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Exsion Reporting

Installation manual ExsionBC

★ HB Software

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Introducing Exsion Reporting for Microsoft Dynamics 365 BC

Overview

Exsion Reporting Dynamics 365 Business Central (hereinafter referred to as: Exsion Reporting BC) is an extension for Excel that has been specially developed by HB Software. With Exsion reporting BC, Microsoft Dynamics 365 BC users can quickly and easily extract and present data. By combining the functionality and presentation power of Excel with a real-time link to reliable data from your administration, you can quickly request data for different companies and over different periods at any time.

With Exsion Reporting BC you are no longer dependent on the static reporting format of Dynamics 365 Business Central and you can prepare a report in a presentation format that you determine. The use of colors and graphics significantly increases the data presentation value.

If overviews have already been created in Excel in a certain form in which data is entered or copied again every period, these can easily be transferred to Exsion Reporting BC overviews by using the real-time link and being able to refresh the data with a single click.

In short: Exsion Reporting BC offers time savings, fast data extraction, flexibility, and user-friendly interface directly at Excel.

In this installation manual, the CRONUS NL Demo environment is used as an example.

This Installation Manual is structured as follows:

- Step 1 Installing the Extension in Dynamics 365 BC Step 2 – Installing the Excel Add-in
- Step 3 Setting up the connection

Step 1 – Installing the Extension in Dynamics 365 BC

To download ExsionBC for dynamics 365 BC you can follow the steps below:

First open Business Central and then click in the top right corner on the loupe.

		Ð	Environment Exsion	Q	Q	ŝ	?
				2			
				~			
> Find entries	> Reports						
> New	Excel Reports						
> Payments							

Now search for "Extension marketplace":

Tell me what you want to do	2 ×
extention marketplace	
Go to Pages and Tasks	
> Extension Marketplace	Administration
Search for 'extention marketplace'	

⑦ Search Help

Didn't find what you were looking for? Try exploring pages or exploring reports

After this you click on "Extension Marketplace", this will open a pop-up screen that will allow you to search new applications. On the right corner you have the search bar, here you type in Exsion and click on the tile "Exsion Reporting in Excel".

AppSource Apps for Busines	ss Central		
Apps (0) Other apps \vee		exsion	Q
Search results for "exsion	u.	∱↓ Sort E	y: Best match
Showing 4 results in apps. <u>Clear searc</u>	h		
All results			
∢ :	♥ HB Vastgoed 365		
Exsion Reporting in Excel	HB Vastgoed 365		
HB Software	HB Software		
😂 Business Central	Business Central		
Exsion Reporting is an Excel based Reporting solution for Microsoft Dynamics 365 Business Central	Vastgoed projectontwikkeling is speciaal ontworpen voor en geoptimaliseerd door		
★ 5.0 (9 ratings)			

Now click on the icon and this will open the Exsion Reporting in Excel window. Here you click on "Free Trial."

		Πς,
AppSource Apps for B	usiness Central	i
< Apps		
Exsion Reporting	Exsion Reporting in Excel ☆ Save to my list HB Software *****5.0 (9) Free trial	
Free Trial	Overview Ratings + reviews Exsion Reporting is an Excel based Reporting solution for	
Products Dynamics 365 Business Central	Microsoft Dynamics 365 Business Central	
Publisher HB Software	What is Exsion Reporting?	

After entering your profile information, you can indicate that you agree to the terms and conditions by checking the box.

Then click on Continue.





Exsion Reporting By HB Software

This app requires some basic profile information. You have provided the information already so you're good to go! Edit

	I give Microsoft permission to use or share my account information so that the
	provider or Microsoft can contact me regarding this product and related products and
	Microsoft may share contact, usage, and transactional information for support, billing,
	and other transactional activities. I agree to the provider's terms of use and privacy
	policy and understand that the rights to use this product do not come from Microsoft,
	unless Microsoft is the provider. Use of AppSource is governed by separate terms and
	privacy.

You're signed in as @hbsoftware.nl).

Continue

Select the environment where the free trial version of Exsion Reporting BC should be installed and then click **Install**.

Select the desired language by clicking on the three dots right of the drop-down menu, as in the example below.

Click on **Install** to continue the installation and after that click on OK.

To view the completed installation.

- -Go to the search button at the right top.
- -type in extension.
- -Select Extension installation status.
- -Select the search symbol
- -Type in Exsion.
- -Status should be completed.

CRONUS NL Financièn 🤟 K	asbeheer Verkoop Verkoop Inkoop	 Instelling en extensies 	elligente cloud-inzichten u	=		
Begeleide instelling Handmatige inst	elling Serviceverbindingen Exte	nsies Werkstromen				18
Extensiles: Alle V Zoeken Bi	eheren Pagna					V O D X
Weergaven X Alle : Filter lijst op.,		Exsion Reporting				
	Monath Base Application v. 15.0.36626.38258	HEStbace Exton Reporting 10.43721.0	Moreath Intelligent Cloud Base v. 15.0.36560.0	Microsoft Late Payment Prediction 9. 15.0.38826.36875	Microsoft Sales and Inventory Forecast v. 15.0.14626.36675	Microuit System Application v: 15.0.36626.37536

Exsion Reporting

Step 2 – Installing the Add-In in Excel

2.1 Installation

The Exsion Reporting in Excel application is now downloaded on the Business central side. Now you need to download the application on the client side. To download the application, you go back to Business Central and click on the loupe in the top right corner and type "Exsion BC" in the search bar.

The installation procedure of Exsion Reporting BC is identical for all workstations/servers and consists of the following steps:

Tell me what you want to do	∠ ×
ExsionBC	
Go to Reports and Analysis	
ExsionBC - Info	Reports and Analysis
Search for 'ExsionBC'	
🔛 Search company data	
⑦ Search Help	

Didn't find what you were looking for? Try exploring pages or exploring reports

Now you click on "ExsionBC – Info" and this will open a new pop-up screen. Once this screen is opened you click on the "Download the Setup" link

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ExsionBC - Info							
Help							
Online Help		https://do	cs.exsion.n	l/exsionbc/en	/		
onine neip							
Excel Addin							
Excel Addin		https://doo	cs.exsion.n	l/download.a:	shx?type=exsi	onbc	

Once downloaded you can open it in your download folder or in the top right of your browser.

Now a message will appear that will ask you, if you allow the program to make any changes on your computer. Here you click "Yes". Now the installation wizard will ask you what language you want to install Exsion with. You have the option to download it in the following languages:

- Dutch
- English
- German
- French

When you have selected your preferred language, you click on "Ok"

Select S	etup Language	\times						
€ _{BC}	Select the language to use during the installation:							
	English	\sim						
	OK Cancel							

In the following window you click on "Next"

🔇 Setup - ExsionBC	- 🗆 🗙					
	Welcome to the ExsionBC Setup Wizard					
	This will install ExsionBC version 3.0 Build 45415 on your computer.					
	It is recommended that you close all other applications before continuing.					
	Click Next to continue, or Cancel to exit Setup.					
	Next > Cancel					

Now select the preferred folder to install the application.

Setup - ExsionBC	_		×
Select Destination Location Where should ExsionBC be installed?		Q	
Setup will install ExsionBC into the following folder.			
To continue, dick Next. If you would like to select a different folder,	click Br	owse.	
C: \Program Files \ExsionBC		Browse	
At least 31,4 MB of free disk space is required.			
< Back Next	t >	Can	icel

And click on "Next" and after that on "Install"

2.2 Activation

Exsion is now installed but it still needs to be activated, to do this you need to open Excel and click in the ribbon on "Exsion BC", now click on "Activate"

3	3	\$	6,		¢	(0	•	
Connection ~		Function definition		-		Help	Info	Activate	

This will open a new pop-screen where you click on the bottom right corner on "Request trial license"

ExsionBC - Activate			\times
Language EN	Feedback		
ExsionBC cannot be activated			
Place the license file in the following directory: C:\Program Files\ExsionBC\			
For more information you can contact:			
HB Software Tel. +31 (0)182 580411 E-mail office@hbsoftware.nl			
The Activation Wizard automatically contacts the licensing set connection.	rvers through your	Internet	:
If you are using a valid Product Key that has not already bee of installations, your product is activated immediately.	n used for the allow	wed num	ber
When activating, your product key, user name and e-mail ad to the server.	dress are encrypte	d and ser	nt
The confirmation ID is sent back to your computer to activate	e the product.		
HB Software is constantly working to further improve its prod	lucts.		
Therefore we collect meta-data about the use of ExsionBC.			
<<	Request trial licens	e	

Fill in all the information then	click "request".
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ExsionBC - Activ	ate			×
Language	EN		Feedback	~
Request trial lic	ense			
Companyname				
Name				
Telephone numb	ber			
Email				
	<<	1	Request	



ExsionBC - Activat	e			×
Language	EN		Feedback	~
Confirm email	2			
	<<		Activate	

Now you will get an email with your personal trial key. Copy the key and fill it in on the next window

Once you have filled in the key click on activate, the installation is now complete.

2.3 System and additional requirements

Below is an overview of compatible operating systems and Microsoft Office packages.

Operating system Exsion Reporting BC can be installed on the following operating systems:

- MS Windows Server 2008 /2012 / 2016
- MS Windows 7 / 8 / 8.1 / 10 / 11

Exsion Reporting BC is not supported on MacOS, Android and Windows ARM.

Office versions The following Office versions are supported by Exsion Reporting Business Central in both 32- and 64-bit

- MS Office 2007 / 2010 / 2013 / 2016 / 365 On Premise

Step 3 – Setting up a connection

To use Exsion Reporting BC, a connection between the Business central server and the user must be defined.

In the Exsion Reporting BC ribbon menu, click Connection.



Click on the drop-down menu on "New connection" then following window will appear:

ExsionBC - Connection		— 🗆 X
Name		
Туре	OAuth 2.0 (v2)	
User Name		
Web Service Access Key		
Language ID	English	Multi environment (beta) 🗍
SOAP URL		
Webdient-URL		
SelectLatestVersion		
TransactionType	Browse	
Download symbols		
Developer Service-URL		
OK Del	ete	OAuth 2.0 - Login Prompt 🗌

- Name: Here you fill in the name of the connection (Example; Exsion production)
- Type: Here you select your preferred connection type. (OAuth 2.0 is the most common)
- Username: This connection only needs to be filled in when you use "Windows"
- Web Service Access key: This connection only needs to be filled in when you use "Access key"
- Language ID: Here you select the language of the data that will be retrieved
- SOAP-URL: This needs to be filled in when using the connection OAuth 2.0
- Web client-URL: This needs to be filled in when you use the connection Windows and Access key to make use of the Show details function.

Select here oAuth 2.0. To find the Soap URL in Dynamics 365 Business Central click on the loupe and type in ExsionBC

Tell me what you want to do	2 ×
ExsionBC	
Go to Reports and Analysis	
E ExsionBC - Info	Reports and Analysis
Search for 'ExsionBC'	
Search company data	
⑦ Search Help	
Didn't find what you were looking for? Try exploring pag	es or exploring reports

Open the "Connection" menu and copy the SOAP-URL.

	Ø	Ŀ	+	Ē		[] []
ExsionBC - Info							
Help							
Online Help · · · · · · · · · · · · · · · · · · ·		https://doc	s.exsion.nl	/exsionbc/en	/		
Excel Addin							
Download the Setup		https://doc	s.exsion.nl	/download.as	hx?type=exsior	nbc	
Download the Setup							
Connection							



Paste the SOAP-URL in the bar SOAP-URL.

ExsionBC - Connection	- D X
Name	Exsion Production
Туре	OAuth 2.0 (v2)
User Name	
Web Service Access Key	
Language ID	Nederlands Multi environment (beta)
SOAP URL	https://api.businesscentral.dynamics.com/v2.0/xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
Webclient-URL	
SelectLatestVersion	
TransactionType	Browse
Download symbols	
Developer Service-URL	
OK Dele	te OAuth 2.0 - Login Prompt

Now click OK, then the Office 365 login window appears, and you must log on with your own credentials.

IMPORTANT: The first time you make a connection an Admin account needs to log in to accept the terms and conditions.

ExsionBC is now set up and ready for use.

Enjoy your Free Trial!

Help and support

If you need help or have questions, please do not hesitate to contact us:

• support@hbsoftware.nl

Feedback

We value your feedback and would like to hear it from you! Rate and Review Exsion Reporting BC at: <u>HBSoftware - Exsion BC - Rate and Review</u>