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Your company for MS-CRM ADD-ONS!

DOCUMENTSCOREPACK - GETTING STARTED FROM APPSOURCE

November 2023

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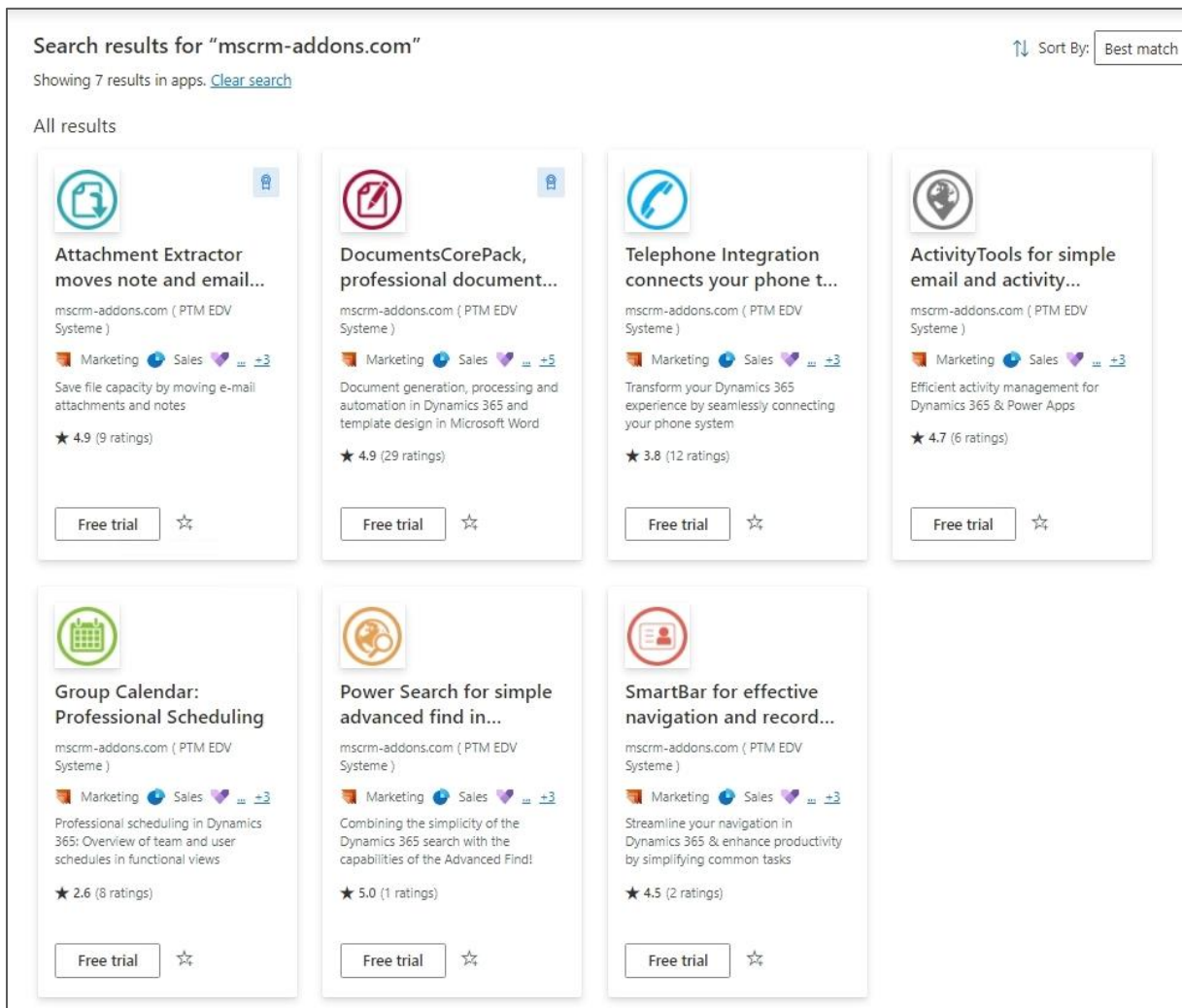
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1. DocumentsCorePack – Getting started

Hello! Thank you for your interest in DocumentsCorePack. You can now use the Microsoft Power Platform admin center to install, configure, and manage Dynamics 365 apps such as all **mscrm-addons.com** products that run on Microsoft Dataverse. Follow the way to install DocumentsCorePack from [Microsoft Power Platform admin](#) center:

Open the [Microsoft AppSource](#) and enter in the search field **mscrm-addons.com**. All **mscrm-addons** products are shown.

Select **DocumentsCorePack** by clicking **Free trial**.



Search results for "mscrm-addons.com" Sort By: Best match

Showing 7 results in apps. [Clear search](#)

All results

App Name	Rating	Free Trial
Attachment Extractor moves note and email...	★ 4.9 (9 ratings)	Free trial
DocumentsCorePack, professional document...	★ 4.9 (29 ratings)	Free trial
Telephone Integration connects your phone t...	★ 3.8 (12 ratings)	Free trial
ActivityTools for simple email and activity...	★ 4.7 (6 ratings)	Free trial
Group Calendar: Professional Scheduling	★ 2.6 (8 ratings)	Free trial
Power Search for simple advanced find in...	★ 5.0 (1 ratings)	Free trial
SmartBar for effective navigation and record...	★ 4.5 (2 ratings)	Free trial

Figure 1: Search result for mscrm-addons.com

Please confirm your details with **Free trial** to continue.

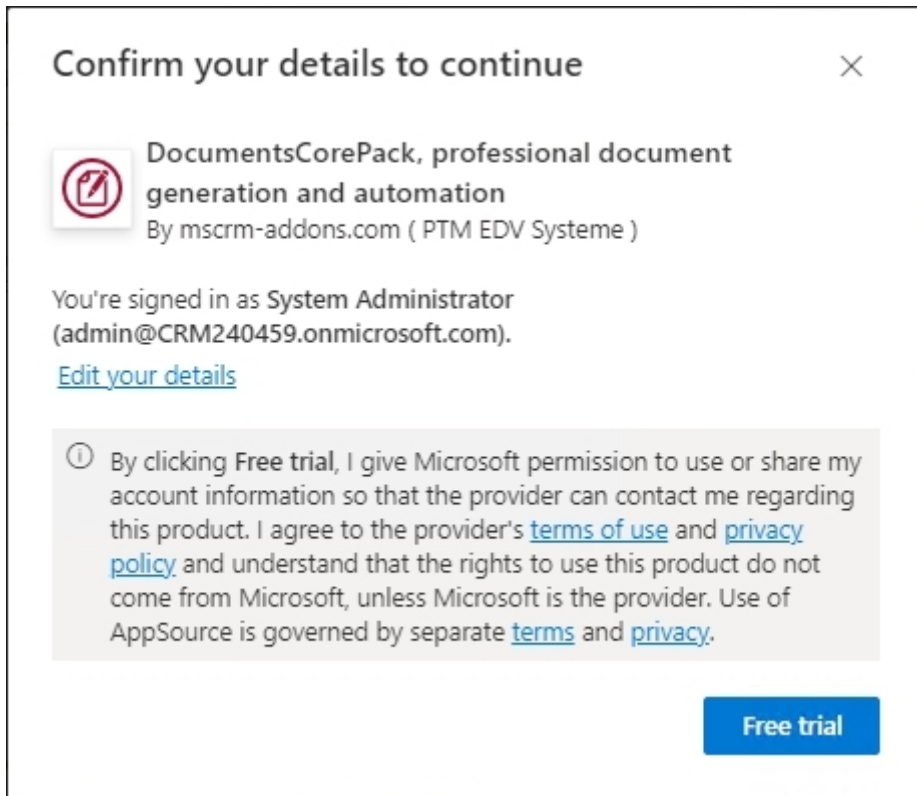


Figure 2: Confirm details

You can see in the details overview that **DocumentsCorePack: Document automation** is installed.

Environments > CRM240459 > Dynamics 365 apps

Check the status of Dynamics 365 apps and manage them across your org. [Learn more](#)


Name ↑		Status	Publisher
Agent Productivity Tools	...	Installed	Microsoft Dynamics 365
appprofilemanager	...	Installed	Microsoft Dynamics 365
Attachment Extractor Move content out of Dataverse	...	Installed	mscrm-addons.com (PTM EDV Systeme)
Connected Field Service Add-on	...	Installed	Microsoft Dynamics 365
Data Archive Service - Trial	...	Installed	Microsoft Dynamics 365
Data Validation App	...	Installed	Microsoft Dynamics 365
Dataverse Accelerator	...	Installed	Microsoft Corp - Power CAT
 Documents Core Pack: Document automation	...	Installed	mscrm-addons.com (PTM EDV Systeme)

Figure 3: Addon-on installed

Navigate to your Dynamics 365 (Advanced Settings) to open DocumentsCorePack.

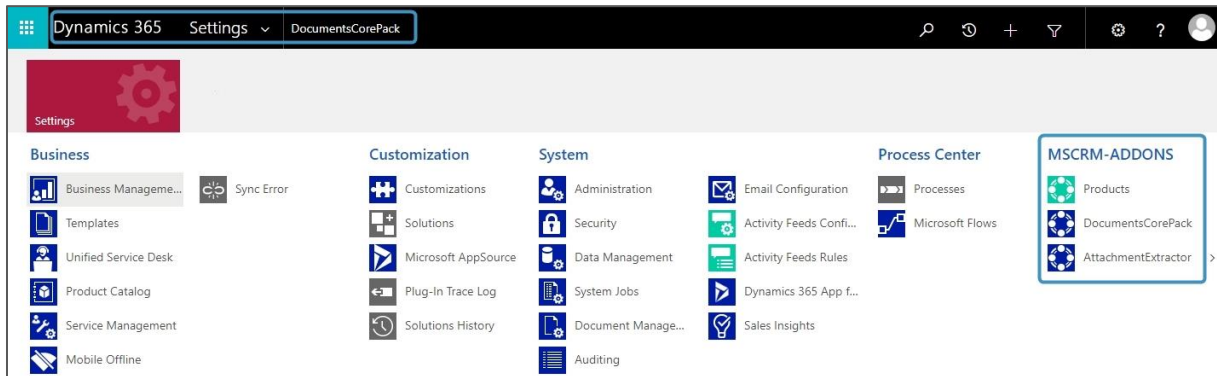


Figure 4: DocumentsCorePack in Dynamics 365

A click on DocumentsCorePack leads you to the DocumentsCorePack Getting Started page. Hit the **Configure Service**-button to proceed.

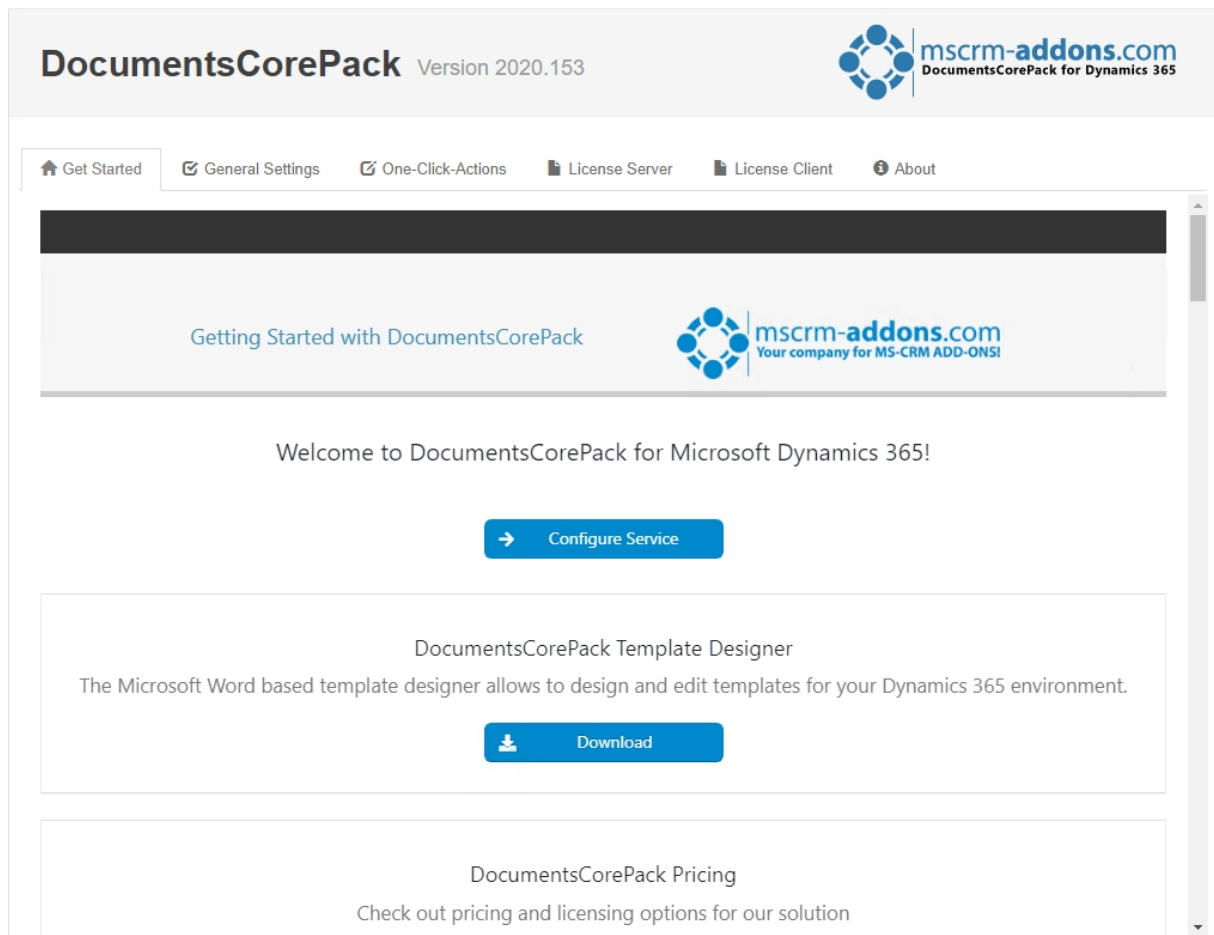



Figure 5: Start configuring DocumentsCorePack

To configure the document generation service, you have to **Login** with an existing mscrm-addons.com user account.

Getting Started with DocumentsCorePack 

Welcome to DocumentsCorePack for Microsoft Dynamics 365!

The final piece missing is to configure the document generation service below.

- 1 Enter your email address in the form below or login with an existing mscrm-addons.com user account
- 2 Configure the service and watch our short video on [Getting Started](#) with DocumentsCorePack
- 3 Download the Template Designer in the [download](#) section of our website

[Login](#)

DocumentsCorePack Template Designer

The Microsoft Word based template designer allows to design and edit templates for your Dynamics 365 environment.

[Download](#)

DocumentsCorePack Pricing


Check out pricing and licensing options for our solution

[Buy Now!](#)

Figure 6: Login with an existing mscrm-addons.com user account

Next step on this page is, which opens, press the **Start** button.

Getting Started with DocumentsCorePack



Welcome to DocumentsCorePack for Microsoft Dynamics 365!

DocumentsCorePack Service Setup and Configuration

This wizard allows to provision a document generation service that is required to generate documents.
The following steps will be performed upon clicking "Start":

1. **Define connection:** you will be prompted to login with the user that should be used to connect the service with your Dynamics 365 instance.
Note: Dynamics 365 administrator privileges are required.
2. **Service provisioning:** Once connected our wizard will go ahead and perform the following steps automatically:
 - Import solutions
 - Create default settings
 - Apply security roles
 - Create service

[+ Start](#)

[+ Advanced Configuration](#)

Figure 7: To continue press Start button

Now log in with the user that should be used to connect the service with your Dynamics 365 instance.

Please note: Dynamics 365 administrator privileges are required!

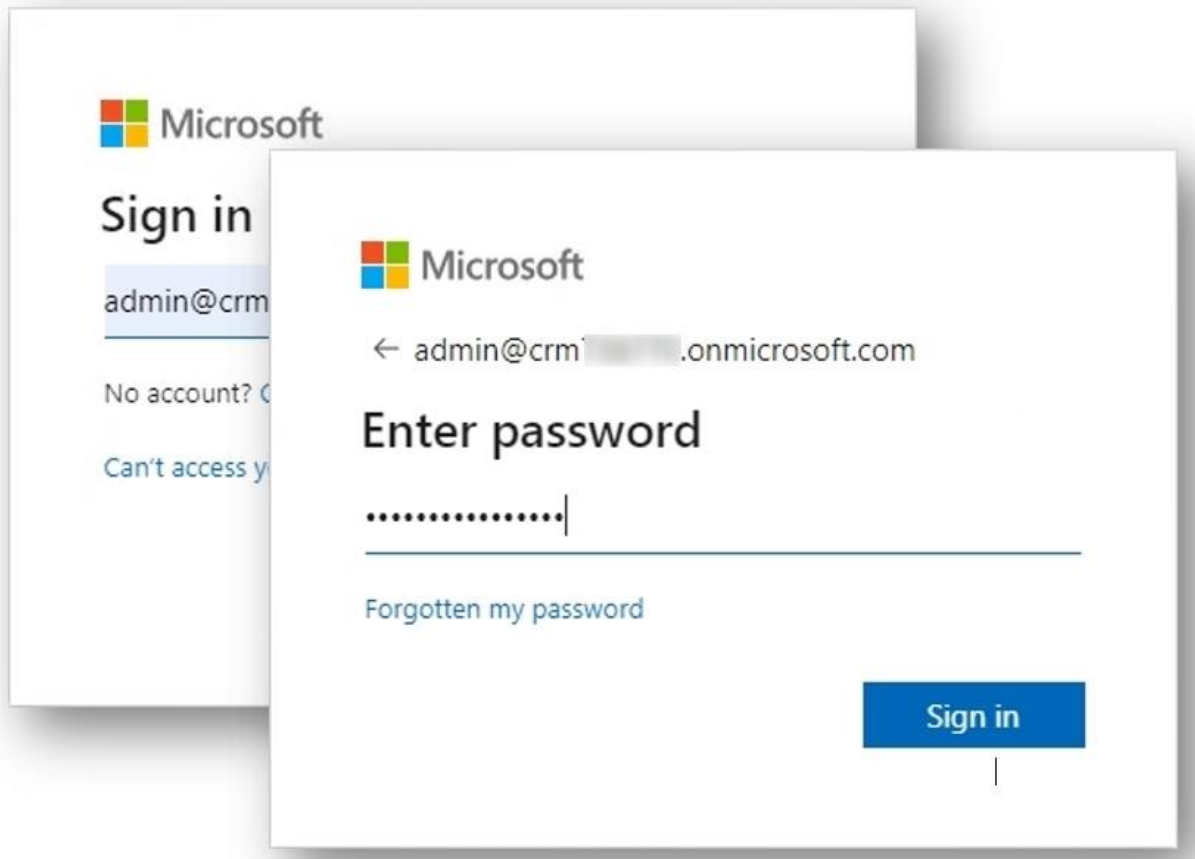


Figure 8: Required login

The service installation starts!

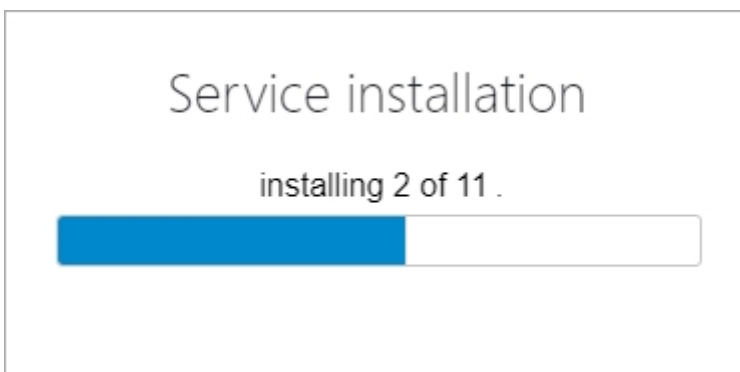


Figure 9: Service is installing

The **Service installation** window pops up with information on the next steps. This means that you have finished the installation successfully. Hit the **OK** button to continue.

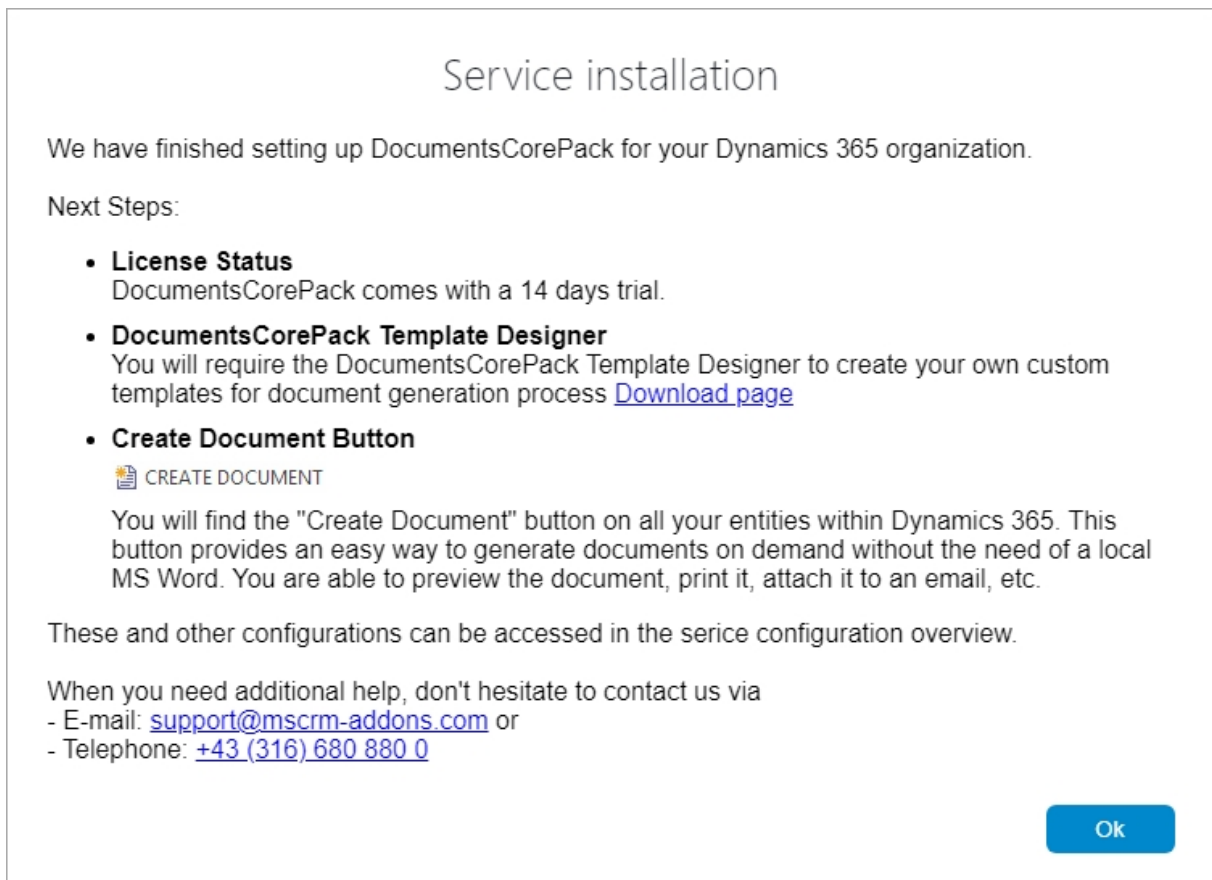


Figure 10: Service installation window

Once the installation is completed, please also have a look at the [DocumentsCorePack User Guide](#) which gives you detailed explanations of all functionalities provided by DocumentsCorePack. It aims to describe the main settings, including step-by-step descriptions about how to use all the benefits provided by our solution.

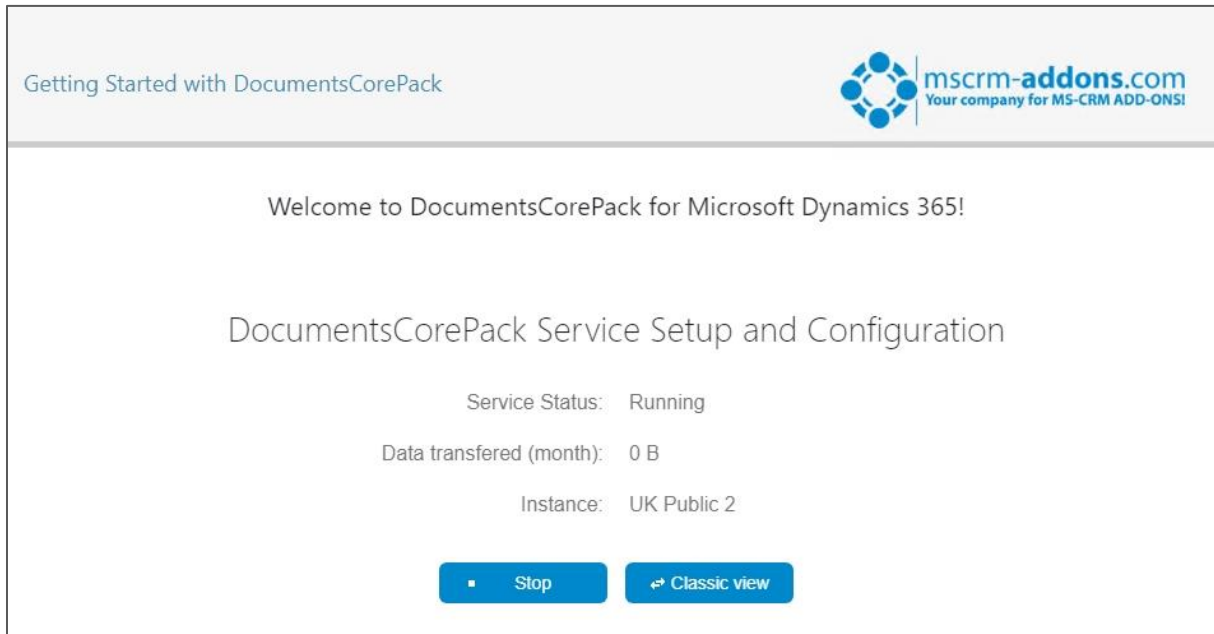


Figure 11: Completed installation

2. DocumentsCorePack – overview

We already discussed the **1 Get Started** tab in chapter 1. Now let's have a closer look to the other tabs.

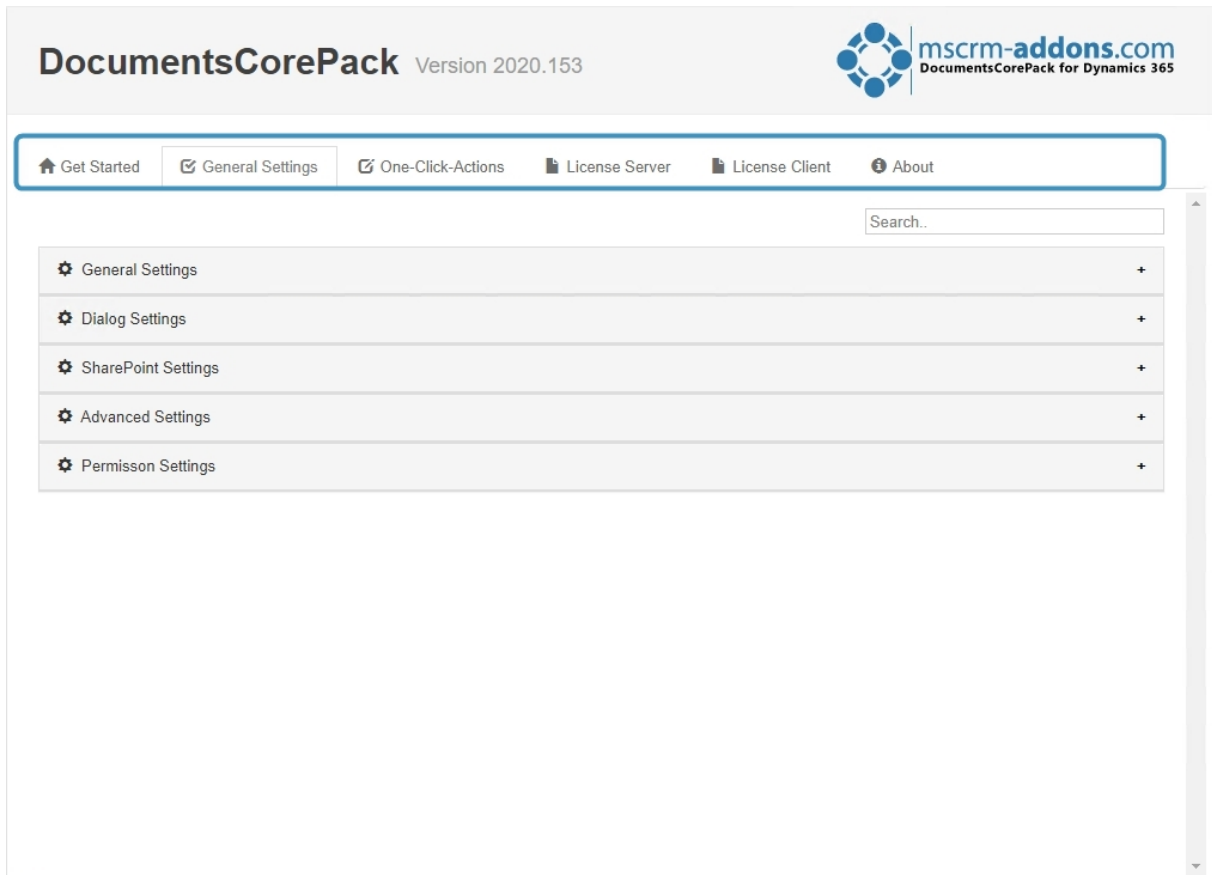


Figure 12: DocumentsCorePack tabs overview

2.1. The General Settings tab

2 General Settings

- **Change DCP-button icon color for Unified Interface:** The default **DCP** button icon color for the new UCI is black. You can change the icon color to white in case you have a dark menu background.
- **Disable Template Preview:** The [Template Preview](#) will not be visible in the Client and the preview image will not be saved in your system. <DCP:DisableTemplatePreviewImageUpload>
- **Enable Template Versioning:** [Template Versions](#) keeps backups of your saved templates in your system. <DCP:EnableTemplateVersioning>
- **Excluding entities from metadata:** This setting excludes the selected entities, so they are not displayed on the DocumentsCorePack client-side. <DCP:metadataexclusionlist>



- **OLE DB Designer:** Enables designer support for connections to an external database. <DCP:EnableExternalDataBaseDesigner>
- **PDF/A Compliance:** Saves all PDFs as PDF/A – 1a or 1b compliant documents. <AM:PDFCompliance>
- **Enable Open Path Font support for PDF's:** Enables designer support for connections for external database. <DCP:EnableTextShaper>
- **Template Selection Column Configuration:** Allows defining the columns that are seen in the **Open-** and **Save** dialogs on the Server or the Client. <DCP:OpenTemplateDialogProperties>
- **Use DCP Lookup Dialog:** Displays a custom [Lookup-Dialog](#) instead of the Dynamics 365 Lookup-Dialog in the DocumentsCorePack TemplateDesigner. <DCP:alternativeLookupDlg>

2 Dialog Settings

- **Add Cc:** Add Cc for recipients. <AM:DialogAddCc>
- **Add Bcc:** Add Bcc for recipients. <AM:DialogAddBcc>
- **Add current User to BCC:** This setting will add the current user to bcc in emails. <AM:AddCurrentUserToBcc>
- **Allow Word Online Edit:** Disable the Word Online edit Functionality. <AM:DisableWordOnlineEdit>
- **Allow edit templates:** This will allow users to edit the templates (SharePoint required). <AM:AllowTemplateEdit>
- **Unique Template Filename:** Use unique template filename when editing the template temporarily in the Dialog. <AM: UniqueTemplateFilename>
- **Always Create AutoMergeworkingItems:** The dialog will generate the documents always through the DCP service. <AM:AlwaysCreateWorkingItem>
- **Always show the SharePoint Option:** Will always show the SharePoint option (if enabled with "usespsfordocuments") also when the entity is not configured for SPS. <AM:SkipDocumentManagementSettings>
- **Assign printers to teams or users:** <AM:PrinterUserMapping>
- **'Create Document' button Entity Configuration:** Select the entities where you want to see the **Create Document** button. <DCP:AMCreateDocumentButtonEntities>
- **Custom Language Web Resource:** Unique web resource name of the custom language file. <AM:CustomLanguageFileWebResourceName>
- **Check Sharepoint file locks:** The dialog checks if the file is still in use before converting it to PDF. <AM:checkspslocks>
- **Disable PNG preview:** This setting disables the PNG preview of the generated document in the DCP Dialog. <AM:DisablePNGPReview>
- **Max count of preview pages:** This setting defines how many pages will be generated in the dialog – preview. Per default, there are 5 pages shown. <AM:Maxpreviewpage>



- **Print Batch separated:** Batches that will be printed could be sent to the printer as individual documents or as one large document. <AM:PrintBatchSeparated>
- **Script Debugging:** Enables the JavaScript "debugger" statements. <AM:ScriptDebug>
- **Show All Recipients:** This will show every lookup as a recipient in the dialog. <AM:ShowAllRecipients>
- **Show marketing list templates:** Instead of starting the dialog for the marketing list members, execute the dialog for the marketing list itself and shows marketing list templates. <AM:ShowMarketingListTemplates>
- **Single Document Timeout:** Timeout to wait for a document to finish. <AM:SingleDocumentTimeout>
- **Store SharePoint Attachment on Letter:** To store the SharePoint document in the letter. <AM:StoreSpsAttachmentOnLetter>
- **Use Office URI Schemes:** Use Office URI Schemes to open the document from SharePoint. <AM:PreventUrlPrefix>
- **Batch Split:** Enable Batch Split. <AM:EnableBatchSplit>
- **Batch Split Min Value:** Set the minimum value for Batch Split. <AM:BatchSplitMinValue>

3 SharePoint Settings

- **Alternative SharePoint Authentication Type:** Change this Setting if the SharePoint Authentication is different from the Dynamics Authentication Type. <DCP:AlternativeSPConfiguration>
- **Create SharePoint folders with entity GUID:** Usually, CRM adds a GUID when creating a SharePoint path.(e.g.: https://sps/account/ptm edv systeme_GUID)By using our Document location logic, you can disable this behavior. <AM:use2013documentlocationlogic>
- **SharePoint Force Checkin:** Check-in a file on SharePoint after generation. <AM:SPForceCheckin>
- **SharePoint Force Checkin Versioning Major:** Create major versions on check-in. <AM:SPForceCheckinVersioningMajor>
- **SharePoint Location Field:** The field that contains the SharePoint location. This means that the generated document is saved in the declared SharePoint location. However, if the field is empty, an error is issued. <AM:SharePointLocationField>
- **SharePoint Overwrite documents with the same name:** If a file with the same name exists on the SharePoint location, it will be overwritten. If false the name will be changed automatically. (e.g. test (2).pdf). <AM:FileOverwrite>
- **SharePoint Result Field (XML):** Defines the result field for the SharePoint location. Saves the SharePoint Path back to the defined field. <Entities><case>ptm_spfield</case></Entities>. <AM:SPResultfield>



- **SharePoint Server2Server (read-only):** Auth option, logon using Microsoft OAuth flow. Can be set up via the DCP service configuration. <AM:Server2ServerSharepointEnabled>
- **SPS User:** Please enter your SharePoint user here. Should you have any trouble with SharePoint, please check your settings in this tab before you contact our support. <AM:SPSUser>
- **SPS Password:** Please enter your Sharepoint password here. <AM:SPSPassword>
- **SharePoint FormsAuthentication:** Another authentication type. <AM:SPFormsAuthentication>
- **SharePoint Temp Folder:** Defines where the SharePoint temp files will be saved. If you are not satisfied with the file location, you may change it, but it is not recommended to do so without consulting our support. <AM:SharePointTempFolder>
- **SharePoint filename min length:** If the Sharepoint filename length is exceeding the maximum specified value, the name is cut to the maximum allowed length (Does not apply to existing folders). <AM:SPMinFileNameLength>
- **SharePoint filename max length:** If the length of the SharePoint file is greater than 400 characters then the length of the filename is shortened to 400 characters. <AM:SPMaxFileNameLength>
- **SharePoint folder name attribute:** Defines which parameter is used in order to create a folder name. <AM:SPFolderNameAttribute>
- **SharePoint folder max length:** If the length of a SharePoint folders' name is exceeding the maximum specified value, the name is cut to the maximum allowed length (Does not apply to existing folders). <AM:SPMaxFolderLength>
- **Try to assign logged on user for documents saved on SharePoint:** The service usually runs via a special user, but if you do not want this, you can enable this setting. Once activated, the service will always try to login as the current user. <AM:SPAssignToUser>
- **Use short Documentlocation Logic:** Replaces the GUID with a tag (6byte).(e.g. https://sps/account/ptm edv systeme_ M8j9IT) IMPORTANT: This requires that the "Use 2013 Document location logic" is "active" too. <AM:use2013documentlocationlogic_short>

3 Advanced Settings

- **Adobe Sign Impersonation Enabled:** Default AdobeSign user context is the service user but can be changed to the executing user when enabled. <AM:AdobeSignImpersonateEnabled>
- **Async Print Jobs:** If this option is activated, the print jobs are sent to the printer asynchronously. <AM:PrintAsync>
- **Debug Max Length:** Please do not change this setting unless you are told to do so. <AM:debugmaxlength>
- **Don't show following Entities:** The selected entites will not be shown in the Template Designer. <DCP:EntitiesDontShow>
- **SP Webservice Url:** <AM:SPWebserviceUrl>
- **Use Alternative Pushlogic:** Use alternative pushlogic for onpremise services.
- **Use Alternative Pushlogic Only For Printjobs:** Use this option if you have your printapplication installed locally and the DocumentsCorePack service is hosted on mscrm-addons datacenter. <AM:usenewpushrequestprintonly>

5 Permission Settings

- **Config Access Permissions:** Configure the access permission for this config.

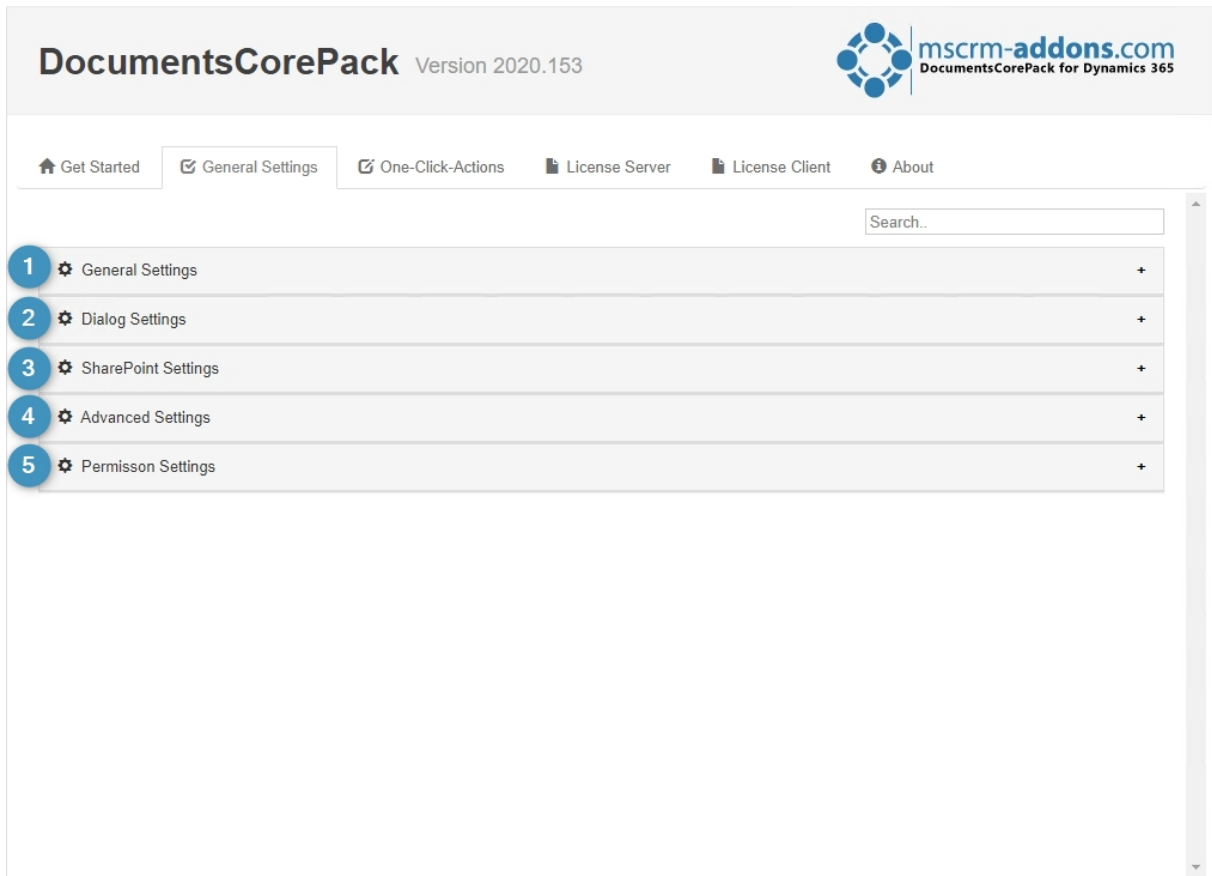


Figure 13: DCP settings

When you have finished the settings, don't forget to **Save Configuration**.

2.2. The One-Click-Action tab

Next to generating documents, DocumentsCorePack comes with a variety of processing options like **send by email**, **send for e-Signing** or **print document**. One-Click-Actions (OCAs) are predefined settings for the DocumentsCorePack dialog. They allow for simplifying, standardizing and speeding up document-related business processes within Dynamics 365 and Power Apps. This article outlines the cases & benefits for OCAs.

Learn more in this [video](#) or have a look at our [documentation](#).

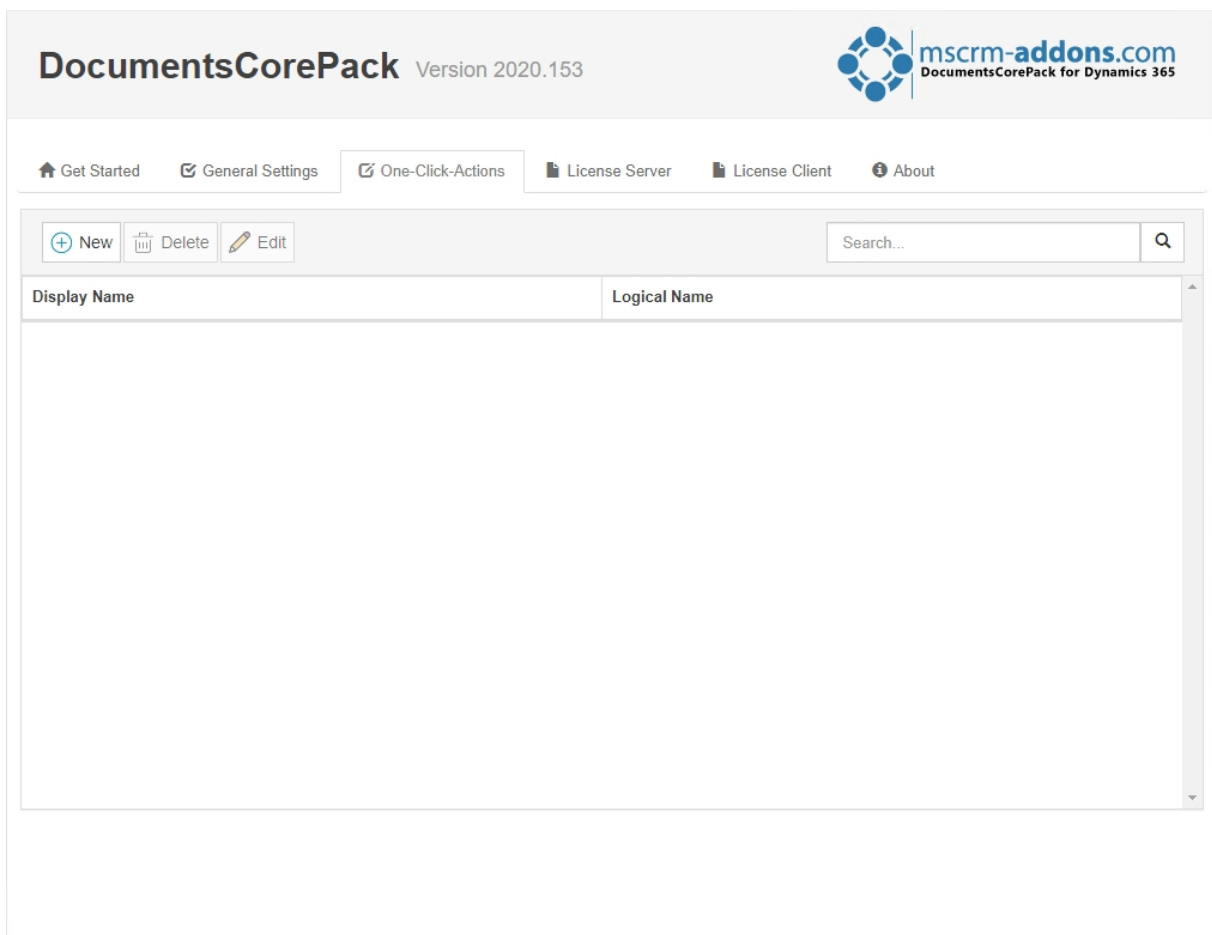
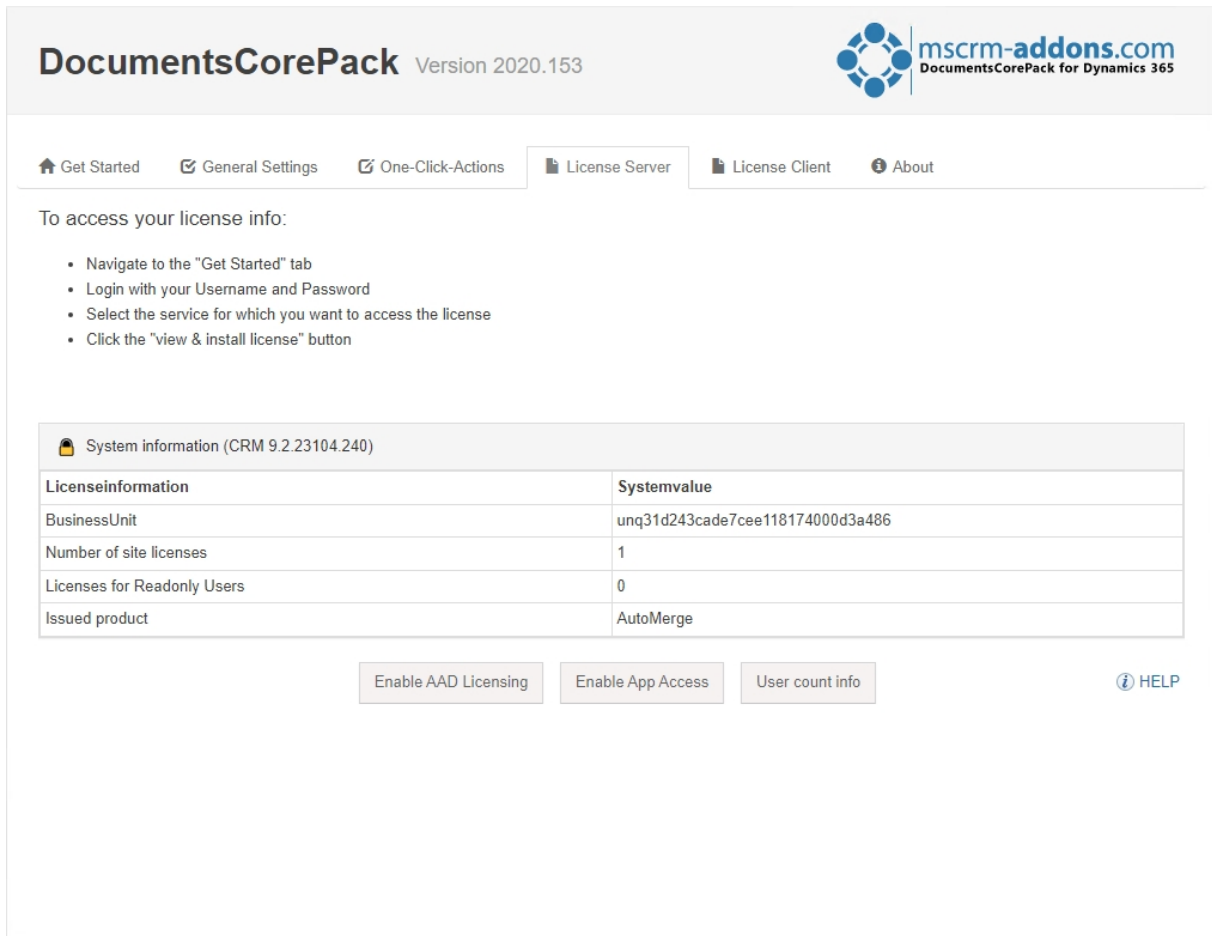


Figure 14: One-Click-Action tab

2.3. The License Server tab

Learn more about licensing in our [Guide](#).



The screenshot shows the 'License Server' tab in the DocumentsCorePack interface. The header includes the product name 'DocumentsCorePack' and version '2020.153'. The navigation menu contains 'Get Started', 'General Settings', 'One-Click-Actions', 'License Server' (active), 'License Client', and 'About'. Below the navigation, instructions are provided for accessing license information. A table displays system information for CRM 9.2.23104.240, including BusinessUnit, Number of site licenses, Licenses for Readonly Users, and Issued product. At the bottom, there are buttons for 'Enable AAD Licensing', 'Enable App Access', and 'User count info', along with a 'HELP' link.

DocumentsCorePack Version 2020.153

mscrm-addons.com
DocumentsCorePack for Dynamics 365

Get Started General Settings One-Click-Actions **License Server** License Client About

To access your license info:

- Navigate to the "Get Started" tab
- Login with your Username and Password
- Select the service for which you want to access the license
- Click the "view & install license" button

System information (CRM 9.2.23104.240)

Licenseinformation	Systemvalue
BusinessUnit	unq31d243cade7cee118174000d3a486
Number of site licenses	1
Licenses for Readonly Users	0
Issued product	AutoMerge


Enable AAD Licensing Enable App Access User count info [HELP](#)

Figure 15: Licensing server tab

2.4. The License Client tab

Find here all information to your license state.


DocumentsCorePack Version 2020.153




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DocumentsCorePack for Dynamics 365

[Get Started](#) |
 [General Settings](#) |
 [One-Click-Actions](#) |
 [License Server](#) |
 [License Client](#) |
 [About](#)

Licenseinformation	LicenseValue	Systemvalue	Status
LicenseState		valid	✔
LicenseState		accessPossible	✔

 General license information (CRM 9.2.23104.240)

Licenseinformation	LicenseValue	Systemvalue	Status
Licensemodel	perUser		?
Licensekey	Xj+uuMMHdxU5TNzdx6/eavKOzglABk...	Licensekey installed	?

 License validation information

Licenseinformation	LicenseValue	Systemvalue	Status
BusinessUnit	unq31d243cade7cee118174000d3a486	unq31d243cade7cee118174000d3a486	✔
UserInformation	fullAccess	accessPossible	✔
Number of user licenses	1	1	✔
Licenses for Readonly Users	0	0	✔
Expiration	3/31/2024 12:00:00 AM	129 days left	✔
Support	3/31/2024 12:00:00 AM	129 days left	✔
Issued product	DocumentsCorePack	DocumentsCorePack	✔
Version upgrade covered till	3/31/2024 12:00:00 AM	10/19/2023 11:47:40 AM	✔

Install license

Activate Users

Enable AAD Licensing

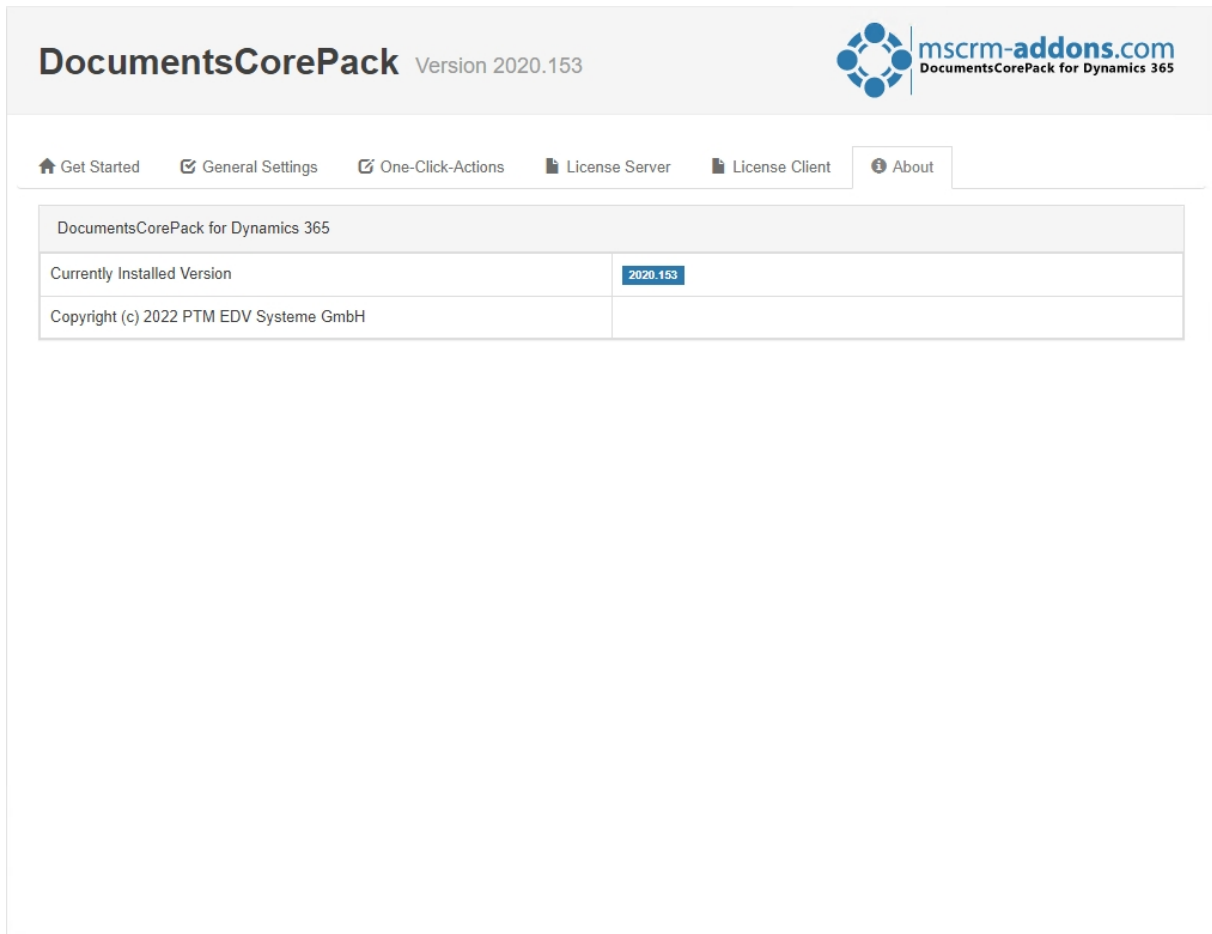
User count info

[? HELP](#)

Figure 16: The License client tab

2.5. The About tab

Get here the information to your version and the publisher.



DocumentsCorePack Version 2020.153

mscrm-addons.com
DocumentsCorePack for Dynamics 365

Get Started General Settings One-Click-Actions License Server License Client About

DocumentsCorePack for Dynamics 365	
Currently Installed Version	2020.153
Copyright (c) 2022 PTM EDV Systeme GmbH	

Figure 17: The About tab

3. How to use DocumentsCorePack

DocumentsCorePack provides the possibility to create and print documents automatically triggered from a workflow or dialog. After the document is created, it can be attached to emails and letters as well.

There is no client software necessary to use the DocumentsCorePack functionality. It can be accessed directly within Dynamics 365 from workflows and dialogs.

3.1. The DocumentsCorePack Dialog

With the **DocumentsCorePack dialog**, you can perform document processes with ease. The dialog guides users through the document generation process and offers a variety of options to process the document.

Learn in this [video](#) how the DocumentsCorePack Dialog works.

1. Open the DocumentsCorePack Dialog.

First, select the **Create Document** button in the CommandBar in order to access the DocumentsCorePack dialog from your Dynamics 365. Please note that you have to do this from the record you want to generate the document for. In our case, we are starting from an account.

3.2. Create your own template

The DocumentsCorePack Template Designer is a Microsoft Word extension that allows the creation & design of document templates used by DocumentsCorePack.

The Template Designer will help you to create templates for each Microsoft Dynamics 365 entity (for example Contact, Account, Opportunities ...).

The DocumentsCorePack Template Designer can be easily accessed via the **www.mscrm-addons.com** – tab in the Microsoft Word command bar, as you can see in the figure below, and provides you with a lot of options that facilitate the creation of template.

Download DocumentsCorePack Template Designer [here](#) and learn how to create your own templates in this [documentation](#) or have a look at our [video](#).

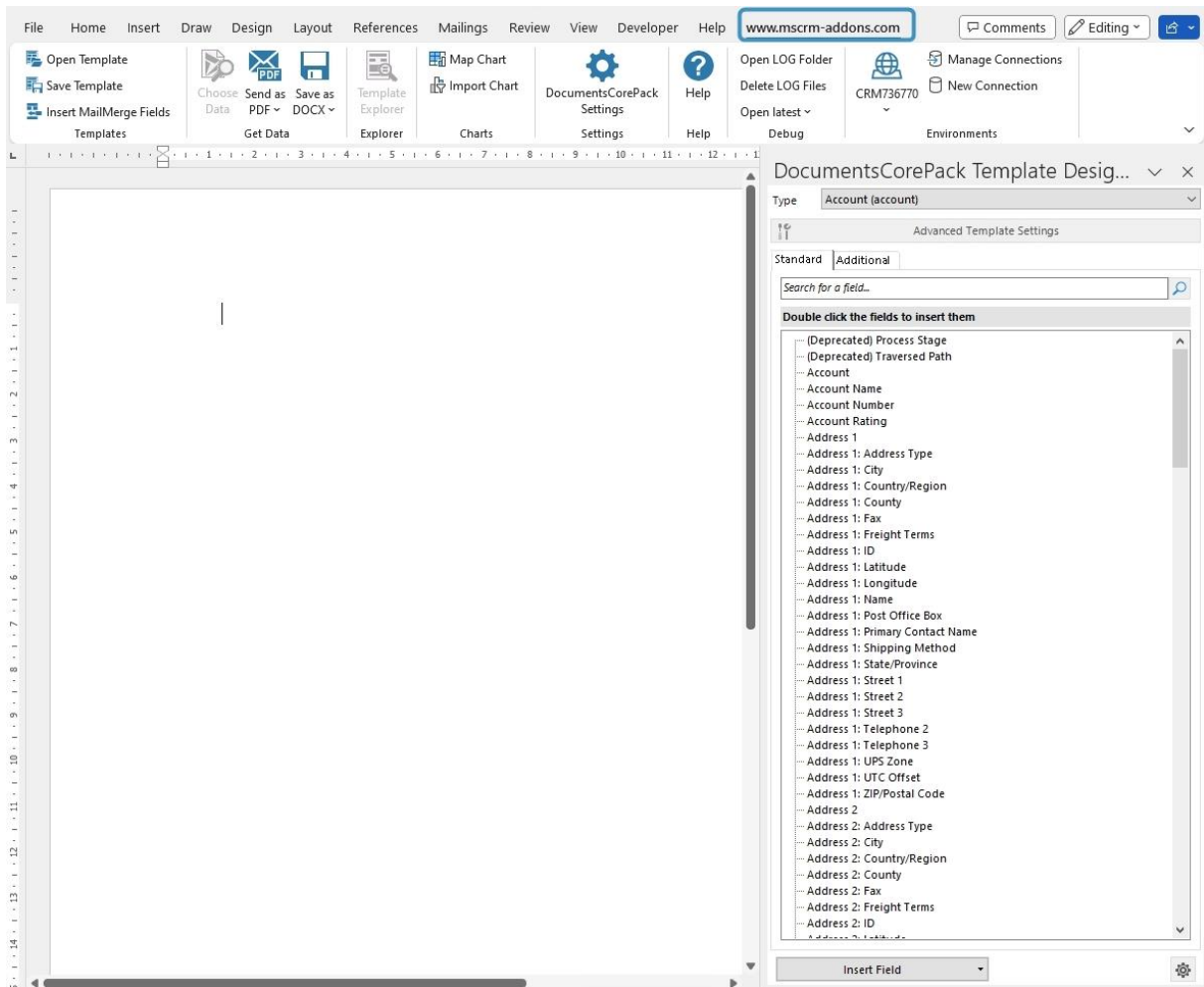


Figure 18: Access DocumentsCorePack Template Designer

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5. Contact

For further technical questions, please visit our [blog](#) or contact support@mscrm-addons.com. For sales and licensing questions please contact office@mscrm-addons.com or the corresponding contact information below.



Headquarter – Europe

PTM EDV-Systeme GmbH
Bahnhofgürtel 59
A-8020 Graz
Austria

Tel Austria +43 316 680-880-0
Fax +43 316 680-880-25

Support:

7AM - 7PM GMT+1 (Monday-Friday)

Sales:

[+43 316 680 880 14](tel:+4331668088014)
sales@mscrm-addons.com

www.ptm-edv.at
www.mscrm-addons.com



Headquarter – US

mscrm-addons.com Corp
1860 North Rock Springs Rd
Atlanta, GA 30324
United States

Tel US +1 404 720 6066

Support:

9AM - 6PM EST (Monday-Friday)

Sales:

+1 404 720 6046
ussales@mscrm-addons.com

www.mscrm-addons.com