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Your company for MS-CRM ADD-ONS!

Generate documents via DocumentsCorePack
using
Microsoft Flow and PowerApps

Business Application Platform + DocumentsCorePack



Dynamics 365
XRM Platform

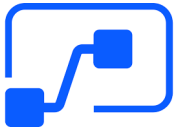


DocumentsCorePack



Power Platform

Common Data Service / XRM Platform
+
Data Connectors

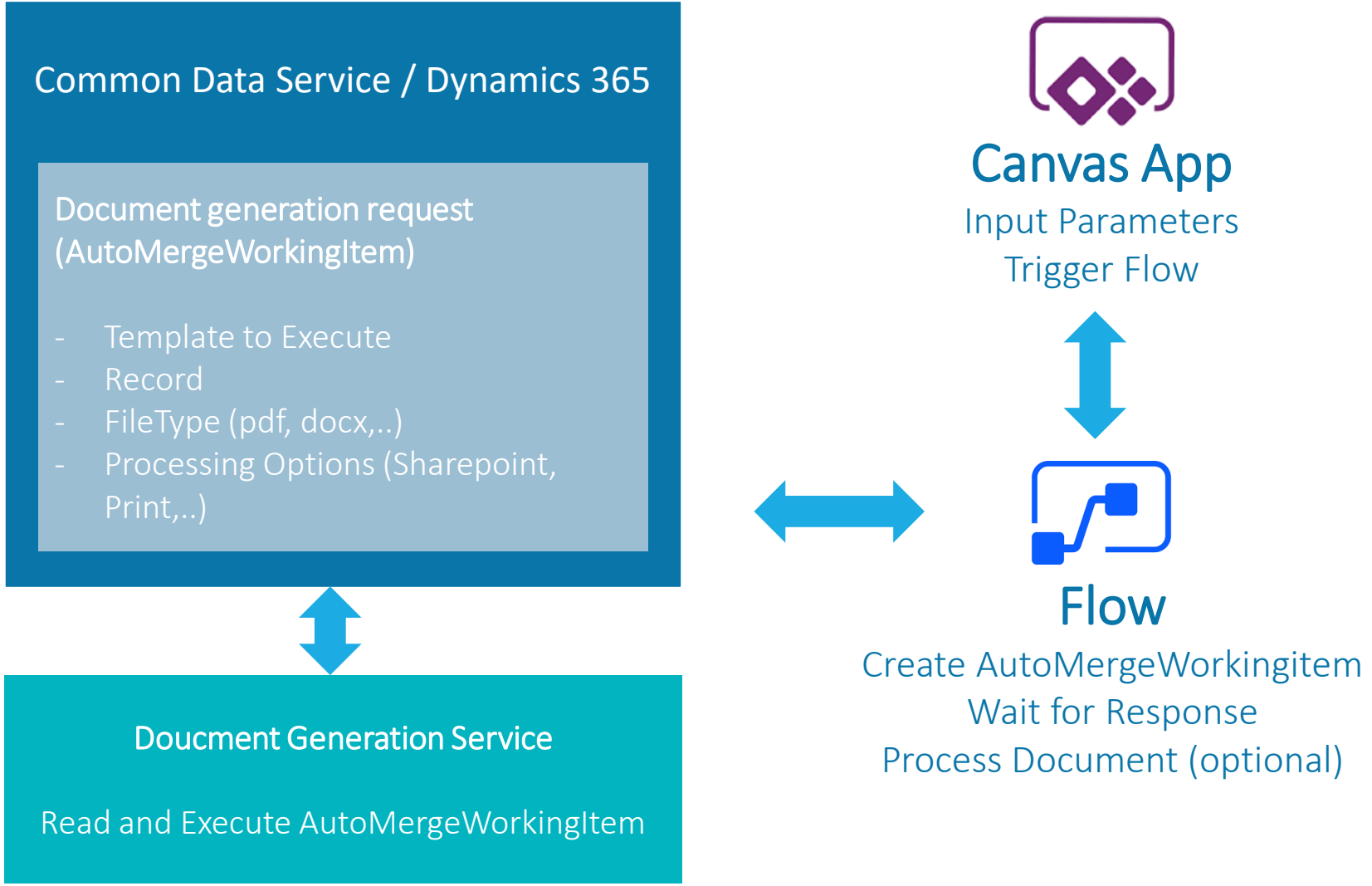


Flow : Automate
Automate Processes and Tasks



PowerApps : Act
Custom Business Applications

Document Generation Requests



How to setup the AutoMergeWorkingItem



Required:

- AutoMergeAction: 956,670,000
- FileType: pdf, docx
- Template
- PrimaryRecordURL:
<https://usdemo18.crm.dynamics.com/main.aspx?etc=1084&id={RecordGUID}&pagetype=entityrecord>

Optional:

Processing options within Dynamics 365

- [Print](#)
- [Save to SharePoint](#)
- [Save as Note](#)
- ...

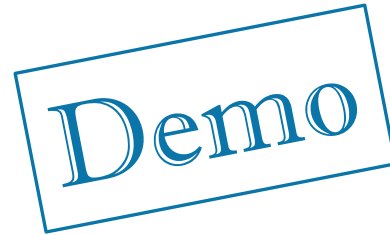
OR PROCESS IN FLOW!

CreatePDFWorkingItem	
* Organization Name	mscrm-addons.com Corportaion
* Entity Name	MSCRM-ADDONS.com AutoMergeWorkingItems
* AutoMergeAction	956670000
* Name	CreatePDFdocument
AutoMergeAction Label	CreateDocument
Category	
CombineType	Combine Type
Convert to PDF	No
CreatedDocument	CreatedDocument
CreatedDocument	
CreateSharePointFolder	
CRM Document Location	
CRM Document Location	
Delete Sharepoint File	No
Delete Temp for CreateDocument-step	No
Direction	
Direction Label	Sharepoint to Entity

Demo & Roadmap

Demo:

- Demo: Trigger document generation in Canvas App
- Scenario 1: Fire & Forget
 - Step-by-Step Canvas App Walkthrough
 - Step-by-Step Flow Walkthrough
- Scenario 2: Fire & Forget
 - Step-by-Step Canvas App Walkthrough
 - Step-by-Step Flow Walkthrough



Upcoming:

- Document Generation from Dynamics Portals
- Blog-Series with How-Tos and Examples
- Document generation based on CDS

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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