DocumentsCorePack

for MS CRM 2013

Differences between

Server and/or Client Based
Document Generation & Processing

August 2014

Server and/or Client Based Information

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1   In General

This guide contains information about all features and capabilities provided by **DocumentsCorePack Server and or Client Based Document Generation & Processing**. If you need you reach us, please take a look at the [contact page](#).

2   Important Information

In order to simply handling, AutoMerge for MS CRM 2013 is now renamed **DocumentsCorePack Server Based Document Generation** and is part of DocumentsCorePack for MS CRM 2013.

> Accordingly, **DocumentsCorePack for MS CRM 2013** now comes with all tools for:
>
> - [Server Based](#) (formerly AutoMerge) and/or
>
> - [Client Based](#) document generation & [processing](#) based on MS CRM data

Creating documents based on CRM data has never been easier. Depending on the license bought, the **Server Based and/or Client Based Document Generation** provide you with a set of tools to create and process documents inside CRM with a few clicks.

3 DocumentsCorePack Server Based Document Generation

Use the "CommandBar"-integration of the server based document generation (formerly AutoMerge) to generate and process documents in the most efficient way.

- *There is no need for a client installation*

  All documents are generated on the server and users can trigger a document generation from a tablet, phone or any other device with CRM-connection.

- *The "Create Document"-button*

  The CRM custom dialog allows users a quick & easy document generation and processing on single and or multiple records with the data from the selected record and template.

- *MS CRM process-integration*

  Document operations can be performed in workflows (multi-record-task) or dialogs (single record task).

- *Single set of both, server and client-based document generation*

  The MS Word integrated "Template Designer" allows to easily generate templates supporting all MS CRM fields.

- *Automatically print the document in a workflow*

  Documents can be printed via a local printer on which the service is installed or via a google Cloud Printer.

- *Online Service Configuration*

  For MS CRM Online, the web-based setup allows you to install and configure server based document generation online. There is no need for you to have a physical server. For detailed information, please read chapter 3.1.

3.1   Online Service Configuration

The web-based setup allows users to configure DocumentsCorePack Server Based for MS CRM Online without any local installations. The service as well as licensing can be configured and maintained on our website. (Only available for MS CRM 2013 Online (RTW) / Hosted (IFD)).

For detailed information for On-Premise Installations please read our DocumentsCorePack Installation Guide for MS CRM 2013, chapter 7 Service Configuration for DocumentsCorePack.

Follow the links listed below for detailed information:

- Start Trial/Configure Services for MS CRM Online.
- Watch our Online Service Configuration YouTube Video.
- Online Service Configuration User Guide.

4 DocumentsCorePack Client Based Document Generation

The client based document generation provides the possibility to generate the document in MS Word. This allows users to edit the document before it is sent or saved back to CRM with the MS Word integrated "www.mscrm-addons.com"-tab

- *Edit and modify the document*
  The result of the generated document can be opened and modified very easily. All MS Word formatting options are supported.

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

- *Bulk merge functionality*
  Users can create multiple documents all at once providing several possibilities after the document generation such as:

  - Combining all generated documents to a single one whilst maintaining the page numbering
  - Sending the documents to a printer
  - Creating activities with the generated documents as attachments

- *Fully integrated into MS Office*
  DocumentsCorePack Client integrates into MS Word and MS Outlook. The MS Word generated document can be processed via different activities or saved back to CRM in various file formats. The MS Outlook integration allows to easily sending quotes as pdf and the email will be prepared for the user.

- *Supported formats*: docx, pdf, xps, doc, odt

5   Server and Client Based Template Design & Document Features

There are a bunch of template design & document features provided by the server and or client based document generation. All features help users to maximize output by reducing time and optimizing business processes.

- *All DocumentsCorePack Client Templates are based on MS Word*

  Templates can be used without specific programming knowledge. It's easy to do with no limitation on Word formatting. Compatibility: MS Office 2003 / 2007 / 2010 / 2013.

- *Generate complex documents*

  Users can utilize all, standard, custom and system fields from CRM. There is no limitation on the number of CRM-fields.

- *Use fields from look-ups and One-to-Many relationships*

  DocumentsCorePack Client supports all MS CRM relation-types. E.g. it is possible to use fields from the potential customer of a quote and go further and retrieve information of the primary contact. It is supported to go up to 10 levels deep.

- *Dynamically generate filenames, subject of an activity or save locations*

  Define in the template a dynamically generated document/filename, or define a specific subject name of the activity generated with that document.

- *Tables of related records can also be inserted*

  Automatically insert tables for One:Many and Many:Many relationships like a list of quote products of a quote.

- *Take advantage of various template capabilities*

  Users can easily insert pictures, QR-codes, password-protection, HTML … based on CRM data.

- *Supported file formats*

  Server-Based: docx, pdf, doc, text, html, xps, png , jpeg, epub, bmp.

  Client-Based: docx, pdf, xps, doc, odt.

6   Actions available after the Document Generation

Once the document is generated, users have different possibilities for processing.

- *Save documents to MS SharePoint*

  Generated documents can be automatically stored in the associated SharePoint Location, MS CRM or any other location defined in the template.

- *Attach documents to CRM records*

  This is done automatically which enables users to attach the document to an email or any other CRM entity.

- *Print the generated document*

  Documents can be printed via a local printer and/or a Google-Cloud-printer.

- *Windows Explorer Integration*

  This feature is only provided in the MS CRM On-Premise version. The FileExplorer integration provided by DocumentsCorePack Client generates a separate folder for each record and gives you so a structured and easy way to add files/shares to your records in CRM.

- *Send emails with document attached or set as email content*

  DocumentsCorePack provides several different mailing features including:
  - send documents attached to an email as pdf, docx, txt, png, jpg…
  - place the content of the document as email content.
  - automated mailing by making use of the server-based tools.

- *Supported file formats*

  Server Based: docx, pdf, doc, text, html, xps, png, jpeg, epub, bmp.

  Client Based: docx, pdf, xps, doc, odt.

7 Licensing Information

Licensing possibilities

Depending on your needs we offer **Server-** and/or **Client-** licenses. If you answer the following questions with "Yes" you need **Server-Based** Document generation license:

1. Do you want to generate documents based on a workflow or dialog?
2. Do you want to avoid the installation of a client based software on all your users machines?

If you answer the following questions with "Yes" you need a **Client-Based** Document generation license:

1. You want to generate the document in MS Word to confirm or modify before processing?
2. You need to generate documents offline?

7.1 License for Server-Based document generation

The license for the Server-Based document generation is based on the amount of active users in your CRM. The Server-Based license always comes with one Template Designer license. If you need more, you can purchase additional DocumentCorePack Client licenses.

We have two ways to license the Saver-Based document generation:

1. **Online Subscription**

    This is the correct licensing method if you have CRM Online and don't want to install anything locally on your environment. Depending on the size of your MS CRM Organization you can decide between Small, Medium, Large and Enterprise. Details can be found [here](#).

2. **On-Premise purchase**

    This version can be installed on your CRM server (On-Premise or IFD). Depending on the size of your MS CRM Organization you can decide between the different packages. You can find the prices in the navigation on left.

7.2 License for Client-Based document generation

You can license the "Client-Based" document generation in two different ways.
Normal license: Requires as many licenses as there are active users in CRM.
Per User license: If you do not want to purchase a license for all your users you should take the per user model. The limitation you have with this model is that you have to purchase initially at least 10 licenses.

Depending on your needs, we offer Server-and/Or Client Based document generation licenses. The licenses for server based document generation are based on the amount of active CRM users. The server based licenses always comes with one Template Designer license. If you need more, you can purchase additional DocumentsCorePack Client licenses.

- Normal license: Requires as many licenses as there are active CRM users
- Per User License: This model starts with an amount of at least 10 licenses. We recommend this model if you do not want to purchase a license for all your users.

For detailed information, please have a look at our DocumentsCorePack product page.

8 Contact

If you have questions to the product send an email to
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http://blogs.mscrm-addons.com

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