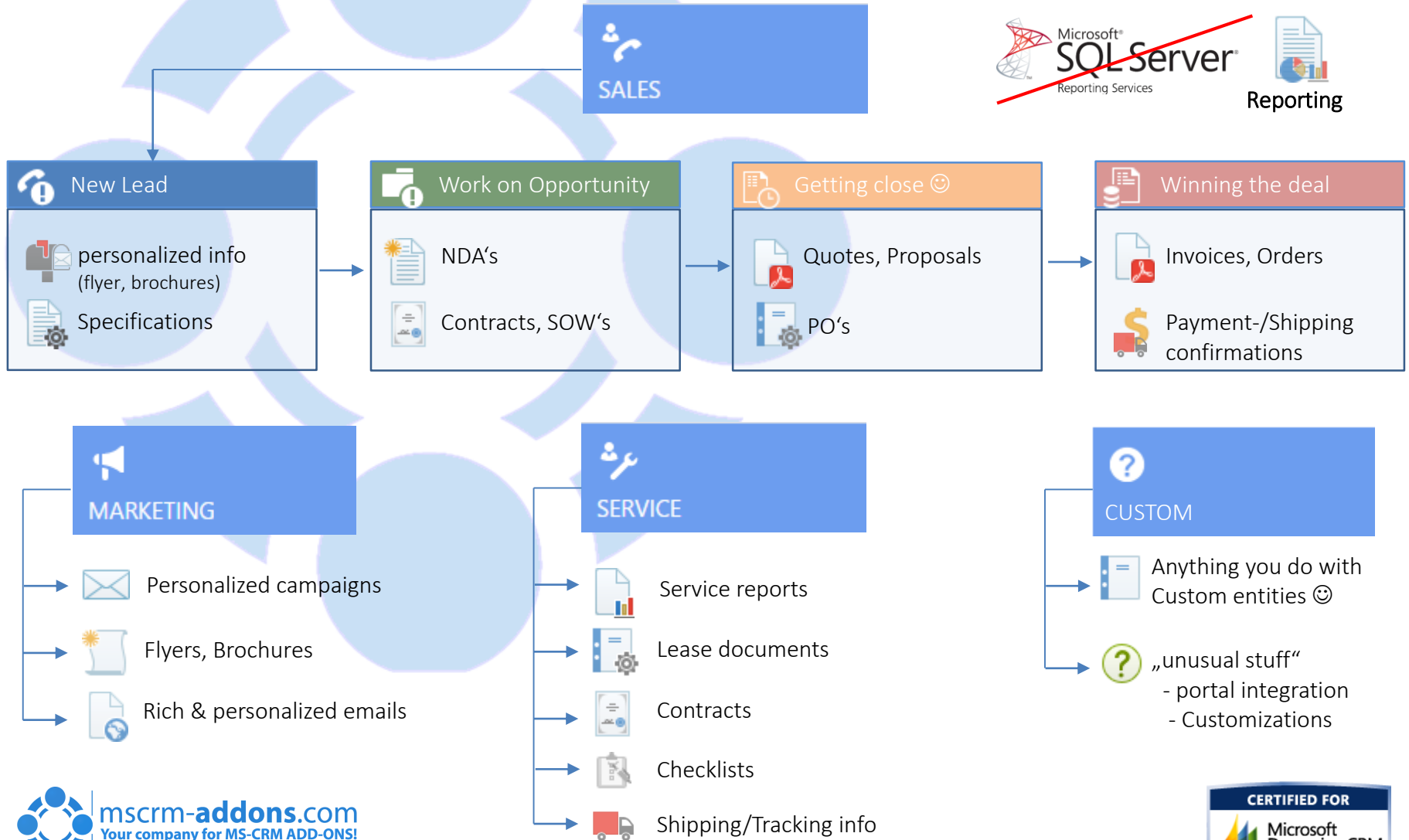


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Commands & One-Click-Actions

How to speed up document processes in Microsoft Dynamics CRM

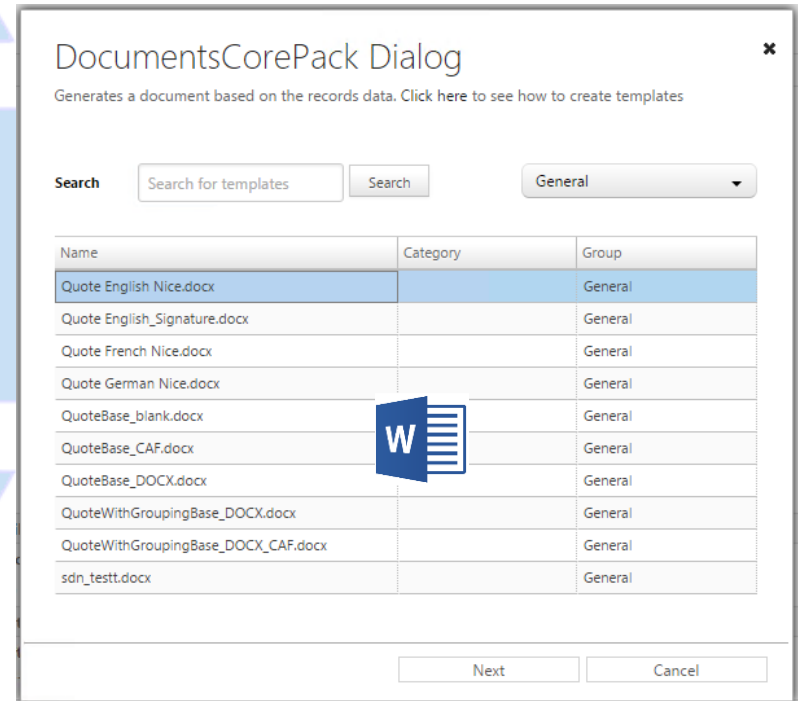
The need for document generation in a CRM environment



The Document Generation Wizard

Value: Create and process documents right from the CRM Commandbar in three steps

- **Step 1: Select template**
MS Word based templates provided via DocumentsCorePack template designer
- **Step 2: Choose document purpose**
 - File Format
 - Attach as note or letter
 - Start eSignature process
 - Save to SharePoint
 - Print
 - ...
- **Step 3: Preview and Finish**
Instant-Preview within Dialog and option to edit document if necessary



The Document Generation Wizard

Value: Create and process documents right from the CRM Commandbar in three steps

- **Step 1: Select template**

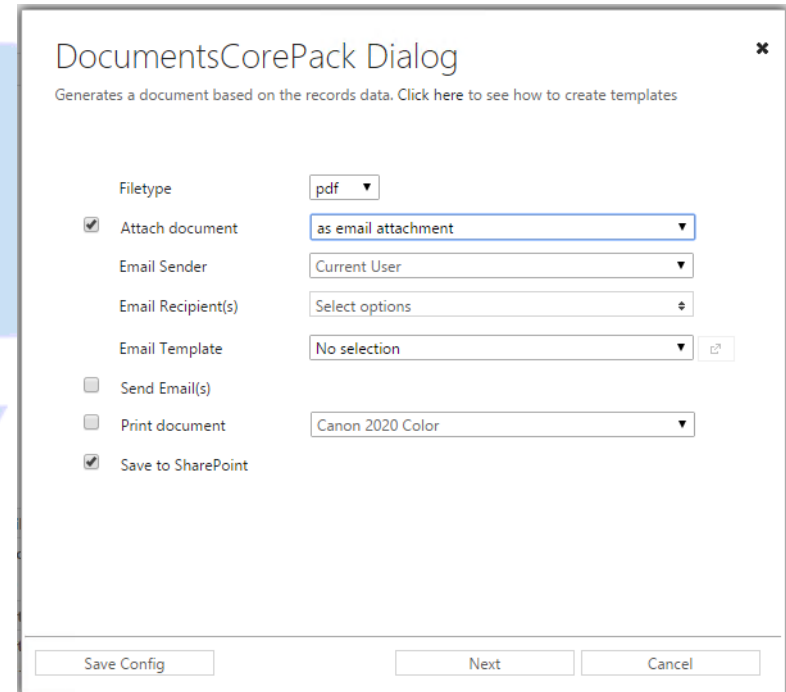
MS Word based templates provided via DocumentsCorePack template designer

- **Step 2: Choose document purpose**

- File Format
- Attach as note or letter
- Start eSignature process
- Save to SharePoint
- Print
- ...

- **Step 3: Preview and Finish**

Instant-Preview within Dialog and option to edit document if necessary



The screenshot shows a dialog box titled "DocumentsCorePack Dialog" with a close button (X) in the top right corner. Below the title is a subtitle: "Generates a document based on the records data. Click here to see how to create templates". The dialog contains several configuration options:

- Filetype:** A dropdown menu set to "pdf".
- Attach document:** A checked checkbox followed by a dropdown menu set to "as email attachment".
- Email Sender:** A dropdown menu set to "Current User".
- Email Recipient(s):** A dropdown menu set to "Select options".
- Email Template:** A dropdown menu set to "No selection" with a small "e" icon to its right.
- Send Email(s):** An unchecked checkbox.
- Print document:** An unchecked checkbox followed by a dropdown menu set to "Canon 2020 Color".
- Save to SharePoint:** A checked checkbox.

At the bottom of the dialog, there are three buttons: "Save Config", "Next", and "Cancel".

The Document Generation Wizard

Value: Create and process documents right from the CRM Commandbar in three steps

- **Step 1: Select template**

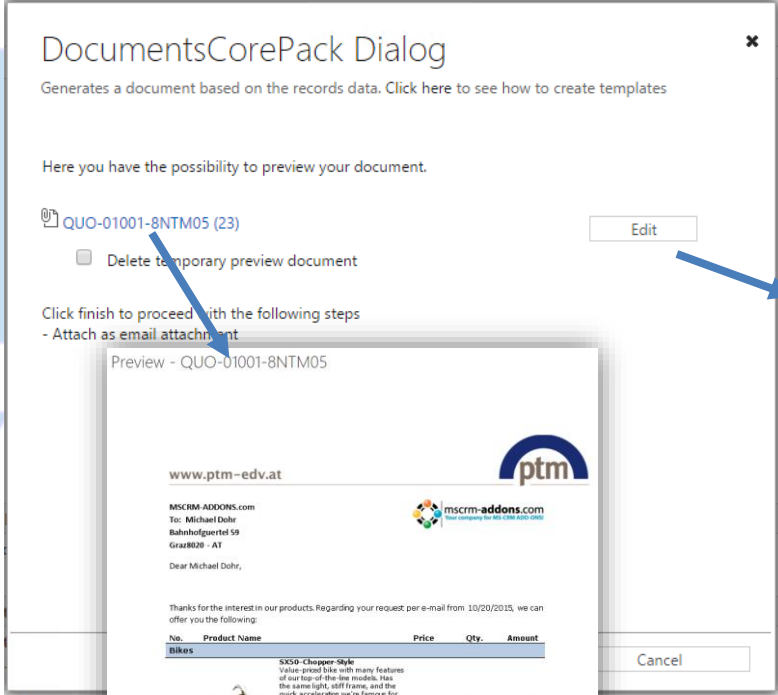
MS Word based templates provided via DocumentsCorePack template designer

- **Step 2: Choose document purpose**


- File Format
- Attach as note or letter
- Start eSignature process
- Save to SharePoint
- Print
- ...


- **Step 3: Preview and Finish**

Instant-Preview within Dialog and option to edit document if necessary





The screenshot shows a '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, it says 'Here you have the possibility to preview your document.' There is a document icon labeled 'QUO-01001-8NTM05 (23)' with an 'Edit' button next to it. A checkbox labeled 'Delete temporary preview document' is also present. Below this, it says 'Click finish to proceed with the following steps - Attach as email attachment'. A blue arrow points from the 'Edit' button to a Microsoft Word icon on the right. Another blue arrow points from the 'Delete temporary preview document' checkbox to the 'Preview - QUO-01001-8NTM05' window. The preview window shows a document with the following content:

www.ptm-edv.at 

MSCRM-ADDONS.com 

To: Michael Dohr
Bahnhofgürtel 59
Graz 8020 - AT
Dear Michael Dohr,

Thanks for the interest in our products. Regarding your request per e-mail from 10/20/2015, we can offer you the following:

No.	Product Name	Price	Qty.	Amount
1006	 SKSD - Chopper-Style Value-priced bike with many features of our top-of-the-line models. Has the same light, stiff frame, and the quick acceleration we're famous for. Frame: aluminum 3.1 / 28 Aero Tubing: Alloy / 7005 Triple Butted, hydroformed Color: gold Weight: 25.5 kg Seat tube: 31.6 mm	€ 1.500,00	1,00	€ 1.500,00
1004	 SKSD City sample Entry level adult bike; offers a comfortable ride cross-country or down the block. Quick-release hubs and tires. -Frame: Cuprum 2 DVA -Tubing: Gettard / 280 double set -Color: blue-gray -Weight: 18,2kg -Seat tube: 36,8 mm	€ 600,00	1,00	€ 600,00

Feld Mountain-Standard, Heri
Suitable for any type of riding, on or off-road. ETR, also, bestfont, Smooth.

Defining Commands: How it works

Save Configuration: As a CRM admin you can predefine a configuration and most option through with the Document Generation Wizard.

What options does it provide?

- Set default configuration
- Fix template selection
- Ability to define behaviour for each setting:
 - FileTypes
 - Attachment options
 - Print
 - Save to SharePoint,....
- Enable/Disable document preview
- Define Name and Description of Command
- Behavioural settings: (global and individually)
 - Set as default
 - Hide
 - Disable

The image shows two overlapping dialog boxes from a software application. The top dialog is titled "DocumentsCorePack Dialog" and contains settings for document generation, such as Filetype (pdf), Attach document (as email attachment), Email Sender (Current User), and Email Recipient(s) (Select options). The bottom dialog is titled "Save Configuration" and contains options for saving the current settings, including checkboxes for "Set as default configuration", "Use selected template", "Review your document", "Create PNG Preview", "Allow document edit", "Open Document", and "Override Behavior". It also has text input fields for "Name" and "Description", and a dropdown menu for "Behavior" set to "Set configured settings as default". A "Save" button is visible at the bottom right of the "Save Configuration" dialog.

Demo Part 1: Document Generation Options

Topics covered:

- A walk through of the options for setting up the Dialog setting

Demo 2: Defining One-Click Actions / Commands

Topics covered:

- How to use what we learned above to create one click actions.

Demo Part 3: Showcase of popular Processes

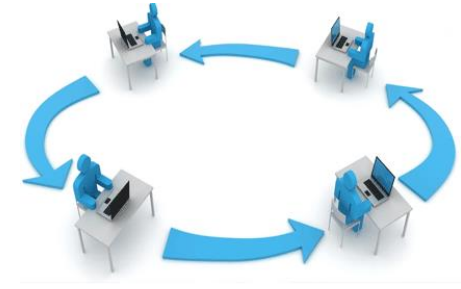
Topics covered:

- A showcase of preconfigured process
 - Create Account-Summary (printing and save to SharePoint)
 - Quoting with Preview
 - Contact reconnect email with attachments
 - Batch shipping label creation



Roadmap

- **Trigger Workflows from Dialog**
Fire a workflow after document generation was triggered. e.g send email to supervisor etc.
Schedule: October 2015
- **Create Outlook Messages**
new *.eml File type to select from
Schedule: October 2015
- **AssureSign integration**
Schedule: November 2015



Thank You


Feel free to join our upcoming Webinars!


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Resources:

- You can find us on the web at <http://www.mscrm-addons.com>
- Help-Center (Live-Chat, Support): <http://www.mscrm-addons.com/Support.aspx>
- Don't forget we have an awesome blog at <http://blogs.mscrm-addons.com/>, you'll find it to be a helpful resource!

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