



DocumentsCorePack ServerBased Getting Started from AppSource

Hello!

Thank you for your interest in [DocumentsCorePack ServerBased](#). This Getting Started Guide will help you to install this Add-On from Microsoft AppSource. For detailed information, please take a look at our [guides](#) or [blogs](#).

There are basically two ways to install DocumentsCorePack from AppSource:

1. Get solution from Marketplace in Dynamics 365

It is possible to open AppSource directly from Dynamics 365. Therefore, please navigate to Settings > Solutions and hit the **[Get Solutions from Marketplace]**-button, highlighted in yellow in the figure below.

A screenshot of the Dynamics 365 Solutions page. The top navigation bar shows "Dynamics 365", "Settings", and "Solutions". The main area is titled "All Solutions" and contains a grid of solution cards. One specific button in the toolbar above the grid is highlighted with a yellow box. The grid columns include Name, Display Name, Version, Installed On, Package T..., Publisher, and Description. Some rows are partially visible, such as "msdyn_PowerAppsCh..." and "AutoMergeGlobalButt...".

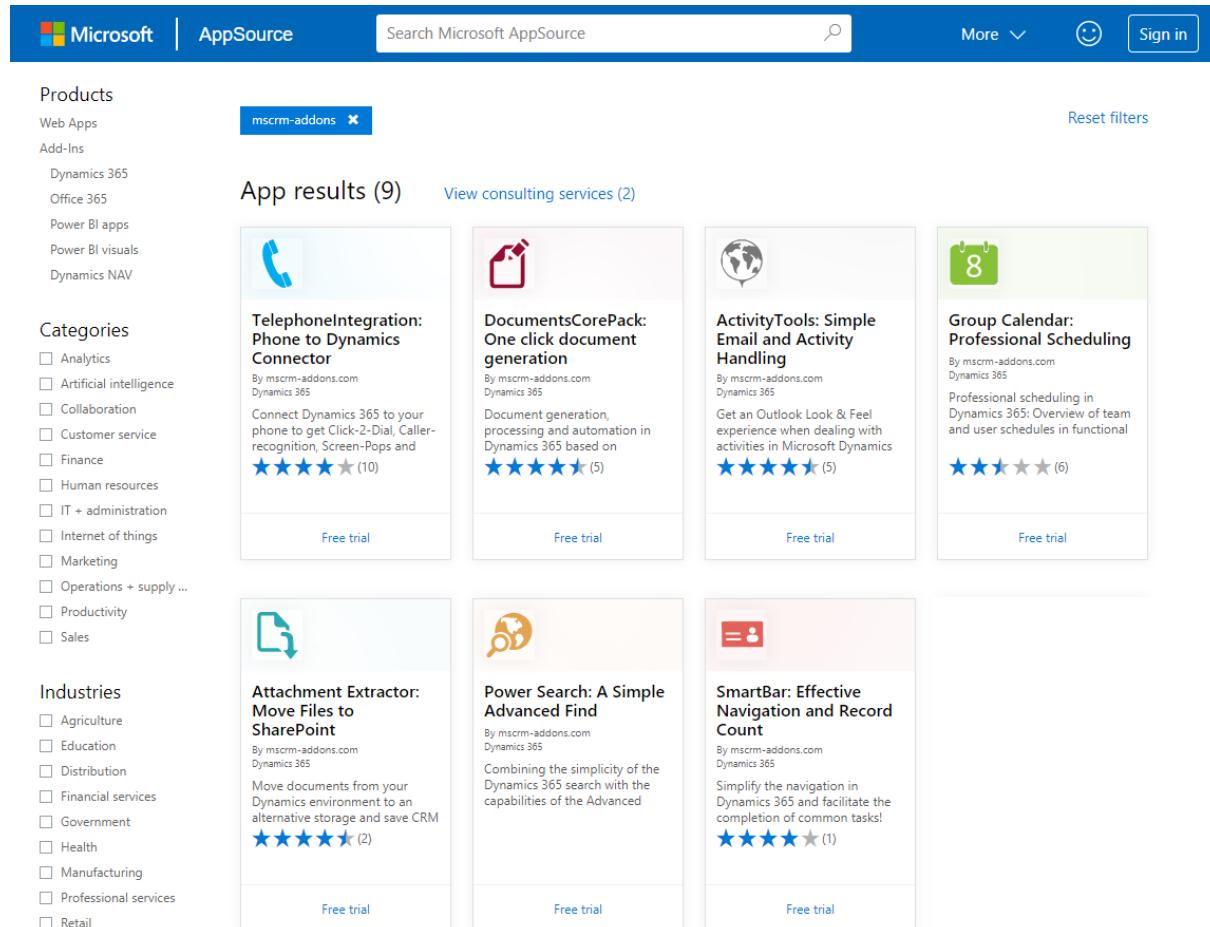
Name	Display Name	Version	Installed On	Package T...	Publisher	Description
msdyn_PowerAppsCh...	PowerApps Checker	1.0.0.103	5/11/2019	Managed	Microsoft Dynamics 365	PowerApps Checker promotes higher-quality mo...
AutoMergeGlobalButt...	AutoMergeGlobalButt...	2017.1	5/9/2019	Managed	PTM EDV Systeme GmbH	
AutoMergeServerCore	DocumentsCorePack b...	2017.5	5/9/2019	Managed	PTM EDV Systeme GmbH	This solution contains basic settings for Docume...
DocumentsCorePackS...	MSCRM-ADDONS.co...	2017.2	5/9/2019	Managed	PTM EDV Systeme GmbH	This solution contains the data for DocumentsCo...
MSCRMADDONSc...	MSCRM-ADDONS.co...	2017.39	5/9/2019	Managed	PTM EDV Systeme GmbH	General MSCRM-ADDONS.com Solution.
msdynce_CRMHub	Crm Hub	1.0.20170...	5/4/2019	Managed	Microsoft Dynamics 365	
Crb330e	Common Data Service...	1.0.0.0	5/3/2019	Unmanag...	CDS Default Publisher	

Figure 1: Get solutions from Marketplace

This leads you to the AppSource website where you can search for DocumentsCorePack and is described below.

2. Get solution from AppSource

The second option is to go to the AppSource website and search for DocumentsCorePack. Use this [link](#) to find all add-ons provided by mscrm-addons.com (figure below).

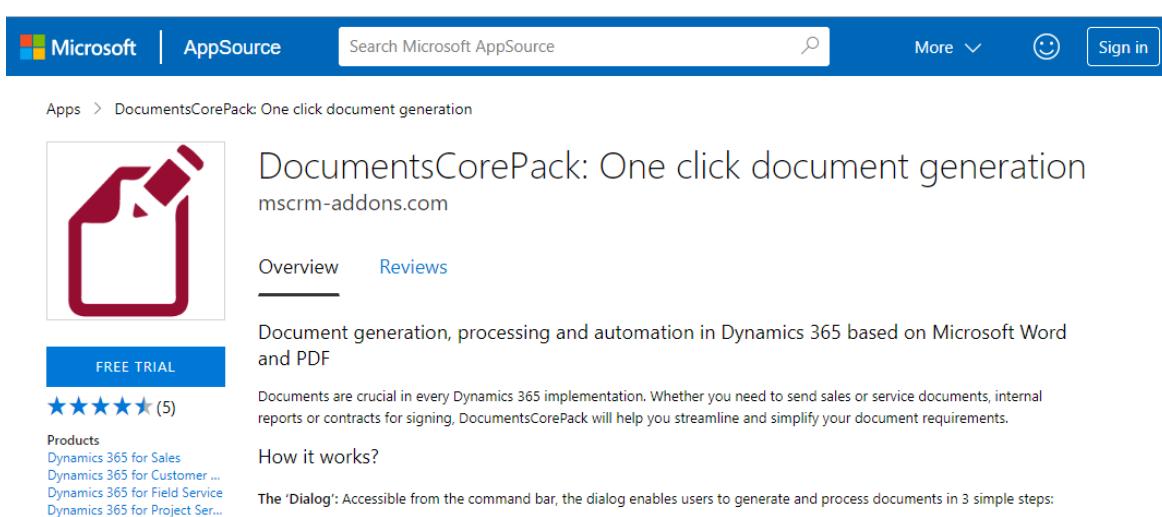


The screenshot shows the Microsoft AppSource interface. The search bar at the top contains the text "mscrm-addons". Below the search bar, there are several filters on the left side, including "Products" (Web Apps, Add-Ins, Dynamics 365, Office 365, Power BI apps, Power BI visuals, Dynamics NAV), "Categories" (Analytics, Artificial intelligence, Collaboration, Customer service, Finance, Human resources, IT + administration, Internet of things, Marketing, Operations + supply ..., Productivity, Sales), and "Industries" (Agriculture, Education, Distribution, Financial services, Government, Health, Manufacturing, Professional services, Retail). The main area displays "App results (9)" with two tabs: "View consulting services (2)". There are nine cards, each representing a different add-on:

- TelephoneIntegration: Phone to Dynamics Connector**: By mscrm-addons.com, Dynamics 365. Description: Connect Dynamics 365 to your phone to get Click-2-Dial, Caller-recognition, Screen-Pops and more. Rating: ★★★★☆ (10). Buttons: Free trial.
- DocumentsCorePack: One click document generation**: By mscrm-addons.com, Dynamics 365. Description: Document generation, processing and automation in Dynamics 365 based on Microsoft Word and PDF. Rating: ★★★★★ (5). Buttons: Free trial.
- ActivityTools: Simple Email and Activity Handling**: By mscrm-addons.com, Dynamics 365. Description: Get an Outlook Look & Feel experience when dealing with activities in Microsoft Dynamics. Rating: ★★★★★ (5). Buttons: Free trial.
- Group Calendar: Professional Scheduling**: By mscrm-addons.com, Dynamics 365. Description: Professional scheduling in Dynamics 365: Overview of team and user schedules in functional calendar. Rating: ★★★★☆ (6). Buttons: Free trial.
- Attachment Extractor: Move Files to SharePoint**: By mscrm-addons.com, Dynamics 365. Description: Move documents from your Dynamics environment to an alternative storage and save CRM. Rating: ★★★★★ (2). Buttons: Free trial.
- Power Search: A Simple Advanced Find**: By mscrm-addons.com, Dynamics 365. Description: Combining the simplicity of the Dynamics 365 search with the capabilities of the Advanced Search. Rating: ★★★★★ (2). Buttons: Free trial.
- SmartBar: Effective Navigation and Record Count**: By mscrm-addons.com, Dynamics 365. Description: Simplify the navigation in Dynamics 365 and facilitate the completion of common tasks! Rating: ★★★★★ (1). Buttons: Free trial.

Figure 2: AppSource – solutions by mscrm-addons.com

Next, please select DocumentsCorePack. The so opened window provides you with information regarding DCP. Here, please click on the **[FREE TRIAL]**-button on the left side.



The screenshot shows the product page for "DocumentsCorePack: One click document generation" by mscrm-addons.com. The page includes the following sections:

- Overview** (selected) and **Reviews**
- FREE TRIAL** button
- Rating: ★★★★★ (5)**
- Products** section: Dynamics 365 for Sales, Dynamics 365 for Customer ..., Dynamics 365 for Field Service, Dynamics 365 for Project Ser...
- Description**: Document generation, processing and automation in Dynamics 365 based on Microsoft Word and PDF.
- Details**: Documents are crucial in every Dynamics 365 implementation. Whether you need to send sales or service documents, internal reports or contracts for signing, DocumentsCorePack will help you streamline and simplify your document requirements.
- How it works?**
- The 'Dialog'**: Accessible from the command bar, the dialog enables users to generate and process documents in 3 simple steps:

Figure 3: AppSource – DocumentsCorePack

Next, please sign into Microsoft AppSource. Enter your e-mail address and hit the [**Sign in**]-button as you can see in the figure below.

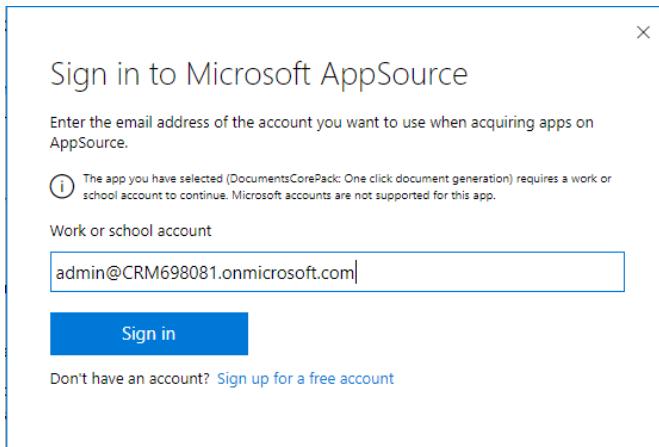


Figure 4: Sign in to Microsoft AppSource

In the window below please enter your basic profile information and check the Microsoft permission checkbox at the bottom. Click on the [**Continue**]-button to proceed.

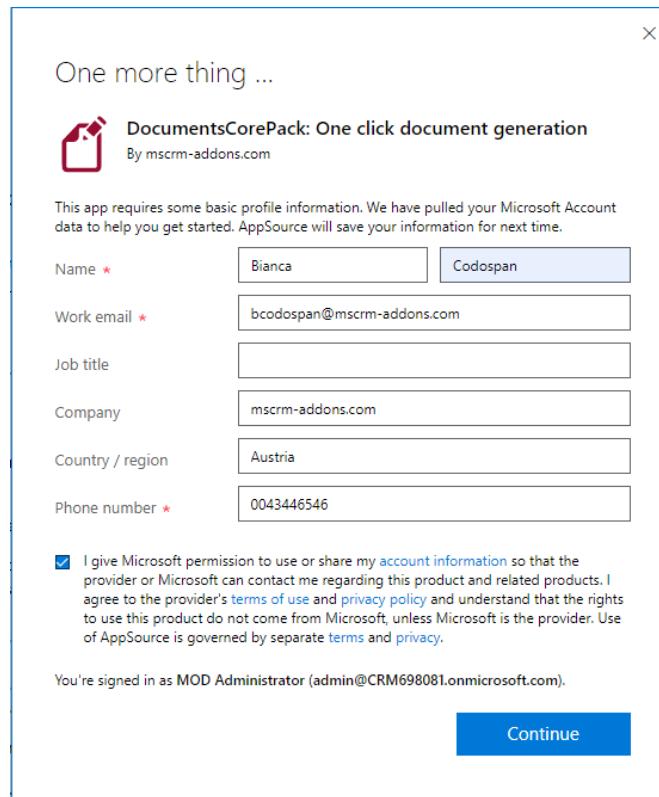


Figure 5: Enter your basic profile information

Next, please enter the Dynamics 365 organization you want to add the solution to, check the checkboxes below and hit the **[Agree]**-button.

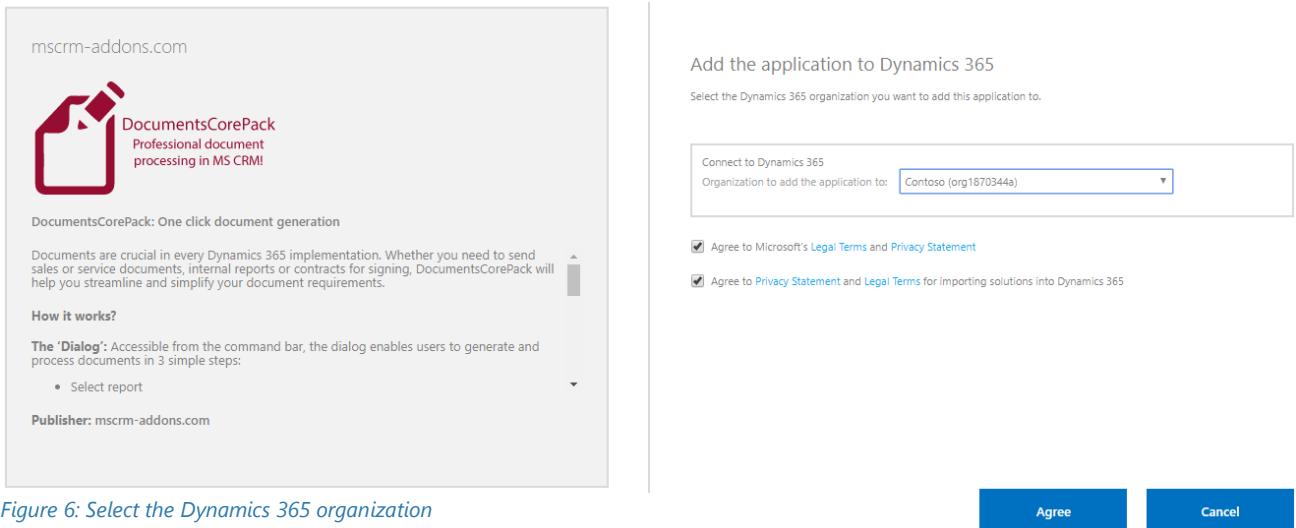
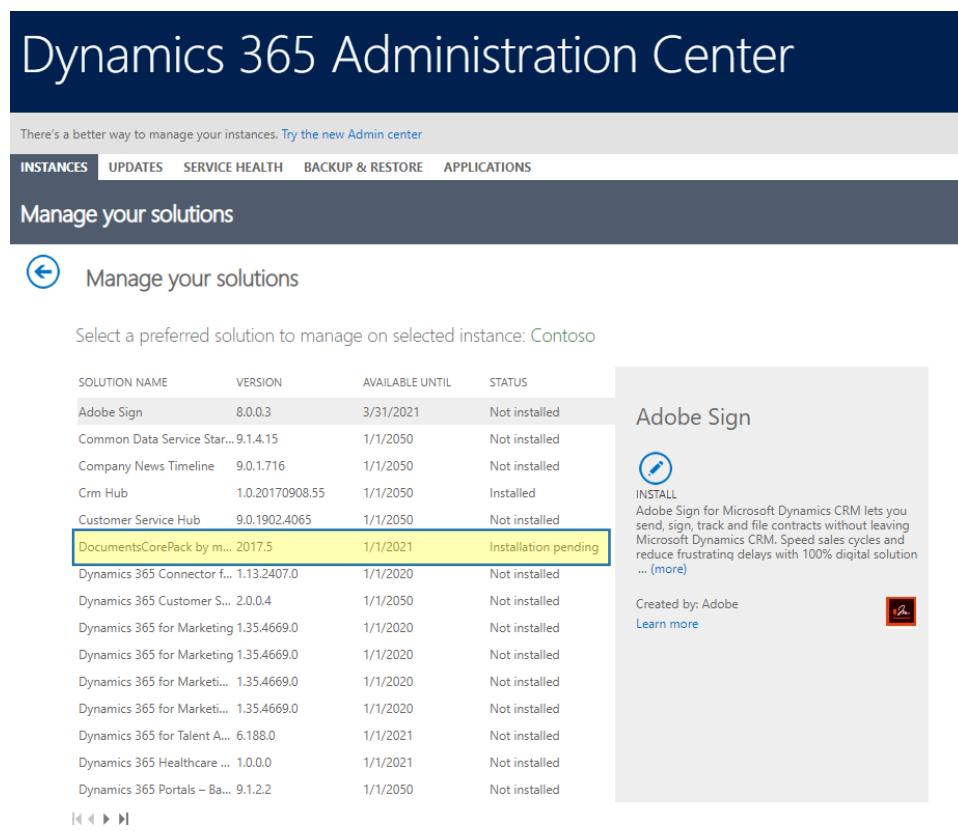


Figure 6: Select the Dynamics 365 organization

This leads you to your organization overview. The installation takes a while – as you can see DocumentsCorePack has the Status “Installation pending” until the installation is completed (highlighted in yellow).

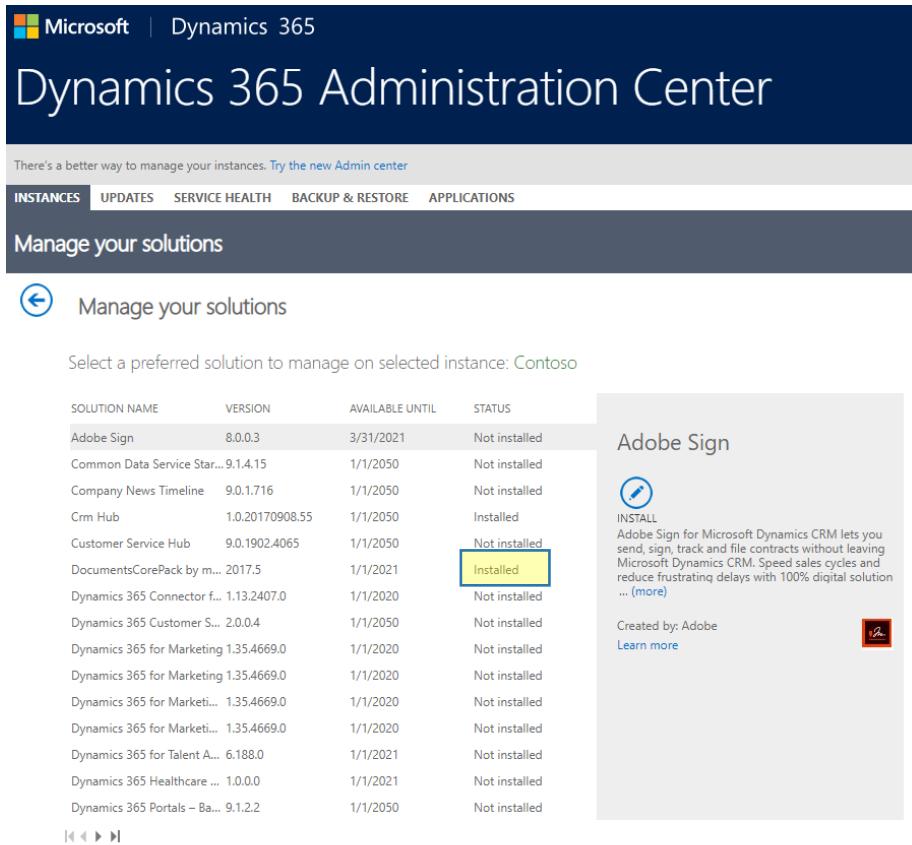


SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Adobe Sign	8.0.0.3	3/31/2021	Not installed
Common Data Service Star...	9.1.4.15	1/1/2050	Not installed
Company News Timeline	9.0.1.716	1/1/2050	Not installed
Crm Hub	1.0.20170908.55	1/1/2050	Installed
Customer Service Hub	9.0.1902.4065	1/1/2050	Not installed
DocumentsCorePack by m...	2017.5	1/1/2021	Installation pending
Dynamics 365 Connector f...	1.13.2407.0	1/1/2020	Not installed
Dynamics 365 Customer S...	2.0.0.4	1/1/2050	Not installed
Dynamics 365 for Marketing	1.35.4669.0	1/1/2020	Not installed
Dynamics 365 for Marketing	1.35.4669.0	1/1/2020	Not installed
Dynamics 365 for Marketi...	1.35.4669.0	1/1/2020	Not installed
Dynamics 365 for Marketi...	1.35.4669.0	1/1/2020	Not installed
Dynamics 365 for Talent A...	6.188.0	1/1/2021	Not installed
Dynamics 365 Healthcare ...	1.0.0.0	1/1/2021	Not installed
Dynamics 365 Portals – Ba...	9.1.2.2	1/1/2050	Not installed

Figure 7: Organization overview – DCP installation pending

Meanwhile, you will receive an e-mail with more information about DCP and its usage.

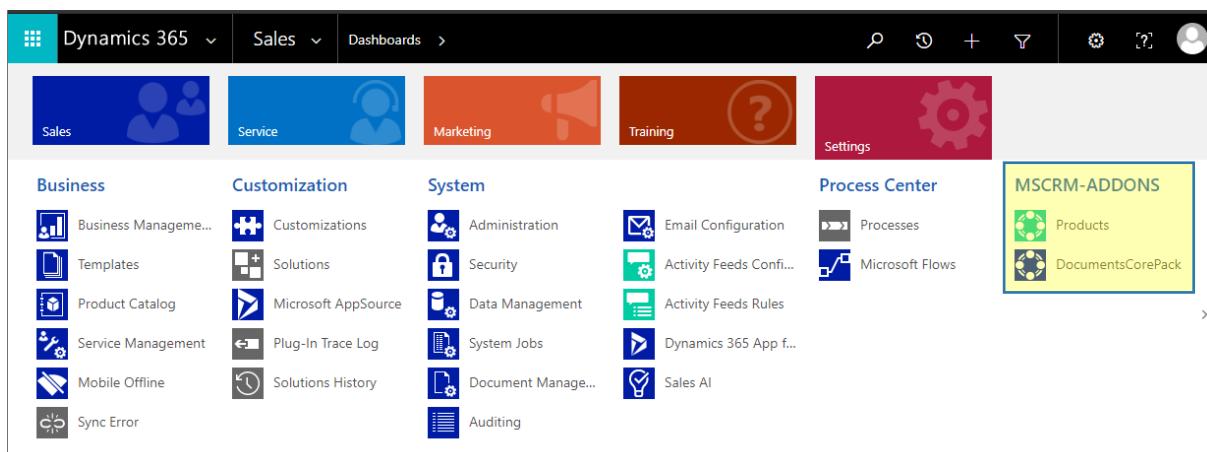
To see when the installation is finished, please refresh the page in between. Only when the status is on "Installed" you can continue with the process (highlighted in yellow below).



The screenshot shows the Dynamics 365 Administration Center interface. At the top, there's a banner with the text "There's a better way to manage your instances. Try the new Admin center". Below the banner, the navigation bar includes INSTANCES, UPDATES, SERVICE HEALTH, BACKUP & RESTORE, and APPLICATIONS. The main content area is titled "Manage your solutions". It displays a list of available solutions, with one entry, "Adobe Sign", highlighted by a yellow box around its "Status" column, which shows "Installed". To the right of the list, there's a detailed view of the "Adobe Sign" solution, including its description, creator (Adobe), and a "Learn more" link.

Figure 8: Organization overview – DCP installation finished

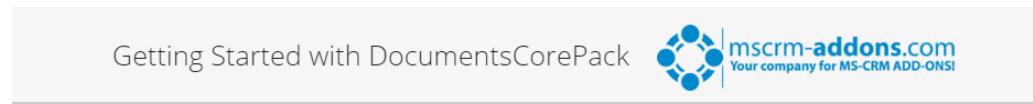
Congratulations! You have successfully completed the installation of DocumentsCorePack from Microsoft AppSource. If you now open your Dynamics 365 Settings, you will see the MSCRM-ADDONS section containing the so installed solution – DocumentsCorePack (highlighted in yellow).



The screenshot shows the Dynamics 365 Settings page. The top navigation bar includes links for Dynamics 365, Sales, Dashboards, and various system settings icons. Below the navigation, there are several main categories: Business, Customization, System, Process Center, and MSCRM-ADDONS. The "MSCRM-ADDONS" category is highlighted with a yellow box, and within it, the "DocumentsCorePack" solution is also highlighted with a yellow box. This indicates that the solution has been successfully installed and is now available in the system settings.

Figure 9: Dynamics 365 Settings > MSCRM-ADDONS: DocumentsCorePack

A click on DocumentsCorePack leads you to the DocumentsCorePack *Getting Started* page. Hit the **[Start]**-button in order to proceed.



Welcome to DocumentsCorePack for Microsoft Dynamics 365!

DocumentsCorePack Service Setup and Configuration

This wizard allows to provision a document generation service that is required to generate documents. The following steps will be performed upon clicking "Start":

1. **Define connection:** you will be prompted to login with the user that should be used to connect the service with your Dynamics 365 instance.
Note: Dynamics 365 administrator privileges are required.
2. **Service provisioning:** Once connected our wizard will go ahead and perform the following steps automatically:
 - o Import solutions
 - o Create default settings
 - o Apply security roles
 - o Create service



Figure 10: DocumentsCorePack Getting Started page

As you can see in the figure above, 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!

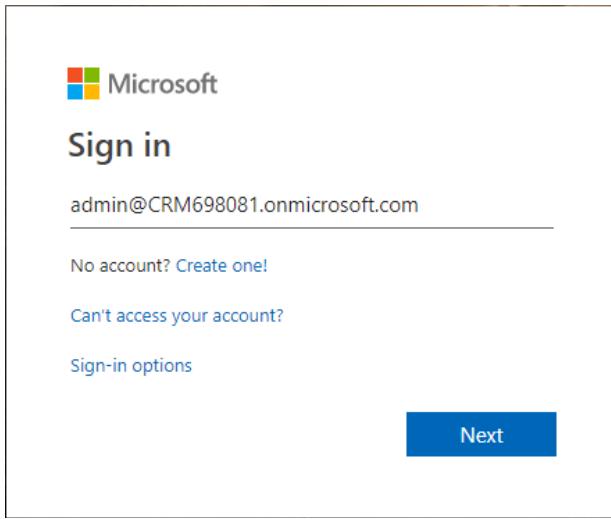


Figure 11: Login with administrator account

Once connected our wizard will automatically import solutions, create default settings, apply for security roles and create a service (see figure 10).

Accept the permissions below by checking the checkbox. With a click on the arrows on the left side, you will get a short description of the requested permissions.

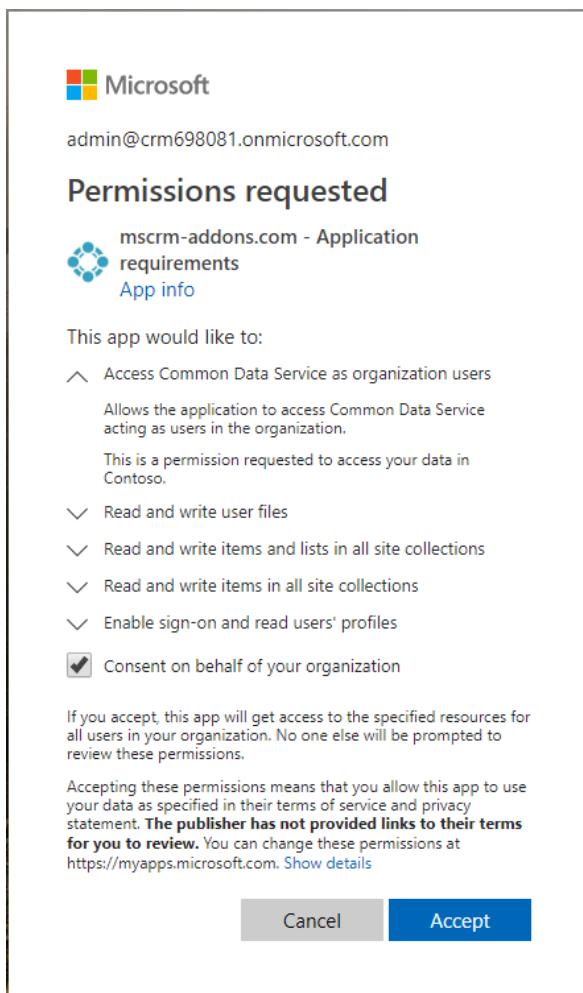


Figure 12: Accept requested permissions

The window below pops up with information on the next steps. This means that you have finished the installation successfully.

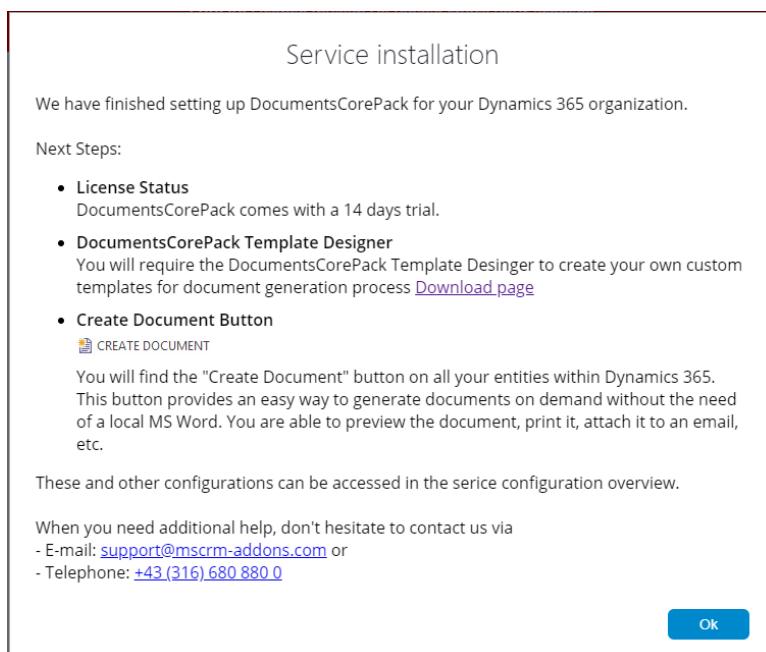


Figure 13: Service installation information

Hit the **[OK]**-button to continue. The window below appears with information on your service.

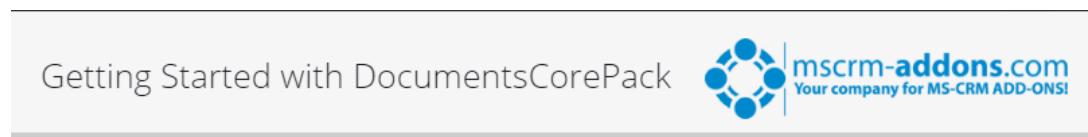
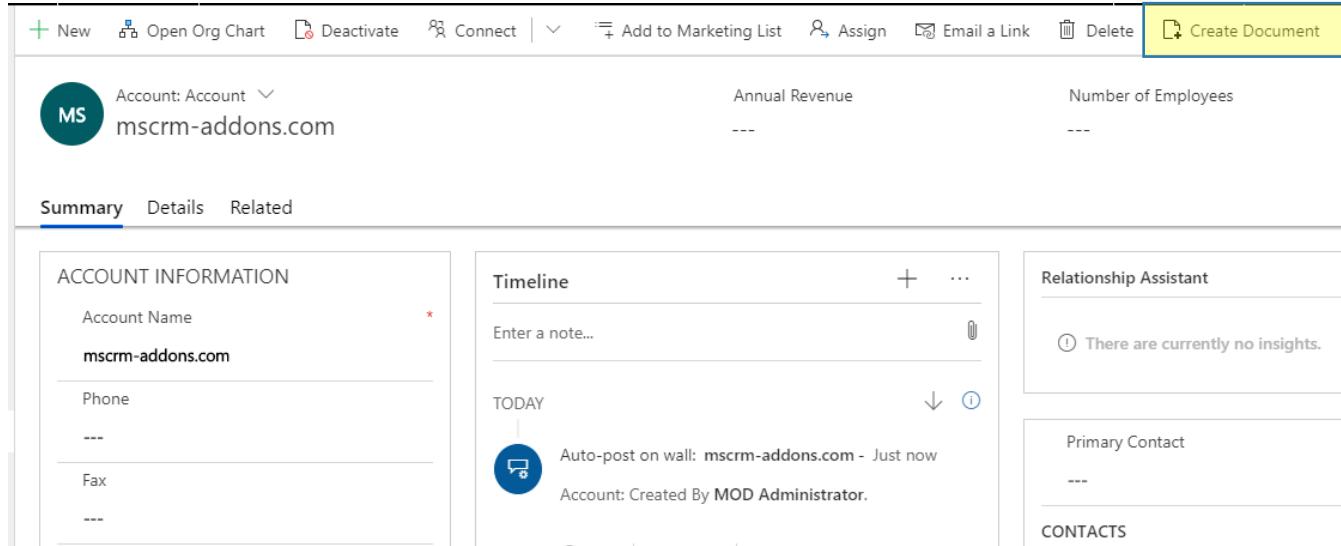


Figure 14: Service information

Once the installation is completed, please also have a look at the [DocumentsCorePack User Guide](#) 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.

3. How to use DocumentsCorePack

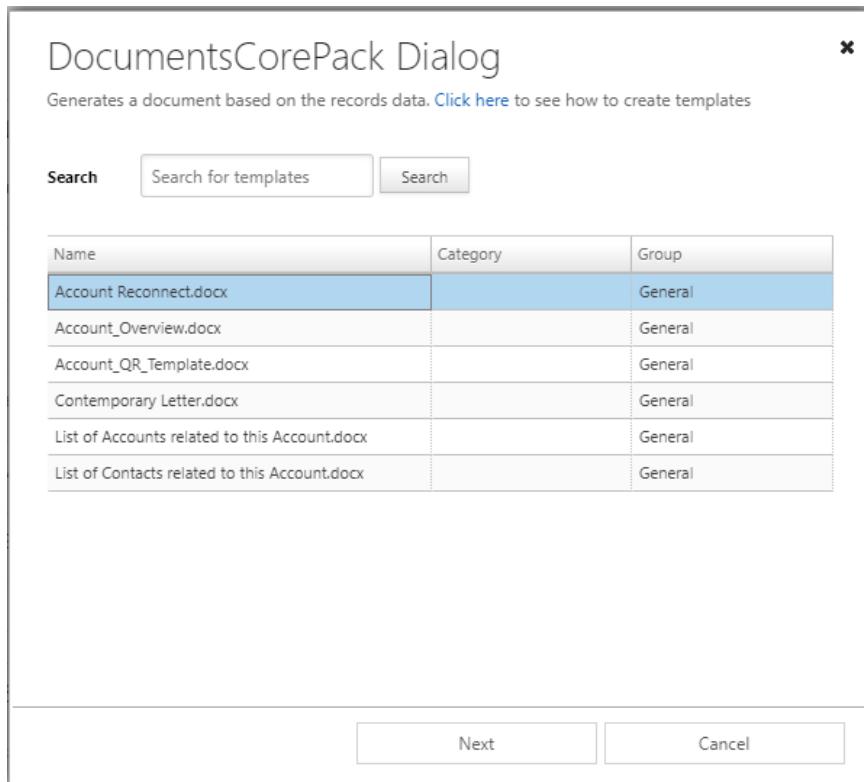
Once the Add-On is installed click on the **[Create Document]**-button in the Dynamics 365 Command Bar to generate e.g. quotes and invoices.



The screenshot shows the Dynamics 365 interface for an account record. The top navigation bar includes buttons for New, Open Org Chart, Deactivate, Connect, Add to Marketing List, Assign, Email a Link, Delete, and Create Document. The 'Create Document' button is highlighted with a yellow box. The account details shown are: Account Name - mscrm-addons.com, Annual Revenue - ---, and Number of Employees - --. Below the header, there are tabs for Summary, Details, and Related. The Summary tab is selected. On the left, there's a section for ACCOUNT INFORMATION with fields for Account Name (mscrm-addons.com), Phone (---), and Fax (---). In the center, there's a Timeline section with a note: 'Enter a note...' and 'TODAY Auto-post on wall: mscrm-addons.com - Just now Account: Created By MOD Administrator.' On the right, there are sections for Relationship Assistant (with a message: 'There are currently no insights.'), Primary Contact (---), and CONTACTS.

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.



The screenshot shows the 'DocumentsCorePack Dialog' window. At the top, it says 'Generates a document based on the records data. Click here to see how to create templates'. Below that is a search bar with a 'Search for templates' input field and a 'Search' button. A table lists six templates: 'Account Reconnect.docx' (Category: General), 'Account_Overview.docx' (Category: General), 'Account_QR_Template.docx' (Category: General), 'Contemporary Letter.docx' (Category: General), 'List of Accounts related to this Account.docx' (Category: General), and 'List of Contacts related to this Account.docx' (Category: General). At the bottom of the dialog are 'Next' and 'Cancel' buttons.

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.

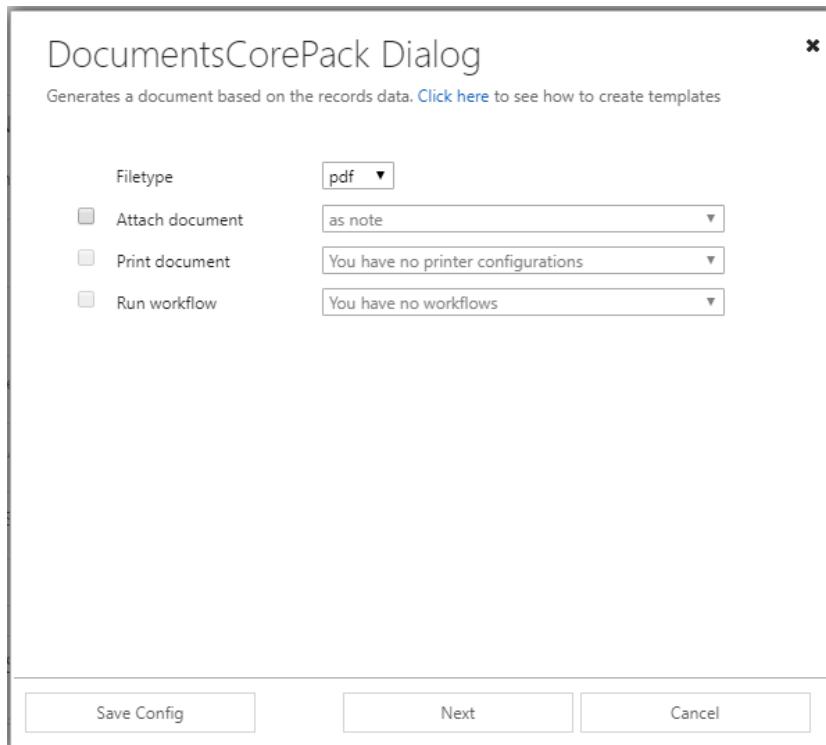


Figure 17: The DocumentsCorePack Dialog options

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

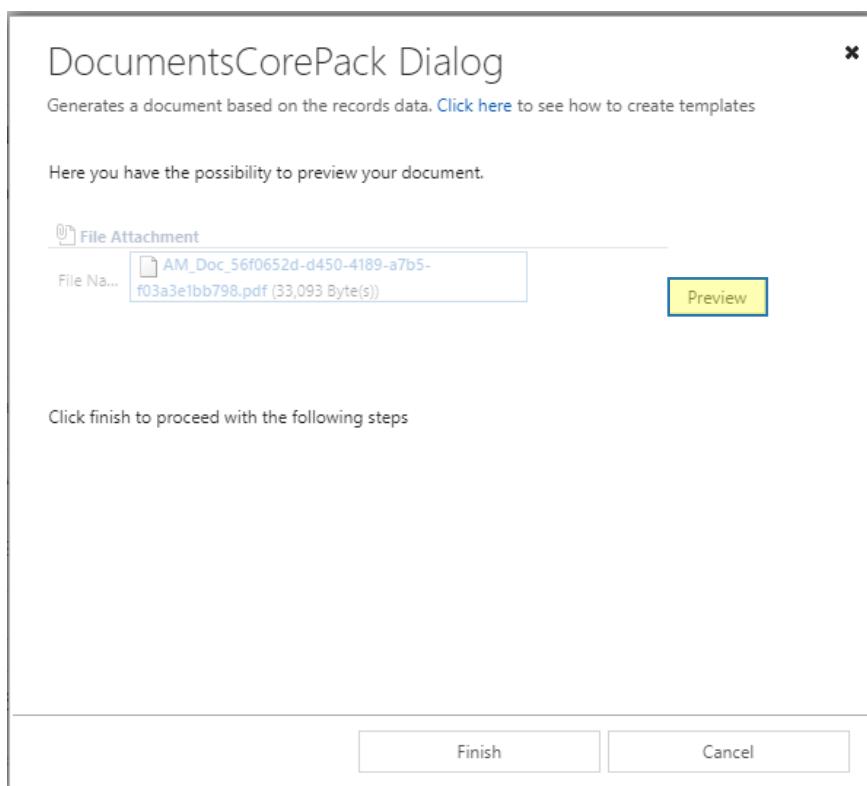


Figure 18: The DocumentsCorePack Dialog: Preview document

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

MOD Administrator

June 4, 2019

mscrm-addons.com

,

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,

MOD Administrator

Figure 19: PDF of Account Reconnect template

4. Create your own templates

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

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

The DCP 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 templates.

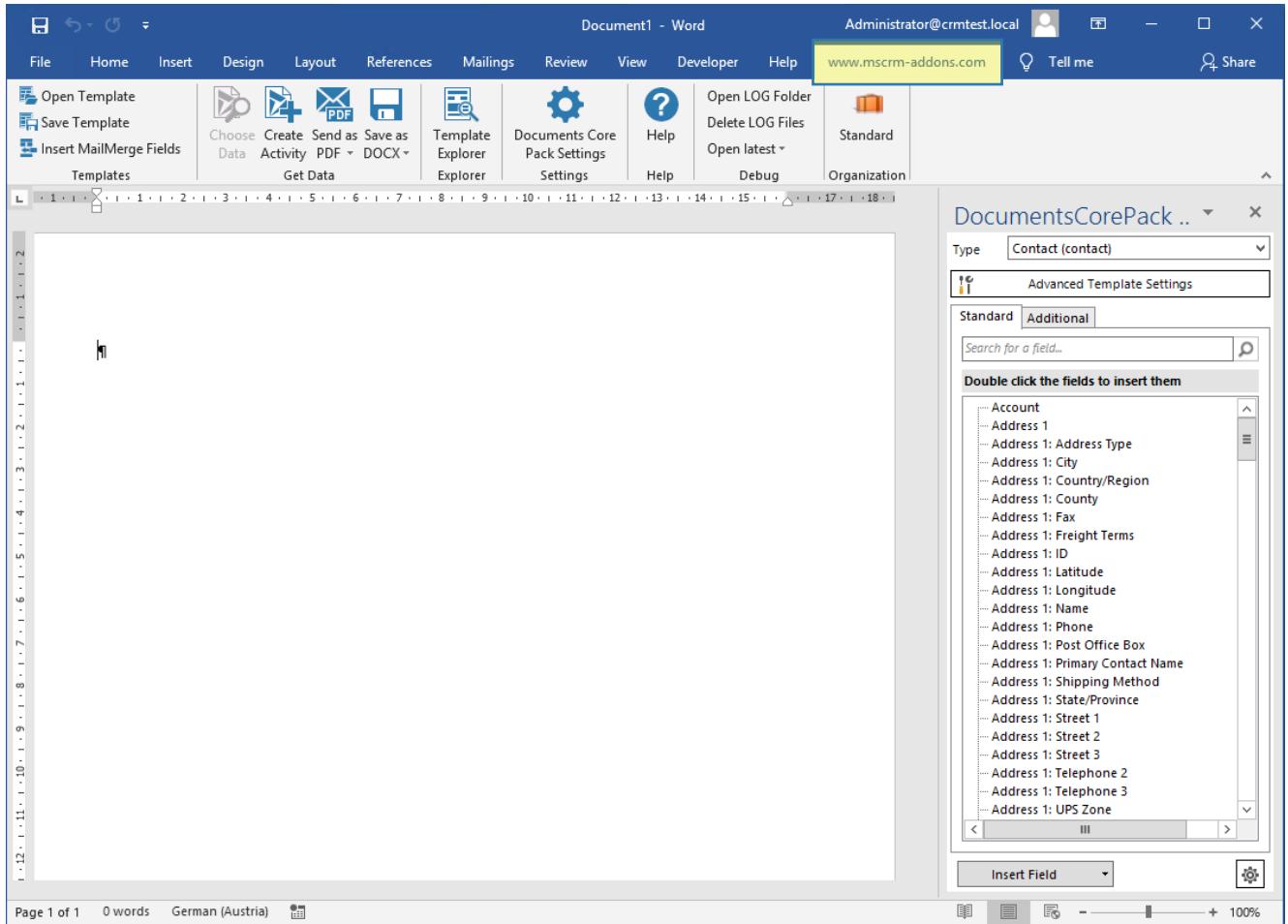


Figure 20: Microsoft Office Word with mscrm-addons ribbon

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

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 [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.

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Contact

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

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