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WEBINAR

"Getting Started with DocumentsCorePack for MS
CRM -

How to deploy and enable document generation in 20 minutes"

Atlanta, 7/14/2014

Clint Higley

Introduction to DocumentsCorePack for MS CRM 2013

- Values and benefits

- Templates based on MS Word
- Speed up document-related business operations. (quoting, invoicing, reporting, mailing, printing etc.)
- Automation inside Processes. (workflows, dialogs)

- Server-side component

- Reports, statements
- Quotes, invoices
- Mailing procedures

- Client component

- Template design
- Word-Integration for manual operations

- Getting Started:

- Web-installer for MS CRM Online
- MSI-installer for MS CRM On-Premise

Example: Installation & Configuration for MS CRM Online

> DocumentsCorePack Online Configuration (cloud service setup)

Hello mscrmaddonsguest Version 2013.5.5296.22552
Here you have the possibility to configure DocumentsCorePack for your CRM organization. Click [here](#) for a quick tour.

^ Your available CRM connection profiles

Name	CRM	Type	Organization Frie...	Organization Uni...	User
Contoso as admin@mscrma...	https://mscrmaddonsshowca...	Online - Office...	Contoso	mscrmaddonssho...	admin@mscrmaddon...

+

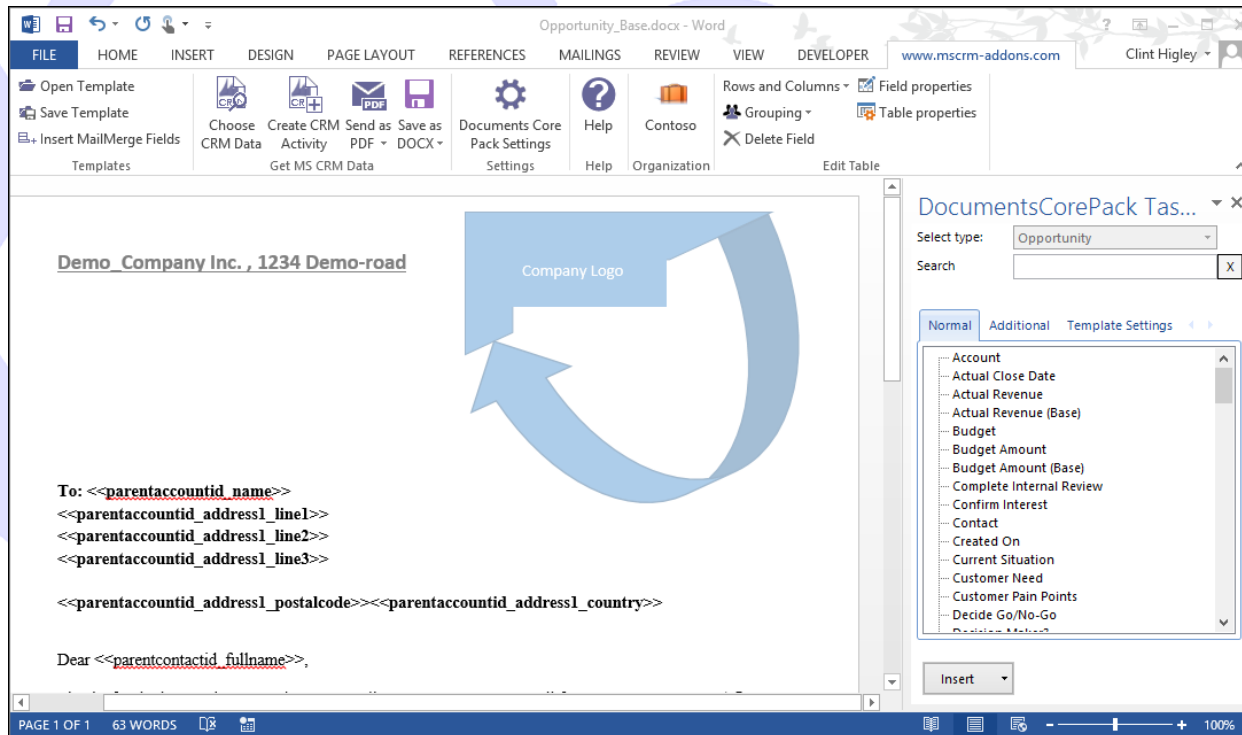
Your available service configurations

ID	Name	Status	Job Type	Batch Size	Data (thi...	Organization	CRM	Instance
22...	mscrmaddonsshowcase2	Running	Both	25	43.309 KB	Contoso	https://mscrmaddon...	https://aut...

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The DocumentsCorePack Template Designer

- Simple and powerful design of templates in MS Word



RoadMap

- Upcoming Features:

- eSignature

- Workbooks



Thank You

Feel free to join our upcoming Webinars!

<http://www.mscrm-addons.com/Support/Webinars.aspx>

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!