DocumentsCorePack ServerBased Getting Started from AppSource

Hello!

Thank you for your interest in DocumentsCorePack ServerBased. This Getting Started Guide will help you to install this Add-On from Microsoft AppSource. For detailed information, please take a look at our guides or blogs.

There are basically two ways to install DocumentsCorePack from AppSource:

1. Get solution from Marketplace in Dynamics 365

It is possible to open AppSource directly from Dynamics 365. Therefore, please navigate to Settings > Solutions and hit the *[Get Solutions from Marketplace]*-button, highlighted in yellow in the figure below.
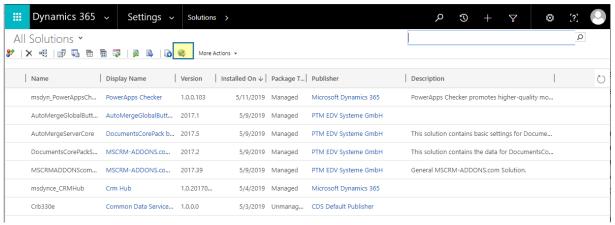

Figure 1: Get solutions from Marketplace

This leads you to the AppSource website where you can search for DocumentsCorePack and is described below.

2. Get solution from AppSource

The second option is to go to the AppSource website and search for DocumentsCorePack. Use this link to find all add-ons provided by mscrm-addons.com (figure below).
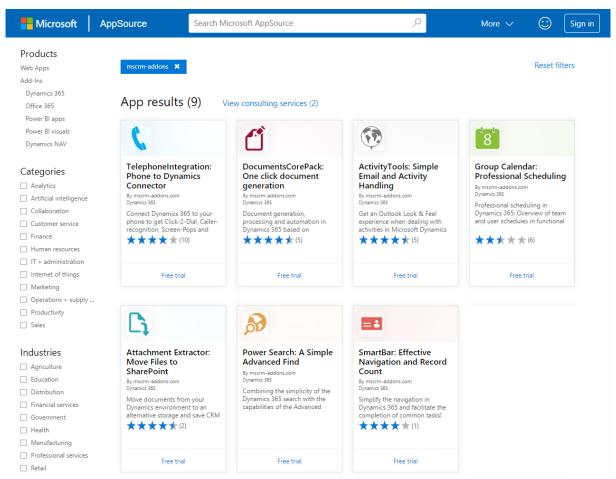

Figure 2: AppSource – solutions by mscrm-addons.com

Next, please select DocumentsCorePack. The so opened window provides you with information regarding DCP. Here, please click on the **[FREE TRIAL]**-button on the left side.
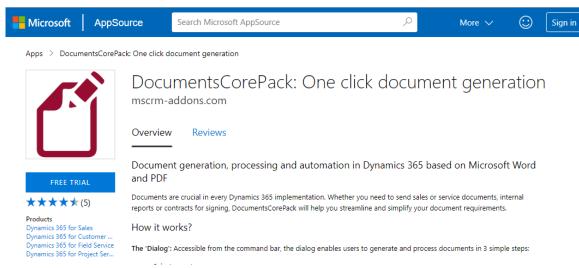

Figure 3: AppSource – DocumentsCorePack

Next, please sign into Microsoft AppSource. Enter your e-mail address and hit the *[Sign in]*-button as you can see in the figure below.
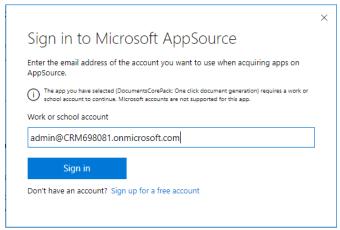

Figure 4: Sign in to Microsoft AppSource

In the window below please enter your basic profile information and check the Microsoft permission checkbox at the bottom. Click on the *[Continue]*-button to proceed.
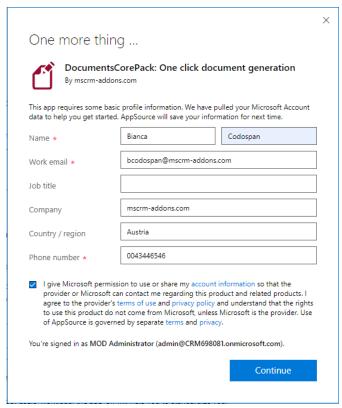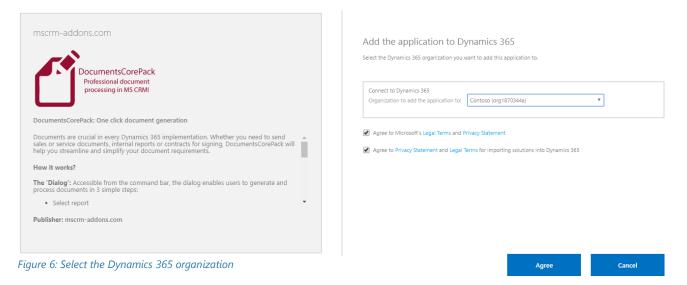

Figure 5: Enter your basic profile information

Next, please enter the Dynamics 365 organization you want to add the solution to, check the checkboxes below and hit the *[Agree]*-button.

Figure 6: Select the Dynamics 365 organization

This leads you to your organization overview. The installation takes a while – as you can see DocumentsCorePack has the Status "Installation pending" until the installation is completed (highlighted in yellow).
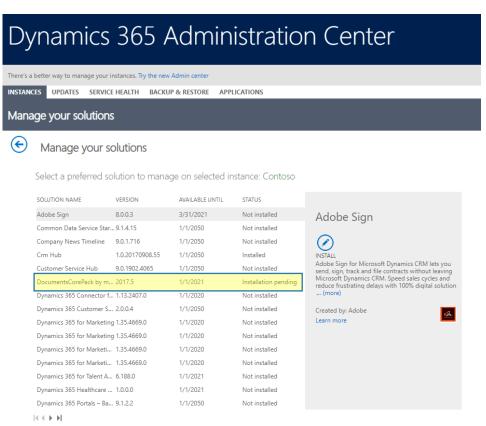

Figure 7: Organization overview – DCP installation pending

Meanwhile, you will receive an e-mail with more information about DCP and its usage.

To see when the installation is finished, please refresh the page in between. Only when the status is on "Installed" you can continue with the process (highlighted in yellow below).
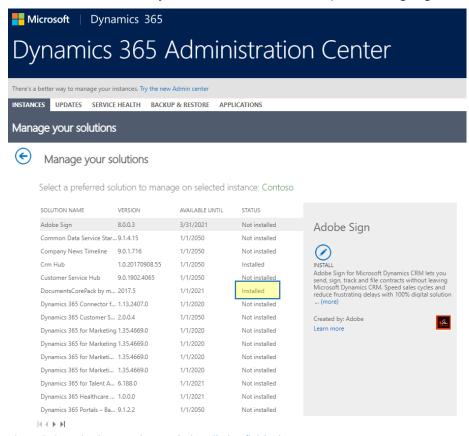

Figure 8: Organization overview – DCP installation finished

Congratulations! You have successfully completed the installation of DocumentsCorePack from Microsoft AppSource. If you now open your Dynamics 365 Settings, you will see the MSCRM-ADDONS section containing the so installed solution – DocumentsCorePack (highlighted in yellow) .
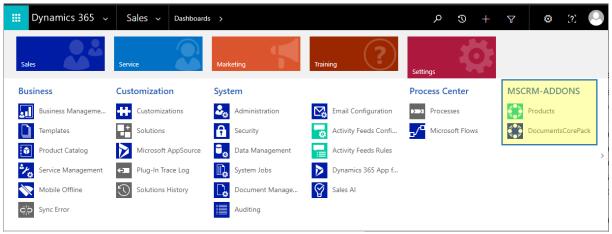

Figure 9: Dynamics 365 Settings > MSCRM-ADDONS: DocumentsCorePack

A click on DocumentsCorePack leads you to the DocumentsCorePack *Getting Started* page. Hit the **[Start]**-button in order to proceed.

Figure 10: DocumentsCorePack Getting Started page

As you can see in the figure above, you have to log in with the user that should be used to connect the service with your Dynamics 365 instance. Dynamics 365 administrator privileges are required!
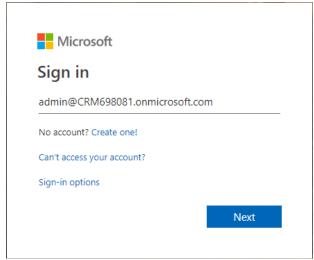

Figure 11: Login with administrator account

Once connected our wizard will automatically import solutions, create default settings, apply for security roles and create a service (see figure 10).

Accept the permissions below by checking the checkbox. With a click on the arrows on the left side, you will get a short description of the requested permissions.
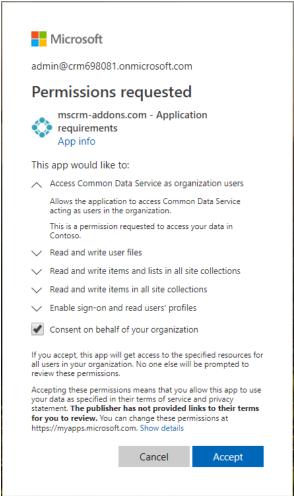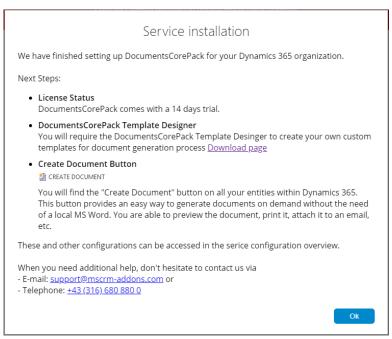

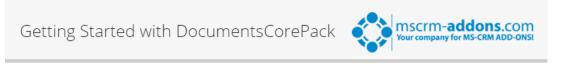*Figure 12: Accept requested permissions*

The window below pops up with information on the next steps. This means that you have finished the installation successfully.

Figure 13: Service installation information

Hit the **[OK]**-button to continue. The window below appears with information on your service.

Figure 14: Service information

Once the installation is completed, please also have a look at the DocumentsCorePack User Guide which gives you detailed explanations of all functionalities provided by DocumentsCorePack ServerBased. It aims to describe the main settings, including step-by-step descriptions about how to use all the benefits provided by our solution.

3. How to use DocumentsCorePack

Once the Add-On is installed click on the **[Create Document]**-button in the Dynamics 365 Command Bar to generate e.g. quotes and invoices.
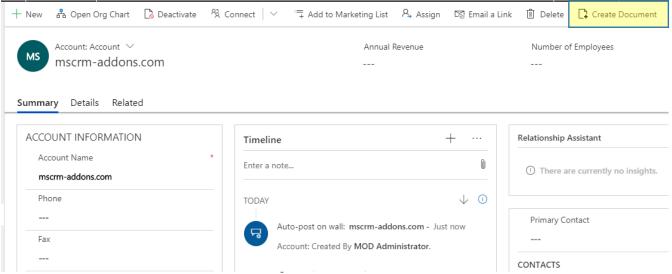

Figure 15: The Create Document functionality

1) With a click on it, the DocumentsCorePack Dialog appears. The DocumentsCorePack Dialog is an easily accessible tool to create and process documents directly within Dynamics 365. As you can see in the figure below, six standard templates come with the installation of DocumentsCorePack.
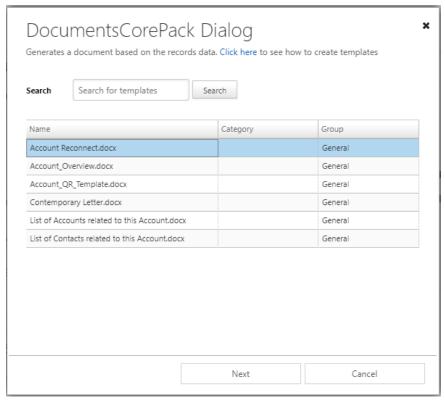

Figure 16: The DocumentsCorePack Dialog

2) Choose the appropriate template and proceed with a click on the **[Next]**-button.

3) The DocumentsCorePack Dialog contains a set of options. The options vary and change depending on the selections you perform. In this case, you simply generate a document as pdf.
   Find more information about the DCP Dialog in the [DocumentsCorePack User Guide](#) (chapter 3.2 DocumentsCorePack Dialog options). Click on the **[Next]**-button to proceed.
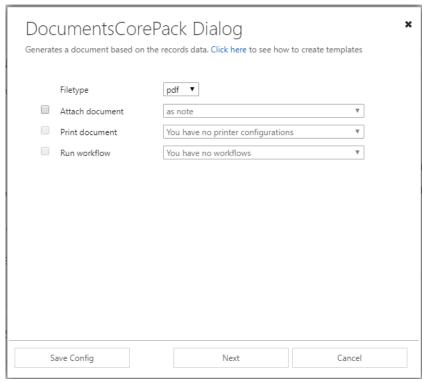

Figure 17: The DocumentsCorePack Dialog options

4) Before finishing the process, it is possible to preview the document by hitting the **[Preview]**-button, highlighted in yellow below.
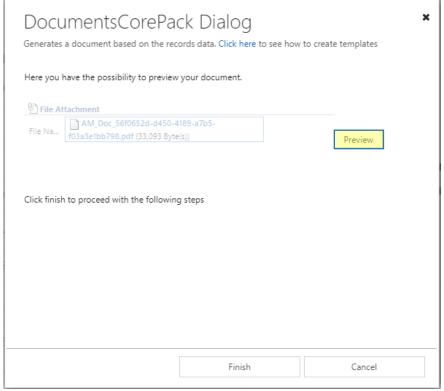

Figure 18: The DocumentsCorePack Dialog: Preview document

5) Next click on the *[Finish]*-button to complete the process. Congratulation, as you can see below, you have created your first document.

MOD Administrator

June 4, 2019

mscrm-addons.com

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To Whom It May Concern:

We have not heard from you for a while. I wanted to check in and make sure that you are still having a great experience using our product(s). I will contact you next week to get your feedback on the product(s) you are currently using and to give you details about our upcoming products.

Sincerely,

MOD Administrator

Figure 19: PDF of Account Reconnect template

4. Create your own templates

To create own custom templates, you require the DocumentsCorePack Client (Template Designer), which can be downloaded here.

The Template Designer will help you to to create templates for each Microsoft Dynamics 365 entity (for example Contact, Account, Opportunities …).

The DCP Template Designer can be easily accessed via the www.mscrm-addons.com – tab in the Microsoft Word command bar, as you can see in the figure below, and provides you with a lot of options that facilitate the creation of templates.
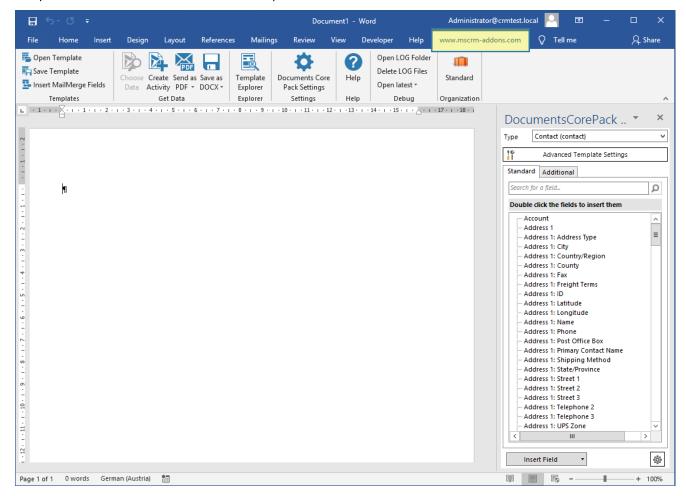

Figure 20: Microsoft Office Word with mscrm-addons ribbon

Please find more information on how to use the Template Designer in the corresponding DocumentsCorePack Template Designer guide.

License Manager

All our Add-Ons come with a 14-days trial license. Once received the license from our support-team, open the License Manager to install it. For more information, have a look at the Licensing Guide.

We hope our product is to your full satisfaction and a useful supplement to your business activities. If you have questions, please contact us via the contact information below.

License Manager

List of figures

Contact

For further technical questions, please visit our blog http://blogs.mscrm-addons.com or contact support@mscrm-addons.com.

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