



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



[www.mscrm-addons.com](http://www.mscrm-addons.com)

# PRODUCT CATALOGUE

2024

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## Microsoft Partner

mscrm-addons.com is a trusted Microsoft Partner specializing in solutions for Dynamics 365 and Power Platform. Our suite of customizable add-ons enhances user experience and productivity, helping organizations maximize their Dynamics 365 investment.



# Template Design

Design your templates in Microsoft Word



Our powerful and user-friendly Template Designer makes it easy for anyone to create professional and attractive templates without any programming knowledge. The intuitive drag-and-drop interface is designed to work seamlessly within your familiar Microsoft Word environment.

With the ability to map fields from Microsoft Dataverse, you can easily access and incorporate any data you need for your documents. Plus, it allows for unlimited relationships, looping, sorting, filtering and many more features, making it a complete solution for automating and streamlining your document creation process.

- ✔ Support for **all relationship types** in Microsoft Dynamics 365, with **no restrictions on the number of relationships or levels**. Easy handling of one-to-many and many-to-many relationships, including looping of records, grouping, and calculations within tables.
- ✔ Seamless integration with **e-signature** solutions like DocuSign, AdobeSign and AssureSign, which permit the configuration of e-signature fields directly in the generated templates and initiate e-signature process.
- ✔ Define **conditional content** based on field values in Dynamics 365
- ✔ Creativity is the limit: insert **images, QR codes, charts** to **embedding other documents** into the main document, e.g. product spec-sheets and much more...



# Document Generation

Generate and deliver documents from Dynamics 365 & Model Driven Apps



DocumentsCorePack allows for the efficient creation and delivery of individual or batch documents in a variety of formats directly from the Command Bar.

Utilizing the options available through our DocumentsCorePack dialog can streamline your document generation processes and ease the workload for your users.

The screenshot shows the Dynamics 365 interface with the DocumentsCorePack Dialog open. The dialog has two main sections: 'Select your document template' and 'Define your document process'. The 'Select your document template' section lists various templates, with 'Quote\_Base\_XXL.docx' selected. The 'Define your document process' section has several options checked, including 'Attach document', 'Save to SharePoint', and 'Run Microsoft Flow'. A preview of a document titled 'Mustermann GmbH\_QUO-01022-5918D6' is shown on the right, featuring a table with columns for 'Item', 'Description', 'Quantity', and 'Price'.

Item	Description	Quantity	Price
DocumentsCorePack_XSL (300-400) (user)	Professional document generation and processing in Microsoft Dynamics 365	1	€ 1.200,00
AttachmentExtractor_XSL (300-400) (user)	Extracts data from a PDF file and creates a document in Microsoft Dynamics 365	1	€ 4.000,00
<b>Subtotal</b>			<b>€ 1.200,00</b>
Tax			€ 0,00
Company Fee			€ 0,00
<b>Total</b>			<b>€ 1.200,00</b>



Integrated into the **CommandBar**, our wizard guides the user through the document process.



Deliver your documents by **attaching it to an e-mail**, **printing** (local and cloud), **saving to SharePoint**, or via **Flows** (Power Automate).



**Streamlining of document processes** by combining multiple actions, like "create, send by e-mail and save to SharePoint" **into a single click** for your users.

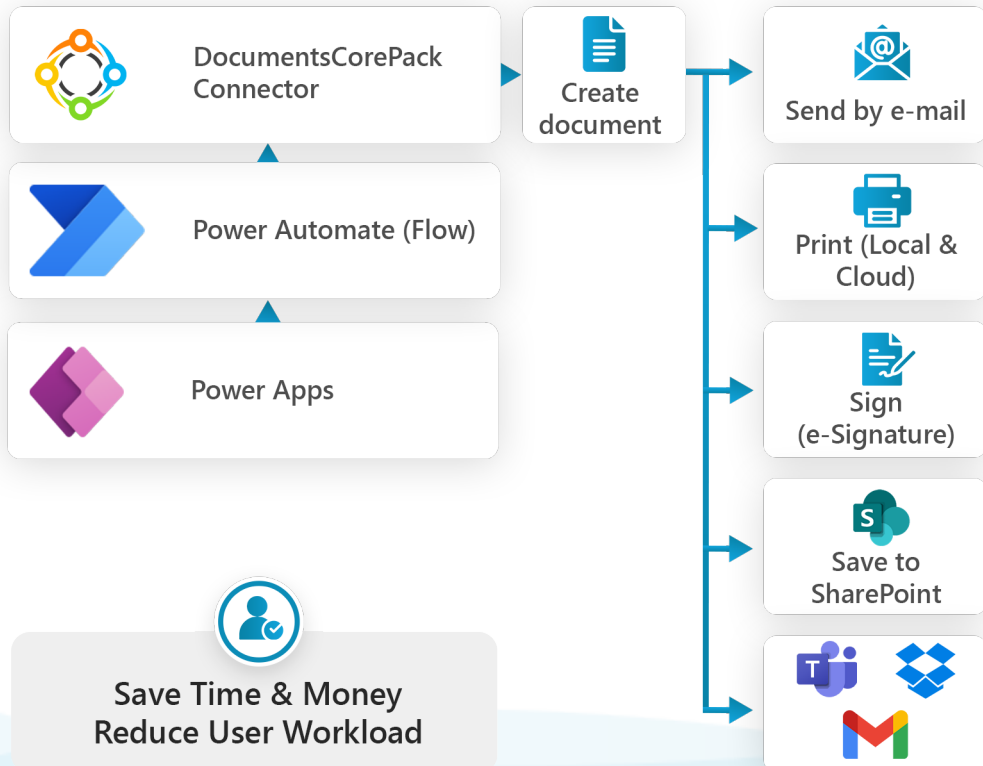
# Document Automation



Automate your documents with the Connector

The DocumentsCorePack Connector enables full document automation by allowing the use of the complete document generation and delivery features within Power Automate (Flow) or classic Dynamics 365 workflows.

- ✔ Our Connector supports **more than 25 actions** that can be integrated into your flow, including: Creating a document, printing, saving to SharePoint, attaching to a note or e-mail, and many more.



# Comparison Chart

DocumentsCorePack vs. Native Dynamics 365



**DocumentsCorePack** **Out-of-the-Box D365**

## Microsoft Word-based Template Designer



Easy to use Word Add-In



XML-based mapping via developer ribbon

## Mapping of Dataverse data:

- Resolve relationships
- Filter results
- Sort results
- Formatting (e.g. date, money values)
- JSON data

Multi-level



limited to 1 level



## 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 according to your business needs with a single click



All document generation & processing options



Only in Sales App Limited to PDF files

## Batch document generation & delivery



## Template management:

- Test templates during the design
- Versioning & History
- Conditional template selection
- Guided provisioning between environments



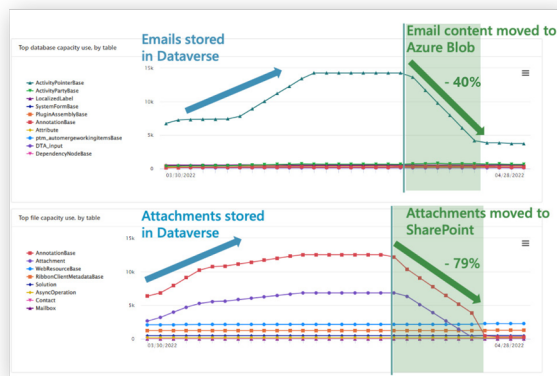
# AttachmentExtractor

Cost saving capacity management for Dynamics 365 & Power Apps



Every company faces a common challenge: - e-mail attachments consume significant amounts of file storage, leading to expensive purchases of Capacity Add-Ons and difficulty in locating attachments.

AttachmentExtractor offers a cost-effective solution by automatically extracting e-mail & note attachments to inexpensive storage platforms like SharePoint or Azure Blob, without affecting the user experience. This saves up to 80% on capacity costs while leaving the user experience unchanged.



After the AttachmentExtractor service is activated, you'll notice a **substantial reduction in your capacity usage**. For instance, a decrease in data capacity by 10.28 GB & 18.50 GB in file capacity can result in annual cost savings of \$5,378.



Avoid expensive  
Capacity Add-Ons



Unchanged  
User Experience

# User-focused Features

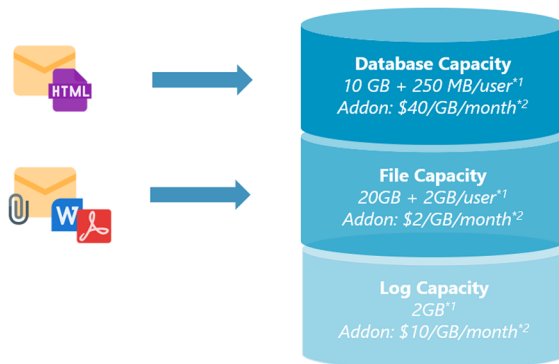


Attachment management tailored to your demand

AttachmentExtractor streamlines the extraction process of large files with its smart file size logic, ensuring swift extraction and instant capacity optimization.

Our solution offers the flexibility to configure preferences for e-mail handling, allowing you to specify particular tables (Whitelist) to focus on or exclude from the service's operations. You can activate the service at specific times, such as extracting attachments exclusively during weekends or limiting extraction to the time frame between e.g. midnight and 5 am.

These versatile features empower users to efficiently manage their e-mail attachments while tailoring the tool to their specific needs and preferences.



- ✓ When users access their e-mails or notes, they won't notice any changes. AttachmentExtractor operates **in the background**, handling the extraction process seamlessly.
- ✓ Completely **integrated with SharePoint**, our tool automatically extracts attachments and notes from e-mails and saves them to the correct document location. If the location does not exist, it will create it for you.

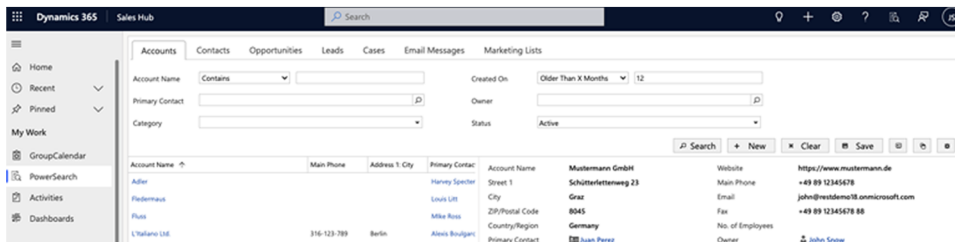
# PowerSearch

The power of advanced search in a user-friendly package for Dynamics 365 & Power Apps



Streamline your Dynamics 365 search experience by combining the power of Advanced Find's robust capabilities while still enjoying the simplicity of the basic search functionality.

With the ability to save common search queries and search across multiple fields, you can significantly reduce the time spent on searching. Additionally, you can take advantage of native Dynamics 365 Grid functionality to perform actions like Bulk-Edit or Export to Excel on your search results, enhancing your overall search experience.



PowerSearch combines the **simplicity** of Dynamics 365 search with the **advanced features** of an Advanced Find.



By predefining common search queries, you can save valuable time while **reducing the clicks** needed to find the requested data.



You can **view result records directly** without having to open them individually. These previews can be customized to meet your specific requirements.



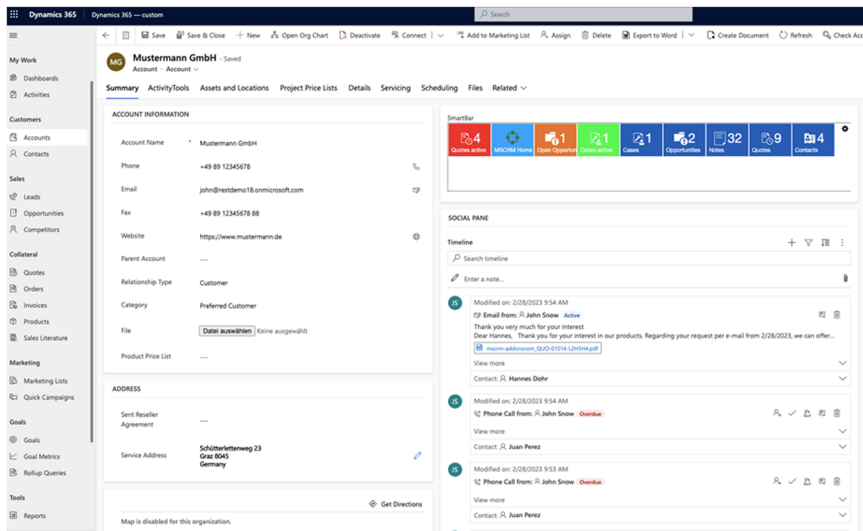
# SmartBar

Personalized navigation that fits your unique needs in Dynamics 365 & Power Apps



We created SmartBar to address the challenge of navigating between related records, which can often be tiring.

SmartBar enables users to easily navigate between related Dynamics 365 records and can be personalized to meet each user's unique Dynamics 365 needs. This tool supports both standard and custom tables.



**Easy access** to your most important views like "Open Cases", "Overdue invoices", or "Important opportunities".



**Seamless data management with just one click!** Accessing related records in a Single Point of Information has never been easier.

# Partner Program



Working with Partners is the key to success!

Our objective is to operate our business in a manner that not only fulfills but surpasses the expectations of both our customers and business partners. We are fully dedicated to assisting our business partners at every stage through a specialized partner program that ensures long-term success in their ventures.

Our partners play a vital role in our distribution network. They seamlessly incorporate our Add-Ons into their comprehensive solutions, allowing clients worldwide to access our products easily in their local markets. We highly value the collaborative partnership with our resellers and are grateful for their commitment.

- ✔ Embark on an exhilarating journey with our **expert-guided onboarding program**
- ✔ Unleash your potential through **strategic planning** and unwavering **ongoing support**
- ✔ Access to **training resources** and **professional materials**
- ✔ Enjoy exclusive access to **licenses for all our solutions**
- ✔ Elevate your success with recurring **reseller margins** that soar **as high as 30%**

# References

What our customers say about our solutions.



## ■ GEBERIT



“I am absolutely thrilled about the amazing capabilities of DocumentsCorePack that have made our document-heavy business processes a breeze to manage. What's more, the outstanding support provided by the team at mscrm-addons has been truly exceptional, and I haven't come across any other service provider that offers such top-notch assistance. Overall, my experience with DocumentsCorePack has been nothing short of remarkable, and I couldn't be happier with the results it has delivered.”

**Ferdinand von Gaisberg**, Senior IT Application Analyst



“I think the most compelling statement I can make is that in 15+ years I have NEVER had a bad experience with anyone from mscrm-addons.com. Yes, we've had issues that took a while to resolve (mostly due to MS product changes) but they worked hand in hand with us to ensure our (mutual) clients achieved their desired outcomes. They are my bar for ISV relationships.”

**Michael Hauk**, Chief People & Experience Officer

# References



What our customers say about our solutions.



“The smart tools mscrm-addons.com has developed have taken our experience with Microsoft Dynamics to the next level. The tools are well-developed, well-supported, and the team is wonderful to work with. Everyone I’ve ever communicated with on the mscrm-addons.com team, from support to sales to execs, have been friendly, knowledgeable and helpful.”

**Abby Torres**, Director of IT



“We have been a partner for 8 years with mscrm-addons. We have never considered another third party vendors than mscrm-addons.com for the products and services we use from their product portfolio. That is a statement by itself. Their support is so impressive and good. That is a keyfactor to us along with that we are taken seriously if we have suggestions for new functionality, improvements or problems. The products are also very well documented. My warmest recommendations.”

**Stig Karlsen**, Solution Architect



# Contact



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# Notes



A large, light gray rounded rectangle containing ten horizontal lines for writing notes.



**14-Days Free Trial**  
For all our solutions


- No payment required
- Full support included

# UNLOCK THE FULL POTENTIAL OF DYNAMICS 365 & POWER PLATFORM


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