



DocumentsCorePack (DCP)

Professional document generation, processing and automation in Microsoft Dynamics 365 has never been easier!

Over the years, DocumentsCorePack has evolved from a simple mail-merge solution to a tool that extends its technical possibilities using Microsoft Dynamics 365 as a basis for professional document generation and processing.

How does it work?

DocumentsCorePack bases on three major pillars in order to guarantee flexible, professional and reliable document processing:

The 'Dialog':

Accessible from the command bar, the dialog enables users to generate and process documents in 3 simple steps:

- Select a template
- Choose document action and
- Preview

The Dialog can be customized according to your business requirements.

Document Automation:

DocumentsCorePack is fully integrated into Dynamics 365 processes, like workflows or dialogs. Thus, all document generation and processing capabilities can be fully automated. Next to reducing your users' workload, the add-on will help you to standardize your internal and external documents.

Template Design:

The easy, intuitive and powerful handling of the DocumentsCorePack Template Designer extends the capabilities of Microsoft Word with an interface to Dynamics 365. Next to simple mapping of Dynamics 365 fields, it provides a lot of additional features to ensure that our tool is capable to cover your needs. It has predefined fields, so called Mail Merge Fields. These are references to attributes in the Dynamics 365 system.

General Functionalities & Document Generation/Processing Comparison Chart

(DocumentsCorePack vs. Dynamics 365 (Native) Functionalities and Processing)

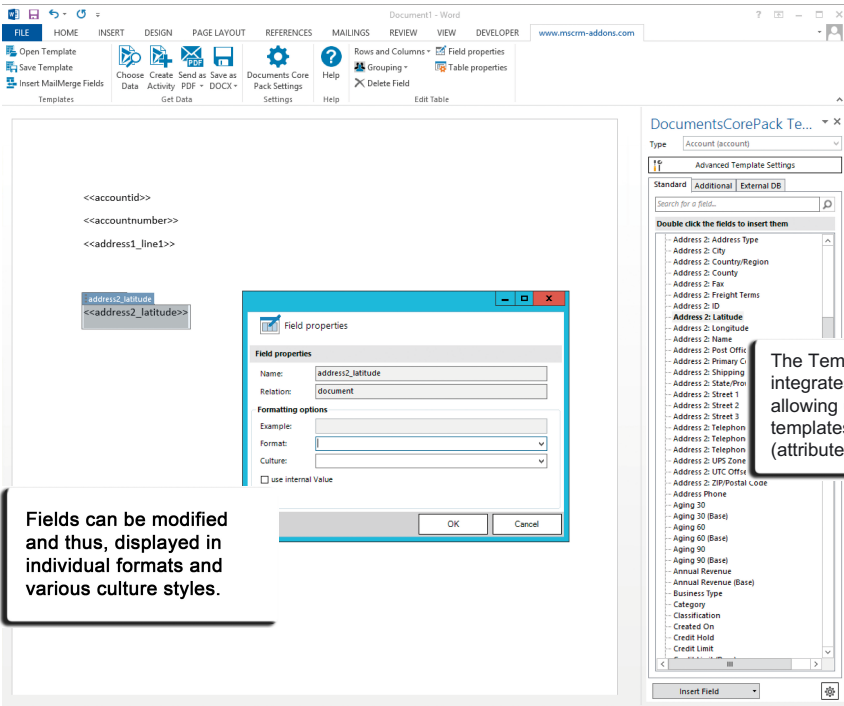
Features	DocumentsCorePack	Native document generation
running on server <ul style="list-style-type: none"> • as plugin • as separate service 	✓ ✓ ✓	✓
DocumentsCorePack Dialog	✓	✗
One click document generation	✓	✗
Create document in workflow	✓	✓
Create document with dynamic names	✓	✗
Supported file types	.docx, .pdf, .html, .txtdocx
Generate activities (e.g. email with document attached)	✓	✗
Generate e-Mail messages	✓	✗
e-Signature integration	✓	✗
Define Commands (e.g. Create document & send by email...)	✓	✗
Secure your .pdf using a password	✓	✗
Advanced security settings for .pdf-files	✓	✗
Attach to e-Mail	✓	✗
Run workflow	✓	✗
Save documents to SharePoint or local device	✓	✗
Create SharePoint locations	✓	✗
Write Metadata to SharePoint	✓	✗
Attach as note	✓	✓ Note located at primary record
Configurable save locations (SharePoint, fileshare)	✓	✗
Attach to letter	✓	✗
Print documents <ul style="list-style-type: none"> • with Network printer • with Google printer 	✓ ✓ ✓	✗ ✗ ✗
Protect fillable .pdf form fields	✓	✗
Document Preview	✓	✗
Edit documents during document generation (for quick and easy mass mailings)	✓	✗
Batch processing from Dynamics 365 Grid <ul style="list-style-type: none"> • Combine documents 	✓ ✓	✗ ✗



Template Design Comparison Chart

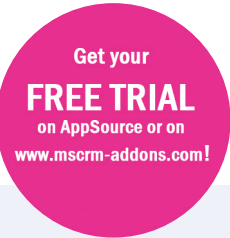
(DCP Template Design vs. Dynamics 365 (Native) Document Generation)

Features	DocumentsCorePack	Native document generation
Microsoft Word Template Designer	✓	✓
Demo templates (ready to use)	✓	✗
Support for custom entities	✓	✓
Subcategorize templates	✓	✗
Related records	✓	✗
<ul style="list-style-type: none"> Relationship-types many-to-one, one-to-many, many-to-many 	✓	✓ limited to one level
Resolve multiple relationship levels	✓	✗
Elimination of blank lines for addresses	✓	✗
Filter related records	✓	✗
Sorting	✓	✗
Grouping and Totals	✓	✗
Define document names	✓	✗
Insert Calculations	✓	✗
Insert Conditions	✓	✓
Insert Pictures	✓	✗
e-Signature Integration	✓	✗
Insert DocuSign	✓	✗
Insert AssureSign	✓	✗
Saved as note in Dynamics 365	✓	✗
Entity Images	✓	✓
Saved as web-path in Dynamics 365	✓	✗
Insert HTML	✓	✗
Insert QR Codes based on Dynamics 365 data	✓	✗
Insert dynamic hyperlinks	✓	✗
String manipulation	✓	✗
Field formatting	✓	✗
Aggregation support	✓	✗
Connect to external database	✓	✗
Creation of label templates	✓	✗
Sub-template support	✓	✗
Easy generation of tables	✓	✗
Template testing capabilities	✓	✗



Fields can be modified and thus, displayed in individual formats and various culture styles.

The Template Designer integrates into Word allowing users to design templates using Dynamics 365 (attributes, entities...)



Your benefits at a glance:

- Professional document generation from the Command Bar based on the ,Dialog'
- Document Automation via workflows and dialogs
- Various processing options supported (Attach to e-Mail or letter activity, Auto-set e-Mail recipients & subject, e-Signatures supported – like AssureSign or DocuSign, trigger workflows, save documents to SharePoint, printing, generate e-Mail content, dynamic file names...)
- Supported file formats: .pdf, .html, .docx, .doc, .txt, .xps, .png, .jpeg, .epub, .bmp, and .msg

DocumentsCorePack is available for:

Microsoft CRM 2011, 2013, 2015, 2016 Online / On Premise / Hosted (IFD), Microsoft Dynamics 365