



 Microsoft Dynamics[®] CRM

Dynamics PDF Generator

Contents

Overview	3
Features.....	3
Setup PDF Generator	3
How to use PDF Generator	7
Uninstall - PDF Generator	8

Updated: May 11, 2017

Applies To: Dynamics 365, Dynamics CRM 2016 Online & On-Premise

Overview

Dynamics PDF Generator allows to view PDF document for the configured word templates and provides option to download or save to notes. CRM provides out-of-box word template feature and this tool is add on to allow the existing word templates to be generated as PDF format.

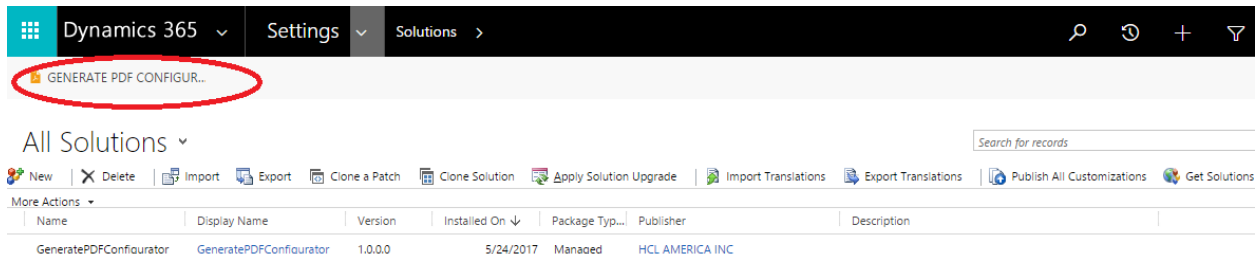
Features

- Configure the generate PDF for the entities having document templates.
- Provides option to choose templates to enable generate PDF feature.
- Allows configure/remove the generate PDF feature for an entity and template at any given point of time.
- Provides option to view PDF template and then allows to Save to Notes or Download.
- Logs all the transaction to view the configuration changes.
- Automate the deployment process.

Setup PDF Generator

- After importing the solution a user with System Administrator/System Customizer will be able to view GeneratePDFConfigurator Solution in CRM

Navigate to Settings -> Solutions -> GeneratePDFConfigurator Solution as show below.



The screenshot shows the Dynamics 365 interface. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. A red circle highlights the 'GENERATE PDF CONFIGUR...' link in the left-hand navigation pane. Below this, the 'All Solutions' page is displayed, featuring a search bar and a table of solutions. The table has columns for Name, Display Name, Version, Installed On, Package Typ..., Publisher, and Description. A single solution is listed: GeneratePDFConfigurator, with a version of 1.0.0.0, installed on 5/24/2017, and published by HCL AMERICA INC.

Name	Display Name	Version	Installed On	Package Typ...	Publisher	Description
GeneratePDFConfigurator	GeneratePDFConfigurator	1.0.0.0	5/24/2017	Managed	HCL AMERICA INC	

- Click on “Generate PDF Configurator”, a new window will be opened with the list of entities which have document templates available in the system.

[Generate PDF can be configured only for the entities having templates. Create your own word templates to see here.](#)

Please select the entity from below to see the list of templates associated to it.

Entity:

Configured Entities

Entity	Template	Created On	Created By	Remove
--------	----------	------------	------------	--------

- Select the Entity name and list of document templates associated to the entity will be displayed in templates field.
- Select the template to be enabled for generate PDF

[Generate PDF can be configured only for the entities having templates. Create your own word templates to see here.](#)

Please select the entity from below to see the list of templates associated to it.

Entity:

Templates:

Configured Entities

Entity	Template	Created On	Created By	Remove
--------	----------	------------	------------	--------

Click Configure > you will get "Record configured successfully" message and updates the entry to configured entities table

Dynamics 365 - Generate PDF Configuration Record configured successfully ?

Generate PDF can be configured only for the entities having templates. Create your own word templates to see here.

Please select the entity from below to see the list of templates associated to it.

Entity:

Templates:

Configured Entities

Entity	Template	Created On	Created By	Remove
--------	----------	------------	------------	--------

Dynamics 365 - Generate PDF Configuration ?

Generate PDF can be configured only for the entities having templates. Create your own word templates to see here.

Please select the entity from below to see the list of templates associated to it.

Entity:

Templates:

Configured Entities

Entity	Template	Created On	Created By	Remove
Account	Account Summary	5/29/2017		<input type="button" value="Remove"/>

- Click on "Configure" button will add any entry to Generate PDF Configuration entity and enable the Generate PDF functionality for configured entity settings and displays "Generate PDF" button in the selected entity.
- Every settings configured will be stored in Generate PDF Configurator log in CRM instance for audit purpose.
- **Remove** – Select the record from "Configured Entities" table and select remove check box and Click Remove Button to delete Generate PDF Configuration for specific entity and template.

Dynamics 365 - Gene ?

This will remove selected configuration(S). Do you still want to proceed?

Generate PDF can be emplates to see here.

Please select the entity from below to see the list of templates associated to it.

Entity:

Templates:

Configured Entities

Entity	Template	Created On	Created By	Remove
Account	Account Summary	5/29/2017	PDF Configuration	<input checked="" type="checkbox"/>

Generate PDF can be configured only for the entities having templates. Create your own word templates to see here.

Please select the entity from below to see the list of templates associated to it.

Entity:

Templates:

Configured Entities

Entity	Template	Created On	Created By	Remove
--------	----------	------------	------------	--------

Record(s) deleted successfully

Generate PDF can be configured only for the entities having templates. Create your own word templates to see here.

Please select the entity from below to see the list of templates associated to it.

Entity:

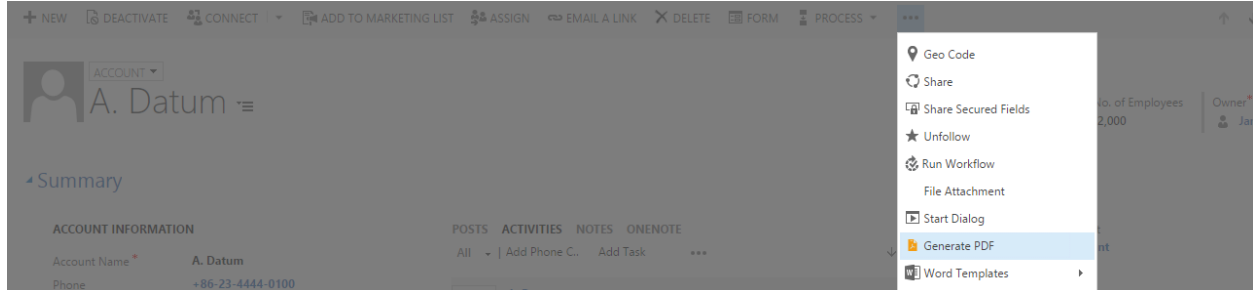
Templates:

Configured Entities

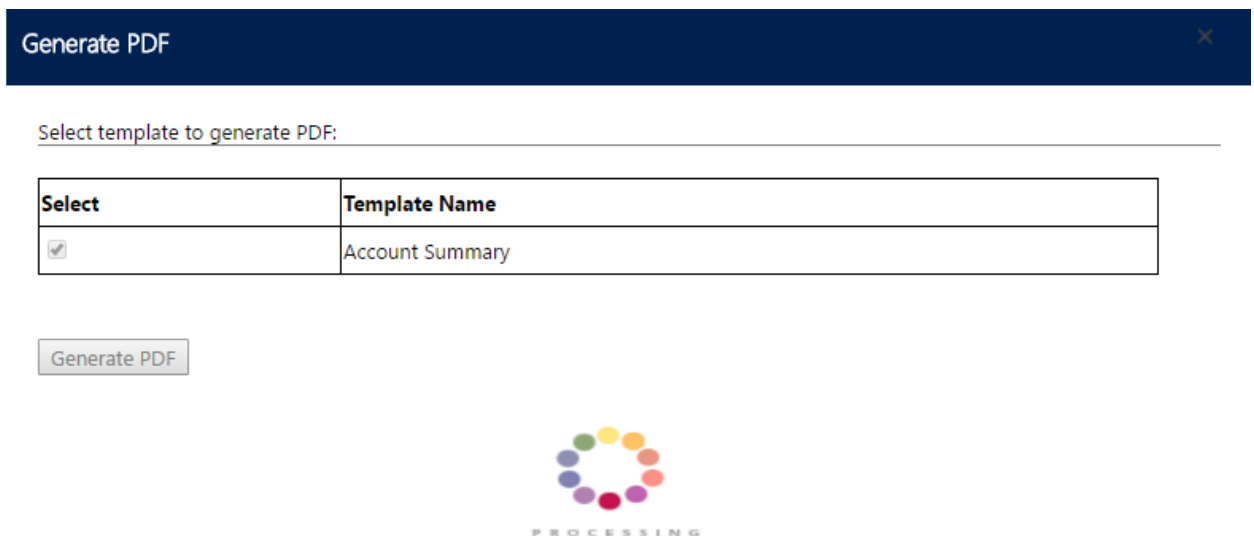
Entity	Template	Created On	Created By	Remove
Account	Account Summary	5/29/2017	PDF Configuration	<input checked="" type="checkbox"/>

How to use PDF Generator

- Submitting the Generate PDF Configurator settings will display "Generate PDF" button in the form ribbon of selected entity.



- Click on the "Generate PDF" button in the form ribbon, and it displays the popup to select the template to generate PDF.
- Select the template and click Generate PDF to view the PDF template



- View PDF and select either of the options - Save to Notes or Download
- Save to Notes will save the PDF template to Notes

Generate PDF

Select template to generate PDF:

Select	Template Name
<input checked="" type="checkbox"/>	Account Summary

Generate PDF



A. Datum
http://www.adatum.com
Phone: +86-23-4444-0100
Magui Lan
Guangzhou, Guangdong, 650031
Republic of China

ACCOUNT
Annual Revenue: 1000000000.0000
No. Employees: 12000
Parent Account:
Ticker: ADATU
INDUSTRY: Consumer Services
SIC Code:

This will attach Account Summary to notes. Do you want to proceed?

OK

Cancel

Generate PDF

Select template to generate PDF:

Select	Template Name
<input checked="" type="checkbox"/>	Account Summary

Generate PDF



A. Datum
http://www.adatum.com
Phone: +86-23-4444-0100



ACCOUNT
Annual Revenue: 1000000000.0000
No. Employees: 12000

Attached to notes successfully

Generate PDF OK

Select template to generate PDF:

Select	Template Name
<input checked="" type="checkbox"/>	Account Summary

Generate PDF  

<p>A. Datum http://www.adatum.com Phone: +86-23-4444-0100 Magui Lan Guangzhou, Guangdong, 650031 Republic of China</p>	<p>ACCOUNT Annual Revenue: 1000000000.0000 No. Employees: 12000 Parent Account: Ticker: ADATU INDUSTRY: Consumer Services SIC Code:</p>
--	--

- Download option will download the PDF template to local.

Uninstall - PDF Generator

Uninstall HCL Dynamics PDF Generator by deleting the solution from the Settings > Solutions list in CRM. Deleting the solution will delete all the configured settings and log records related to Generate PDF Configuration from your CRM system.