mscrm-addons.com
Your company for MS-CRM ADD-ONS!
Push the boundaries of Microsoft Dynamics 365 with our addons!

Product Catalog

Content

mscrm-addons.com
Your company for MS-CRM ADD-ONS!

Who we are

mscrm-addons.com is a Microsoft Gold Certified Partner, providing high-quality software solutions. We have specialized in developing add-ons for Microsoft Dynamics 365. When talking about Dynamics 365 in this brochure, we refer to the modules Sales, Customer Service, Field Service and Project Service Automation.

Why mscrm-addons.com?

We strive to develop products that are practical, easy to use and innovative. We aim to provide technical solutions that exactly meet our customer's needs. Our well trained, highly certified staff and our excellent knowledge of Microsoft technologies guarantee that we provide only the best solutions for our customers.

DocumentsCorePack (DCP)

Professional document generation, processing and automation

Document Generation & Processing - Your benefits at a glance:

Dialog : Generate and process documents in three steps
1. Select template
2. Define how to process document (see table on page 6)
3. Preview: Review and Edit

The **dialog can be customized according to your business requirements** supporting:
- **One-Click-Actions:** Preconfigure your document process to just one click and simplify the dialog for your use cases
  E.g. send pdf as an e-mail attachment, print and save to SharePoint with one click
- **Workbooks/Document packages:** Define complex documents consisting of several individual elements (e.g. proposals)
- **User-prompts:** Incorporate user-input into generated documents
- **Power Apps:** Using Microsoft Flow documents can be generated from your custom applications (Canvas Apps, Portals ...)

One-Click-Actions: Predefine your document operations like send quote as pdf and print.

3

Document Automation - Your benefits at a glance:

- **Dynamics 365 processes integration:** Automate your document processes via Dynamics 365 workflows or Microsoft Flow
- R**educing your user's workload and standardizing your internal and external documents**
- **Scheduled reports** (daily, weekly, monthly)

Use cases:
- Payment and shipping confirmation
- Send quote on activation
- Weekly service or sales report

> *We at Blanchard are very pleased with the product and would highly recommend mscrm-addons products to anyone looking for a robust yet flexible document merge and delivery solution.*
>
> *Ed Glover, Blanchard Company, Inc*

Dynamics 365 workflow

Microsoft Flow

DocumentsCorePack
Document generation service
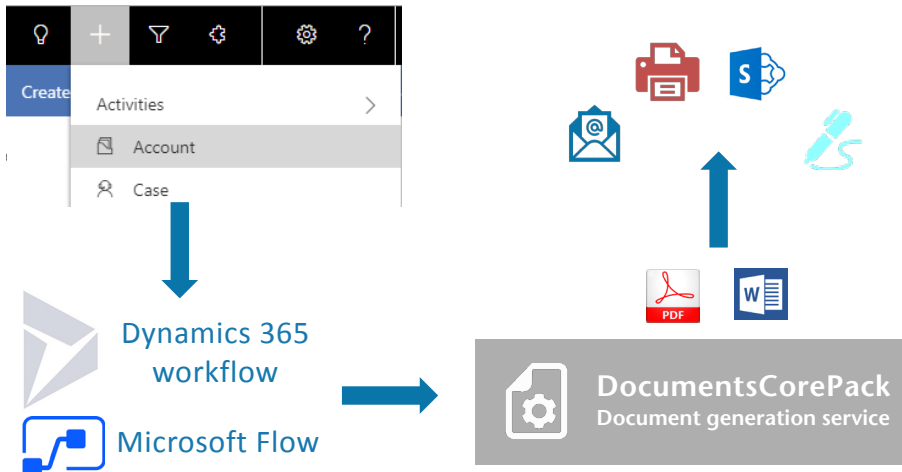
Template Design - Your benefits at a glance:

- **Microsoft Word based:** No design/feature limitations
- **Dynamics 365 connector:** Map any fields from Dynamics 365 or CDS (Common Data Service)
  - Unlimited support for relationships
  - All attribute types supported
- **Special features:** Embedding of pictures, sub-documents, e-Signature tags, HTML, QR-codes ...
  (See table on page 7)

Fields can be modified and thus, displayed in individual formats and various culture styles.

The Template Designer integrates into MS Word allowing users to design templates using Dynamics 365 data.
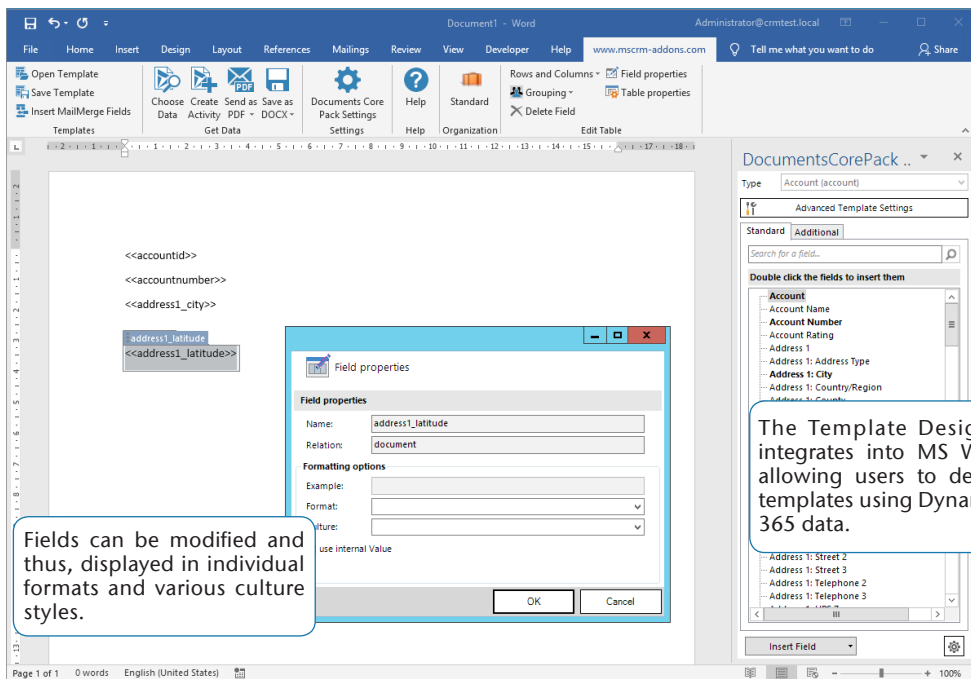
DocumentsCorePack is available for:
Microsoft CRM 2011, 2013, 2015, 2016 Online / On Premise / Hosted (IFD), Microsoft Dynamics 365

General Functionalities & Document Generation/Processing Comparison Chart

(DocumentsCorePack vs. Dynamics 365 (Native) Functionalities and Processing)

Features	DocumentsCorePack	Native document generation
Running on server	✓	✓
• as plugin	✓	
• as separate service	✓	
DocumentsCorePack Dialog	✓	✗
One click document generation	✓	✗
Create document in workflow	✓	✓
Create document with dynamic names	✓	✗
Supported file types	.docx, .pdf, .html, .txt ...	.docx
Generate activities (e.g. email with document attached)	✓	✗
Generate e-mail messages	✓	✗
e-Signature integration	✓	✗
Define Commands (e.g. Create document & send by e-mail...)	✓	✗
Secure your .pdf using a password	✓	✗
Advanced security settings for .pdf-files	✓	✗
Attach to e-mail	✓	✗
Run workflow	✓	✗
Save documents to SharePoint or local device	✓	✗
Create SharePoint locations	✓	✗
Write Metadata to SharePoint	✓	✗
Attach as note	✓	✓ Note located at primary record
Configurable save locations (SharePoint, fileshare)	✓	✗
Attach to letter	✓	✗
Print documents	✓	✗
• with Network printer	✓	✗
• with Google printer	✓	✗
Protect fillable .pdf form fields	✓	✗
Document Preview	✓	✗
Edit documents during document generation (for quick and easy mass mailings)	✓	✗
Batch processing from Dynamics 365 Grid	✓	✗
• Combine documents	✓	✗

Template Design Comparison Chart

(DCP Template Design vs. Dynamics 365 (Native) Document Generation)

Features	DocumentsCorePack	Native document generation
Microsoft Word Template Designer	✓	✓
Demo templates (ready to use)	✓	✗
Support for custom entities	✓	✓
Subcategorize templates	✓	✗
Related records	✓	✗
• Relationship-types many-to-one, one-to-many, many-to-many	✓	✓ limited to one level
Resolve multiple relationship levels	✓	✗
Elimination of blank lines for addresses	✓	✗
Filter related records	✓	✗
Sorting	✓	✗
Grouping and totals	✓	✗
Define document names	✓	✗
Insert Calculations	✓	✗
Insert Conditions	✓	✓
Insert Pictures	✓	✗
e-Signature Integration	✓	✗
Insert DocuSign	✓	✗
Insert AssureSign	✓	✗
Insert AdobeSign	✓	✗
Save as note in Dynamics 365	✓	✗
Entity Images	✓	✓
Save as web-path in Dynamics 365	✓	✗
Insert HTML	✓	✗
Insert QR-codes based on Dynamics 365 data	✓	✗
Insert dynamic hyperlinks	✓	✗
String manipulation	✓	✗
Field formatting	✓	✗
Aggregation support	✓	✗
Connect to external database	✓	✗
Creation of label templates	✓	✗
Sub-template support	✓	✗
Easy generation of tables	✓	✗
Template testing capabilities	✓	✗

AttachmentExtractor (AE)

Save money and Dynamics 365 data storage by moving e-mail attachments and notes

Your benefits at a glance:

- **Save money:** Reduce storage costs by moving documents to an alternative storage
  - Azure Blob Storage
  - SharePoint (Supporting Dynamics 365 document management settings)
- **Transparent:** No difference when accessing extracted documents for your users
- N**o SharePoint permissions** to access moved content required
- **Speed up migrations and upgrades**

Custom extraction rules:
- Touch **only e-mails related to certain entities (Whitelist) or block entities (Blacklist)**
- **Set up a scheduler to perform tasks** (e.g.: extract weekly, daily...)
- **Archive data** define extraction based on date/time values (older than X years)

> *AttachmentExtractor has saved us countless hours from dragging and dropping files into folders. And, by storing the files in SharePoint, it keeps monthly CRM costs to a minimum.*
>
> *Ken Kelly (CEO), Kelly Roofing*

AttachmentExtractor is available for:
Microsoft CRM 2011, 2013, 2015, 2016 Online / On Premise / Hosted (IFD), Microsoft Dynamics 365

ActivityTools (AT)

Add some Outlook-feeling to Microsoft Dynamics 365 activities

Your benefits at a glance:

360° view on all activities related to a record:
- **List view:** Show activities in reverse chronological order
- **Advanced search and filter capabilities** (content, status, type, date-range)
- **Preview pane:** Direct preview of activities and attachments
- **Load "on-demand"** to ensure high performance

- **Fully customizable layout and preview pane**
- Can be **embedded into any entity form or dashboards**
- Support for user-views (inbox) and queue-views

The preview pane shows the content of the selected activity. All details can be opened from this preview pane.

ActivityTools provides you with a list of all related activities. Create, search & filter activities from within the menu.

ActivityTools is available for:

Microsoft CRM 2011, 2013, 2015, 2016 Online / On Premise / Hosted (IFD), Microsoft Dynamics 365

TelephoneIntegration (TI)

Connect your phone system to Dynamics 365

Your benefits at a glance:

Capture and track phone calls:
- **Caller Recognition:** Once a call is recognized, our solution will search the Dynamics 365 system and display information about the caller
- **Screen Pops:** Dynamics 365 records and call activities can be configured to automatically pop-up on incoming and outgoing calls
- **Auto creation of Dynamic 365 records:** Create new records on incoming calls (e.g. phone calls, tasks, cases,opportunities, accounts, contacts or leads)

Simplify dialing:
- **Click2Dial** on phone number or with a click on the 'Call number'-button in the command bar from within the balloon simply by entering the phone number
- '**Dialing from related records**' enables you to call phone numbers from related records (e.g. call directly from an opportunity)

Additional features:
- **Call statistics inside Dynamics 365: Track every call**
  This allows you to analyze your calls based on Dynamics 365 dashboards
- **The PowerDialer supports dialing lists**
  Dialing lists are created directly from campaign activities or power dialing entities in Dynamics 365
- **Supports Unified Service Desk (USD)**
  Instead of opening Dynamics 365 records in your browser, the Dynamics 365 records (contact, account, lead) are opened in the USD Client

Supported phone systems
- Skype for Business
- HTTP API/SIP Client (connect via VoIP thanks to our built-in SIP Client wrapper)
- TAPI driver enabeld phone systems like Cisco, Alcatel, Siemens and many more
- RingCentral
- Interactive Intelligence

Microsoft Dynamics 365

Telephone Integration 9.114

| All | Answered | Dialed | Missed | CRM |

Find

⇐ 🔳 Kari Furse   1:03 PM
Dialed Call   00:30
680881   6/18/2018
Address 1: ZIP/Postal Code:72052
Address 1: Country/Region:US

The balloon builds the bridge between Dynamics 365 and phone systems.

Open in CRM
Search potential
New Activity   ▶
New Entity   ▶   🔧 Create Case
Copy Number   ☐ Create Opportunity
Remove this Call   🖼 Create Client
                             📇 Create Account
                             📞 Create Lead

🔳 555544884   12:54 P
🔳 680880   3:54 P
🔳 Kari Furse   3:51 P
🔳 Kari Furse   3:50 PM
🔳 680880   3:50 PM
🔳 Kari Furse   3:48 PM
⇒ Allison Brown   3:47 PM
⇒ 555544884
⇒ 555544884

📞 Call ▾

TI works fine with the most common of the phone providers on the market.

TelephoneIntegration is available for:
Microsoft CRM 2011, 2013, 2015, 2016 Online / On Premise / Hosted (IFD), Microsoft Dynamics 365

11

SmartBar (SB)

Navigate in Microsoft Dynamics 365 like a pro

Your benefits at a glance:

- **Smart navigation** between related Dynamics 365 records **(Simple back & forth navigation)**
- **Configurable Views:** Display critical information like "Open Cases" or "Opportunities over 10K"
- Numbers next to the button **indicate the number of related records per entity**
  (e.g. the number of quotes, orders, etc. related to the opened record is counted)
- **Color-coding:** Hide buttons or change button color based on defined count ranges

- **Drag & drop functionality** enables users to change the buttons order
- Display SmartBar in **Standard or Metro Style, a vertical/horizontal order and various colors**
- **Create custom buttons** (JavaScript Function, Links, Views, Entity/SiteMap, Scroll to section)
- Fully **customizable look & feel**: Embedded into any entity or dashboard (personal menus)
- S**how/Hide buttons** based on count or field values

SmartBar buttons allow count of & quick access to related records.

Customizable color & size give a clear overview on related records.

SmartBar is available for:
Microsoft CRM 2013, 2015, 2016 Online / On Premise / Hosted (IFD), Microsoft Dynamics 365

PowerSearch (PS)

Finding records in Microsoft Dynamics 365 has never been easier

Your benefits at a glance:

Search capabilities:
- **Simple UI** for complex reusable queries
- **All search operators supported** (as in Advanced Find)
- Support of **AND/OR keywords**
- **User defined default search values**

Working with results:
- **Result preview:** View result details without opening them
- **Customizable grid** with access to results and related records
- **Open results in Dynamic 365 grids to support common tasks** (bulk edit, export to Excel, ...)
- **Execute workflows/actions** against results (single & bulk)

Configuration:
- Fully **customizable search & result fields**
- **Customizable previews and actions**
- **Convert Advanced Find** via fetch import

Define an unlimited number of fields that allow a search in all Dynamics 365 entities.

Get a quick overview of results within our fully customizable preview pane.

PowerSearch is available for:
Microsoft CRM 2011, 2013, 2015, 2016 Online / On Premise / Hosted (IFD), Microsoft Dynamics 365

GroupCalendar (GC)

Schedule & reschedule users, groups and resources via drag & drop

Your benefits at a glance:

Scheduling feature:
- **Define/select/display** users, teams, resources and/or resource groups
- Display **time-off and working hours of your users**
- **Color coding of activities** manually or via business rules
- **Print & Print preview**
- Fully **customizable content**
- **Embed our add-on into any entity**

Views:
- All views available in day-, week- or month-view
- TopDown-view (like Outlook), List-view, Gantt-view, Timeline-view and Agenda-view

The view selection enables you to switch between day-, week- or month view.

Mark your appointments by adding various colors. The color coding functionality makes it possible.

New activities can be quickly added to the calendar. Create more detailed ones using the GroupCalendar SideBar.

Simply hover over an activity/ appointment in order to get a detailed preview.
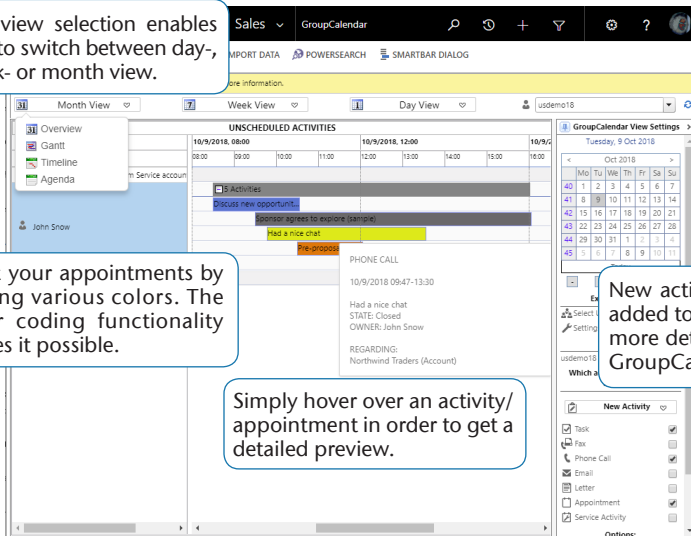
GroupCalendar is available for:

Microsoft CRM 2011, 2013, 2015, 2016 Online / On Premise / Hosted (IFD), Microsoft Dynamics 365

Partner Program

Working with partners is the key to success!

Your benefits at a glance:

Our resellers form a major part of our distribution network. They integrate our Add-ons in their one-stop-shop solutions for clients all over the world and therefore enable easy access to our products on local markets. We appreciate the mutual partnership and our reseller's commitment.

- **Partner Levels:**
  Different partnership-levels based on annual revenue generated with mscrm-addons
- **Reseller margin for all sales of our solutions:**
  Your margin depends on your annual sales volume
- **Free Internal Use and Resell – licenses**
  After signing up, you will be provided with free licenses valid for 3 months. Once a license is sold, the licenses are extended for a further year
- **Ongoing Educational offering for your team**
  Free support via e-mail, online-chat/-sessions, or telephone, frequent online training to keep your consultants and sales teams up to date
- **Weekly Live Demonstrations of our Add-ons for Dynamics 365**
  Every week you can join us for live overviews and demonstrations of our Add-ons to explore how our solutions can be used to increase usability and productivity
- **Improve your Dynamics 365-offer without investing time in development & support**
  Partners can boost their Dynamics 365 offering without the need to develop & support the solutions involved
- **No Dynamics 365-service competition: mscrm-addons.com is a strict non-revenue ISV**
  To avoid potential partner conflicts, we do not provide Dynamics 365 services. We always pass on customer requests to our partners. If our partners need assistance and request our help, we offer development services (hourly rate on request)
- **Building long-term relationships with your customers**
  By providing a point of contact when it comes to working with our solutions, our partners can establish and maintain long-term relationships with their customers
- **NO Minimum, NO Fees**

If you are interested in becoming a reseller, please register on our website and fill & submit the reseller form, which can be found under the link below:
www.mscrm-addons.com/About-us/Partner-Program/Become-a-reseller

Pricelist in EUR

Product	Normal License[1]		„PerUser" License[2]	
	Price	Support & Maint. [3]	Price	Support & Maint. [3]
DocumentsCorePack Client	60 €	14 €	120 €	28 €
GroupCalendar (GC)	60 €	14 €	120 €	28 €
ActivityTools (AT)	45 €	14 €	90 €	28 €
PowerSearch (PS)	45 €	14 €	90 €	28 €
SmartBar (SB)	25 €	14 €	x	x
TelephoneIntegration (TI)	x	x	120 €	28 €

Value Package

	Price	Support & Maint. [3]
Value Package (GC, AT, PS, SB combined)	120 €	28 €

Subscription Prices [4]

Product	Normal License[5]		„PerUser" License[6]	
	monthly	annually	monthly	annually
DocumentsCorePack Client	3,50 €	3,00 €	6 €	5 €
GroupCalendar (GC)	3,00 €	2,50 €	6 €	5 €
ActivityTools (AT)	2,50 €	2,00 €	5 €	4 €
PowerSearch (PS)	2,50 €	2,00 €	5 €	4 €
SmartBar (SB)	1,60 €	1,25 €	x	x
TelephoneIntegration (TI)	x	x	6 €	5 €

*1… .Normal-license: You will need to buy as many licenses as there are active users in your Dynamics 365 system
*2 … „PerUser"-license: GC, AT, PS and DCP-Cl requires a minimum amount of 10. TI requires a minimum of 5
*3 … Support & Maintenance price / user / year (year one included in the initial purchase)
*4 … The minimum term of the subscription contract is one month or one year; yearly rate (monthly rate x 12)
*5… .Normal-license: You will need to buy as many licenses as there are active users in your Dynamics 365 system (AT, DCP-Cl, GC, PS, SB require a minimum of 5)
*6 … „PerUser"-license: GC, AT, PS, TI and DCP-Cl requires a minimum amount of 10

Pricelist in EUR

DocumentsCorePack (DCP)

Package	Perpetual License		Subscription			
	Price	Support*[1]	monthly	annually	Documents incl.	TD *[2]
XS (≤ 10 users)	660 €	130 €	55 €	600 €	500	1
S (11 - 30 users)	1.200 €	240 €	90 €	990 €	1.000	1
M (31 - 80 users)	3.000 €	600 €	150 €	1.560 €	5.000	2
L (81 - 140 users)	5.000 €	1.000 €	200 €	2.100 €	10.000	2
XL (141 - 300 users)	10.000 €	2.000 €	420 €	4.560 €	25.000	5
XXL (301 - 600 users)	19.000 €	3.800 €	790 €	8.280 €	50.000	10
Enterprise (600+ users)	on request		on request		on request	
Additional Packages						
1,000 documents	x		10 €	7 €	x	
1 Template Designer	x		6 €	5 €	x	

AttachmentExtractor (AE)

Package	Perpetual License		Subscription	
	Price	Support & Maint. *[1]	annually*[3]	Bandwidth*[4]
XS (≤ 10 users)	660 €	165 €	600 €	2.5 GB
S (11 - 30 users)	1.200 €	300 €	990 €	5 GB
M (31 - 80 users)	2.400 €	600 €	1.440 €	10 GB
L (81 - 140 users)	3.000 €	760 €	1.800 €	15 GB
XL (141 - 300 users)	5.000 €	1.250 €	2.880 €	20 GB
XXL (301 - 600 users)	8.300 €	2.075 €	4.980 €	25 GB
Enterprise (600+ users)	on request			

*1 … Support & Maintenance price / user / year (year one included in the initial purchase)
*2 … TD = Template Designer included in this package
*3 … The minimum term of contract is one year; billing is conducted once a year (monthly rate x 12)
*4 … The amount of data that can be transmitted per month

Pricelist in USD

Product	Normal License[1]		„PerUser" License[2]	
	Price	Support & Maint. [3]	Price	Support & Maint. [3]
DocumentsCorePack Client	$ 75	$ 19	$ 150	$ 38
GroupCalendar (GC)	$ 75	$ 19	$ 150	$ 38
ActivityTools (AT)	$ 55	$ 19	$ 110	$ 38
PowerSearch (PS)	$ 55	$ 19	$ 110	$ 38
SmartBar (SB)	$ 30	$ 19	x	x
TelephoneIntegration (TI)	x	x	$ 150	$ 38

Value Package		Price	Support & Maint. [3]
Value Package (GC, AT, PS, SB combined)		$ 150	$ 38

Subscription Prices [4]

Product	Normal License[5]		„PerUser" License[6]	
	monthly	annually	monthly	annually
DocumentsCorePack Client	$ 4.50	$ 4.00	$ 8	$ 7
GroupCalendar (GC)	$ 4.00	$ 3.50	$ 8	$ 7
ActivityTools (AT)	$ 3.00	$ 2.50	$ 6	$ 5
PowerSearch (PS)	$ 3.00	$ 2.50	$ 6	$ 5
SmartBar (SB)	$ 2.00	$ 1.75	x	x
TelephoneIntegration (TI)	x	x	$ 8	$ 7

[1] … Normal-license: You will need to buy as many licenses as there are active users in your Dynamics 365 system
[2] … „PerUser"-license: GC, AT, PS and DCP-Cl requires a minimum amount of 10. TI requires a minimum of 5
[3] … Support & Maintenance price / user / year (year one included in the initial purchase)
[4] … The minimum term of the subscription contract is one month or one year; yearly rate (monthly rate x 12)
[5] … Normal-license: You will need to buy as many licenses as there are active users in your Dynamics 365 system (AT, DCP-Cl, GC, PS, SB require a minimum of 5)
[6] … „PerUser"-license: GC, AT, PS, TI and DCP-Cl requires a minimum amount of 10

Pricelist in USD

DocumentsCorePack (DCP)

Package	Perpetual License		Subscription			
	Price	Support*1	monthly	annually	Documents	TD *2
XS (≤ 10 users)	$ 900	$ 180	$ 70	$ 720	500	1
S (11 - 30 users)	$ 1,700	$ 340	$ 120	$ 1,320	1,000	1
M (31 - 80 users)	$ 4,000	$ 800	$ 210	$ 2,220	5,000	2
L (81 - 140 users)	$ 6,800	$ 1,360	$ 275	$ 2,880	10,000	2
XL (141 - 300 users)	$ 13,700	$ 2,740	$ 550	$ 5,640	25,000	5
XXL (301 - 600 users)	$ 26,000	$ 5,200	$ 1,050	$ 11,100	50,000	10
Enterprise (600+ users)	on request		on request		on request	
Additional Packages						
1,000 documents	x		$ 13	$ 10	x	
1 Template Designer	x		$ 8	$ 7	x	

AttachmentExtractor (AE)

Package	Perpetual License		Subscription	
	Price	Support & Maint. *1	annually*3	Bandwidth*4
XS (≤ 10 users)	$ 900	$ 220	$ 720	2.5 GB
S (11 - 30 users)	$ 1,700	$ 425	$ 1,320	5 GB
M (31 - 80 users)	$ 3,200	$ 800	$ 1,800	10 GB
L (81 - 140 users)	$ 4,000	$ 1,000	$ 2,400	15 GB
XL (141 - 300 users)	$ 6,800	$ 1,700	$ 3,720	20 GB
XXL (301 - 600 users)	$ 11,300	$ 2,825	$ 6,600	25 GB
Enterprise (600+ users)	on request			

*1 … Support & Maintenance price / user / year (year one included in the initial purchase)
*2 … TD = Template Designer included in this package
*3 … The minimum term of contract is one year; billing is conducted once a year (monthly rate x 12)
*4 … The amount of data that can be transmitted per month

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DocumentsCorePack
Professional document generation and processing in Dynamics 365

GroupCalendar
Effective Scheduling of users, teams and resources in Dynamics 365

TelephoneIntegration
Connect your phone system with Microsoft Dynamics 365

SmartBar
Smart navigation between related Dynamics 365 records

AttachmentExtractor
Extract files and e-mail attachments to SharePoint or a fileshare

ActivityTools
Simple overview of Dynamics 365 activities Outlook - Look & Feel for e-mails

PowerSearch
Combine the simplicity of Dynamics 365 Search with the features of Advanced Find

Simple solutions
that guarantee
high productivity:

Boost Microsoft Dynamics 365 with our add-ons!

Get your free trial today on

www.mscrm-addons.com

or

appsource.microsoft.com

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