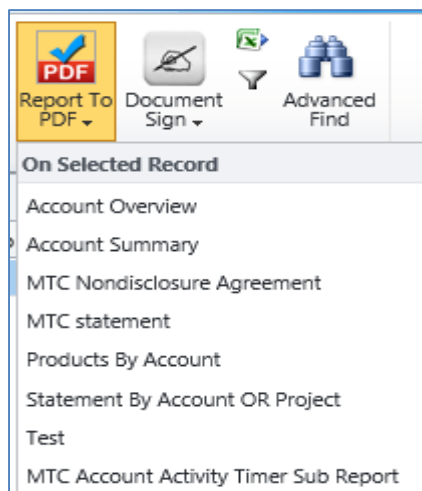# Report to PDF
For Microsoft Dynamics CRM

This CRM add-in to Microsoft's Dynamics CRM 2011, Microsoft Dynamics CRM 2013 (Orion) and CRM Online platforms adds the simple ability to Print-to-PDF very conveni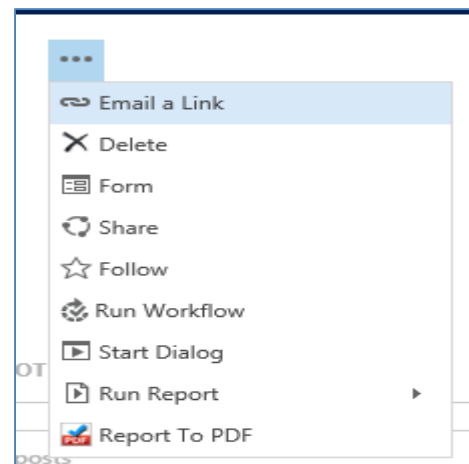ently. Any open CRM report document where ever you want it – Saved to disk, to a CRM email record as in "Attachments", Emailed with your template choice, or even to Microsoft Office Excel.

Report To PDF · Document Sign · Advanced Find

On Selected Record
- Account Overview
- Account Summary
- MTC Nondisclosure Agreement
- MTC statement
- Products By Account
- Statement By Account OR Project
- Test
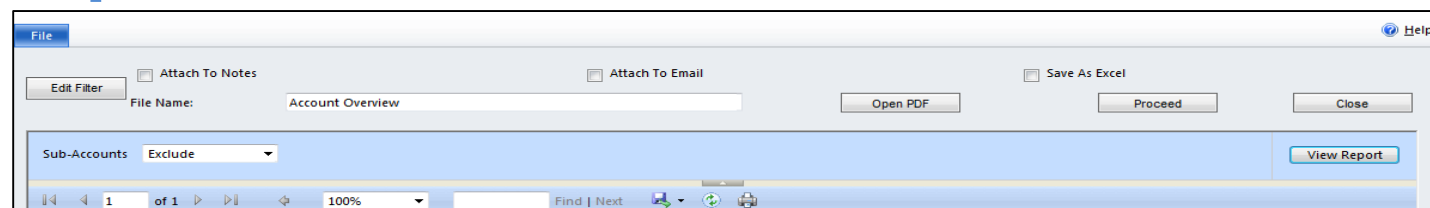- MTC Account Activity Timer Sub Report

Maintains set date range criteria and easy ability to produce the document more than one way at a time including printing – eliminating a Ribbon button.

Add Report-to-PDF to your CRM implementation processes easily for a 15-day trail and take the save-time challenge.

Ask MTC to build something best for you with the Report-to-PDF Microsoft Dynamics CRM Managed Solution.

- Email a Link
- Delete
- Form
- Share
- Follow
- Run Workflow
- Start Dialog
- Run Report
- Report To PDF

Report to PDF is one building block to a CRM process that saves time.

File				Help
Edit Filter	☐ Attach To Notes	☐ Attach To Email	☐ Save As Excel	
	File Name: Account Overview	Open PDF	Proceed	Close
Sub-Accounts Exclude ▼				View Report
◁ 1 of 1 ▷ ▷▷ 100% ▼ Find | Next				

Report to PDF Uses:

✓ Store reports, Quotes, Orders, Invoices or other documents in the PDF format on local or network drives
✓ Email documents to complete transactions, give instructions, provide periodic statements
✓ **Save, email, and print with only a few quick clicks . . .**

Report to PDF Feature Set:

✓ Open any CRM report document as a PDF and place or communicate in the way you want
✓ PDF Saved to disk from Browse
✓ PDF To a CRM email record as an "Attachment"
✓ PDF Emailed with your template choice
✓ Even to Microsoft Office Excel

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