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ePDF 2011—Productivity Enhancement

The MyCRM ePDF application is a productivity enhancement solution for Microsoft CRM 2011. The latest version of ePDF works with CRM installations that are On-Premise, Partner Hosted or with the latest Microsoft Online Offering.

ePDF enables an end user to quickly run and create a PDF report directly from a number of record types in CRM 2011.

Microsoft Dynamics CRM			Jez H 🥹
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Save	Collaborate	Process Data	
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Preferences Related Common More Addresses	General Account Name* Advanced Components (s		555-0135

With ePDF you can easily create a Quote, Order, Invoice, Account, Contact, Service Activity, Contract or Lead activity report by clicking the PDF report button

Each time a report is created you have the option to either save locally or create a CRM email activity with an attachment or just save the report directly in the notes field of the related entity.

For Additional Information

Contact :Alistair DickinsonEmail :sales@mycrmgroup.comPhone :01983 245245Web :www.mycrmgroup.com



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

Account: Advanced Component	s (sample) - Microsoft Dynamics CRM - Windows Inte	rnet Explorer 🥌	-	
https://mycrm.crm4.dynamics	com/main.aspx?etc=1&textraqs=%3f_gridType%3d1%	26etc%3d1%26id%3d%257bCF845D79-79CD-E011	-B80C-18A905730937%257d%26rsk	ey%3d606078431&p🌉ype= 🔒
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From the pop-up window you can select any of the associated reports for the selected record type, it should be noted to add ePDF to custom or other entities a separate setup is required.

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Create PDF Webpage Dialog		
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Create PDF Creates a PDF of the selected report.		
Report to Run Attachment Name	Account Overview Me Account Overview Attach PDF to Notes	
	Save PDF Create E-mail and Attach PDF	

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

ePDF 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 ePDF one click will do the trick.

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 ✓ Sales ² Opportunities ¹ Quotes ² Orders ² Invoices 	4 1 -1 of 1 (0 selected)			

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The advantage with ePDF is that it encourages users to stay within CRM and stops reports having to be saved locally every time before they can be attached

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And when the option is selected to create an email the ePDF document is automatically attached to the outbound email.

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