



# DocumentsCorePack ServerBased Getting Started from the mscrm-addons.com website

Hello!

Thank you for your interest in [DocumentsCorePack ServerBased](#). This Getting Started Guide will help you to install this Add-On from our website. For detailed information, please take a look at our [guides](#) or [blogs](#).

The web-based setup allows users to configure DocumentsCorePack ServerBased Document Generation for Microsoft Dynamics 365 Online without local installations. The service, as well as licensing, can be configured and maintained on our website.

Therefore, please go to our website [www.mscrm-addons.com](http://www.mscrm-addons.com), navigate to **1** Products, select DocumentsCorePack and click on the **2** *[Configure Service]*-button as you can see in the figure below.

The screenshot shows the mscrm-addons.com website. The navigation menu includes: HOME, PRODUCTS (highlighted with a red circle and the number 1), ONLINESHOP, DOWNLOADS, ABOUT US, SUPPORT, and MY ACCOUNT. The main content area features the product title "DocumentsCorePack for Microsoft Dynamics 365" and a description: "Professional document generation and processing in Microsoft Dynamics 365!". Below this, it states: "Based on MS Word-templates, DocumentsCorePack provides you with a set of tools to create and process documents effectively. From a document generation wizard that guides users through the process to full document automation - DocumentsCorePack will make your business documents look professional and help you to process them efficiently!". The supported platforms are listed as: "Supported platforms: CRM 3.0 up to CRM 2016 - Online, OnPremise, Hosted (IFD) and Dynamics 365 (Sales / Customer Services / Field Services / Project Services Automation)". At the bottom, there are several buttons: "Join Weekly Webinar", "Configure Service" (highlighted with a red circle and the number 2), "Download", "Test in Dynamics 365 Online", "Perpetual Pricing", and "Subscription Pricing".

Figure 1: Open the DocumentsCorePack Online Service Configuration

Next, please login or register to mscrm-addons.com:

Products / DocumentsCorePack for Microsoft Dynamics 365 / DocumentsCorePack Service Configuration

## Service Configuration



The configuration wizard provides you with all tools for server-based document generation right away! To get started, take the "tour" below or watch the video for a detailed description about how to power up your system with server-based document generation for Microsoft Dynamics 365 Online!

**IMPORTANT: You need to log-in or register below in order to access the Online Service Configuration**

This area requires you to login or register for mscrm-addons.com

[Login or register to mscrm-addons.com](#)

Figure 2: Login or register to mscrm-addons.com

The registration is quick and free. Once logged in, you will:

- Have access to all our **free 14-days trial** versions
- Be able to **request full support** on all trial versions
- Receive our **newsletter**
- Be **able to upgrade free trial versions to licensed products**

[So if you aren't registered yet – it's worth a try!](#)

### 1. Set up a DocumentsCorePack service

Once you have logged in, you will be provided with the Online Configuration window. You can set up a service with a click on the **[Add]**-button, highlighted in yellow in the figure below.

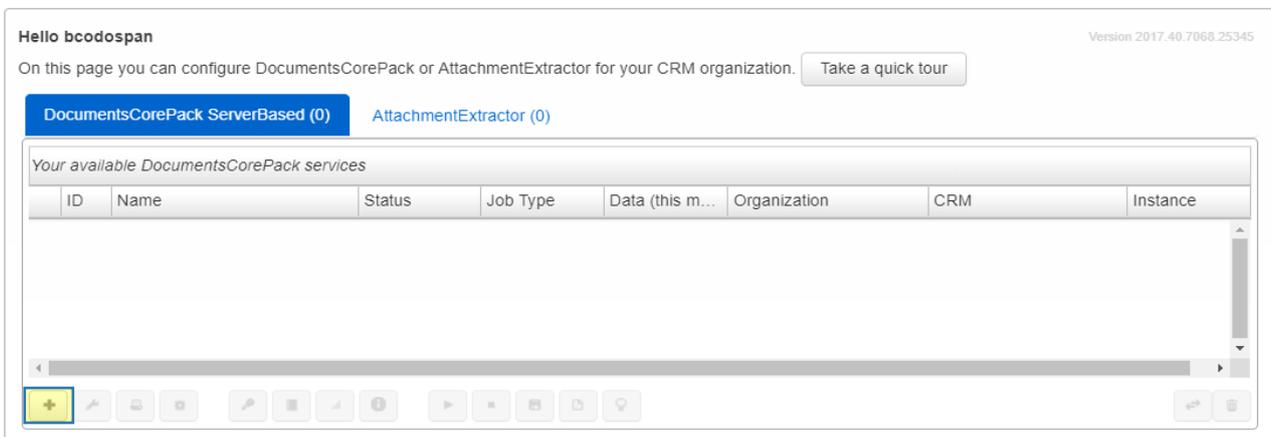
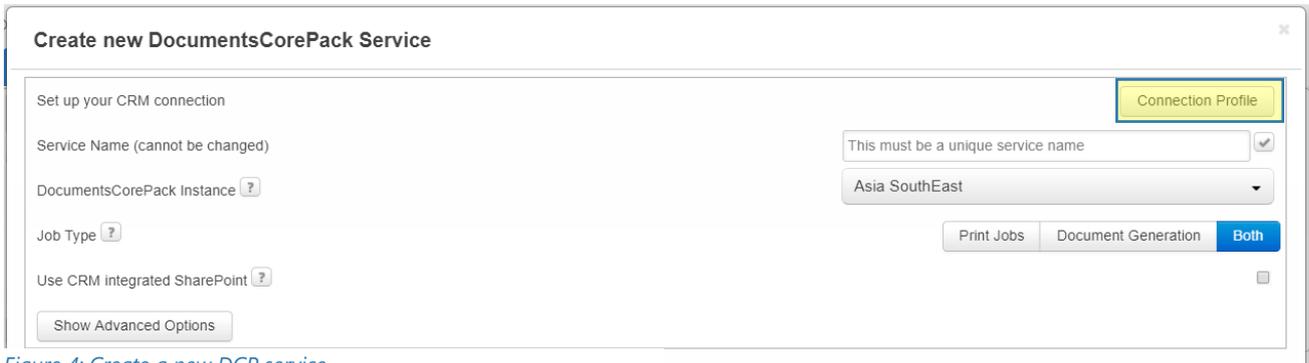


Figure 3: The Online Configuration window

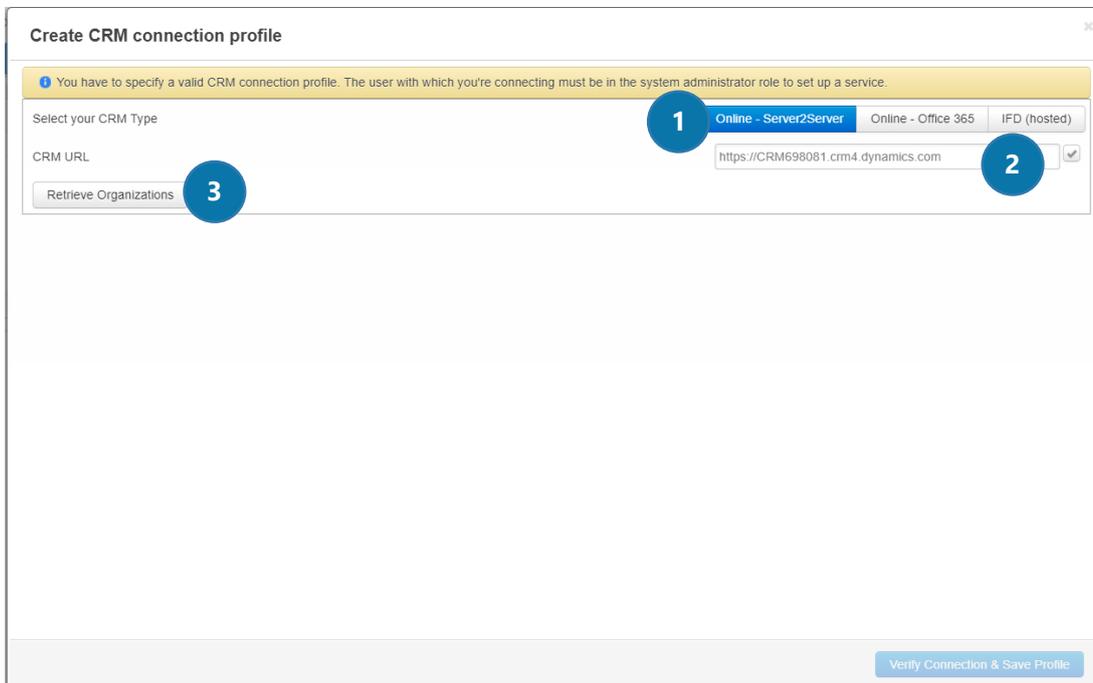
Please click on the **[Add]**-button in order to add a new service. Next, click on the **[Connection Profile]**-button.



The screenshot shows a dialog box titled "Create new DocumentsCorePack Service". It contains several input fields: "Service Name (cannot be changed)", "DocumentsCorePack Instance", "Job Type", and "Use CRM integrated SharePoint". There is a "Show Advanced Options" button. On the right side, there is a "Connection Profile" button, a text field with the placeholder "This must be a unique service name", a dropdown menu currently showing "Asia SouthEast", and three buttons: "Print Jobs", "Document Generation", and "Both".

Figure 4: Create a new DCP service

Next, the window below appears. Here, you have to select:



The screenshot shows a dialog box titled "Create CRM connection profile". It features a yellow warning banner at the top: "You have to specify a valid CRM connection profile. The user with which you're connecting must be in the system administrator role to set up a service." Below this, there are three main sections: "Select your CRM Type" with radio buttons for "Online - Server2Server", "Online - Office 365", and "IFD (hosted)"; "CRM URL" with a text input field containing "https://CRM698081.crm4.dynamics.com"; and a "Retrieve Organizations" button. A "Verify Connection & Save Profile" button is located at the bottom right. Three blue circles with numbers 1, 2, and 3 are overlaid on the image to highlight the CRM type selection, the URL input, and the "Retrieve Organizations" button, respectively.

Figure 5: Create a CRM connection profile

**1 SELECT YOUR CRM TYPE**

- Server2Server, Office 365, IFD (hosted) – Server2Server is selected per default

**2 TYPE IN YOUR CRM URL**

- for example <https://CRM698081.crm4.dynamics.com>

To finish the process, click on the **[Retrieve Organizations]**-button **3**.

This leads you to the Microsoft Sign in page, where you have to enter your credentials. Please login in with the user that should be used to connect the service with Dynamics 365 instance. Dynamics 365 administrator privileges are required!

As soon as your organization appears in the **1** Available Organizations section, it is possible to **2** set up a SharePoint connection. But in this case, click on the **3** **[Verify Connection & Save Profile]**-button to continue.

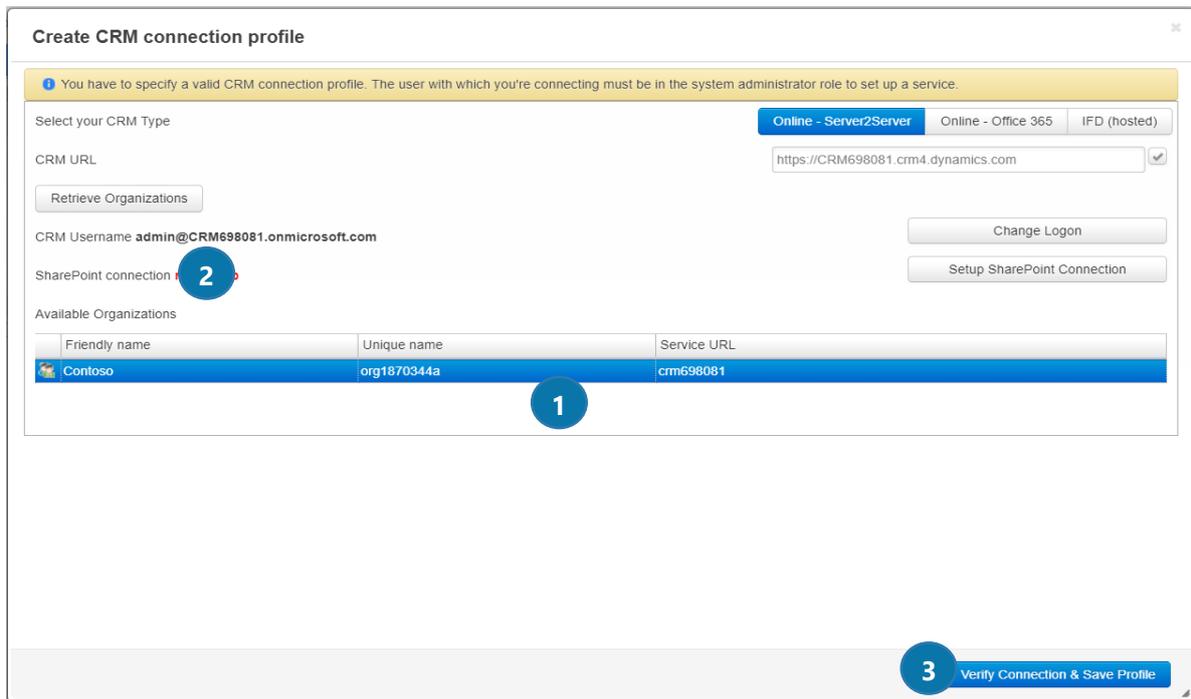


Figure 6: Verify your connection and save your profile

Now the following window appears. It is important that you do not close this window or navigate away.

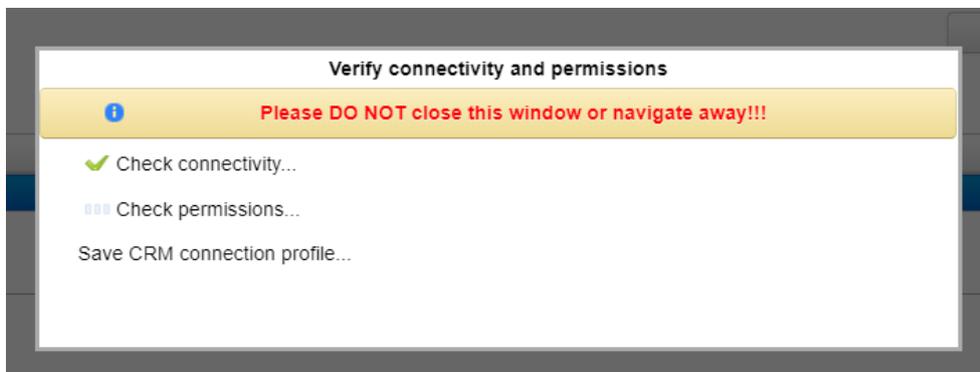
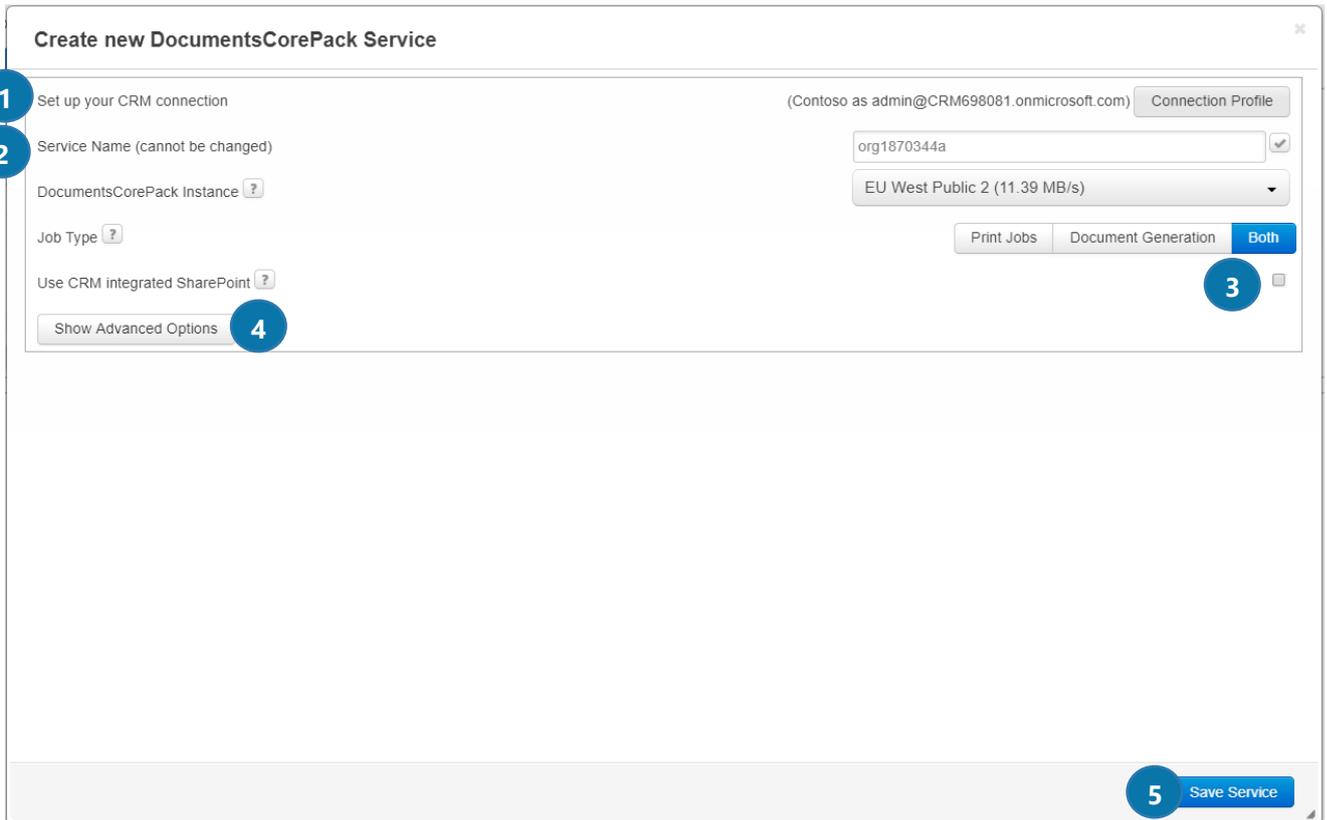


Figure 7: Verify connectivity and permissions

You are now back in the same window as before. This window supports you in creating a new service.



**Create new DocumentsCorePack Service**

(Contoso as admin@CRM698081.onmicrosoft.com) Connection Profile

1 Set up your CRM connection

2 Service Name (cannot be changed) org1870344a

DocumentsCorePack Instance ? EU West Public 2 (11.39 MB/s)

Job Type ? Print Jobs Document Generation Both

Use CRM integrated SharePoint ? 3

Show Advanced Options 4

5 Save Service

Figure 8: Create a new DCP service

### 1 SERVICE NAME

Please enter your service name here. But choose wisely, because the name cannot be changed anymore!

### 2 DOCUMENTSCOREPACK INSTANCE

Please select on which instance the DocumentsCorePack Service should run. The instance with the highest bandwidth is automatically selected for you.

### 3 SHAREPOINT INTEGRATION

Please select if you want to enable CRM integrated SharePoint, which allows DocumentsCorePack to connect to SharePoint and upload documents. Once you enable this option, two fields appear where you have to enter your SharePoint credentials.

### 4 SHOW ADVANCED OPTIONS (OPTIONAL)

A click on this button, allows you to refine the settings of your new service. More information about these options can be found in the corresponding [documentation](#) on page 21.

Next, click on the **5 [Save Service]**-button in the right lower corner in order to proceed. Click on the **[OK]**-button in the window that appears now (see figure below).

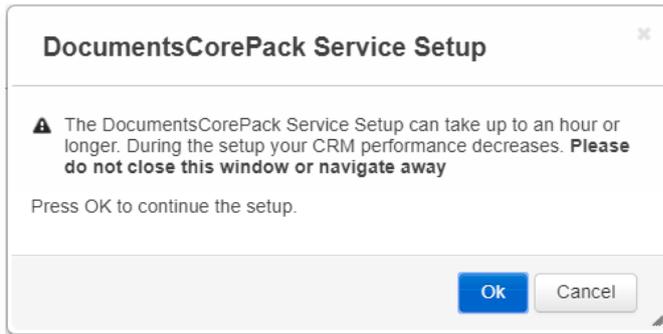


Figure 9: DCP Service Setup

As soon as the service configuration is completed, you will be informed about the next steps you can take. Click on the License Status-option in order to check your license status. Please read the instructions carefully and click on the **[OK]**-button in order to proceed.

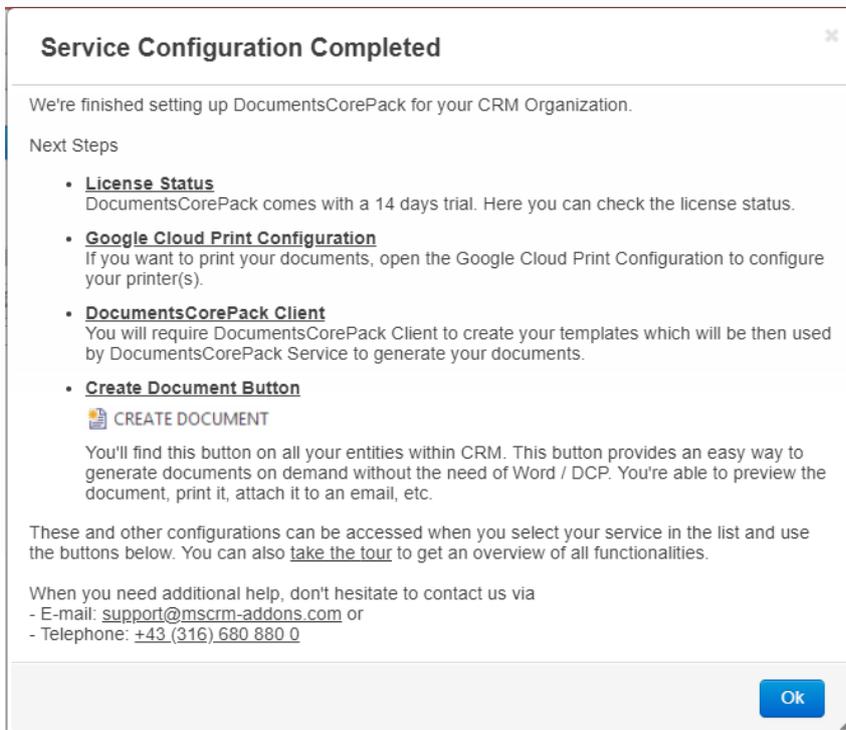


Figure 10: Service Configuration Completed

Congratulation! You have finished the configuration of your service. You are now redirected to the service configuration overview (see figure below). The DocumentsCorePack service is already running. Using the buttons at the end of the service overview, you can define which steps you would like to take next. Please find a brief description of the DocumentsCorePack buttons in the corresponding [documentation](#) on page 10.



## 2. How to use DocumentsCorePack

Once the Add-On is installed click on the **[Create Document]**-button in the Dynamics 365 Command Bar to generate e.g. quotes and invoices.

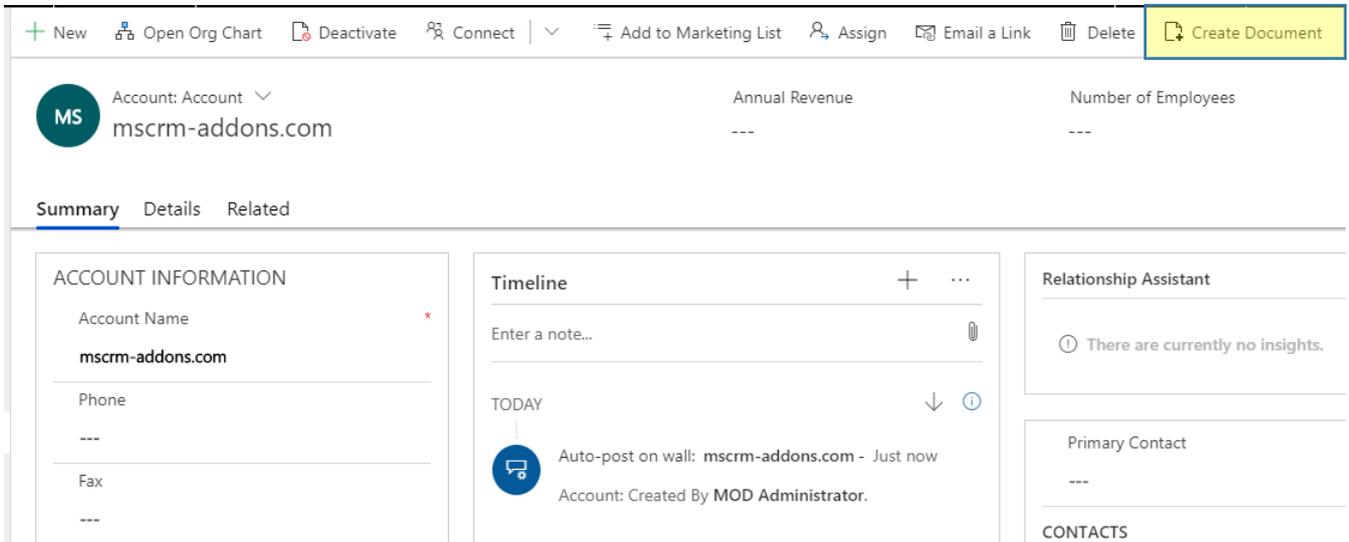


Figure 12: The Create Document functionality

- 1) With a click on it, the DocumentsCorePack Dialog appears. The DocumentsCorePack Dialog is an easily accessible tool to create and process documents directly within Dynamics 365. As you can see in the figure below, six standard templates come with the installation of DocumentsCorePack.

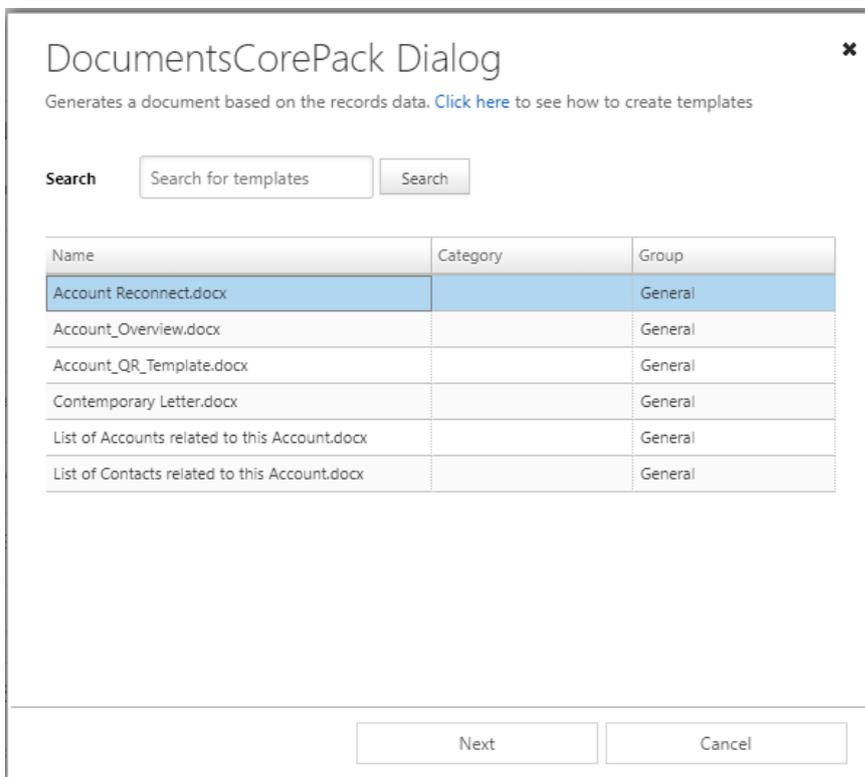


Figure 13: The DocumentsCorePack Dialog

- 2) Choose the appropriate template and proceed with a click on the **[Next]**-button.

- 3) The DocumentsCorePack Dialog contains a set of options. The options vary and change depending on the selections you perform. In this case, you simply generate a document as pdf. Find more information about the DCP Dialog in the [DocumentsCorePack User Guide](#) (chapter 3.2 DocumentsCorePack Dialog options). Click on the **[Next]**-button to proceed.

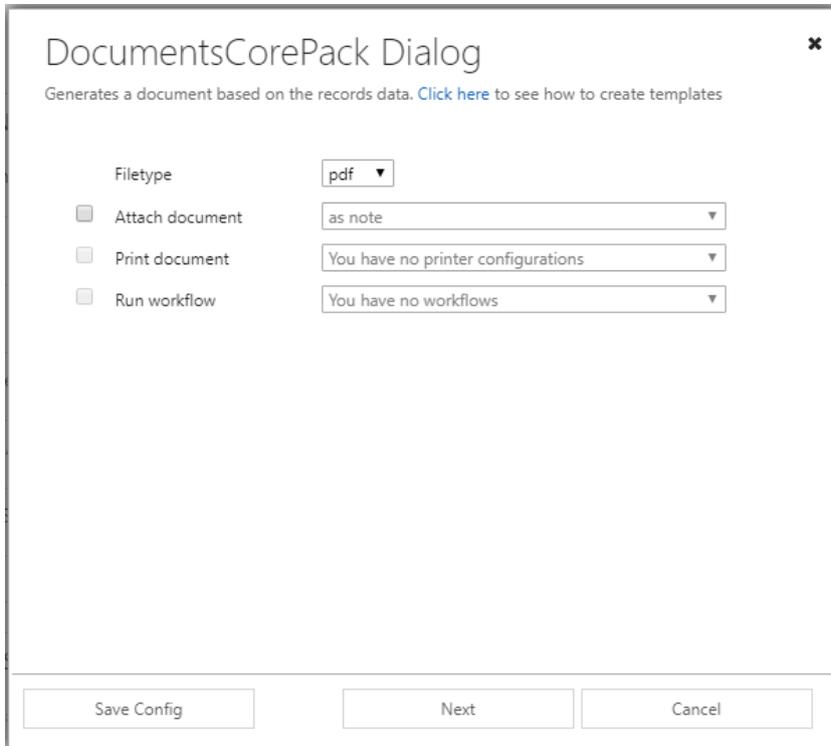


Figure 14: The DocumentsCorePack Dialog options

- 4) Before finishing the process, it is possible to preview the document by hitting the **[Preview]**-button, highlighted in yellow below.

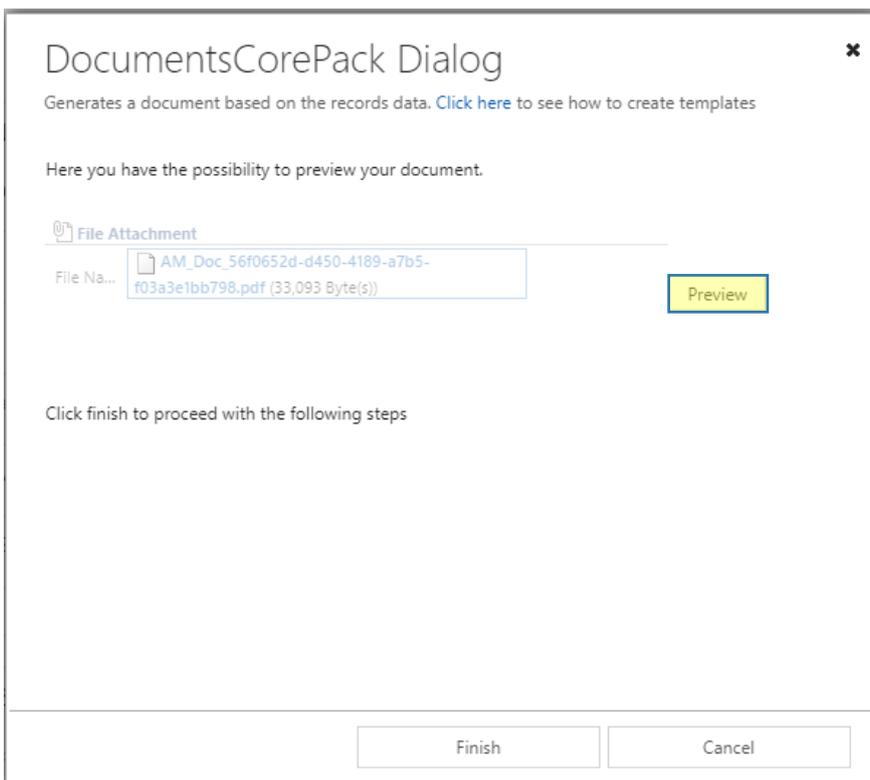


Figure 15: The DocumentsCorePack Dialog: Preview document

- 5) Next click on the **[Finish]**-button to complete the process. Congratulation, as you can see below, you have created your first document.

MOD Administrator

June 4, 2019

mscrm-addons.com

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To Whom It May Concern:

We have not heard from you for a while. I wanted to check in and make sure that you are still having a great experience using our product(s). I will contact you next week to get your feedback on the product(s) you are currently using and to give you details about our upcoming products.

Sincerely,

MOD Administrator

*Figure 16: PDF of Account Reconnect template*

### 3. Create your own templates

To create own custom templates, you require the DocumentsCorePack Client (Template Designer), which can be downloaded [here](#).

The Template Designer will help you to create templates for each Microsoft Dynamics 365 entity (for example Contact, Account, Opportunities ...).

The DCP Template Designer can be easily accessed via the [www.mscrm-addons.com](http://www.mscrm-addons.com) – tab in the Microsoft Word command bar, as you can see in the figure below, and provides you with a lot of options that facilitate the creation of templates.

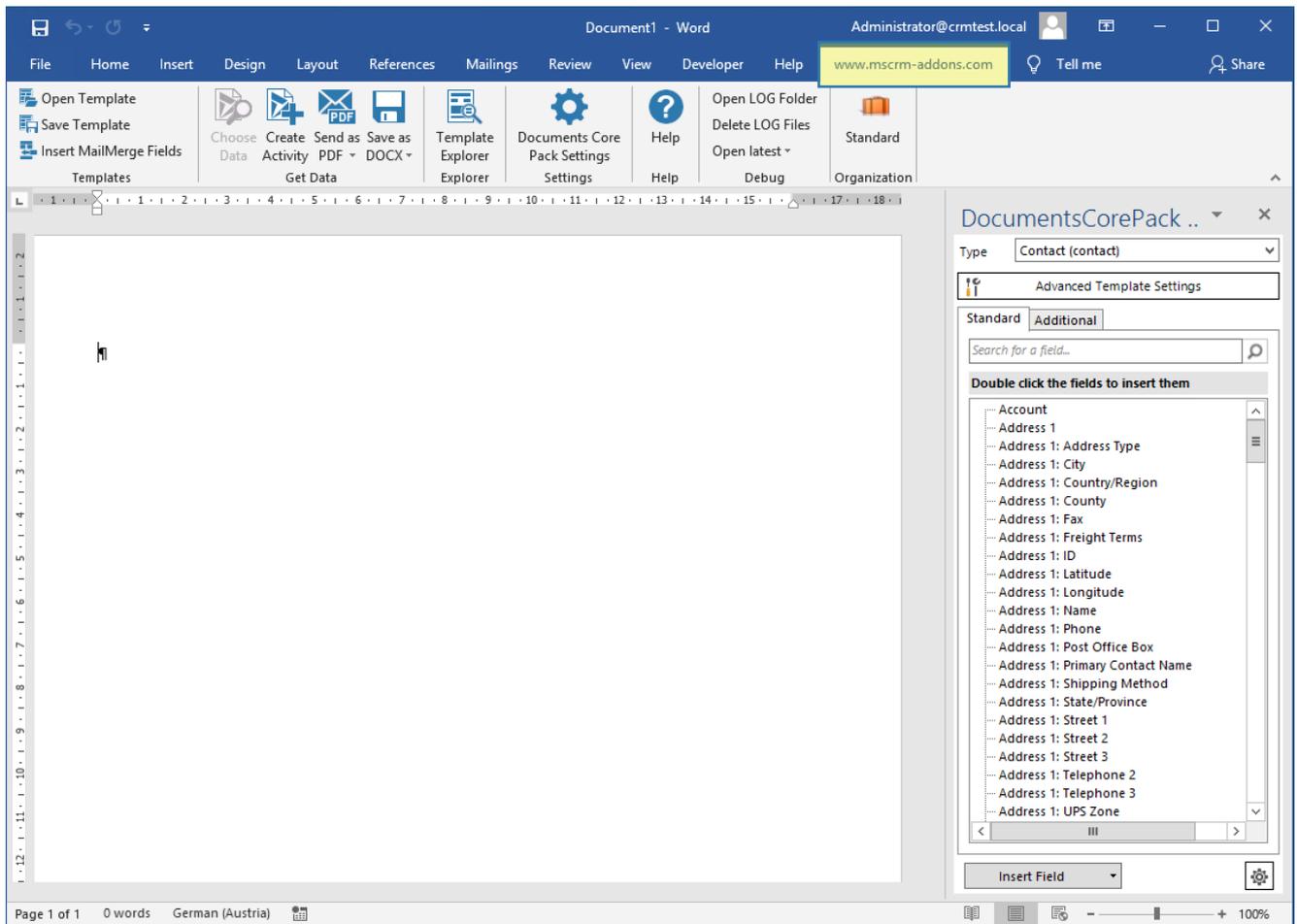


Figure 17: Microsoft Office Word with mscrm-addons ribbon

Please find more information on how to use the Template Designer in the corresponding [DocumentsCorePack Template Designer guide](#).

## License Manager

All our Add-Ons come with a 14-days trial license. Once received the license from our support-team, open the License Manager to install it. For more information, have a look at the [Licensing Guide](#).

We hope our product is to your full satisfaction and a useful supplement to your business activities. If you have questions, please contact us via the contact information below.

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## 2 Contact

For further technical questions, please visit our blog <http://blogs.mscrm-addons.com> or contact [support@mscrm-addons.com](mailto:support@mscrm-addons.com).

For sales and licensing questions please contact [office@mscrm-addons.com](mailto:office@mscrm-addons.com) or the corresponding contact information below.



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