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DocumentsCorePack for Dynamics 365 Marketing

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1. Overview

1.1. General Information

The DocumentsCorePack for Dynamics 365 Marketing solution allows customers to utilize the document generation and processing options of DocumentsCorePack within Customer Journeys in Dynamics 365 Marketing.

The solution brings in a custom "Create Document" operation that can be used inside custom channels within a customer journey.

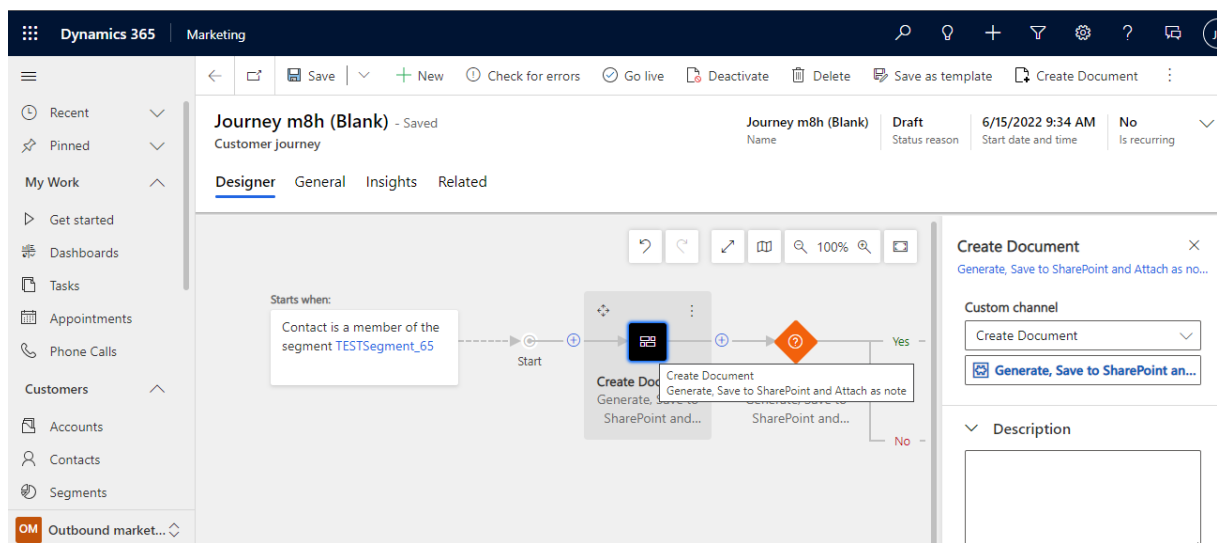


Figure 1: Dynamics 365 - Marketing Customer Journey

Once a customer hits a tile, a document that incorporates fields from the customer (contact or lead) is generated.

1.2. Supported document operations

Next to the definition of the document to be generated, it is also possible to configure several options to save and process the document.

1.2.1. Per "customer" within the journey

The following options can be configured to be executed once a customer (lead or contact) hits the tile:

- **Save to SharePoint:** Stores a copy of the generated document in the SharePoint folder of the record.
- **Attach as Note:** Creates a new annotation on the record with a copy of the generated document attached.
- **Print:** Sends the document to a printer ([How to configure Printers for DocumentscorePack](#)). Next to the definition of the printer to be used, the number of copies required can be specified.
- **Create SharePoint location:** If not yet existing, a new document location will be created according to the definition given by the Dynamics 365 SharePoint integration. Next to creating a document location itself, it is also possible to create subfolder.

Processing Options		
Save to Sharepoint	Yes	Attach as Note
		Yes
Printer	---	Print Copies

Figure 2: Options per "customer"

1.2.2. For Batches

Within a custom tile, it is possible to wait for a certain number of records hitting the step before the document is processed. Thus, documents are created & processed in batch rather than individually (see Figure 2).

In this case, all documents generated are concatenated into one document before being processed.

The following options can be configured to be executed for a batch of records (contacts or leads) within a journey:

- **Print:** Sends the document package to a printer ([How to configure Printers for DocumentscorePack](#)). Next to the definition of the printer to be used, the number of copies required can be specified.
- **Store to global SharePoint folder:** Stores a copy of the generated document into the SharePoint folder specified.
- **Store to global Azure Blob:** Stores a copy of the generated document into the Azure Blob specified.

Batch Settings			
Sort by field	---	Sort Direction	Ascending
Batch Size	---	Batch Delay(hours)	---

Figure 3: Batch Settings

1.3. Installation

In order to use DocumentsCorePack inside a custom tile you will have to download and import the following solution into your Dynamics 365 for Marketing tenant:

[Download](#)

2. Configuration Options

2.1. Adding the "Create document" tile

After adding a custom channel to your journey, you can select the "Create document" option:

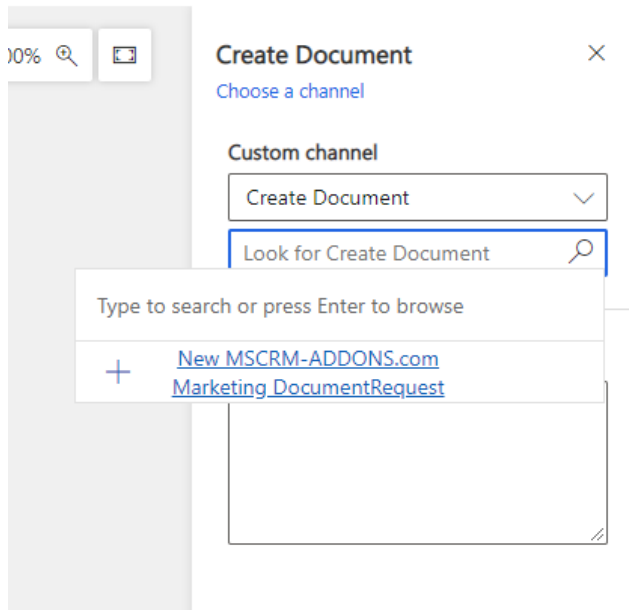


Figure 4: Create document - option

Once Selected you will have to create a "New MSCRM-ADDONS.com Marketing Document Request" record.

2.2. The Document Request record

This record allows to define both, the document to be generated as well as how the document should be saved & processed.

2.2.1. General & Document Settings

- **Name:** Provide a name for the document process you are defining. It is recommended to define a proper name that states what happens in this step.
- **Action:** Choose between "Create document" for creating and processing a new document or "Create SharePoint Folder" if you only need to create document locations / folders on SharePoint without the need to create a document
- **Template:** Choose the template you want to use. **Note:** the lookup will only provide templates created for either the contact or lead table.
- **File Type:** Choose between ".pdf" or ".docx" as the output file type.

Create Document, Save to SharePoint and Attach as Note - Saved
MSCRM-ADDONS.com Marketing DocumentRequest

General Advanced Related

Name	* Create Document, Save to SharePoint and Attach as Note
Action	* CreateDocument

Document Settings

Template	 Contact_Test.docx
File Type	* pdf

Figure 5: Example of General and Document settings

2.2.2. Processing Settings

This section allows to define how a document should be processed for records hitting the tile in your customer journey.

Note: Some settings only apply if your tile is configured to run as a batch

- **Save to SharePoint:** Define whether you want copy of the generated document in the document location of the record.
- **Attach as Note:** Define if you want to have a copy of the generated document attached as a note to the respective record.
- **Printer:** Once a printer is chosen, the document will automatically be sent to the printer. If a batch is configured, only the final, concatenated document is printed.
 - **Print Copies:** Define how many copies of the document you want to print.
- **SharePoint/Blobstorage URL:** In this section you can define a static location to store your document to. The location can either be a SharePoint location or an Azure Blob. If a batch is configured, only the final, concatenated document is stored to the respective location.
 - **Document Location:** this lookup allows to choose a document location out of your system other than specifying a hardcoded URL. **Note:** if configured, the content of the "SharePoint/Blobstorage URL" will be overwritten. It is not possible to do both, save to SharePoint **AND** save to an Azure Blob in one tile.

Create Document, Save to SharePoint and Attach as Note - Saved
MSCRM-ADDONS.com Marketing DocumentRequest

General Advanced Related

Processing Options			
Save to Sharepoint	Yes	Attach as Note	Yes
Printer	---	Print Copies	---
Sharepoint/Blobstorage URL			
Document Location			

Figure 6: Example of processing settings. In this case, the generate document is attached as a note to the record as well as stored in the respective location on SharePoint

2.2.3. Batch Settings

Within this section you can configure your batch. As stated above this will lead to the documents being generated, concatenated into a single document, and processed in a batch.

- **Sort by field:** specify a column to sort the records within a batch.
 - Sort direction: Ascending or Descending
- **Batch Size:** Define how many records should be processed in a batch. The default value for the batch size is 1 if don't specify it.
- **Batch Delay:** Define how long the journey should wait before processing a batch.

Example: with the following settings the journey will wait for 25 records hitting the tile before triggering the document generation. Once the Batch size is met, the document generation will start immediately. In addition, it will start after one hour independent on the number of records in the batch. This is to avoid long wait times for certain records.

Batch Settings			
Sort by field	lastname	Sort Direction	Ascending
Batch Size	25	Batch Delay(hours)	1

Figure 7: Batch Settings

3. Error Handling

3.1. The “Document Created” and “Document Failed” keyword

Once the “Create document” tile is executed it will hold information on the status of the document process. To be more specific, it will hold the following two keywords

- **“Document Created”**: If the document was generated and processed successfully
- **“Document Failed”**: If the document process failed

That being said, those keywords can be added to your customer journey to act accordingly.

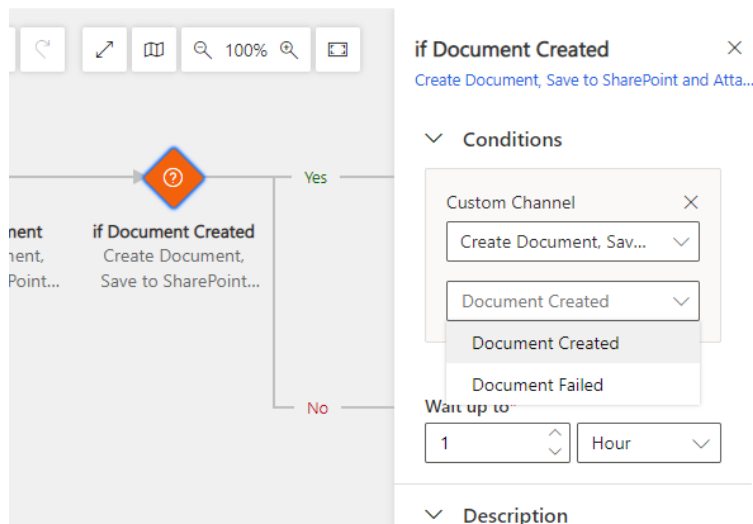


Figure 8: Using the Keyword provided by the “Create document”-action in an if-statement

Example: In the following journey we are creating an appointment to resolve / investigate the document issue but continue with a phone call to the customer if it was successful.

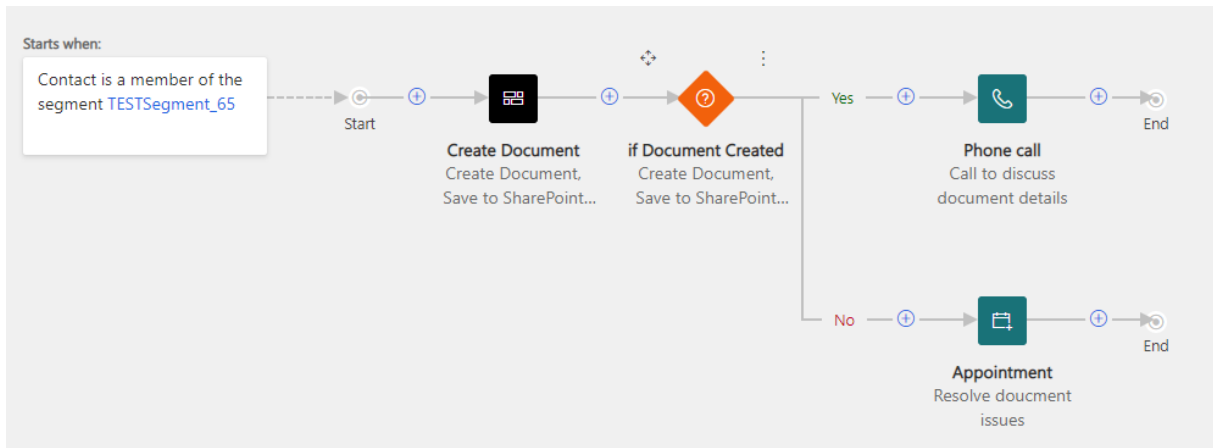


Figure 9: Example of a customer journey including error handling upon non-successful document operation

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5. Contact

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

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