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Take your Word templates to the next level!

DocumentsCorePack for Dynamics 365

DocumentsCorePack

Unified document solution for Dynamics 365



Generate

- MS Word based Templates
- PDF, DocX, HTML,
- Map fields from CRM
 - Standard & Custom entities & attributes,
 - multi-relation-support,
- OLE-DB connector



Process

- Email (generate attachments and email content)
- e-Signing (DocuSign, AssureSign)
- Save to SharePoint
- Print
- Attach as note or to letter
- **Preview & Edit**



Automate

- All document generation and processing options supported
- Advanced SharePoint integration
- Multipart documents
- **Scheduler**
 - Scheduled documents
 - Payment/Shipping confirmations

Wizard: One-Click Business Processes

Workflow integration



Helpful Links

- AppSource: [DocumentsCorePack on AppSource](#)
Solution Details: <http://www.mscrm-addons.com/Products/DocumentsCorePack>

Template Design

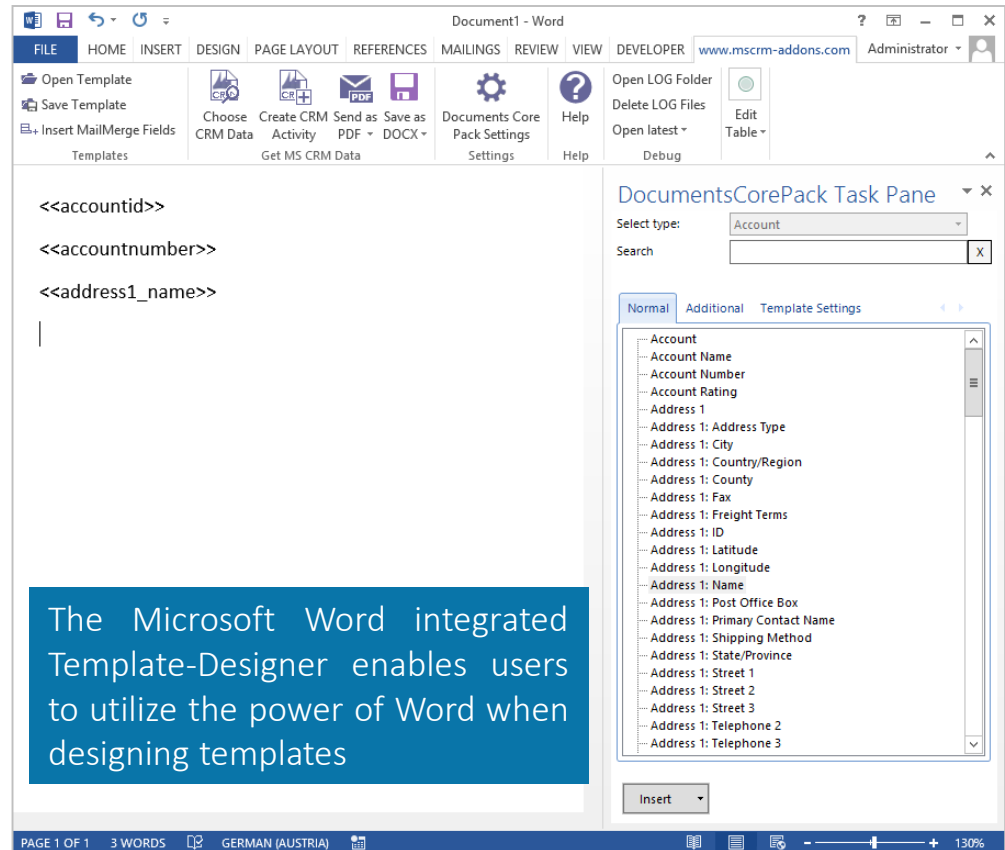
Microsoft Word based Template Designer

- Template Features

- All entities (standard and custom)
- All data-types supported
- Unlimited support for relationships
 - Multi-level

- Special-features:

- Embedding pictures (web or static)
- Embedding documents
- Embedding templates



The screenshot shows the Microsoft Word interface with the Template Designer ribbon active. The ribbon includes options like 'Open Template', 'Save Template', and 'Insert MailMerge Fields'. The main document area contains the following merge fields:

```
<<accountid>>  
<<accountnumber>>  
<<address1_name>>
```

The 'DocumentsCorePack Task Pane' is open on the right, showing a search box and a list of fields under the 'Normal' tab. The list includes:

- Account
- Account Name
- Account Number
- Account Rating
- Address 1
- Address 1: Address Type
- Address 1: City
- Address 1: Country/Region
- Address 1: County
- Address 1: Fax
- Address 1: Freight Terms
- Address 1: ID
- Address 1: Latitude
- Address 1: Longitude
- Address 1: Name
- Address 1: Post Office Box
- Address 1: Primary Contact Name
- Address 1: Shipping Method
- Address 1: State/Province
- Address 1: Street 1
- Address 1: Street 2
- Address 1: Street 3
- Address 1: Telephone 2
- Address 1: Telephone 3

An 'Insert' button is visible at the bottom of the task pane. A blue text box at the bottom of the screenshot reads: 'The Microsoft Word integrated Template-Designer enables users to utilize the power of Word when designing templates'.

Important Links

DocumentsCorePack vs. native document generation

Comparison Chart

Features	DocumentsCorePack	Native document generation
Microsoft Word Template Designer	✓	✓
Demo templates (ready to use)	✓	✗
Support for custom entities	✓	✓
Subcategorize templates	✓	✗
Related records	✓	✗
Relationship-types	✓	✓
many-to-one, one-to-many, many-to-many	✓	Limited to 1 level
Resolve multiple relationship levels	✓	✗
Elimination of blank lines for addresses	✓	✗
Filter related records	✓	✗
Sorting	✓	✗
Grouping and Totals	✓	✗
Define document names	✓	✗
Insert calculation	✓	✗
Insert conditions	✓	✓
Insert Pictures	✓	✗
E-Signature Integration (DocuSign, AssureSign)	✓	✗
Saved as note in Dynamics 365	✓	✓
Entity Images	✓	✓
Saved as web-path in Dynamics 365	✓	✗
Insert HTML	✓	✗
Insert QR Codes based on Dynamics 365 data	✓	✗
Insert dynamic hyperlinks	✓	✗
String manipulation	✓	✗
Field formatting	✓	✗
All CRM attribute types supported (money, datetime,...)	✓	✗
All Windows Cultures supported	✓	✗
Aggregation support	✓	✗
Connect to external database	✓	✗
Creation of label templates	✓	✗
Sub-template support	✓	✗
Easy generation of tables	✓	✗

Demo

Using the DocumentsCorePack Template Designer

Part 1: Embedding pictures

- o Web referenced pictures
- o Pictures stored in Dynamics 365 database (note, entity-images)

Part 2: Embedding documents

- o Static documents (e.g. product spec sheets)

Part 3: Embedding templates

- o Sub template into the current template

Thank you!


Support & Contact

- You can find us on the web at <http://www.mscrm-addons.com>
- Help-Center (Live-Chat, Support): <http://www.mscrm-addons.com/Support.aspx>
- Don't forget we have an awesome blog at <http://www.mscrm-addons.com/Blog>, you'll find it to be a helpful resource!

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