

 **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.



- > Find entries...
- > New
- > Payments
- > Reports
- 📄 Excel Reports

Now search for "Extension marketplace":


Tell me what you want to do ↗ ✕


extension marketplace

Go to Pages and Tasks

[> Extension Marketplace](#) Administration

Search for 'extention marketplace'

 [Search company data](#)

 [Search Help](#)

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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 Business Central

Apps (0) Other apps ▾ exsion 🔍

Search results for "exsion" ↕ Sort By: Best match ▾


Showing 4 results in apps. [Clear search](#)

All results



Exsion Reporting in Excel


HB Software

 Business Central

Exsion Reporting is an Excel based Reporting solution for Microsoft Dynamics 365 Business Central


★ 5.0 (9 ratings)

Free trial ☆



HB Vastgoed 365

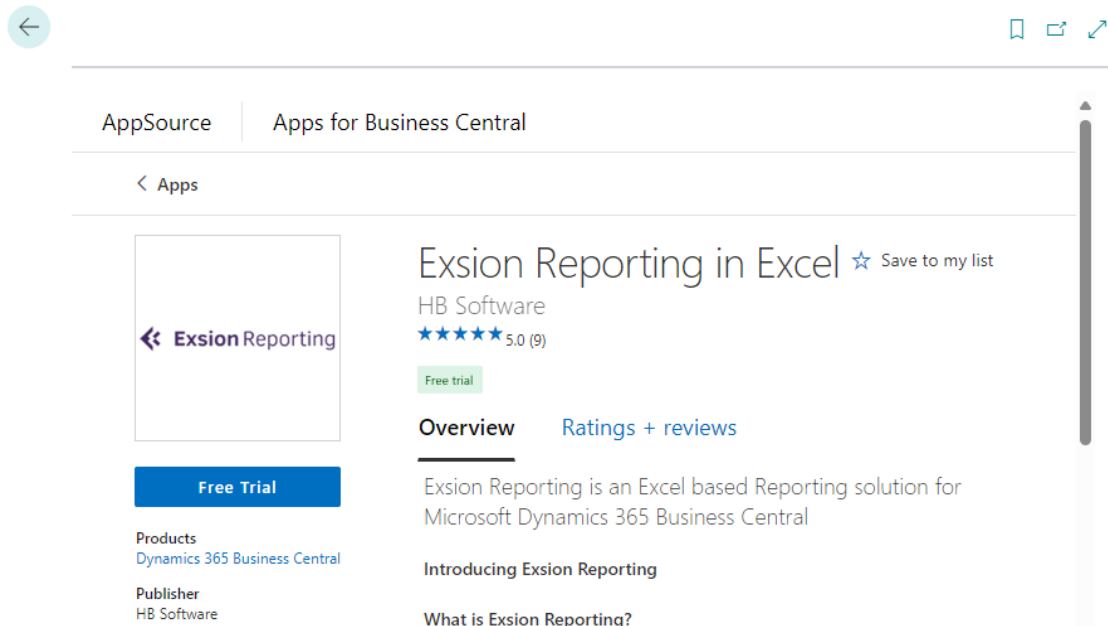
HB Software

 Business Central

Vastgoed projectontwikkeling is speciaal ontworpen voor en geoptimaliseerd door...

Free trial ☆

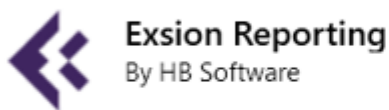
Now click on the icon and this will open the Exsion Reporting in Excel window. Here you click on "Free Trial."



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

Then click on Continue.

One more thing ...



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 [REDACTED]@hbsoftware.nl).

Continue

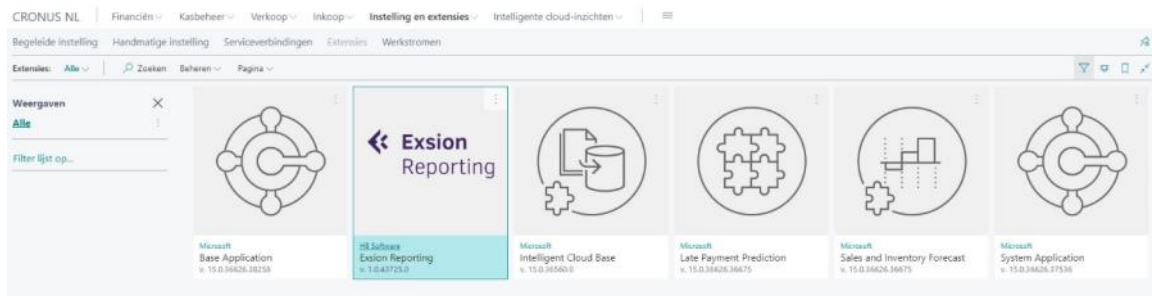
Select the environment where the free trial version of Exsion Reporting BC should be installed and then click **Install**.

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.



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

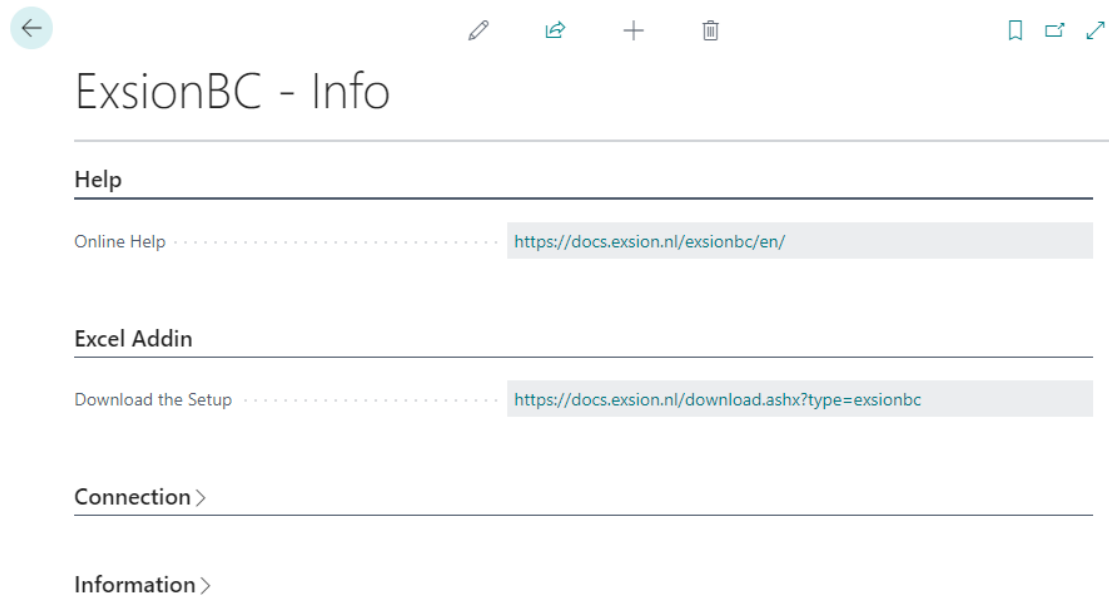
Search for 'ExsionBC'

 Search company data

 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

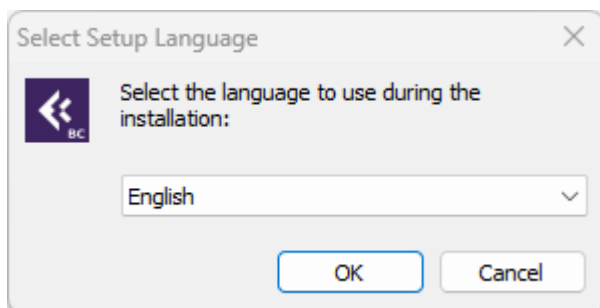


Once downloaded you can open it in your download folder or in the top right of your browser.

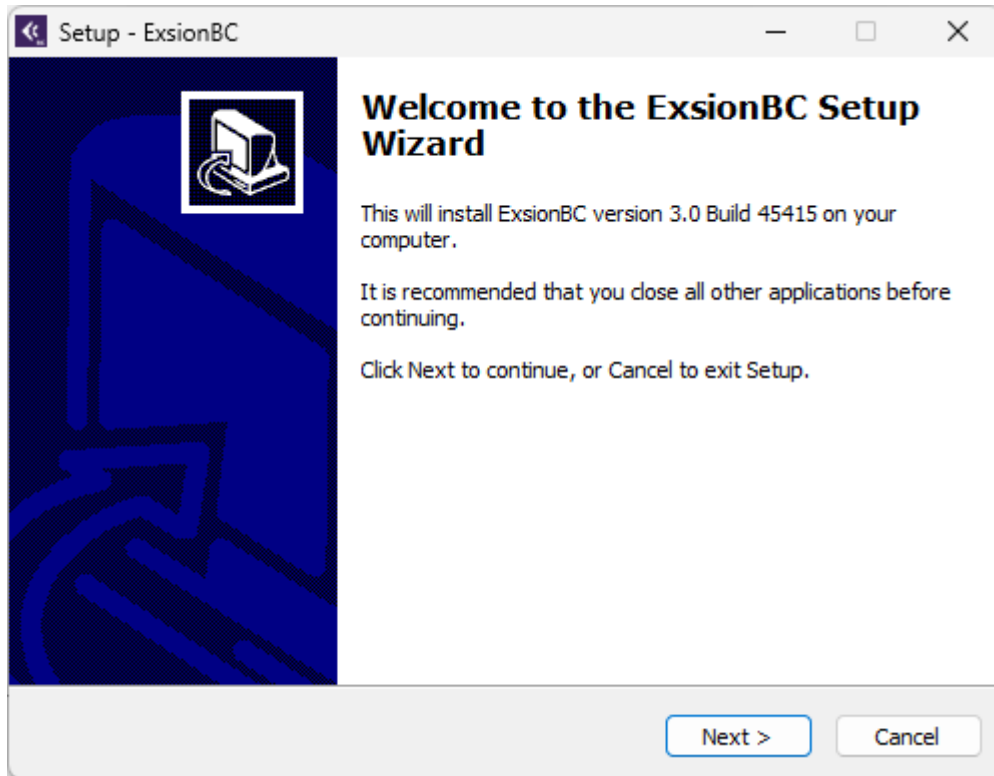
Now a message will appear that will ask you, if you allow the program to make any changes on your computer. Here you click “Yes”. Now the installation wizard will ask you what language you want to install Exsion with. You have the option to download it in the following languages:

- Dutch
- English
- German
- French

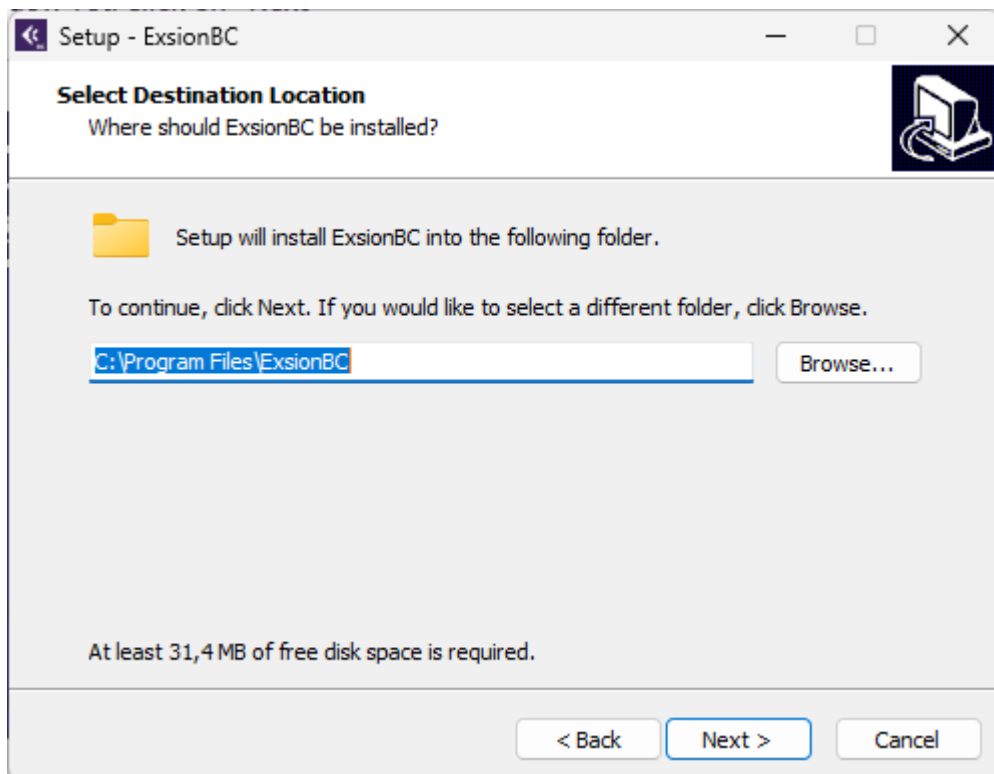
When you have selected your preferred language, you click on “Ok”



In the following window you click on "Next"



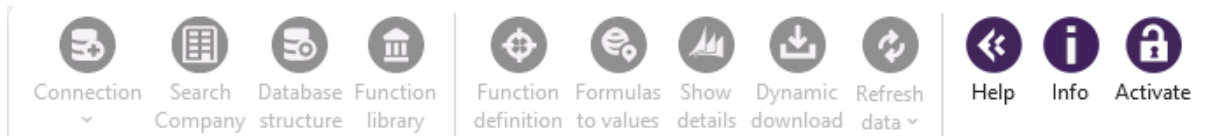
Now select the preferred folder to install the application.



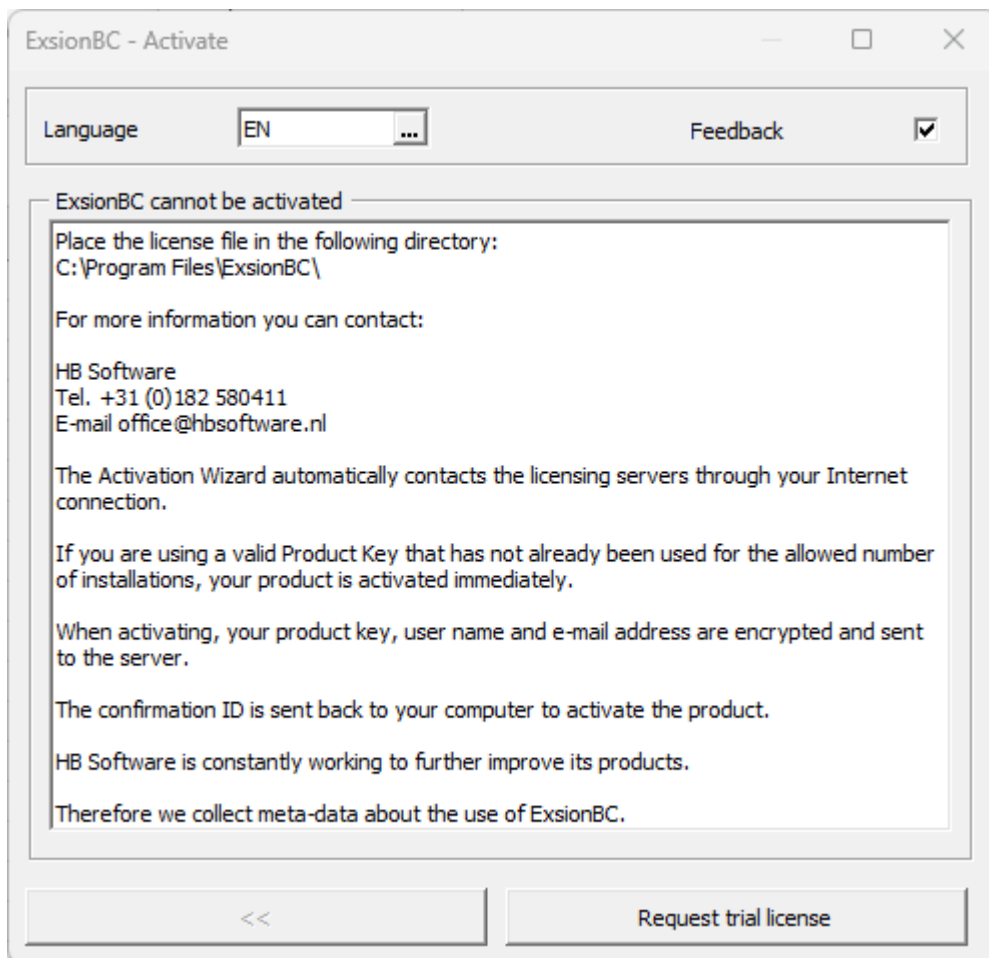
And click on "Next" and after that on "Install"

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"



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



Fill in all the information then click "request".

ExsionBC - Activate

Language ...

Feedback

Request trial license

Companyname

Name

Telephone number

Email

<< Request

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:

- 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



ExsionBC

Go to Reports and Analysis

ExsionBC - Info

Reports and Analysis

Search for 'ExsionBC'

Search company data

Search Help

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

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

ExsionBC - Connection

Name: Exsion Production

Type: 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/xxxxxxxx-xxxx-xxxx-xxxxxxxx/Production/WS/CRONUS%20NL/Codeunit/ExsionBC

Webclient-URL:

SelectLatestVersion:

TransactionType: Browse

Download symbols:

Developer Service-URL:

OK Delete

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:
[HBSoftware - Exsion BC - Rate and Review](#)