



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



**PRODUCT  
CATALOG**

Push the boundaries of  
**Microsoft Dynamics 365** with our addons!



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

## Who we are

mscrm-addons.com is a Microsoft Gold Certified Partner, providing high-quality software solutions. We have specialized in developing add-ons for Microsoft Dynamics 365, Power Apps & Power Automate. When talking about Dynamics 365 in this brochure, we refer to the modules Sales, Customer Service, Field Service and Project Service Automation.

## Why mscrm-addons.com?

We strive to develop products that are practical, easy to use and innovative. We aim to provide technical solutions that exactly meet our customer's needs. Our well trained, highly certified staff and our excellent knowledge of Microsoft technologies guarantee that we provide only the best solutions for our customers.



# DocumentsCorePack (DCP)

Professional document generation, processing and automation



## Document Generation & Processing – How does it work:

Documents are crucial in every Dynamics 365 implementation. Whether you need to send sales or service documents, internal reports or contracts for signing, DocumentsCorePack will help you streamline and simplify your requirements.

1. Design: The easy, intuitive and powerful handling of the Template Designer extends the capabilities of Microsoft Word with an interface to Microsoft Dataverse.
2. Generate: Create individual or batch documents in various formats within Dynamics 365, Power Apps, Power Automate & Canvas Apps.
3. Process & Deliver: Every document generated has a purpose. The extensive options provided by our CommandBar dialog will speed up your document-related business processes & reduce your user's workload.
4. Automate: The DocumentsCorePack connector allows you to use the full suite of document generation & delivery options with Power Automate (Flow) or classic Dynamics 365 workflows enabling full document automation.

**DocumentsCorePack Dialog**  
Generates a document based on the records data. Click here to see how to create templates

Let me decide every step (available for users)  
Select this option to decide everything within this dialog by yourself.

**send Quote**  
create Quote, email content, save to SharePoint and open in Microsoft Word

**Proposal**  
select Documents and attach to nice email

Next Cancel

**TEST Center**  
To: Mastermann, Max  
Musterstraße 8 10  
Bad ABC DEF 65558

mscrm-addons.com  
Professional document generation, processing and automation

Dear Max Mastermann,  
Thanks for the interest in our products.

No.	Product Name	Quantity	Price Per Unit €	Amount €
	Documents Core Pack CRM 4.0	10,00	50,00 €	450,00 €
	MS CRM 4.0 PowerSearch Server (incl.3 Clients)	1,00	600,00 €	540,00 €
	PowerSearch CRM 4.0	7,00	35,00 €	226,80 €
	ActivityTools CRM 4.0	10,00	35,00 €	324,00 €
	TelephoneIntegration CRM 4.0 (Server (incl.5 Calls)	1,00	550,00 €	493,00 €
	<b>Total:</b>			<b>2.033,80 €</b>

This quote is valid for 30 days from today.

**Payment conditions:**  
Normally you have to pay at our online-shop and to pay in advance with Rapid, MasterCard, VisaCard or American Express.  
If you prefer to pay by bank transfer, this is also possible, but we cannot forward the software-activation key until the payment arrives in our account.

**One-Click-Actions:** Pre-define your document operations like send quote as pdf and print.



## Document Automation

- PowerApps–Connector: The DocumentsCorePack connector for Power Automate and Canvas Apps allows you to utilize your document capabilities in your custom applications and background processes (Flows)
- Dynamics 365 processes integration: Automate your document processes via Dynamics 365 workflows or Microsoft Flow
- Reducing your user’s workload and standardizing your internal and external documents
- Scheduled reports (daily, weekly, monthly)

Use cases:

- Payment and shipping confirmation
- Send quote on activation
- Weekly service or sales report

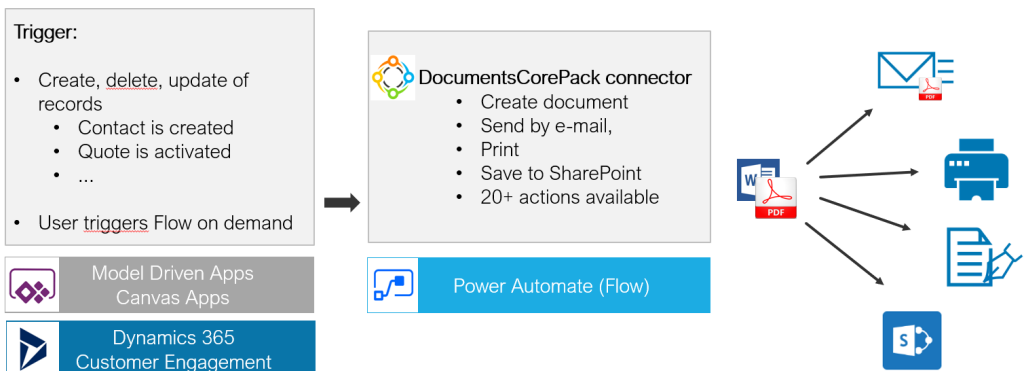
“Maisons Pierre is a company who builds around 2000 houses per year. Their business requires a lot of document creation such as sales contracts, town planning, finance and a lot more. Thanks to DocumentsCorePack we were able to automate all these document generation processes, structure their files in SharePoint and use DocuSign in DocumentsCorePack to secure and accelerate the customer engagement.

Frédéric Skobel, Consultant CRM”

1. Event occurs in your environment and triggers a Flow



2. Within the Flow, DocumentsCorePack provides a broad variety of actions to automatically create and process documents



## Template Design

- Microsoft Word based: No design/feature limitations
- Dynamics 365 connector: Map any fields from Dynamics 365 or DataVerse
  - Unlimited support for relationships
  - Filter & sort data
  - All attribute types supported
- Special features: Embedding of pictures, sub-documents, e-Signature tags, HTML, QR-codes ...  
(See table on page 7)

The screenshot displays the Microsoft Word interface with a document titled 'Quote.docx'. The ribbon includes 'File', 'Home', 'Insert', 'Draw', 'Design', 'Layout', 'References', 'Mailings', 'Review', 'View', 'Help', and 'www.msrm-addons.com'. The 'Design' pane is active, showing 'Advanced Template Settings' for 'DocumentsCorePack Templ...'. The document content includes a header for 'TCS The Computer Shop' with contact details, a 'Quote to' section with fields like '<<customerid\_account\_name>>', and a 'QUOTE' section with a list of items. A callout box notes: 'Fields can be modified and thus, displayed in individual formats and various culture styles.' Another callout box states: 'The Template Designer integrates into MS Word allowing users to design templates using Dynamics 365 data.'

DocumentsCorePack is available for:  
Dynamics 365 Customer Engagement & PowerApps, Online and On Premise



## DocumentsCorePack vs. Out-of-the-box Dynamics 365

	DocumentsCorePack	Native Dynamics 365
<b>Key Differences</b>		
Microsoft Word based Template Designer	✓ Easy to use Word Add-In	✓ XML-based mapping via developer ribbon
Mapping of Dataverse data:	Multi-Level	Limited to 1 level
- Resolve relationships	✓	✗
- Filter & sort results	✓	✗
- Formatting (e.g. date, money values)	✓	✗
Connector for Power Automate & Power Apps:		
- Full document automation via Flows	✓	✗
- Document generation & processing in Canvas Apps	✓	✗
One-Click document processes:		
- Generate and process documents with a single click	✓ All document generation & processing options	✓ Only in Sales App
Batch document generation & delivery	✓	✗
Template Management:		
- Test templates during the design	✓	✗
- Versioning	✓	✗
- Guided provisioning between environments	✓	

### Document Generation & Automation

Available in:		
- Dynamics 365 CE	✓	✓
- Model Driven Power Apps	✓	✓
- Power Automate (Microsoft Flow)	✓	✗
- Canvas Apps	✓	✗
Command bar dialog	All Dynamics 365 CE & Model driven Apps	Only in Sales App
One-Click-Actions:		
- Generate documents	✓	✓
- Process documents	✓	Only in Sales App
- Review & edit documents	✓	✗
- Access restrictions via security roles	✓	✗
Supported file types	.DOCX, .PDF, .HTML, .TXT, ...	.DOCX, .PDF
Batch document generation & processing	✓	✗
Dynamic document names	✓	✗
Use data from an external database	✓	✗
Incorporate user input during document creation	✓	✗
Document preview	✓	Only in Sales App
Edit documents upon creation before processed	✓ In MS Word automatically	✓ In MS Word manually
Document automation via Dynamics 365 workflows	✓ All document generation & processing options	✓ Only attach as note
Document automation via Power Automate	✓ DocumentsCorePack Connector	✗

## DocumentsCorePack vs. Out-of-the-box Dynamics 365

	DocumentsCorePack	Native Dynamics 365
<b>Document Processing &amp; Delivery</b>		
Generate e-mail attachments	✓	Only in Sales App
Generate e-mail content	✓	✗
Generate and attach to activity	All activity types	✗
Attach as note	✓	Only in Sales App
Save to SharePoint: - Dynamic save locations - Create SharePoint locations - Write metadata to SharePoint	All file types ✓ ✓ ✓	Only in Sales App ✗ ✗ ✗
Send for e-Signing (AdobeSign, DocuSign, AssureSign)	✓	✗
Protect files (PDF & password protection)	✓	✗
Run processes upon document generation (Flows, Workflows)	✓	✗
Local & Cloud Printing	✓	✗
Combine documents	✓	✗

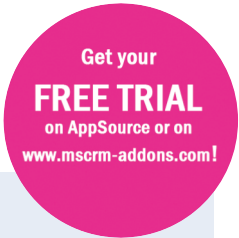
### Template Design

Relationships: - One-to-Many, Many-to-One, Many-to-Many - Multiple levels - Filter related records - Sort related records	✓ ✓ ✓ ✓	✓ ✗ ✗ ✗
Data Manipulation: - Grouping - Calculations - String manipulation	✓ ✓ ✓	✗ ✗ ✗
Conditions & conditional content (if / else)	Condition Designer	Word Field Function
Formatting of DataVerse data: - Field-type specific formatting (e.g. Date, money fields) - Conditional formatting	✓ ✓	✗ ✗
Dynamic images: - Entity images - Images from notes (stored in Dataverse) - Images from URL (stored in Dataverse)	✓ ✓ ✓	✓ ✗ ✗
Dynamic content: - Charts (presenting Dataverse data) - Document name - Hyperlinks - QR Codes - HTML (stored in Dataverse) - Filters	✓ ✓ ✓ ✓ ✓ ✓	✗ ✗ ✗ ✗ ✗ ✗
e-Signature (predefine tags for): - AdobeSign - DocuSign - AssureSign	✓ ✓ ✓	✗ ✗ ✗
Work with sample data	✓	✗



## AttachmentExtractor (AE)

Save money and Dynamics 365 data storage by moving e-mail attachments, notes and e-mail content



### Your benefits at a glance:

#### Challenges:

- Received e-mail attachments, notes and e-mail content lead to high demand on storage capacity and expensive database space.

#### Solution:

- AttachmentExtractor saves money and Dynamics 365 data storage by moving e-mail attachments, notes and e-mail content to SharePoint or Azure Blob Storage
- Files are replaced with links inside Dynamics 365 so users will not see a difference when accessing extracted content! Our solution improves business processes by running in the background and saves money and database storage in Dynamics 365

#### Custom extraction rules:

- Touch only e-mails related to certain entities (Whitelist) or block entities (Blacklist)
- Set up a scheduler to perform tasks (e.g.: extract weekly, daily...)
- Archive data define extraction based on date/time values (older than X years)

“ Attachment Extractor is our go-to solution when a customer has files stored in Dynamics 365. It's simple to configure and monitor and provides a seamless solution to move big files to SharePoint.

Heidi Neuhauser, CRM Heidi ”



AttachmentExtractor is available for:  
Dynamics 365 Customer Engagement & PowerApps, Online and On Premise





## ActivityTools (AT)

Add some Outlook-feeling to Microsoft Dynamics 365 activities



### Your benefits at a glance:

360° view on all activities related to a record:

- List view: Show activities in reverse chronological order
  - Advanced search and filter capabilities (content, status, type, date-range)
  - Preview pane: Direct preview of activities and attachments
  - Load “on-demand” to ensure high performance
- 
- Fully customizable layout and preview pane
  - Can be embedded into any entity form or dashboards
  - Support for user-views (inbox) and queue-views

ActivityTools provides you with a list of all related activities. Create, search & filter activities from within the menu.

The preview pane shows the content of the selected activity. All details can be opened from this preview pane.

ActivityTools is available for: Dynamics 365 Customer Engagement & PowerApps, Online and On Premise



## Telephone Integration (TI)

Connect your phone system to Dynamics 365



### Your benefits at a glance:

Capture and track phone calls:

- Caller Recognition: Once a call is recognized, our solution will search the Dynamics 365 system and display information about the caller
- Screen Pops: Dynamics 365 records and call activities can be configured to automatically pop-up on incoming and outgoing calls
- Auto creation of Dynamic 365 records: Create new records on incoming calls (e.g. phone calls, tasks, cases, opportunities, accounts, contacts or leads)

Simplify dialing:

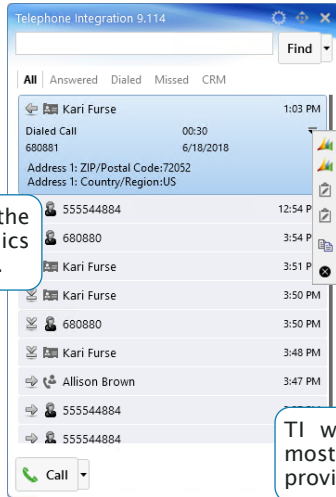
- Click2Dial on a phone number or with a click on the 'Call number'-button in the command bar from within the balloon simply by entering the phone number
- 'Dialing from related records' enables you to call phone numbers from related records (e.g. call directly from an opportunity)

Additional features:

- Call statistics inside Dynamics 365: Track every call  
This allows you to analyze your calls based on Dynamics 365 dashboards
- The PowerDialer supports dialing lists  
Dialing lists are created directly from campaign activities or power dialing entities in Dynamics 365
- Supports Unified Service Desk (USD)  
Instead of opening Dynamics 365 records in your browser, the Dynamics 365 records (contact, account, lead) are opened in the USD Client

Supported phone systems

- HTTP API/SIP Client (connect via VoIP thanks to our built-in SIP Client wrapper)
- TAPI driver enabled phone systems like Cisco, Alcatel, Siemens and many more
- RingCentral
- Interactive Intelligence



The balloon builds the bridge between Dynamics 365 and phone systems.

TI works well with the most popular phone providers in the market.



SDK



SIEMENS



TelephoneIntegration is available for:  
Dynamics 365 Customer Engagement & PowerApps, Online and On Premise



## SmartBar (SB)

Navigate in Microsoft Dynamics 365 like a pro

Get your  
**FREE TRIAL**  
on AppSource or on  
[www.mscrm-addons.com](http://www.mscrm-addons.com)!

### Your benefits at a glance:

- Smart navigation between related Dynamics 365 records (Simple back & forth navigation)
- Configurable Views: Display critical information like “Open Cases” or “Opportunities over 10K”
- Numbers next to the button indicate the number of related records per entity (e.g. the number of quotes, orders, etc. related to the opened record is counted)
- Color-coding: Hide buttons or change button color based on defined count ranges
- Drag & drop functionality enables users to change the buttons order
- Display SmartBar in Standard or Metro Style, a vertical/horizontal order and various colors
- Create custom buttons (JavaScript Function, Links, Views, Entity/SiteMap, Scroll to section)
- Fully customizable look & feel: Embedded into any entity or dashboard (personal menus)
- Show/Hide buttons based on count or field values

ACCOUNT

MSCRM-ADDONS.com

ACCOUNT OVERVIEW

ACCOUNT INFORMATION

Orders	Cases 10	Quotes 3	Activities 59
Notes 5	Invoices 6	Contacts 5	

SmartBar buttons allow count of & quick access to related records.

Customizable color & size give a clear overview on related records.

SmartBar is available for:  
Dynamics 365 Customer Engagement & PowerApps, Online and On Premise



## PowerSearch (PS)

Finding records in Microsoft Dynamics 365 has never been easier



### Your benefits at a glance:

Search capabilities:

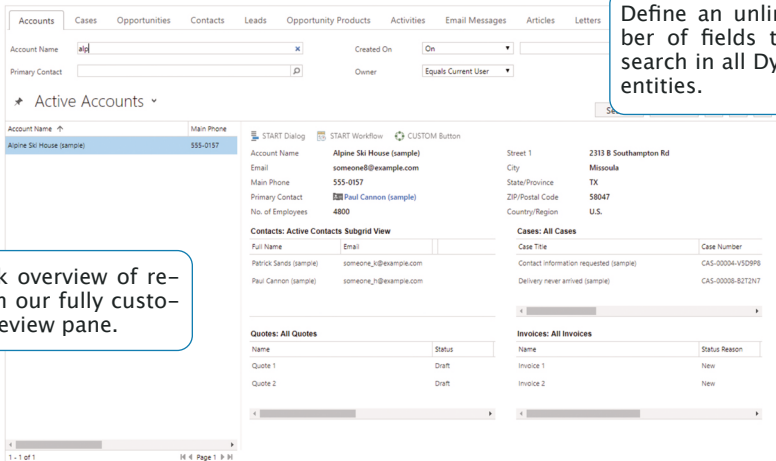
- Simple UI for complex reusable queries
- All search operators supported (as in Advanced Find)
- Support of AND/OR keywords
- User defined default search values

Working with results:

- Result preview: View result details without opening them
- Customizable grid with access to results and related records
- Open results in Dynamic 365 grids to support common tasks (bulk edit, export to Excel, ...)
- Execute workflows/actions against results (single & bulk)

Configuration:

- Fully customizable search & result fields
- Customizable previews and actions
- Convert Advanced Find via fetch import



Define an unlimited number of fields that allow a search in all Dynamics 365 entities.

Get a quick overview of results within our fully customizable preview pane.

PowerSearch is available for:  
Dynamics 365 Customer Engagement & PowerApps, Online and On Premise



## GroupCalendar (GC)

Schedule & reschedule users, groups and resources via drag & drop



### Your benefits at a glance:

#### Scheduling feature:

- Define/select/display users, teams, resources and/or resource groups
- Display time-off and working hours of your users
- Color coding of activities manually or via business rules
- Print & Print preview
- Fully customizable content
- Embed our add-on into any entity

#### Views:

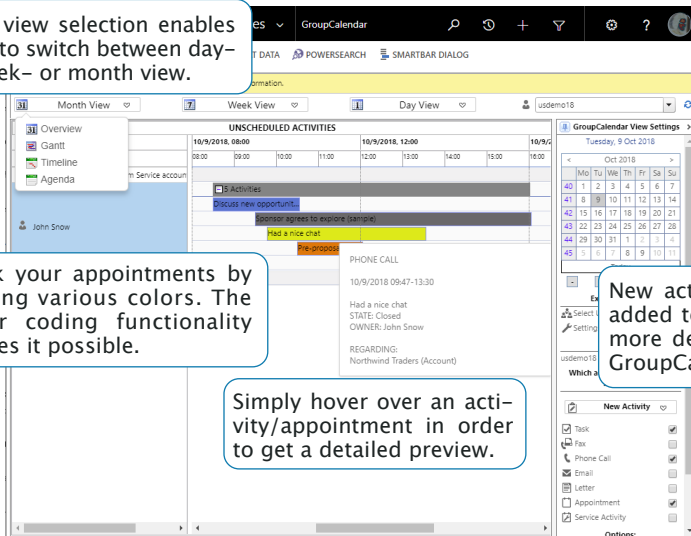
- All views available in day-, week- or month-view
- TopDown-view (like Outlook), List-view, Gantt-view, Timeline-view and Agenda-view

The view selection enables you to switch between day-, week- or month view.

Mark your appointments by adding various colors. The color coding functionality makes it possible.

Simply hover over an activity/appointment in order to get a detailed preview.

New activities can be quickly added to the calendar. Create more detailed ones using the GroupCalendar SideBar.



GroupCalendar is available for:  
Dynamics 365 Customer Engagement & PowerApps, Online and On Premise



## Partner Program

Working with partners is the key to success!

### Your benefits at a glance:

Our resellers form a major part of our distribution network. They integrate our Add-ons in their one-stop-shop solutions for clients all over the world and therefore enable easy access to our products on local markets. We appreciate the mutual partnership and our reseller's commitment.

- Partner Levels:  
Different partnership levels based on annual revenue generated with mscrm-addons
- Reseller margin for all sales of our solutions:  
Your margin depends on your annual sales volume
- Free Internal Use and Resell – licenses  
After signing up, you will be provided with free licenses valid for 3 months. Once a license is sold, the licenses are extended for a further year
- Ongoing Educational offering for your team  
Free support via e-mail, online-chat/-sessions, or telephone, frequent online training to keep your consultants and sales teams up to date
- Weekly Live Demonstrations of our Add-ons for Dynamics 365  
Every week you can join us for live overviews and demonstrations of our Add-ons to explore how our solutions can be used to increase usability and productivity
- Improve your Dynamics 365-offer without investing time in development & support  
Partners can boost their Dynamics 365 offering without the need to develop & support the solutions involved
- No Dynamics 365-service competition: mscrm-addons.com is a strict non-revenue ISV  
To avoid potential partner conflicts, we do not provide Dynamics 365 services. We always pass on customer requests to our partners. If our partners need assistance and request our help, we offer development services (hourly rate on request)
- Building long-term relationships with your customers  
By providing a point of contact when it comes to working with our solutions, our partners can establish and maintain long-term relationships with their customers
- NO Minimum, NO Fees

If you are interested in becoming a reseller, please register on our website and fill & submit the reseller form, which can be found under the link below:

[www.mscrm-addons.com/About-us/Partner-Program/Become-a-reseller](http://www.mscrm-addons.com/About-us/Partner-Program/Become-a-reseller)



## Pricelist in EUR

Product	Normal License* <sup>1</sup>		„PerUser“ License* <sup>2</sup>	
	monthly	annually	monthly	annually
GroupCalendar (GC)	€ 3,00	€ 30	€ 6	€ 60
ActivityTools (AT)	€ 2,50	€ 24	€ 5	€ 48
PowerSearch (PS)	€ 2,50	€ 24	€ 5	€ 48
SmartBar (SB)	€ 1,60	€ 15	x	x
TelephoneIntegration (TI)	x	x	€ 6	€ 60

\*1... Normal-license: You will need to buy as many licenses as there are active users in your Dynamics 365 system

\*2... „PerUser“-license: GC, AT and PS require a minimum amount of 10. TI requires a minimum of 5



## Pricelist in EUR

### DocumentsCorePack (DCP)

Package	monthly	annually	Documents incl.	TD* <sup>1</sup>
XS (≤ 10 users)	€ 65	€ 690	500	1
S (11 - 30 users)	€ 105	€ 1.140	1.000	1
M (31 - 80 users)	€ 175	€ 1.770	5.000	2
L (81 - 140 users)	€ 225	€ 2.400	10.000	2
XL (141 - 300 users)	€ 460	€ 4.990	25.000	5
XXL (301 - 600 users)	€ 870	€ 9.060	50.000	10
Enterprise (600+ users)	on request			
Additional Packages				
1,000 documents	€ 12	€ 100	x	
1 Template Designer	€ 8	€ 80	x	

### AttachmentExtractor (AE)

Package	annually	Bandwidth* <sup>2</sup>
XS (≤ 10 users)	€ 690	2,5 GB
S (11 - 30 users)	€ 1.140	5 GB
M (31 - 80 users)	€ 1.650	10 GB
L (81 - 140 users)	€ 2.075	15 GB
XL (141 - 300 users)	€ 3.100	20 GB
XXL (301 - 600 users)	€ 5.450	25 GB
Enterprise (600+ users)	on request	

\*1 ... TD = Template Designer included in this package

\*2 ... The amount of data that can be transmitted per month



## Pricelist in USD

Product	Normal License* <sup>1</sup>		„PerUser“ License* <sup>2</sup>	
	monthly	annually	monthly	annually
GroupCalendar (GC)	\$ 4.00	\$ 42	\$ 8	\$ 84
ActivityTools (AT)	\$ 3.00	\$ 30	\$ 6	\$ 60
PowerSearch (PS)	\$ 3.00	\$ 30	\$ 6	\$ 60
SmartBar (SB)	\$ 2.00	\$ 21	x	x
TelephoneIntegration (TI)	x	x	\$ 8	\$ 84

\*1... Normal-license: You will need to buy as many licenses as there are active users in your Dynamics 365 system

\*2... „PerUser“-license: GC, AT and PS require a minimum amount of 10. TI requires a minimum of 5

## Pricelist in USD

DocumentsCorePack (DCP)				
Package	monthly	annually	Documents incl.	TD* <sup>1</sup>
XS (≤ 10 users)	\$ 80	\$ 825	500	1
S (11 - 30 users)	\$ 145	\$ 1,500	1,000	1
M (31 - 80 users)	\$ 240	\$ 2,520	5,000	2
L (81 - 140 users)	\$ 310	\$ 3,240	10,000	2
XL (141 - 300 users)	\$ 590	\$ 6,000	25,000	5
XXL (301 - 600 users)	\$ 1,120	\$ 11,760	50,000	10
Enterprise (600+ users)	on request			
Additional Packages				
1,000 documents	\$ 15	\$ 150	x	
1 Template Designer	\$ 10	\$ 110	x	

AttachmentExtractor (AE)		
Package	annually	Bandwidth* <sup>2</sup>
XS (≤ 10 users)	\$ 825	2,5 GB
S (11 - 30 users)	\$ 1,500	5 GB
M (31 - 80 users)	\$ 2,030	10 GB
L (81 - 140 users)	\$ 2,640	15 GB
XL (141 - 300 users)	\$ 4,080	20 GB
XXL (301 - 600 users)	\$ 7,200	25 GB
Enterprise (600+ users)	on request	

\*1 ... TD = Template Designer included in this package

\*2 ... The amount of data that can be transmitted per month



### DocumentsCorePack

Professional document generation and processing in Dynamics 365



### AttachmentExtractor

Extract files and e-mail attachments to SharePoint or Azure Blob



### TelephoneIntegration

Connect your phone system with Microsoft Dynamics 365



### ActivityTools

Simple overview of Dynamics 365 activities Outlook - Look & Feel for e-mails



### SmartBar

Smart navigation between related Dynamics 365 records



### PowerSearch

Combine the simplicity of Dynamics 365 Search with the features of Advanced Find



### GroupCalendar

Effective scheduling of users, teams and resources in Dynamics 365

Get your **14 Days Free Trial** for all our solutions!

Microsoft

mscrm-addons.com



SCAN ME



SCAN ME

### EUROPE

**T** +43 316 680 880

**M** sales@mscrm-addons.com  
support@mscrm-addons.com

**W** www.mscrm-addons.com

**KB** support.mscrm-addons.com

Graz, Austria

### USA

**T** +1 404 720 6066

**M** sales@mscrm-addons.com  
support@mscrm-addons.com

**W** www.mscrm-addons.com

**KB** support.mscrm-addons.com

Atlanta, GA

Enhance your **Microsoft Dynamics 365** experience with our addons!