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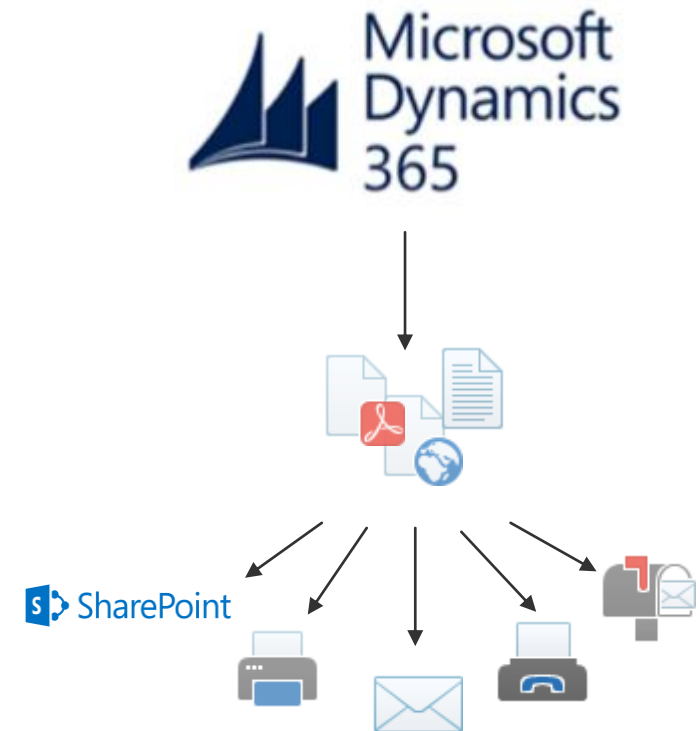
DocumentsCorePack
for
Microsoft Dynamics 365

DocumentsCorePack

Unified document solution: Creation – Processing - Automation

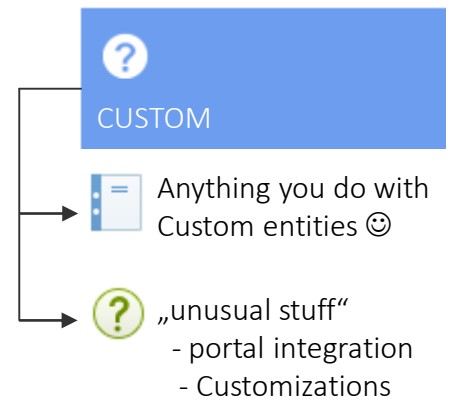
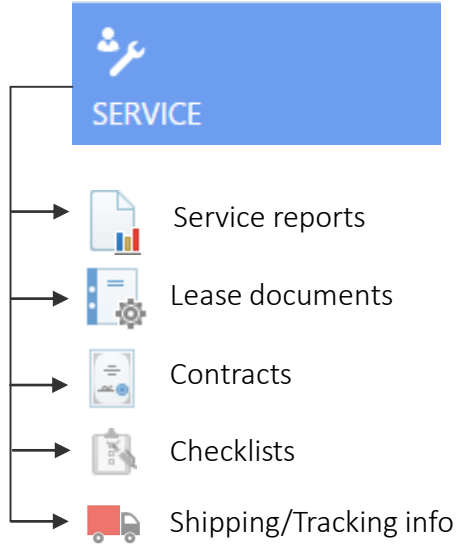
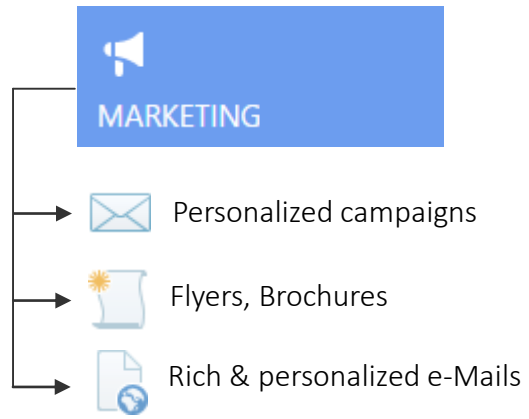
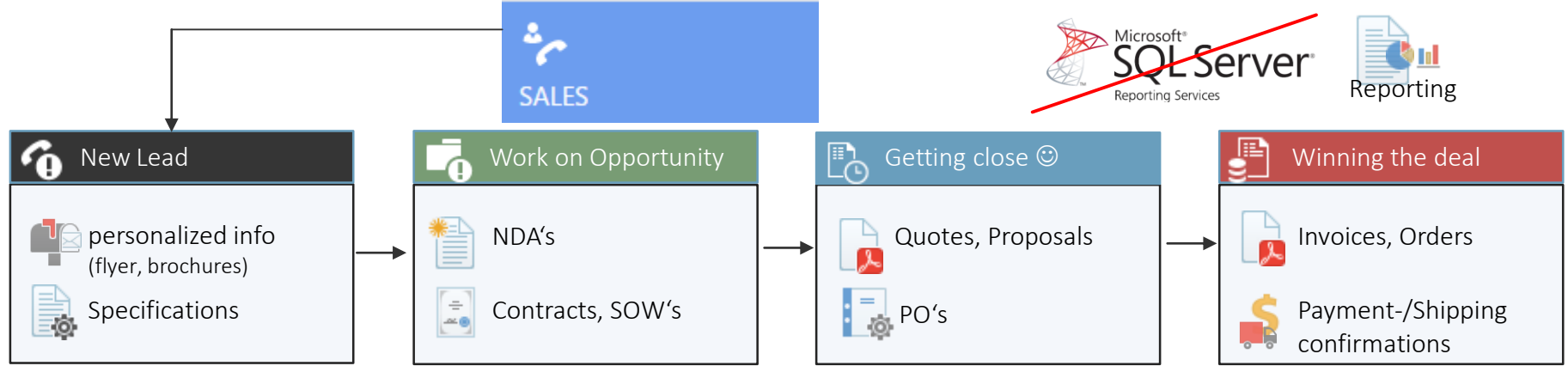
Goal: simplify and streamline document-related business operations in Dynamics 365

- Professional document generation
 - Microsoft Word Based Templates, no SSRS needed
 - All common file-types supported
 - Powerful Dynamics 365 connector: Custom entities & attributes, multi-relation-support, calculations, QR-codes, dynamic pictures...
- Processing Capabilities
 - Mailing (generate attachments and e-Mail content)
 - E-Signature integration (DocuSign, AssureSign)
 - SharePoint integration
 - Printing
 - Attach as note
 - Attach to e-Mail or letter
 - ...



Documents in a Dynamics 365 environment

The need of document generation in Dynamics 365



How it works

Where are documents generated?

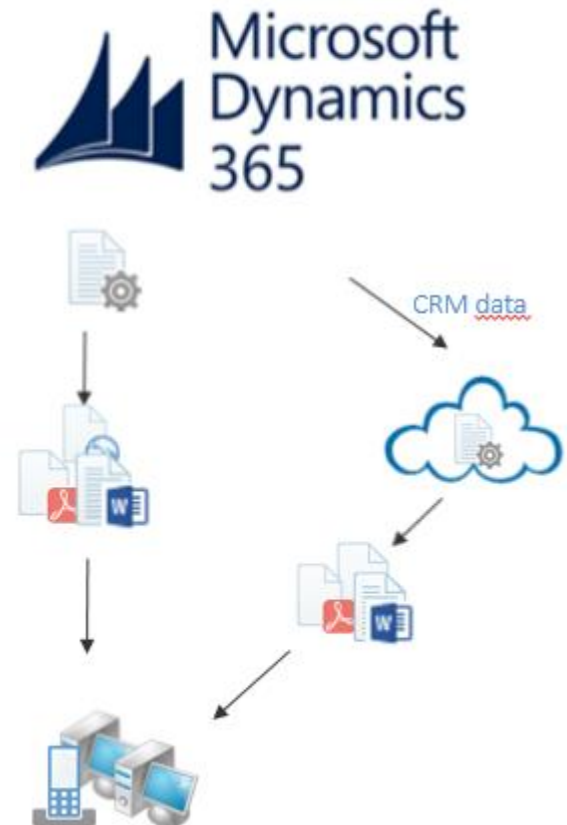
- Plugins inside Dynamics 365 instance
- Document Generation Service (running local or on the Cloud)

How to initiate the document generation?

- Dynamics 365 Commandbar: Document Generation Wizard
 - 3 steps (Select report, choose document purpose, review)
 - Commands & One-Click actions
- Workflow-integration: Document Automation
 - Automated business processes (e.g. Shipping confirmations)
 - Scheduled reports

Supported platforms

- CRM On-Premise, Online and hosted (IFD environments)
- CRM 3.0, 4.0, 2011, 2013, 2015, 2016
- Microsoft Dynamics 365



The Document Generation Wizard

User driven process from CommandBar: Select report, select purpose, review

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

Search:

Name	Category	Group
Account Reconnect.docx		General
Account Reconnect_Test.docx		General
Account_Overview.docx		General
Account_Overview_Test.docx		General
Account_QR_Template.docx		General
Contemporary Letter.docx		General
Labeltemplate_Account.docx		General
Labeltemplate_All_Contacts.docx		General
List of Accounts related to this Account.docx		General
List of Accounts related to this Account_Test.docx		General

Next Cancel

CommandBar-Integration: Create and process documents straight from the Dynamics 365 CommandBar by making use of our single and multi-record enabled dialog.

Document-Automation

Automated document generation and processing in Dynamics 365 Processes

1. - 2. A process (workflow or dialog) is started on demand or by an event (e.g. contact created) inside Dynamics 365. Inside the process, DocumentsCorePack can be configured to generate and process documents in several ways.



3. Document generation:

- doc, docx, pdf, txt, html, jpg, bmp, png

4. Processing the document:

- Save back to Dynamics 365 or SharePoint
- Print the generated documents
- Attach the document to an e-Mail and
- send it to the customer
- ...

Template Design

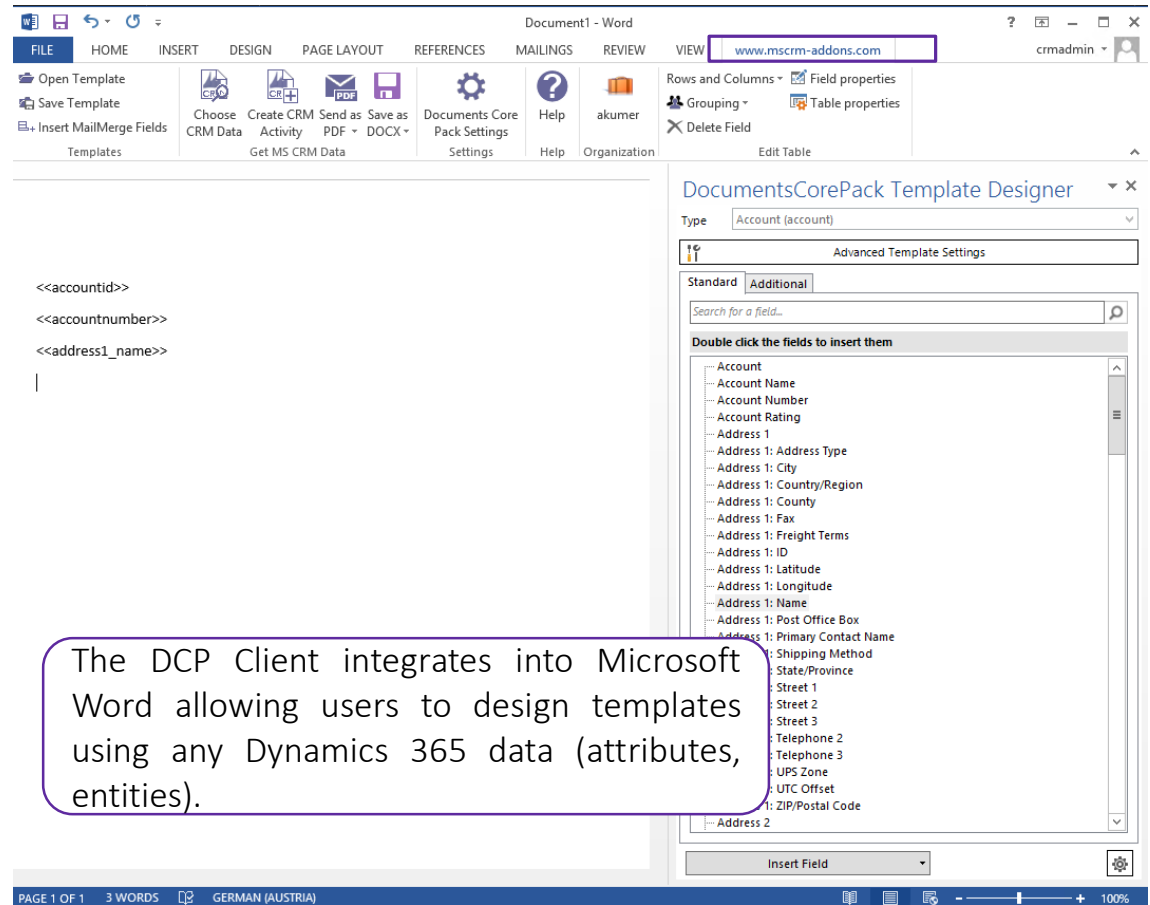
Microsoft Word based Template Designer

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
- ...



Getting Started

Local installation (On-Premise and IFD Deployments)

1. Download DCP-Server and DCP-Client from our website

On-Premise: <http://www.mscrm-addons.com/Downloads.aspx>

Online: [AppSource](#)

2. Install DCP-Server (single install)

You can install the server component on any PC that will then act as the host to the global configuration and licensing.

3. Install DCP-Client

You will have to install the client on one PC to start designing and uploading templates.

Install & User-guides: <http://www.mscrm-addons.com/Support/Documentation.aspx#DCP>

1. That's it! Our solution will run in trial mode for 14 days automatically

If you need an extension for a customer, contact our support team and ask for keys!

Info: <http://www.mscrm-addons.com/Products/DocumentsCorePack>

Mscrm-addons.com is fully supporting trials – If you have any questions, don't hesitate to get in touch with our support team via

- Live-Chat (available 17 hours a day)

- Email to support@mscrm-addons.com

Getting Started

Cloud-based version (Dynamics 365 Online and IFD Deployments)

Watch our Getting started-video: <https://www.youtube.com/watch?v=q3aMZW3koCc&autoplay=1>

1. Create a new DocumentsCorePack Service on our website

Direct link: <http://www.msrm-addons.com/Products/MSCRM2013/DocumentsCorePack/CloudServiceConfiguration.aspx>

2. Download and Install DCP-Client

You will have to install the client on one PC to start designing and uploading templates to your Dynamics 365 system.

3. That's it! Our solution will run in trial mode for 14 days automatically.

If you need an extension for a customer, contact our support team and ask for keys!

Info: <http://www.msrm-addons.com/Products/DocumentsCorePack>

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Retail – Pricing (Local Installation)

On-Premise and IFD Deployments

- License model: **Perpetual**
- *Support & Maintenance is included for the first year.
- One template designer license is included in each package for server-based document generation.

Server-based document generation	Initial costs	Support & Maintenance*
XS (1 – 10 User)	\$ 800	\$ 160
S (11 – 30 User)	\$ 1,500	\$ 300
M (31 – 80 User)	\$ 3,700	\$ 740
L (81 – 140 User)	\$ 6,200	\$ 1,240
XL (141 – 300 User)	\$ 12,500	\$ 2,500
XXL (301 – 600 User)	\$ 23,600	\$ 4,720
Enterprise (600+ User)	On request	20 % of intial costs

Additional Template Designer licenses	Price per user	Support & Maintenance*
Price per additional license	\$ 140	\$ 34

Retail – Pricing (Cloud Service)

Online and IFD Deployments

- License model: **Subscription**
- Support & Maintenance is included.
- One Template Designer license is included in each package for server-based document generation.

Server-based document generation	Monthly cost billed month-to-month	Monthly cost billed annually
XS (1 – 10 User)	\$ 56	\$ 588
S (11 – 30 User)	\$ 99	\$ 1,068
M (31 – 80 User)	\$ 169	\$ 1,788
L (81 – 140 User)	\$ 229	\$ 2,388
XL (141 – 300 User)	\$ 459	\$ 4,688
XXL (301 – 600 User)	\$ 869	\$ 9,108
Enterprise (600+ User)	On request	On request
Additional Template Designer license	Monthly cost billed month-to-month	Monthly cost billed annually
Price per license	\$ 7	\$ 5.95

Thank You

Resources & Contact

- You can find us on the web at <http://www.mscrm-addons.com>
- Get free trials and additional information on our addons on [AppSource](#)
- Help-Center (Live-Chat, Support): <http://www.mscrm-addons.com/Support.aspx>
- Do not forget we have an awesome blog at <http://www.mscrm-addons.com/Blog>
- Follow us on Twitter: <https://twitter.com/mscrmaddons> or Facebook: <https://www.facebook.com/mscrmaddons>



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