



# 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.

The screenshot shows the 'Solutions' page in Dynamics 365. The 'More Actions' button is highlighted in yellow. The table below lists the installed solutions.

| Name                   | Display Name           | Version      | Installed On | Package T... | Publisher              | Description   |
|------------------------|------------------------|--------------|--------------|--------------|------------------------|---|
| msdyn_PowerAppsCh...   | PowerApps Checker      | 1.0.0.103    | 5/11/2019    | Managed      | Microsoft Dynamics 365 | PowerApps Checker promotes higher-quality mo...     |
| AutoMergeGlobalButt... | AutoMergeGlobalButt... | 2017.1       | 5/9/2019     | Managed      | PTM EDV Systeme GmbH   |   |
| AutoMergeServerCore    | DocumentsCorePack b... | 2017.5       | 5/9/2019     | Managed      | PTM EDV Systeme GmbH   | This solution contains basic settings for Docume... |
| DocumentsCorePackS...  | MSCRM-ADDONS.co...     | 2017.2       | 5/9/2019     | Managed      | PTM EDV Systeme GmbH   | This solution contains the data for DocumentsCo...  |
| MSCRMADDONScom...      | MSCRM-ADDONS.co...     | 2017.39      | 5/9/2019     | Managed      | PTM EDV Systeme GmbH   | General MSCRM-ADDONS.com Solution.                  |
| msdynce_CRMHub         | Crm Hub                | 1.0.20170... | 5/4/2019     | Managed      | Microsoft Dynamics 365 |   |
| Crb330e                | Common Data Service... | 1.0.0.0      | 5/3/2019     | Unmanag...   | CDS Default Publisher  |   |

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).

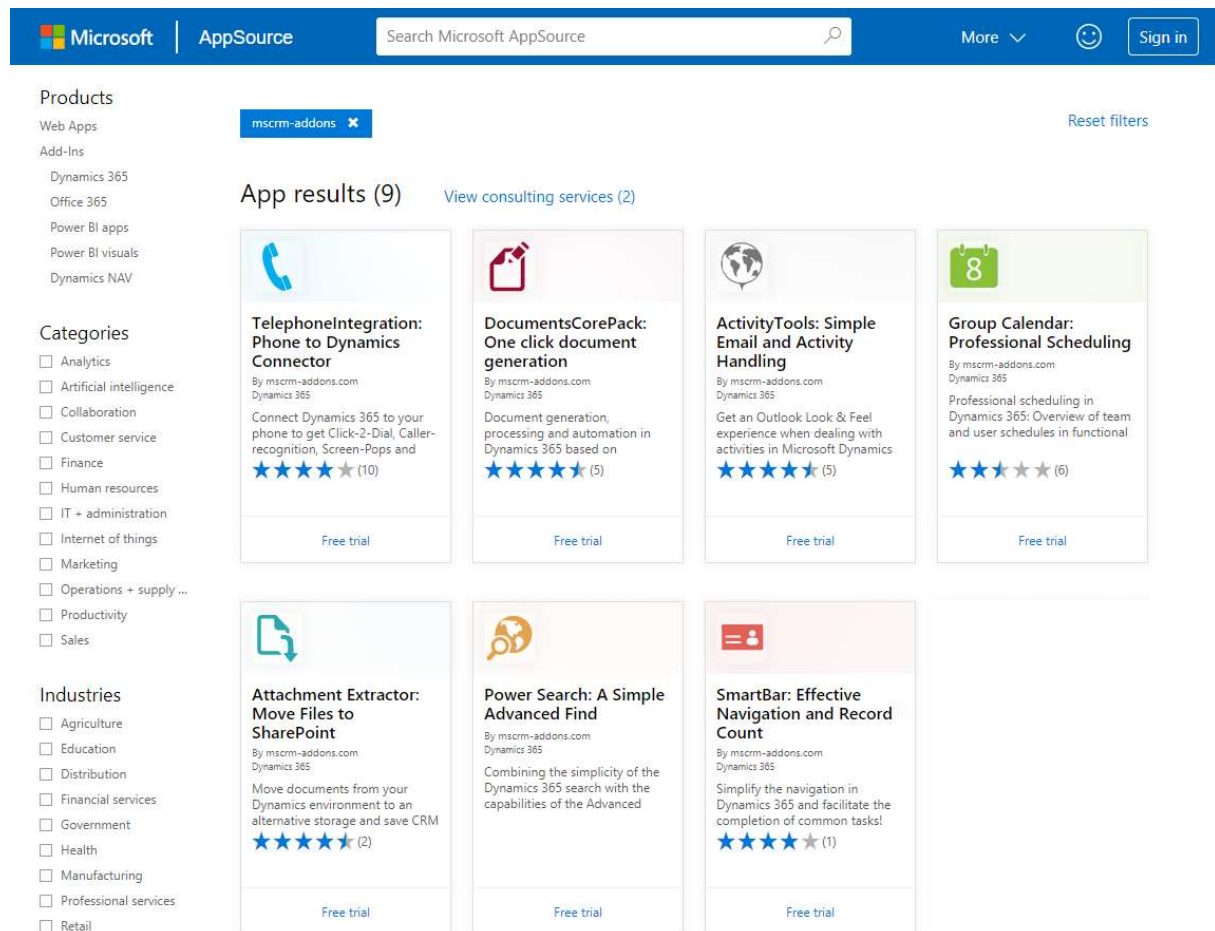


Figure 2: AppSource – solutions by mscrm-addons.com

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.

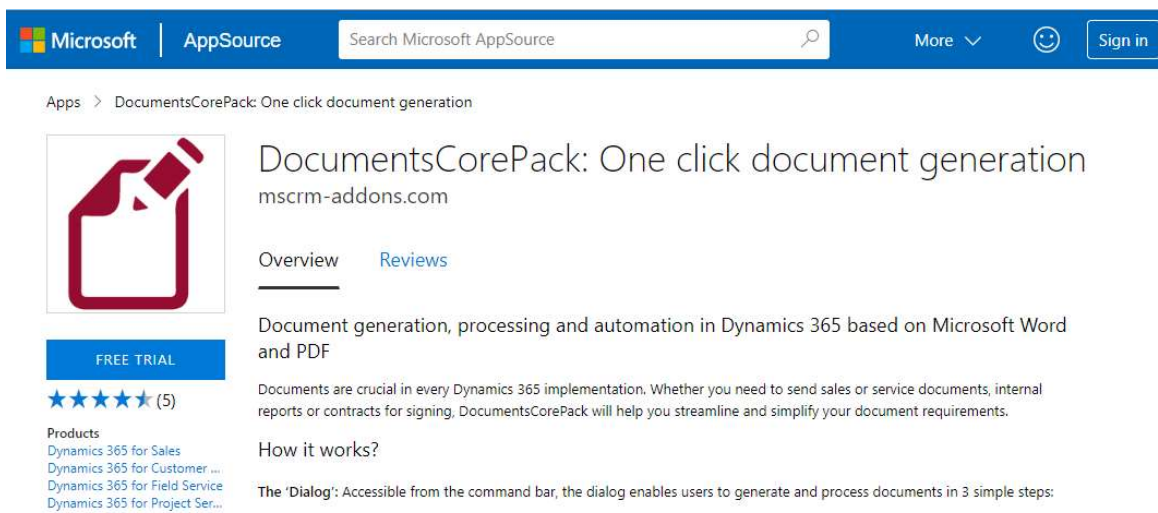


Figure 3: AppSource – DocumentsCorePack

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.

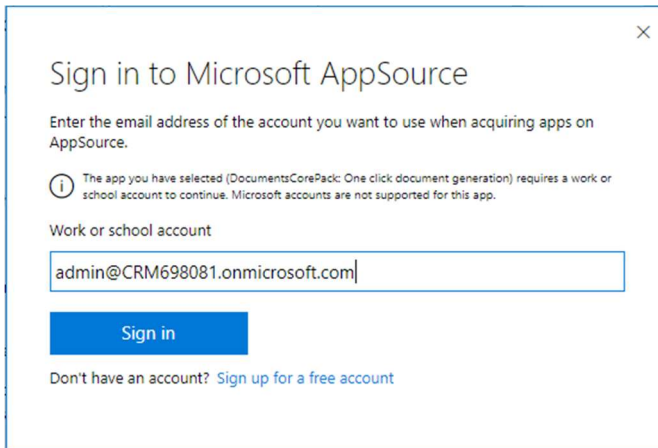


Figure 4: Sign in to Microsoft AppSource

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.

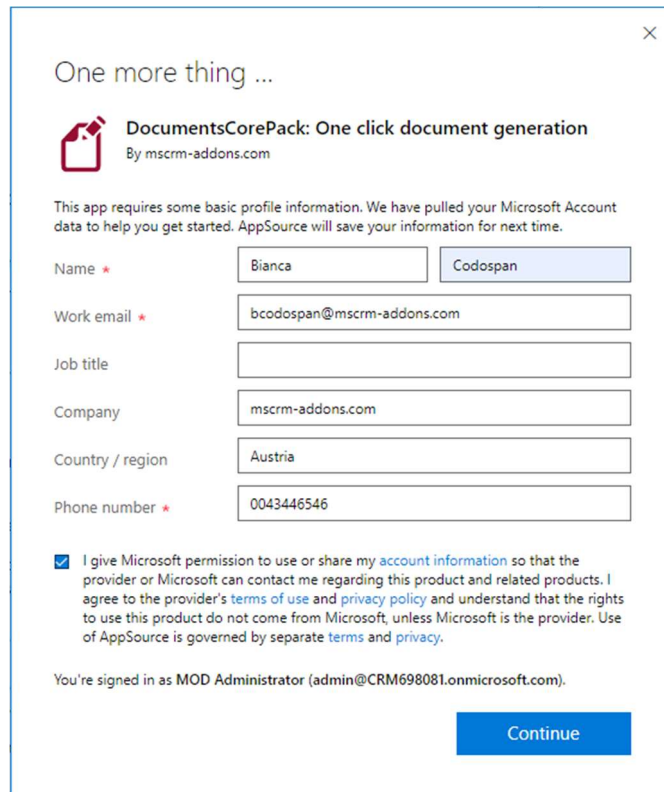


Figure 5: Enter your basic profile information

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

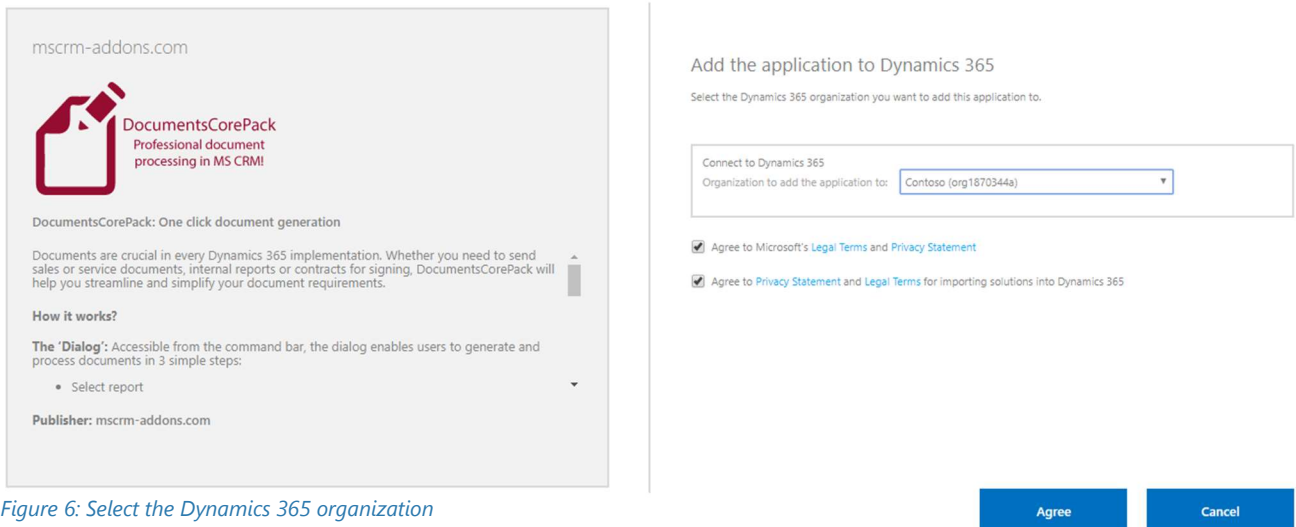
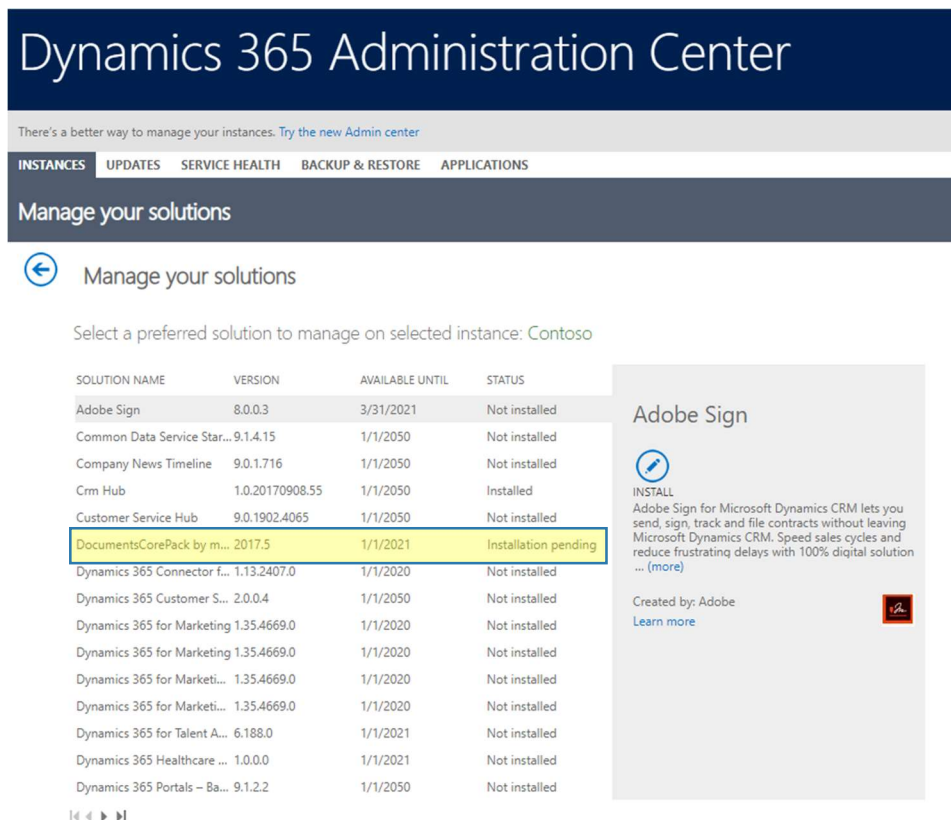


Figure 6: Select the Dynamics 365 organization

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).

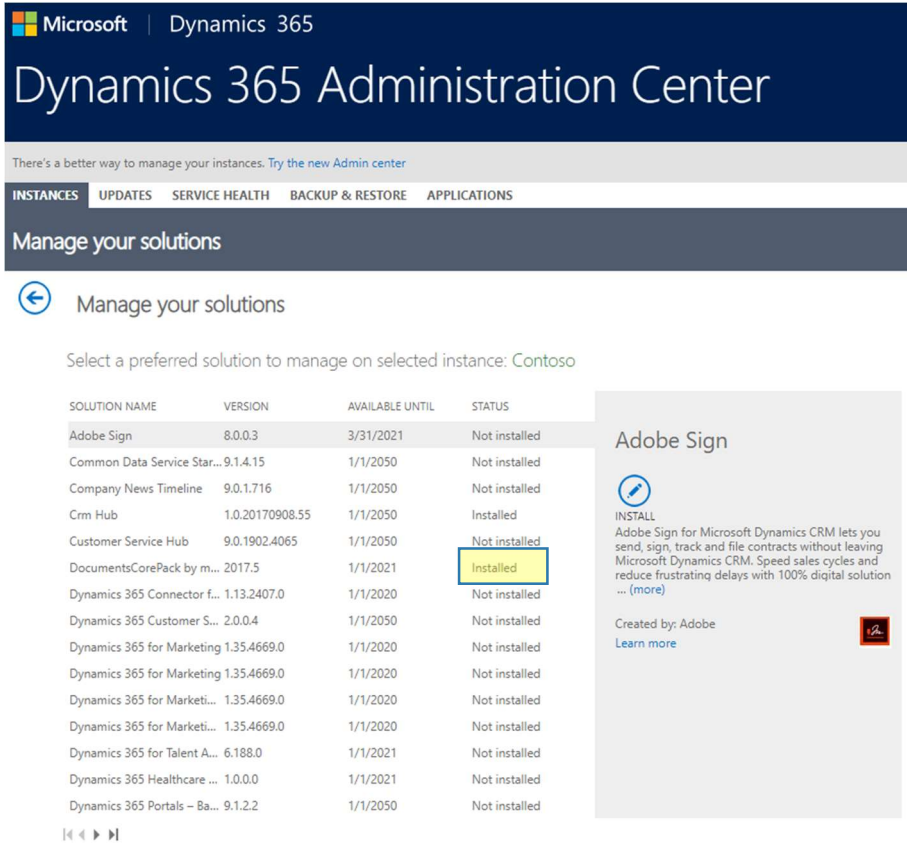


| SOLUTION NAME                | VERSION         | AVAILABLE UNTIL | STATUS               |
|------------------------------|-----------------|-----------------|----------------------|
| Adobe Sign                   | 8.0.0.3         | 3/31/2021       | Not installed        |
| Common Data Service Star...  | 9.1.4.15        | 1/1/2050        | Not installed        |
| Company News Timeline        | 9.0.1.716       | 1/1/2050        | Not installed        |
| Crm Hub                      | 1.0.20170908.55 | 1/1/2050        | Installed            |
| Customer Service Hub         | 9.0.1902.4065   | 1/1/2050        | Not installed        |
| DocumentsCorePack by m...    | 2017.5          | 1/1/2021        | Installation pending |
| Dynamics 365 Connector f...  | 1.13.2407.0     | 1/1/2020        | Not installed        |
| Dynamics 365 Customer S...   | 2.0.0.4         | 1/1/2050        | Not installed        |
| Dynamics 365 for Marketing   | 1.35.4669.0     | 1/1/2020        | Not installed        |
| Dynamics 365 for Marketing   | 1.35.4669.0     | 1/1/2020        | Not installed        |
| Dynamics 365 for Marketi...  | 1.35.4669.0     | 1/1/2020        | Not installed        |
| Dynamics 365 for Marketi...  | 1.35.4669.0     | 1/1/2020        | Not installed        |
| Dynamics 365 for Talent A... | 6.188.0         | 1/1/2021        | Not installed        |
| Dynamics 365 Healthcare ...  | 1.0.0.0         | 1/1/2021        | Not installed        |
| Dynamics 365 Portals – Ba... | 9.1.2.2         | 1/1/2050        | Not installed        |

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).



Microsoft | Dynamics 365

## Dynamics 365 Administration Center

There's a better way to manage your instances. Try the new Admin center

INSTANCES | **UPDATES** | SERVICE HEALTH | BACKUP & RESTORE | APPLICATIONS

### Manage your solutions

Select a preferred solution to manage on selected instance: Contoso

| SOLUTION NAME                | VERSION         | AVAILABLE UNTIL | STATUS        |
|------------------------------|-----------------|-----------------|---------------|
| Adobe Sign                   | 8.0.0.3         | 3/31/2021       | Not installed |
| Common Data Service Star...  | 9.1.4.15        | 1/1/2050        | Not installed |
| Company News Timeline        | 9.0.1.716       | 1/1/2050        | Not installed |
| Crm Hub                      | 1.0.20170908.55 | 1/1/2050        | Installed     |
| Customer Service Hub         | 9.0.1902.4065   | 1/1/2050        | Not installed |
| DocumentsCorePack by m...    | 2017.5          | 1/1/2021        | Installed     |
| Dynamics 365 Connector f...  | 1.13.2407.0     | 1/1/2020        | Not installed |
| Dynamics 365 Customer S...   | 2.0.0.4         | 1/1/2050        | Not installed |
| Dynamics 365 for Marketing   | 1.35.4669.0     | 1/1/2020        | Not installed |
| Dynamics 365 for Marketing   | 1.35.4669.0     | 1/1/2020        | Not installed |
| Dynamics 365 for Marketi...  | 1.35.4669.0     | 1/1/2020        | Not installed |
| Dynamics 365 for Marketi...  | 1.35.4669.0     | 1/1/2020        | Not installed |
| Dynamics 365 for Talent A... | 6.188.0         | 1/1/2021        | Not installed |
| Dynamics 365 Healthcare ...  | 1.0.0.0         | 1/1/2021        | Not installed |
| Dynamics 365 Portals – Ba... | 9.1.2.2         | 1/1/2050        | Not installed |

Adobe Sign

INSTALL

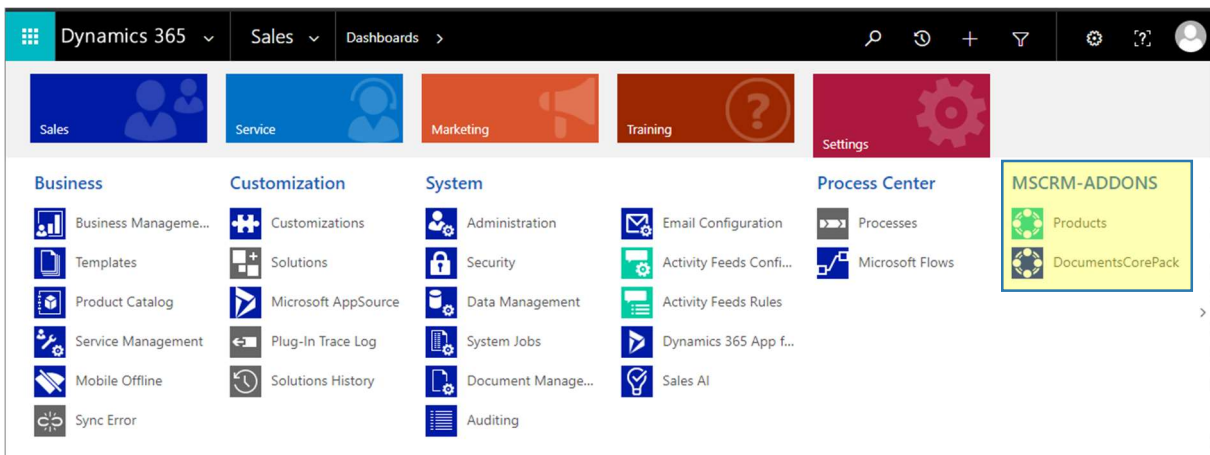
Adobe Sign for Microsoft Dynamics CRM lets you send, sign, track and file contracts without leaving Microsoft Dynamics CRM. Speed sales cycles and reduce frustrating delays with 100% digital solution ... (more)

Created by: Adobe

Learn more

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).



Dynamics 365 | Sales | Dashboards

Sales | Service | Marketing | Training | Settings

Business | Customization | System | Process Center

Business Management | Templates | Product Catalog | Service Management | Mobile Offline | Sync Error

Customizations | Solutions | Microsoft AppSource | Plug-In Trace Log | Solutions History

Administration | Security | Data Management | System Jobs | Document Manage... | Auditing

Email Configuration | Activity Feeds Confi... | Activity Feeds Rules | Dynamics 365 App f... | Sales AI

Processes | Microsoft Flows

MSCRM-ADDONS

Products

DocumentsCorePack

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.

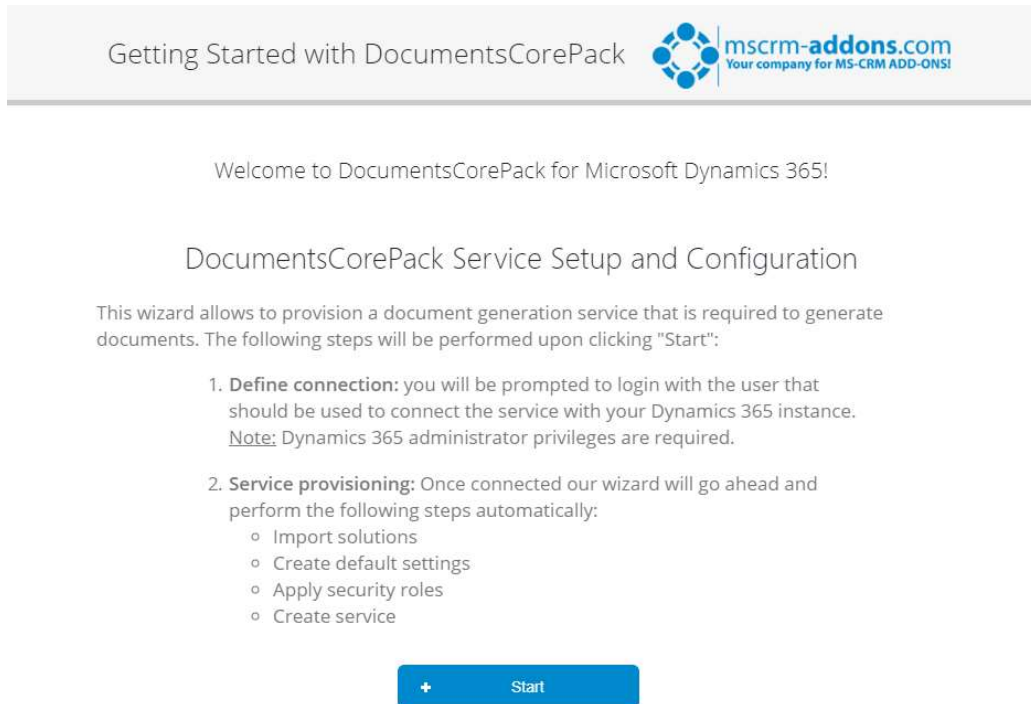


Figure 10: DocumentsCorePack Getting Started page

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!

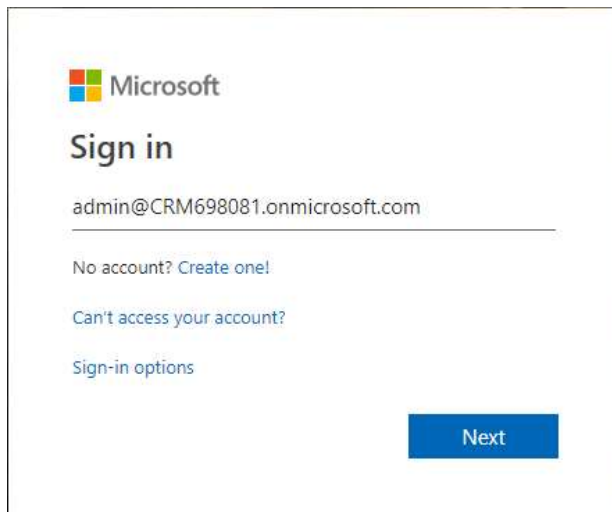


Figure 11: Login with administrator account

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.

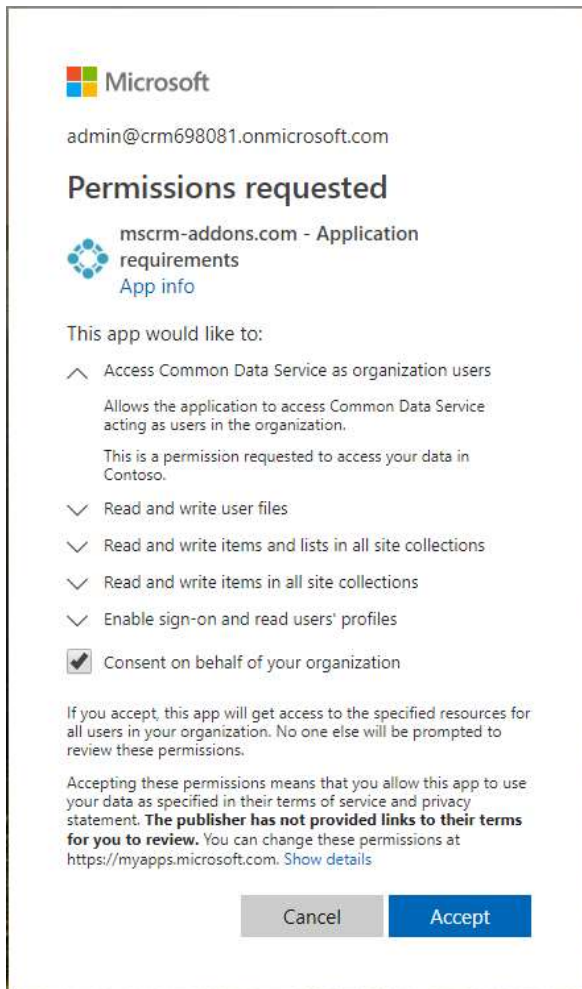


Figure 12: Accept requested permissions

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

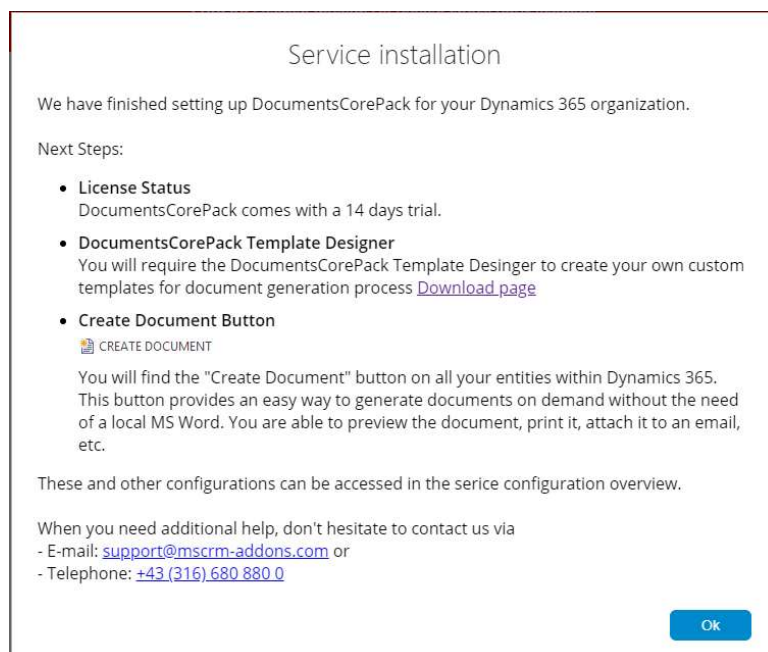



Figure 13: Service installation information

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

Getting Started with DocumentsCorePack

 mscrm-addons.com  
Your company for MS-CRM ADD-ONS!

Welcome to DocumentsCorePack for Microsoft Dynamics 365!

## DocumentsCorePack Service Setup and Configuration

Service Status: Running

Data transfered (month): 0 B

Instance: EU West Public 2

Stop

Classic view

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.

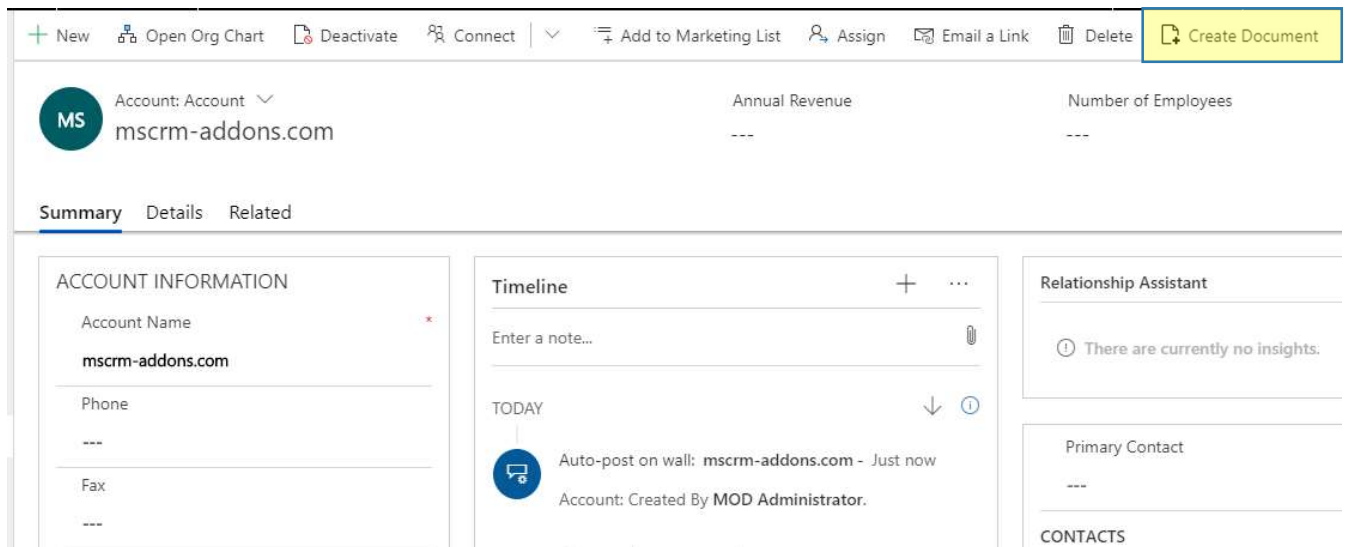


Figure 15: The Create Document functionality

- 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.

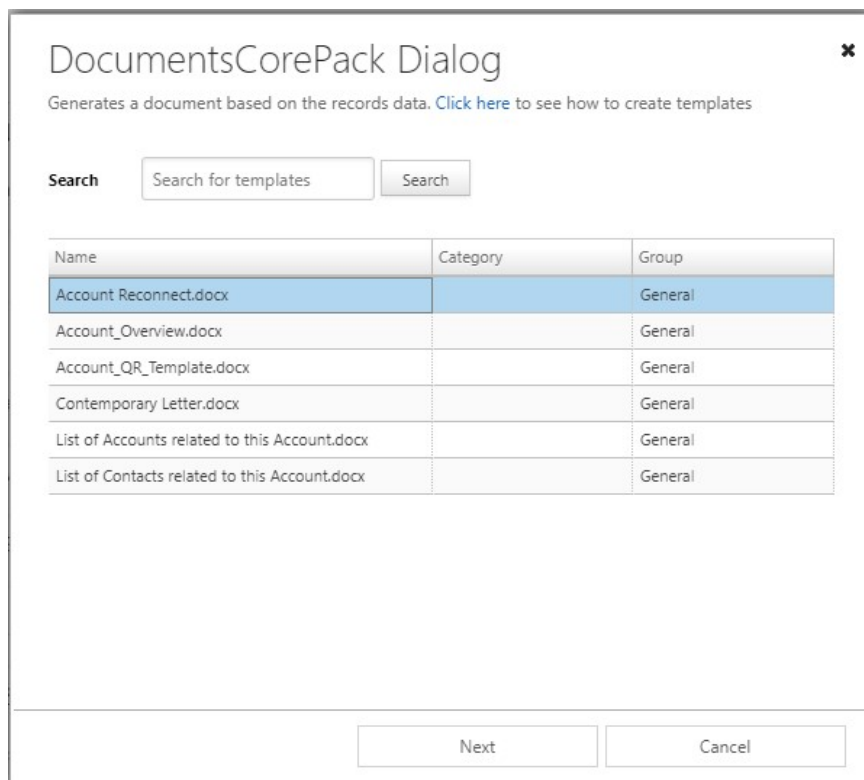
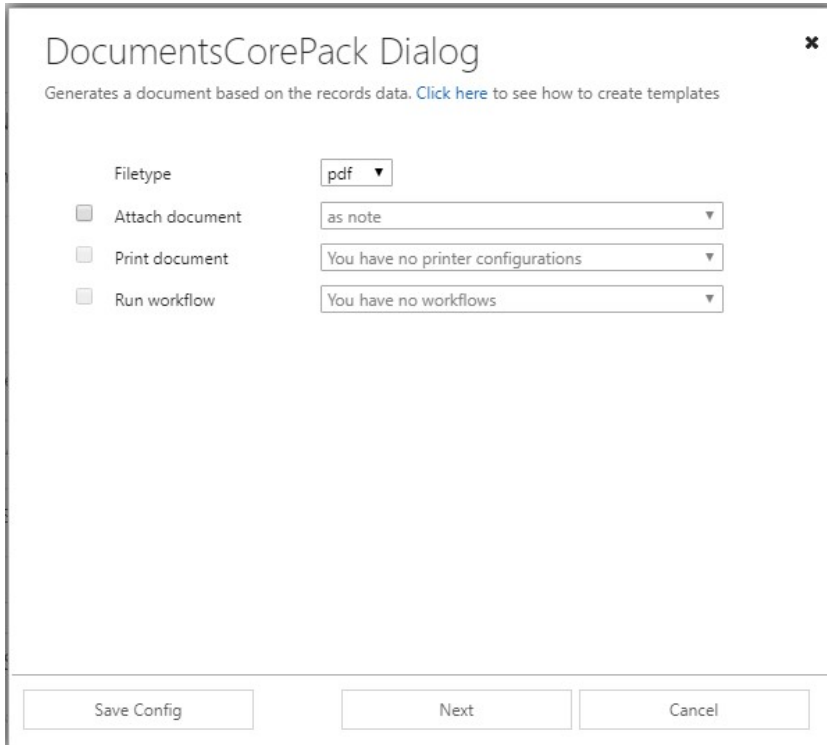


Figure 16: The DocumentsCorePack Dialog

- 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.



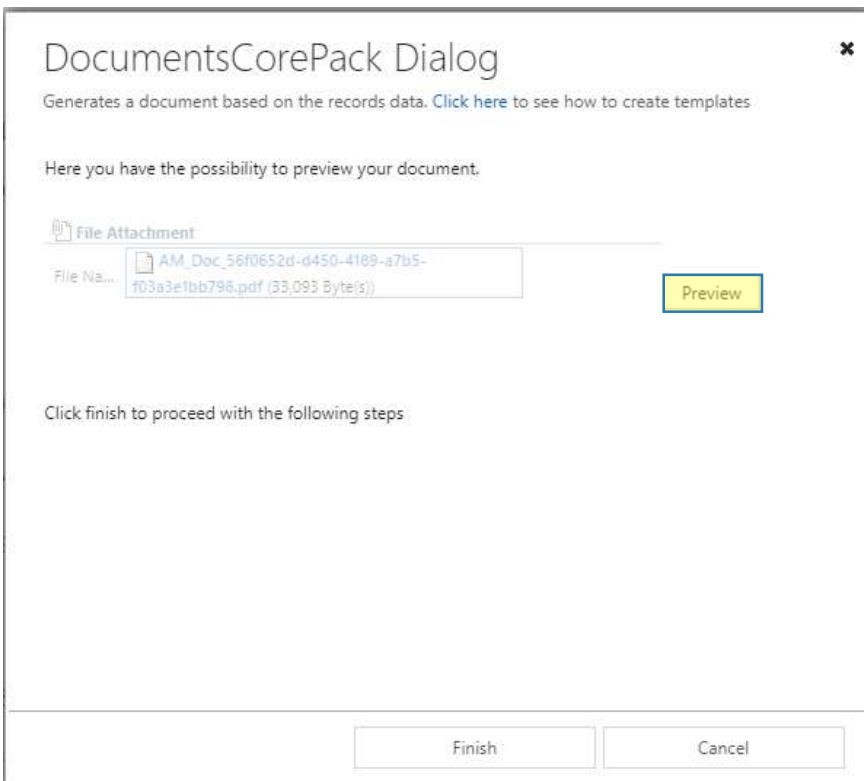
The screenshot shows the 'DocumentsCorePack Dialog' window. It has a title bar with a close button. Below the title is a subtitle: 'Generates a document based on the records data. [Click here](#) to see how to create templates'. The main area contains four options, each with a checkbox and a dropdown menu:

- ☐ Filetype: pdf
- ☐ Attach document: as note
- ☐ Print document: You have no printer configurations
- ☐ Run workflow: You have no workflows

At the bottom, there are three buttons: 'Save Config', 'Next', and 'Cancel'.

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.



The screenshot shows the 'DocumentsCorePack Dialog' window in the 'Preview document' step. It has a title bar with a close button. Below the title is a subtitle: 'Generates a document based on the records data. [Click here](#) to see how to create templates'. The main area contains the text: 'Here you have the possibility to preview your document.' Below this is a 'File Attachment' section with a file icon and a text box containing the file name: 'AM.Doc.56f0652d-d450-4189-a7b5-f03a3e1bb796.pdf (33,093 Byte(s))'. To the right of the text box is a yellow 'Preview' button. At the bottom, there are two buttons: 'Finish' and 'Cancel'.

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

,

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 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](http://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.

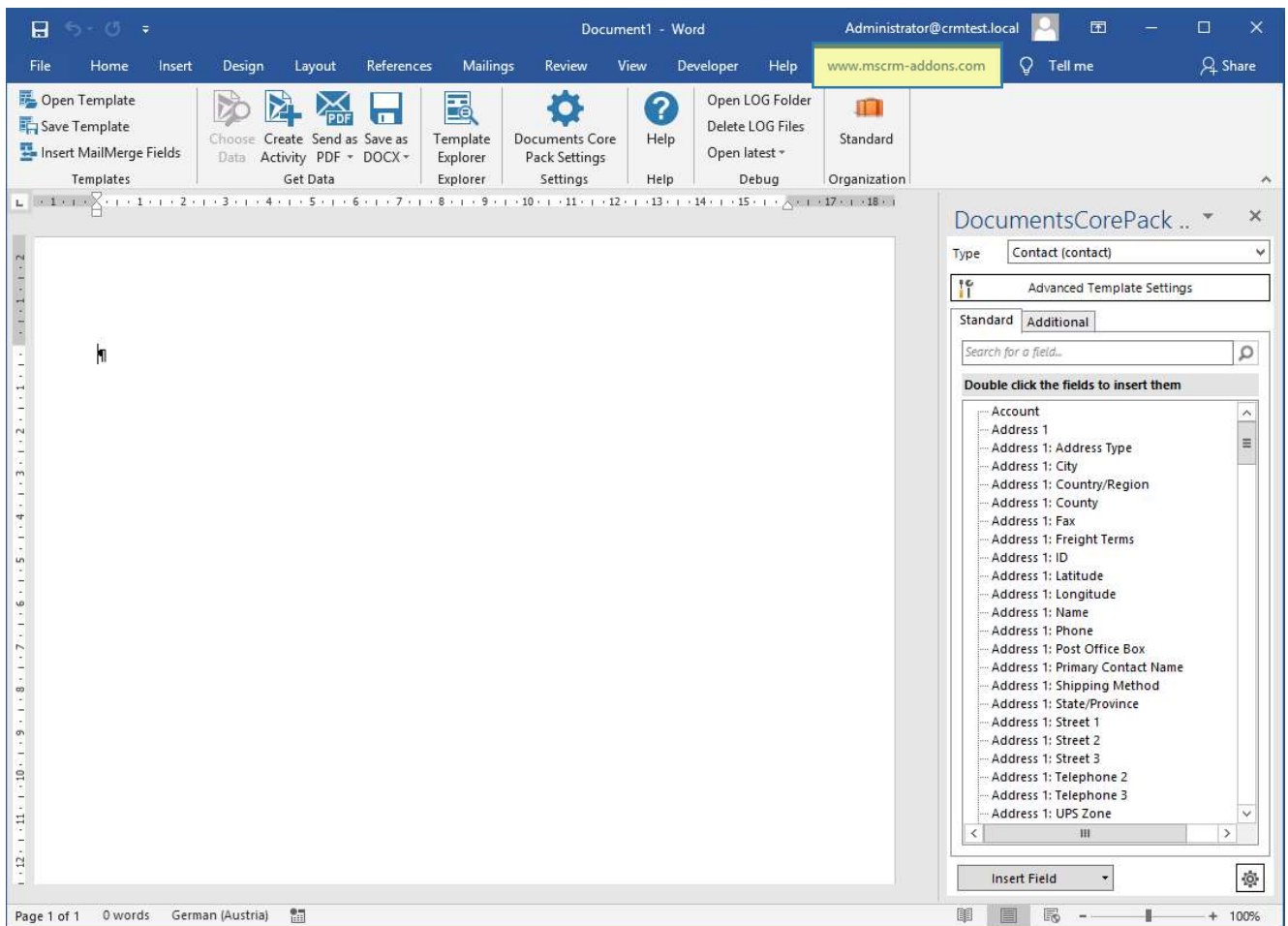


Figure 20: Microsoft Office Word with mscrm-addons ribbon

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.

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## Contact

For further technical questions, please visit our blog <http://blogs.mscrm-addons.com> or contact [support@mscrm-addons.com](mailto:support@mscrm-addons.com).

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