Comparison:

CRM 2016 document generation &

DocumentsCorePack by mscrm-addons.com

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With Microsoft Dynamics CRM 2016 Microsoft presents a new method of document generation replacing the existing MailMerge that was introduced in CRM 4.0.

This overview allows a comparison of the new native document generation with **DocumentsCorePack by mscrm-addons.com** at a glance.

	Native Document Generation in Dynamics CRM 2016	DocumentsCorePack by mscrm-addons.com
Document Generation		
One click document generation	✔	✔
Supported File types	docx	docx, PDF, html, text, eml, png, bmp,…
Generate activities e.g. email with document attached	✘	✔ email, letter & fax
Generate email messages	✘	✔ CRM-emails and *.eml
eSignature integration	✘	✔ DocuSign and AssureSign
Save documents to SharePoint	✘	✔
Create SharePoint locations	✘	✔
Write Metadata to SharePoint	✘	✔
Print documents	✘	✔
Define Commands e.g. create document & send by email	✘	✔
Document Preview	✘	✔
Edit in Word Online	✘	✔
Trigger Workflow on document completion	✘	✔
Batch processing from CRM Grid	✘	✔
Combine documents	✘	✔
Workflow integration		
Create document in Workflow	✔	✔
Attach to Email	✘	✔
Save to SharePoint	✘	✔
Create Locations on SharePoint	✘	✔
Attach as Note	✔ note located at primary record	✔
Configurable save locations	✘	✔
Attach to letter	✘	✔
Print documents	✘	✔

The content was written based on the knowledge and status of the CRM 2016 version available on the 15th of December 2015. The content is subject to change upon updates to either of the products.

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Template Design		
Microsoft Word template designer	✔	✔
Support for custom entities	✔	✔
Related records		✔
Relationship-types many-to-one, on-to-many many-to-many	✔ limited to one level	✔
Resolve multiple levels	✖ e.g. qutoe->quoteproduct->product not possible	✔
Filter related records	✖	✔
Sorting	✖	✔
Grouping & Totals	✖	✔
Define document names	✖	✔
Calculations	✖	✔
Conditions	✔	✔
Pictures		
Saved as note in CRM	✖	✔
Entity Images	✔	✔
Saved as web-path in CRM	✖	✔
Insert HTML	✖	✔
QR codes based on CRM data	✖	✔
Insert dynamic hyperlinks	✖	✔
Field formatting	✖	✔ format optoins for all CRM field types

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