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Document Automation in Microsoft Flow

using

DocumentsCorePack

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Demo

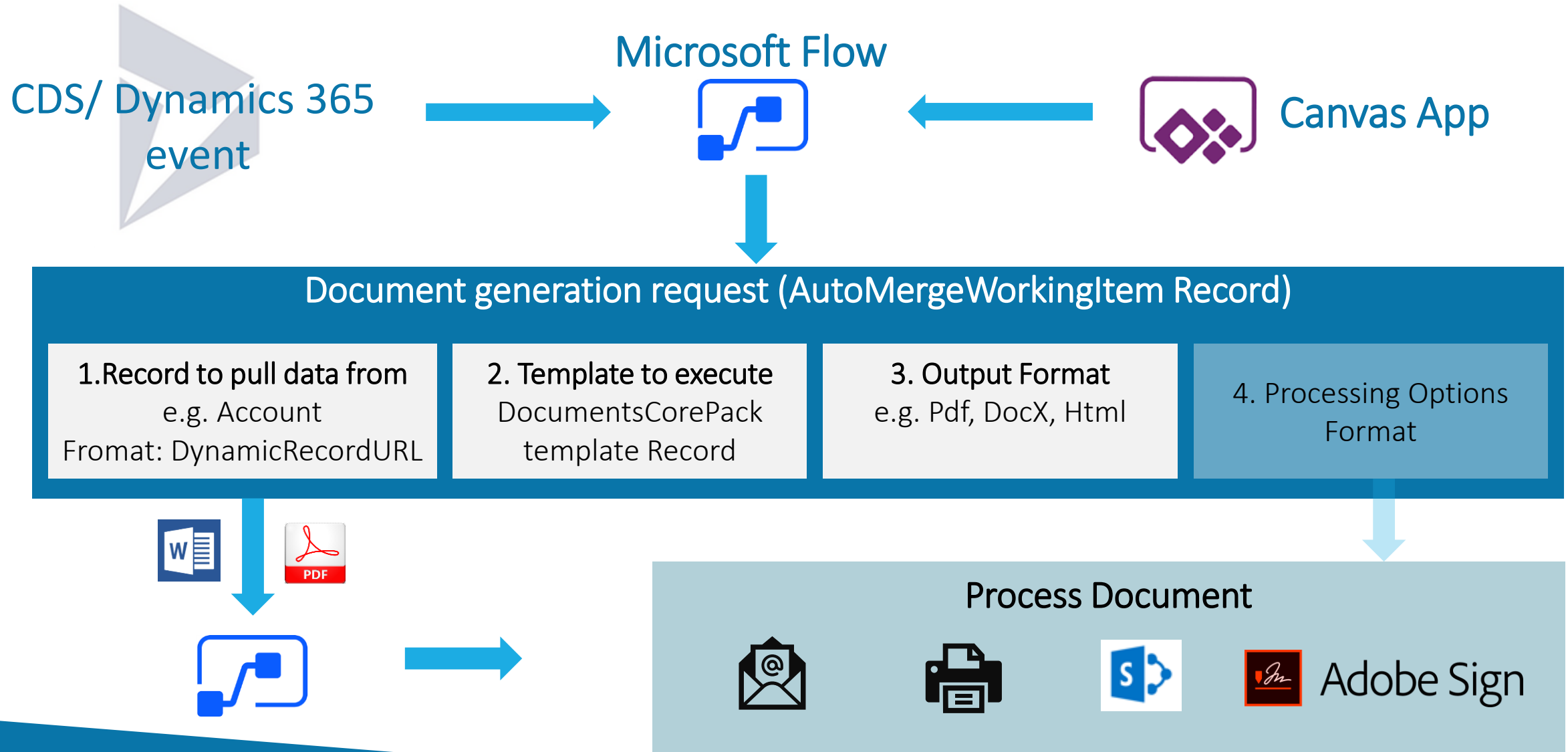
Requirement: A quote document should be sent to the customer and saved to SharePoint in PDF format upon activation

Step – by – Step Walkthrough:

- Create Flow that triggers upon quote activation
- Define Email message
- Load Template to Execute
- Set up a document generation request
 - Generate PDF
 - Save to SharePoint
 - Attach to Email
- Review results

[DEMO]

Utilize DocumentsCorePack in Microsoft Flow



Document Generation Request Example

Create a AutoMergeWorkingItem Record

* Environment: mscrm-addons.com Corportaion (usdemo18)

* Entity Name: MSCRM-ADDONS.com AutoMergeWorkingItems

* AutoMergeAction Value: CreateDocument

* Name: Create, Send and Save to SharePoint

Show advanced options

PrimaryRecordUrl: <https://usdemo18.crm.dynamics.com:443/main.aspx?etc=1084&id=664468420&histKey=664468420&newWindow=true&pagetype=entityrecord>

SaveAs Value: pdf

TemplateToExecute: DocumentsCor...

Create Record:

- MSCRM-ADDONS.com AutoMergeWorkingItem

AutoMergeAction:

- **Create Document**
- Processing Only (e.g. Attach to Note)

Unique URL of the starting record the data is pulled from. QuoteID is dynamic.

Output FileType (PDF, DocX, HTML,..)

Reference to DocumentsCorePack Template record (retrieved in Flow before)

Thank You

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- Help-Center (Live-Chat, Support): <http://www.msrm-addons.com/Support.aspx>
- Don't forget we have an awesome blog at <http://www.msrm-addons.com/Blog>, you'll find it to be a helpful resource!

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