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Document Automation in Dynamics CRM

# Document Automation

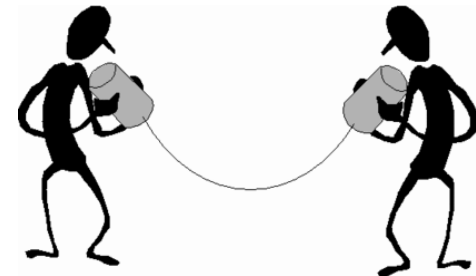
## The value of Automation

- Reduce User Workload
- Reduce Errors by standardized processes
- Speeds up processes
  - CRM Workflows are faster than users, no delay
- Standardizes internal and external communication
  - Clean consistent data and documents throughout the CRM system



### Examples:

- Payment Confirmations
  - Order/Shipping notifications
  - Scheduled reports
    - List of Opportunities closed this week every Friday.
  - Welcome packages for new website-registrations or customers
- 
- CRM has some nice out of the box capabilities



# Document-Automation with DocumentsCorePack for Microsoft Dynamics CRM

## How it works

1. A process (workflow or dialog) is started on demand or by an event (e.g. contact created) inside MS CRM.
  - Invoice status changed
  - Lead generate
  - ...
2. Document generation:
  - doc, docx, pdf, txt, html, jpg, bmp, png
  - Create email attachment AND content
3. Processing the document:
  - Send by Email
  - Save back to CRM or SharePoint
  - print the generated documents.
  - ...



# Demo

## DocumentsCorePack Dialog Automation Tips and Automated Payment Confirmation

Part 1) Show a quick DocumentsCorePack Dialog Automation Tips

Part 2) Setup a Workflow that sends a basic email once an invoice is marked as “paid”

Part 3) Enhance workflow by generating a professional PDF-Attachment

Part 4) Enhance workflow by generating a professional E-Mail content  
(Bypass limitations of standard CRM Email templates)

# Blanchard and Company, Inc.

## Full Automation of Order and Shipping documents

*“Blanchard and Company, Inc. is leveraging the MSCRM-ADDONS Documents Core Pack and AutoMerge Addons to handle **several critical business communications and document management tasks**. We at Blanchard are very pleased with the product and would highly recommend mscrm-addons products to anyone looking for a robust yet flexible document merge and delivery solution. “*

**Ed Glover, Blanchard Company, Inc.**



*“With DocumentsCorePack, we were able to deliver a solution to meet an important requirement for Blanchard and Company, Inc. **Order and shipping documents are now created and sent for delivery seamlessly through CRM** by leveraging the DocumentCorePack.”*

**Scott Sewell, Hitachi Solutions**



[http://www.mscrm-addons.com/images/CaseStudy/Blanchard/CaseStudy\\_Blanchard\\_and\\_Company\\_DocumentsCorePack.pdf](http://www.mscrm-addons.com/images/CaseStudy/Blanchard/CaseStudy_Blanchard_and_Company_DocumentsCorePack.pdf)

# 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!

### Contact:



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