DocumentsCorePack
for Microsoft Dynamics CRM

AssureSign, Send from Outlook
&
Scheduled Reports

DocumentsCorePack

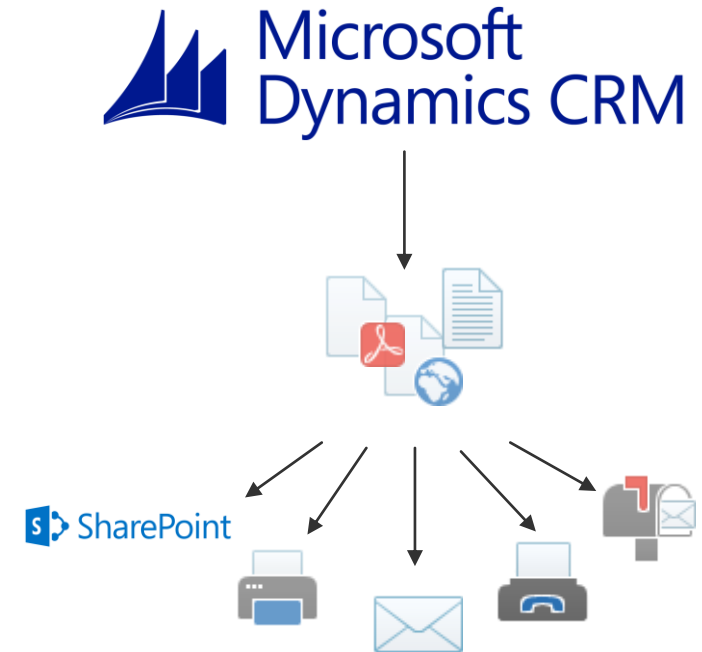## Unified document solution: Creation – Processing - Automation

Goal: simplify and streamline document-related business operations in Microsoft Dynamics CRM

- <u>Professional document generation</u>
    - MS Word Based Templates, no SSRS needed
    - All common file-types supported
    - Powerful CRM connector: Custom entities & attributes, multi-relation-support, calculations, QR-codes, dynamic pictures…

- <u>Processing Capabilities</u>
    - Mailing (generate attachments and email content)
    - eSignature-integration (DocuSign, AssureSign)
    - Sharepoint integratoin
    - Printing
    - Attach as note
    - Attach to email or letter
    - …

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Goal: Streamline and unifiy process of document generation and e-Signing

- <u>Template Design:</u>
    - Pre-define placeholders for e-Signatures
    - Pre-define properties and questions

- <u>Trigger e-Sign processes</u>
    - Start an on-demand process via the DocumentsCorePack dialog
    - Full Automation via workflows

- <u>Features</u>:
    - Ability to track the signing process within CRM
    - Signed document delivered back as note
    - Setup Documentation can be found on our blog (Takes about 30 minutes to complete)

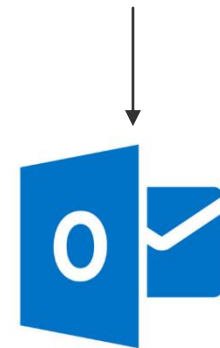https://www.assuresign.com/

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Goal: Use the DocumentsCorePack Dialog to Create, Attach and Send documents using the local email Client

- Why use this Capability?
    - Users work with Outlook client rather than CRM web-client
    - Bypass Limitations of CRM Email templates
        - Generation of attachment
        - Generation of email content (based on MS Word templates)
    - Access to Outlook features such as signatures, Contact List etc.

- How it works
    - New Filetype (*.eml)
    - Direct download from DocumentsCorePack Client and opened with local email Client
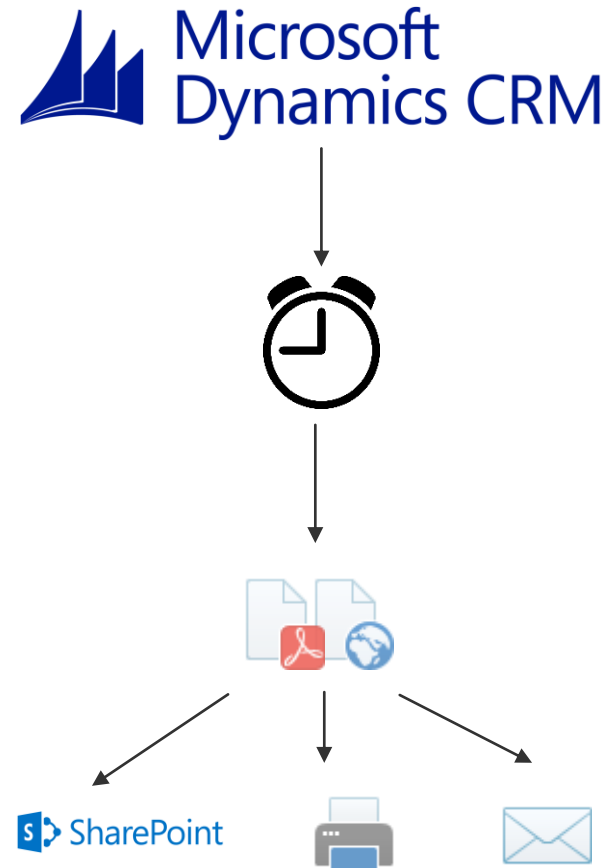
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Goal: Easy scheduling of workflow processes

- The mscrm-addons.com scheduler
    - Easy 3-step
        - Records to fire workflow on (Advanced Find)
        - Schedule: Daily, Monthly, Weekly, Yearly
        - Workflow to execute (Supports all DCP –features)

- Examples:
    - Send out an email to overdue invoices.
    - Get a daily printout on new Opportunities
    - Send Welcome package to new leads.

    - Can be used to schedule non DCP workflows as well.

Thank You

Feel free to join our upcoming Webinars!
http://www.mscrm-addons.com/Support/Webinars.aspx

Resources:

- You can find us on the web at http://www.mscrm-addons.com

- Help-Center (Live-Chat, Support): http://www.mscrm-addons.com/Support.aspx

- Don't forget we have an awesome blog at http://blogs.mscrm-addons.com/, you'll find it to be a helpful resource!

Contact:

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