

WEBINAR- Outline

“Processing generated documents”

January 30, 2014
11am EST / 5pm GMT+1
25 minutes + Q&A

Outline

- Introduction to DocumentsCorePack for MS CRM & AutoMerge
- Processing options within MS Word:
 - Save locations
 - SharePoint
 - FileShare
 - Attach document to CRM record
 - Save as
 - docx,
 - pdf,...
 - Meeting business requirements
 - Send as PDF
 - Create CRM activity
 - Bulk-Merge behaviour
- Predefined settings
 - DocumentName / Subject
 - Create activities for
 - ...
- RoadMap
 - Upcoming improvements with respect to CRM 2013
- Questions & Answers

Information

Detailed information about DocumentsCorePack (trial-download, pricing) can be found on www.ms-crm-addons.com

If you have any questions, feel free to contact us:

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