



Sales PDF Productivity Pack for Microsoft Dynamics CRM 4.0.

Overview.

Sales PDF Productivity Pack is an integrated addin module that allows you to preview, save and email CRM Quote, Order and Invoice records:-

- Your sales team can save time
- You can review your document as it will be produced as a PDF
- You can save your document with configurable file names, make it easier to find the document
- You can create and send a CRM Email with the sales document attached automatically storing the email and attached quote in your customers history
- Automatic Email template population to ensure that all Quotes/Orders and Invoices have a related standard Email format applied to them to improve productivity and reduce typing errors for things such as T's&C's.
- SharePoint integration enhances the Sales PDF productivity Packs ability to quickly save quotes orders and invoices with standard naming conventions at a single click, with the ability to save them into a SharePoint document library with just a single mouse click.
- You can ensure that a clients history and audit trail are automatically maintained



CRM Versions supported.

Full support of all versions of MSCRM 4 (Workgroup/Professional and Enterprise), both 32 and 64 bit deployments.

Main Features of Sales PDF Productivity Pack.

The Sales PDF Productivity Pack delivers Sales Productivity for Microsoft Dynamics CRM (MS CRM), offering a single easy to use screen that will allow easy production of PDF documents from within a CRM Quote, CRM Order and CRM Invoice.



The Sales PDF Productivity Pack deliver delivers quick and easy access to sales documents and to increase productivity by reducing the number of steps required to produce and send a quote to a client :-

- See your sales document on the screen exactly as your customer would see it without having to run a report and export it to a PDF.
- Save time trying to work out how to name a saved sales document, through the configurable file naming options.



- Find your sales documents quickly and easily through the configurable direct save option.
- Keep track of all sales documents sent to a customer, by emailing from within Sales PDF Productivity Pack.
- Utilise the Power of SharePoint for document storage and management with just a single click place a copy of the document into a SharePoint document library.
- Utilise standard Email templates to ensure that your companies corporate image and terms are always present.
- Find documents sent to clients quickly and easily through the configurable direct subject option.

Trial Versions.

A free trial version is available for use with the Microsoft demonstration company 'Adventure Works Cycle', please send an email to info@crmaddins.co.uk requesting your trial for the demonstration company and we will contact you to get your trial set up.

30 day trails can be requested for use on your own system, please send an email to info@crmaddins.co.uk requesting your trial and we will contact you get your trial set up.

Pricing.

Sales PDF Productivity Pack for Microsoft Dynamics CRM 4 is priced in line with the MS CRM 4 server module that is in use and has no per user charges associated with it.

Microsoft Dynamics CRM 4 Server version	CRM Sales PDF Productivity Pack Cost*
Workgroup	£349.00
Professional	£499.00
Enterprise, first organisation	£549.00
Enterprise, second and subsequent organisations	£349.00

*Prices are exclusive of any sales or VAT taxes.

Software Assurance for Sales PDF Productivity Pack for Microsoft Dynamics CRM.

Sales PDF Productivity Pack software assurance is chargeable annually in advance and is charged at 20% of current list price of the version that is in use.

Partner program.

A partner program is available to all Microsoft partners who wish to resell CRM Addins products to their clients, please send enquiries to partners@crmaddins.co.uk, requesting more information on our Partner Program.

