DocumentsCorePack vs. Out-of-the-box Dynamics 365

Microsoft Dynamics 365 CE comes with a basic functionality to generate documents via Word templates.

This overview provides a comparison of those native capabilities vs. DocumentsCorePack for Dynamics 365 and Power Apps. Starting with key differences you will find a detailed comparison covering:

- Document Generation
- Document Processing & Delivery
- Template Design & Management

The intent of this head-to-head comparison to help you determine which option is best to meet your document design, generation, processing, and automation requirements.

Key Differences	DocumentsCorePack	Native Dynamics 365
Microsoft Word based Template Designer (See Template Design Comparison for details)	✓ Easy to use Word Add-In	✓ XML-based mapping via developer ribbon
Mapping of Dataverse data: - Resolve relationships - Filter results - Sort results - Formatting (e.g. date, money values)	Multi-level ✓ ✓ ✓	limited to 1 level ✗ ✗ ✗
Connector for Power Automate & Power Apps - Full document automation via Flows - Document generation & processing in Canvas Apps	✓ ✓	✗
One-Click document processes Generate and process documents according to your business needs with a single click	✓ All document generation & processing options	✓ Only in Sales App Limited to PDF files
Batch document generation & delivery - Load Balancing to ensure high performance	✓ ✓	✗ ✗
Template management - Test templates during the design - Versioning & History - Conditional template selection - Guided provisioning between environments - Customizable sample templates	✓ ✓ ✓ ✓ ✓	✗

Any questions?
Do not hesitate to contact us

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Document Generation

Whether you need to send sales or service documents, internal reports or contracts for signature, documents are crucial in every business. Generating professional documents in a simple, streamlined, and effective manner is a top priority.

In this section we compare the document generation options provided by the two solutions within the suite of Microsoft Business Applications:

Document Generation	DocumentsCorePack	Native Dynamics 365
Available in - Dynamics 365 CE - Model Driven Power Apps - Power Automate (Microsoft Flow) - Canvas Apps	✓ ✓ ✓ ✓	✓ ✓ ✗ ✗
Command bar dialog	All Dynamics 365 CE & Model Driven Apps	Only in Sales App, limited to PDF files
One-Click Actions - Generate documents - Process documents - Review & edit documents - Access Control (via Security Roles, Teams)	✓ ✓ ✓ ✓	✓ Only in Sales App, limited to PDF files ✗ ✗
Conditional template selection	✓	✗
Supported file types	.docx,.pdf,.html, .txt,...	.docx,.pdf
Batch operations - Batch document generation - Batch document processing	 ✓ ✓	✗
Generate documents consisting of multiple elements from different sources	Combine templates, SharePoint & Note documents	✗
Dynamic document names & properties	✓	✗
Use data from an external database	✓	✗
Use data from inspection reports (JSON)	✓	
Incorporate user input during document creation	✓	✗
Document preview	✓	Only in Sales App
Edit documents upon creation before processed	✓ In MS Word, the defined process continues	✓ In MS Word, manual processing required

Document Processing, Delivery & Automation

Every document generated has a purpose. Thus, providing options to process & deliver documents will not just speed up your document-related business processes, reduce your user's workload but also bridge the gap to full document automation.

This section outlines the comparison of options to process, deliver & automate your documents:

Document Processing & Delivery	DocumentsCorePack	Native Dynamics 365
Generate email attachments	✓	Only in Sales App, limited to PDF files
Generate email content	✓	✗
Generate and attach to activity	All activity types	✗
Attach as a note	✓	Only in Sales App, limited to PDF files
Save to SharePoint - Dynamic save locations - Create SharePoint locations - Write metadata to SharePoint	All file types ✓ ✓ ✓	Only in Sales App, limited to PDF files ✗ ✗ ✗
Send for e-Signing - Adobe Sign - DocuSign - AssureSign	 ✓ ✓ ✓	✗
Protect files (PDF & password protection)	✓	✗
Run processes upon document generation - Flows - Workflows/Actions	 ✓ ✓	✗
Printing - Local/Network printing - Cloud printing	 ✓ ✓	✗
Combine documents	✓	✗

Document Automation	DocumentsCorePack	Native Dynamics 365
Via Dynamics 365 workflows	✓ All document generation & processing options	✓ Only attach as note
Via Power Automate	✓ DocumentsCorePack Connector	✗

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Template Design

„Using the power of MS Word" is key in enabling every user to design good-looking and professional documents. This section compares the features & options to map the data you need from Microsoft Dataverse into your documents:

Template Design	DocumentsCorePack	Native Dynamics 365
Microsoft Word Template Designer	✔ via Word Add-In	✔ Via developer ribbon
Relationships		
- One-to-Many, Many-to-One, Many-to-Many	✔	✔
- Multiple levels	✔	✖
- Filter & sort related records	✔	✖
- Unlimited number of related records	✔	✖ limited to 100
Data Manipulation		✖
- Grouping	✔	
- Calculations	✔	
- String manipulation	✔	
- User Prompts	✔	
Conditions & conditional content (if / else)	✔ Condition Designer	✔ Word Field Function
Formatting of Dataverse data		✖
- Field-type specific formatting (e.g. date, money fields)	✔	
- Conditional Formatting	✔	
Dynamic Images		
- Entity images	✔	✔
- Images from notes (stored in Dataverse)	✔	✖
- Images from URL (stored in Dataverse)	✔	✖
Dynamic Content		✖
- Charts (presenting Dataverse data)	✔	
- Document name	✔	
- Hyperlinks	✔	
- QR Codes	✔	
- HTML (stored in Dataverse)	✔	
e-Signature: Predefine tags for		✖
- AdobeSign	✔	
- DocuSign	✔	
- AssureSign	✔	
Work with Sample Data	✔	✖
Embed data from Inspection Reports (JSON)	✔	
Template Management	DocumentsCorePack	Native Dynamics 365
- Testing templates while designing	✔	✖
- Template versioning	✔	✖
- Template history (revisions)	✔	✖
- Guided Transfer between environments	✔	✖
- Template reporting & utilization statistics	✔	✖