

Created by MyCRM Ltd

MyPDFCreator 365

Overview Guide

REF – MyPDFCreator 365.Overview.pdf

About This Overview Guide

The purpose of this guide is to give a high-level overview of MyPDFCreator 365 and what functionality it delivers to significantly enhance Microsoft Dynamics 365, or when on premise or Partner Hosted, Microsoft Dynamics CRM 2016.

Installation

Please refer to the separate MyPDFCreator 365 Installation and Configuration Guide for instructions. This overview guide assumes that MyPDFCreator 365 has been installed.

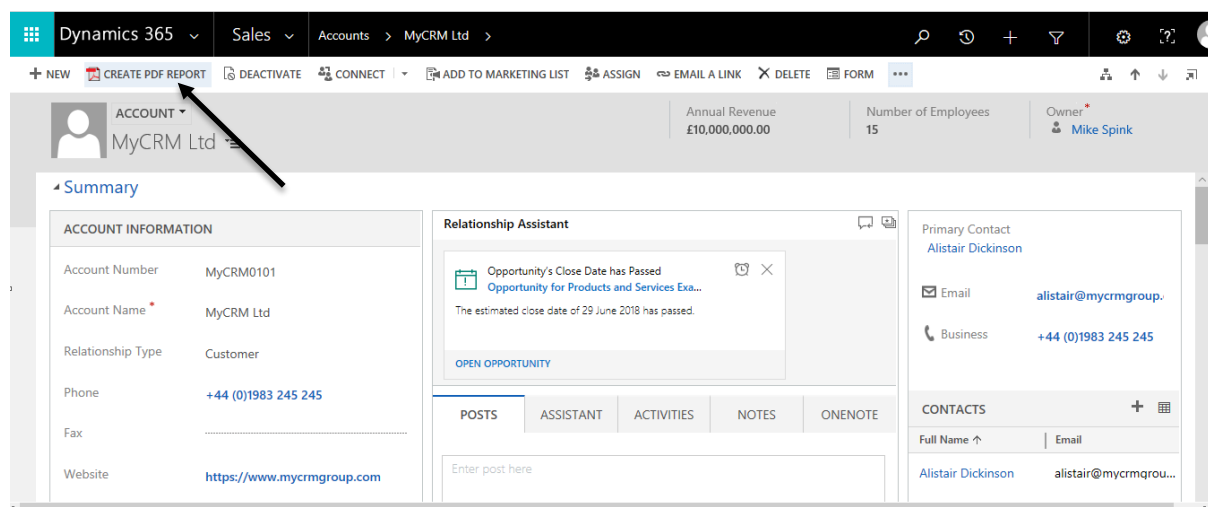
MyPDFCreator 365 for Microsoft Dynamics 365


The MyCRM MyPDFCreator 365 application is a productivity enhancement solution for Microsoft Dynamics 365. The latest version of MyPDFCreator 365 also works with CRM v2016 installations that are On-Premise or Partner Hosted.

MyPDFCreator 365 enables an end user to quickly run and create a PDF report directly from a number of record types in CRM.

Significant Productivity Gains

MyPDFCreator 365 provides significant productivity gains by reducing the time it takes to run Dynamics 365 reports and send to a recipient or number of recipients. With MyPDFCreator users can produce and email a report in seconds using just 2 mouse clicks. This compares favourably to the many multiple mouse clicks required to conduct the same process using Dynamics 365 standard procedures. By reducing the duration needed to produce and send reports, MyPDFCreator 365 helps to free up any user's time to allow them to do more meaningful activities that require more attention. Thankfully sending reports is no longer a laborious task.




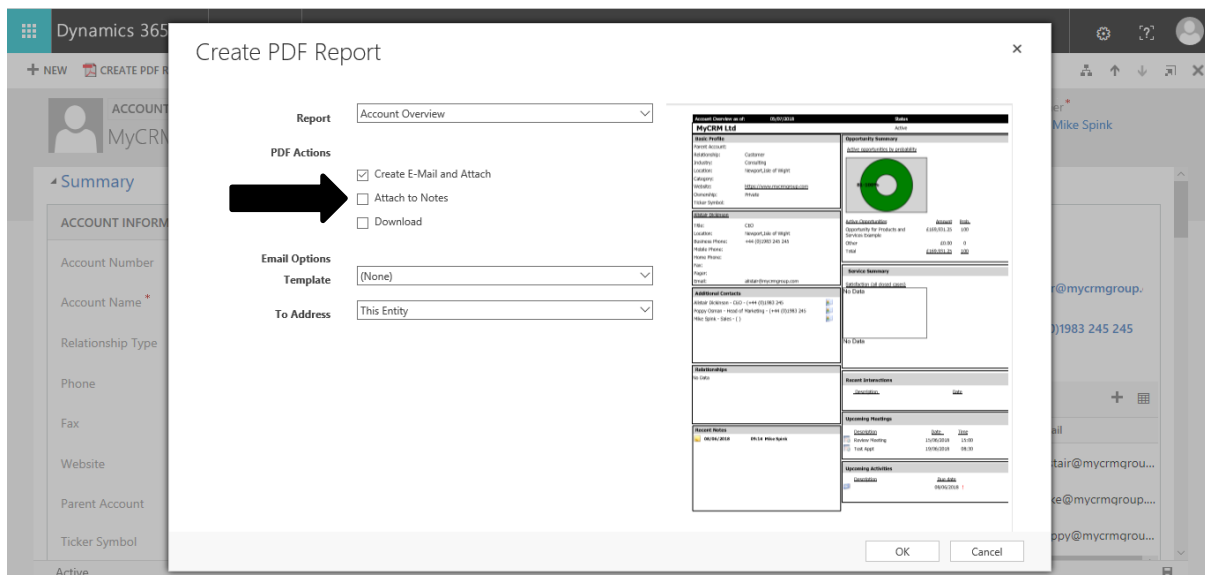
With MyPDFCreator 365 you can easily create a Quote, Order, Invoice, Account, Contact, Service Activity, Contract or Lead activity reports by clicking the  CREATE PDF REPORT button (as shown above).

Each time a report is created you have the option to either save locally, create a Dynamics 365 email activity with the report as an attachment or just save the report directly in the notes field of the related entity. MyPDFCreator 365 can also be added to custom or other standard entities within Dynamics 365.

Creating your Report

To create a PDF report all you need to do is select one of the 8 record types that supports the new functionality, these are; Account, Contact, Lead, Quote, Order, Invoice, Contract and Service Activity.

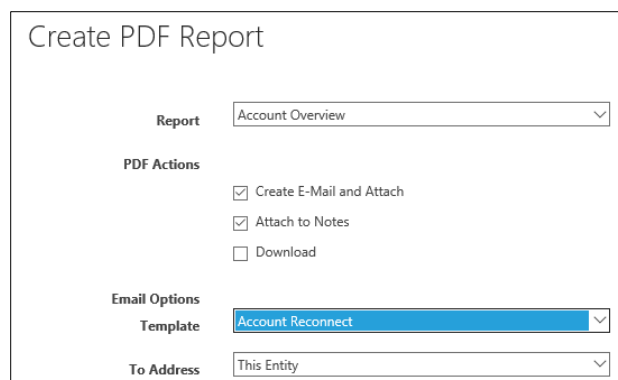
Open the record and select the  CREATE PDF REPORT button from the main tool bar this will load a selection window so a report type can be picked.



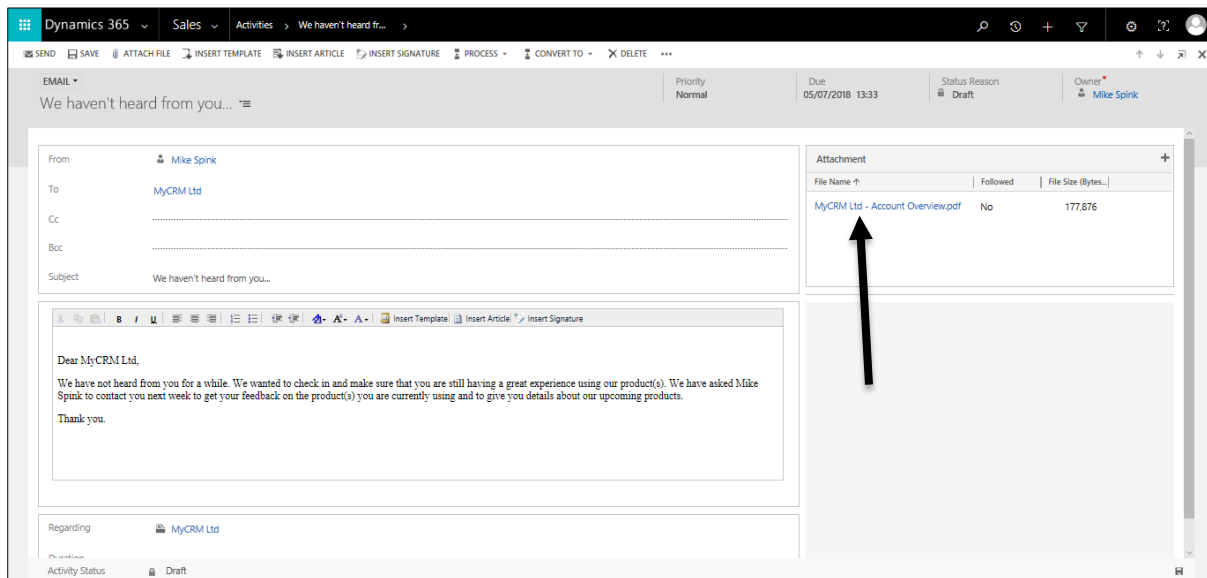
From the pop-up window that is displayed you can select any of the associated reports for the selected record type. It should be noted that to add MyPDFCreator 365 to custom or other entities, a separate simple setup is required.

You also have the option to save the PDF report locally and add an appropriate filename, or attach the newly created report to the entity notes as an attachment.

MyPDFCreator 365 offers additional flexibility and productivity enhancement to end users that don't want to have to run a report, then export, then save to the desktop, then create an email in CRM. With MyPDFCreator 365 one click will replace all of these steps and create a related email for the record and save the attachment.



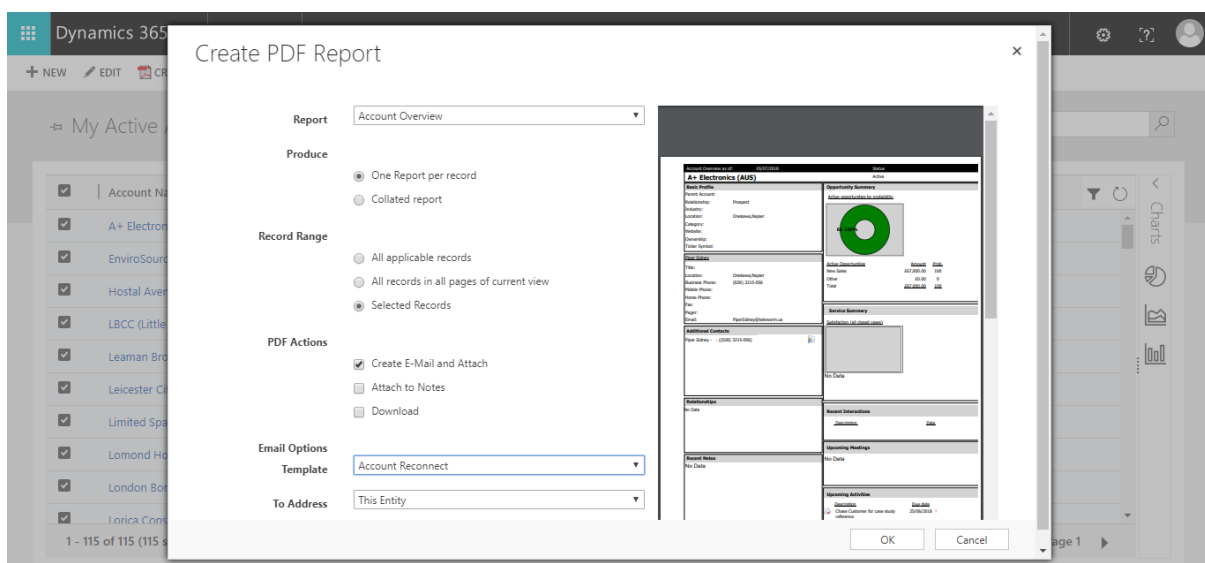
Seen below is the result of one mouse click. Now all any user has to do is check the email content (or write it if not using an email template) and then simply click send. The email is sent and the activity is recorded in Dynamics 365 in the standard way along with the attachment containing the report.



Bulk Report Sending – Even Greater Productivity

The bulk sending of reports presents an even more significant productivity gain when making use of MyPDFCreator 365, as users can simply select multiple Dynamics CRM records and then once again just hit the 'Create PDF Report' button. This then presents the following screen (below) which provides the previous options with the addition of being able to produce one report per record or send as a collated report. In the example we have selected 115 Account records who will all receive an email with their applicable Account Overview attached.

MyPDFCreator 365 will process all of the sending with every attachment being saved under the email activity. Users can execute multiple report production and either email, attach to notes, or download reports with just 2 simple mouse clicks.



MyPDFCreator 365 Greatest Benefits:

- **Productivity Gain 1** – saves time by reducing mouse clicks/time needed to generate reports
- **Productivity Gain 2** – quick and simple to email, attach to notes or download reports
- **Productivity Gain 3** – produce and send relevant reports to multiple recipients in seconds
- **Essential Usage Gain** – so easy and simple to use, Dynamics 365 users will WANT to use it!

Other MyCRM Enhancement Product Solutions

MyCRM offer a great many other productivity enhancements for Microsoft Dynamics 365, with each product solution delivering an array of key functional areas of improvement. Our product solutions deliver great value to businesses using Dynamics 365, with each product focused on delivering the all-important, great end user experience.

You can refer to other MyPDFCreator 365 documentation or the full user guide from the MyCRM Download Centre.

For Additional Information

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