

STREAMLINED DOCUMENT PROCESSING

within Customer Journeys in
Dynamics 365 Customers Insights



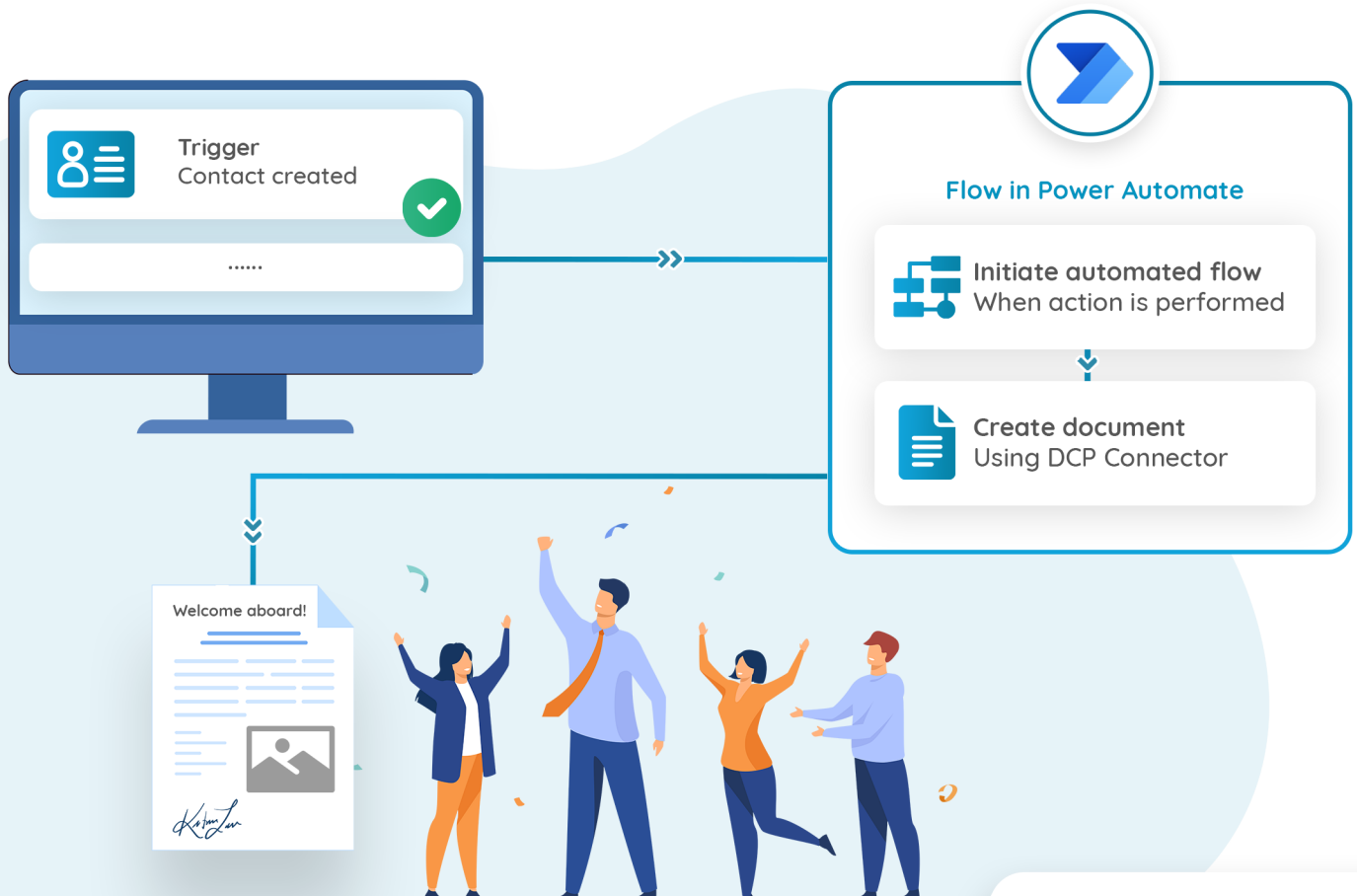
Customer Journeys within Dynamics 365 Customer Insights (previously known as Dynamics 365 Marketing) serve to steer individuals within a targeted marketing segment through a predetermined sequence. This sequence encompasses automated messaging, activity initiation, interactive decision nodes, and additional functionalities.

In combination with Power Automate, DocumentsCorePack extends the capability to generate and deliver documents within these journeys.

How is DocumentsCorePack used within Customer Journeys?

Typical scenarios involving the processing of documents within Customer Journeys include generating and printing letters upon event registration, drafting and dispatching contracts for electronic signatures, and creating and sending brochures to new leads.

DocumentsCorePack can seamlessly integrate into any customer journey by using a custom trigger. This trigger can be tailored to activate a Power Automate flow, which in turn utilizes the DocumentsCorePack (DCP) Connector to generate documents efficiently.



Benefits of using DocumentsCorePack in Customer Journeys

DocumentsCorePack within Customer Journeys in Microsoft Dynamics 365 Customer Insights can lead to more efficient, personalized, and impactful customer communications, ultimately driving better business outcomes.



Streamlined Document Generation

With DocumentsCorePack, users can generate documents directly within Customer Journeys, eliminating the need to switch between different applications or platforms.



Personalized Communication

Business users can create personalized documents tailored to each customer's journey stage or specific needs, enhancing the customer experience and engagement.



Efficiency & Productivity

By automating document generation processes within Customer Journeys, businesses can save time and resources, allowing employees to focus on more strategic tasks.



Consistency & Compliance

Documents generated through DocumentsCorePack can ensure consistency in branding, formatting, and content, while also helping to maintain regulatory compliance by including necessary disclosures or information.



“ I am absolutely thrilled about the amazing capabilities of DocumentsCorePack that have made our document-heavy business processes a breeze to manage. What's more, the outstanding support provided by the team at mscrm-addons has been truly exceptional, and I haven't come across any other service provider that offers such top-notch assistance. Overall, my experience with DocumentsCorePack has been nothing short of remarkable, and I couldn't be happier with the results it has delivered. ”

Ferdinand von Gaisberg, Senior IT Application Analyst (Geberit AG)



START YOUR 14-DAYS FREE TRIAL!

All features and support included