

mscrm-addons.com
DocumentsCorePack
for Microsoft Dynamics CRM

DocumentsCorePack Online Configuration for Dynamics 365

August 2021

How to work with DocumentsCorePack Online Dynamics 365

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Preamble

This documentation is intended to guide you through the installation and usage of DocumentsCorePack Online Configuration for Microsoft Dynamics 365.

Target Audience

This guide is intended for users applying search queries with DocumentsCorePack who have the following minimum skills:

- Basic Microsoft Dynamics CRM Knowledge
- Maintaining and configuring a Microsoft CRM Organization

Supported Web Browsers and versions

Supported Web Browsers:

- Internet Explorer 10 and higher
- Chrome
- Edge
- Firefox

One of the following versions of Microsoft Dynamics CRM must be available:

- Microsoft Dynamics CRM Server 2015/2016
- Microsoft Dynamics 365
- Microsoft Dynamics CRM Online

Purpose of DocumentsCorePack Online Configuration

The DocumentsCorePack Online Configuration has many advantages, one of them being the reason that a local server is not required anymore. This means, that precious storage space is saved on your local server, while all ServerBased features of the add-ons are available. Furthermore, the services are hosted and updated by our support team.

1 Basics on Online Configuration

This documentation is divided into three parts. While the first part is filled with basic information on the online configuration, which is the same for DocumentsCorePack and AttachmentExtractor, part 2 and 3 of this documentation focus clearly on the differences between DocumentsCorePack and AttachmentExtractor.

ADDITIONAL MATERIALS

Next to this documentation, we do provide video tutorials for [DocumentsCorePack](#) that show how to start the Online Configuration step by step.

Also, you can find further information regarding the DocumentsCorePack Online Configuration [here](#).

For more detailed information, please read the now following chapters carefully.

1.1 How to start the Online Configuration

Start the Online Configuration for DocumentsCorePack by selecting the product and following the steps below.

1.1.1 Step 1: Open the Online Configuration Service for DocumentsCorePack

One possible way to start a new Online Service Configuration is via our website www.msrm-addons.com. On our website, please navigate to Products, select DocumentsCorePack (depends on which product you would like to configure) and then, click on the **[Start Tial (Service Setup)]**-button.

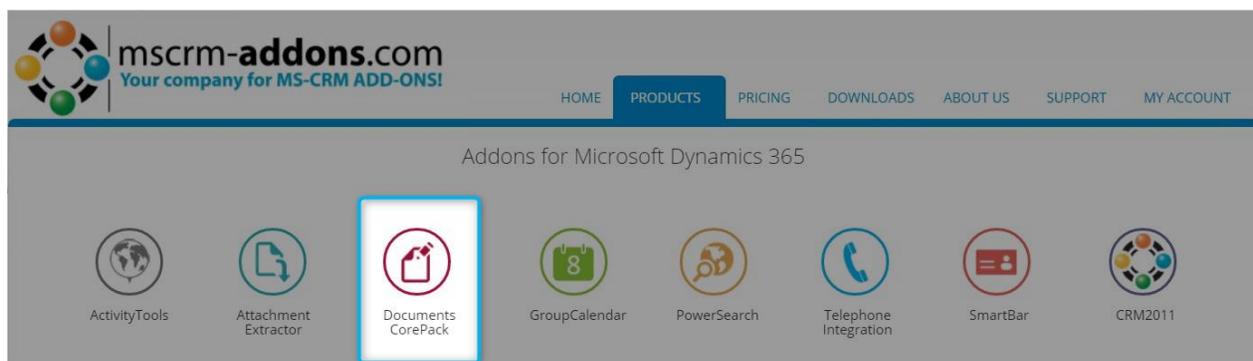
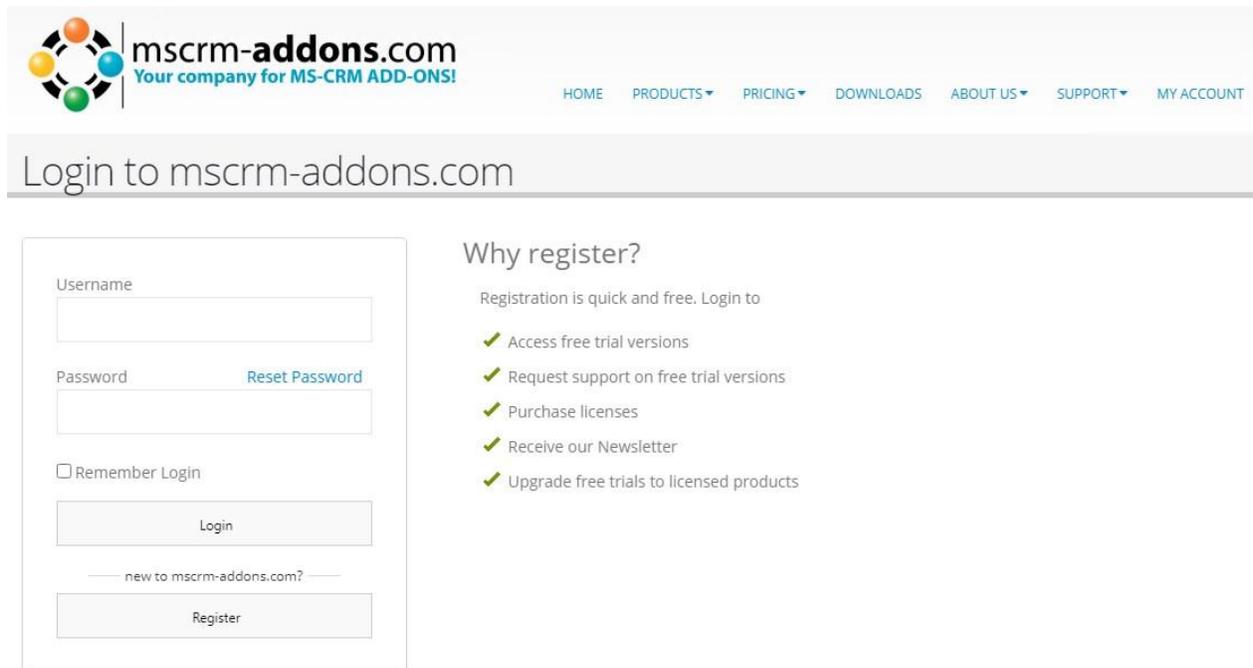


Figure 1: Select DocumentsCorePack for the Online Configuration

1.1.2 Step 2: Login or register to mscrm-addons.com



The screenshot shows the mscrm-addons.com website header with the logo and navigation menu. Below the header is a login and registration form. The form includes fields for Username and Password, a 'Remember Login' checkbox, and buttons for 'Login' and 'Register'. A 'Reset Password' link is also present. To the right of the form is a section titled 'Why register?' with a list of benefits: Access free trial versions, Request support on free trial versions, Purchase licenses, Receive our Newsletter, and Upgrade free trials to licensed products.

Figure 2: Login to mscrm-addons.com

1.1.3 The Online Configuration window

Once you have logged in, you will be provided with the Online Configuration window. Navigate to the "DocumentsCorePack"-tab, to configure a service for.

1 In this window's field, you get an overview of your hosted service(s). Provided, that you have already configured a service.



If there is no service configured, the field is empty.

Also, you have the possibility to setup a service with a click on the 2 **[Add]**-button.

DocumentsCorepack Online Configuration for Dynamics 365.

Hello kog Version 2020.06.7898.27109

On this page you can configure DocumentsCorePack or AttachmentExtractor for your CRM organization. [Take a quick tour](#)

DocumentsCorePack ServerBased (2) AttachmentExtractor (1)

Your available DocumentsCorePack services Search...

ID	Name	Status	Job Type	Data (this m...	Organization	CRM	Instance
37...	unq532bed0c93a64c369be661d10...	Running	Document G...	669,26 KB	CRM479934	https://org9434d7a7.crm4.d...	https://autom...
37...	unq5...c608d4307a7e2d7024...	Running	Document G...	0 B	CRM614680	https://org0f6f8b03.crm4.dy...	https://autom...

2

+

Figure 3: Online Configuration window

1.2 How to setup an MS Dynamics 365 Online Service for DocumentsCorePack

First, a connection to MS Dynamics 365 must be established via the CRM connection profile, which is required to connect Microsoft Dynamics 365 Online with your Microsoft Dynamics 365 organization.

Once you have setup your connection, you are ready to set up a DocumentsCorePack Service.

Look for further information on the setup of the configuration in [CHAPTER 2, ADVANCED ONLINE CONFIGURATION](#).



To establish the connection for DocumentsCorePack, please note that admin rights are required.

1.2.1 CRM Connection Setup – Settings

Find here a detailed description of the connection setup settings.

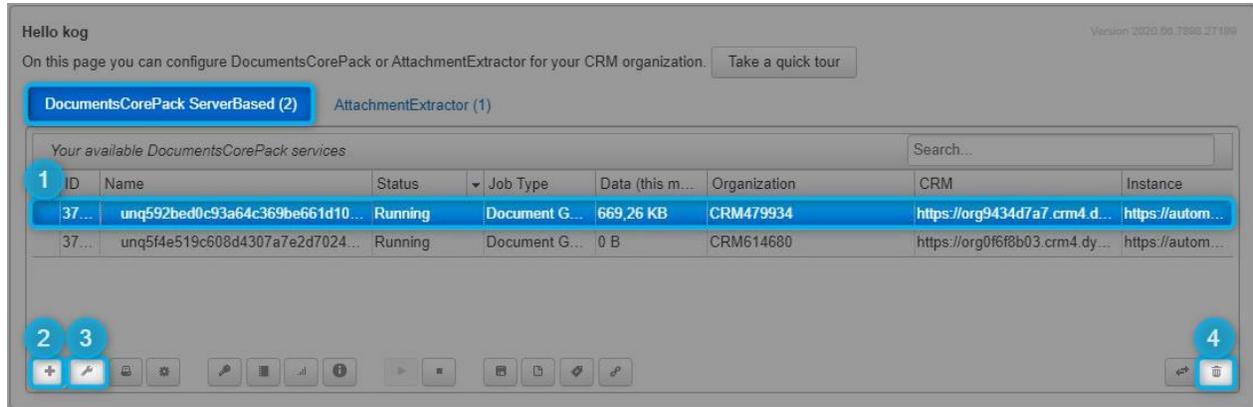


Figure 4: Available Online Services

1 CRM ONLINE SERVICES

In this section, you are provided with an overview of all available services. With a double-click on the service, you have the possibility to edit your service.

2 THE [ADD]-BUTTON

Please click on this button to add a new service. Next, click on the **[Connection Profile]**-button. In the so opened window, please enter your settings and click on the **[Verify Connection & Save Profile]**-button in the right lower corner. For further information, please have a look at [CHAPTER 3.1, HOW TO CREATE A CRM CONNECTION PROFILE](#).

3 THE [MANAGE]-BUTTON

Click here to modify the MS Dynamics 365 service and connection profile. Alternatively, you could double-click on the service you would like to modify. You will be provided with the details of your MS Dynamics 365 Online service and connection profile (please also see picture 7).



If a service is currently used by a DocumentsCorePack Service Configuration, you will only be allowed to change the user credentials. Also, you must select the same organization.

4 THE [DELETE]-BUTTON

If you do not need your Online service anymore, please click here to delete it. If you try to delete a service.

2 Advanced Online Configuration

During this chapter, you will find the advanced options explained in detail.

2.1 The Service Configuration Settings for DocumentsCorePack

Please find a detailed description on how to setup the service configuration in [CHAPTER ON PAGE](#). This chapter explains the general service configuration.

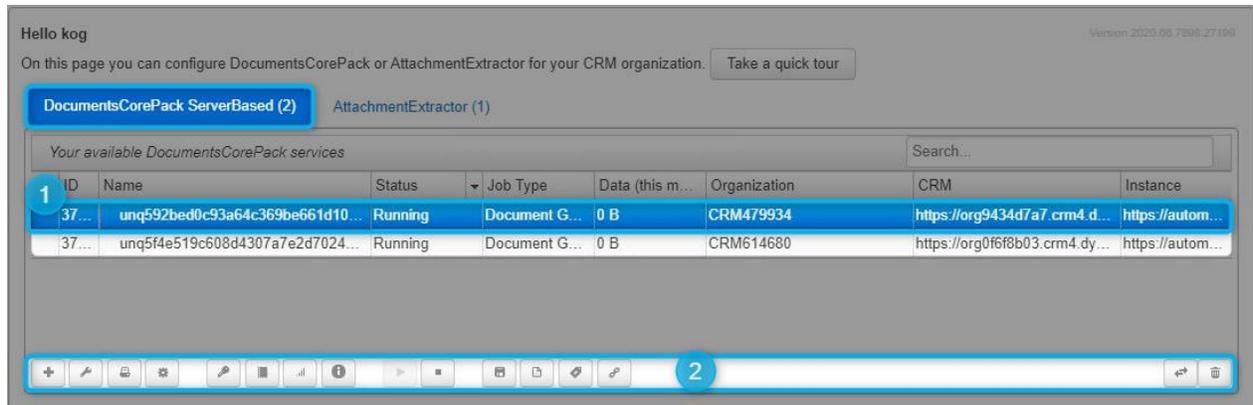


Figure 5: DCP Service Configuration Settings

1 SERVICE CONFIGURATION

This section provides you with an overview of your configured DocumentsCorePack Services. With a double-click on the configuration, you get the possibility to edit the service.

2 SERVICE CONFIGURATION BUTTONS

The buttons described here enable you to configure and modify your service, but a service has to be selected previously.

Certain functionalities can be applied to DocumentsCorePack. During this chapter, you will find a detailed description to the different functionalities.

2.1.1 The DocumentsCorePack Configuration buttons



Figure 6: DCP-Settings

1. ADD A NEW DOCUMENTSCOREPACK SERVICE OR CONFIGURE AN EXISTING ONE

Simply click on the **[Add]**-button (+) in order to create a new DocumentsCorePack Service.



One user can only be added to one service, for example: if user A has a service for one organization, user B cannot be added to the same organization.

2. CONFIGURE CLOUD PRINT

Once you have created a CRM Connection profile, the printing options can be specified here. Please make sure that you have already configured your Cloud Printers previously. Once configured, you can access printers from Power Automate, Dynamics 365 or your PowerApp.

3. CONFIGURE LOAD BALANCING

Select your Load Balancer Configuration here.

Load Balancer Configuration	
Available Load Balancer Services	0
How many load balancer would you like to configure?	<input type="text" value="0"/>
Reserved services for single documents only	<input type="text" value="0"/>
<input type="button" value="Apply"/> <input type="button" value="Remove Loadbalancing"/>	

Figure 7: Load Balancer Configuration

4. VIEW AND INSTALL THE LICENSE

If you click here, you will be provided with an overview of the installed license. Furthermore, you can install a new license here. Just switch to the product of your choice and click on the **[Install]**-button. DCP is delivered with a fully supported, 14-days trial license.

License

Server Based License
Client Based License
Users

DCP Server Based Subscription ID: -1. Please click here to change the subscription ID

Licenseinfo for DocumentsCorePack Server Based generation for Dynamics 365

Licenseinformation	Systemvalue	Status
Licensemodel		i
Licensekey (Trial)		i

Licenseinformation	Systemvalue	Status
BusinessUnit	unq592bed0c93a64c369be661d104f03	✔
Number of site licenses	20	✔
Licenses for Readonly Users	0	✔
Expiration	9/2/2021 8:10:49 AM (13 days left)	i
Support		✔
Issued product	DocumentsCorePack Server Based generation	✔
Version upgrade covered till	9/2/2021 8:10:49 AM	✔

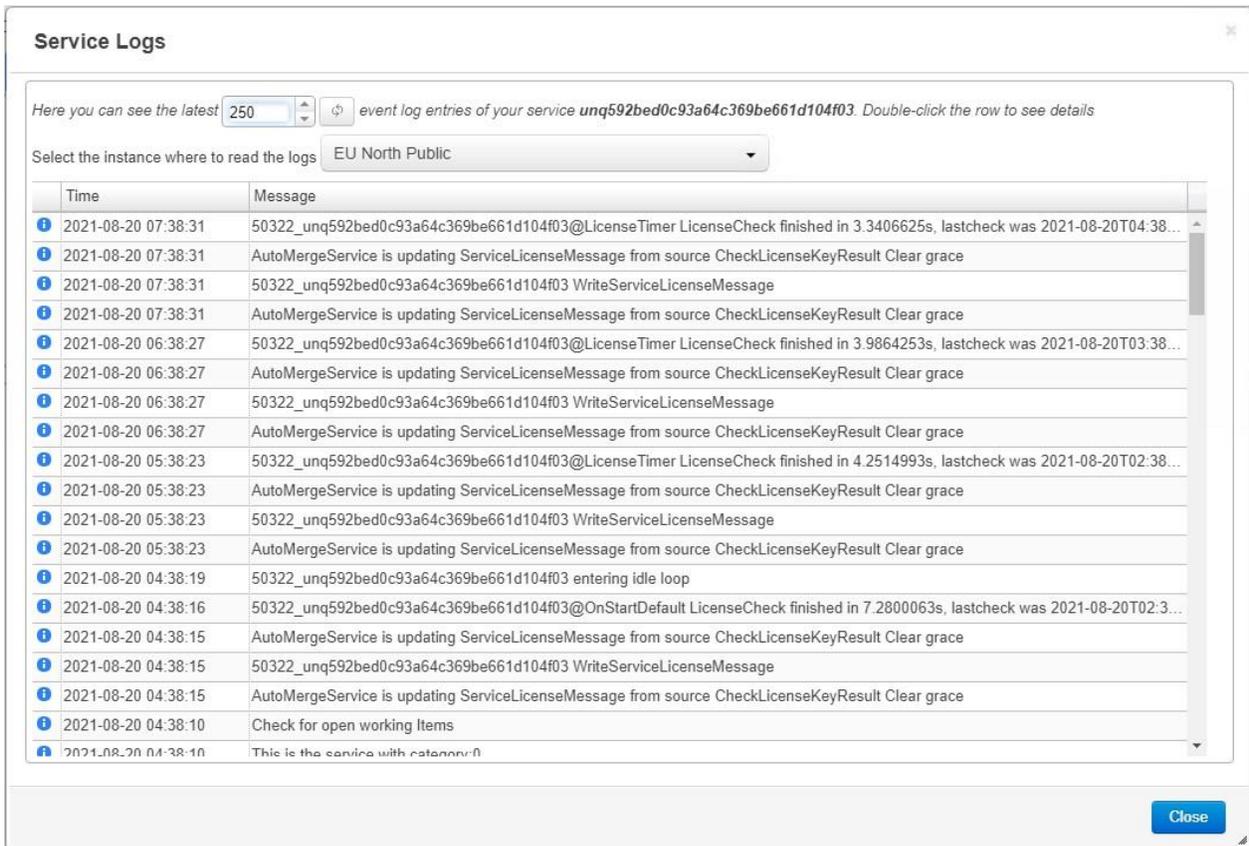
Licenseinformation	Systemvalue	Status
LicenseState	trial	⚠

Clear License Cache
Close

Figure 8: License-info for DCP

5. VIEW SERVICE LOGS

See the latest event log entries of your service.



The screenshot shows a window titled "Service Logs" with a close button in the top right corner. Below the title bar, there is a text area that reads: "Here you can see the latest 250 event log entries of your service unq592bed0c93a64c369be661d104f03. Double-click the row to see details". Below this is a dropdown menu labeled "Select the instance where to read the logs" with "EU North Public" selected. The main area contains a table with two columns: "Time" and "Message". The table lists 20 log entries, each starting with a blue information icon. The messages include license check completion times, service updates, and idle loop entries. A "Close" button is located at the bottom right of the window.

Time	Message
2021-08-20 07:38:31	50322_unq592bed0c93a64c369be661d104f03@LicenseTimer LicenseCheck finished in 3.3406625s, lastcheck was 2021-08-20T04:38...
2021-08-20 07:38:31	AutoMergeService is updating ServiceLicenseMessage from source CheckLicenseKeyResult Clear grace
2021-08-20 07:38:31	50322_unq592bed0c93a64c369be661d104f03 WriteServiceLicenseMessage
2021-08-20 07:38:31	AutoMergeService is updating ServiceLicenseMessage from source CheckLicenseKeyResult Clear grace
2021-08-20 06:38:27	50322_unq592bed0c93a64c369be661d104f03@LicenseTimer LicenseCheck finished in 3.9864253s, lastcheck was 2021-08-20T03:38...
2021-08-20 06:38:27	AutoMergeService is updating ServiceLicenseMessage from source CheckLicenseKeyResult Clear grace
2021-08-20 06:38:27	50322_unq592bed0c93a64c369be661d104f03 WriteServiceLicenseMessage
2021-08-20 06:38:27	AutoMergeService is updating ServiceLicenseMessage from source CheckLicenseKeyResult Clear grace
2021-08-20 05:38:23	50322_unq592bed0c93a64c369be661d104f03@LicenseTimer LicenseCheck finished in 4.2514993s, lastcheck was 2021-08-20T02:38...
2021-08-20 05:38:23	AutoMergeService is updating ServiceLicenseMessage from source CheckLicenseKeyResult Clear grace
2021-08-20 05:38:23	50322_unq592bed0c93a64c369be661d104f03 WriteServiceLicenseMessage
2021-08-20 05:38:23	AutoMergeService is updating ServiceLicenseMessage from source CheckLicenseKeyResult Clear grace
2021-08-20 04:38:19	50322_unq592bed0c93a64c369be661d104f03 entering idle loop
2021-08-20 04:38:16	50322_unq592bed0c93a64c369be661d104f03@OnStartDefault LicenseCheck finished in 7.2800063s, lastcheck was 2021-08-20T02:3...
2021-08-20 04:38:15	AutoMergeService is updating ServiceLicenseMessage from source CheckLicenseKeyResult Clear grace
2021-08-20 04:38:15	50322_unq592bed0c93a64c369be661d104f03 WriteServiceLicenseMessage
2021-08-20 04:38:15	AutoMergeService is updating ServiceLicenseMessage from source CheckLicenseKeyResult Clear grace
2021-08-20 04:38:10	Check for open working Items
2021-08-20 04:38:10	This is the service with category 0

Figure 9: Service Logs

6. VIEW DOC STATISTICS

Have a look at the statistical data related to the documents created with the DocumentsCorePack Online Service.

The screenshot displays the 'Service Logs' window. At the top, it indicates that 250 event log entries are visible for the service `unq592bed0c93a64c369be661d104f03`. Below this, a table lists log entries with columns for 'Time' and 'Message'. A modal window titled 'Service Log Detail' is open, showing the full message for the selected entry: `50322_unq592bed0c93a64c369be661d104f03@LicenseTimer LicenseCheck finished in 2.7313566s, lastcheck was 2021-08-20T05:38:31.7818927Z`. The background table shows alternating messages from `50322_unq592bed0c93a64c369be661d104f03` and `AutoMergeService is updating Serial Instance Message from source. Check Instance Availability`. A 'Close' button is located at the bottom right of the window.

Time	Message
2021-08-20 08:38:34	50322_unq592bed0c93a64c369be661d104f03@LicenseTimer LicenseCheck finished in 2.7313566s, lastcheck was 2021-08-20T05:38:31.7818927Z
2021-08-20 08:38:34	AutoMergeService is updating Serial Instance Message from source. Check Instance Availability
2021-08-20 08:38:34	50322_unq592bed0c93a64c369be661d104f03@LicenseTimer LicenseCheck finished in 2.7313566s, lastcheck was 2021-08-20T05:38:31.7818927Z
2021-08-20 08:38:34	AutoMergeService is updating Serial Instance Message from source. Check Instance Availability
2021-08-20 07:38:31	50322_unq592bed0c93a64c369be661d104f03@LicenseTimer LicenseCheck finished in 2.7313566s, lastcheck was 2021-08-20T04:38:31.7818927Z
2021-08-20 07:38:31	AutoMergeService is updating Serial Instance Message from source. Check Instance Availability
2021-08-20 07:38:31	50322_unq592bed0c93a64c369be661d104f03@LicenseTimer LicenseCheck finished in 2.7313566s, lastcheck was 2021-08-20T04:38:31.7818927Z
2021-08-20 07:38:31	AutoMergeService is updating Serial Instance Message from source. Check Instance Availability
2021-08-20 06:38:27	50322_unq592bed0c93a64c369be661d104f03@LicenseTimer LicenseCheck finished in 2.7313566s, lastcheck was 2021-08-20T03:38:31.7818927Z
2021-08-20 06:38:27	AutoMergeService is updating Serial Instance Message from source. Check Instance Availability
2021-08-20 06:38:27	50322_unq592bed0c93a64c369be661d104f03@LicenseTimer LicenseCheck finished in 2.7313566s, lastcheck was 2021-08-20T03:38:31.7818927Z
2021-08-20 06:38:27	AutoMergeService is updating Serial Instance Message from source. Check Instance Availability
2021-08-20 05:38:23	50322_unq592bed0c93a64c369be661d104f03@LicenseTimer LicenseCheck finished in 2.7313566s, lastcheck was 2021-08-20T02:38:31.7818927Z
2021-08-20 05:38:23	AutoMergeService is updating Serial Instance Message from source. Check Instance Availability
2021-08-20 05:38:23	50322_unq592bed0c93a64c369be661d104f03@LicenseTimer LicenseCheck finished in 2.7313566s, lastcheck was 2021-08-20T02:38:31.7818927Z
2021-08-20 05:38:23	AutoMergeService is updating Serial Instance Message from source. Check Instance Availability
2021-08-20 04:38:19	50322_unq592bed0c93a64c369be661d104f03@LicenseTimer LicenseCheck finished in 2.7313566s, lastcheck was 2021-08-20T01:38:31.7818927Z
2021-08-20 04:38:16	50322_unq592bed0c93a64c369be661d104f03@OnStartDefault LicenseCheck finished in 7.2800063s, lastcheck was 2021-08-20T02:38:31.7818927Z
2021-08-20 04:38:15	AutoMergeService is updating Serial Instance Message from source. Check Instance Availability

Figure 10: Doc statistics

7. VIEW VERSION INFO

A click on this button opens the *Version Information* window. Here, you get an overview on your license. With a click on the **[Reinstall/Upgrade]**-button, you can as well reinstall or upgrade your license.

Document Service Version	2020.95
Management Service Version	2020.10
CRM Version	9.2.21072.143

Installed CRM Solutions	Latest Version	Installed Version
AutoMergeGlobalButton	2020.119	2020.119
AutoMergeServerCore	2020.95	2020.95
DocumentsCorePackServerCore	2020.2	2020.2
MSCRMADDONScmGeneral	2020.44	2020.44

Import solutions synchronous

Reinstall/Upgrade

Figure 11: Version Information

8. STOP AND START SERVICE

Click on the **[Start]**-button (triangle) in order to start the service.



Usually, there is no need to start the DocumentsCorePack Online Service because the service is running automatically, once it has been configured.

9. VIEW DATA USAGE REPORT

A click on this button opens the data usage report, which provides you with your monthly used data volume.



Month	Data Usage	Generated Documents
-------	------------	---------------------

Figure 12: Data Usage Report

10. IMPORT/EXPORT DOCUMENTSCOREPACK TEMPLATES

This Template Management window opens Where you can

- Import DocumentsCorePack Templates: Here, you will be asked to specify how to proceed with the templates you import, but that already exist in the system. You have the possibility to select between the following three options:
 - **Overwrite** - The template GUID stays the same.
 - **Import the new version** - The 'old' version will be kept with the 'old' template GUID and the 'new' version of the template will be imported with a 'new' template GUID.
 - **Ignore** - All existing templates will be ignored. Only new templates will be imported.
- Export DocumentsCorePack Templates as *.zip-files.
- Transfer DocumentsCorePack Templates to another organization
- Enable a Scheduled Template Backup to Azure Blob Storage

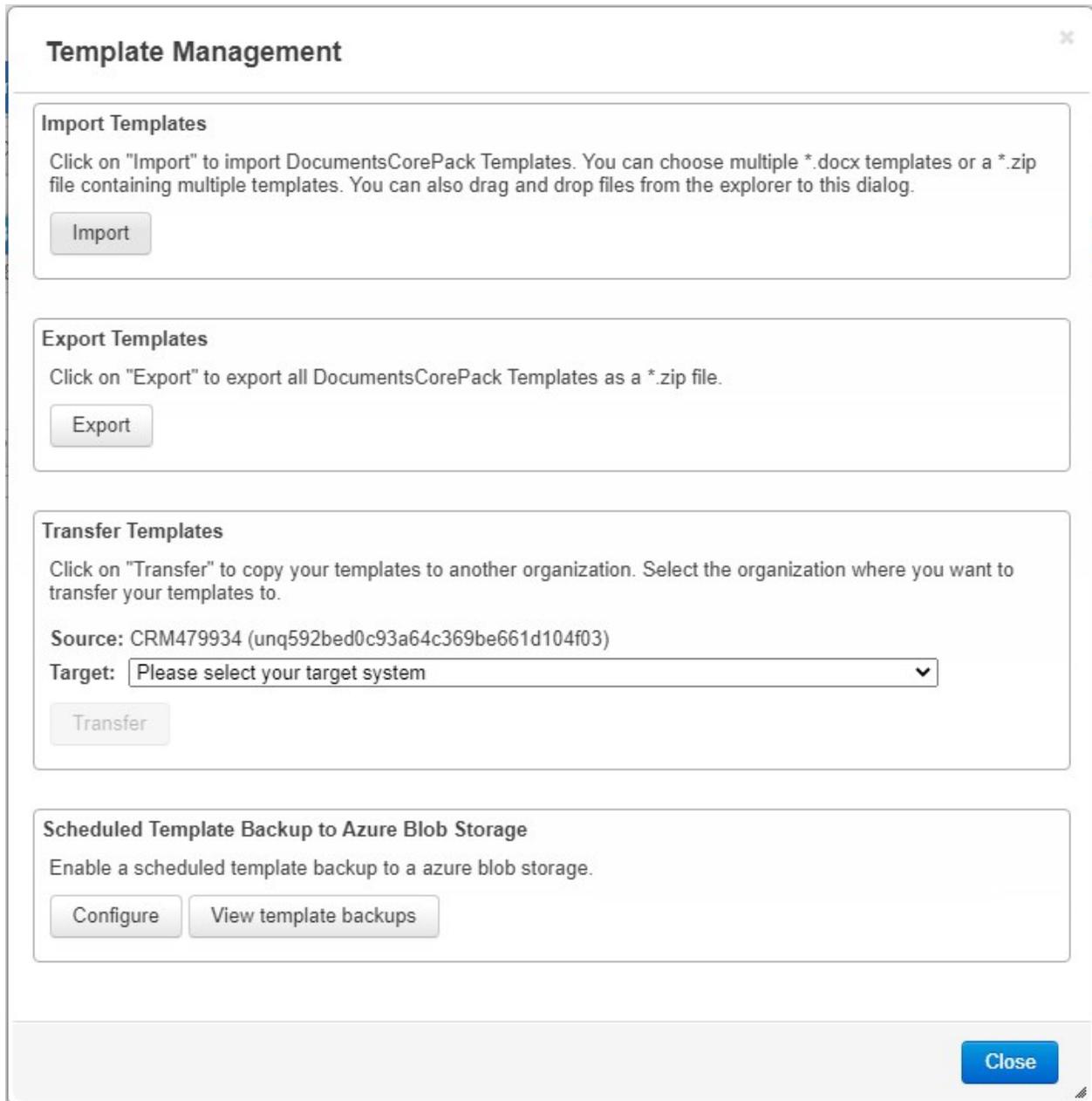


Figure 13: Template Management

11. MANAGE FONTS

If your templates are using fonts which are not installed by default, you may upload and install your fonts into your DCP instance with a click on the **[Upload Font]**-button.



Template Designers must generally be activated per user. Please find a brief description on how to do so in [CHAPTER 3.2, HOW TO ACTIVATE TEMPLATE DESIGNERS \(PER USER\) FOR DCP ONLINE ON PAGE 26.](#)

12. GET API KEY

Obtain the API key of your service here.

Figure 14: Obtain API key

1. MOVE/COPY THE INSTANCE

You can find it on the right of the settings bar.



Figure 15: Further DCP settings

With a click on this button, you can move the service to another instance. Simply select a certain instance from the list and click on the **[Move Service]**-button. Alternatively, you can also copy the service by clicking on the **[Copy Service]**-button.

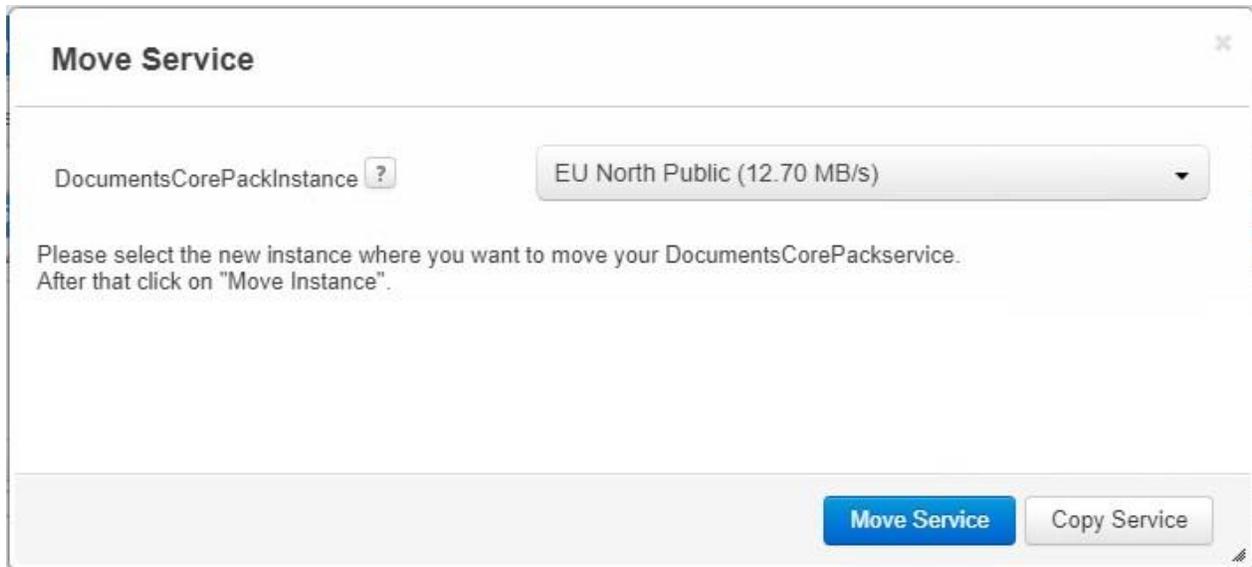


Figure 16: Move service

2. DELETE SERVICE

With a click on this button, you have the possibility to delete the service. Before the service is deleted, you will be provided with the *Delete Service*-window. Here, click on the **[Delete]**-button in order to delete the service or click on the **[Cancel]**-button in order to cancel.

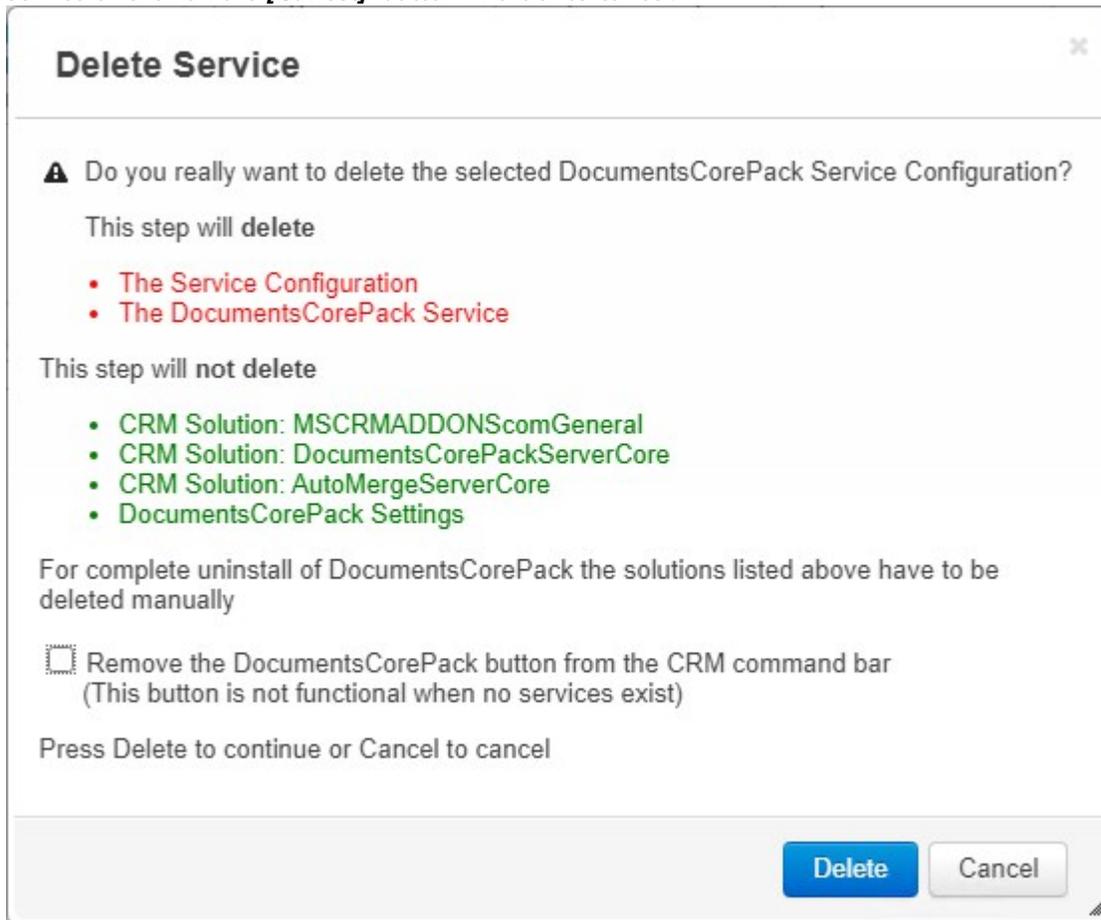


Figure 17: Delete service

2.2 The DocumentsCorePack Service Configuration surface

The DCP Online Service Configuration service helps you to create a new service. The surface is divided into two different parts – the basic and the advanced options.

2.2.1 The basic DocumentsCorePack configuration options

Using this section by pressing the **[+]**-button, you can configure the basic options of your service. In general, setting the basic options is enough to start a service.

Figure 18: DCP - basic configuration options

1. SET UP YOUR CRM CONNECTION

Set up a connection profile. Learn later more.

2. SERVICE NAME

Please enter your service name here. But choose wise because the name cannot be changed anymore!

3. DOCUMENTSCOREPACK INSTANCE

Please select the instance on which the service should be installed. The instance with the best bandwidth is automatically preselected, but you can change it until you have saved the new service.

4. JOB TYPE

Specify here which jobs should be processed by the service. Print Jobs, Document Generation jobs or both are selectable. When selecting Print Jobs only, you can apply a filter.

5. USE CRM INTEGRATED SHAREPOINT

Enable this setting when the documents should be stored in the CRM integrated SharePoint. Otherwise, the documents will be stored as note attachments.

6. SHOW ADVANCED OPTIONS

A click on this button expands some options for the advanced configuration



If you feel that the configuration so far satisfies your needs, you can save your service now with a click on the **[Save Service]**-button in the right lower corner. But of course, the service can as well be configured on an advanced level, which can be done in the Advanced Configuration-section. This optional part of the configuration will be explained in the next chapter.

2.2.2 The advanced DocumentsCorePack configuration options

Using this section, you can configure the advanced options of your service. They are optional.

Figure 19: Advanced Configuration options

1. PUSH REQUEST LOGIC

Specify which Push Request Logic should be used by the DCP Dialog.

2. ENABLE DEBUGGING

In case of any issues during the document generation, we would recommend you enable debugging here. The log files will be available as soon as the service is saved.

3. NOTIFY ON SERVICE CHANGES

Select this option to receive an e-mail every time there is a service change.

4. SHAREPOINT SINGLE LOCATION

Specify a SharePoint location for document edits even when no SharePoint integration is enabled within the CRM.

DocumentsCorepack Online Configuration for Dynamics 365.

5. FORCE THIS SERVICE TO BE THE ONLY DOCUMENT-GENERATING SERVICE

If you select this option, this will be the only service which processes your documents.

6. CATEGORY

Number category for prioritization. Required when using multiple services. Default is 0.

7. SERVER VERSION

This field informs you about the current DocumentsCorePack version of your instance.

8. SHOW EVEN MORE ADVANCED OPTIONS

A click on this button expands some options for the advanced configuration.



If you feel that the configuration so far satisfies your needs, you can save your service now with a click on the **[Save Service]**-button in the right lower corner. But of course, the service can as well be configured on an advanced level, which can be done in the Advanced Configuration-section. This optional part of the configuration will be explained in the next chapter.

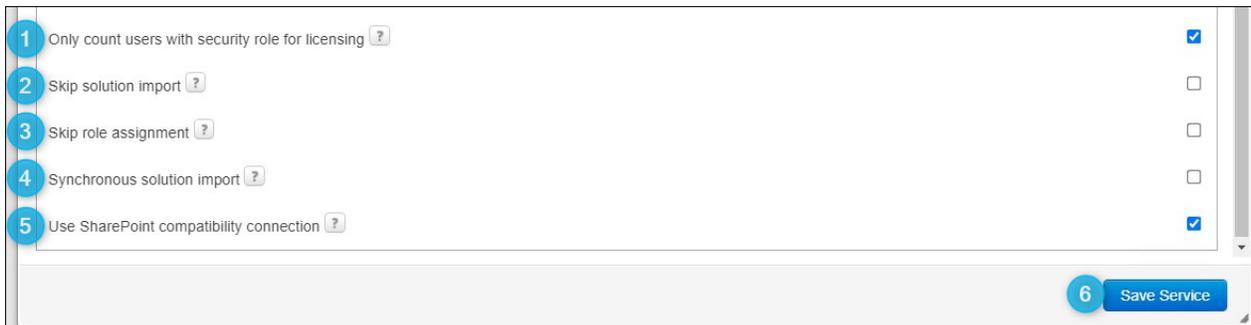


Figure 20: Show even more Advanced Options

1. ONLY COUNT USERS WITH SECURITY ROLE FOR LICENSING

This Feature was enabled to deal with a common issue that all users with an assigned Dynamics 365 will automatically become enabled users in every Dynamics 365 tenant and thus counts towards our license although the users have no access to the tenant. Once enabled our licensing will count users only if they have at least one security role assigned which is not the case for auto-signed users from the Office 365 Portal.

2. SKIP SOLUTION IMPORT

If you select this option, the setup will assume that you already import all of your solutions that are necessary for a creation of a service. if a particular solution is missing, the creation of the new service will fail.

3. SKIP ROLE ASSIGNMENT

If you select this option, you either have to create a custom role covering the required rights or you will have to manually assign the security roles.

4. SYNCHRONOUS SOLUTION IMPORT

If you select this option, the setup will try to import the solutions synchronously.

5. USE SHAREPOINT COMPATIBILITY CONNECTION

If you use this option a compatibility SharePoint connection will be used.

6. SAVE SERVICE BUTTON

It is necessary to press this button in order to save your configurations!

3 Tutorials (“How To’s”)

This chapter provides you with helpful tutorials that show you how to work with the Online Configuration efficiently.

3.1 How to create a CRM connection profile

Before you can setup a service, you must create a CRM connection profile. Please follow the below step-by-step tutorial in order to start an Online Service properly.

3.1.1 Step 1: Open the Online Configuration Service

Please follow the steps in [CHAPTER 1.1, HOW TO START THE ONLINE CONFIGURATION](#) to open the Online Configuration properly.

3.1.2 Step 2: Setup a connection profile

If you already have a connection profile, you can skip this step and continue with creating a service for DocumentsCorePack or AttachmentExtractor. You will find a detailed description of this in the following chapters.

- 1 Select your connection type. For the online service it is Server2Server.
- 2 Type in your CRM URL
- 3 Press the **[Retrieve Organizations]**-button

Create CRM connection profile

i You have to specify a valid CRM connection profile. The user with which you're connecting must be in the system administrator role to set up a service.

- 1 Select your connection type
Server2Server | App Access | App Access (custom) | IFD (hosted)
- 2 CRM URL
org9434d7a7.crm4.dynamics.com
- 3 Retrieve Organizations

Figure 21: Set up your CRM Connection

You will be asked to log in. Use an account with administrative rights.

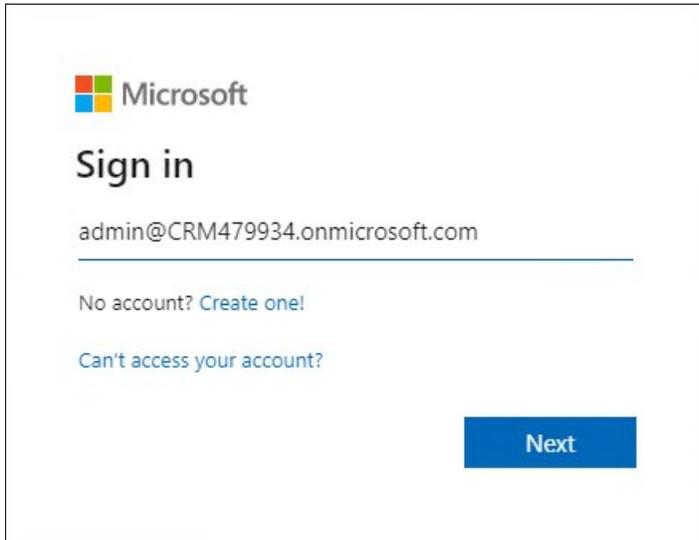


Figure 22: Log in

3.1.3 Step 3: Verify your connection

As soon as your organization appears in the Available Organizations section, click on the **[Verify Connection & Save Profile]**-button.

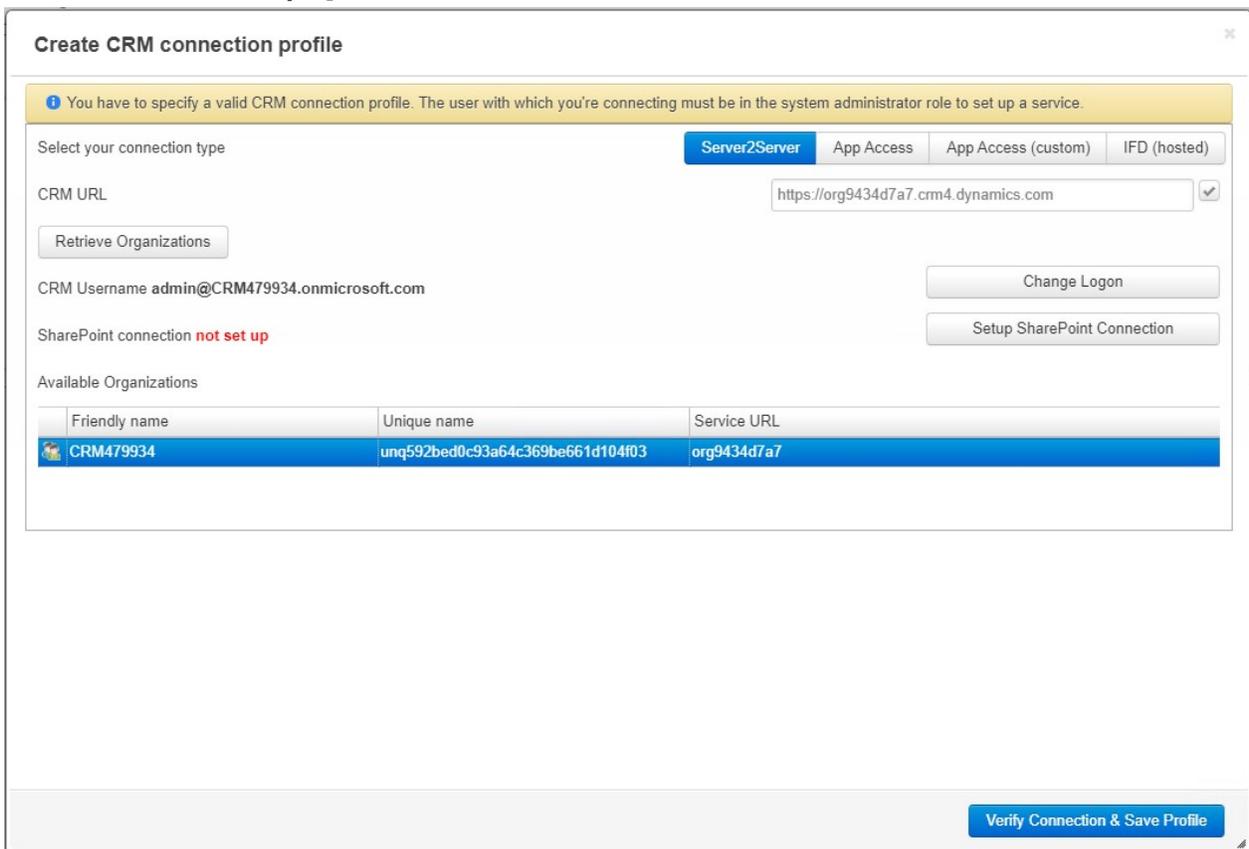


Figure 23: Retrieved Organizations

The following message appears.



It is of utmost importance that you do not close this window or navigate away. It can take a few minutes to verify the connection.



Figure 24: Verify connectivity and permissions

After the connection is verified, this window is shown. Please press the **[Save Service]**-button to finish this process.

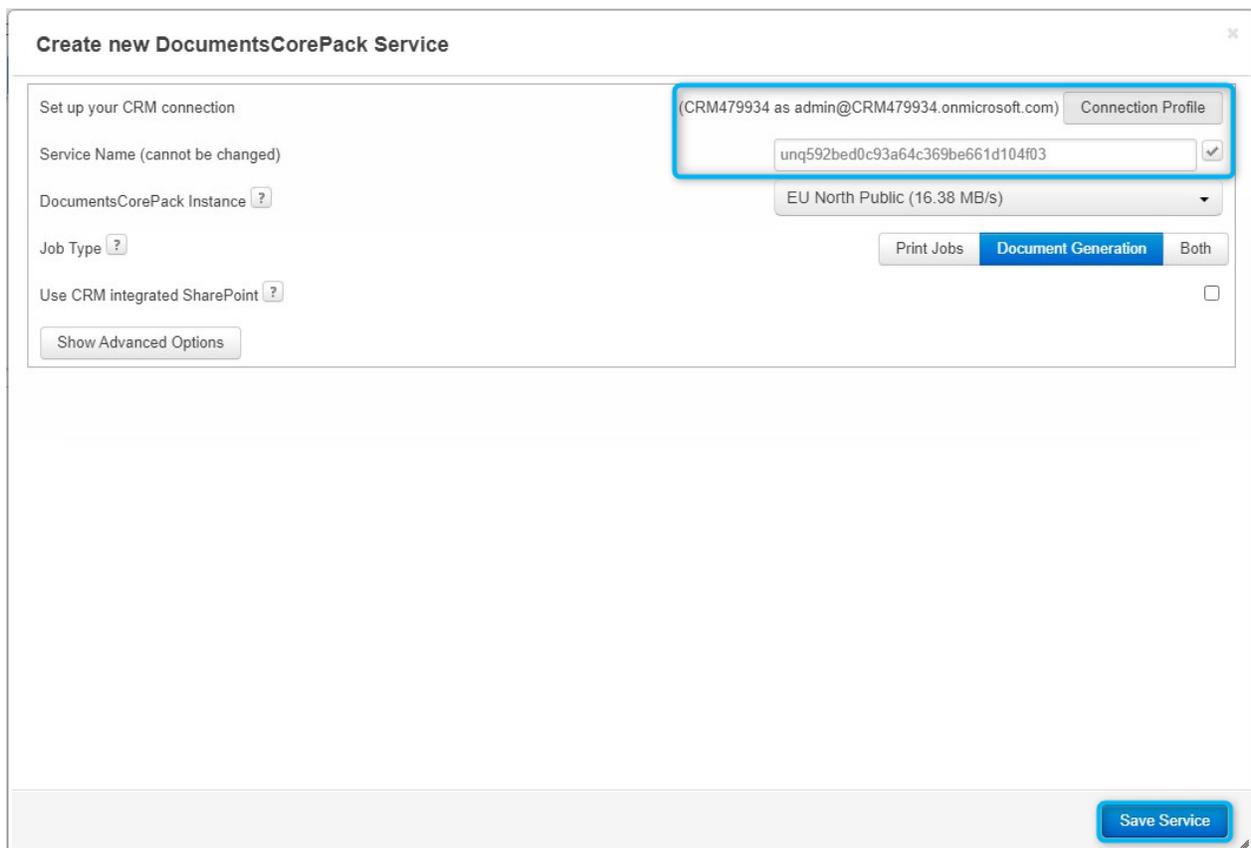


Figure 25: Verified connection

Confirm with **[OK]** and wait until your service is saved. Please do not close this window or navigate away, otherwise your connection will fail. It is a good time for a little break. Enjoy some coffee.

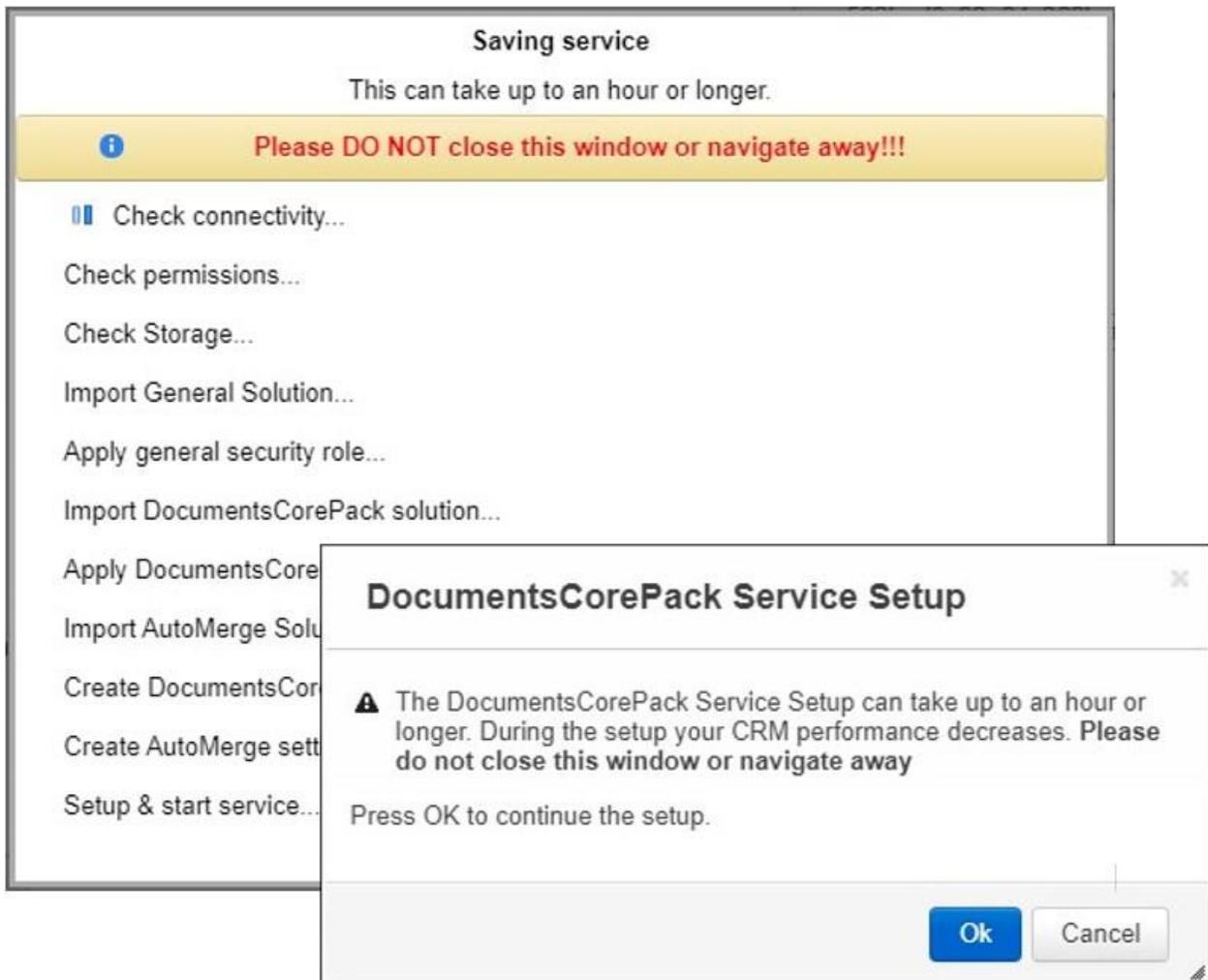


Figure 26: Saving service

3.1.4 Step 7: Service Configuration Completed

As soon as the service configuration is completed, you will be informed about the next steps you can take.

3.1.5 Step 8: Watch your service running

Congratulation! You have finished the configuration of your service. You are now redirected to the service configuration overview. Other than AttachmentExtractor, the DocumentsCorePack service is already running. Using the buttons at the end of the service overview, you can define which steps you would like to take next.

3.2 How to activate Template Designers (per user) for DCP Online

Template Designers must generally be activated per user before you can use it.

3.2.1 Step 1: Select a service

Please navigate to our website www.mscrm-addons.com and after the login, navigate to “My Account” > “My Cloud Services” to activate the Template Designers per users for DocumentsCorePack Online. Select the desired service and click on the **[View and install License]**-button.

The screenshot shows the mscrm-addons.com website. The top navigation bar includes links for HOME, PRODUCTS, PRICING, DOWNLOADS, ABOUT US, SUPPORT, and MY ACCOUNT. The main content area is titled "My Account Overview" and features four service cards: "my cloud services" (highlighted with a blue border), "OnlineShop", and "Downloads". Below the "my cloud services" card, a modal window is open, displaying a table of "Your available DocumentsCorePack services". The table has the following data:

ID	Name	Status	Job Type	Data (this m...	Organization	CRM	Instance
37...	unq592bed0c93a64c369be661d10...	Running	Document G...	0 B	CRM479934	https://org9434d7a7.crm4.d...	https://autom...
37...	unq5f4e519c608d4307a7e2d7024...	Running	Document G...	0 B	CRM614680	https://org0f6f8b03.crm4.dy...	https://autom...

The modal window also includes a search bar, a toolbar with various icons (including a blue box around the "View and install License" icon), and a footer with version information: "Version 2020 08 7898 27199".

Figure 27: Install license for DCP

3.2.2 Step 2: Select a user

To select a user, please click on the **1** [Client Based License]-tab and on the **2** [Please click here to select the user...]-button.



The number of licenses depends on which [DocumentsCorePack package](#) you are working with. If you want to change the **3** Subscription ID, it is recommended to send an e-mail to support@mscrm-addons.com.

License

Server Based License **Client Based License** Users

1 Please click here to select the user which should be assigned for the DocumentsCorePack perUser license

2 DCP Client Based Subscription ID: -1. Please click here to change the subscription ID

3

Licenseinfo for DocumentsCorePack for Dynamics 365

Licenseinformation	Licensevalue	Systemvalue	Status
Licensemodel	perUser		!
Licensekey	Xj+uuMMHdxU5TNzdx6/eaqI8HDbI	Licensekey installed	!
Licenseinformation	Licensevalue	Systemvalue	Status
BusinessUnit	unq592bed0c93a64c369be661d104f03	unq592bed0c93a64c369be661d104f03	✓
Userinformation	fullAccess	accessPossible	✓
Number of user licenses	1	1	✓
Licenses for Readonly Users	0	0	✓
Expiration	12/10/2021 12:00:00 AM	108 days left	✓
Support	12/10/2021 12:00:00 AM	108 days left	✓
Issued product	DocumentsCorePack	DocumentsCorePack	✓
Version upgrade covered till	12/10/2021 12:00:00 AM	1/1/0001 12:00:00 AM	✓
Licenseinformation	Licensevalue	Systemvalue	Status
LicenseState		valid	✓

Clear License Cache Close

Figure 28: Assign user for DCP perUser license



Do not activate more users than your license covers!

In this window you can see your available licenses and please select the users which should be able to use DocumentsCorePack. The Status also shows you, that your user is not assigned already. Press the **[Apply]**-button.

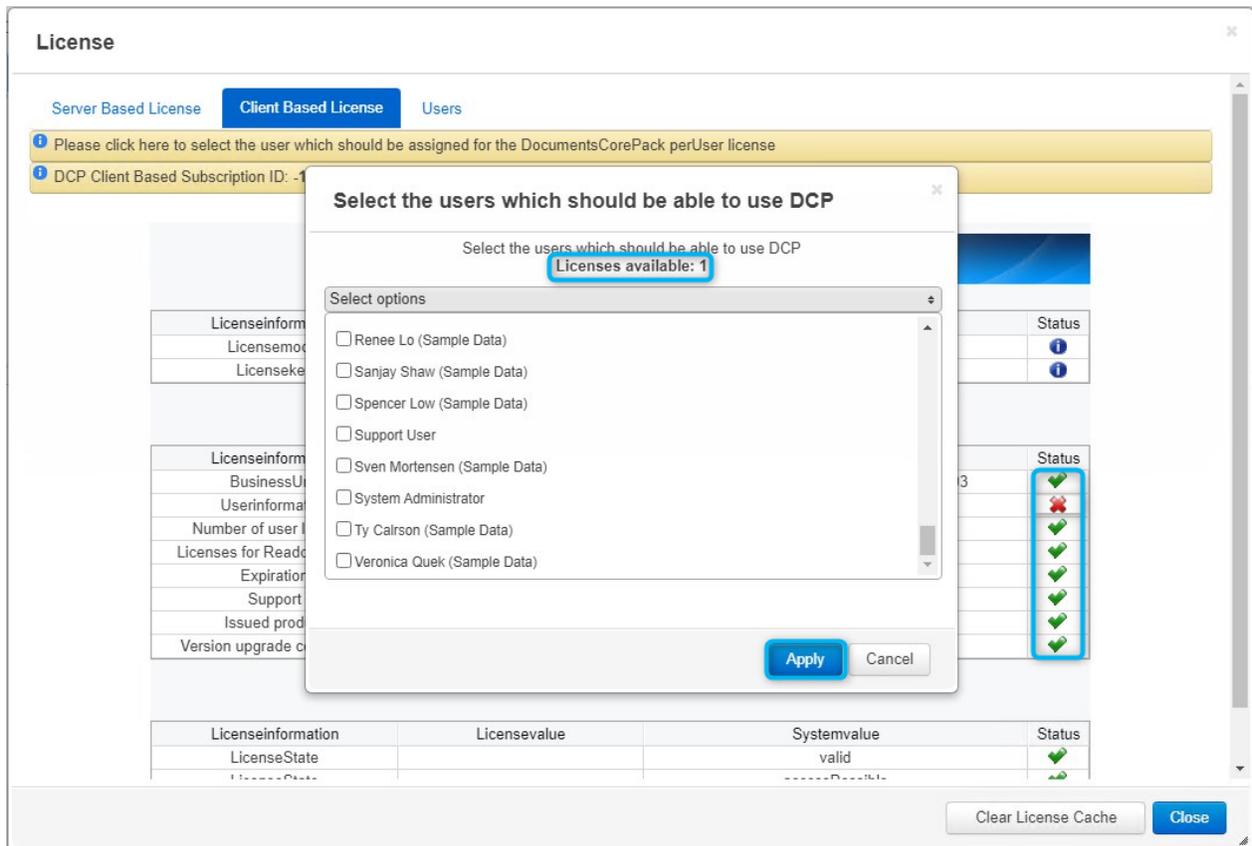


Figure 29: Assign a user

You can now see that the license has been assigned to the user and the Status is green.

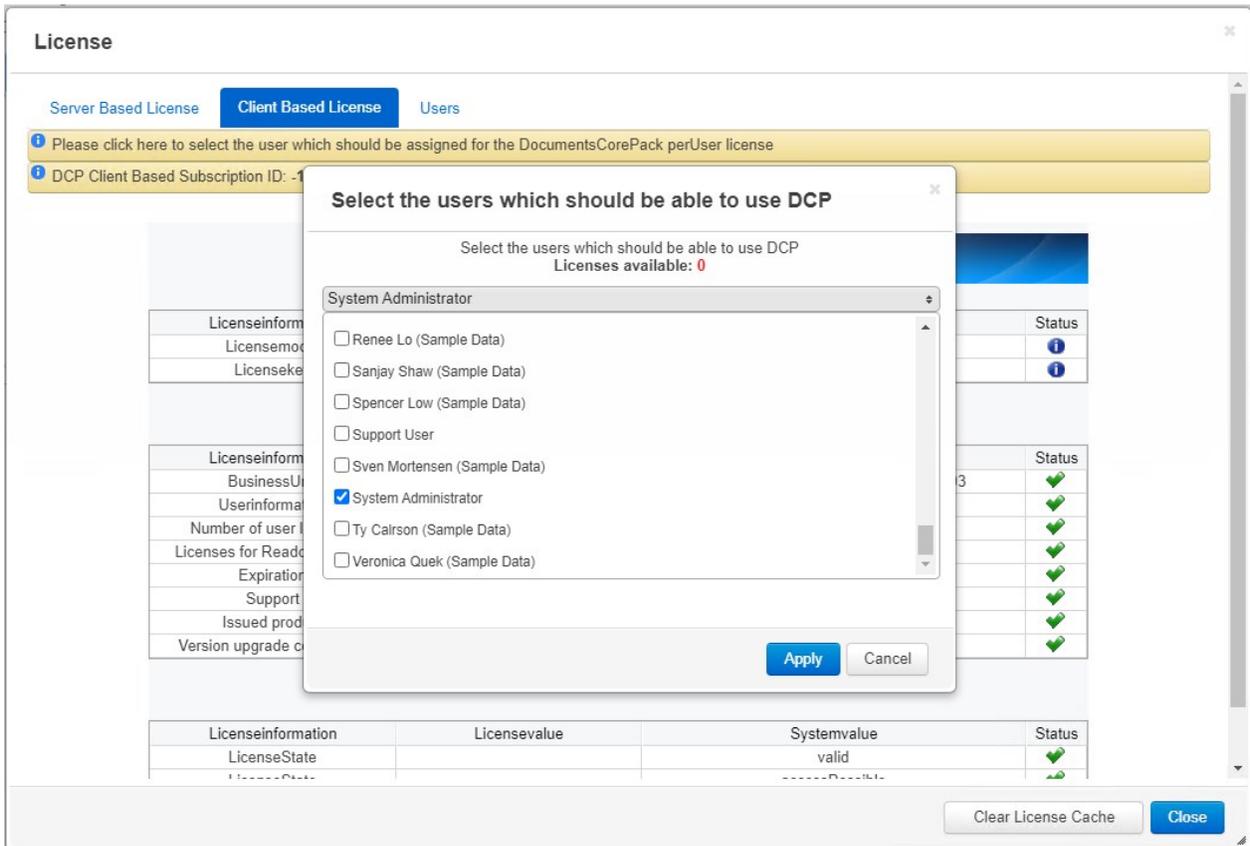


Figure 30: Finish process assign a user

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5. Contact

For further technical questions, please visit our blog <http://blogs.mscrm-addons.com> or contact support@mscrm-addons.com.

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