



DocumentsCorePack

Getting Started from the mscrm-addons.com website

Hello!

Thank you for your interest in [DocumentsCorePack](#). This Getting Started Guide will help you to install this Add-On from our website. For detailed information, please take a look at our [guides](#) or [blogs](#).

The web-based setup allows users to configure DocumentsCorePack Document Generation for Microsoft Dynamics 365 Online without local installations. The service, as well as licensing, can be configured and maintained on our website.

Therefore, please go to our website www.mscrm-addons.com, navigate to **1** Products, select DocumentsCorePack and click on the **2** **[Start Trial (Service Setup)]**-button as you can see in the figure below.

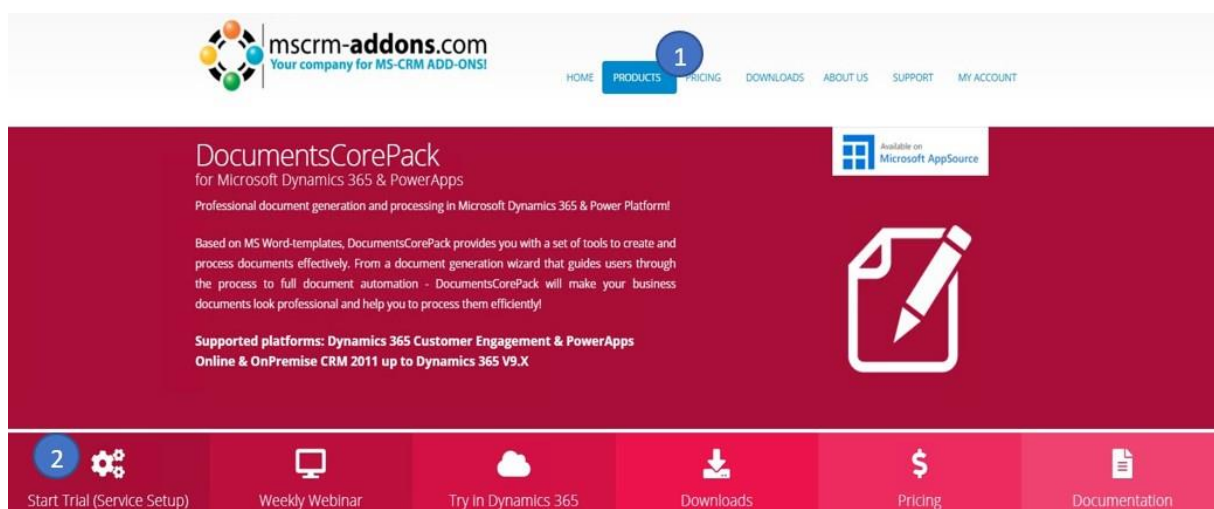


Figure 1: Open the DocumentsCorePack Online Service Configuration

Next, please login or register to mscrm-addons.com:

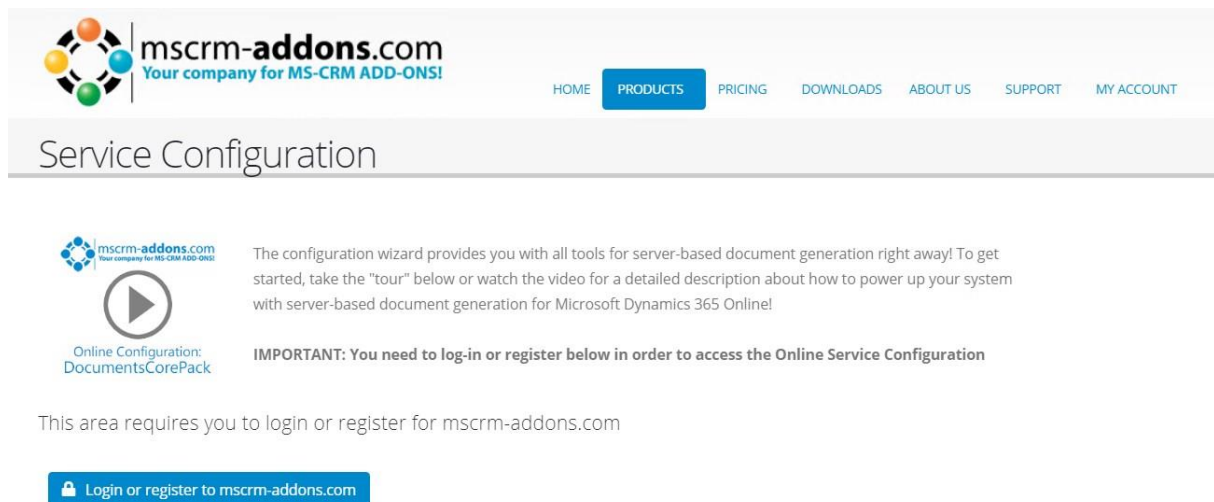


Figure 2: Login or register to mscrm-addons.com

The registration is quick and free. Once logged in, you will:

- Have access to all our **free 14-days trial** versions
- Be able to **request full support** on all trial versions
- Receive our **newsletter**
- Be **able to upgrade free trial versions to licensed products**

[So if you aren't registered yet – it's worth a try!](#)

1. Set up a DocumentsCorePack service

Once you have logged in, you will be provided with the Online Configuration window. You can set up a service with a click on the **[Add]**-button, which is highlighted in the figure below.

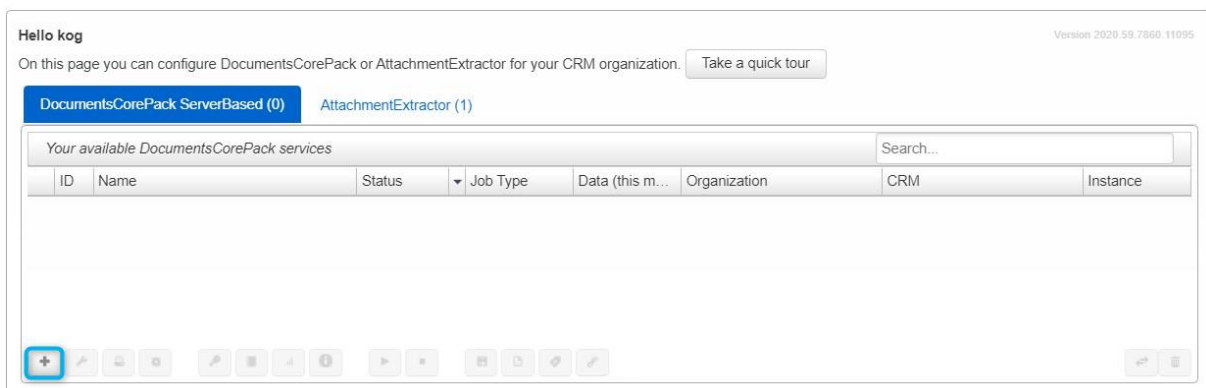
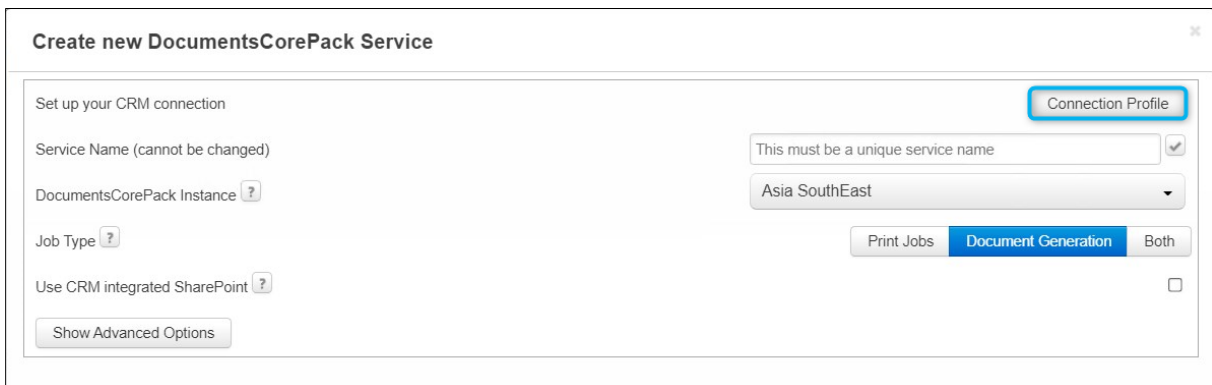


Figure 3: The Online Configuration window

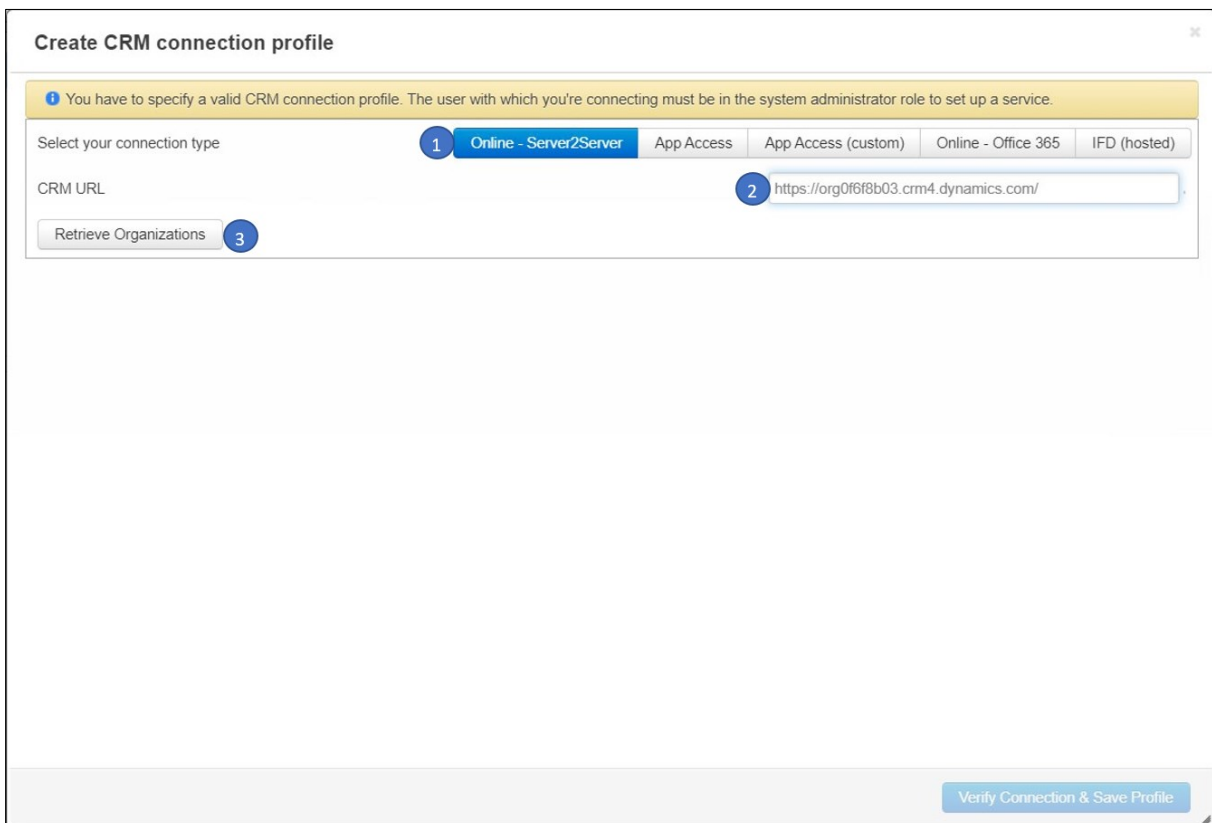
Next, click on the **[Connection Profile]**-button.



The screenshot shows a dialog box titled "Create new DocumentsCorePack Service". It contains several input fields and buttons. A "Connection Profile" button is highlighted in the top right. The "Service Name (cannot be changed)" field contains the text "This must be a unique service name". The "DocumentsCorePack Instance" dropdown menu is set to "Asia SouthEast". The "Job Type" section has three buttons: "Print Jobs", "Document Generation" (which is highlighted), and "Both". There is also a checkbox for "Use CRM integrated SharePoint" which is currently unchecked. A "Show Advanced Options" button is located at the bottom left.

Figure 4: Create a new DCP service

The window below appears. Here, you have to select:



The screenshot shows a dialog box titled "Create CRM connection profile". It features a yellow warning banner at the top stating: "You have to specify a valid CRM connection profile. The user with which you're connecting must be in the system administrator role to set up a service." Below this, there are five tabs for selecting a connection type: "Online - Server2Server" (selected and marked with a blue circle 1), "App Access", "App Access (custom)", "Online - Office 365", and "IFD (hosted)". The "CRM URL" field contains the text "https://org0f6f8b03.crm4.dynamics.com/" and is marked with a blue circle 2. A "Retrieve Organizations" button is marked with a blue circle 3. At the bottom right, there is a "Verify Connection & Save Profile" button.

Figure 5: Create a CRM connection profile

1 SELECT YOUR CONNECTION TYPE

- Server2Server, Office 365, IFD (hosted) – Server2Server is selected per default

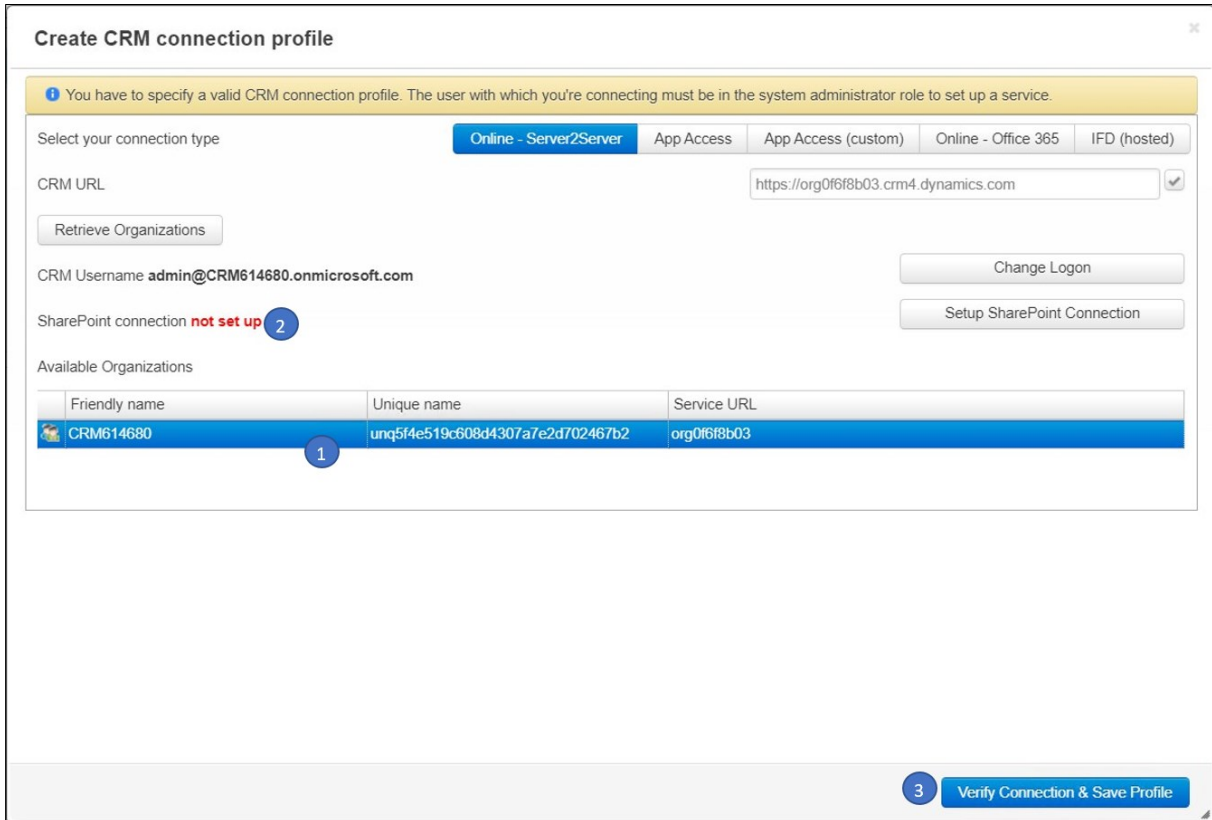
2 TYPE IN YOUR CRM URL

- for example <https://CRM698081.crm4.dynamics.com>

To finish the process, click on the **[Retrieve Organizations]**-button **3**.

This leads you to the Microsoft Sign in page, where you have to enter your credentials. Please login in with the user that should be used to connect the service with Dynamics 365 instance. Dynamics 365 administrator privileges are required!

As soon as your organization appears in the **1** Available Organizations section, it is possible to **2** set up a SharePoint connection. But in this case, click on the **3** **[Verify Connection & Save Profile]**-button to continue.



Create CRM connection profile

1 You have to specify a valid CRM connection profile. The user with which you're connecting must be in the system administrator role to set up a service.

Select your connection type: **Online - Server2Server** | App Access | App Access (custom) | Online - Office 365 | IFD (hosted)

CRM URL: ✓

CRM Username: **admin@CRM614680.onmicrosoft.com**

SharePoint connection: **not set up** **2**

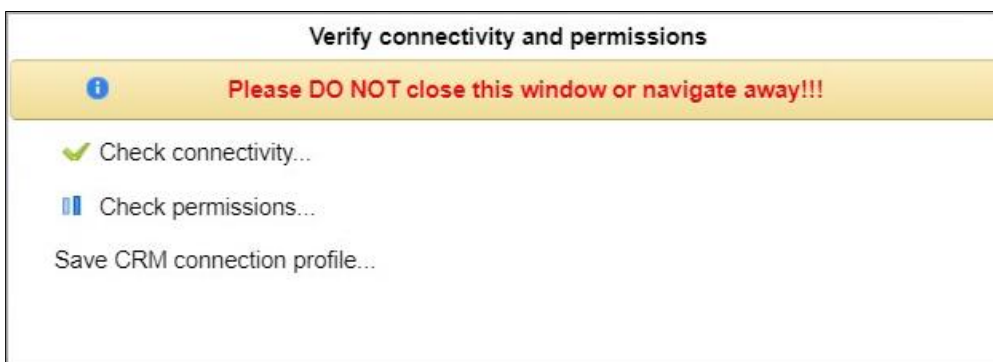
Available Organizations

| Friendly name | Unique name | Service URL |
|--------------------|----------------------------------|-------------|
| CRM614680 1 | unq5f4e519c608d4307a7e2d702467b2 | org0f6f8b03 |

3

Figure 6: Verify your connection and save your profile

Now the following window appears. It is important that you do not close this window or navigate away.



Verify connectivity and permissions

1 **Please DO NOT close this window or navigate away!!!**

- ✓ Check connectivity...
- || Check permissions...
- Save CRM connection profile...

Figure 7: Verify connectivity and permissions

You are now back in the same window as before. This window supports you in creating a new service.

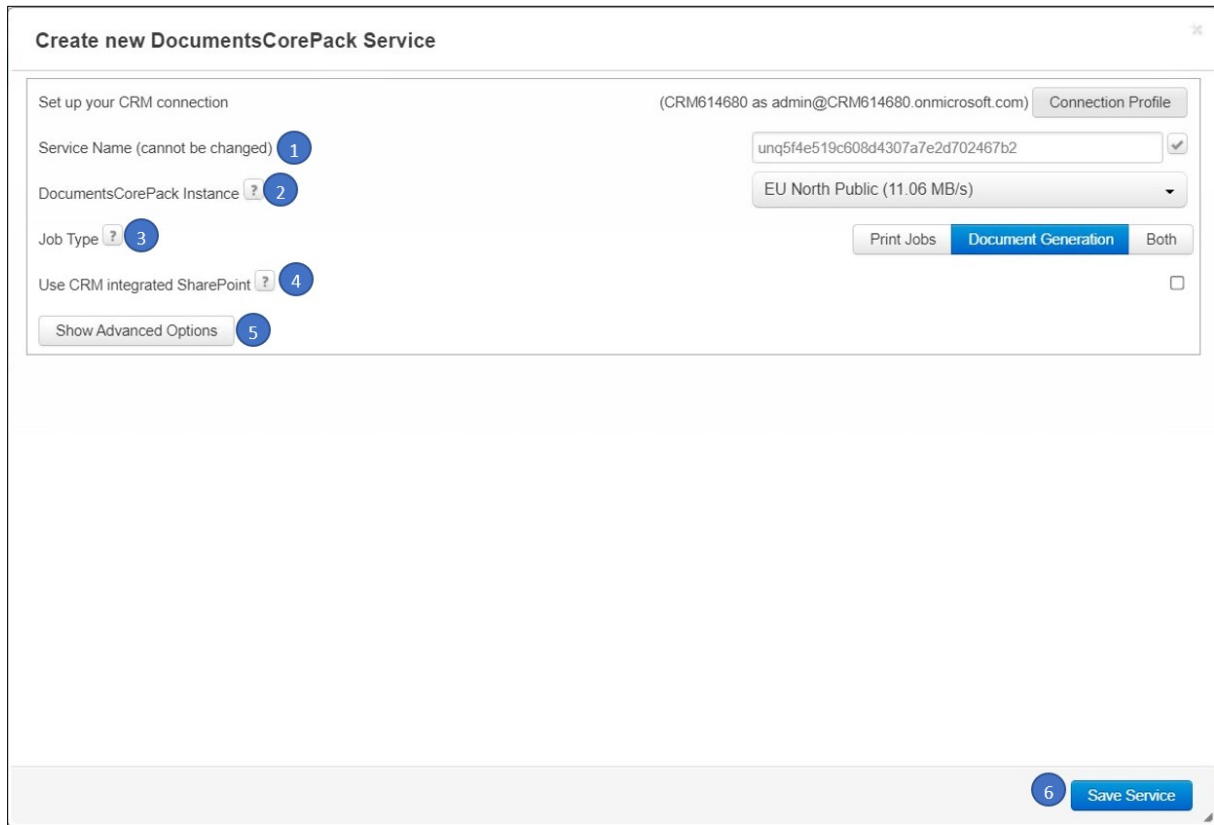


Figure 8: Create a new DCP service

1 SERVICE NAME

Please enter your service name here. But choose wisely, because the name cannot be changed anymore!

2 DOCUMENTSCOREPACK INSTANCE

Please select on which instance the DocumentsCorePack Service should run. The instance with the highest bandwidth is automatically selected for you.

3 JOB TYPE

Specify here which jobs should be processed by the Service.

4 SHAREPOINT INTEGRATION

Enable this settings when the documents should be stored in the CRM integrated SharePoint. Otherwise the documents will be stored as note attachments.

5 SHOW ADVANCED OPTIONS (OPTIONAL)

A click on this button, allows you to refine the settings of your new service. More information about these options can be found in the corresponding [documentation](#) on page 21.

Next, click on the **6 [Save Service]**-button in the right lower corner in order to proceed. Click on the **[OK]**-button in the window that appears now (see figure below).

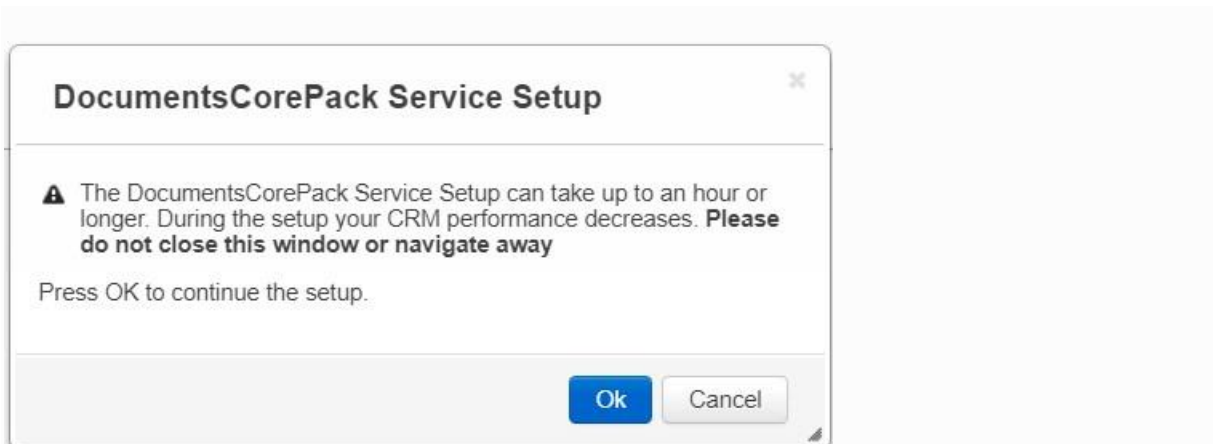


Figure 9: Create a new DCP service

As soon as the service configuration is completed, you will be informed about the next steps you can take. Click on the License Status-option in order to check your license status. Please read the instructions carefully and click on the **[OK]**-button in order to proceed.

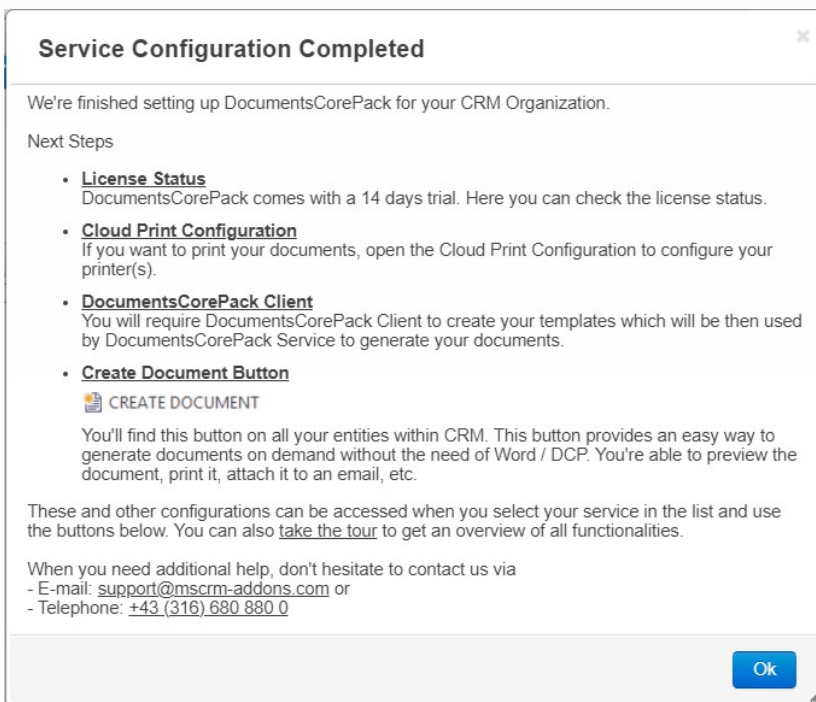


Figure 10: Service Configuration Completed

Congratulation! You have finished the configuration of your service. You are now redirected to the service configuration overview (see figure below). The DocumentsCorePack service is already running. Using the buttons at the end of the service overview, you can define which steps you would like to take next. Please find a brief description of the DocumentsCorePack buttons in the corresponding [documentation](#) on page 10.

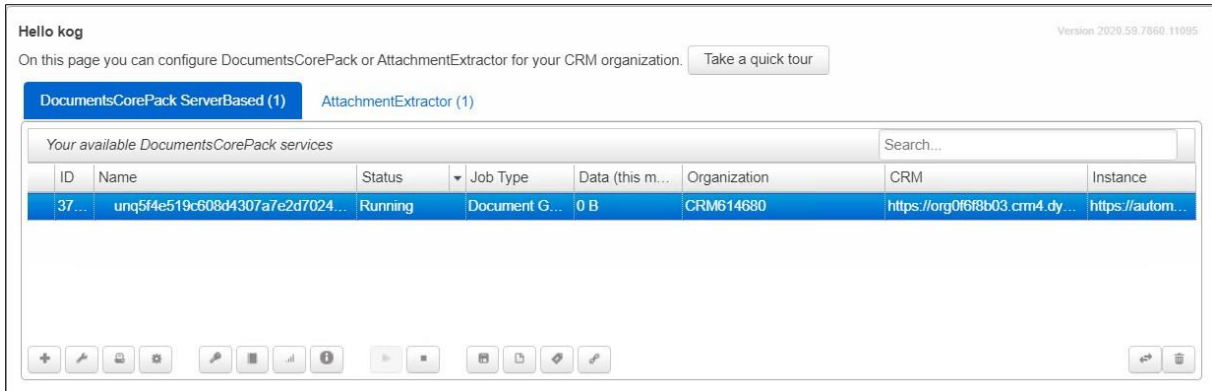


Figure 11: Service Configuration Overview

2. 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.

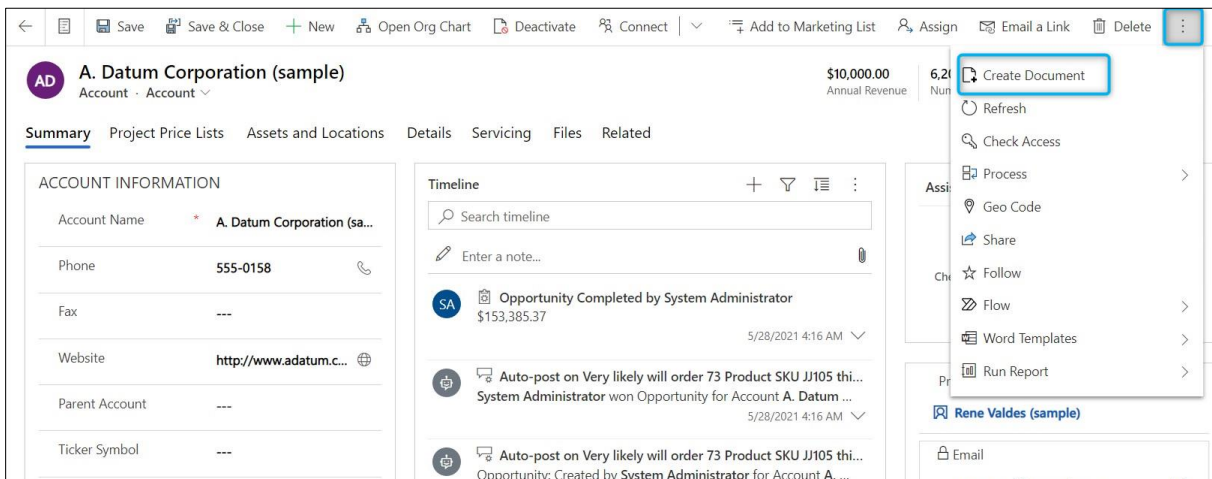


Figure 12: The Create Document functionality

- 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.

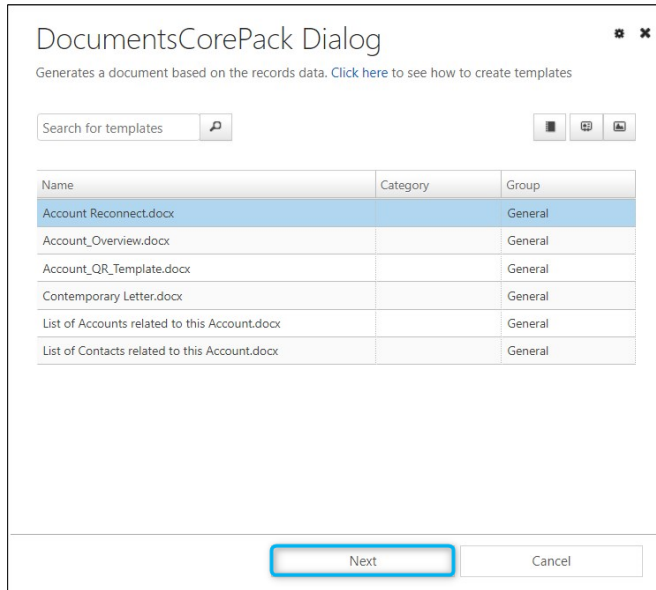


Figure 13: The DocumentsCorePack Dialog

- 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.

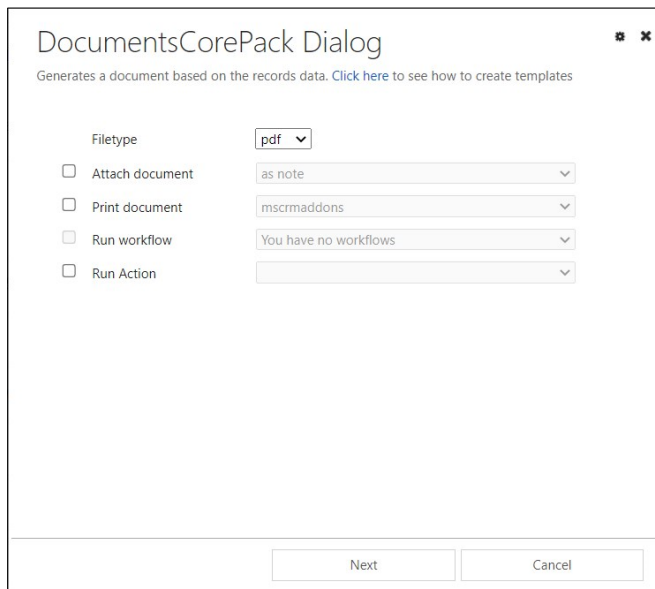


Figure 14: The DocumentsCorePack Dialog options

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

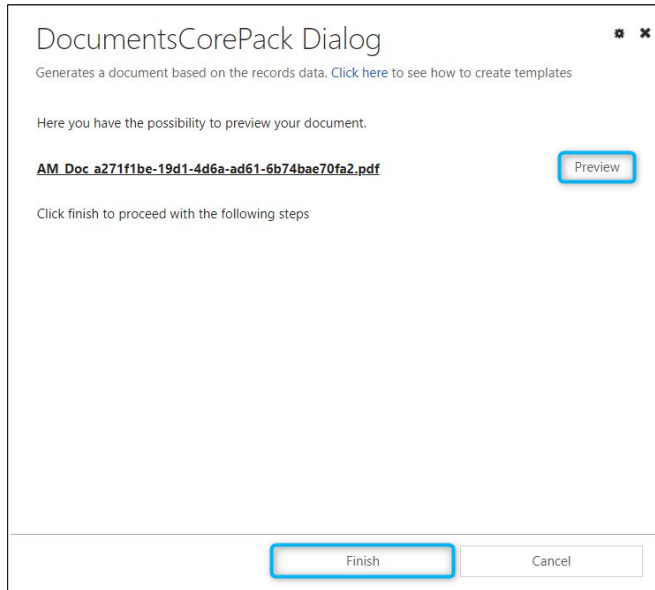


Figure 15: The DocumentsCorePack Dialog: Preview document

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

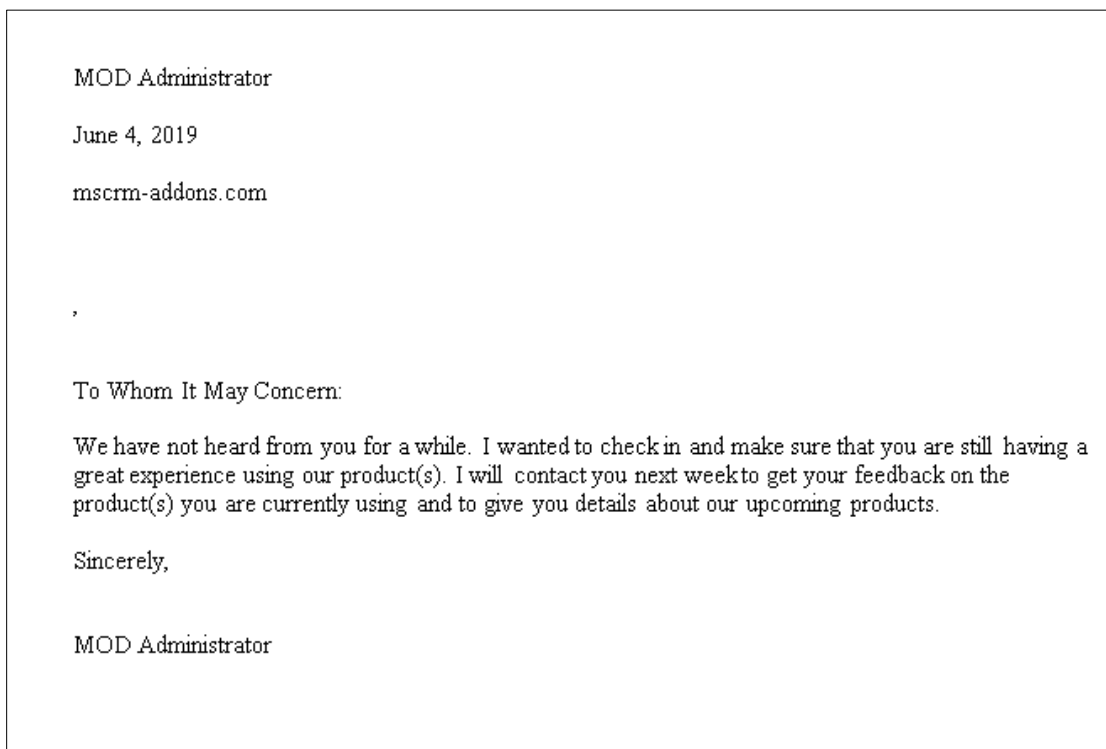


Figure 16: PDF of Account Reconnect template

3. Create your own templates

To create own custom templates, you require the DocumentsCorePack 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 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 templates.

Please find more information on how to use the Template Designer in the corresponding [DocumentsCorePack Template Designer guide](#).

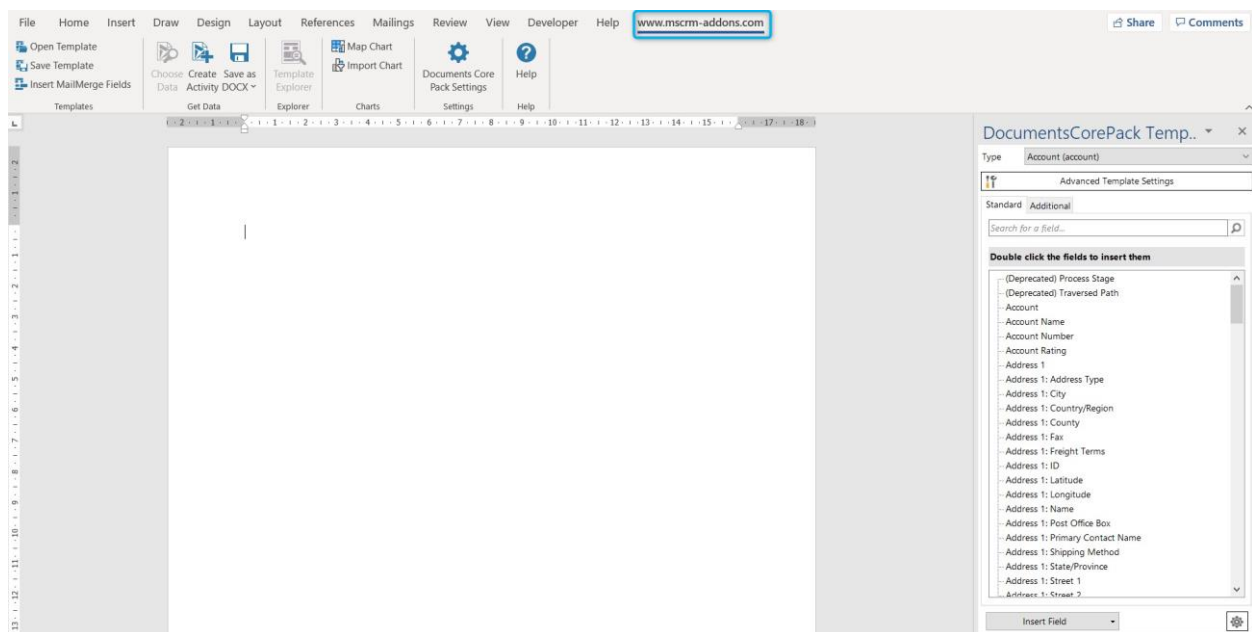


Figure 17: Microsoft Office Word with mscrm-addons ribbon

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.

1 List of figures

- Figure 1: Open the DocumentsCorePack Online Service Configuration 1
- Figure 2: Login or register to mscrm-addons.com 2
- Figure 3: The Online Configuration window 2
- Figure 4: Create a new DCP service 3
- Figure 5: Create a CRM connection profile 3
- Figure 6: Verify your connection and save your profile 4
- Figure 7: Verify connectivity and permissions 4
- Figure 8: Create a new DCP service 5
- Figure 9: Create a new DCP service 6
- Figure 10: Service Configuration Completed 6
- Figure 11: Service Configuration Overview 7
- Figure 12: The Create Document functionality 7
- Figure 13: The DocumentsCorePack Dialog 8
- Figure 14: The DocumentsCorePack Dialog options 8
- Figure 15: The DocumentsCorePack Dialog: Preview document 9
- Figure 16: PDF of Account Reconnect template 9
- Figure 17: Microsoft Office Word with mscrm-addons ribbon 10

2 Contact

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

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