

# WEBINAR- Outline

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## “Rich document generation based on CRM data”

December 12, 2013  
11am EST / 5pm GMT+1  
25 minutes + Q&A

### Outline

- Introduction to DocumentsCorePack for MS CRM
- Designing templates in MS Word:
  - Inserting CRM-fields into your document
  - Automated table creation for line-items (list of quote or invoice-products, list of contacts,...)
  - Additional features / Static fields
    - Insert documents
    - HTML
    - QR-codes
  - Field-switches (conditional fields)
- Step-by-Step creation of an invoice template
- 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](http://www.ms-crm-addons.com)

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

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