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DocumentsCorePack for Dynamics 365 Essentials

Getting Started

What you need to know



1. Prepare install

- Dynamics Administrative User
- Dynamics 365 URL
- SharePoint
 - Document Management setup and configured
 - SharePoint Admin User



2. Install & Configure

1. Solution import & Azure Service setup
 - Appsource
 - mscrm-addons Website
 - On Premise: Download from our website
2. Template Designer
 - Download from our website



3. Next Steps

- 14 day trial Mode
- Test with pre-built templates
- Design your templates
- Setup One-Click Actions
- Configure document automation

Helpful Links

Start a trial: [DocumentsCorePack on Microsoft AppSource](#)
Install Guide: [DocumentsCorePack Documentation Library](#)

Document Generation and Processing



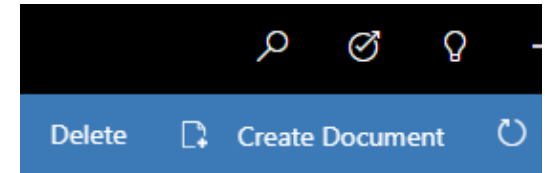
Dialog

- 3 Step-document wizard
 - Template Selection
 - Define processing
 - Review & Edit
- *User Prompts*
- Triggered by users via CommandBar
- Batch & Single record processing
- Holds **ALL** document generation and processing options



One-Click Actions

- Standardize & Simplify Dialog
- Predefine document processes for your users
- Fully customizable settings
 - Set default Disable
 - Preconfigure & Hide
 - Preconfigure & Show
- **Workbooks & Multipart documents**



Number of Employees



DocumentsCorePack Dialog

Generates a document based on the records data. [Click here](#) to see how to create templates

Filetype	pdf
<input checked="" type="checkbox"/> Attach document	as email attachment
<input type="checkbox"/> Open in local email client	
Email Sender	Current User
Recipient(s)	NDA Company (this record)
Email Template	No selection
<input type="checkbox"/> Send Email(s)	
<input type="checkbox"/> Print document	HPDS196D
<input checked="" type="checkbox"/> Save to SharePoint	
<input type="checkbox"/> Run workflow	Account_on_demand

Save Config Next Cancel

Helpful Links

One Click Actions:

[Step by Step: Configuring One-Click-Actions](#)

Multipart documents:

[Step by Step: Configuring Workbooks](#)

Document Automation

Automate documents via Dynamics 365 Workflows or Microsoft Flow



Value:

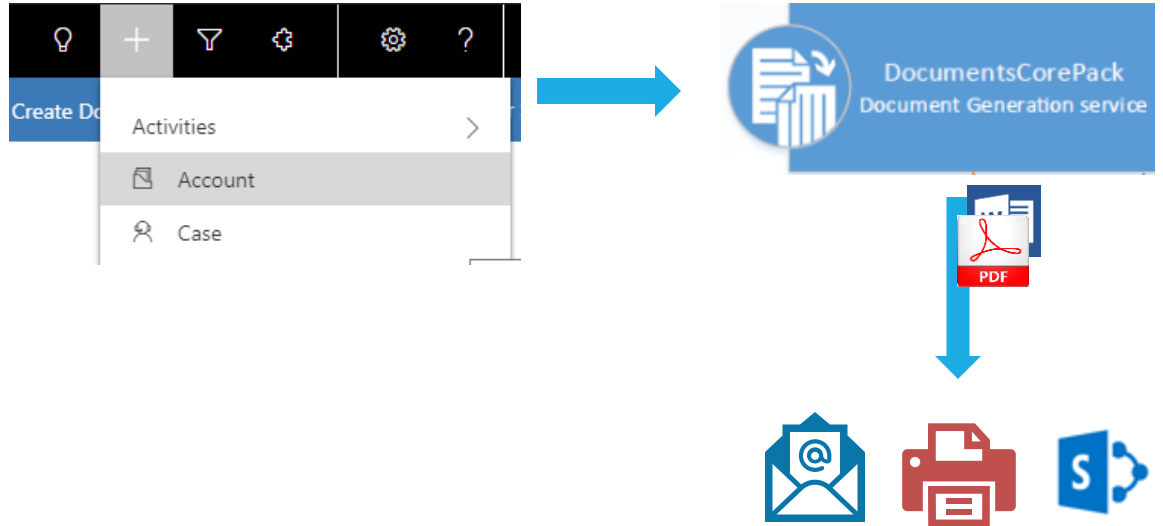
- Full automation leading to less clicks and user errors
- Standardization documents & processes

Use Cases:

- Payment / Shipping confirmations
- Quotes & Invoices sent upon activation
- Scheduled Reports (daily, weekly monthly reports)

How it works

1. An Event occurs triggering a Customer engagement Workflow or Flow
 - Create, Update, Delete records
 - Change Values (activate quote, mark items as shipped...)
2. The Workflow / Flow has a document generation & processing request
3. The service processes the request accordingly



Helpful Links

- Workflow Setup: [Workflow Setup and Configuration steps](#)
Scheduled Report: [How To Create Scheduled Reports](#)

Demo

Step-by-Step Live Demo

Part 1) Go over the setup and installation DocumentsCorePack Server, creation of the Service and installation of the DocumentsCorePack Template Designer.

Part 2) Designing your first template

Part 3) Document Generation using the DocumentsCorePack Dialog.

Part 4) Simplifying Document Generation via a OneClickAction

Part 5) Automation via a WorkFlow.

Thank you!

Support & Contact

- 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://www.mscrm-addons.com/Blog>, you'll find it to be a helpful resource!

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