DocumentsCorePack
for
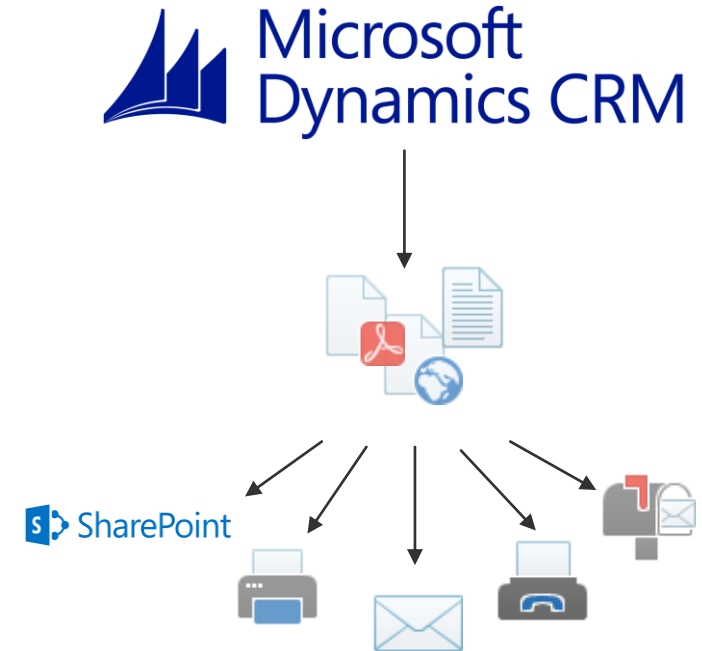Microsoft Dynamics CRM

DocumentsCorePack

Goal: simplify and streamline document-related business operations in Microsoft Dynamics CRM
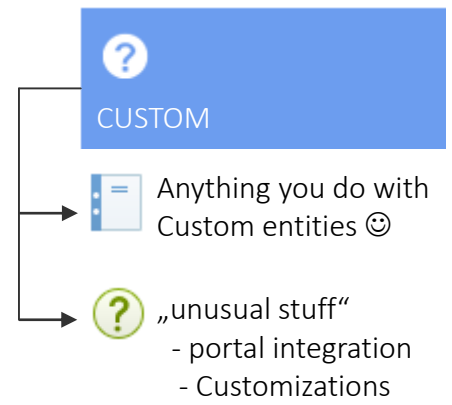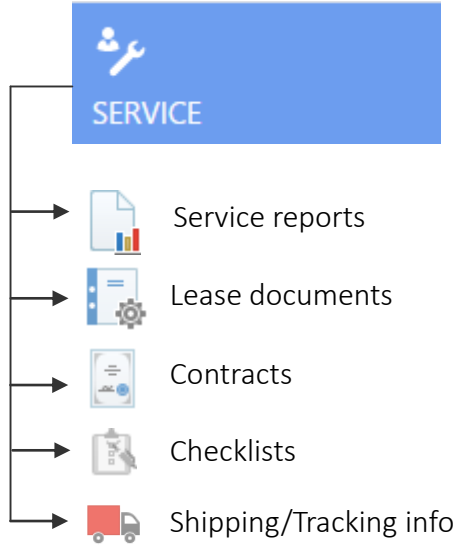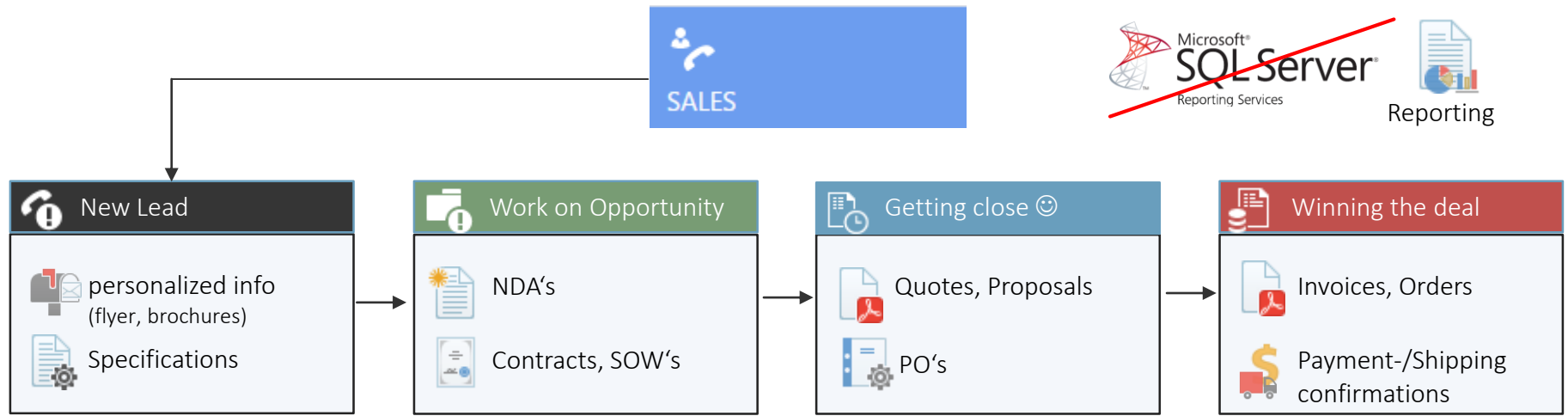
- **Professional document generation**
  - MS Word Based Templates, no SSRS needed
  - All common file-types supported
  - Powerful CRM connector: Custom entities & attributes, multi-relation-support, calculations, QR-codes, dynamic pictures…

- **Processing Capabilities**
  - Mailing (generate attachments and email content)
  - eSignature-integration (DocuSign, AssureSign)
  - Sharepoint Integration
  - Printing
  - Attach as note
  - Attach to email or letter
  - …

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Documents in a CRM environment

How it works

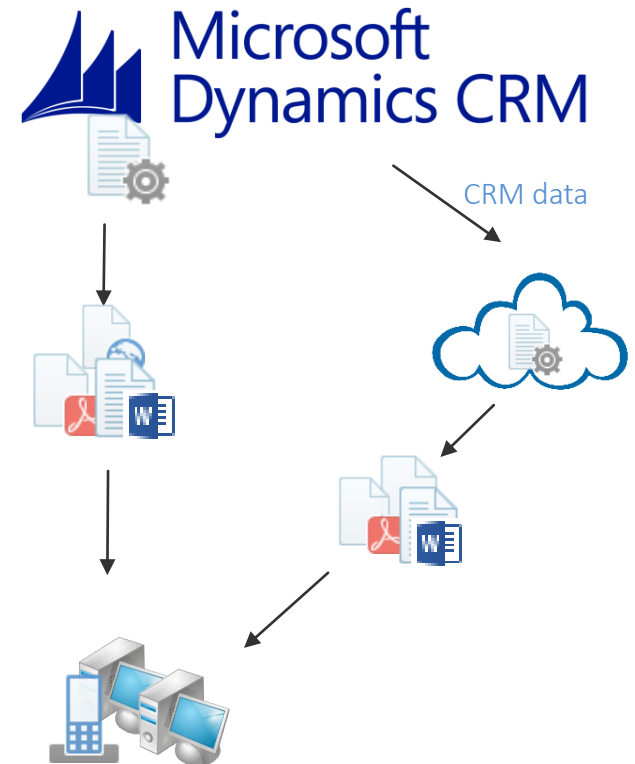**Where are documents generated ?**

- 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)
- CRM 3.0, 4.0, 2011, 2013, 2015, 2016

The doucment generation Wizard

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

Document-Automation

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.

1   Microsoft Dynamics

4

2   3

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.
- …

3. Document generation:
- doc, docx, pdf, txt, html, jpg, bmp, png

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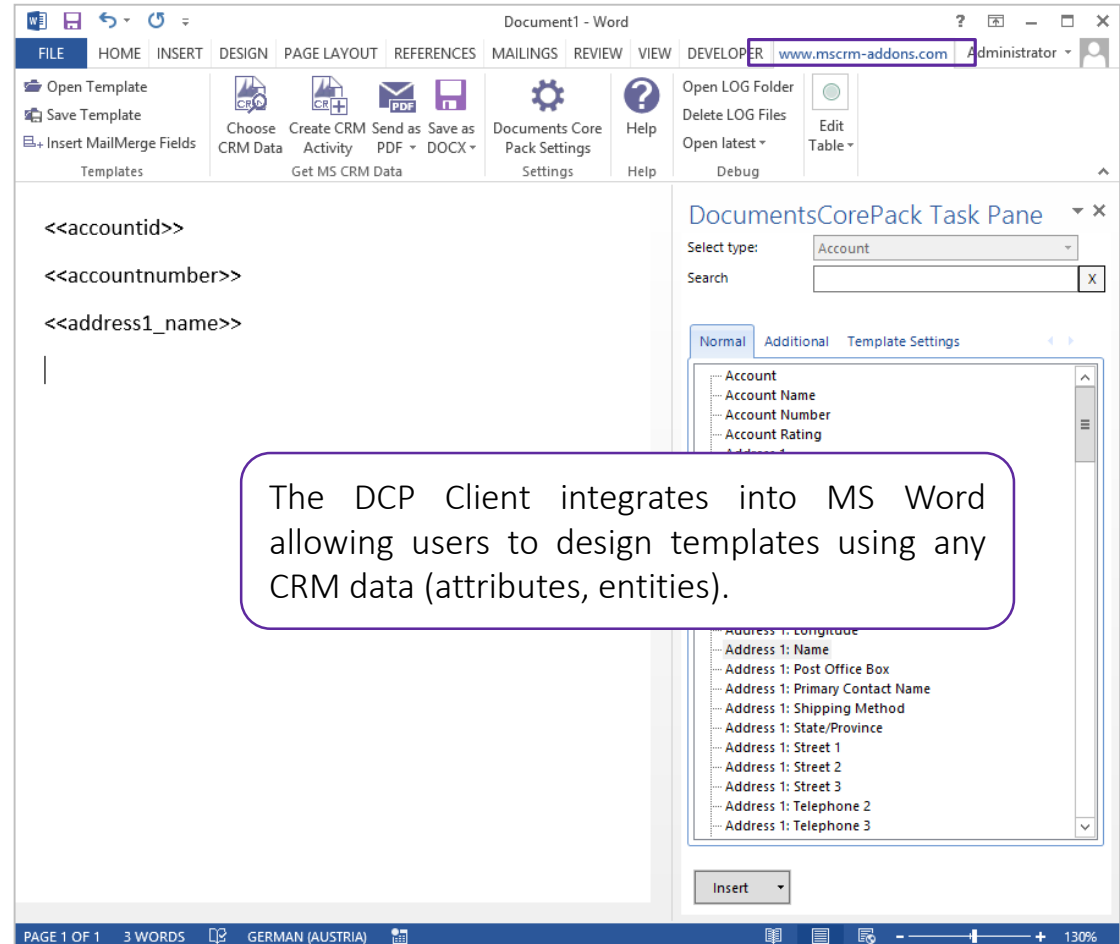
Template Desgin

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).

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 doucment generation
- Reseller discounts are not included

Server-based document generation	Monthly cost billed month-to-month	Monthly cost billed annualy
Small (1-20 Users)	$ 99	$ 89
Medium (21-100 Users)	$ 229	$ 199
Large (101-300 Users)	$ 459	$ 390
Enterprise (300+ users)	On request	20% of intial costs

Additional Template Designer license	Monthly cost billed month-to-month	Monthly cost billed annualy
Price per license	$ 14	$ 11.90

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

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