DocumentsCorePack for Microsoft Dynamics CRM
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 Integration
  - Printing
  - Attach as note
  - Attach to email or letter
  - ...

[msscrm-addons.com](https://msscrm-addons.com)
Your company for MS-CRM ADD-ONS!
Documents in a CRM environment

**SALES**
- New Lead
  - Personalized info (flyer, brochures)
  - Specifications
- Work on Opportunity
  - NDA’s
  - Contracts, SOW’s
- Getting close 😊
  - Quotes, Proposals
  - PO’s
- Winning the deal
  - Invoices, Orders
  - Payment-/Shipping confirmations

**MARKETING**
- Personalized campaigns
- Flyers, Brochures
- Rich & personalized emails

**SERVICE**
- Service reports
- Lease documents
- Contracts
- Checklists
- Shipping/Tracking info

**CUSTOM**
- Anything you do with Custom entities 😊
- “unusual stuff“
  - Portal integration
  - Customizations

*mscrm-addons.com*
*Your company for MS-CRM ADD-ONS!*
How it works

Where are documents generated?

- Plugins inside MS CRM instance
- Document Generation Service (running local or on the Cloud)

How to initiate the document generation?

- CRM 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)
CommandBar-Integration: Create and process documents straight from the MS CRM CommandBar by making use of our single and multi-record enabled dialog.
1. - 2. A process (workflow or dialog) is started on demand or by an event (e.g. contact created) inside MS CRM. 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 CRM or SharePoint
- print the generated documents.
- Attach the document to an email and send it to the customer.
- ...

mscrm-addons.com
Your company for MS-CRM ADD-ONS!
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
- ...
## Retail – Pricing

**CRM Online and IFD-deployments**

- License model: Subscription
- Support and maintenance included.
- One template designer license is included in each package for server-based document generation
- Reseller discounts are not included

<table>
<thead>
<tr>
<th>Server-based document generation</th>
<th>Monthly cost billed month-to-month</th>
<th>Monthly cost billed annually</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small (1-20 Users)</td>
<td>$99</td>
<td>$89</td>
</tr>
<tr>
<td>Medium (21-100 Users)</td>
<td>$229</td>
<td>$199</td>
</tr>
<tr>
<td>Large (101-300 Users)</td>
<td>$459</td>
<td>$390</td>
</tr>
<tr>
<td>Enterprise (300+ users)</td>
<td>On request</td>
<td>20% of initial costs</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Additional Template Designer license</th>
<th>Monthly cost billed month-to-month</th>
<th>Monthly cost billed annually</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price per license</td>
<td>$14</td>
<td>$11.90</td>
</tr>
</tbody>
</table>
Contact us

Support & Contact

• You can find us on the web at http://www.mscrm-addons.com


• Don’t forget we have an awesome blog at http://blogs.mscrm-addons.com/, you’ll find it to be a helpful resource!

Contact:

📞 US: +1 404 720 6066       💌 support@mscrm-addons.com
📞 Europe: +43 (316) 680 880   💌 office@mscrm-addons.com