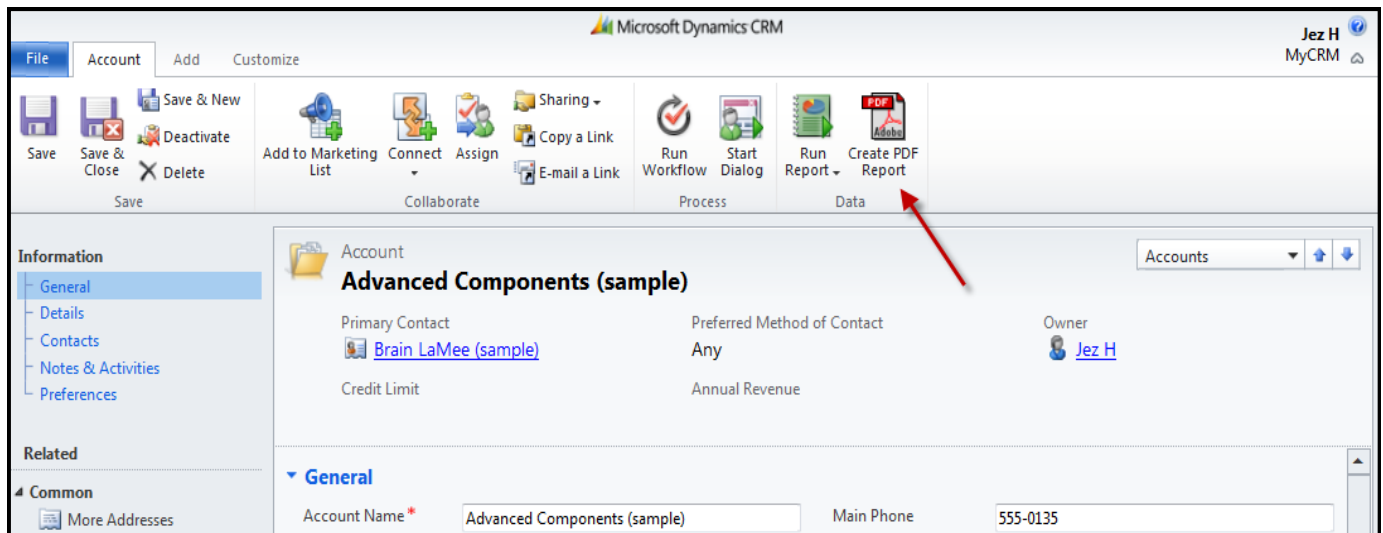


ePDF 2011

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.



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 Dickinson](#)

Email : sales@mycrmgroup.com

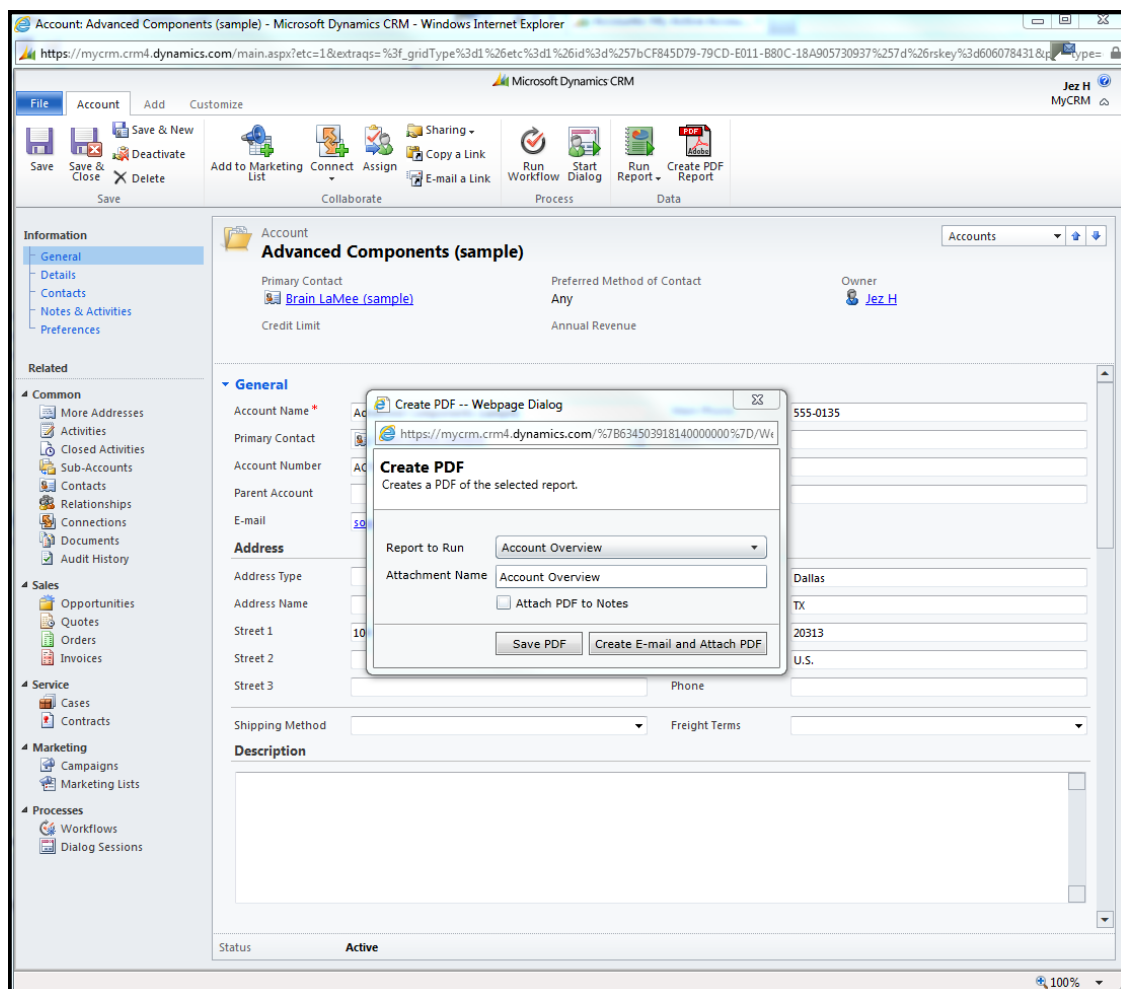
Phone : [01983 245245](tel:01983 245245)

Web : www.mycrmgroup.com

ePDF 2011

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.



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.

For Additional Information

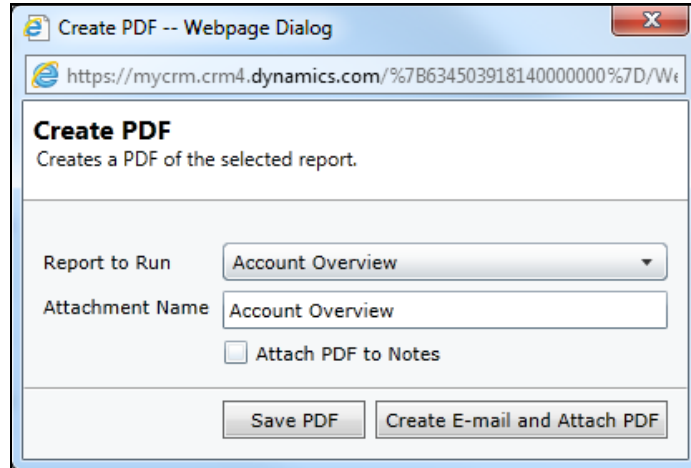
Contact : [Alistair Dickinson](#)

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Phone : [01983 245245](tel:01983245245)

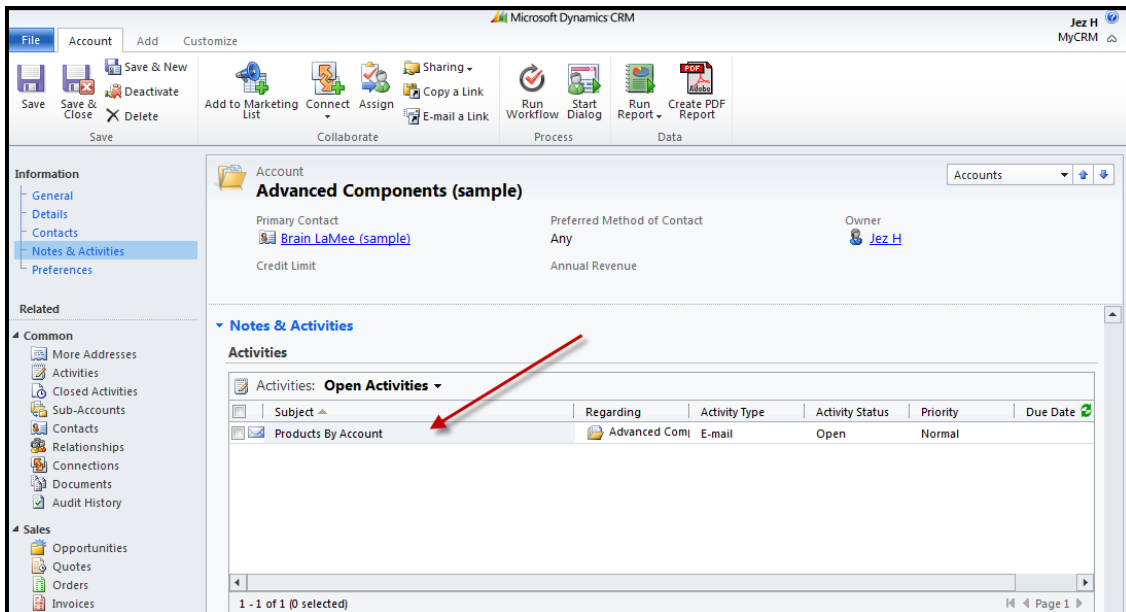
Web : www.mycrmgroup.com

ePDF 2011



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.

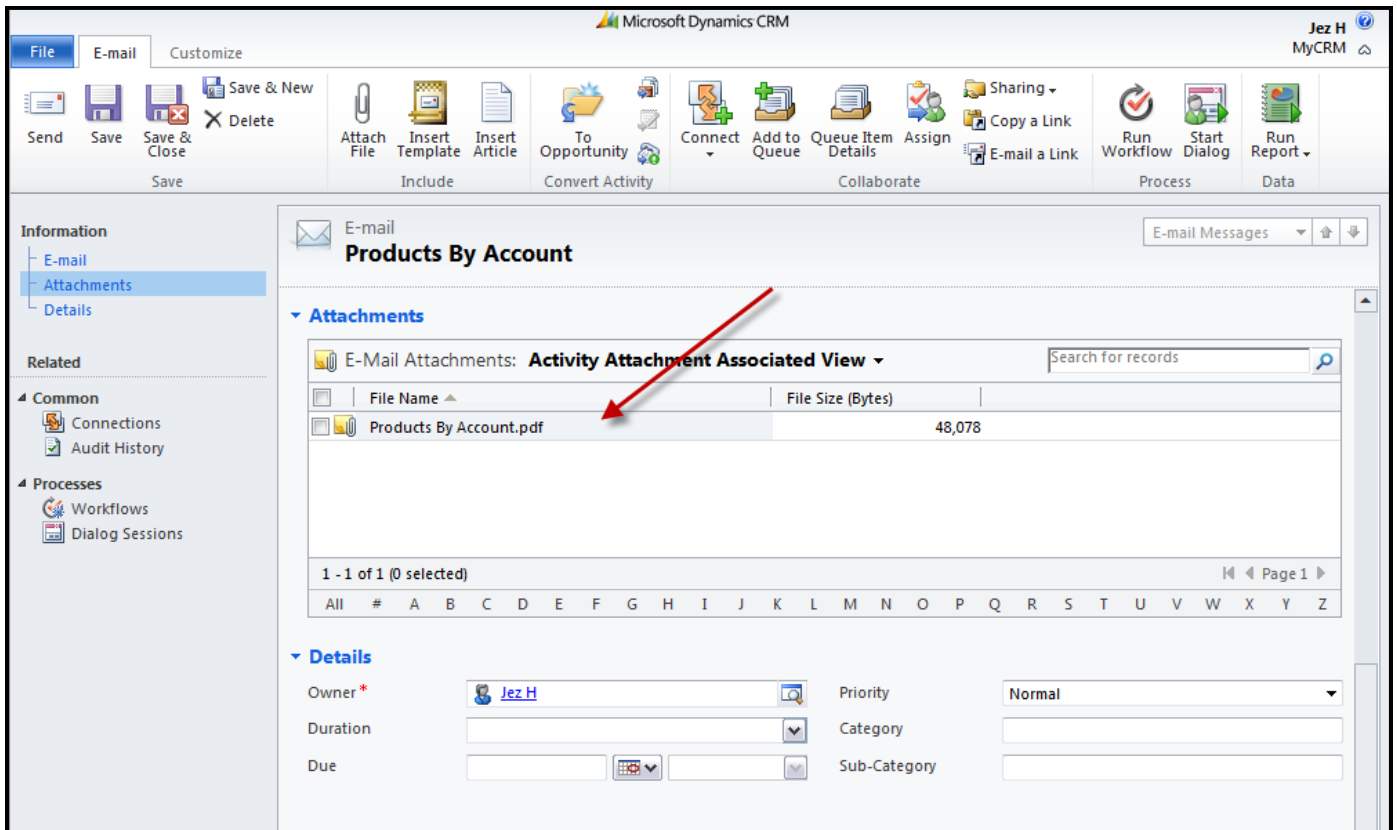


For Additional Information

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ePDF 2011

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



And when the option is selected to create an email the ePDF document is automatically attached to the out-bound email.

For Additional Information

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