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**Generating Workbooks and Document Packages**  
in  
DocumentsCorePack for Dynamics 365

# The case for MultiPart Documents

## Requirement – Solution – Use Cases



### Requirement

Need to generate more than a single document at a time in a certain business process.

#### Problems:

- Redundant Tasks
- Manual consolidation (Concatenation)
- No Standardization & User Errors



### Solution

Allow for an easy way to define workbooks or packages consisting of various individual elements.

#### Goal:

- Provide **highly customizable** configuration of document packages.
- Standardize and simplify business processes & Avoid user errors



### Popular Use Cases


- Proposal consisting of
  - Cover Letter
  - Company profile
  - Quote
  - Reference Projects
  - Terms & Conditions
  - ...
- Welcome Packages
- Legal Forms

### Helpful Links

Documentation: [DocumentsCorePack Documentation Library](#)  
Start a trial: [DocumentsCorePack on Microsoft AppSource](#)

# Designing Workbooks & Document packages

## The Multipart-Document Designer



### Configuration Options

Sources:

- DocumentsCorePack Templates
- SharePoint
- Note

UI-Options:

- **Optional:** User defines if document should be used
- **Selection:** Allow selection from predefined list
- **Conditions:** Control visibility by field-values (language, deal size)
- **Visibility:** Define if users should see/not see certain options

Template Selection Use Multi Part

| Label                                    | Type     | Template / Note / SP URL | Description     | Condition | Optional                            | Show                                |
|--|----------|--------------------------|-----------------|-----------|-------------------------------------|-------------------------------------|
| <input type="checkbox"/> Cover Letter    | Template | Cover Page.docx          | Cover Letter    | +         | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Company Profile | Template | Company Profile1.docx    | Company Profile | +         | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Resume          | Template | Resume.docx              | Resume Black    | +         | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| <input type="checkbox"/>                 | Template | Resume Aqua.docx         | Resume Aqua     |           |                                     |                                     |




DocumentsCorePack Dialog





Generates a document based on the records data. [Click here to see how to create templates](#)

|   |                      |
|---|----------------------|
| <input type="checkbox"/> Cover Letter               | Cover Letter         |
| <input checked="" type="checkbox"/> Company Profile | Company Profile      |
| <input type="checkbox"/> Resume                     | Resume Black         |
| <input type="checkbox"/> Quote                      | Quote - long version |
| <input type="checkbox"/> Terms and Conditions       | Terms and Conditions |
| <input checked="" type="checkbox"/> Appendix        | Appendix A           |

Next Cancel



### Proposal

-  Cover Letter
-  Company Profile
-  Quote - long
-  Appendix A

# Demo & Roadmap

## Step-by-Step Live Demo

Part 1) Overview of the Multipart-Designer

Part 2) Step-By-Step Configuration of a Welcome Package

Part 2) Popular examples

### Availability:

- On-Premise: DocumentsCorePack v2017.144

<http://www.msrm-addons.com/Downloads/Download-DocumentsCorePack-For-Dynamics365>

- Online: Update Available to v2017.143 or higher on all Instances

[http://www.msrm-](http://www.msrm-addons.com/Portals/0/MSCRM2015/AM/DocumentsCorePack_AttachmentExtractor_Online_Doku_english_v0.1_June_2017.pdf)

[addons.com/Portals/0/MSCRM2015/AM/DocumentsCorePack\\_AttachmentExtractor\\_Online\\_Doku\\_english\\_v0.1\\_June\\_2017.pdf](http://www.msrm-addons.com/Portals/0/MSCRM2015/AM/DocumentsCorePack_AttachmentExtractor_Online_Doku_english_v0.1_June_2017.pdf)

### Roadmap:

- Multiselect option sets (select more than one option in picklists)
- Enable users to re-order items
- Visibility Rules

# Thank you!

## Support & Contact

- 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://www.mscrm-addons.com/Blog>, you'll find it to be a helpful resource!

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