mscrm-addons.com
DocumentsCorePack
for Microsoft Dynamics CRM

DocumentsCorePack
Getting Started from Appsource

v.1.0, June 2021

Hello! Thank you for your interest in DocumentsCorePack. You can now use the Microsoft Power Platform admin center to install, configure, and manage Dynamics 365 apps such as all *mscrm-addons.com* products that run on Microsoft Dataverse. Follow the way to install DocumentsCorePack from Microsoft Power Platform admin center:

Getting Started from AppSource

Open the Microsoft AppSource and enter in the search field "*mscrm-addons.com*". All *mscrm-addons* products are shown.

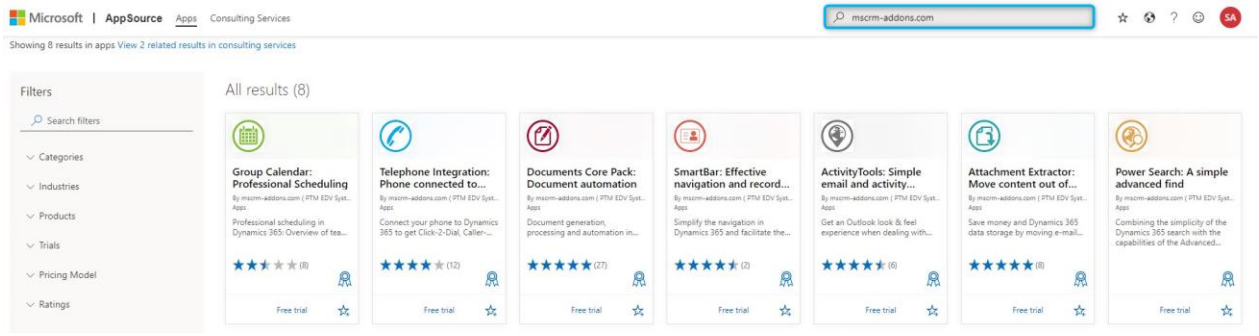


Figure 1: AppSource - mscrm-addons.com

Select "DocumentsCorePack: Document automation" and click on the "*Free trial*".

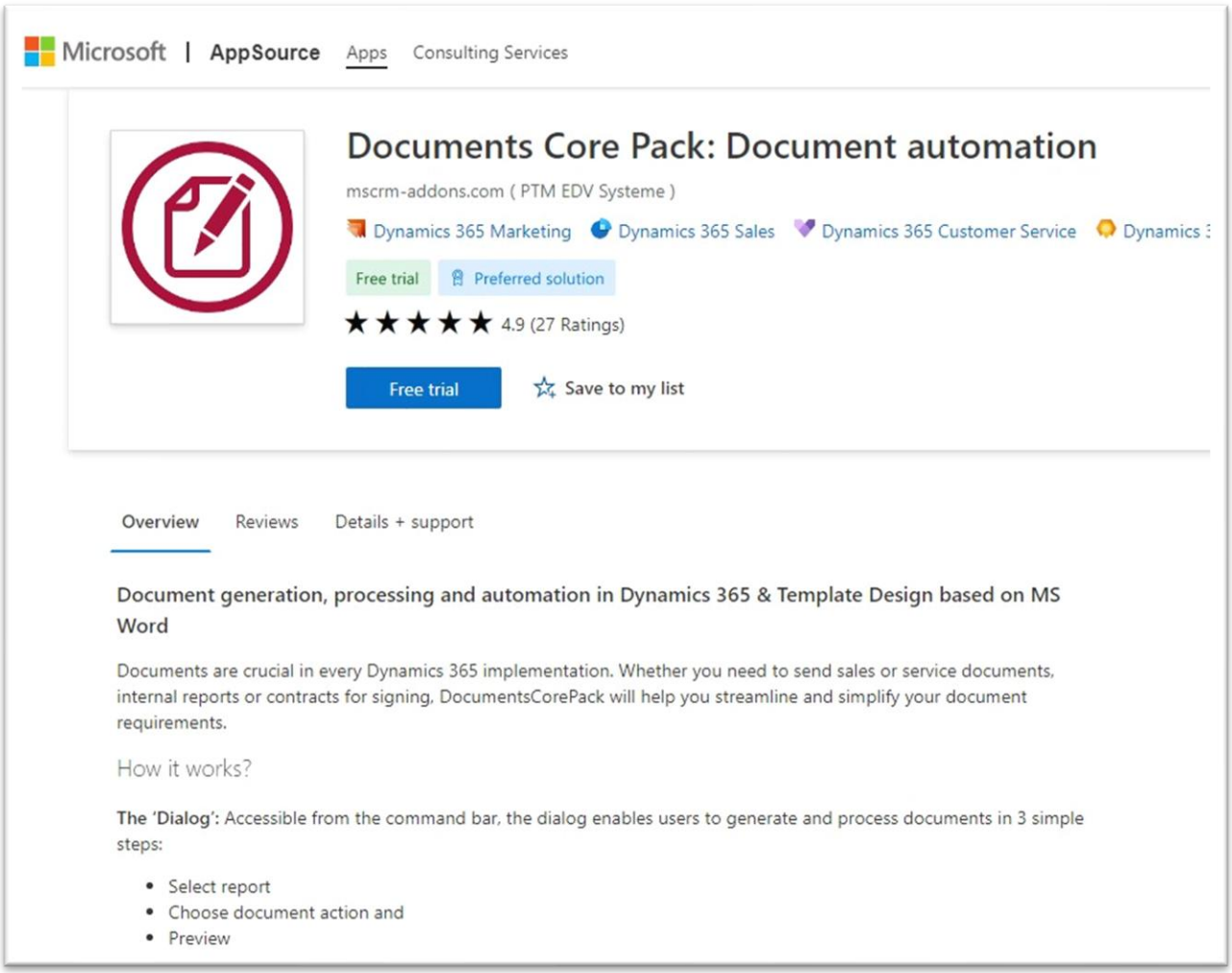


Figure 2: DCP-Free Trial

Give the permissions to terms of use and privacy policy by making a tick and press the ***[Continue]***-button.

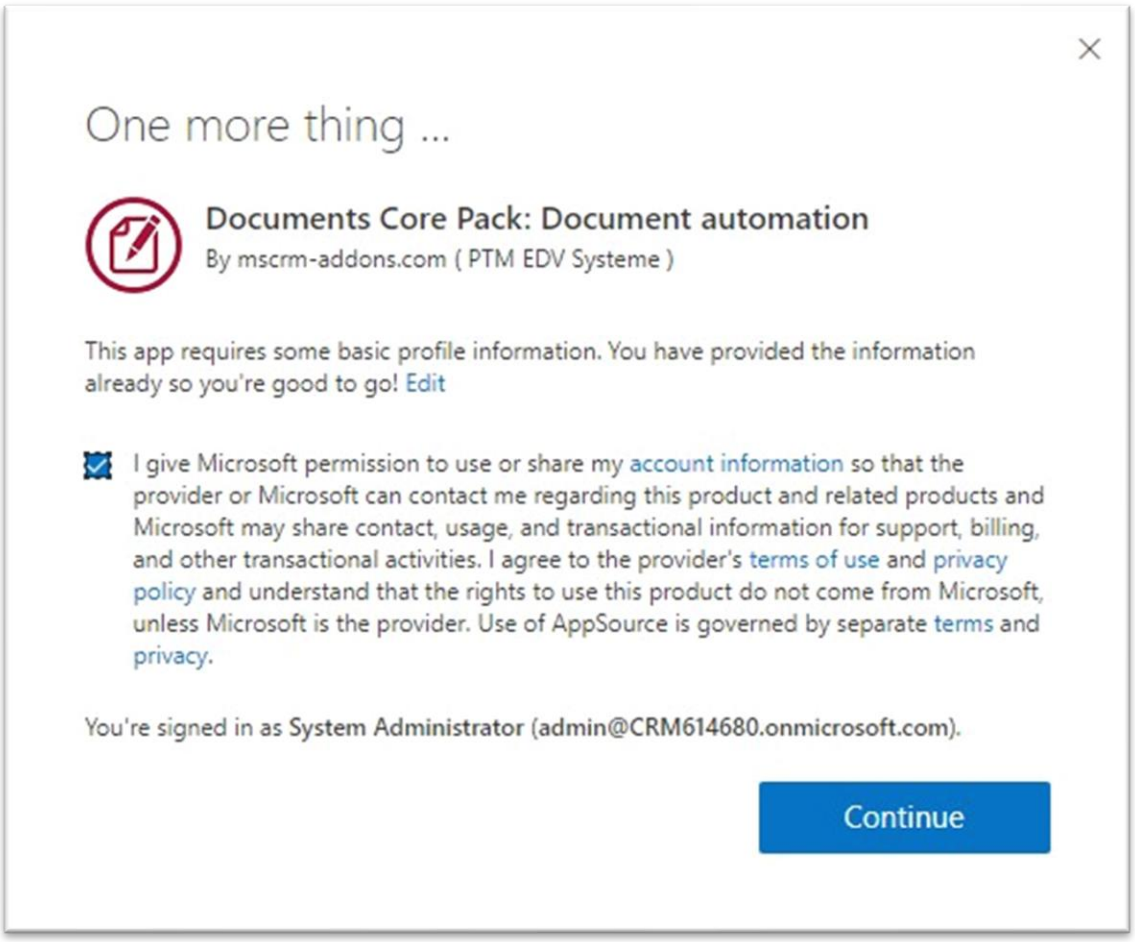


Figure 3: Terms of use and privacy policy

Another Legal Terms and Privacy Statement to agree with. Press the ***[Install]***-button.

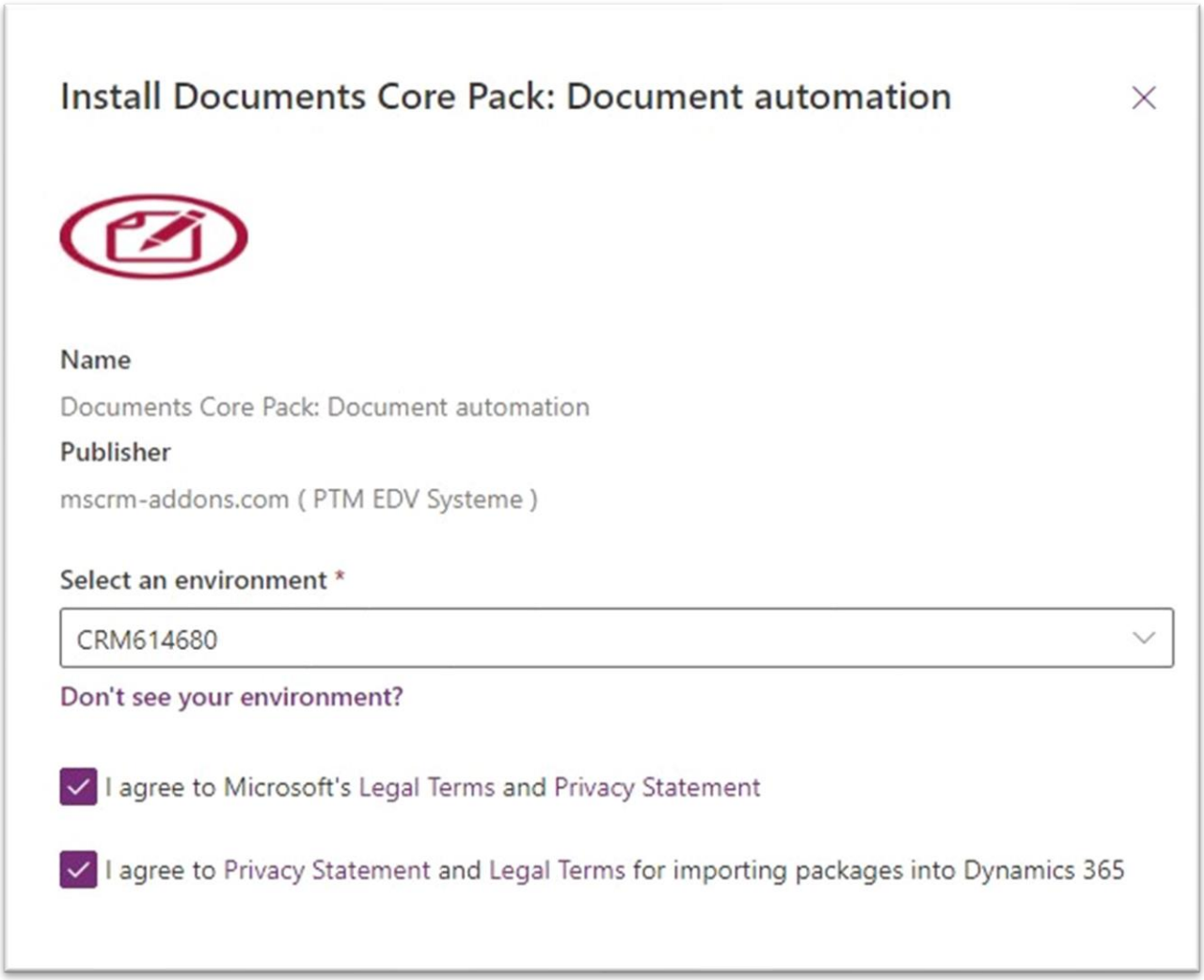


Figure 4: Legal terms privacy statement

You can see that the DocumentsCorePack is installing. This may take a while.

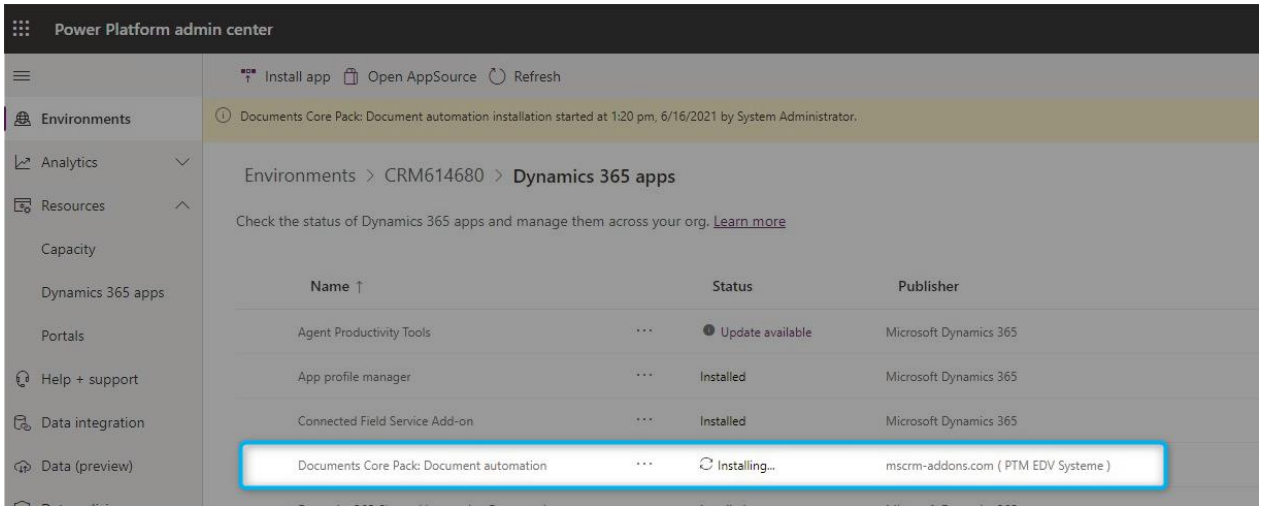


Figure 5: Installing DCP

When the installation is finished, you can see it in your Dynamics 365 apps.

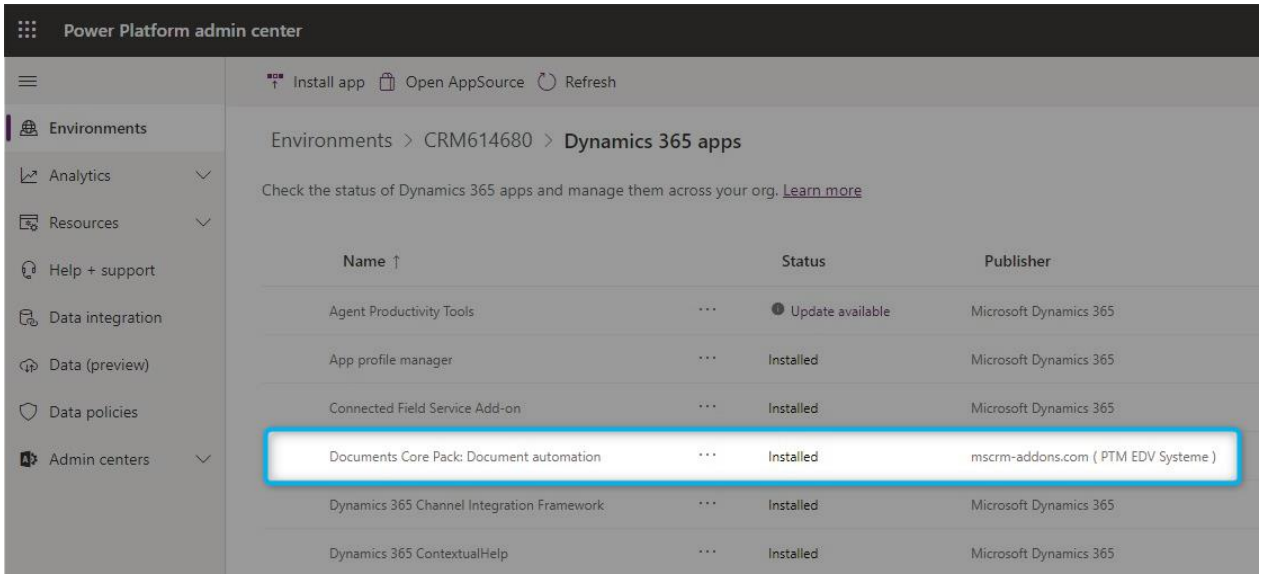


Figure 6: Finished installation

Have a look in your *Dynamics 365* > *Advanced Settings* and you can see the installed *DocumentsCorePack* in the *MSCRM-ADDONS* column.

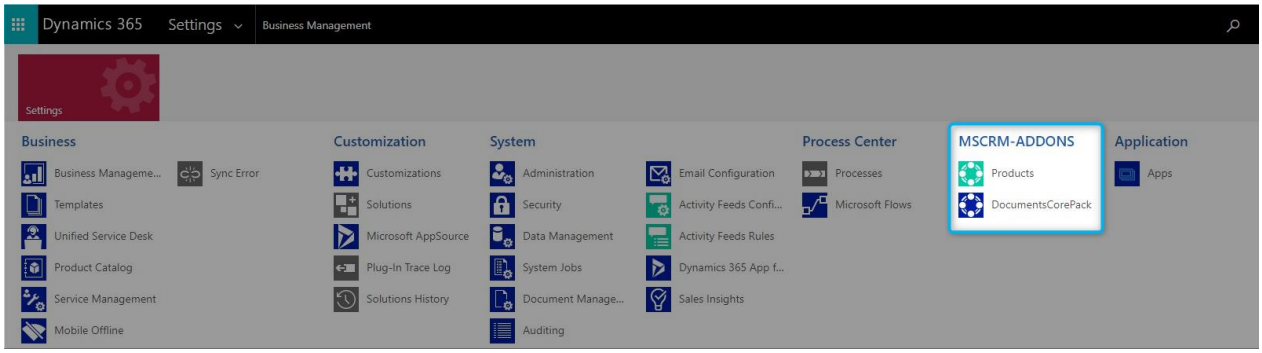


Figure 7: Installed DocumentsCorePack in Dynamics 365

A click on DocumentsCorePack leads you to the DocumentsCorePack Getting Started page. Hit the ***[Configure Service]***-button to proceed.

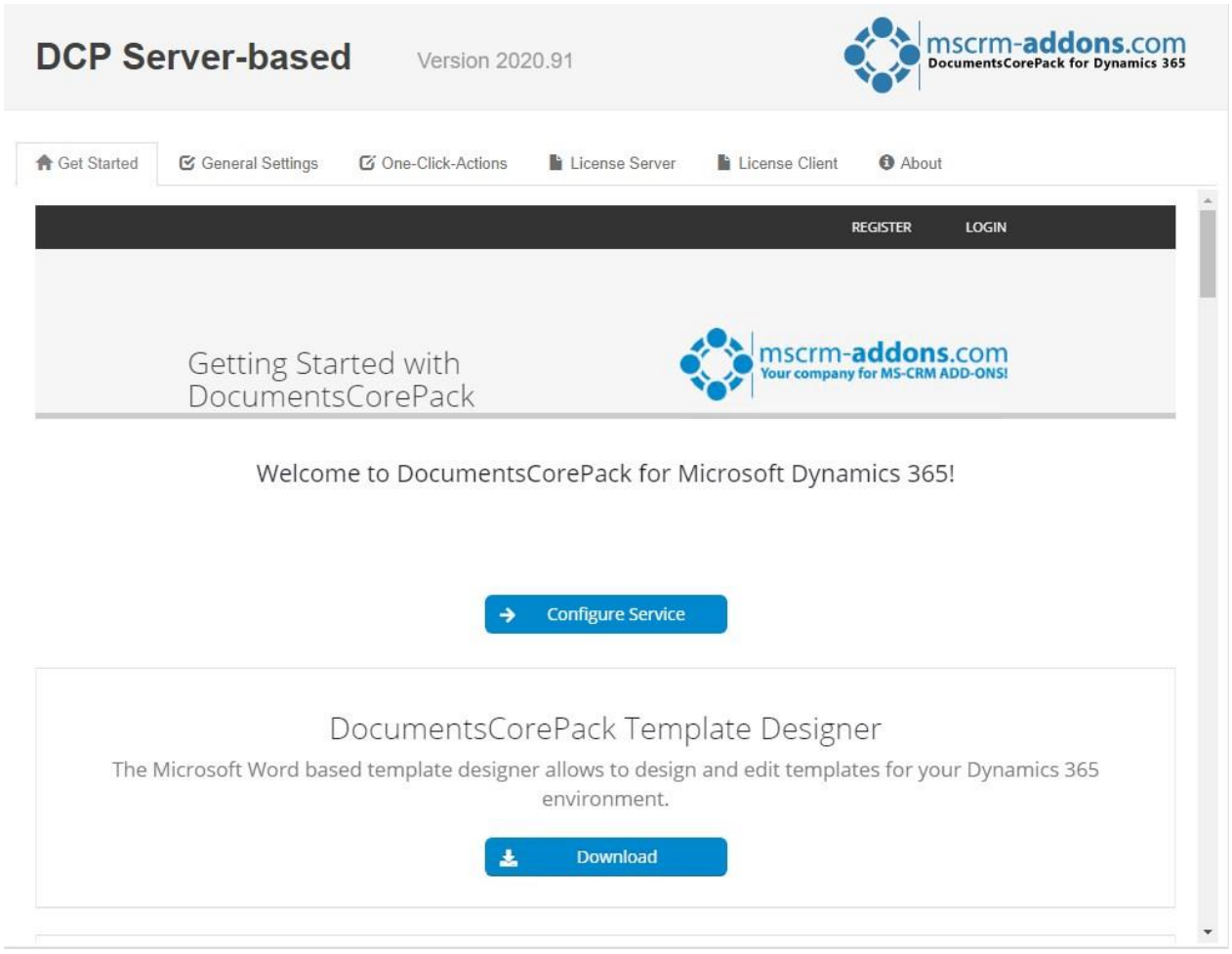


Figure 8: Getting Started Page of DocumentsCorePack

To configure the document generation service, you have to log in with an existing mscrm-addons.com user account.

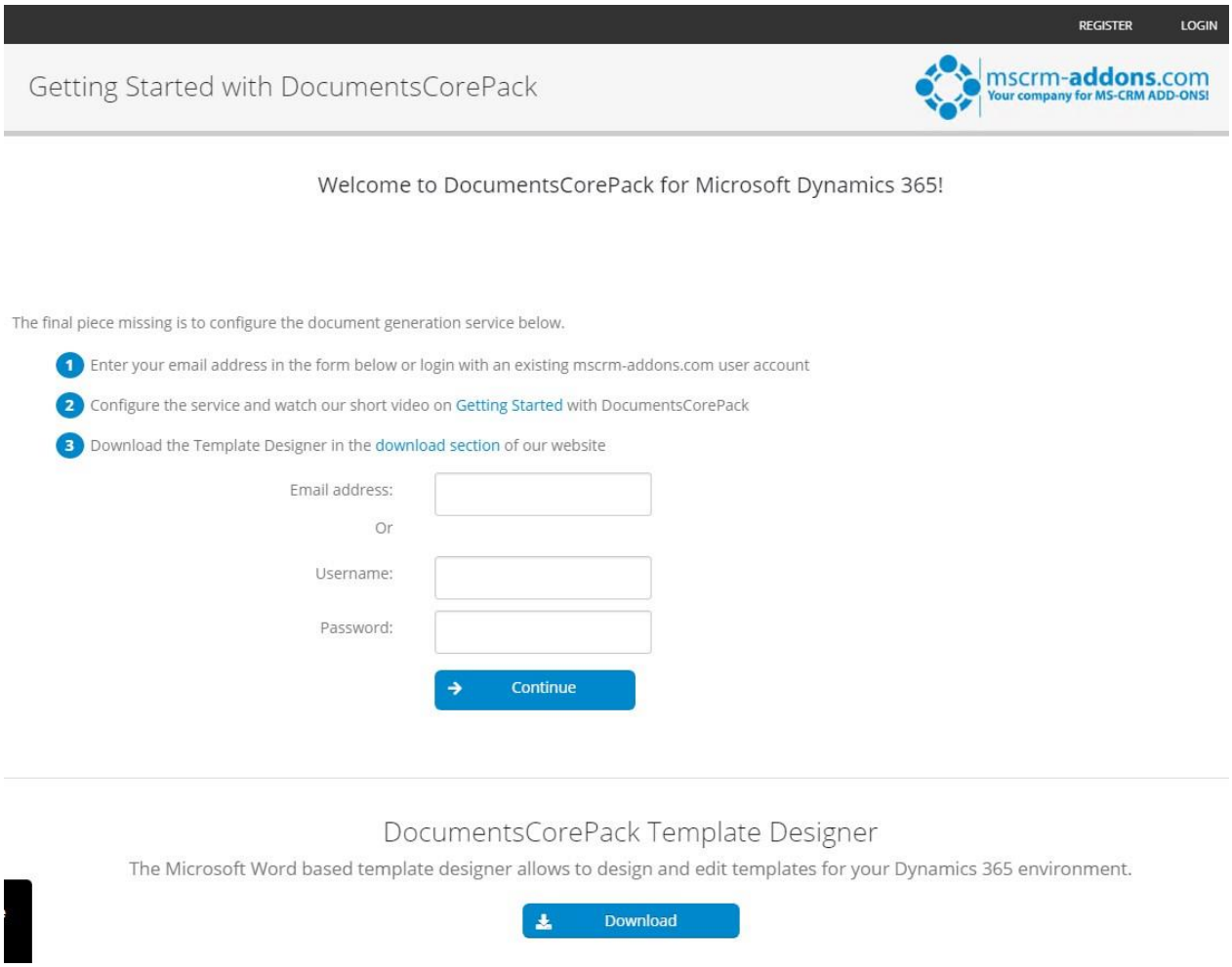


Figure 9: Log-in with mscrm-addons.com account

After your login, this site is shown. Press the ***[Start]***-button.

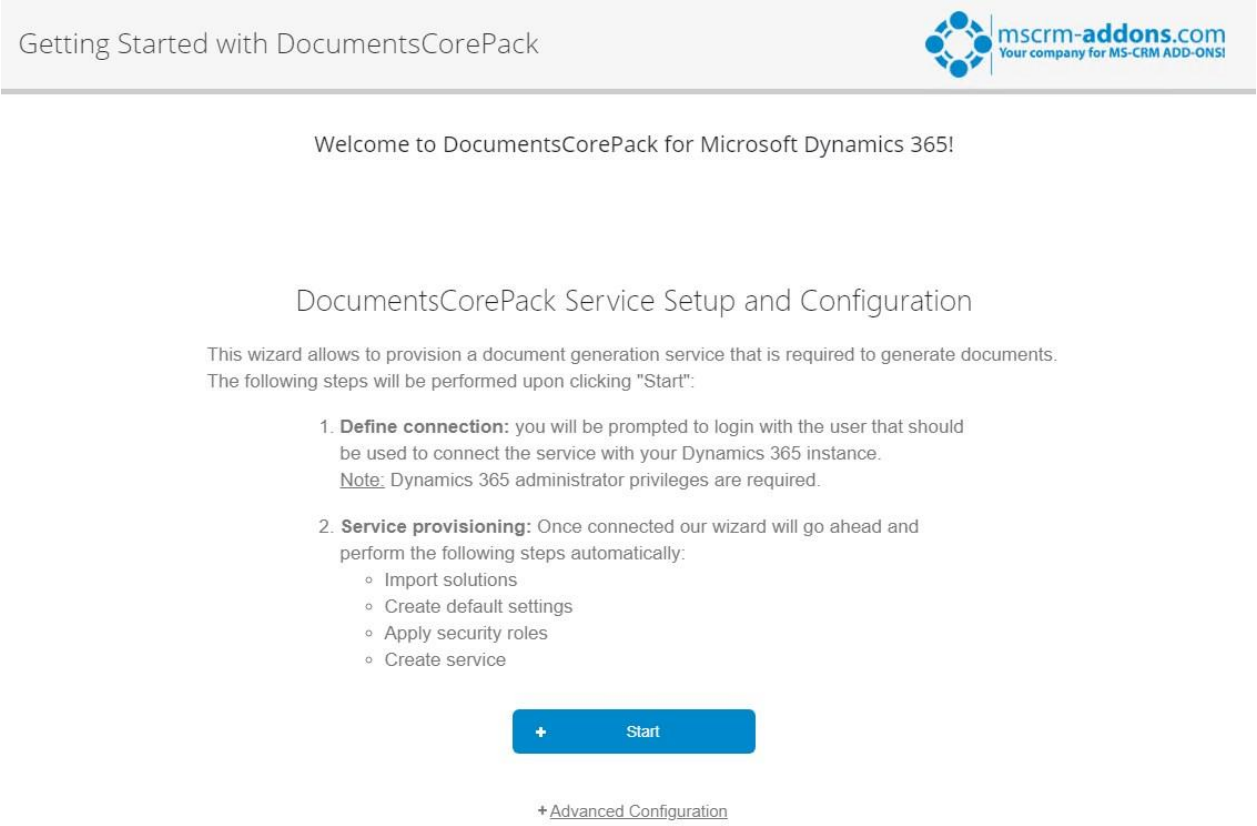


Figure 10: Getting started with DocumentsCorePack

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!

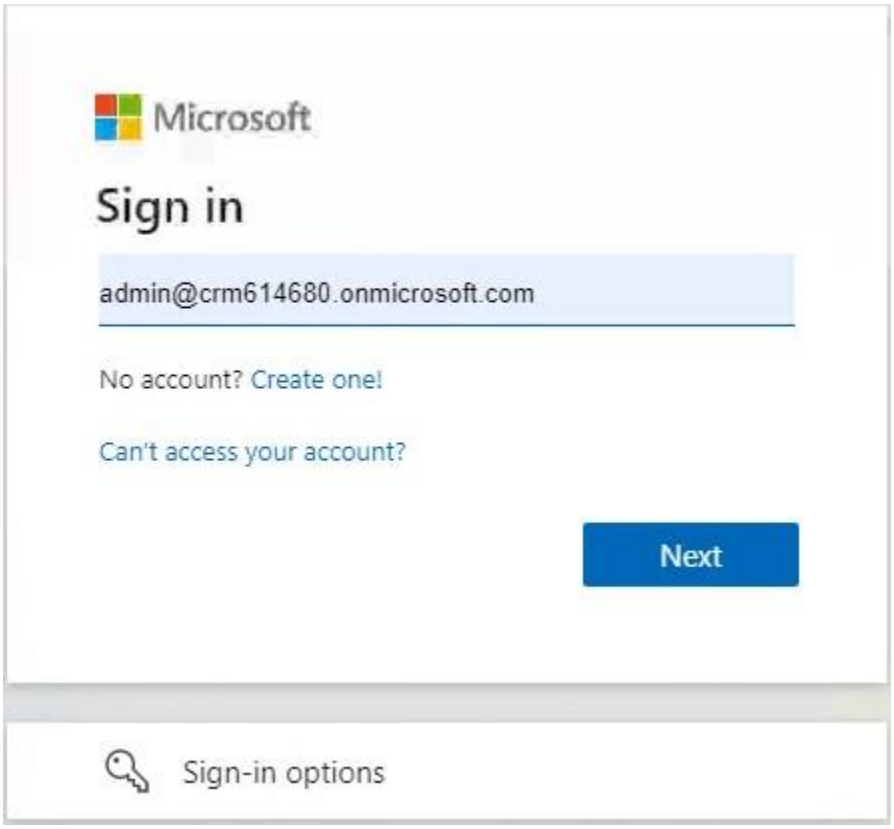


Figure 11: MS Sign in

The service installation starts!

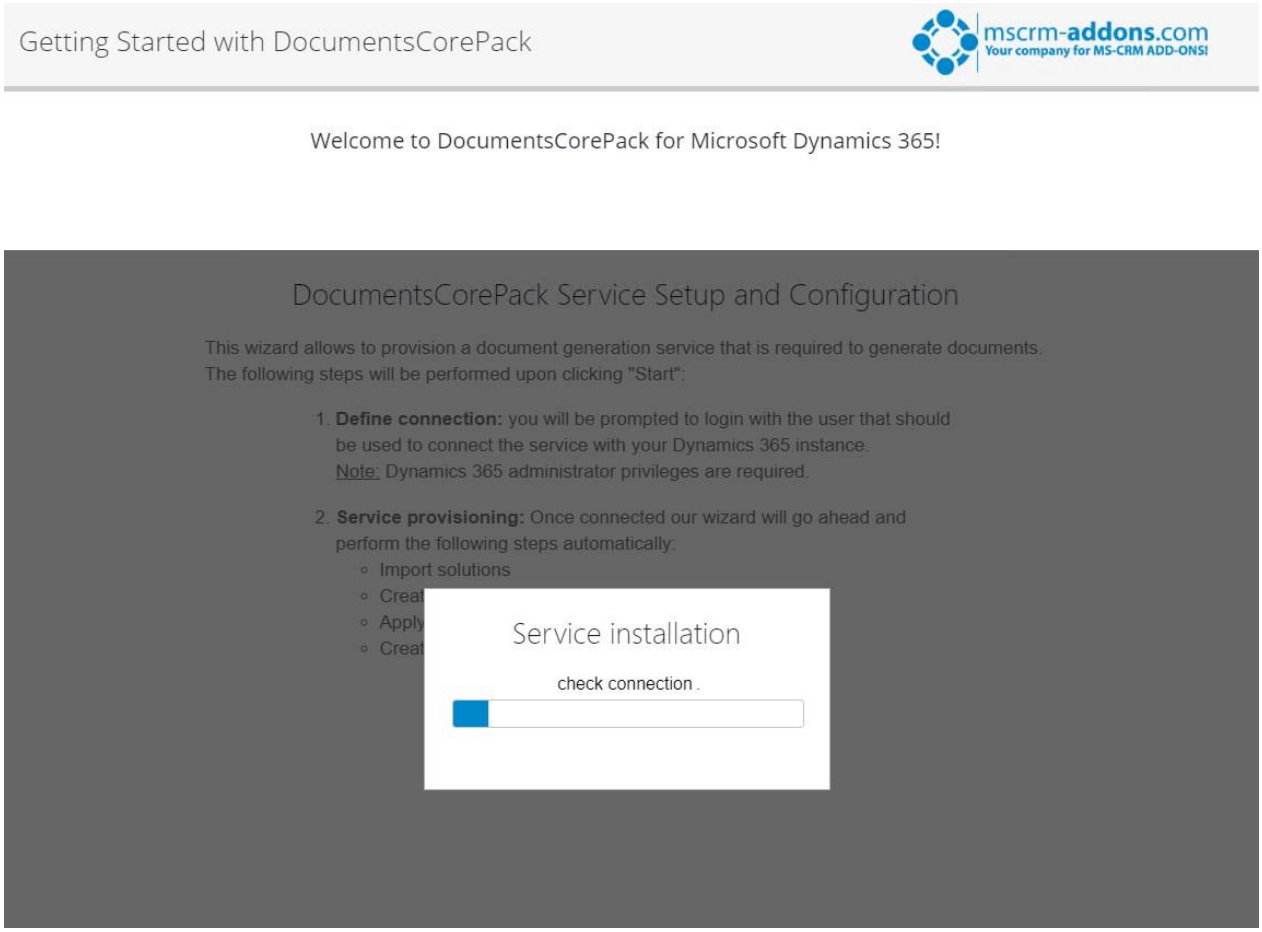


Figure 12: Service installation

The window below pops up with information on the next steps. This means that you have finished the installation successfully. Hit the ***[OK]***-button to continue.

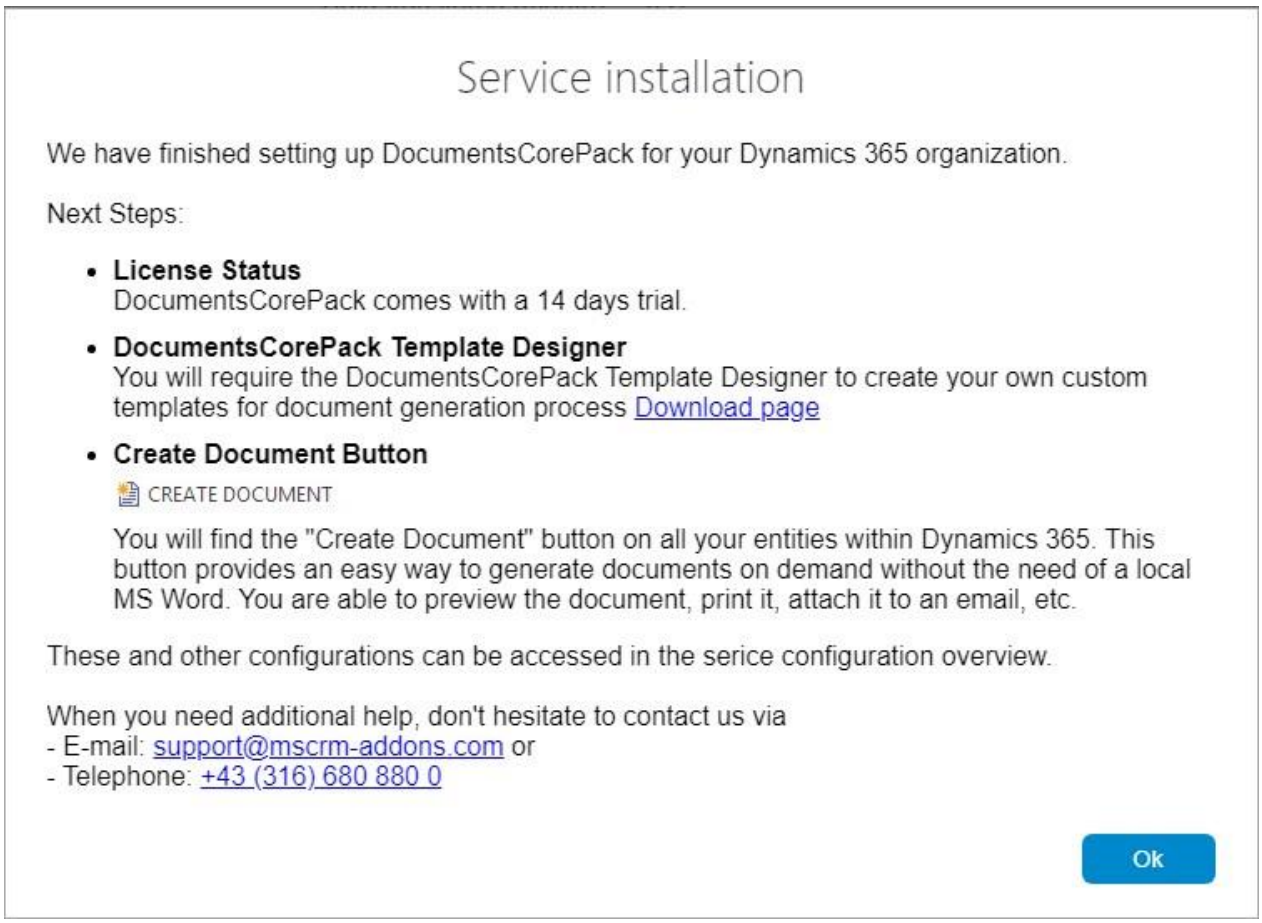


Figure 13: Service installation info

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.

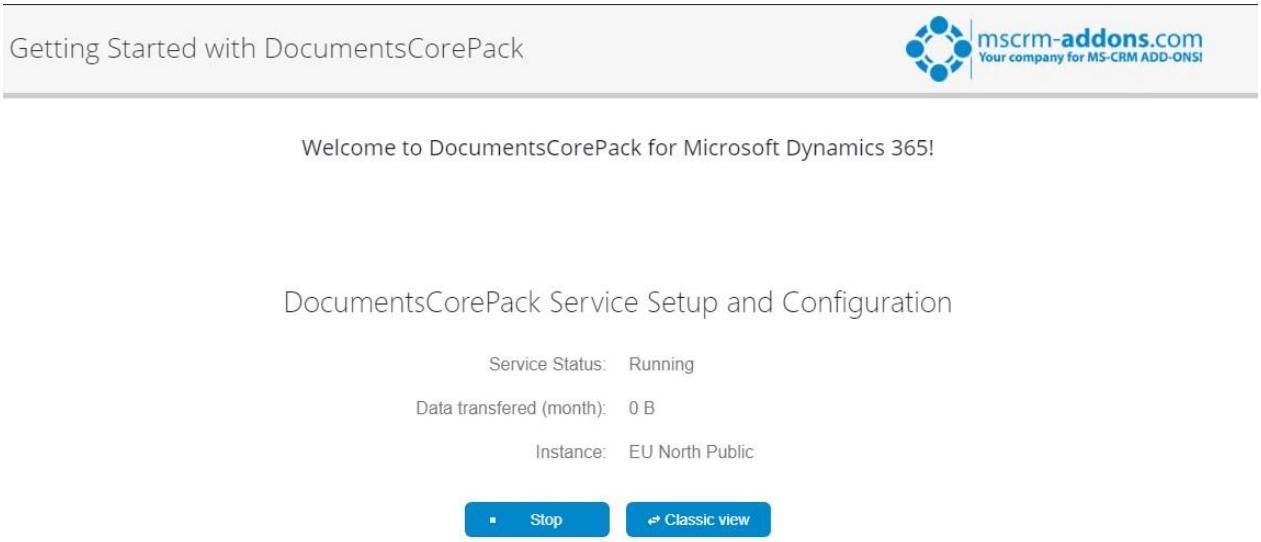


Figure 14: Completed installation

1 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.

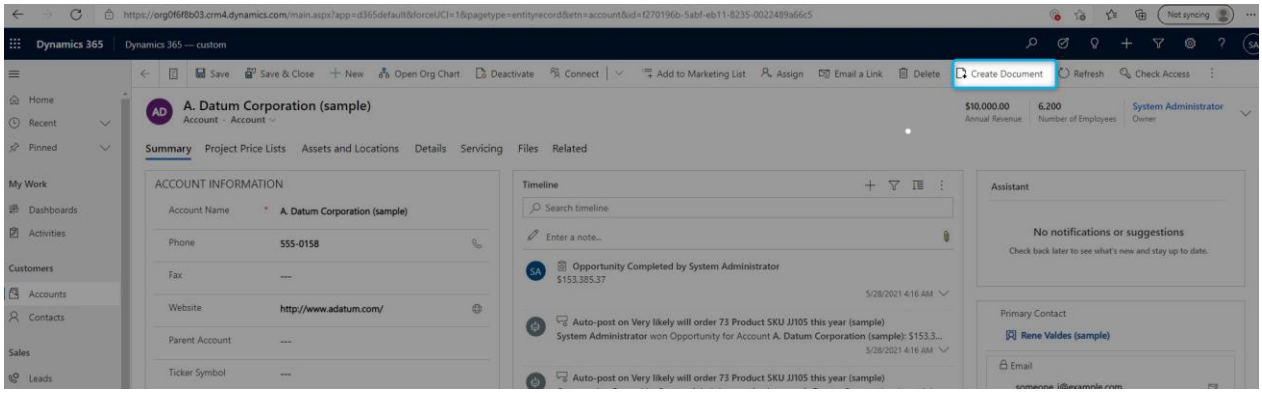


Figure 15: The Create Document functionality

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.

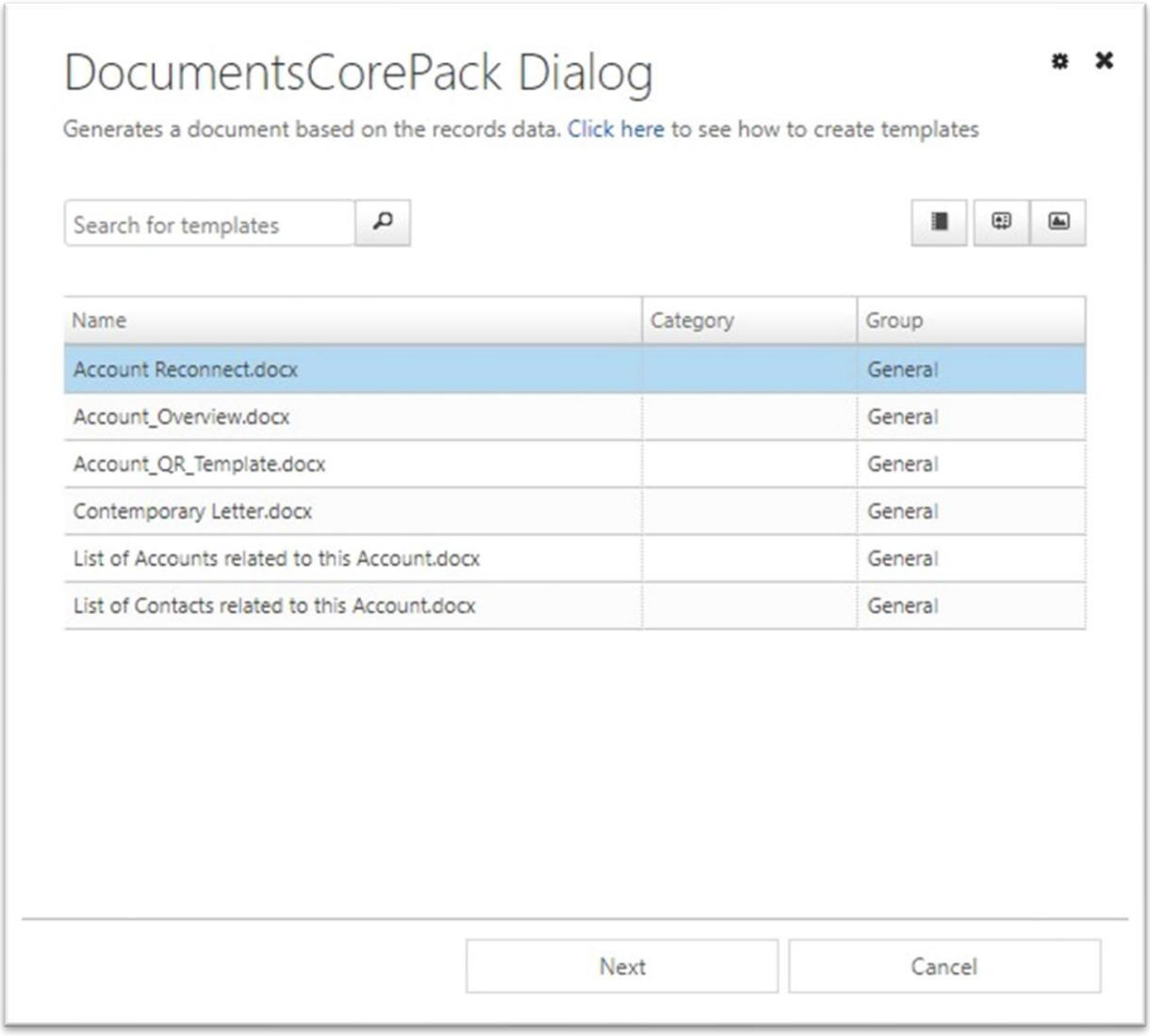


Figure 16: The DocumentsCorePack Dialog

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.

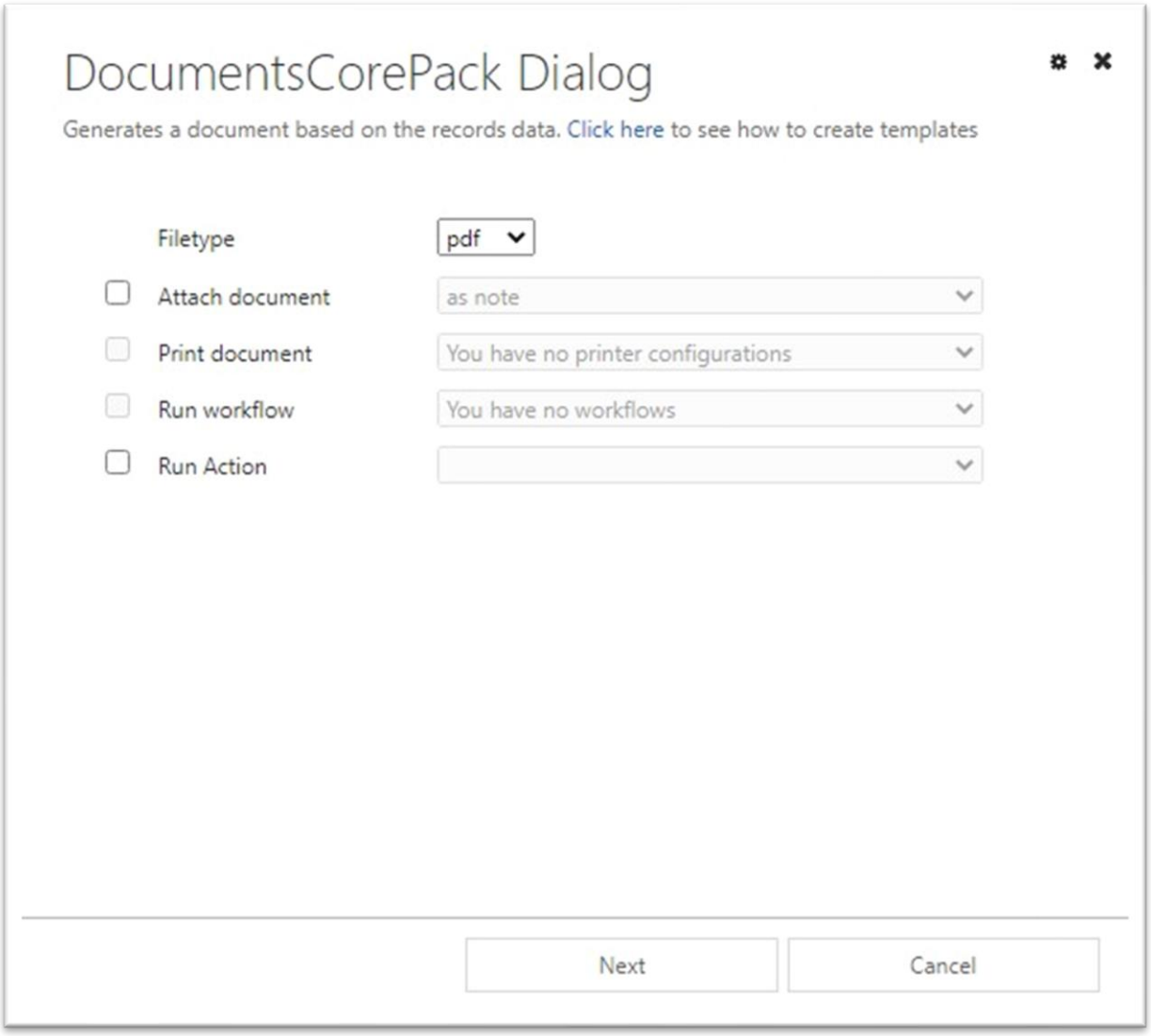


Figure 17: Document generation

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

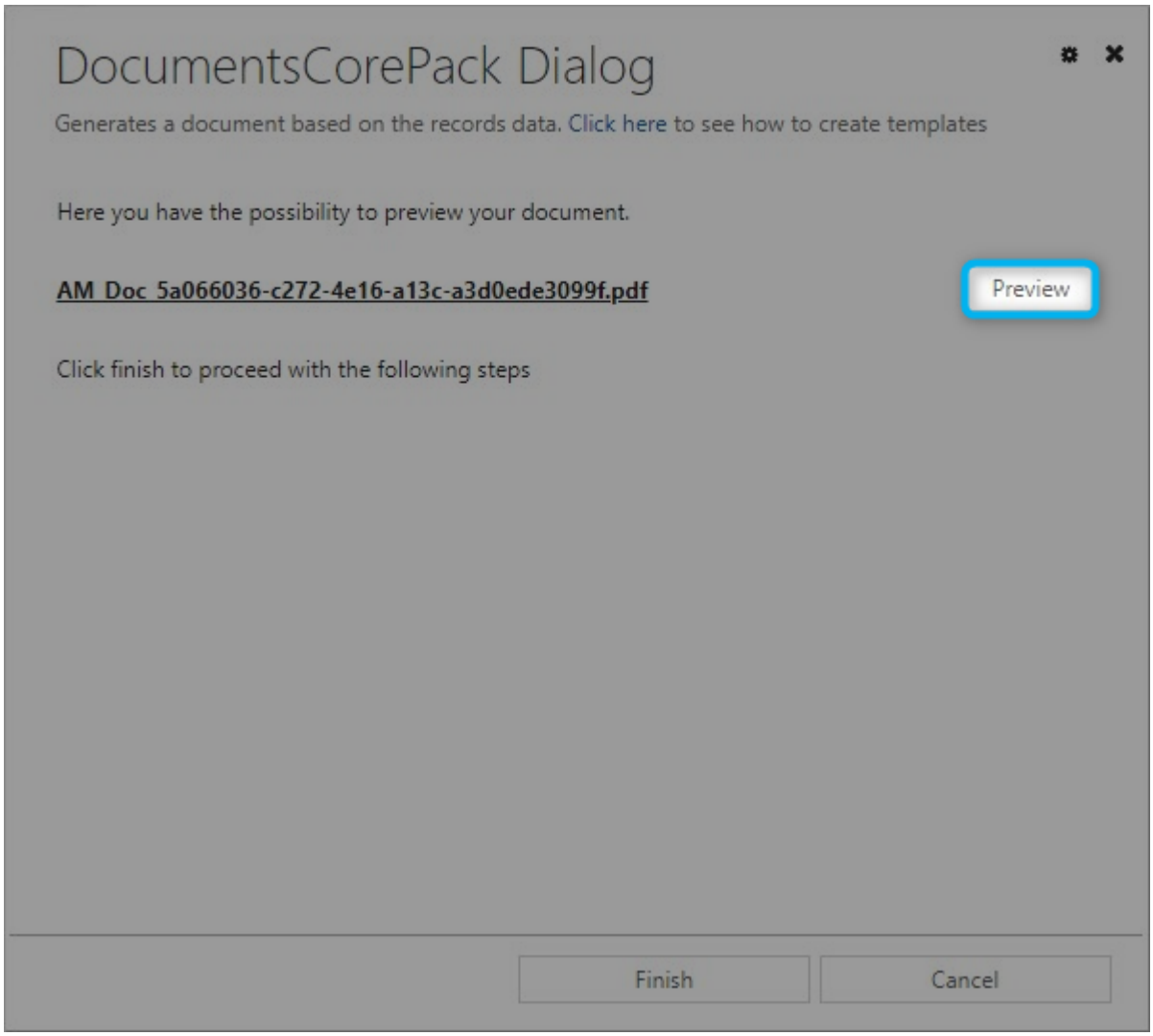
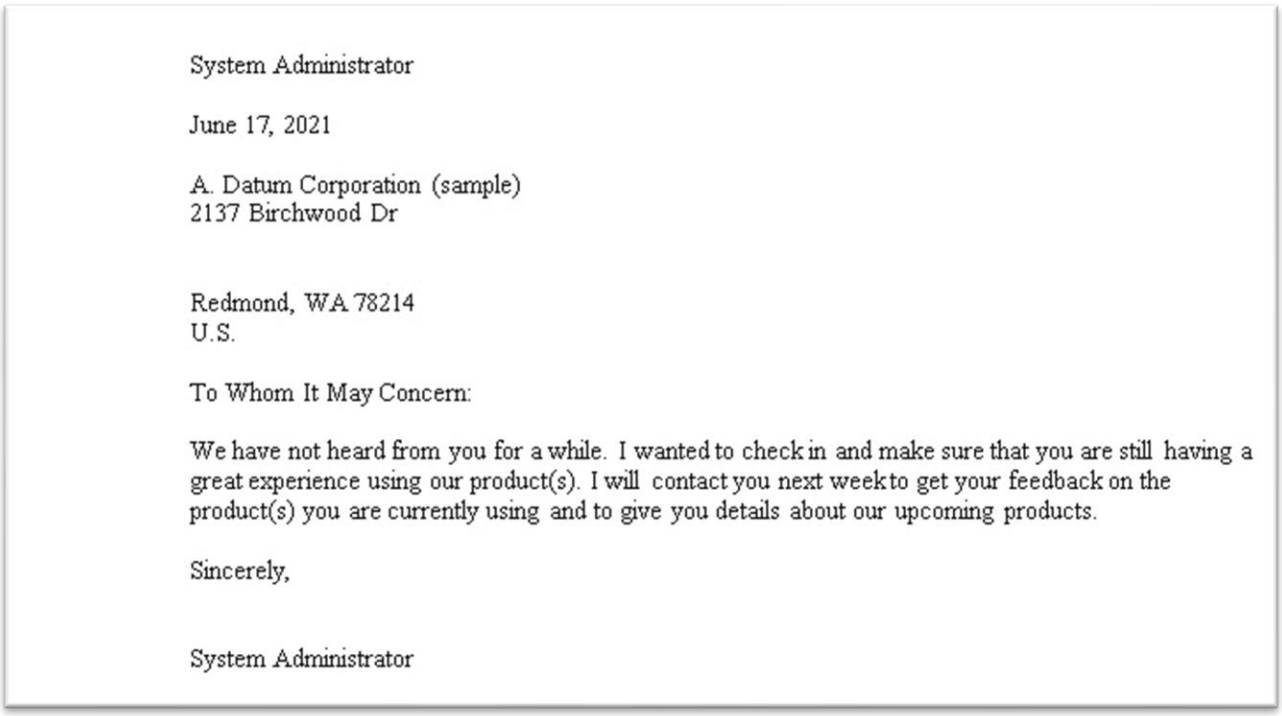


Figure 18: DCP- preview

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



System Administrator

June 17, 2021

A. Datum Corporation (sample)
2137 Birchwood Dr

Redmond, WA 78214
U.S.

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,

System Administrator

Figure 19: : PDF of Account Reconnect template

2 Create your own template

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 *DocumentsCorePack 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 template.

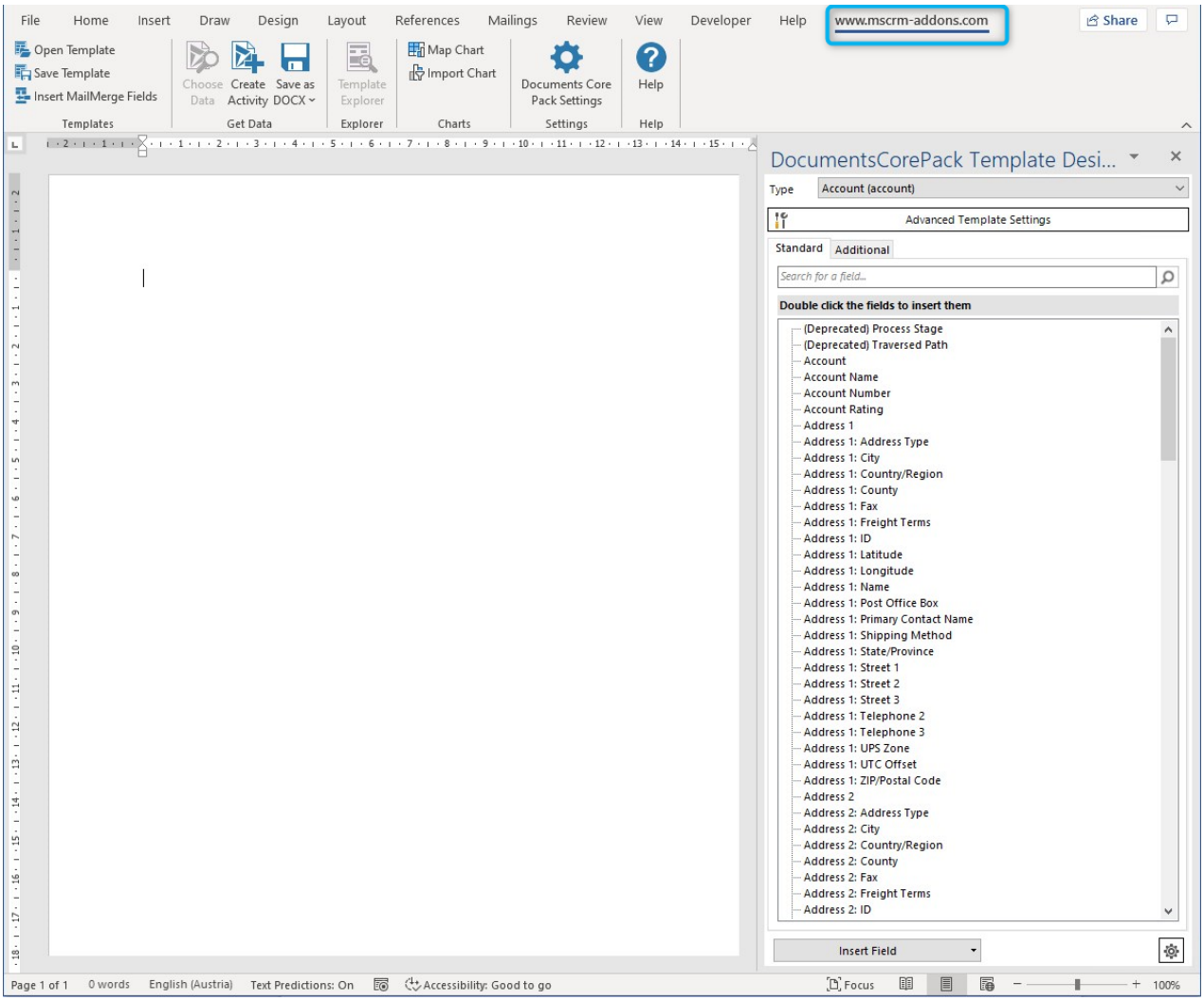
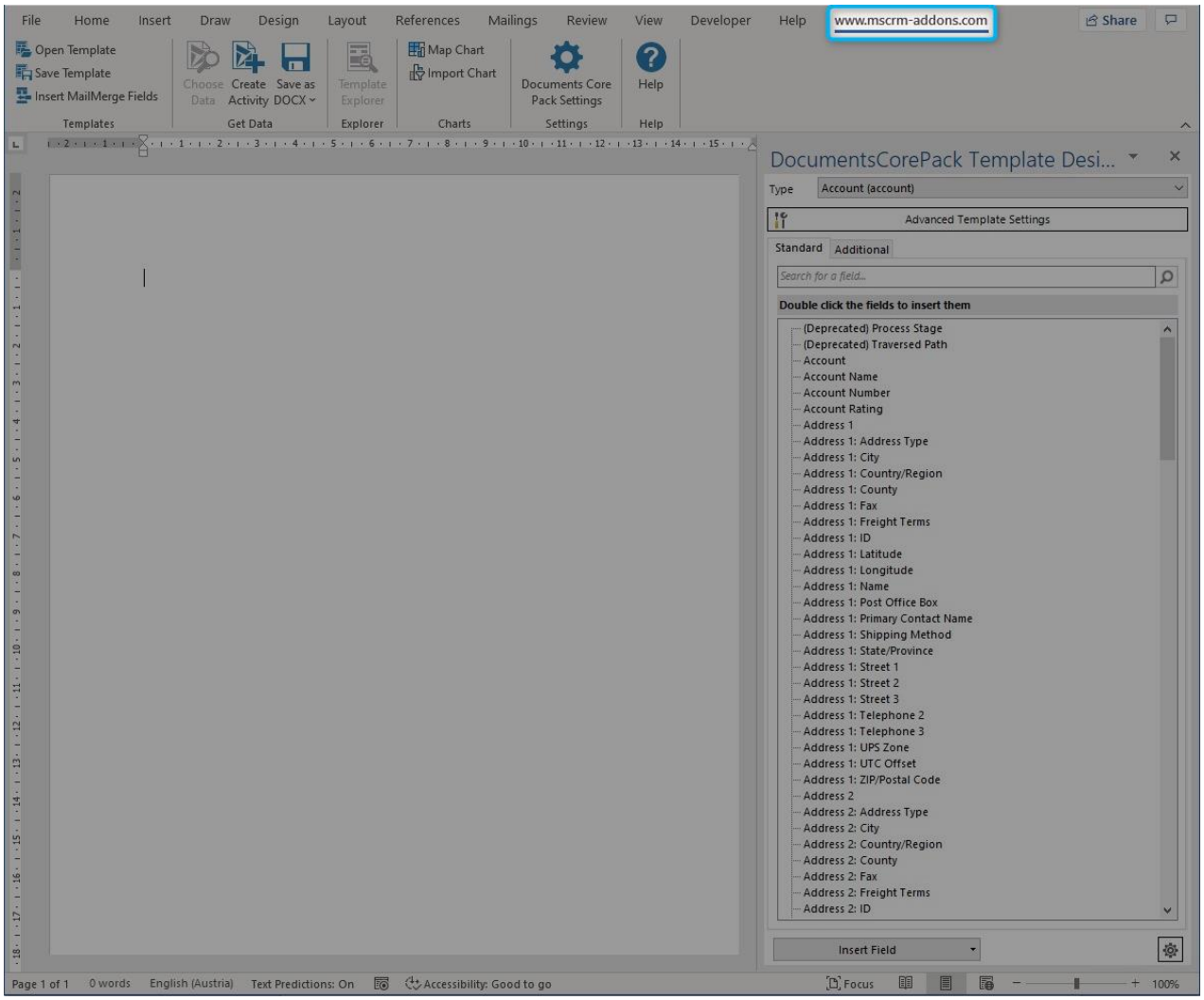


Figure 20: Word template – TemplateDesigner


File
Home
Insert
Draw
Design
Layout
References
Mailings
Review
View
Developer
Help
www.mscrm-addons.com
Share
Open Template
Save Template
Insert MailMerge Fields
Templates
Choose Data
Create Activity
Save as DOCX
Get Data
Template Explorer
Explorer
Map Chart
Import Chart
Charts
Documents Core Pack Settings
Settings
Help
Help
DocumentsCorePack Template Desi...
Type
Account (account)
Advanced Template Settings
Standard
Additional
Search for a field...
Double click the fields to insert them
(Deprecated) Process Stage
(Deprecated) Traversed Path
Account
Account Name
Account Number
Account Rating
Address 1
Address 1: Address Type
Address 1: City
Address 1: Country/Region
Address 1: County
Address 1: Fax
Address 1: Freight Terms
Address 1: ID
Address 1: Latitude
Address 1: Longitude
Address 1: Name
Address 1: Post Office Box
Address 1: Primary Contact Name
Address 1: Shipping Method
Address 1: State/Province
Address 1: Street 1
Address 1: Street 2
Address 1: Street 3
Address 1: Telephone 2
Address 1: Telephone 3
Address 1: UPS Zone
Address 1: UTC Offset
Address 1: ZIP/Postal Code
Address 2
Address 2: Address Type
Address 2: City
Address 2: Country/Region
Address 2: County
Address 2: Fax
Address 2: Freight Terms
Address 2: ID
Insert Field
Page 1 of 1
0 words
English (Austria)
Text Predictions: On
Accessibility: Good to go
Focus
100%

3 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 or contact support@mscrm-addons.com.

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