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New Features in the DocumentsCorePack Dialog for Dynamics 365

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The DocumentsCorePack Dialog

Create and Process documents from the CommandBar

Steps:

1. Template selection
2. Processing Settings
3. Review & Edit

Single & Batch processes supported

The screenshot shows the Dynamics 365 Sales Hub interface. A yellow box highlights the 'Create Document' button in the CommandBar. A blue arrow points from this button to the 'DocumentsCorePack Dialog' window. The dialog has two tabs: 'Select your document template' and 'Define your document process'. The 'Select your document template' tab shows a list of templates, with 'Quote_Base_EN.docx' selected. The 'Define your document process' tab shows settings for file type (pdf), attachment (checked), email sender (Current User), recipient (Select options), email template (No selection), save to SharePoint (checked), and run Microsoft Flow (checked). A 'Next' button is at the bottom. To the right, a 'Preview' window shows a quote for 'Mustermann GmbH' with a table of items and a total of €13,260.00.

Quote #QUO-01022-S9J8D6				
	DocumentsCorePack XXL (300-600 Users) Professional document generation and processing in Microsoft Dynamics 365!	1	€8,280.00	€ 8 280,00
	AttachmentExtractor XXL (300-600 Users) Database space is expensive - this is why we developed AttachmentExtractor. Save precious database space in Dynamics 365 by extracting attachments from your Dynamics 365 environment to an alternative storage.	1	€4,980.00	€ 4 980,00
Subtotal:				€ 13 260,00
Tax:				€ 0,00
Discount (%):				€ 0,00
Total:				€ 13 260,00

This quote is valid for 30 days from today.

After receipt of payment in full we will send you the permanent license key for the software by e-mail.

Account Name: PTM EDV-Systeme GmbH
Bank: Steiermärkische Bank und Sparkassen AG
Address: Sparkassenplatz 4, 8010 Graz, Austria

One-Click-Actions: Preconfigured document processes



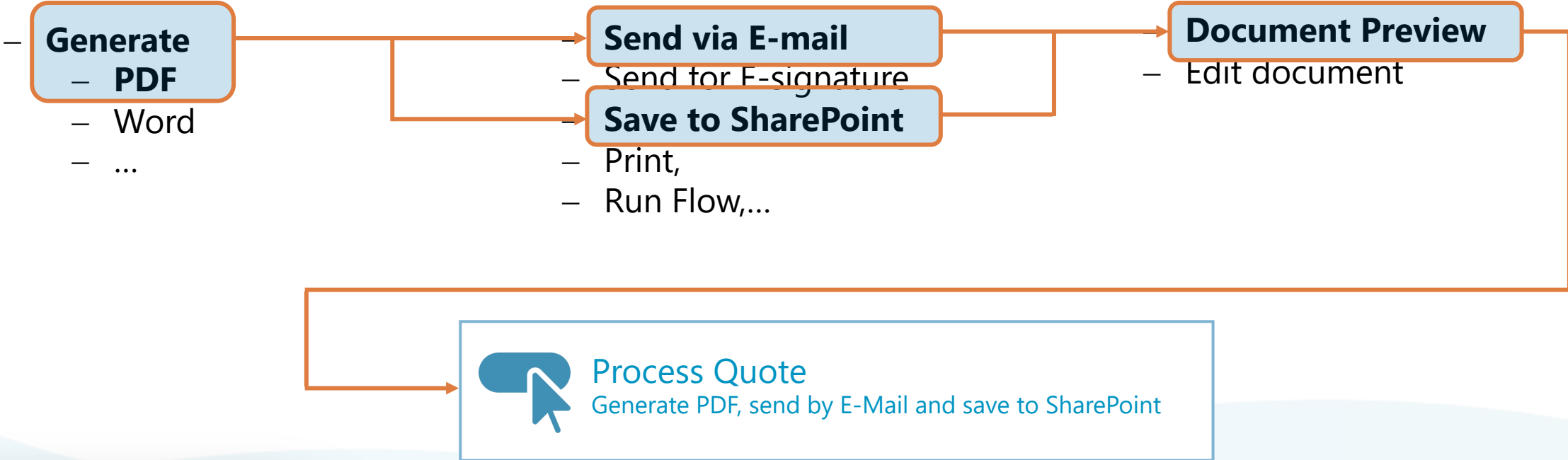
1. Generate



2. Process & Deliver



3. Review



Multipart Document: Create document packages

Sources

- DocumentsCorePack templates
- Notes inside Dynamics 365
- Files located on SharePoint
- **Dynamic Documents**

Features:

- Conditional inclusion
- User defined inclusion
- Continuous numbering, formatting...

Example: Proposal

W Cover Letter

W Company Intro

PDF Spec-Sheet

PDF Reference Project 1

PDF Reference Project 2

PDF CV of Project Manager

W Quote

DocumentsCorePack Dialog

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

Cover letter

Company profile

Proposal

Terms and Conditions

Appendix

Cover letter

Company profile

Proposal long version

EN

EN

DE

FR

SP

Next

Cancel

Dynamic Documents

Create and include documents from related & unrelated records

Example: Proposal

- Cover Letter
- Company Intro
- Quote Option 1
- Quote Option 2
- Terms & Conditions

DocumentsCorePack Dialog

Choose your document process.

Select all

Cover	Opportunity_Cover.docx
<input checked="" type="checkbox"/> QUOTES	
<input checked="" type="checkbox"/> (1) DCP SB XXL (up to 600 users)	Quote_Grouped_Demo_TG.docx
<input checked="" type="checkbox"/> DE DCP SB XXL (up to 600 users)	Quote_Grouped_Demo_TG.docx
T&C	Terms and Conditions

Document Options >

SharePoint integration for Email Attachments

Attach documents from SharePoint to emails generated via the Dialog

DocumentsCorePack Dialog

Define your document process. [Click here](#) to learn about One-Click Actions.

Filetype: pdf

Attach document as email attachment **1**

Additional Attachments **2** Select Files

Open in local email client

Email Sender: Current User

Recipient(s): Select options

Email Template: No selection

Send Email(s)

Print document

Save to SharePoint

Run workflow: Contact-bulk-AMWM

Create Document >

Document - Selection

Laptops & Monitors + Setup service | SharePoint Document Location AMe5ab2f01-cf8f-4c80-865d-73f684deeeed | search

SharePoint Document Location AMe5ab2f01-cf8f-4c80-865d-73f684deeeed

Document Name	Author	Modified
<input checked="" type="checkbox"/> Dell Inspiron 16.pdf	John Snow	2023-11-22T07:27:09Z
<input checked="" type="checkbox"/> Dell installation configuration.pdf	John Snow	2023-11-22T07:27:09Z
<input checked="" type="checkbox"/> Dell UltraSharp 27 4K.pdf	John Snow	2023-11-22T07:27:09Z
<input checked="" type="checkbox"/> DELL XPS 15.pdf	John Snow	2023-11-22T07:27:09Z
<input type="checkbox"/> mscrm-addonscom_QUO-01034-T0L6G5.pdf	John Snow	2023-11-20T15:34:34Z
<input type="checkbox"/> QUO-01034-mscrm-addonscom.pdf	John Snow	2023-11-10T10:37:48Z

Selected Files:
 DELL XPS 15.pdf x Dell UltraSharp 27 4K.pdf x Dell installation configuration.pdf x Dell Inspiron 16.pdf x

Ok



Live Demo:

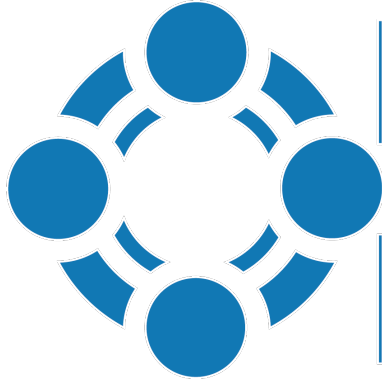
- Use Case: Create Proposals
- Step-by-Step: Configuring Dynamic Documents
- Step-by-Step: Attach emails from SharePoint

Free Trial

- **Free Trials Available** for all Add-Ons
- No functional limitations
- Fully supported
- ~30 minutes to get started



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