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WEBINAR

"Processing generated documents"

Atlanta, 30/1/2014

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Predefining Values -Template Settings

- General Settings
- Additional Fields
- Document name / Subject
- Create activities for
- Email (Create CRM Activity)

DocumentsCorePack Task Pane ▾ ✕

Select type: Account ▾

Normal Additional **Template Settings** ◀ ▶

Document Name

Account
Account Name
Account Number
Account Rating
Address 1
Address 1: Address Type

<<name>> + ' Id:' + <<accountnumber>>

[Documentation](#) Apply

[Advanced Settings...](#)

General

Additional Fields

Document Name

Create Activities For

Email (Create CRM Activity)

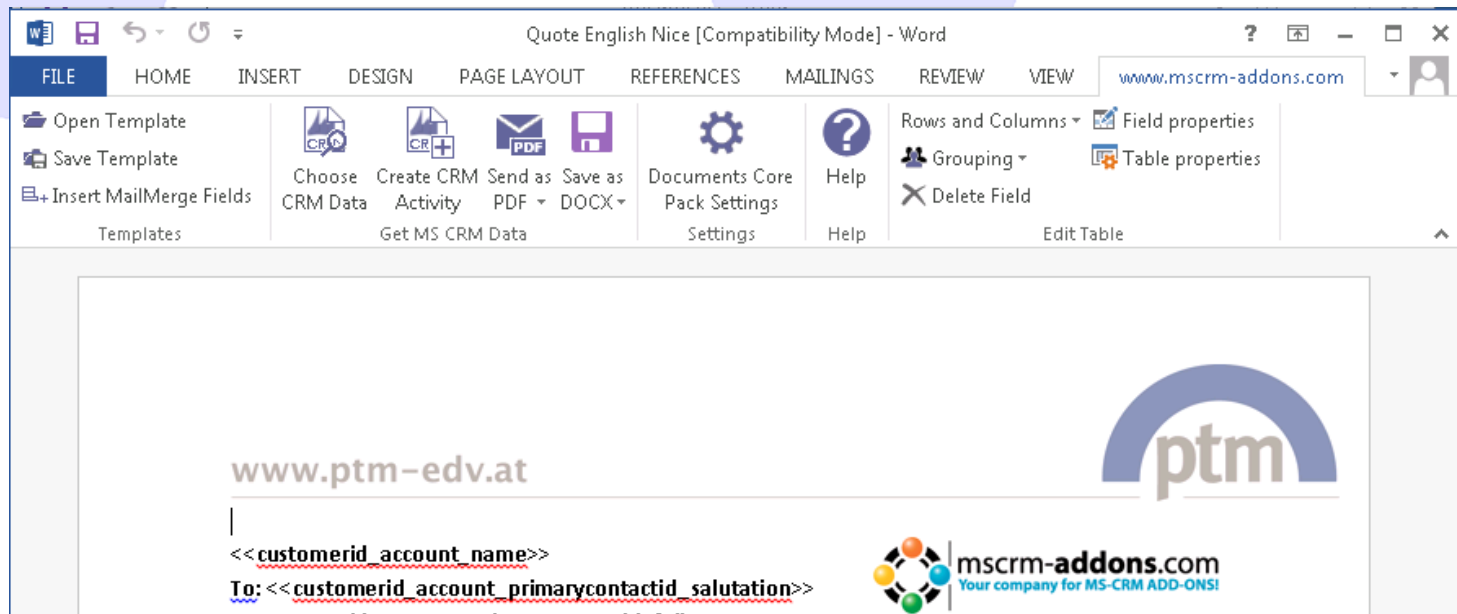
Processing documents within MS Word

Menu options:

- "Send As"
- Create CRM activity
- "Save As"

Advanced:

- Bulk-Merge
- Print documents
- Combine documents
- Create CRM activities



Processing documents using AutoMerge

- File-format
 - pdf, docx, html,..
- Attach document
 - as email or letter
 - as note
- Print document
- Save to SharePoint

AutoMerge

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

Filetype: pdf

Attach document: As email to the current record

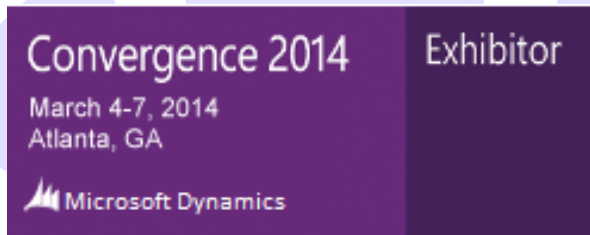
Email Recipient(s): Some Bikes & Computers (this record)

Print document: Canon 2020 Color

Save to SharePoint

Next Cancel

Thank You







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Resources:

- 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://blogs.mscrm-addons.com/>, you'll find it to be a helpful resource!

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Q&A

- If I do not get to your question due to time limitation expect an email from us with the answer!