

DocumentsCorePack Getting Started from Appsource

v.1.0, June 2021

Hello! Thank you for your interest in <u>DocumentsCorePack</u>. You can now use the Microsoft Power Platform admin center to install, configure, and manage Dynamics 365 apps such as all *mscrm-addons.com* products that run on Microsoft Dataverse. Follow the way to install DocumentsCorePack from <u>Microsoft Power</u> <u>Platform admin</u> center:

Open the <u>Microsoft AppSource</u> and enter in the search field "*mscrm-addons.com*". All *mscrm-addons* products are shown.

ng 8 results in apps View 2 rela	ted results in consulting services						
ers	All results (8)						
O Search filters					۲	(1)	((()
Categories Industries	Group Calendar: Professional Scheduling By mscm-#ddow.com (PTM EDV Syst	Telephone Integration: Phone connected to By mscm-addons.com (PTM EDV Syst	Documents Core Pack: Document automation By msom-addons.com (PTM EDV Syst	SmartBar: Effective navigation and record By mscm-addons.com (PTM EDV Syst	ActivityTools: Simple email and activity By mscm-addons.com (PTM EDV Syst	Attachment Extractor: Move content out of By macm-addons.com (PTM EDV Syst	Power Search: A simple advanced find By mscrm-addons.com (PTM EDV S
Products	Professional scheduling in Dynamics 365: Overview of tea	Apps Connect your phone to Dynamics 365 to get Click-2-Dial, Caller	Apps Document generation, processing and automation in	Simplify the navigation in Dynamics 365 and facilitate the	Get an Outlook look & feel experience when dealing with	Apps Save money and Dynamics 365 data storage by moving e-mail	Combining the simplicity of t Dynamics 365 search with the capabilities of the Advanced.
Pricing Model	*****	****(12)	*****(27)	*****	****	****	
latings	Free trial	Free trial	Free trial	Free trial	Free trial	Free trial	Free trial

Figure 1: AppSource - mscrm-addons.com

Select "DocumentsCorePack: Document automation" and click on the "Free trial".

(Si)	Documents Core Pack: Document automation
	📜 Dynamics 365 Marketing 🔮 Dynamics 365 Sales 💜 Dynamics 365 Customer Service 🜼 Dyn
	Free trial 🛛 🛱 Preferred solution
	$\star \star \star \star \star \star 4.9$ (27 Ratings)
	Free trial 54 Save to my list
Overview Reviews	s Details + support
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Overview Reviews Document generati Word Documents are crucial internal reports or con requirements. How it works? The 'Dialog': Accessibl	be from the command bar, the dialog enables users to generate and process documents in 3 simple
Overview Reviews Document generation Word Documents are crucial internal reports or con- requirements. How it works? The 'Dialog': Accessible steps:	be from the command bar, the dialog enables users to generate and process documents in 3 simple
Overview Reviews Document generation Word Documents are crucial internal reports or con- requirements. How it works? The 'Dialog': Accessibilis steps: • Select report	5 Details + support 5 ion, processing and automation in Dynamics 365 & Template Design based on MS 1 in every Dynamics 365 implementation. Whether you need to send sales or service documents, 1 tracts for signing, DocumentsCorePack will help you streamline and simplify your document 1 le from the command bar, the dialog enables users to generate and process documents in 3 simple
Overview Reviews Document generation Word Documents are crucial internal reports or con- requirements. How it works? The 'Dialog': Accessibilis steps: Select report Choose docume	s Details + support ion, processing and automation in Dynamics 365 & Template Design based on MS in every Dynamics 365 implementation. Whether you need to send sales or service documents, tracts for signing, DocumentsCorePack will help you streamline and simplify your document le from the command bar, the dialog enables users to generate and process documents in 3 simple ent action and

Figure 2: DCP-Free Trial

Give the permissions to terms of use and privacy policy by making a tick and press the [Continue]-button.



Figure 3: Terms of use and privacy policy

Another Legal Terms and Privacy Statement to agree with. Press the *[Install]*-button.

Install Documents Core Pack: Document automation $\qquad imes$
Name
Documents Core Pack: Document automation
Publisher
mscrm-addons.com (PTM EDV Systeme)
Select an environment *
CRM614680 ~
Don't see your environment?
✓ I agree to Microsoft's Legal Terms and Privacy Statement
✓ I agree to Privacy Statement and Legal Terms for importing packages into Dynamics 365

Figure 4: Legal terms privacy statement

You can see that the DocumentsCorePack is installing. This may take a while.

Power Platform adm	nin center					
=	📬 Install app 📋 Open AppSource 🖒 Refresh					
A Environments	Documents Core Pack: Document automation installation starter	① Documents Core Pack: Document automation installation started at 1:20 pm, 6/16/2021 by System Administrator.				
∠ Analytics ∨ √ Go Resources ∧ Canacity	Environments > CRM614680 > Dynamic Check the status of Dynamics 365 apps and manage the	s 365 apps em across your	org. <u>Learn more</u>			
Dynamics 365 apps	Name †		Status	Publisher		
Portals	Agent Productivity Tools		Update available	Microsoft Dynamics 365		
Help + support	App profile manager		Installed	Microsoft Dynamics 365		
🕄 Data integration	Connected Field Service Add-on		Installed	Microsoft Dynamics 365		
⊕ Data (preview)	Documents Core Pack: Document automation		C Installing	mscrm-addons.com (PTM EDV Systeme)		
Figure 5: Installing D	CP		NV 182 - 242			

When the installation is finished, you can see it in your Dynamics 365 apps.

	Power Platfor	m adm	in center			
=			📅 Install app 📋 Open AppSource 🕐 Refresh			
A	Environments		Environments > CRM614680 > Dynamics 3	65 apps		
	Analytics	\sim	Check the status of Dynamics 365 apps and manage them	across your	org. <u>Learn more</u>	
	Resources	\sim				
Ç	Help + support		Name ↑		Status	Publisher
G	Data integration		Agent Productivity Tools		Update available	Microsoft Dynamics 365
(1 0)	Data (preview)		App profile manager		Installed	Microsoft Dynamics 365
0	Data policies		Connected Field Service Add-on	•••	Installed	Microsoft Dynamics 365
0>	Admin centers	\sim	Documents Core Pack: Document automation		Installed	mscrm-addons.com (PTM EDV Systeme)
			Dynamics 365 Channel Integration Framework		Installed	Microsoft Dynamics 365
			Dynamics 365 ContextualHelp		Installed	Microsoft Dynamics 365

Figure 6: Finished installation

Have a look in your *Dynamics 365 > Advanced Settings* and you can see the installed *DocumentsCorePack* in the *MSCRM-ADDONS* column.

Dynamics 365 Settings	✓ Business Management					م
Settings						
Business	Customization	System		Process Center	MSCRM-ADDONS	Application
Business Manageme 🔅 Sync	Error Customizations	Administration	Email Configuration	Processes	Products	Apps
Templates	Solutions	Security	Activity Feeds Confi	Microsoft Flows	DocumentsCorePack	
Unified Service Desk	Microsoft AppSource	Data Management	Activity Feeds Rules			
Product Catalog	←Ⅲ Plug-In Trace Log	System Jobs	Dynamics 365 App f			
Service Management	Solutions History	Document Manage	Sales Insights			
Mobile Offline		Auditing				

Figure 7: Installed DocumentsCorePack in Dynamics 365

A click on DocumentsCorePack leads you to the DocumentsCorePack Getting Started page. Hit the *[Configure Service]*-button to proceed.



Figure 8: Getting Started Page of DocumentsCorePack

To configure the document generation service, you have to log in with an existing mscrm-addons.com user account.

	REGISTER LOGIN
Getting Started with DocumentsCorePack	mscrm-addons.com Your company for MS-CRM ADD-ONSI
Welcome to Document	sCorePack for Microsoft Dynamics 365!
P 40 8 8 10 2 2 3 30 8 8 8 9 1 2 8 8 8	
The final piece missing is to configure the document generation service below	Ν.
1 Enter your email address in the form below or login with an existi	ng mscrm-addons.com user account
Configure the service and watch our short video on Getting Starte	d with DocumentsCorePack
3 Download the Template Designer in the download section of our	website
Email address:	
Or	
Username:	
Password:	
→ Conti	nue
DocumentsCo	prePack Template Designer
The Microsoft Word based template designer allo	vs to design and edit templates for your Dynamics 365 environment.



Figure 9: Log-in with mscrm-addons.com account

After your login, this site is shown. Press the [Start]-button.



Figure 10: Getting started with DocumentsCorePack

You have to log in with the user that should be used to connect the service with your Dynamics 365 instance. Dynamics 365 administrator privileges are required!

Sign in	
admin@crm614680.onmicro	osoft.com
No account? Create one!	
Can't access your account?	
	Next
	Next

Figure 11: MS Sign in

The service installation starts!

Getting Started with DocumentsCorePack



Welcome to DocumentsCorePack for Microsoft Dynamics 365!

Documen	tsCorePack Service Setup and Configuration
This wizard allows to prov The following steps will be	ision a document generation service that is required to generate documents. e performed upon clicking "Start":
1. Define co be used to <u>Note:</u> Dyn	onnection: you will be prompted to login with the user that should o connect the service with your Dynamics 365 instance. namics 365 administrator privileges are required.
Note: Dyn 2. Service p perform th • Impo • Crea • Appi • Crea	amics 365 administrator privileges are required. rovisioning: Once connected our wizard will go ahead and he following steps automatically: ort solutions Service installation check connection.

Figure 12: Service installation

The window below pops up with information on the next steps. This means that you have finished the installation successfully. Hit the **[OK]**-button to continue.



Figure 13: Service installation info

Once the installation is completed, please also have a look at the <u>DocumentsCorePack User Guide</u> which gives you detailed explanations of all functionalities provided by DocumentsCorePack ServerBased. It aims to describe the main settings, including step-by-step descriptions about how to use all the benefits provided by our solution.

Getting Started with DocumentsCorePack	MSCIM-addons.com Your company for MS-CRM ADD-ONSI
Welcome to DocumentsCorePa	ick for Microsoft Dynamics 365!
DocumentsCorePack Servio	ce Setup and Configuration
Service Status:	Running
Data transfered (month):	0 B
Instance:	EU North Public
- Stop	e* Classic view

Figure 14: Completed installation

1 How to use DocumentsCorePack

Once the Add-On is installed click on the **[Create Document]**-button in the Dynamics 365 Command Bar to generate e.g., quotes and invoices.

$\leftarrow \rightarrow C \oplus h$	ttps://org0f6f8b03.crm4.dynai	mics.com/main.aspx?app=d365default&de	rceUCI=1&pagetype=	ntityrecord&etn=account&id=f270196b-5abf-eb11-8235-0022489a66c5	😘 tà 🕼 (Not syncing 🌒 …
Dynamics 365					P Ø P + P @ ? (si
	← 🛛 🖬 Save 🕯	\mathfrak{g}^0 Save & Close + New $\mathfrak{g}^{\mathfrak{g}}_{\mathfrak{d}}$ Open	Org Chart 🔀 Deac	vate 😤 Connect \vee 🧮 Add to Marketing List 🔍 Assign 5월 Email a Link 💼 Delete	Create Document 🕐 Refresh 🔍 Check Access
 i Home i Recent i A Pinned i A Pinned 	A. Datum C Account - Acco Summary Project Pr	Corporation (sample) unt ↔ ice Lists Assets and Locations D	etails Servicing	Files Related	S10.000.00 6.200 System Administrator Annual Revenue Number of Employees Overer
My Work	ACCOUNT INFORM	ATION		Timeline + ⊽ T≣ :	Assistant
諦 Dashboards	Account Name	* A. Datum Corporation (sample)		₽ Search timeline	
Activities	Phone	555-0158	6	C Enter a note_	No notifications or suggestions Check back later to see what's new and stay up to date.
Customers	Fax			Opportunity Completed by System Administrator Sister 27	
Accounts				5/28/2021-4:16 AM N	×
A Contacts	website	http://www.adatum.com/	4	👩 🗟 Auto-post on Very likely will order 73 Product SKU JJ105 this year (sample)	Primary Contact
Sales	Parent Account	(1997) (1997)		System Administrator won Opportunity for Account A. Datum Corporation (sample): \$153.3 \$/28/2021 4:16 AM	[R] Rene Valdes (sample)
6 Leads	Ticker Symbol	-		👩 🗟 Auto-post on Very likely will order 73 Product SKU J105 this year (sample)	🔒 Email someone ifflerample.com 🔊

Figure 15: The Create Document functionality

1) With a click on it, the DocumentsCorePack Dialog appears. The DocumentsCorePack Dialog is an easily accessible tool to create and process documents directly within Dynamics 365. As you can see in the figure below, six standard templates come with the installation of DocumentsCorePack.

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 16: The DocumentsCorePack Dialog

2) Choose the appropriate template and proceed with a click on the *[Next]*-button.

3) The DocumentsCorePack Dialog contains a set of options. The options vary and change depending on the selections you perform. In this case, you simply generate a document as pdf. Find more information about the DCP Dialog in the DocumentsCorePack User Guide (chapter 3.2 DocumentsCorePack Dialog options). Click on the [Next]-button to proceed.

Filetype	pdf 💙	
Attach document	as note	~
Print document	You have no printer configurations	~
Run workflow	You have no workflows	~
Run Action		~

Figure 17: Document generation

4) Before finishing the process, it is possible to preview the document by hitting the *[Preview]*-button.

Here you have the possibility to preview your document. AM Doc 5a066036-c272-4e16-a13c-a3d0ede3099f.pdf Preview Click finish to proceed with the following steps
AM Doc 5a066036-c272-4e16-a13c-a3d0ede3099f.pdf Preview Click finish to proceed with the following steps
Click finish to proceed with the following steps
Finish Cancel

Figure 18: DCP- preview

5) Next click on the **[Finish]**-button to complete the process. Congratulation, as you can see below, you have created your first document.

System Administrator
June 17, 2021
A. Datum Corporation (sample) 2137 Birchwood Dr
Redmond, WA 78214 U.S.
To Whom It May Concern:
We have not heard from you for a while. I wanted to check in and make sure that you are still having a great experience using our product(s). I will contact you next week to get your feedback on the product(s) you are currently using and to give you details about our upcoming products.
Sincerely,
System Administrator

Figure 19: : PDF of Account Reconnect template

2 Create your own template

To create own custom templates, you require the *DocumentsCorePack Client (Template Designer)*, which can be downloaded <u>here</u>.

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

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 a lot of options that facilitate the creation of template.



Figure 20: Word template – TemplateDesigner

Getting Started from AppSource



3 License Manager

All our Add-Ons come with a 14-days trial license. Once received the license from our support-team, open the License Manager to install it. For more information, have a look at the <u>Licensing Guide</u>. 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.

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Contact

For further technical questions, please visit our <u>blog</u> or contact <u>support@mscrm-addons.com</u>.

For sales and licensing questions please contact <u>office@mscrm-addons.com</u> or the corresponding contact information below.

Headquarter – Europe

PTM EDV-Systeme GmbH Bahnhofgürtel 59 A-8020 Graz Austria

Tel Austria +43 316 680-880-0 Fax +43 316 680-880-25

Support: 7AM - 8PM GMT+1 (Monday-Friday)

Sales: +43 316 680 880 14 sales@mscrm-addons.com

www.ptm-edv.at www.mscrm-addons.com

Headquarter – US

mscrm-addons.com Corp 1860 North Rock Springs Rd Atlanta, GA 30324 United States

Tel US +1404720 6066

Support: 9AM - 6PM EST (Monday-Friday)

Sales: +1 404 720 6046 ussales@mscrm-addons.com

www.mscrm-addons.com