

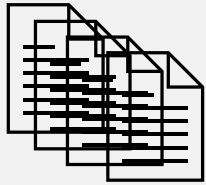


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Batch document jobs with DocumentsCorePack: Options, Best practices and Performance

Clint Higley, Michael Dohr

Bulk Document Jobs



Bulk Document Jobs

Creating & Processing many documents at once

Examples:

- Daily Service Reports
- Monthly/Annual Invoices
- Personalized Christmas Greetings
- ...



Speed and Usability

Questions to answer:

- How fast do i require the jobs be accomplished?
- How will this effect my users?
 - Dynamics 365 usability
 - Avoiding Processing Bottlenecks



DocumentsCorePack batch options

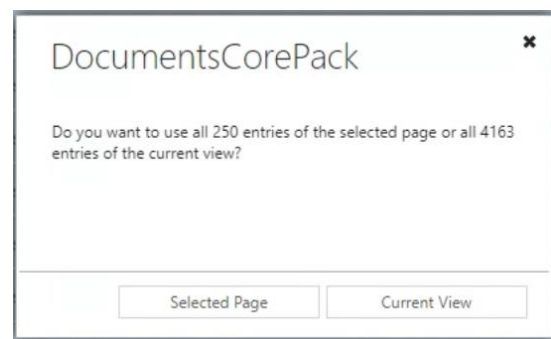
- DocumentsCorePack-Dialog
- Workflow (outdated)
- Power Automate
 - [DCP Connector](#)
 - Dataverse Connector
- [Load-Balancing](#)



Batch document generation via the dialog

Use cases: User initiated document jobs from a view for smaller data-sets

- Accounting: Send today's invoices or quotes
- Sales: Send report to key-accounts

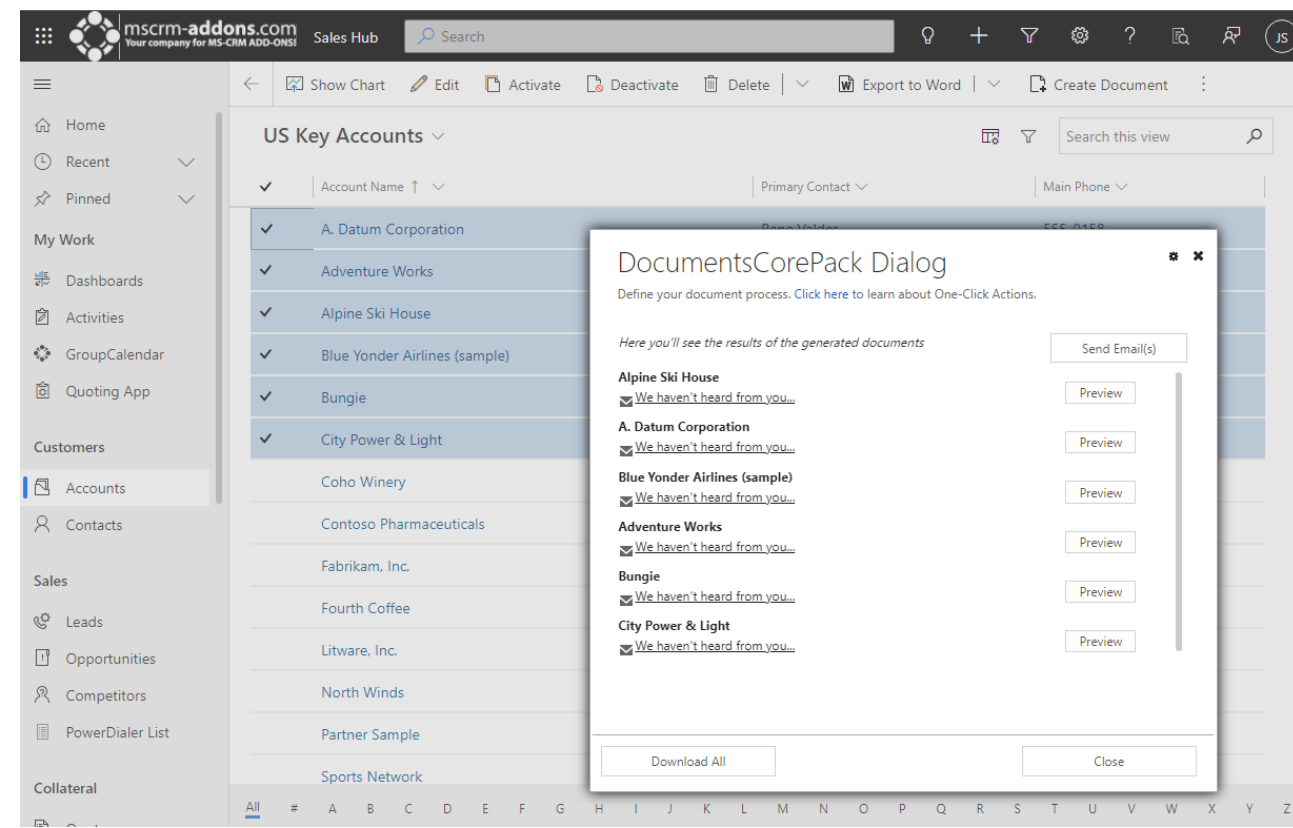


Batch options:

- Selected Page or Current View
- Edit Template (for this run)
- Create Single Document
- All Processing options supported
- "Download All" created documents

Good to know: The dialog has priority over flows to avoid user frustration

- Single service: documents pushed to the top of queue
- Load Balancing: One service reserved for single & batch requests





Batch document generation via Power Automate

Use cases: Automated document jobs from a query for large data-sets

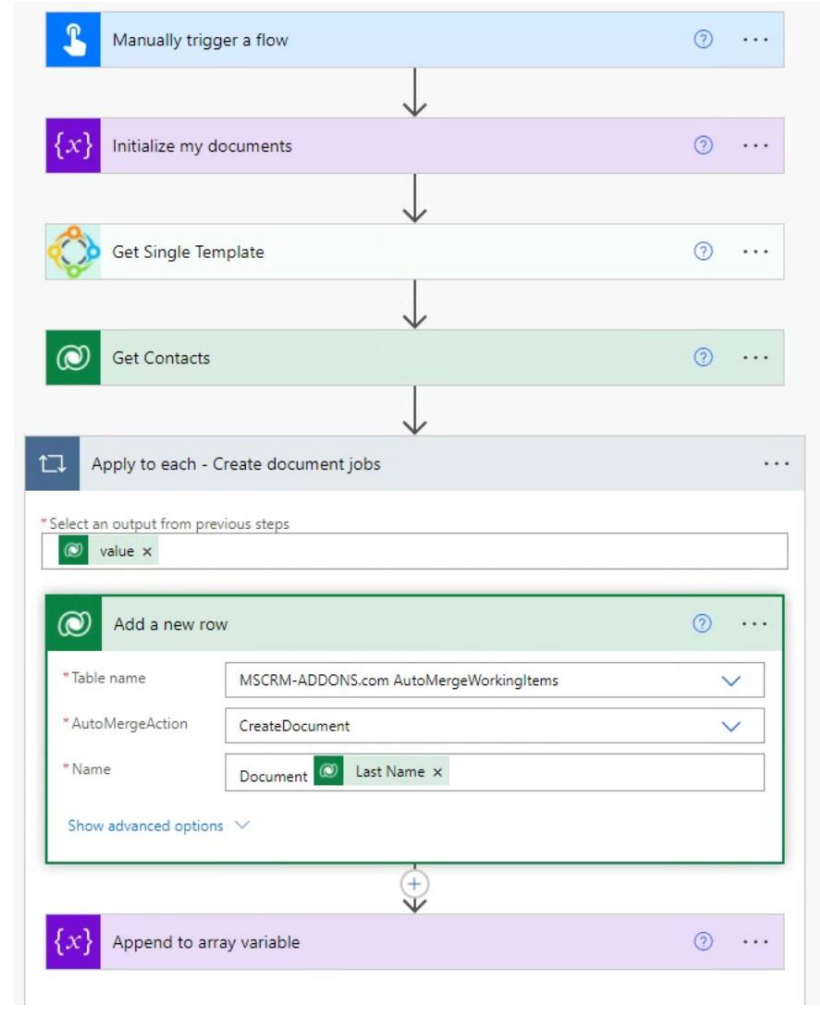
- Monthly service reports
- Personalized information (info on product updates or T&C)

Best practice:

- Load-Balancing recommended
- Generate document jobs async and fast.
- **Keep number of requests low:** combine generation & processing

Batch Options:

- DocumentsCorePack Connector:
 - User-friendly & intuitive setup
 - Allows Generation, save to SharePoint & Print in one step
- Dataverse Connector
 - Supports most processing options in a single step.
 - Faster: No delay due to Service Protection API limit.



Recommendation: For Emailing of documents & very high volumes (10000+ records) the Dataverse connector is the better choice. For smaller batches, both options are ok with a neglectable difference in performance.



Performance: What's Possible?

Key performance factors:

How large is the document?

Try to keep documents small.

How is the document processed?

Save to SharePoint: 2-3s, Attach to email: ~0.5s

How is the workload of the service? **Load Balancing**

Performance limits:

- **# of services:** *Basic load balancing close to best performance.*
- **Service protection API limit:** *Maximum of 6000 requests in 5 minutes. Dominant for very high volumes.*

Information: All Tests are executed with a „common“ formatted 1-page template including a logo and 10 field mapped from DataVerse.

File size: 70 Kb

Use Case	1 Service	Load-Balanced 3 Services	Load-Balanced 6 Services
Generate 1000 documents	31 minutes	10 minutes	6 minutes
Generate 1000 documents & save them to SharePoint	55 minutes	19 minutes	10 minutes
Generate 1000 documents & send them by Email	49 minutes	16 minutes	9 minutes

Demo:

- Generate a batch of documents from the dialog
- Setup of a high – performing document generation Flow
- Check performance of our webinar Flow

Helpful resources:

- Information: [DocumentsCorePack: Performance benchmark, limitations & scalability](#)
- Information: [DocumentsCorePack: Load Balancing Services](#)
- Step-by-Step: [Bulk Document Generation with PowerAutomate and DocumentsCorePack](#)

Thank You, & Stay Safe!

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US: +1 404 720 6066
Europe: +43 (316) 680 880

ussales@mscrm-addons.com
sales@mscrm-addons.com