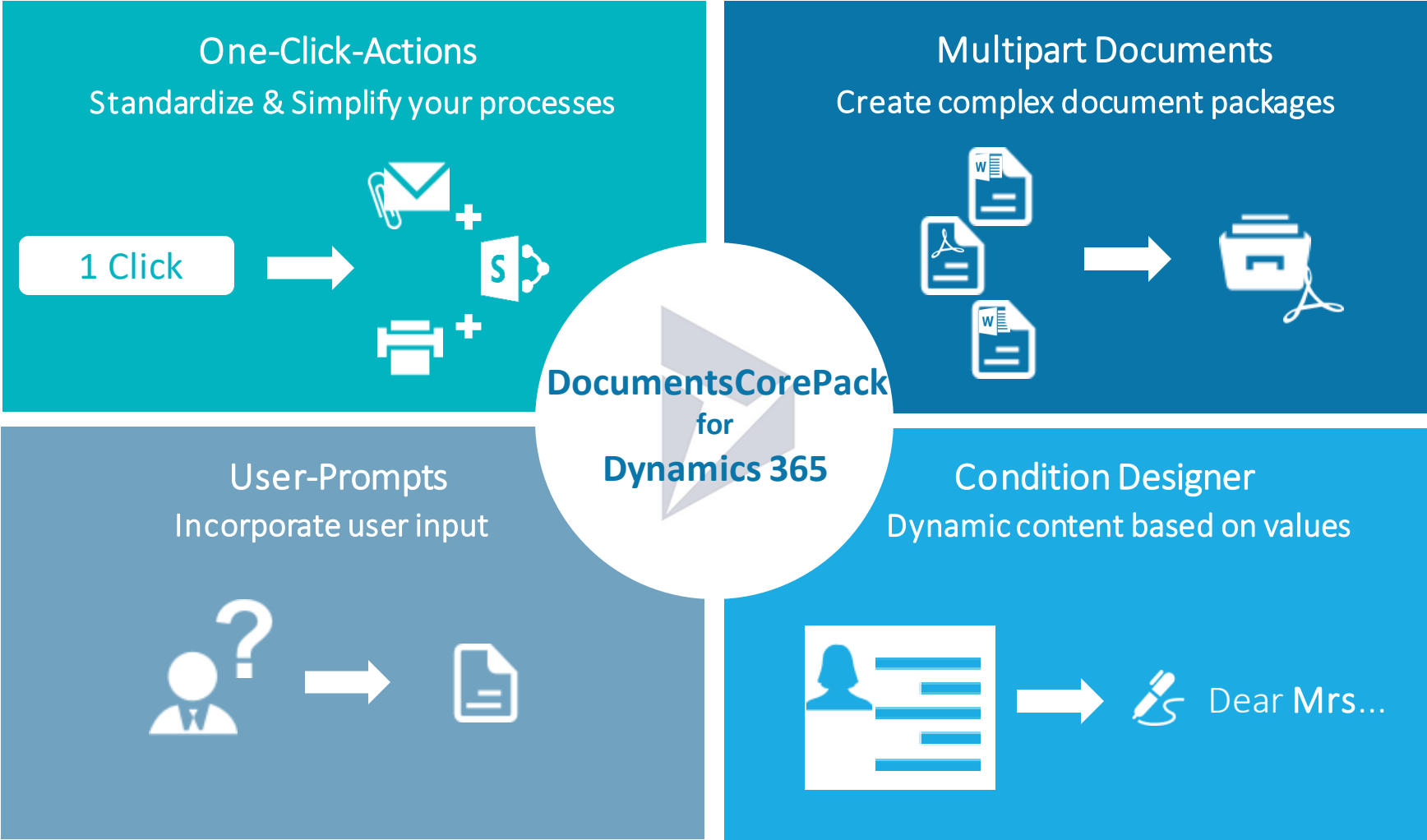




mscrm-addons.com
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Major Release of DocumentsCorePack
for Dynamics 365

Release Highlights



Free Trial: [DocumentsCorePack on Microsoft AppSource](#)
Product Details: [DocumentsCorePack Documentation Library](#)

One-Click-Actions: Preconfigure your processes



1. Template Selection

What document should be generated?

- User selection
- Predefine template
- Define Workbook



2. Define Processing

How to process the document upon generation?

- Print
- Send by email
- Send for e-Signing
- Save to SharePoint etc.
- ...





3. Review Options

Allow users to review/modify document before processing?

- Enable Preview
- Allow edit in Word



Send quote to customer  

create pdf, attach to email, print pdf, save to SharePoint

Multipart Documents: Generating Workbooks & Document packages



Goal: Generate document packages consisting of various elements

Sources:

- Templates
- SharePoint
- Note

Options:

- Include section
- Choose a version to be used
- Conditional inclusion

Template Selection Use Multi Part

Label	Type	Template / Note / SP URL	Description	Condition	Optional	Show
<input type="checkbox"/> Cover Letter	Template	Cover Page.docx	Cover Letter	+	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Company Profile	Template	Company Profile1.docx	Company Profile	+	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Resume	Template	Resume.docx	Resume Black	+	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Template	Resume Aqua.docx	Resume Aqua			



DocumentsCorePack Dialog

Generates a document based on the records data. [Click here](#) to see how to create templates

<input type="checkbox"/> Cover Letter	Cover Letter
<input checked="" type="checkbox"/> Company Profile	Company Profile
<input type="checkbox"/> Resume	Resume Black
<input type="checkbox"/> Quote	Quote - long version
<input type="checkbox"/> Terms and Conditions	Terms and Conditions
<input checked="" type="checkbox"/> Appendix	Appendix A

Next Cancel



Proposal

- Cover Letter
- Company Profile
- Quote - long
- Appendix A

User-Prompts: Incorporate user input into documents



Goal: Avoid the need for MS Word editing + standardize documents

Options:

- Show/Hide sections
- Add personal text to document
- Choose from predefined options

Examples:

- Personalized Notes
- Legal Verbiage
- Variations in Terms & Conditions

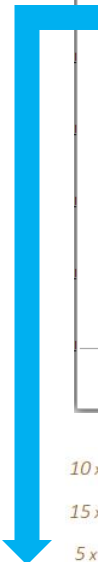
DocumentsCorePack Dialog
Generates a document based on the records data. [Click here](#) to see how to create templates

Show Validity?

Legal: * Paragraph2

Personal Note * Looking forward to meet you next week in our office. I will ensure that we have enough cookies this time :)

Next Cancel



10 x	Fabrikam Laptop15 M5000:	6.990,00 €
15 x	Fabrikam Laptop12 M2000:	15.000,00 €
5 x	WWI Desktop PC1.60 E1600:	3.750,00 €

Total: 46.087,00 €

This quote is valid for 30 days from today.

It would be a great pleasure to receive your order.
Looking forward to meet you next week in our office. I will ensure that we have enough cookies this time :)

Yours faithfully, John Snow

*\$2: Lorem ipsum dolor sit amet

Conditions: Dynamic content based on field values



Goal: Enable content to be displayed based on values inside Dynamics

Designer:

- “Advanced Find” like designer
 - And / Or
 - All Attribute types
- Re-Use conditions
- Automated else block

Examples:

- Salutation based on Gender
- Show Promo based on region

A screenshot of the 'Condition Field' dialog box. The 'Condition Name/Description' field contains 'Gender - Salutation' with '41 chars left'. The 'Relation' field contains 'document'. Under 'Conditional block (if statement)', 'Create else block' is unchecked, 'next to each other' is selected, and 'one below the other' is unselected. 'Use existing condition' is checked, and the dropdown shows 'Gender - Salutation'. 'Negate condition' is unchecked. The 'Designer' section shows a rule: 'Gender' equals 'Male'. There are 'OK' and 'Cancel' buttons at the bottom right.

Gender - Salutation
Dear Mr. Dixon
Name: Andrew Dixon

Video: [How to insert Condition Fields in DocumentsCorePack Template Designer](#)

Blog: [How to insert Condition Fields in DocumentsCorePack Template Designer](#)

Demo & Roadmap

Demo:

- One-Click Actions
- User-Prompts
- Multipart documents
- Conditions

Demo

It's not the end! – Work in progress:

- Custom activity support in Dialog ~ Q3
- Conditional Formatting ~ Q3
- Adobe e-Sign integration ~ Q4
- Visibility Rules for One-Click-Actions ~ Q4

Coming Soon

Thank you!

Support & Contact

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

Contact:



US:

+1 404 720 6066



support@msrm-addons.com



Europe:

+43 (316) 680 880



office@msrm-addons.com