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Your company for MS-CRM ADD-ONS!

# DocumentsCorePack - Getting started from the [www.mscrm-addons.com](http://www.mscrm-addons.com) website

June 2024

## Table of Contents

<b>SET UP A DOCUMENTSCOREPACK SERVICE .....</b>	<b>2</b>
<b>HOW TO USE DOCUMENTSCOREPACK .....</b>	<b>8</b>
<b>CREATE YOUR OWN TEMPLATES .....</b>	<b>12</b>
<b>LICENSE MANAGER.....</b>	<b>14</b>
<b>LIST OF FIGURES .....</b>	<b>14</b>

Thank you for your interest in DocumentsCorePack. 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 Document Generation for Microsoft Dynamics 365 Online without local installations. The service, as well as licensing, can be configured and maintained on our website.

To begin, please go to our [website](#) and simply **Get Started**.

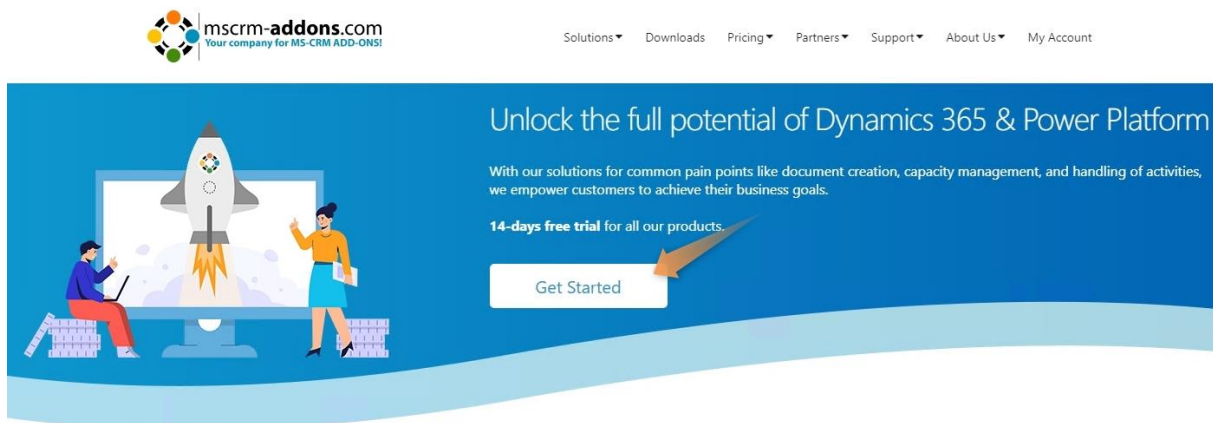


Figure 1: Get Started with DocumentsCorePack

To proceed, it is necessary to register or log in with an existing account to [www.mscrm-addons.com](http://www.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!](#)

To start the online configuration, select **1 DocumentsCorePack** from the Solutions page, and then **Start Free Trial** and **2 Start Configuration**.

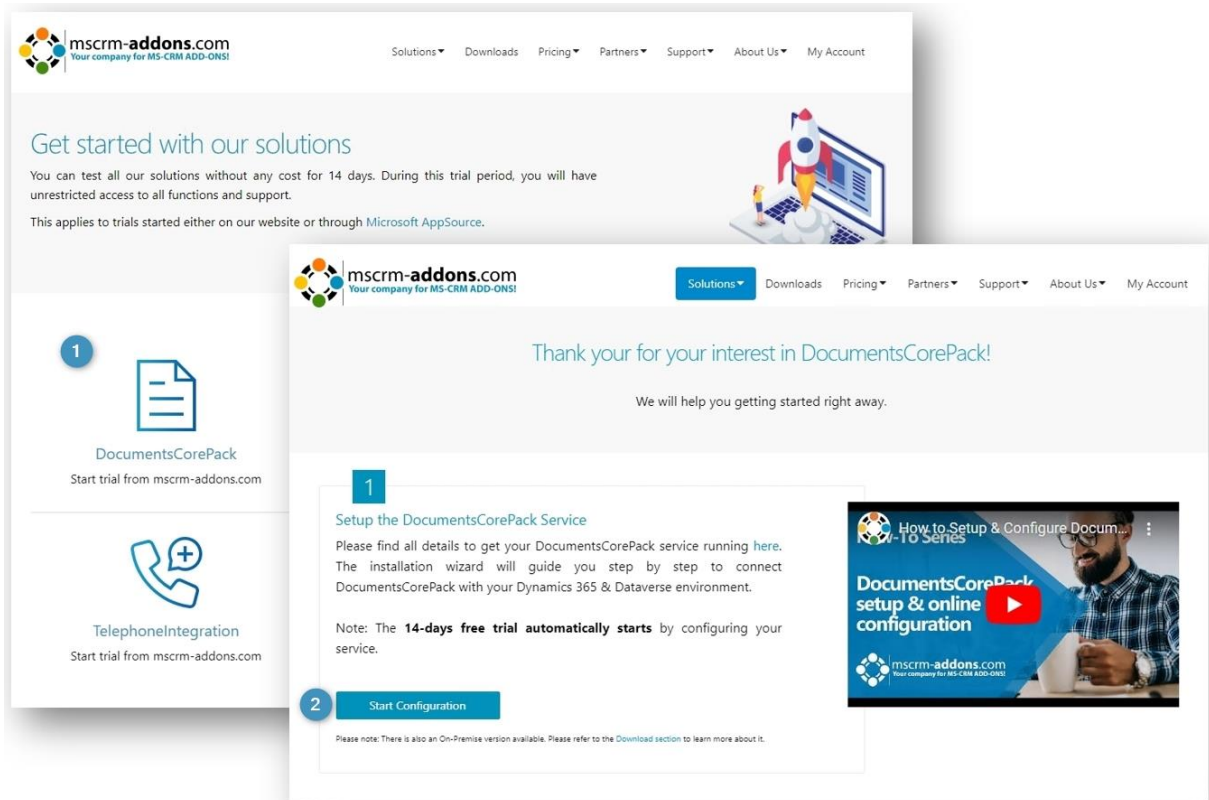


Figure 2: Registered on www.mscrm-addons.com and starting online configuration

## 1. Set up a DocumentsCorePack service

Once logged in, you will be provided with the Online Configuration window. You can set up a service by clicking the **+ Add Service** button, highlighted in the figure below. Decide here whether you need a DocumentsCorePack or AttachmentExtractor service.

If this is the first service that you are setting up, then DocumentsCorePack will already be selected.

**Please note:** System Customizer or System Administrator access is required.

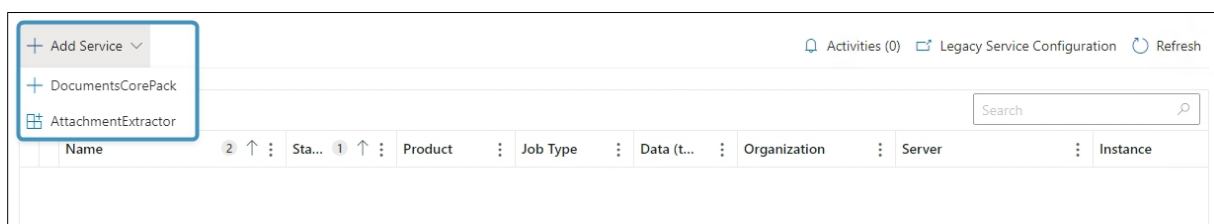
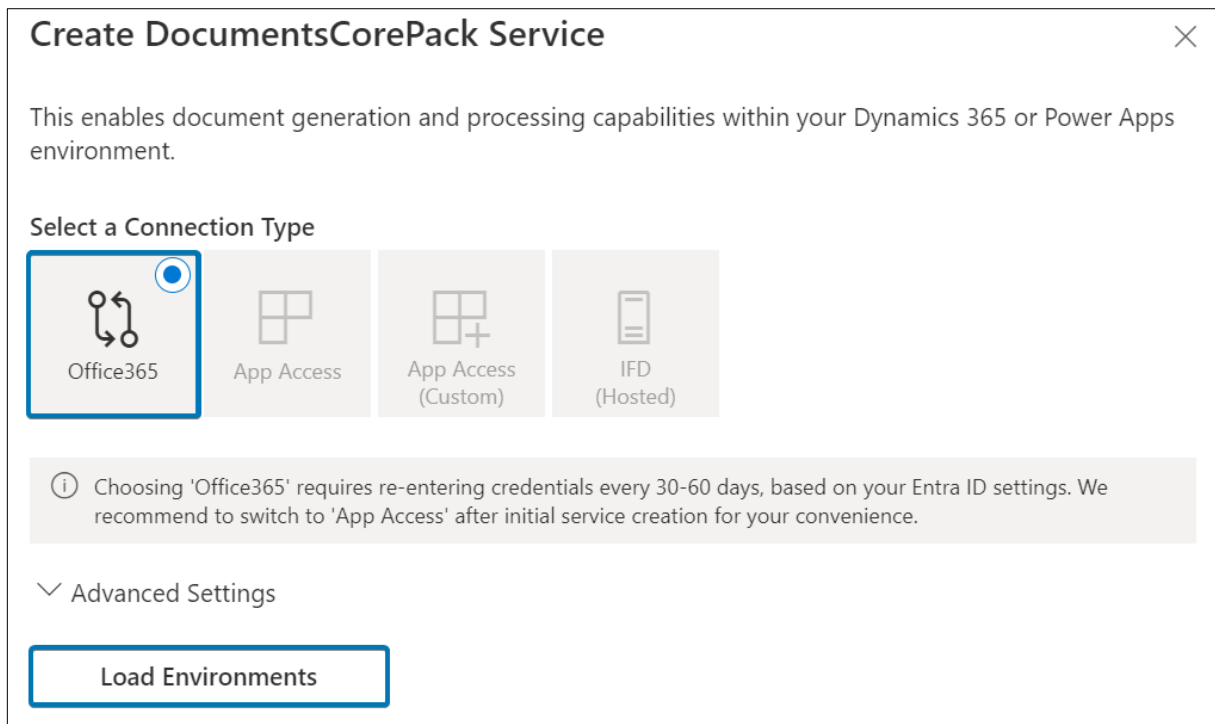


Figure 3: Add a DocumentsCorePack service

The Create DocumentsCorePack Service overview and service details are shown. To move forward, select the **Connection Type** and click on the **Load Environments** button.



**Create DocumentsCorePack Service** ✕

This enables document generation and processing capabilities within your Dynamics 365 or Power Apps environment.

Select a Connection Type

Office365  App Access  App Access (Custom)  IFD (Hosted)

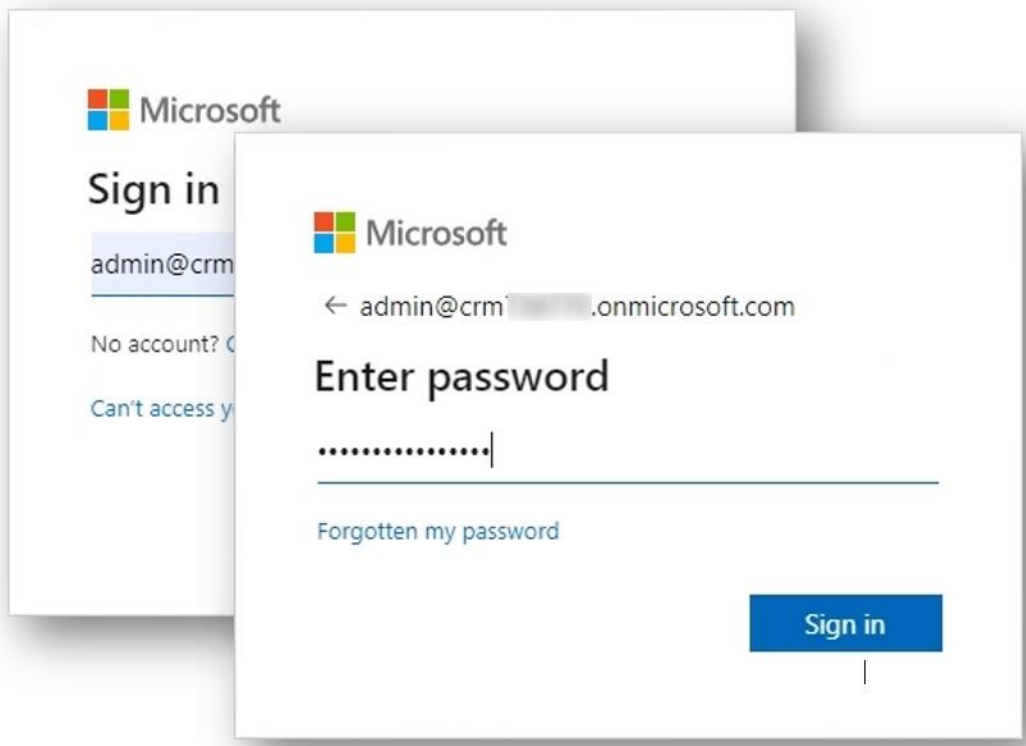
*i* Choosing 'Office365' requires re-entering credentials every 30-60 days, based on your Entra ID settings. We recommend to switch to 'App Access' after initial service creation for your convenience.

Advanced Settings

**Load Environments**

Figure 4: Connection profile

A login is required.



**Microsoft**

**Sign in**

admin@crm

No account? [Create one](#)

Can't access your account? [Get help](#)

**Microsoft**

← admin@crm[redacted].onmicrosoft.com

**Enter password**

.....|

[Forgotten my password](#)

**Sign in**

Figure 5: Login with your credentials

Accept the requested permissions.

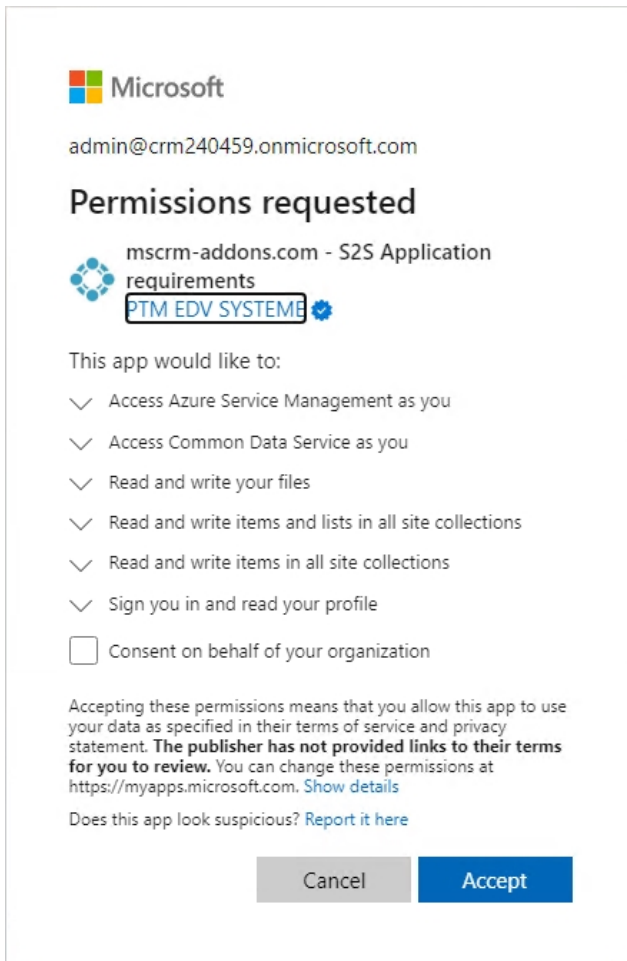



Figure 6: Accept requested permissions


Your permissions will then be verified, which may take a few seconds. Then your organization will be shown. Continue with **Connect**.


## Create DocumentsCorePack Service ✕


This enables document generation and processing capabilities within your Dynamics 365 or Power Apps environment.

Select a Connection Type

  
 Office365

  
 App Access

  
 App Access  
(Custom)

  
 IFD  
(Hosted)

↻ Reset Connection

### Available Environments

PTM EDV Systeme GmbH (default)	<a href="https://org129015cf.crm4.dynamics.c...">https://org129015cf.crm4.dynamics.c...</a>	<a href="#" style="background-color: #0070c0; color: white; padding: 5px 10px;">Connect</a>
PTM EDV Systeme GmbH (DEV & TimeAttendant)	<a href="https://mscrm-addon...">https://mscrm-addon...</a>	<a href="#" style="background-color: #0070c0; color: white; padding: 5px 10px;">Connect</a>
PTM EDV Systeme(Production)	<a href="https://mscrmaddons.crm4.dynamics.com">https://mscrmaddons.crm4.dynamics.com</a>	<a href="#" style="background-color: #0070c0; color: white; padding: 5px 10px;">Connect</a>
Sales Trial	<a href="https://org40339d79.crm4.dynamics.com">https://org40339d79.crm4.dynamics.com</a>	<a href="#" style="background-color: #0070c0; color: white; padding: 5px 10px;">Connect</a>

Figure 7: Connect to environment

Now the **Service Configuration** will be displayed, and you can view/configure the Service details.

- 1 **Service Name:** After your connection is set up, a Service Name is required. Select a unique service name and know that it cannot be changed once set.
- 2 **DocumentsCorePack Instance:** Select which instance the DocumentsCorePack Service should run. The instance with the highest bandwidth is automatically selected for you, but you can change this as desired.
- 3 **SharePoint:** Find an overview of your SharePoint connection here. You can edit or remove the connection.
- 4 **Use Dynamics 365 Integrated SharePoint:** Enable this setting when the documents should be stored in the Dynamics 365 integrated SharePoint. Otherwise, the documents will be stored as note attachments.

## Create DocumentsCorePack Service ✕

Service Name 1

DocumentsCorePack Data Center 2

SharePoint 3

Use Dynamics 365 Integrated SharePoint 4

▼ Advanced Settings




Figure 8: Service Configuration overview

There are additional options to configure under the Advanced Settings drop-down, as outlined below.

- 1 **Enable Debugging:** In case of any issues during document generation, we recommend you enable debugging here. The log files will be available as soon as the service is saved.
- 2 **Job Type:** Select between **Document Creation**, **Print Jobs** or **Both**.
- 3 **SharePoint Single Location:** Specify here a SharePoint location for document edits even when no integrated SharePoint is enabled within Dynamics 365.
- 4 **Use SharePoint Compatibility Connection:** If you select this option a SharePoint Compatibility Connection will be used.
- 5 **Notify service changes immediately:** To avoid false positives, we send out E-mails after 30 minutes if there is still an issue with the service. Select this option to receive an email immediately if there is an issue with your service.
- 6 **Only document-generating service:** If you select this option, this will be the only service which processes your documents.
- 7 **FIPS Compliance Required:** Enable this setting for DocumentsCorePack Template Designer installations in FIPS-enabled environments.



- 8 Skip Solution Import:** If you select this option, the setup will assume that you have already imported all solutions that are necessary for the creation of a service. If a particular solution is missing, the creation of the new service will fail.
- 9 Skip Role Assignment:** If you select this option, you either must create a custom role covering the required rights or you will have to manually assign the security roles.
- 10 Synchronous solution import:** If you select this option, the setup will try to import the solutions synchronously.

### Create DocumentsCorePack Service ✕

Enable Debugging 1

Job Type 2 Document Generation ▾

SharePoint Single Location 3 Location

Use SharePoint Compatibility Connection 4


Notify on service changes immediately 5

Only document-generating service 6

FIPS Compliance Required 7

Skip Solution Import 8

Skip Role Assignment 9



↻ Change Connection Profile
Create Service

Figure 9: Service Configuration overview – Advanced Settings

Once you have finished configuring all service details and desired advanced settings, select the **Create** button to finish creating the service. The service can take up to half an hour to create, but once completed, you can view it in the service list.

Name	Status	Product	Job Type	Data (t...	Environme...	Dataverse URL	Instance
unq50da87e8ab24ee118475000d3a	Stopped	DocumentsCor...	Document Genera	0 Docs	CRM738936		US EAST Public
unqef434b4479094a9d8092cda1782	Stopped	AttachmentExtr...	Move	0 B	Marketing-Testversion		AE UK West
unq0b31883536d6ee119048000d3a	Stopped	DocumentsCor...	Document Genera	0 Docs	Sales Trial		US EAST Public
unqb71cf8a72bf2ee119048000d3a3	Running	DocumentsCor...	Document Genera	5 Docs	Sales Trial		US EAST Public

Figure 10: Service Configuration overview

## 2. How to use DocumentsCorePack

DocumentsCorePack allows for quick and seamless document generation with Dynamics 365 data for any industry. Along with generating documents, DocumentsCorePack allows for the processing of documents (e.g., attach and send documents, begin an E-signature process, concatenate documents, and more).

With the [DocumentsCorePack \(DCP\) dialog](#), you can perform such document processes with ease. The dialog guides users through the document generation process and offers a variety of options to process the document.

### Step-by-step description

**Step 1:** Once the Add-On is installed click on the **Create Document** button in the Dynamics 365 Command Bar to open it.

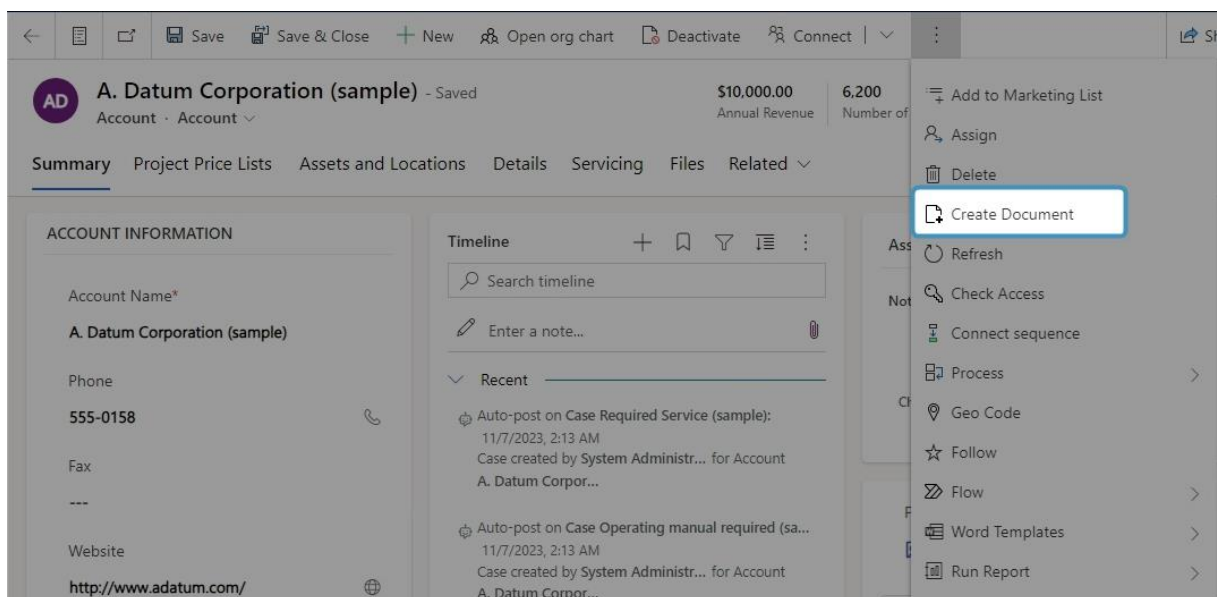


Figure 11: The Create Document button in Dynamics 365


**Step 2:** The DocumentsCorePack Dialog opens. Select a template that you want to process.





**Please note:** You must do this from the record you want to generate the document for. In our case, we are starting from an account.

If you have created a One-Click-Action, your dialog might look different at this point. Continue on with **Let me decide every step**.

## DocumentsCorePack Dialog

Select your document template. [Click here](#) to see how to create templates.

Search for templates  

General    

Name	Category	Group
Account Reconnect.docx		General
Account_Overview.docx		General
Account_QR_Template.docx		General
Contemporary Letter.docx		General
List of Accounts related to this Account.docx		General
List of Contacts related to this Account.docx		General

Figure 12: Manual process option

**Step 3:** Select the file type, how the document should be attached, if it should be printed, and if a workflow or action should run.

## DocumentsCorePack Dialog

Define your document process. [Click here](#) to learn about One-Click Actions.

Filetype	pdf ▼
<input checked="" type="checkbox"/> Attach document	as note ▼
<input type="checkbox"/> Print document	You have no printer configurations ▼
<input type="checkbox"/> Run workflow	You have no workflows ▼
<input type="checkbox"/> Run action	▼

[Create Document >](#)

Figure 13: Define document process

**Step 4:** Before finishing the process, it is possible to preview the document.

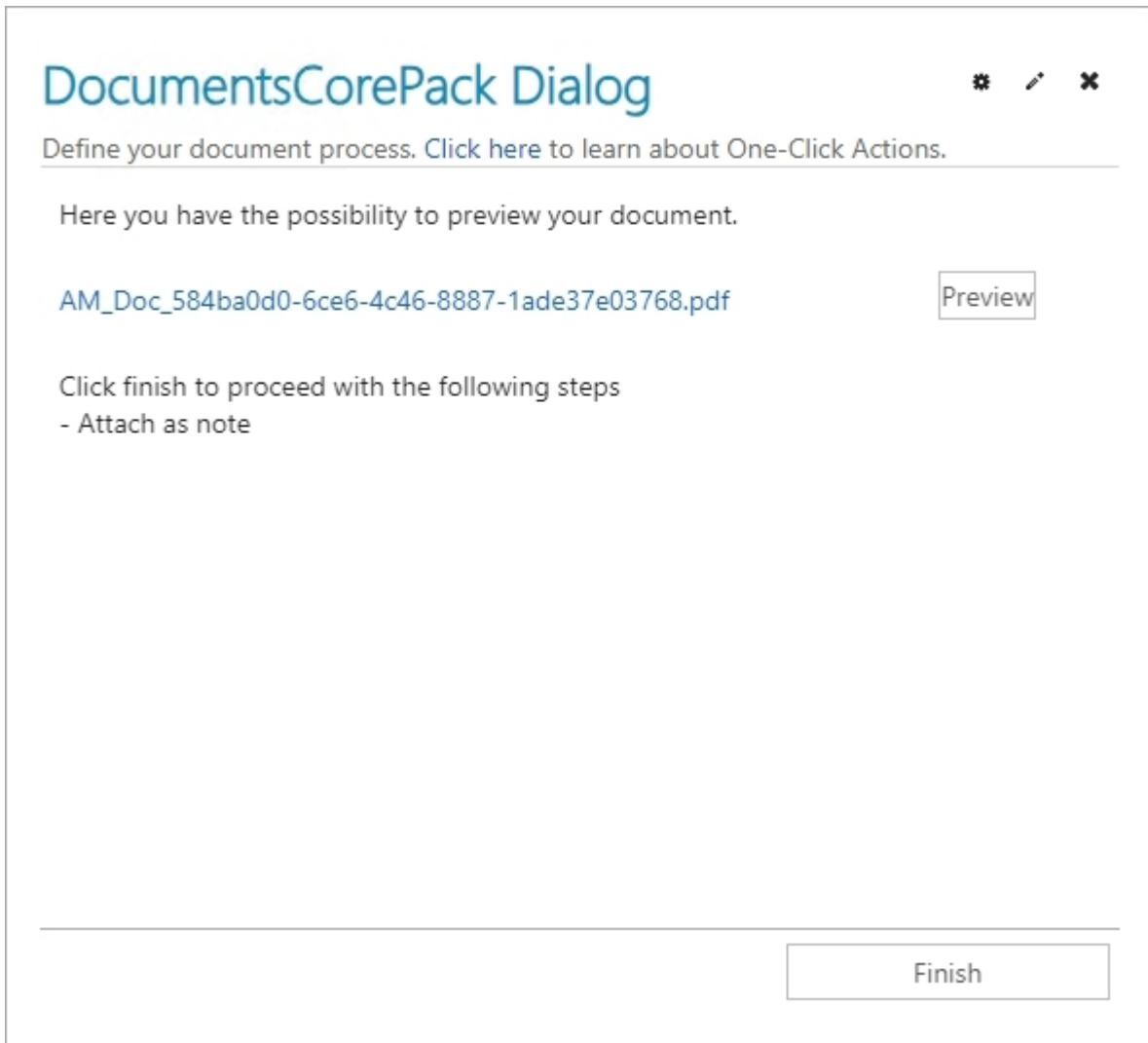


Figure 14: Preview the document

**Step 5:** Now click **Finish** to complete the process. Congratulations, you created your first document.

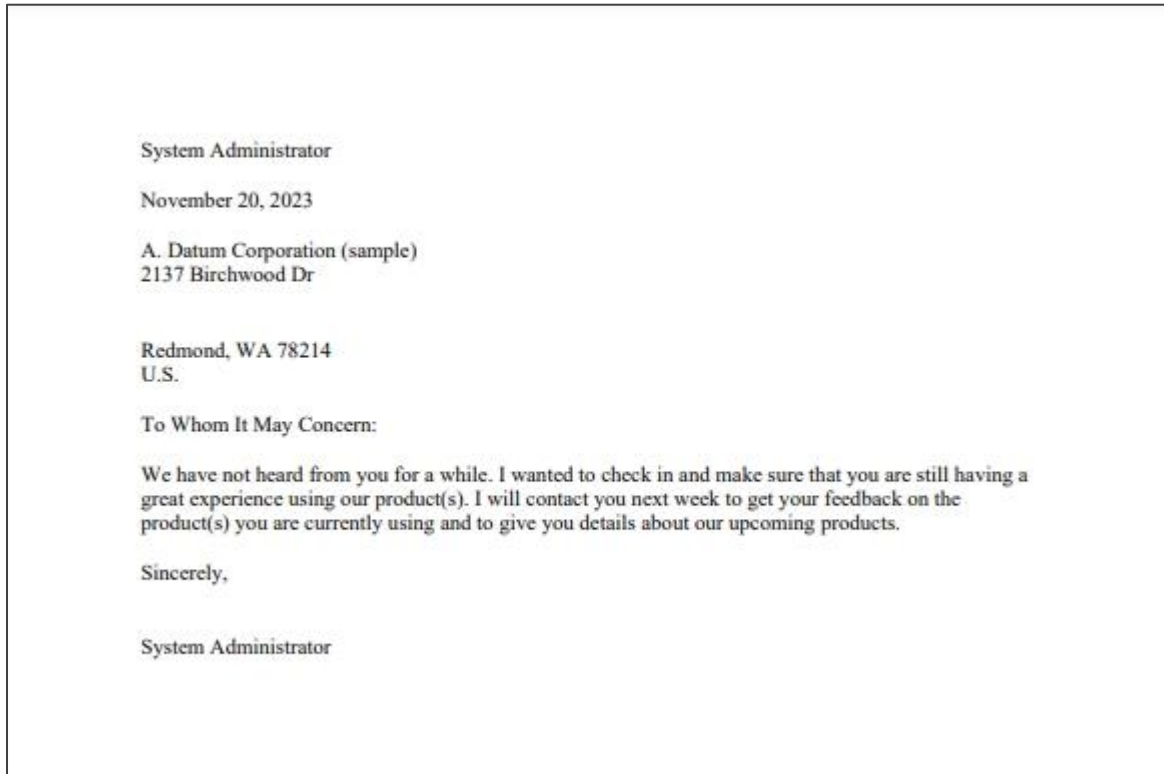


Figure 15: Letter created via Create Document button

## Create your own templates

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

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

The DocumentsCorePack Template Designer can be easily accessed via the **www.mscrm-addons.com** tab in the Microsoft Word command bar, as you can see in the figure below, and provides you with many options that facilitate the creation of templates.

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

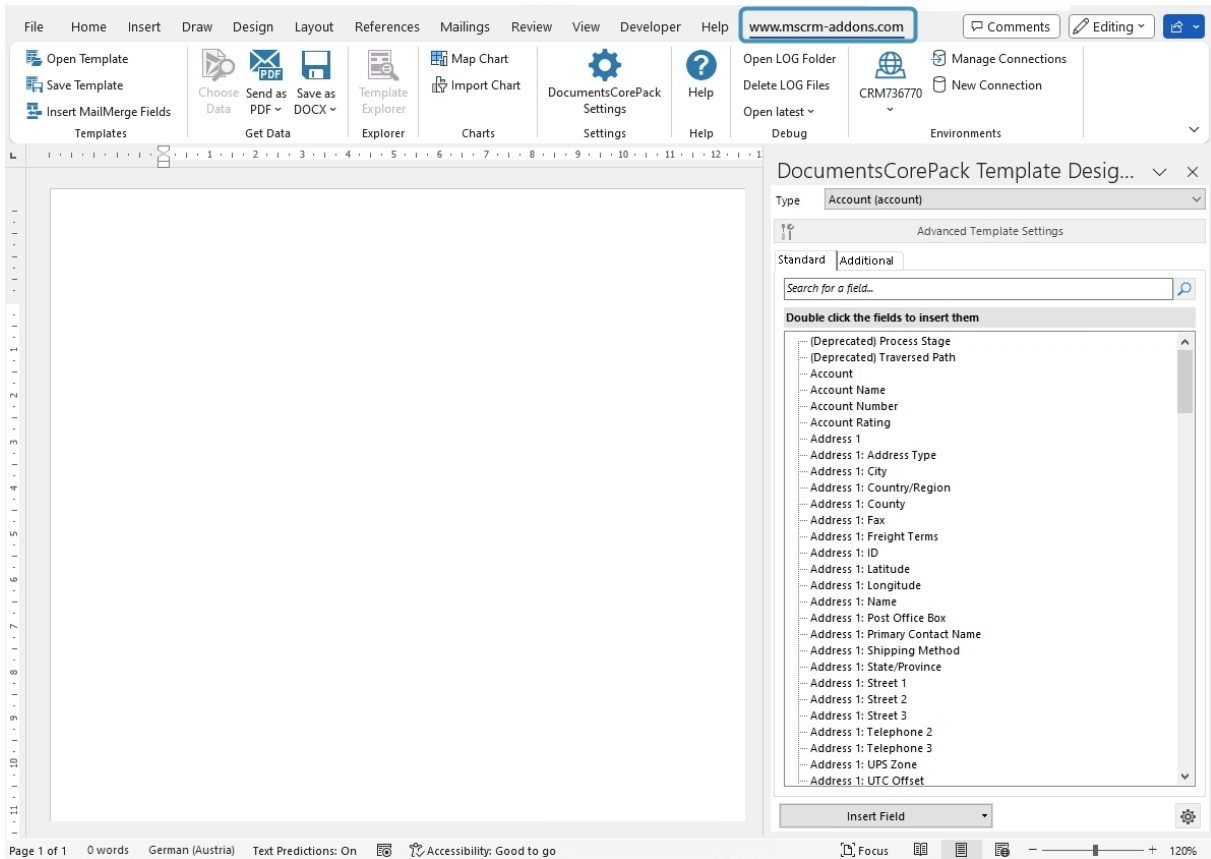


Figure 16: Microsoft Word with integrated DocumentsCorePack TemplateDesigner

## License Manager

DocumentsCorePack comes with a **14-days trial license**. Once you receive the license from our support-team, just 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.

## List of Figures

Figure 1: Registered on <a href="http://www.mscrm-addons.com">www.mscrm-addons.com</a> and starting online configuration	4
Figure 2: Add a DocumentsCorePack service .....	5
Figure 3: Connection profile .....	5
Figure 4: Login with credentials .....	6
Figure 5: Accept required permissions .....	7
Figure 6: Connect to an environment .....	7
Figure 7: Service Configuration overview .....	8
Figure 8: Service Configuration – Additional Settings overview .....	9
Figure 9: Final configured service .....	10