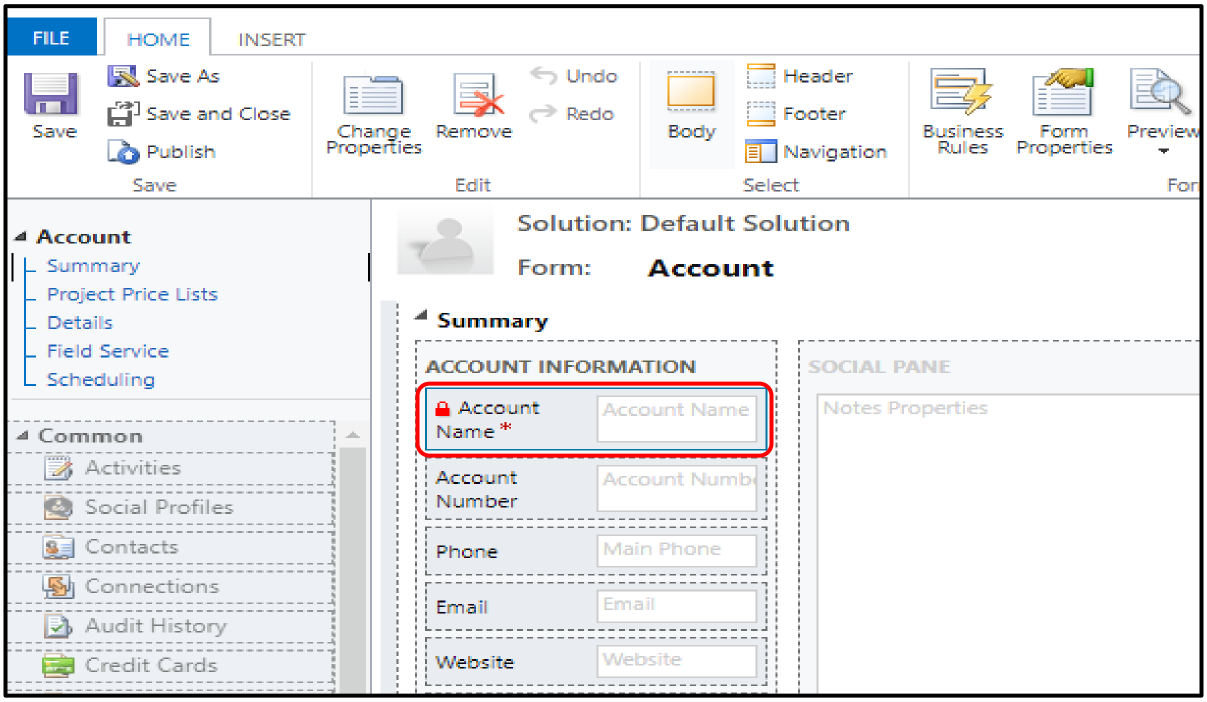


- A new window will open.
- Fields like: **Name**, **LogicalName**, **Owner** will be default filled.
- Fields like: **Suffix Type**, **ReportnameField** has to be filled.

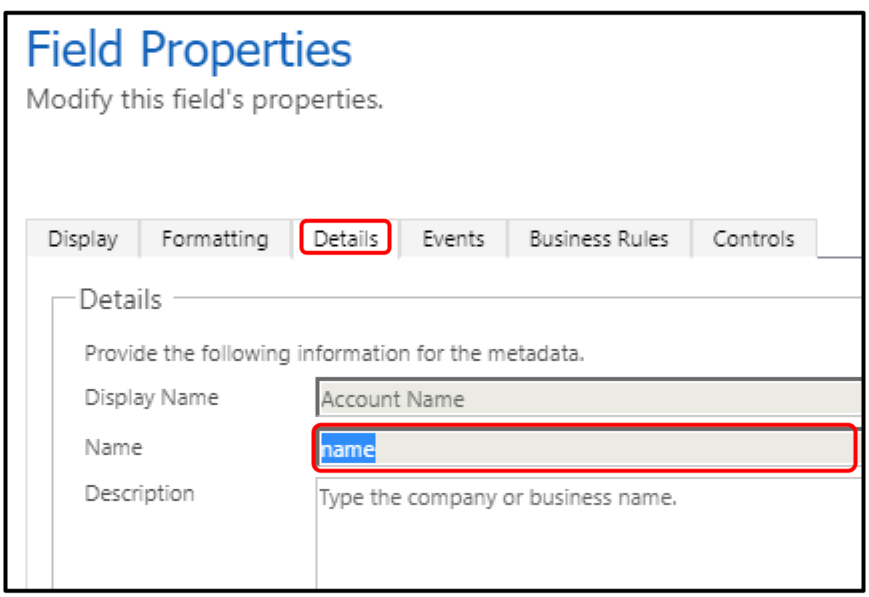


Suffix Type: There are three types of Suffix Types namely, **Date**, **Date and Time, Other**.

- ReportnameField: In order to fetch the data for this field, navigate to **Sales → Accounts** and select any records and go to **Form Editor**.
- After navigating to form Editor double click on the field whose field's record name you want to append on to the reports. For example, let's take **Accounts Name**.

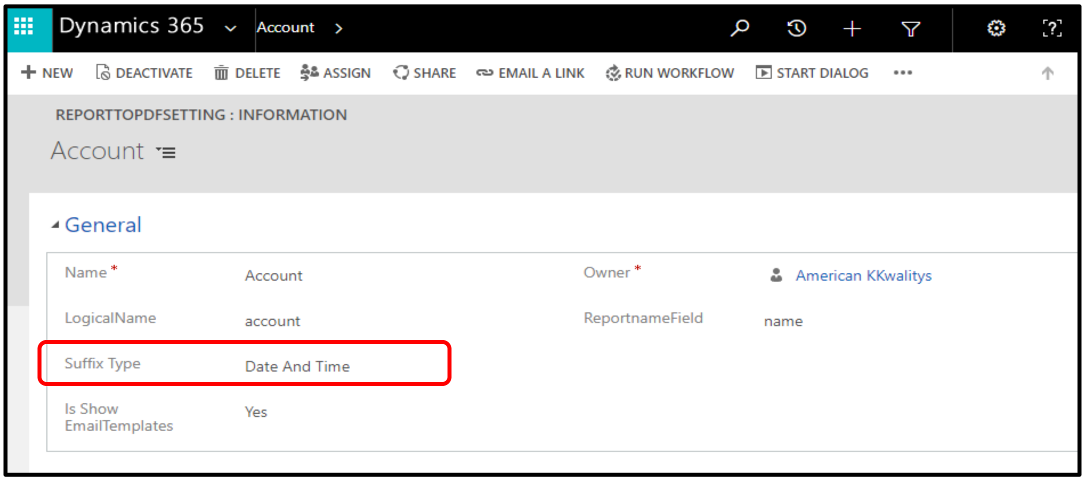


- Click on **Details** and copy the Name field **(name)** and paste it on the ReportnameField.

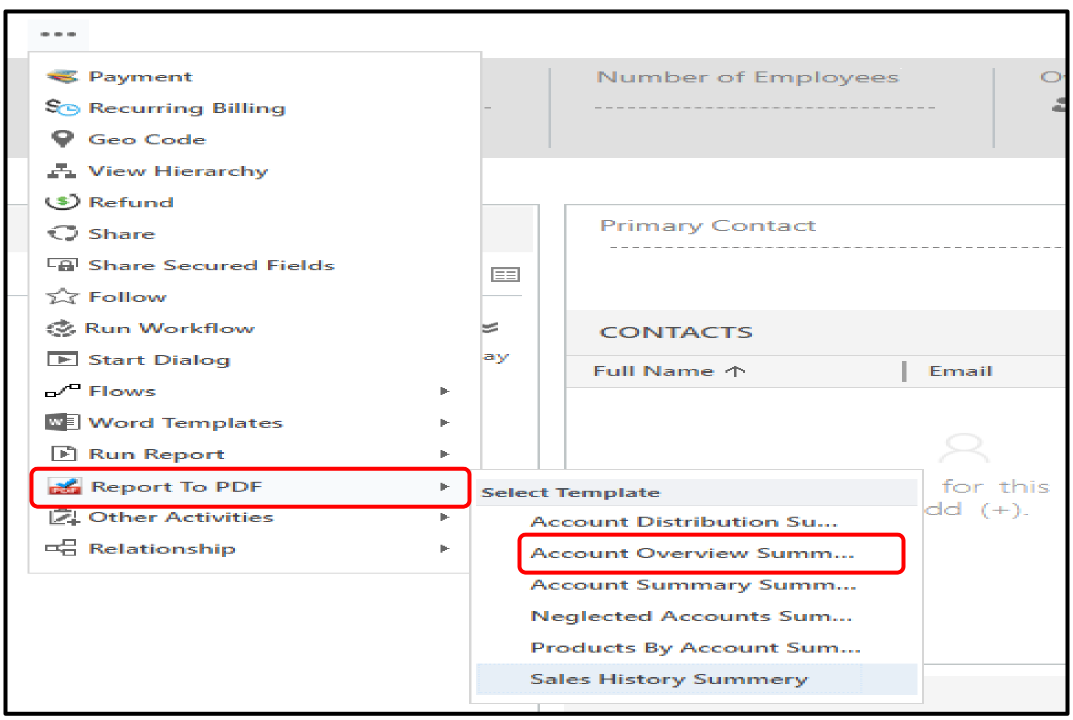


Functionality: Date and Time

- Use Suffix as **Date and time** and click on **Save**.

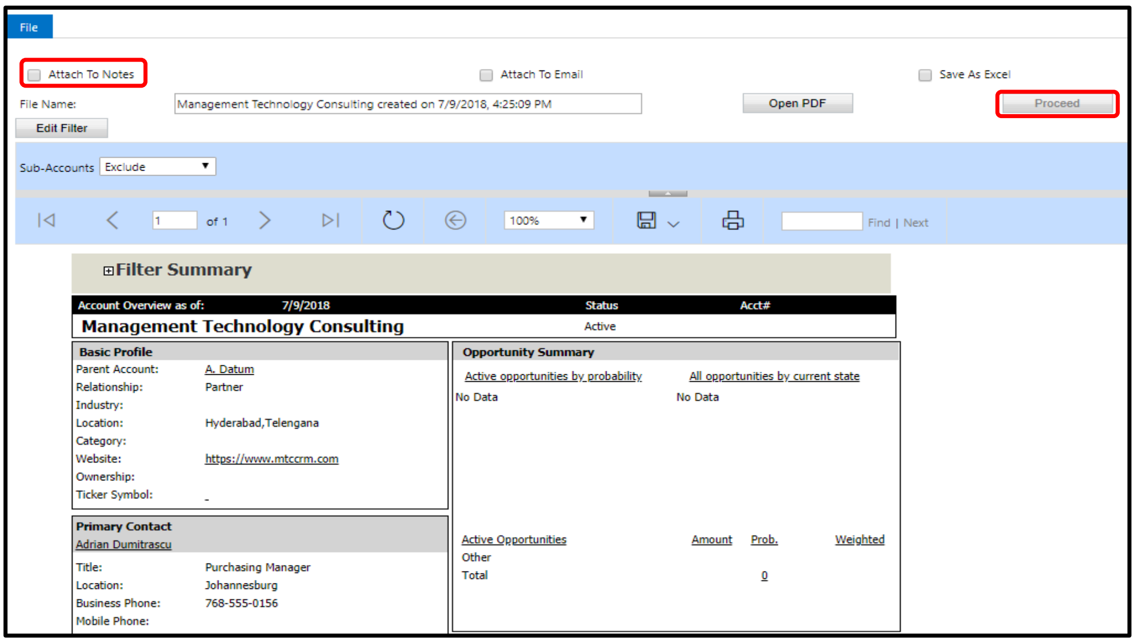


- Navigate to **Sales → Accounts** and open an existing record.
- Click more commands and from the dropdown click on **Report to PDF button**.
- Select the template for which you want to generate the PDF report. For example, let's take Accounts Overview Summary.

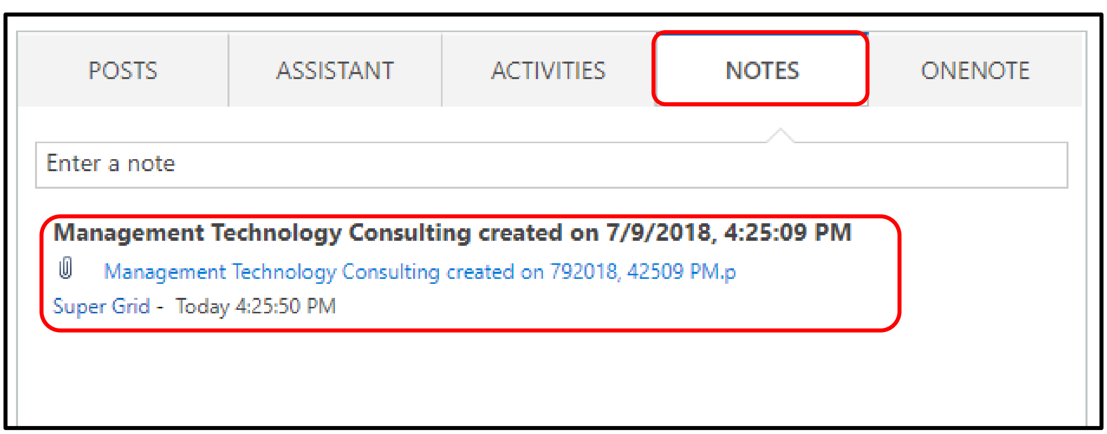


- ➢ You can see the report has been generated and the file name includes Date and Time as saved in Report to PDF configuration settings.
- ➢ Tick the check box "**Attached to Notes,**" if you want to add this report to Notes.
- ➢ Tick the check box, "**Attach to Email,**" to attach this report to an Email for directly sending to clients from CRM.
- ➢ Tick the check box, "**Save as Excel,**" to save and open the report as in Excel format.

Below is the reference image which demonstrates "Attach to Notes" for Account Overview Summary.

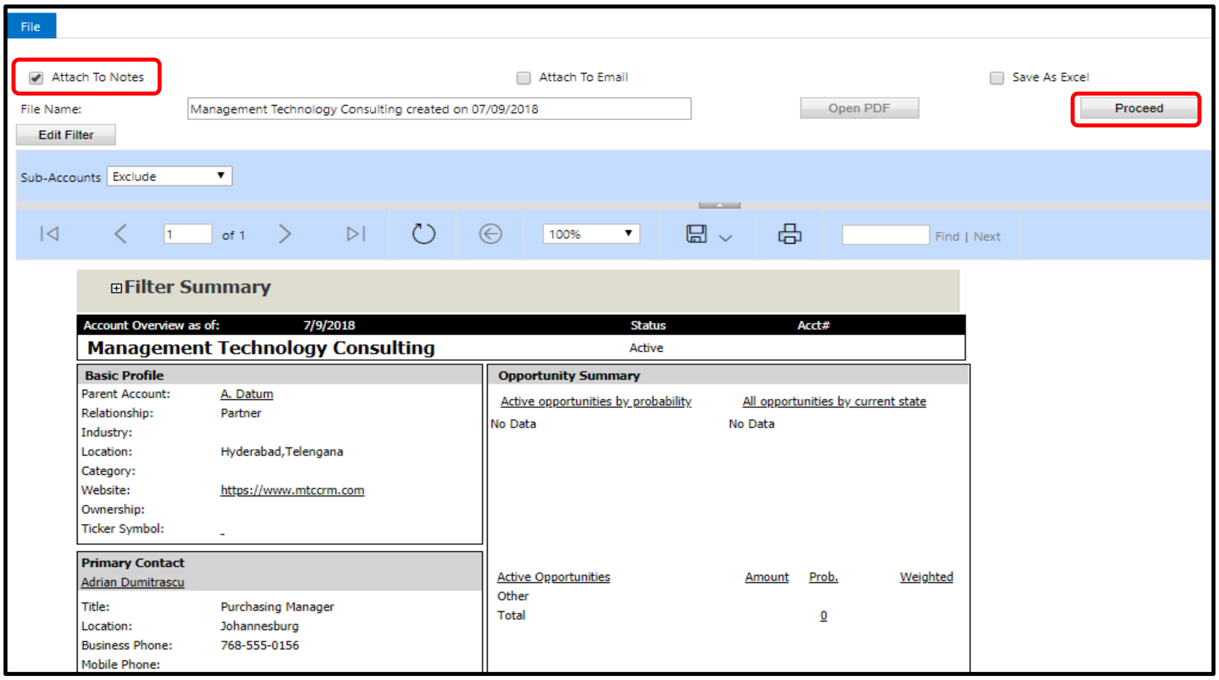


- Navigate to the NOTES tab of that particular record.
- You can see that the report has been attached to NOTES with the name changed as per Suffix, i.e., Date and Time.

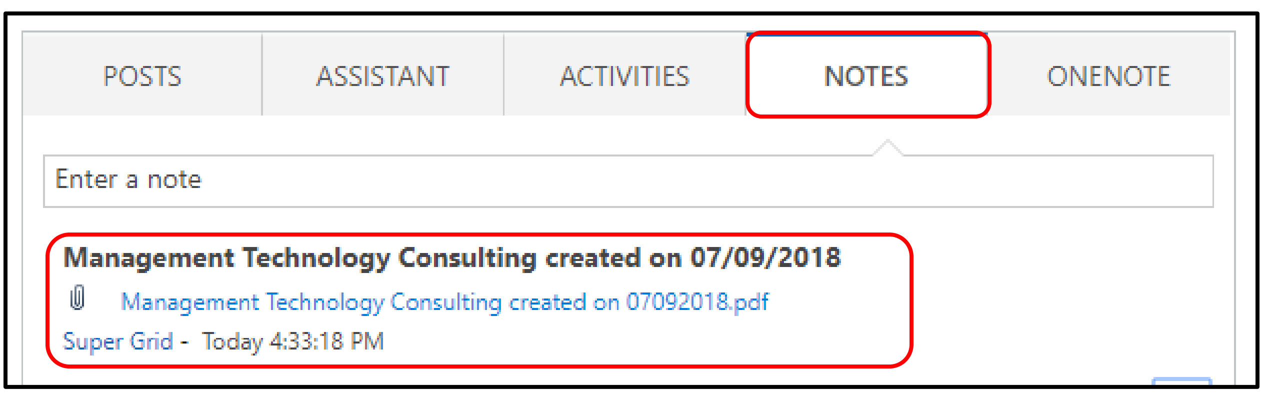


Functionality: Date

- Use Suffix as **Date** and click **Save**.
- Follow the same procedure as discussed in Functionality: Date and Time.
- You can see the report has been generated and the file name includes Date as saved in Advance Find.
- Tick the checkbox "**Attach to Notes**" and select **Proceed**.

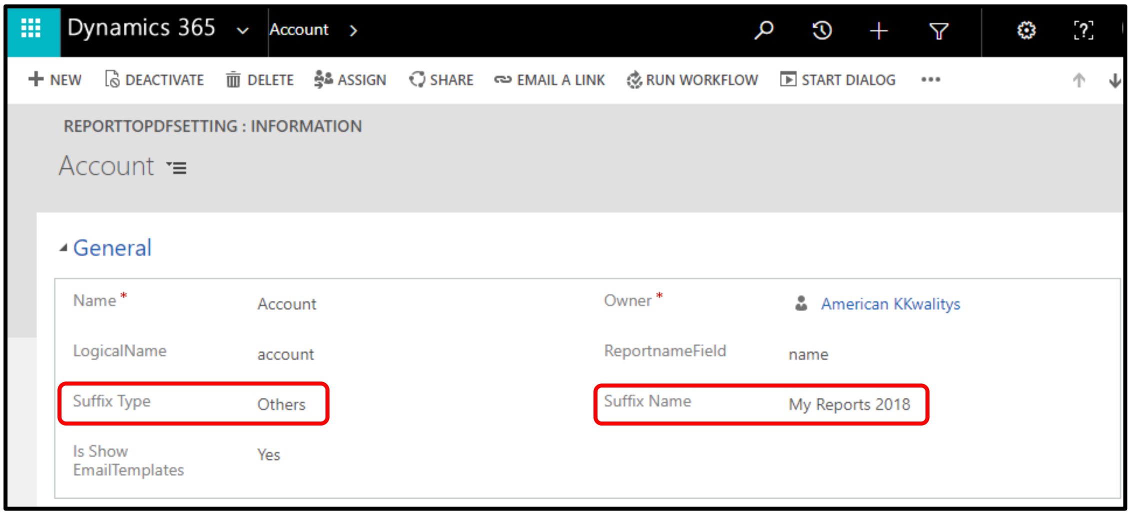


- Navigate to the NOTES tab of that particular record.
- You can now see that the report has been attached to notes with the name being changed as per the suffix, i.e., Date.

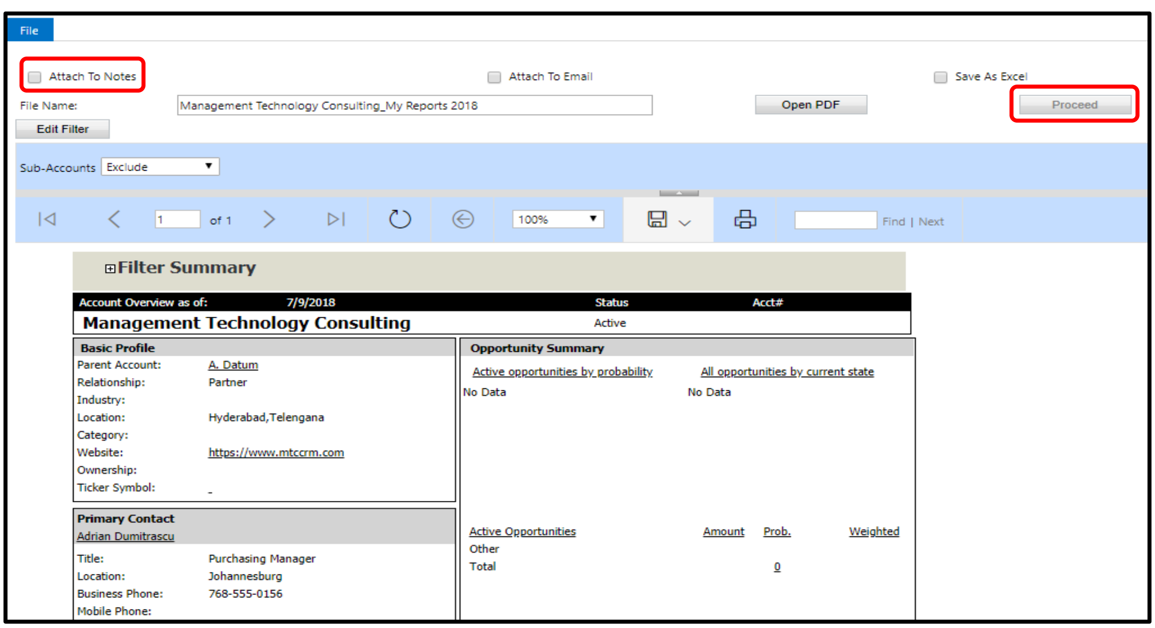


Functionality: Others

- Use Suffix Type as "**Others**" and click **Save**.
- A new field "Suffix Name" will be unlocked.
- Enter the report name of your choice in the Suffix Name field. For example, let's add "**My Reports 2018**"in this field.

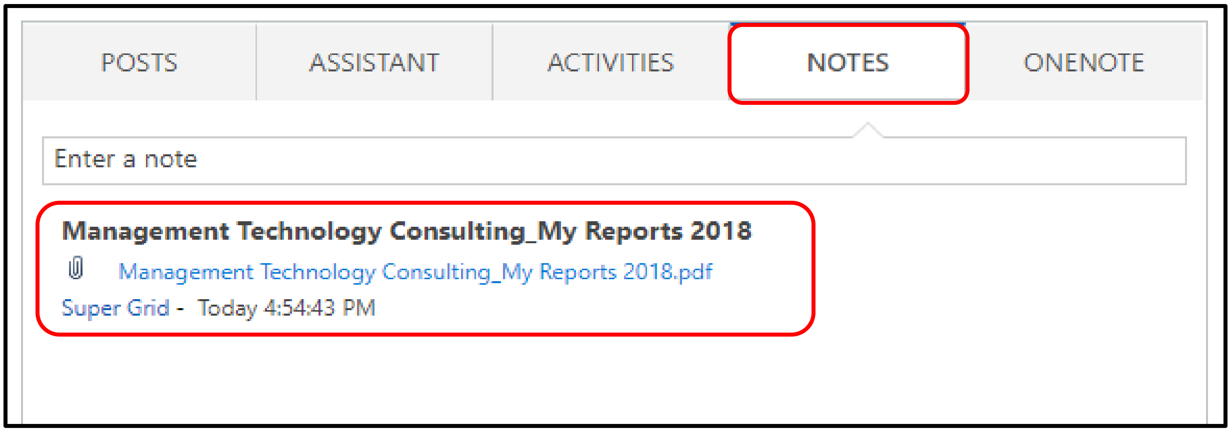


- Follow the same procedure as discussed in [Functionality: Date and Time](#) .
- You can see that the report has been generated and the file name includes My Reports 2018 (Suffix Name).
- Tick the checkbox "Attach to Notes" and select Proceed.



➢ Navigate to the NOTES tab of that particular record.

➢ You can now see that the report has been attached to notes with the name change as per the Suffix Name given in the configuration settings.



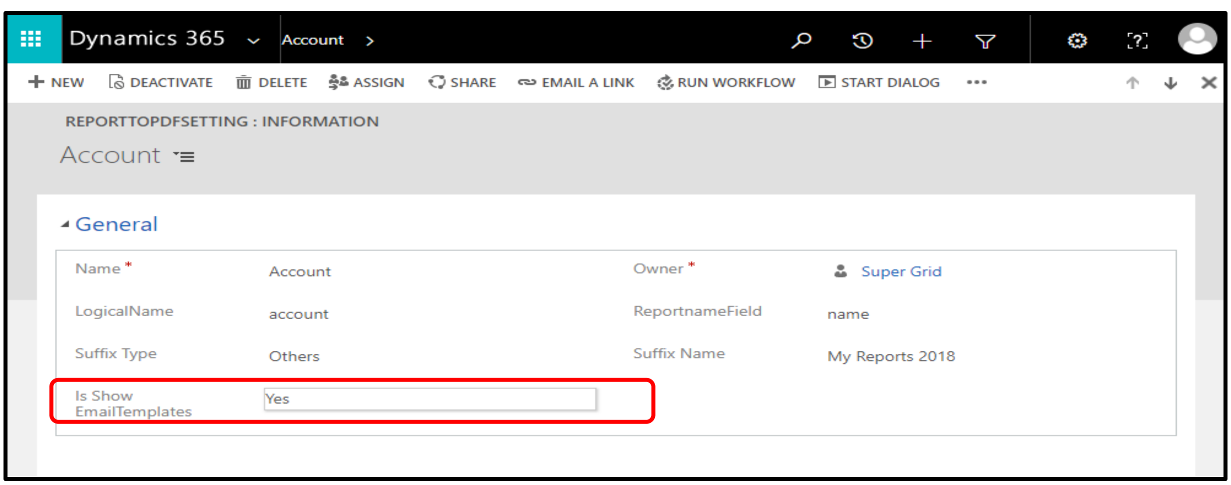
<u>Note:</u>

- Renaming File feature is applicable on others too (Attach to Notes, Attach to Email and Attach to Excel).
- We have demonstrated the functionality only on Attach to Notes only for Documentation Purpose.

Email Template:

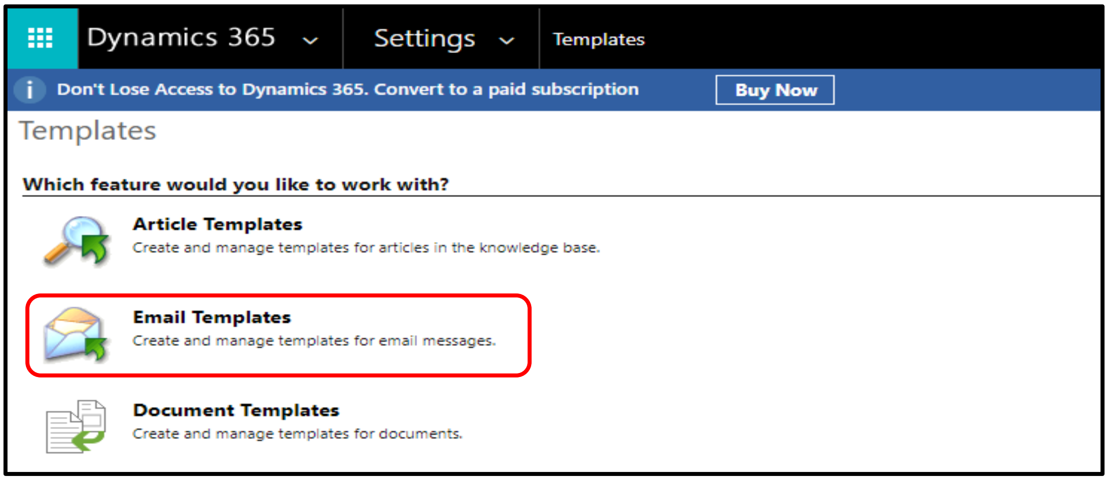
This feature helps you to pick up pre-defined email templates to which you can attach reports using Report to PDF functionality.

➢ To set this feature. Go to **Is Show EmailTemplates** from the settings page as shown below.

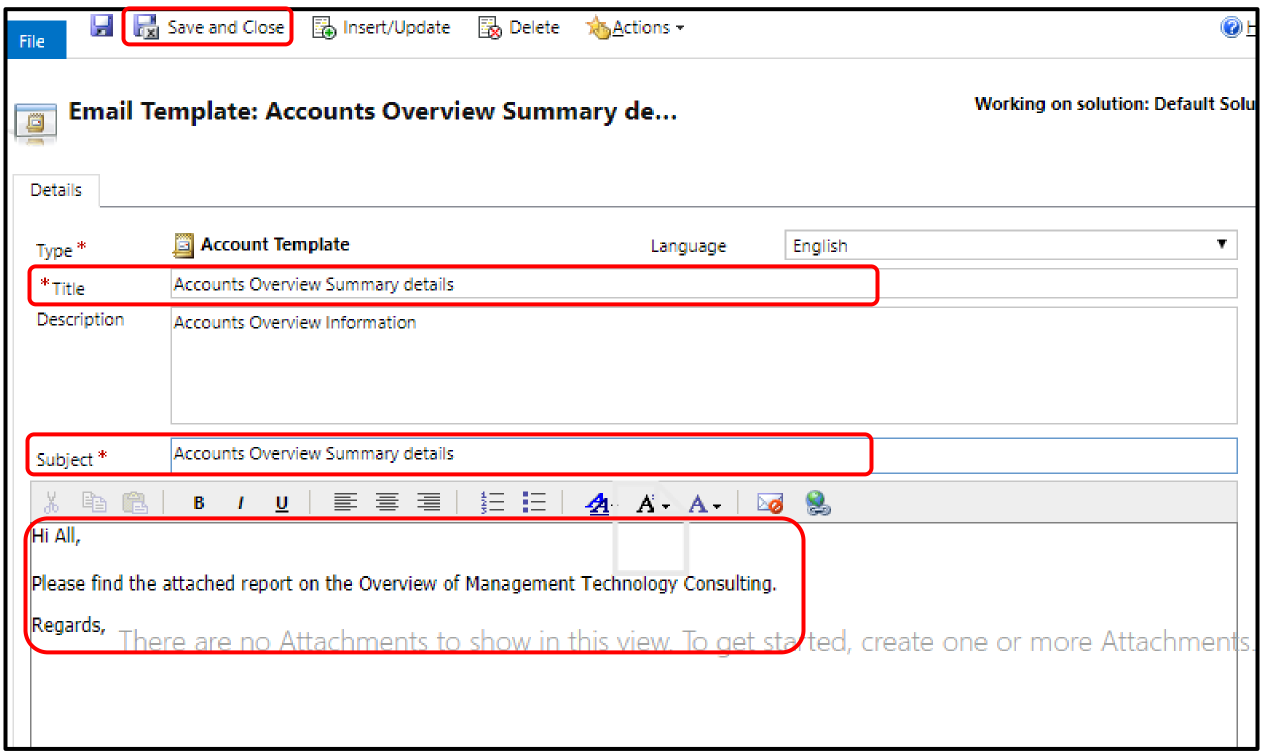


➢ Set **Is Show EmailTemplates** as Yes to use pre-defined email templates.

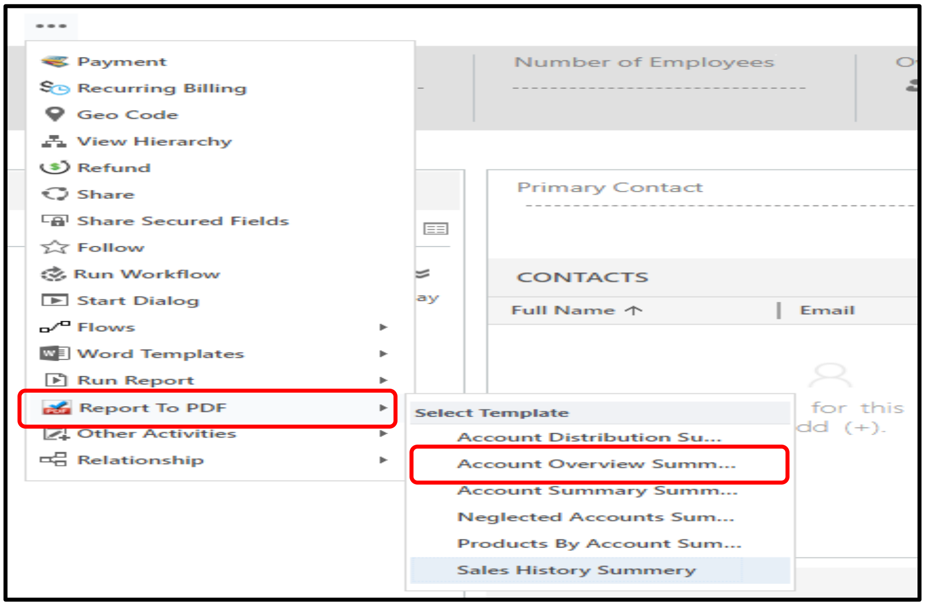
➢ To add Email Templates inside your CRM, navigate to **Dynamics 365 → Settings → Templates → Email Templates.**



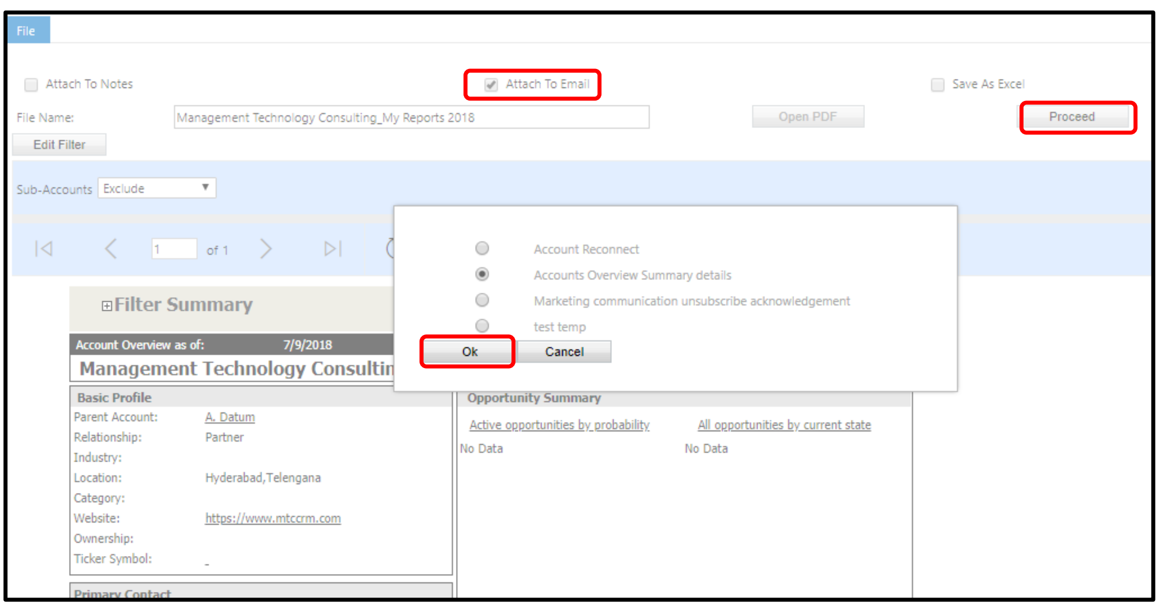
➢ Create a new Email template with **Title** of the template, Subject and also email body and save it as shown in the below image.



- Once the Template is added, navigate to **Sales → Accounts** and open an existing record.
- Click on more commands button and then click on **Report to PDF button** from the dropdown.
- Select the template of your choice, which you want to convert to report.

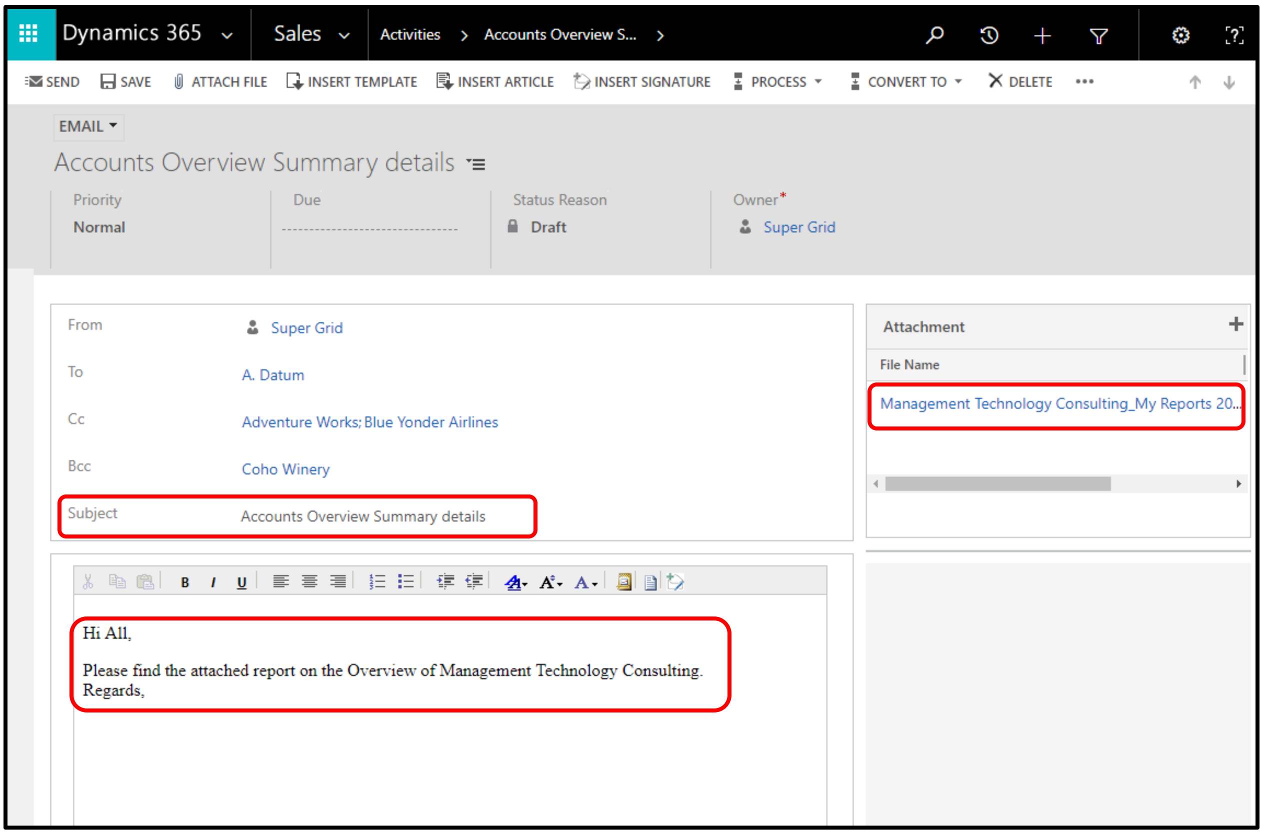


- Report window will be open. Tick the checkbox “**Attach to Email**” and select **Proceed** to get the email templates as shown in the below image.



- Select any template of your choice and click **OK**.

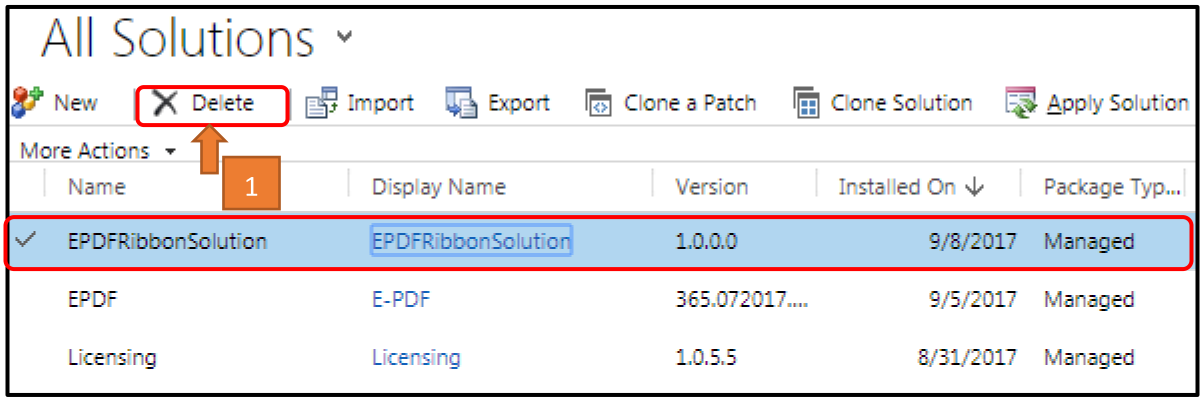
- An email window will automatically popup with title, subject, email body and attachment duly filled. Simply select the To, Cc (optional) and Bcc (optional) to send the email with PDF report attachment.



Uninstall Report to PDF

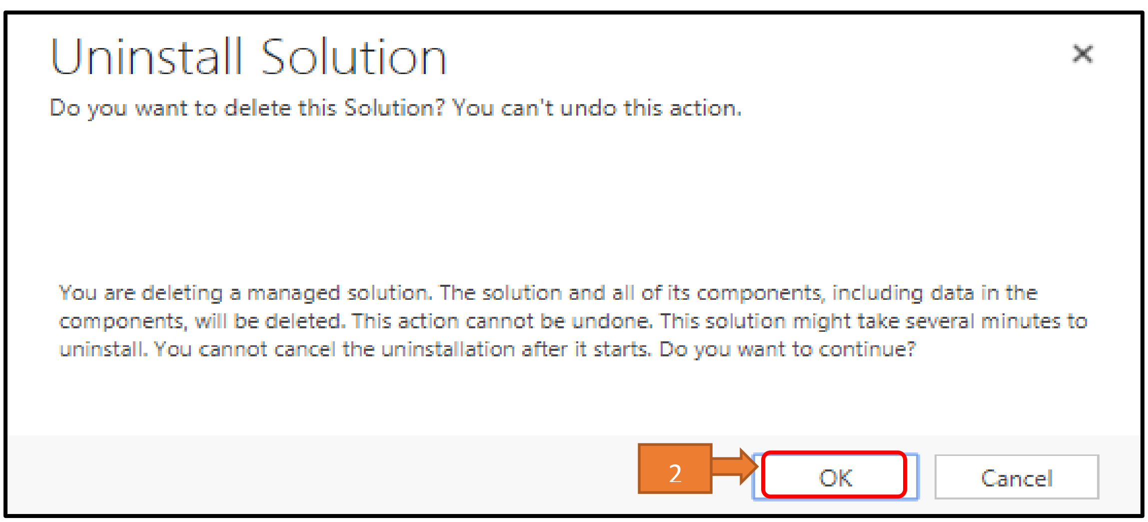
Step1:

- Navigate to **Dynamic 365 -> Settings** and click on **Solutions.**
- Upon Configuring the Report to PDF setting will get **EPDFRibbonSolution**. In order to delete the **EPDF solution** first we need to delete **EPDFRibbonSolution**.
- Select the solution and click on **Delete**.



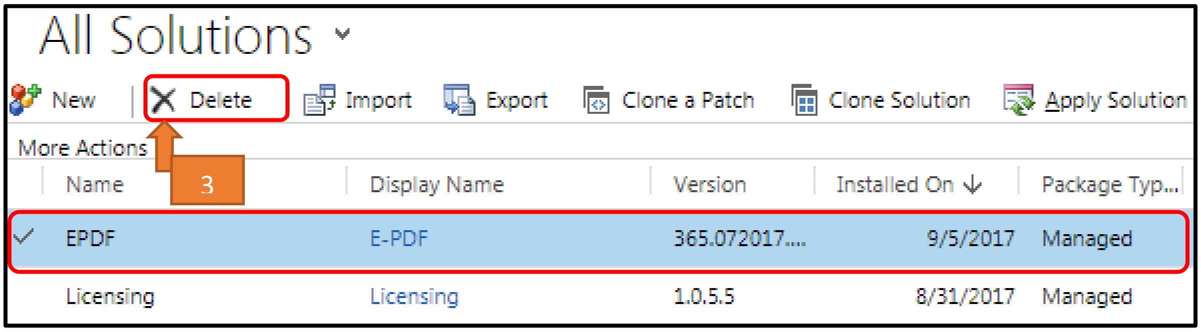
Step2:

- Click on **OK** to start uninstallation process of **EPDFribbonSolution**.



Step3:

- Select **EPDF solution** and click on **Delete**.



Step4:

- Click on **OK** to start uninstallation process of **EPDF Solution**.