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How to create professional quote templates for
MS Dynamics CRM in 25 minutes

DocumentsCorePack

Unified document solution: Creation – Processing - Automation

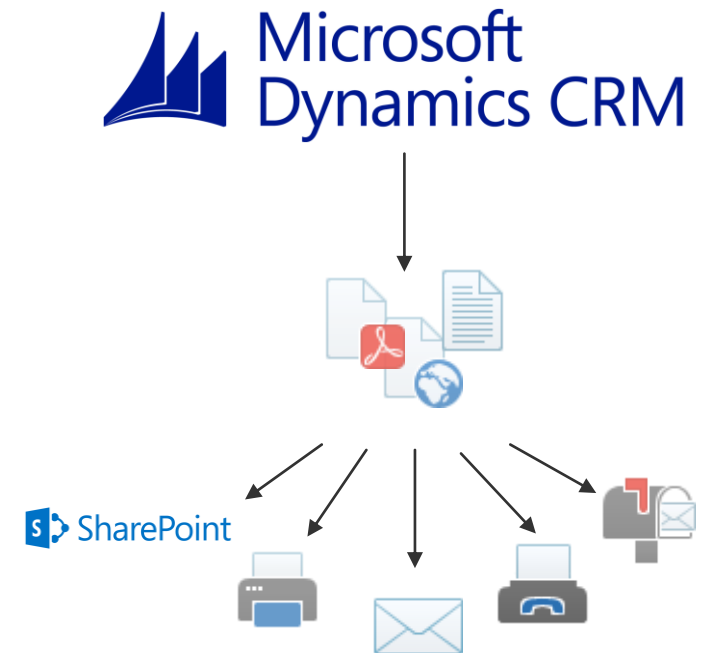
Goal: simplify and streamline document-related business operations in Microsoft Dynamics CRM

- Professional document generation

- MS Word Based Templates, no SSRS needed
- All common file-types supported
- Powerful CRM connector: Custom entities & attributes, multi-relation-support, calculations, QR-codes, dynamic pictures...

- Processing Capabilities

- Mailing (generate attachments and email content)
- eSignature-integration (DocuSign, AssureSign)
- Sharepoint integratoin
- Printing
- Attach as note
- Attach to email or letter
- ...



Template Design

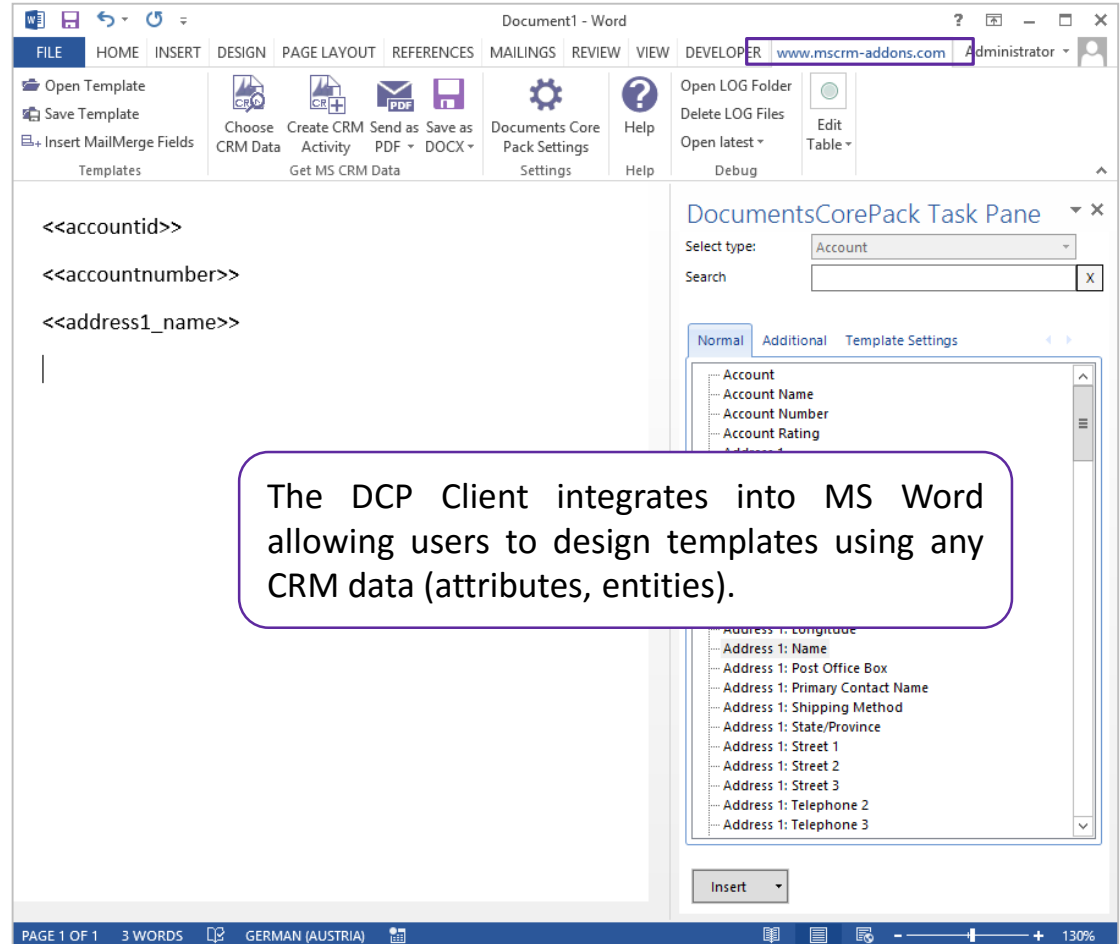
MS Word based Template Designer

Template Features

- All entities (standard and custom)
- All data-types supported
- Unlimited support for relationships
 - Multi-level

Special-features:

- Embedding documents
- Embedding pictures (web or static)
- Computed fields
- QR-Codes
- Embedding HTML
- Multipart-documents
- ...



The DCP Client integrates into MS Word allowing users to design templates using any CRM data (attributes, entities).

Demo

Using the DocumentsCorepack Template Designer

Disclaimer

I have been supporting and creating templates for DocumentsCorePack for 3 years. Your results may vary but with practice you too can create templates as quick.

Creating a standard Quote Template

- Create a Quote Template
- Save it back to CRM
- Test it with Server Side Document Generation

Thank You

Support & Contact

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>
- Do not 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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