

## Push the boundaries of Microsoft Dynamics 365 with our addons!

# PRODUCT CATALOG





DocumentsCorePack (DCP) Professional document generation & processing in Dynamics 365 and the Power Platform
AttachmentExtractor (AE) Save money by extracting documents to an alternative storage
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PowerSearch (PS) Fave time finding records in Dynamics 365
GroupCalendar (GC) mprove scheduling and time management for users, groups, and resources in Dynamics 365
Partner Program Vorking with partners is the key to success
Pricelist



### 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

Get your FREE TRIAL on AppSource or on www.mscrm-addons.com!

### Document Generation & Processing - Your benefits at a glance:

# The 'Dialog': Accessible from the command bar, the dialog enables to 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

DocumentsCorePack Dialog	X ← 1 Send 🖬	l Save 🖉 Save & Close 📓 Export to Word   🗸 🗅 Create Document 🕐 Refresh 🔍 Check Access 🔋 Art	tach File 🔓 Insert Template   🗠 😏 Insert Signature 🗄
Generates a document based on the records data. Click here to see how to create templates	Email - Email -	rDocumentsCorePack & AttachmentExtractor	Normal Draft John Snow Pronty Due Status Reason Owner V
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## **Document Automation - Your benefits at a glance:**

- PowerApps-Connector: The DocumentsCorePack connector for Power Automate and Canvas Apps allows you to utilize your document capabilities in your custom applications and back ground processes (Flows)
- Dynamics 365 processes integration: Automate your document processes via Dynamics 365
  workflows or Microsoft Flow
- · Reducing your user's workload and standardizing your internal and external documents
- Scheduled reports (daily, weekly, monthly)

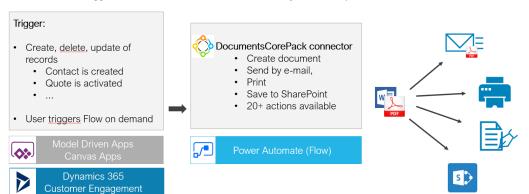
66 We at Blanchard are very pleased with the product and would highly recommend mscrm-addons products to anyone looking for a robust yet flexible document merge and delivery solution.

Ed Glover, Blanchard Company, Inc

2. Within the Flow, DocumentsCorePack provides a broad variety of

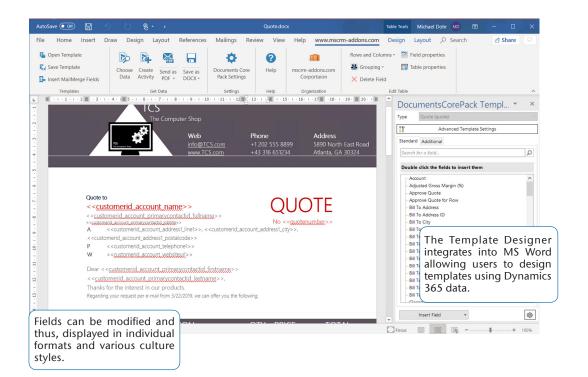
actions to automatically create and process documents

#### 1. Event occours in your environment and triggers a Flow



### Template Design - Your benefits at a glance:

- Microsoft Word based: No design/feature limitations
- Dynamics 365 connector: Map any fields from Dynamics 365 or DataVerse
  - 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)



#### DocumentsCorePack is available for:



## General Functionalities & Document Generation/Processing Comparison Chart

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

Features	DocumentsCorePack	Native document generation
Running on server	1	✓
• as plugin	1	
as separate service	1	
DocumentsCorePack Dialog	1	X
One click document generation	1	X
Create document in workflow	1	1
Create document with dynamic names	1	×
Supported file types	.docx, .pdf, .html, .txt	.docx
Generate activities (e.g. email with document attached)	1	×
Generate e-mail messages	1	×
e-Signature integration	1	×
Define Commands (e.g. Create document & send by e-mail)	1	×
Secure your .pdf using a password	1	×
Advanced security settings for .pdf-files	1	×
Attach to e-mail	1	x
Run workflow	1	×
Save documents to SharePoint or local device	1	×
Create SharePoint locations	1	×
Write Metadata to SharePoint	1	×
Attach as note	1	✓ Note located at primary record
Configurable save locations (SharePoint, fileshare)	1	×
Attach to letter	1	×
Print documents	1	x
• with Network printer	1	x
• with Google printer	1	×
Protect fillable .pdf form fields	1	×
Document Preview	1	×
Edit documents during document generation (for quick and easy mass mailings)	✓	×
Batch processing from Dynamics 365 Grid	1	×
Combine documents	1	×

## **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	✓	1
Subcategorize templates	<	×
Related records	√	×
Relationship-types many-to-one, one-to-many, many-to-many	√	✓ limited to one level
Resolve multiple relationship levels	1	×
Elimination of blank lines for addresses	✓	×
Filter related records	√	×
Sorting	✓	×
Grouping and totals	1	×
Define document names	√	X
nsert Calculations	√	X
nsert Conditions	√	√
Insert Pictures	√	x
e-Signature Integration	✓	×
Insert DocuSign	√	×
Insert AssureSign	✓	×
Insert AdobeSign	✓	×
Save as note in Dynamics 365	√	X
Entity Images	√	1
Save as web-path in Dynamics 365	✓	×
Insert HTML	✓	×
Insert QR-codes based on Dynamics 365 data	√	×
Insert dynamic hyperlinks	√	x
String manipulation	✓	×
Field formatting	√	×
Aggregation support	✓	×
Connect to external database	✓	×
Creation of label templates	✓	×
Sub-template support	√	×
Easy generation of tables	✓	×
Template testing capabilities	✓	x





"

## AttachmentExtractor (AE)

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

### Get your FREE TRIAL on AppSource or on www.mscrm-addons.com!

## 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
- No 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:



## ActivityTools (AT)

Add some Outlook-feeling to Microsoft Dynamics 365 activities

Get your FREE TRIAL on AppSource or on www.mscrm-addons.com!

## 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

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### ActivityTools is available for:





## **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:

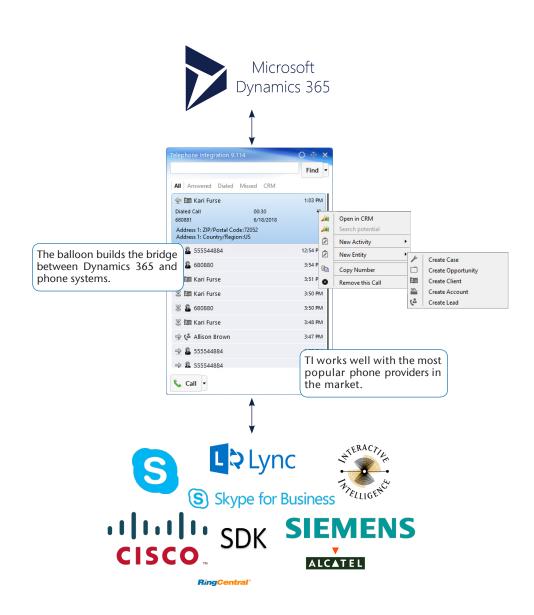
- **Click2Dial** on phone number or with a click on the 'Call number'-button in the command bar from within the balloon simply by entering the phone number
- 'Dialing from related records' enables you to call phone numbers from related records (e.g. call directly from an opportunity)

#### 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



TelephoneIntegration is available for:





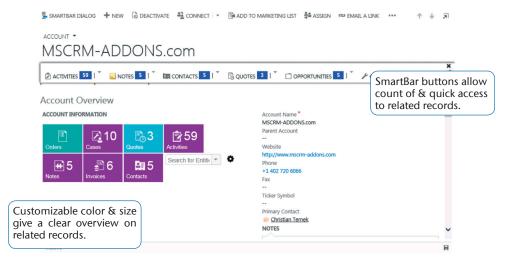
## SmartBar (SB)

Navigate in Microsoft Dynamics 365 like a pro

Get your FREE TRIAL on AppSource or on www.mscrm-addons.com!

## 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 guotes, 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)
- Show/Hide buttons based on count or field values



#### SmartBar is available for:



## **PowerSearch (PS)**

Finding records in Microsoft Dynamics 365 has never been easier

FREE TRIAL on AppSource or on www.mscrm-addons.com!

Get your

### 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

	Accounts Account Name Primary Contact	Cases Opportunities	Contacts	Leads Opportur ×	ity Products Activitie Created On Owner	s Email Messaç On Equals Current User	es Articles	of fields	that allo	ited number w a search in 5 entities.
	* Activ	e Accounts ×						Search Clear	8 Ø 8	
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	Alpine siti House (sa	mpie)	333-0157	Account Name	Alpine Ski House (sample)		Street 1	2313 B Southampton Rd		
				Email	someone8@example.com		City	Missoula		
				Main Phone	555-0157		State/Province	тх		
				Primary Contact	Paul Cannon (sample)		ZIP/Postal Code	58047		
				No. of Employees	4800		Country/Region	U.S.		
				Contacts: Active Con	tacts Subgrid View		Cases: All Cases			
				Full Name	Email		Case Title		Case Number	
				Patrick Sands (sample)	someone_k@example.com	1	Contact information	n requested (sample)	CAS-00004-V5D9P8	
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#### PowerSearch is available for:





## GroupCalendar (GC)

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

Get your FREE TRIAL on AppSource or on www.mscrm-addons.com!

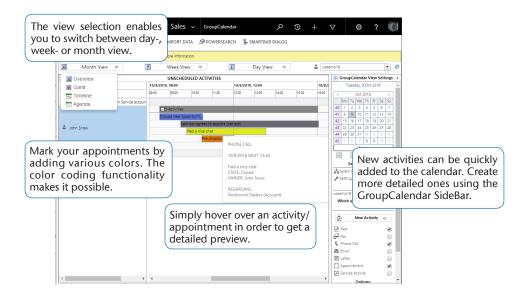
## Your benefits at a glance:

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



### GroupCalendar is available for:



## **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 onestop-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**

	Norma	al License <sup>*1</sup>	"PerUser" License <sup>*2</sup>		
Product	Price Support & Maint. *3		Price	Support & Maint. *3	
GroupCalendar (GC)	60€	14€	120€	28€	
ActivityTools (AT)	45€	14€	90€	28€	
PowerSearch (PS)	45€	14€	90€	28€	
SmartBar (SB)	25€	14€	x	х	
TelephoneIntegration (TI)	x	x	120€	28€	

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

### Subscription Prices \*4

	Normal	License*5	"PerUser" License*6		
Product	monthly annually		monthly	annually	
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€	х	х	
TelephoneIntegration (TI)	x	х	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 and PS require 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, GC, PS and SB require a minimum of 5)

\*6 ... "PerUser"-license: GC, AT, PS, and TI require a minimum amount of 10

## **Pricelist in EUR**

DocumentsCorePack (DCP)								
Package	Perpetua	l 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 requ	uest	on re	quest	on request			
Additional Packages								
1,000 documents	х		11€	11€ 7,50€		x		
1 Template Designer	60€	14€	7€	6€	x			

### AttachmentExtractor (AE)

Package	Perp	etual 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 / 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**

	Norma	al License <sup>*1</sup>	"PerUser" License <sup>*2</sup>		
Product	Price Support & Maint. *3		Price	Support & Maint. *3	
GroupCalendar (GC)	\$ 75	\$ 19	\$ 150	\$ 38	
ActivityTools (AT)	\$ 55	\$ 19	\$ 110	\$ 38	
PowerSearch (PS)	\$ 55	\$ 19	\$ 110	\$ 38	
SmartBar (SB)	\$ 30	\$ 19	x	х	
TelephoneIntegration (TI)	х	x	\$ 150	\$ 38	

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

### Subscription Prices \*4

	Normal	License*5	"PerUser" License <sup>*6</sup>		
Product	monthly	annually	monthly	annually	
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	х	x	
TelephoneIntegration (TI)	x	х	\$ 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 and PS require 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, GC, PS and SB require a minimum of 5)

\*6 ... "PerUser"-license: GC, AT, PS, and TI require a minimum amount of 10

## **Pricelist in USD**

DocumentsCorePack (DCP)						
Package	Perpetual License		Subscription			
	Price	Support*1	monthly	annually	Documents incl.	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 <i>,</i> 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		\$14	\$ 11	x	
1 Template Designer	\$ 75	\$ 19	\$ 9	\$ 8	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 <i>,</i> 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 / 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



### DocumentsCorePack

Professional document generation and processing in Dynamics 365



### GroupCalendar

Effective Scheduling of users, teams and resources in Dynamics 365



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!

### EUROPE

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