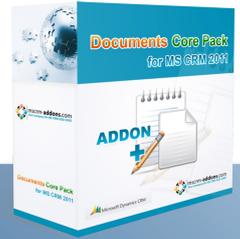


DocumentsCorePack

for MS Dynamics CRM 2011



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Your company for MS-CRM ADD-ONS!



DocumentsCorePack provides the possibility to create documents (Doc, DocX, PDF, ...) with data from CRM and to manage them in a structured and comfortable way. The addon is capable of resolving any relationship and works with standard- as well as custom entities. Therefore, it is a useful tool to create and manage for example quotes, invoices and other complex documents.

Create and store documents

WordMailMerge

This functionality enables the creation of Word-Documents with data from MS CRM. It is possible to resolve complex relationships and therefore our DocumentsCorePack provides the opportunity to e.g. create quotes, invoices etc. including data from related records like "other contacts", accounts, products, etc.

Activity creation

DocumentsCorePack enables users to create letter-, e-mail- or fax-activities with the generated document as an attachment. Users can furthermore save a document directly to the proper location in CRM without the need of generating an activity due to the "Save as DOCX"-functionality.

Send/Save as PDF, XPS, Doc, DocX, ODT

DocumentsCorePack provides the possibility to convert the generated documents into the listed file formats and to send them afterwards to customers or partners. Therefore, it provides a powerful option to simplify accounting by handling invoices, quotes, orders, etc. more easily.

Office Open XML (DocX)

With DocX a new technique for creating templates has been implemented. It brings up several advantages like the automated creation of tables and an easy insertion of other documents or pictures from CRM.

Bulk merge functionality for DocX templates

allows to generate and store multiple documents in a single mailmerge process. Additionally, the wizard provides several options like combining documents, printing them or generating activities.

Document Management

SharePoint integration

With the possibility to link DocumentsCorePack with the CRM-SharePoint-integration, generated documents can be stored in a structured way. Documents are automatically stored to the specific folders that are related to the CRM records that have been used in the merge-process.

Microsoft Windows Explorer Integration

The SharePoint functionality is also available for the Windows explorer. This allows creating a structured file system of documents associated with CRM without the need to use SharePoint services.

Document Summary

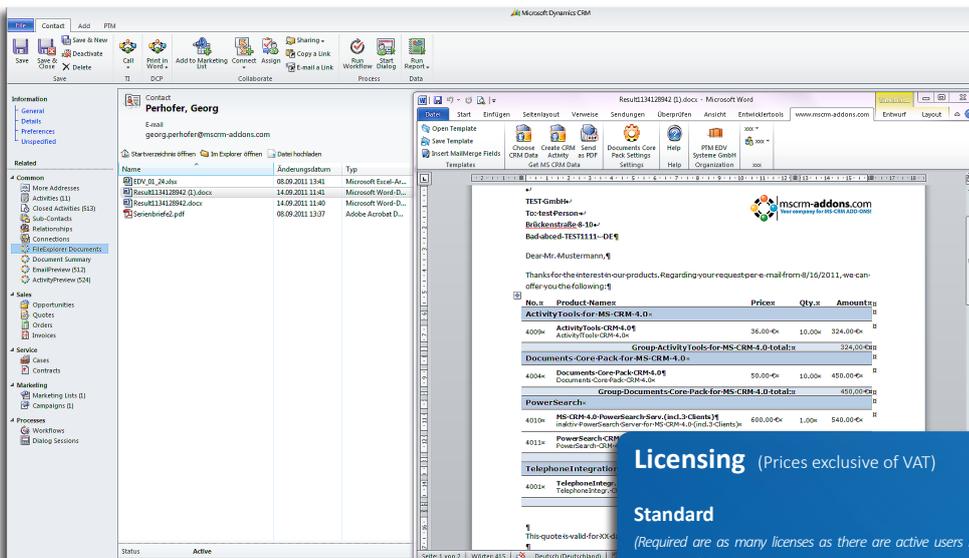
The Document Summary is a tool to show all documents and records (cases, quotes, invoices, ...) related to a specific CRM record (e.g. account, contact, ...).

Offline-capability

DocumentsCorePack can be used without any restrictions in the CRM offline mode. All created documents are saved on the client's temporary and synchronized when the user goes online again.

Availability

- MS Dynamics CRM 2011
- On-Premise (RTM)
- Hosted (IFD)
- Online (RTW)



Licensing (Prices exclusive of VAT)

	Standard	Per User
	(Required are as many licenses as there are active users in CRM)	(min. 10 users)
User license:	55€	User license: 110€
Annual support:	11€	Annual support: 22€



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