



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

Push the boundaries of
Microsoft Dynamics 365
with our addons!

PRODUCT
CATALOG

Product Catalog



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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.msccrm-addons.com!

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

PowerApps-Connector: The DocumentsCorePack connector for PowerAutomate and Canva Apps allows to utilize our document capabilities in your custom applications and background processes (Flows)

The screenshot shows the 'DocumentsCorePack Dialog' on the left and a generated email document on the right. The dialog has three steps: 'Let me decide every step (available for users)', 'send Quote', and 'Proposal'. A red arrow labeled '1Click' points from the 'send Quote' step to the email document. The email document is titled 'Please find your quote attached' and includes fields for Priority, Due, Status Reason, Owner, From, To, Cc, Bcc, and Subject. The 'Attachment' section shows a file named 'QUO-01000 (78).pdf'.

DocumentsCorePack Dialog
Generates a document based on the records data. [Click here to see how to create templates](#)

Let me decide every step (available for users)
Select this option to decide everything within this dialog by yourself.

send Quote
create Quote, email content, save to SharePoint and open in Microsoft Word

Proposal
select Documents and attach to nice email

Next Cancel

1Click

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

EMAIL
Please find your quote attached

Priority: Normal, Due: , Status Reason: Draft, Owner: John Snow

From: John Snow, To: Karl Furse, Cc: , Bcc: , Subject: Please find your quote attached

Attachment: File Name: QUO-01000 (78).pdf



Document Automation - Your benefits at a glance:

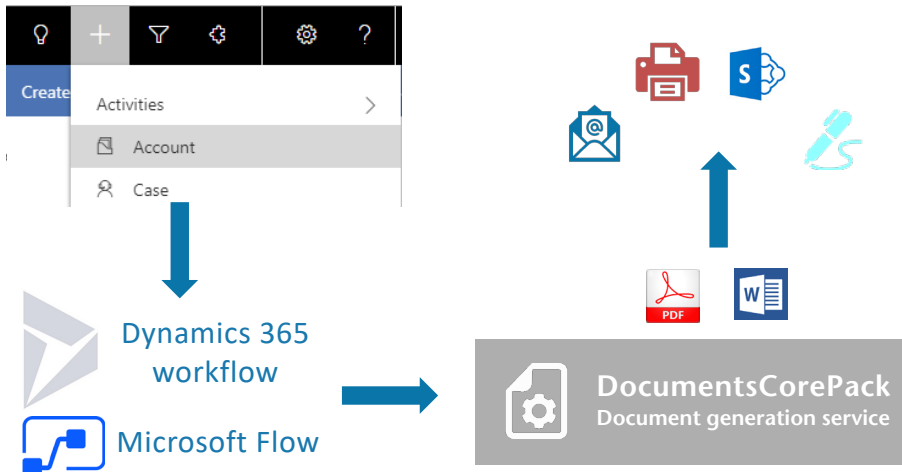
- **Dynamics 365 processes integration:** Automate your document processes via Dynamics 365 workflows or Microsoft Flow
- **Reducing your user's workload and standardizing your internal and external documents**
- **Scheduled reports** (daily, weekly, monthly)

Use cases:

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

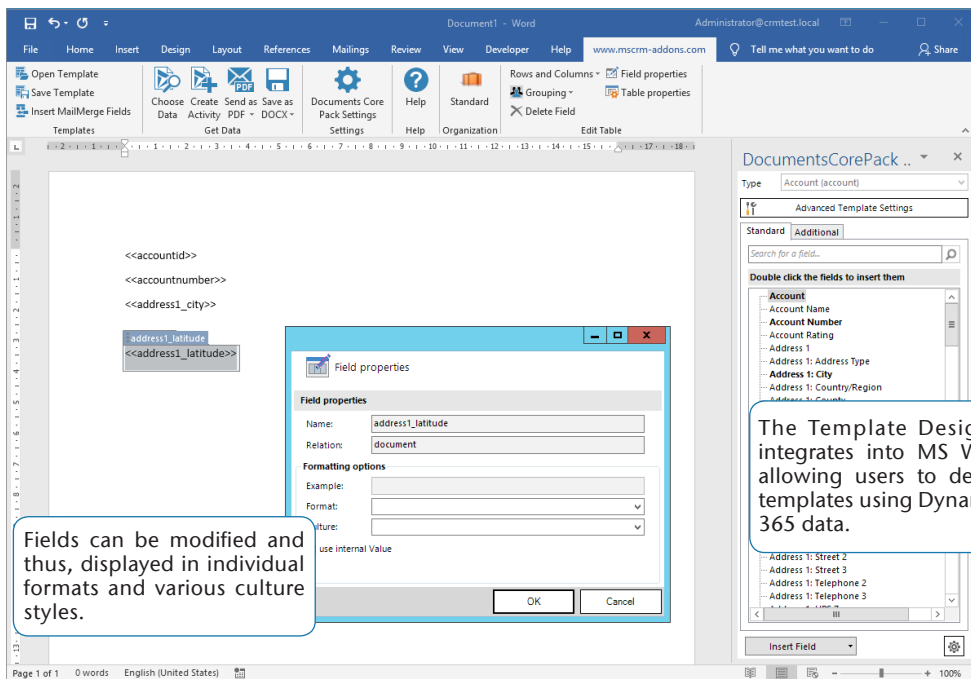
“We at Blanchard are very pleased with the product and would highly recommend mscrm-addons products to anyone looking for a robust yet flexible document merge and delivery solution.

Ed Glover, Blanchard Company, Inc



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)



DocumentsCorePack is available for:

Microsoft Dynamics 365, Microsoft CRM 2016, 2015, 2013, 2011 Online and On Premise



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, .txtdocx
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	✓	✗
<ul style="list-style-type: none"> 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

Get your
FREE TRIAL
on AppSource or on
www.msrm-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:

Microsoft Dynamics 365, Microsoft CRM 2016, 2015, 2013, 2011 Online and On Premise



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**

The screenshot shows the Dynamics 365 interface for 'Coho Winery'. The 'ActivityTools' pane is open, displaying a list of activities. The list is organized into sections: 'LAST WEEK' and 'TWO WEEKS AGO'. Each activity entry shows the sender (e.g., John Snow), the subject (e.g., 'Thank you for your request'), and the date. A callout box points to the 'Preview pane' on the right, which displays the content of the selected activity, including a 'Thank you for your request' message and contact details. Another callout box states: 'ActivityTools provides you with a list of all related activities. Create, search & filter activities from within the menu.'

ActivityTools is available for:

Microsoft Dynamics 365, Microsoft CRM 2016, 2015, 2013, 2011 Online and On Premise



Telephone Integration (TI)

Connect your phone system to Dynamics 365

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

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:

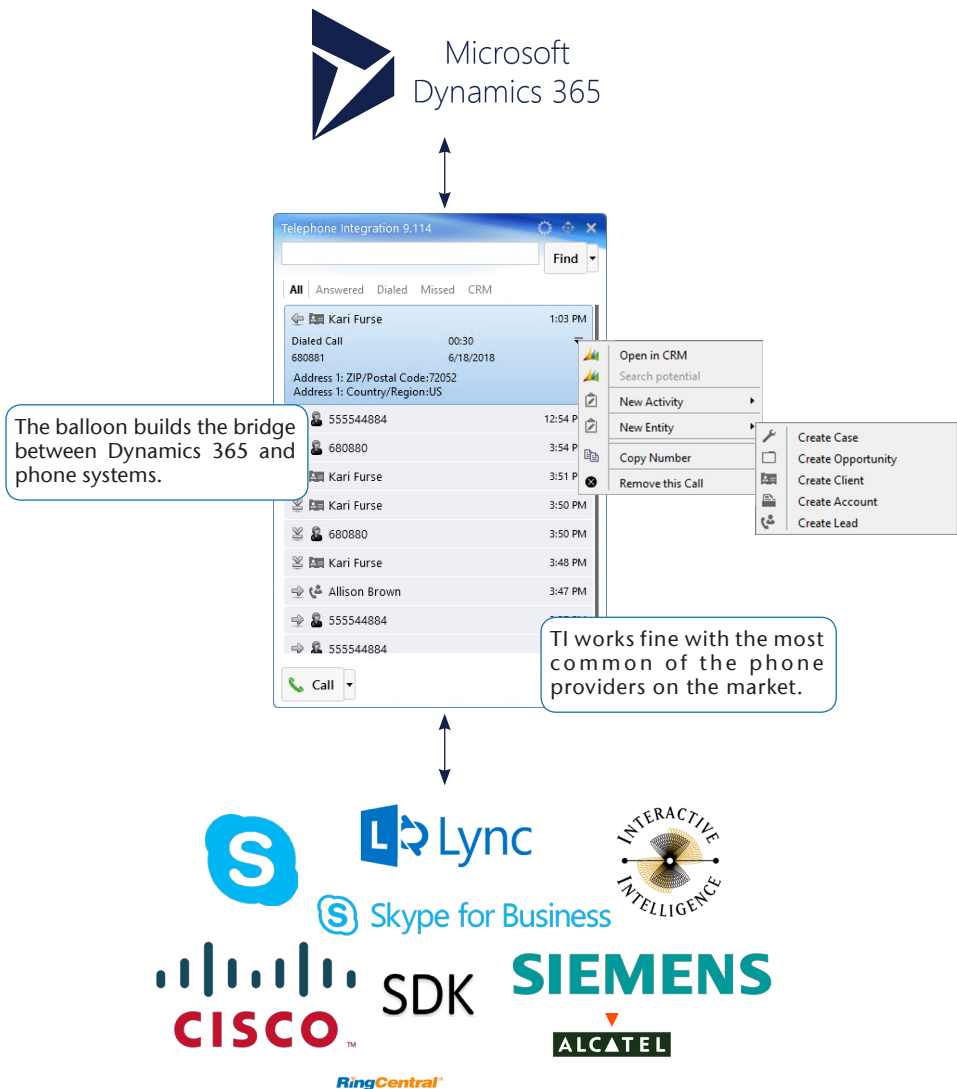
- **Click2Dial** on phone number or with a click on the 'Call number'-button in the command bar from within the balloon simply by entering the phone number
- **'Dialing from related records'** enables you to call phone numbers from related records (e.g. call directly from an opportunity)

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 enabled phone systems like Cisco, Alcatel, Siemens and many more
- RingCentral
- Interactive Intelligence



TelephoneIntegration is available for:

Microsoft Dynamics 365, Microsoft CRM 2016, 2015, 2013, 2011 Online and On Premise



SmartBar (SB)

Navigate in Microsoft Dynamics 365 like a pro

Get your
FREE TRIAL
on AppSource or on
www.msrm-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 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)
- **Show/Hide buttons** based on count or field values

SMARTBAR DIALOG + NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK

ACCOUNT

MSCRM-ADDONS.com

ACTIVITIES 59 | NOTES 5 | CONTACTS 5 | QUOTES 3 | OPPORTUNITIES 5

Account Overview

ACCOUNT INFORMATION

Orders	Cases 10	Quotes 3	Activities 59
Notes 5	Invoices 6	Contacts 5	

Search for Entity

Account Name*
MSCRM-ADDONS.com
Parent Account
Website
<http://www.msrm-addons.com>
Phone
+1 402 720 6066
Fax
Ticker Symbol
Primary Contact
Christian Ternek
NOTES

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 Dynamics 365, Microsoft CRM 2016, 2015, 2013, 2011 Online and On Premise



PowerSearch (PS)

Finding records in Microsoft Dynamics 365 has never been easier

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

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 Dynamics 365, Microsoft CRM 2016, 2015, 2013, 2011 Online and On Premise



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:

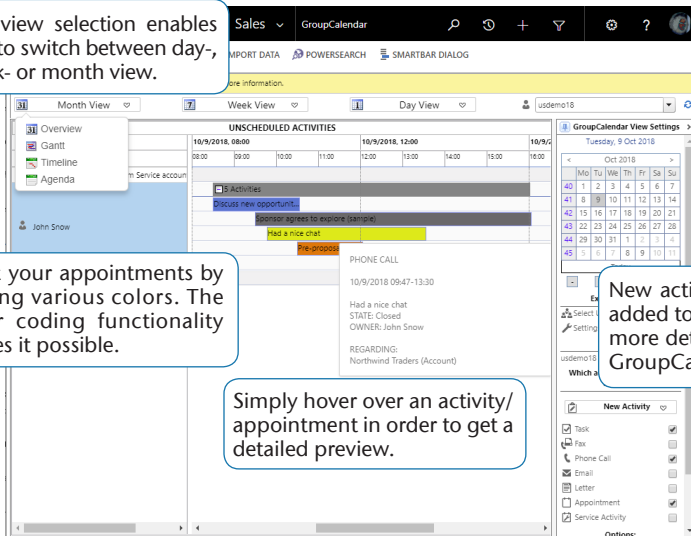
- All views available in day-, week- or month-view
- TopDown-view (like Outlook), List-view, Gantt-view, Timeline-view and Agenda-view

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.

Simply hover over an activity/appointment in order to get a detailed preview.

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



GroupCalendar is available for:

Microsoft Dynamics 365, Microsoft CRM 2016, 2015, 2013, 2011 Online and On Premise



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
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
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 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	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		11 €	7,50 €	x	
1 Template Designer	60 €	14 €	7 €	6 €	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
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
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 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)	\$ 6,800	\$ 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)	\$ 6,800	\$ 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



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!**

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or

appsource.microsoft.com

