

DocumentsCorePack ServerBased

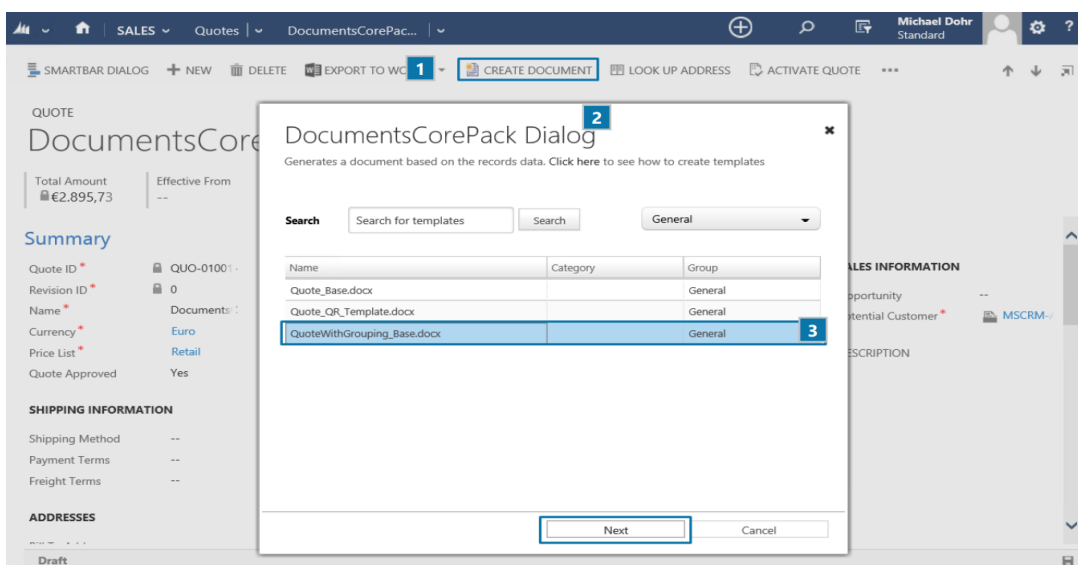
Getting Started

Hello!

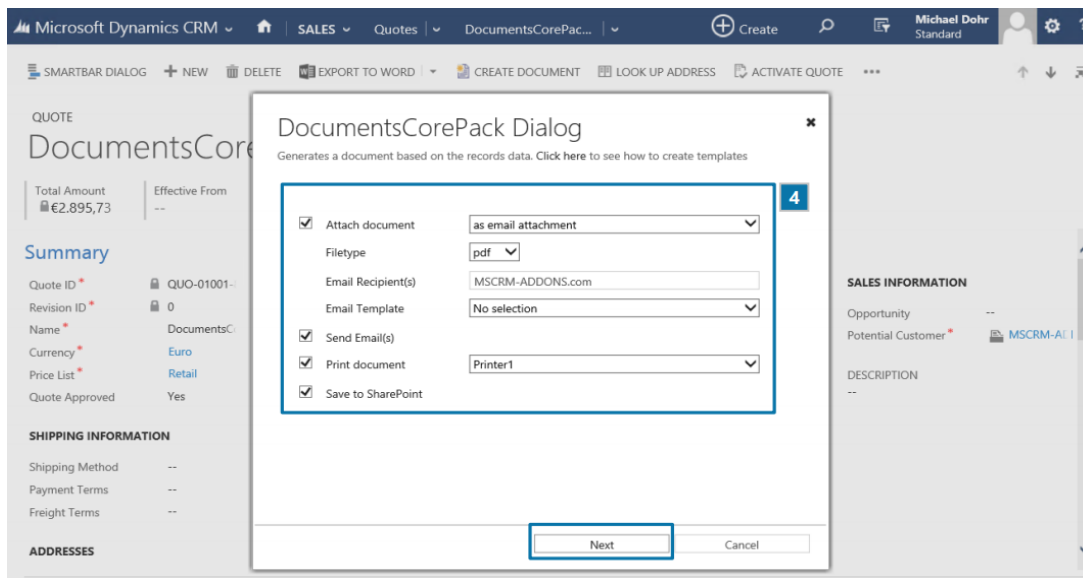
Thank you for using [DocumentsCorePack ServerBased](#). This Getting Started Guide will help you to work with this Add-On right away introducing the main features. For detailed information, please take a look at our [guides](#) or [blog](#).

How to use DocumentsCorePack

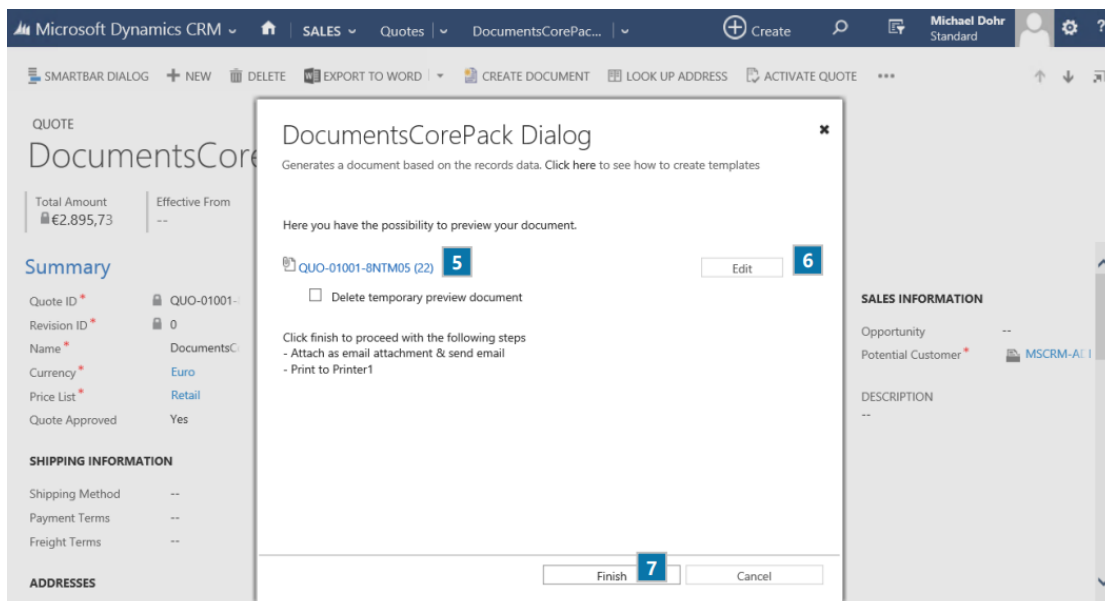
- 1) Once the Add-On is installed click on the **[Create Document]**-button in the Dynamics 365 Command Bar to generate e.g. quotes and invoices.
- 2) With a click on it, the "DocumentsCorePack Dialog" appears:



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



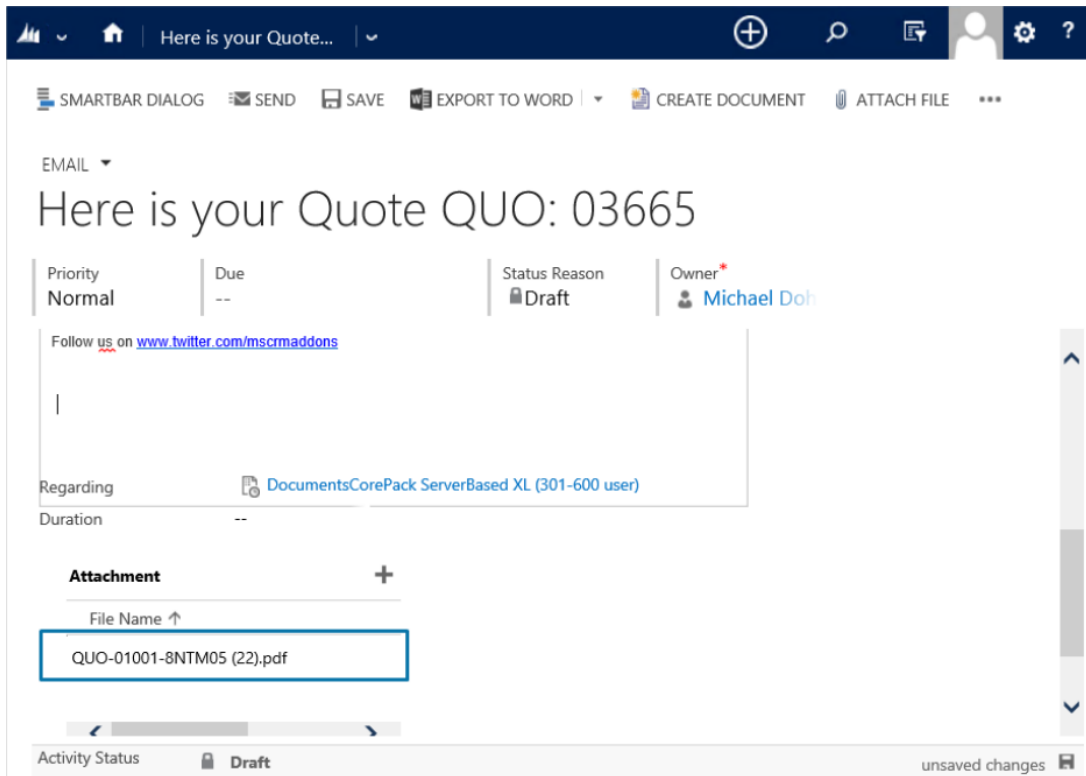
4) Now choose the required settings. **Note:** The “preview & edit”-functionality is only available for pdf-files allowing following “Attach document” options: as a note, as an email attachment, as a letter. Click on the **[Next]**-button to proceed.



5) Click here to preview the document.

6) Click on the **[Edit]**-button to edit the document (only with SharePoint) integration.

7) Next click on the **[Finish]**-button to complete the process.



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.

Contact

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

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