



mscrm-addons.com
Your company for MS-CRM ADD-ONS!



www.mscrm-addons.com

PRODUCT CATALOGUE

2023

Content

DocumentsCorePack

Professional documents in Dynamics 365, Power Apps & Power Automate 3-7

AttachmentExtractor

Cost saving capacity management for Dynamics 365 & Power Apps 8-9

ActivityTools

Efficient activity management for Dynamics 365 & Power Apps 10

TelephoneIntegration

All-in-one call solution for Dynamics 365 & Power Apps 11

PowerSearch

Time saving search solution for Dynamics 365 & Power Apps 12

SmartBar

Fast and efficient navigation in Dynamics 365 & Power Apps 13

Partner Program

Working with partners is the key to success 14

References

What our customers say about our solutions 15-16

Microsoft
Partner



Gold Application Integration
Gold Application Development
Silver Cloud Platform

mscrm-addons.com is a trusted Microsoft Gold Partner specializing in solutions for Dynamics 365 and Power Platform. Our suite of customizable add-ons enhances user experience and productivity, helping organizations maximize their Dynamics 365 investment.

DocumentsCorePack

Simplify, optimize and automate your documents in Dynamics 365, Power Apps & Power Automate



With its user-friendly and powerful features, DocumentsCorePack simplifies, optimizes, and automates all your document processes. There are no limits to the document generation options. Easily create for example: business reports, financial statements, contracts, quotes, invoices or legal documents.

Suitable for every industry and department, our solution guarantees streamlined and professional document processes.

Create data-driven documents in 3 simple steps:

1. Design your templates in Microsoft Word

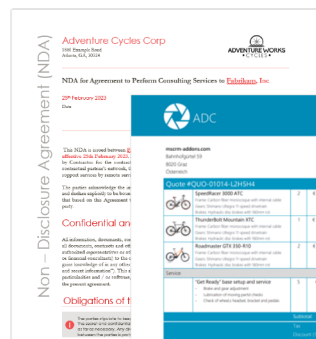
Easy, intuitive and powerful. No programming skills required.

2. Generate & deliver documents

Just a simple click, directly from the CommandBar.

3. Automate your documents

Connector with 25+ actions for Power Automate.



Template Design

Design your templates in Microsoft Word



Our powerful and user-friendly Template Designer makes it easy for anyone to create professional and attractive templates without any programming knowledge. The intuitive drag-and-drop interface is designed to work seamlessly within your familiar Microsoft Word environment.

With the ability to map fields from Microsoft Dataverse, you can easily access and incorporate any data you need for your documents. Plus, it allows for unlimited relationships, looping, sorting, filtering and many more features, making it a complete solution for automating and streamlining your document creation process.



Support for **all relationship types** in Microsoft Dynamics 365, with **no restrictions on the number of relationships or levels**. Easy handling of one-to-many and many-to-many relationships, including looping of records, grouping, and calculations within tables.



Seamless integration with **e-signature** solutions like DocuSign, AdobeSign and AssureSign, which permit the configuration of e-signature fields directly in the generated templates and initiate e-signature process.



Define **conditional content** based on field values in Dynamics 365



Creativity is the limit: insert **images, QR codes, charts** to **embedding other documents** into the main document, e.g. product spec-sheets and much more...

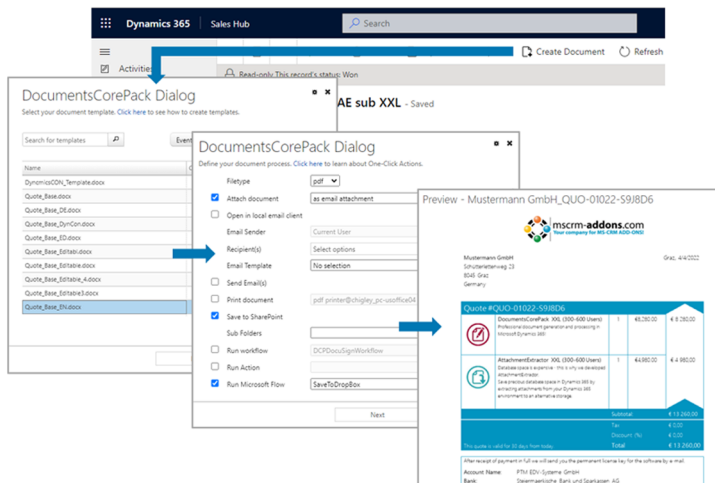
Document Generation

Generate and deliver documents from Dynamics 365 & Model Driven Apps



DocumentsCorePack allows for the efficient creation and delivery of individual or batch documents in a variety of formats directly from the Command Bar.

Utilizing the options available through our DocumentsCorePack dialog can streamline your document generation processes and ease the workload for your users.



Integrated into the **CommandBar**, our wizard guides the user through the document process.



Deliver your documents by **attaching it to an e-mail**, **printing** (local and cloud), **saving to SharePoint**, or via **Flows** (Power Automate).



Streamlining of document processes by combining multiple actions, like "create, send by e-mail and save to SharePoint" **into a single click** for your users.

Document Automation

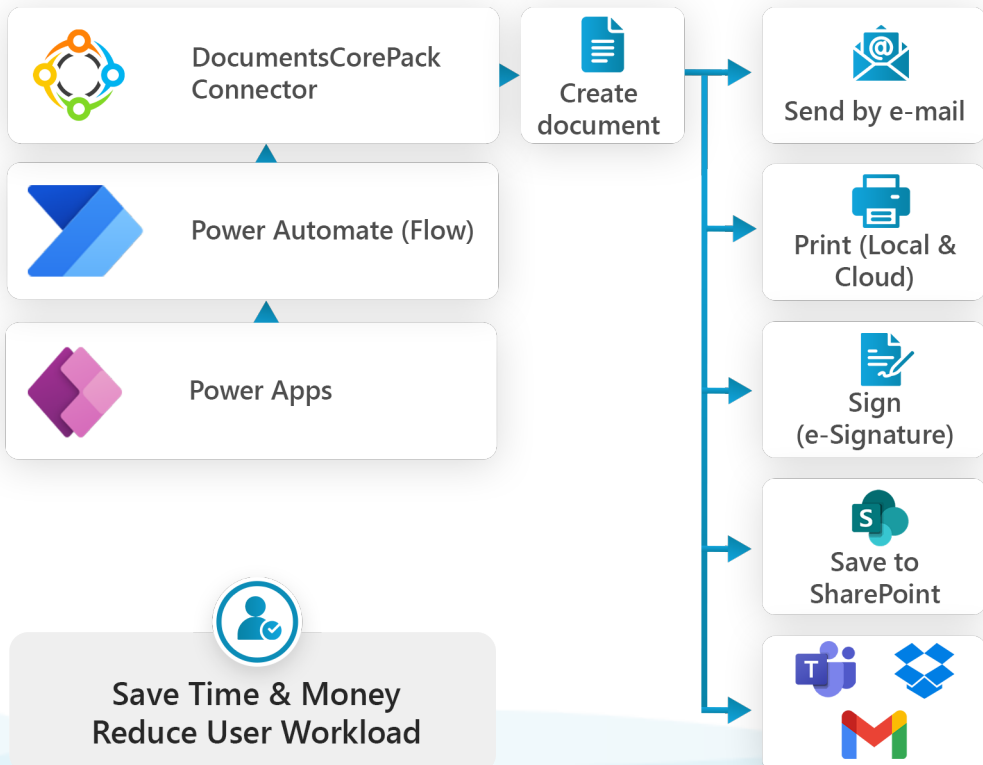
Automate your documents with the Connector



The DocumentsCorePack Connector enables full document automation by allowing the use of the complete document generation and delivery features within Power Automate (Flow) or classic Dynamics 365 workflows.



Our Connector supports **more than 25 actions** that can be integrated into your flow, including: Creating a document, printing, saving to SharePoint, attaching to a note or e-mail, and many more.



Comparison Chart

DocumentsCorePack vs. Native Dynamics 365



DocumentsCorePack



Out-of-the-Box D365

Microsoft Word-based Template Designer



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)
- JSON data

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



Template management:

- Test templates during the design
- Versioning & History
- Conditional template selection
- Guided provisioning between environments



AttachmentExtractor

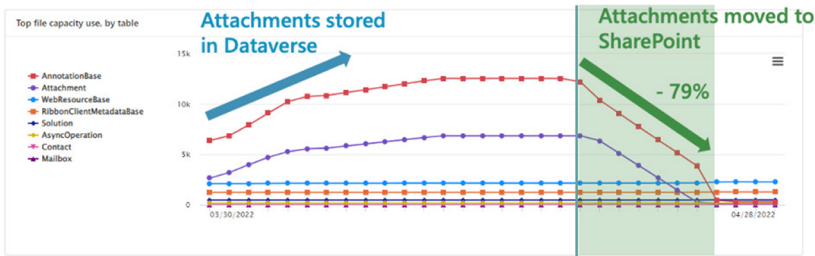
Cost saving capacity management for Dynamics 365 & Power Apps



Every company faces a common challenge: - e-mail attachments consume significant amounts of file storage, leading to expensive purchases of Capacity Add-Ons and difficulty in locating attachments.

AttachmentExtractor offers a cost-effective solution by automatically extracting e-mail & note attachments to inexpensive storage platforms like SharePoint or Azure Blob, without affecting the user experience. This saves up to 80% on file capacity costs while leaving the user experience unchanged.

Save money by reducing file capacity on the Power Platform!



After the AttachmentExtractor service is activated, you'll notice a **substantial reduction in your capacity usage**. For instance, a decrease in file capacity (including Attachments and AnnotationBase) by 126 GB can result in annual cost savings of \$2,712.



**Avoid expensive
Capacity Add-Ons**



**Unchanged
User Experience**

User-focused Features

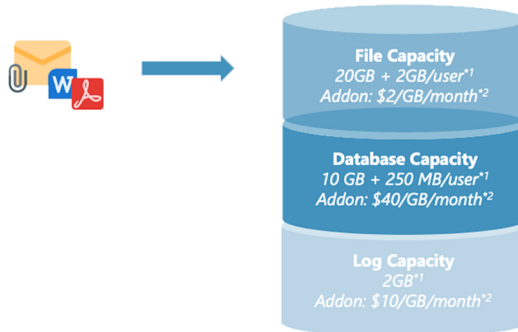


Attachment management tailored to your demand

AttachmentExtractor streamlines the extraction process of large files with its smart file size logic, ensuring swift extraction and instant capacity optimization.

Our solution offers the flexibility to configure preferences for e-mail handling, allowing you to specify particular tables (Whitelist) to focus on or exclude from the service's operations. You can activate the service at specific times, such as extracting attachments exclusively during weekends or limiting extraction to the time frame between e.g. midnight and 5 am.

These versatile features empower users to efficiently manage their e-mail attachments while tailoring the tool to their specific needs and preferences.



When users access their e-mails or notes, they won't notice any changes. AttachmentExtractor operates **in the background**, handling the extraction process seamlessly.



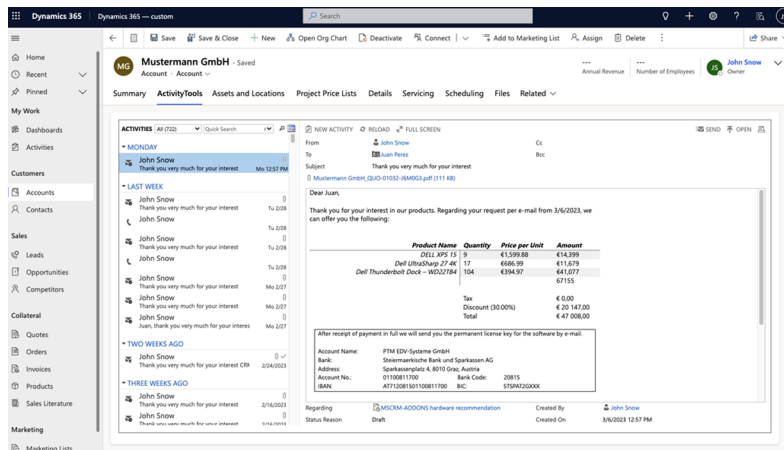
Completely **integrated with SharePoint**, our tool automatically extracts attachments and notes from e-mails and saves them to the correct document location. If the location does not exist, it will create it for you.

ActivityTools

All your activities in one place for Dynamics 365 & Power Apps



Our solution facilitates the management of activities and e-mails by delivering an Outlook-like interface within the Dynamics 365 platform. ActivityTools is seamlessly integrated into Dynamic 365 and model-driven forms and offers a range of functionalities, such as the ability to establish e-mail signatures or default senders for each Dynamic 365 user.



ActivityTools' interface offers a comprehensive **MS Outlook-like view of your records** from every angle.



Whether you're looking for a **complete view of your sales history** in "Opportunities" or a **direct view of your service history**, ActivityTools has you covered.



Efficiently handle **all your activities from a single location**.

TelephoneIntegration

Streamlined telephony processes for Dynamics 365 & Power Apps



TelephoneIntegration was created to address the challenge of managing calls and Dynamics 365 simultaneously.

Its features, including Caller Recognition, Screen Pops and Click-2-Dial, will enhance your daily phone tasks and ensure proper tracking within Dynamics 365. Other features, such as Power-Dialer and Chat-Integration, complement our comprehensive CTI-solution, enabling you to optimize your use of Dynamics 365 while saving time and resources.



- ✓ Once a call is identified, our CTI system will **access information from Dynamics 365** and display relevant caller details.
- ✓ With **Click-2-Dial**, calling prospects and customers has never been easier. In Dynamics 365, this feature is conveniently located next to any phone number field, accessible from both the search and CommandBar.
- ✓ Compatible to almost all **major telephone manufacturers**.

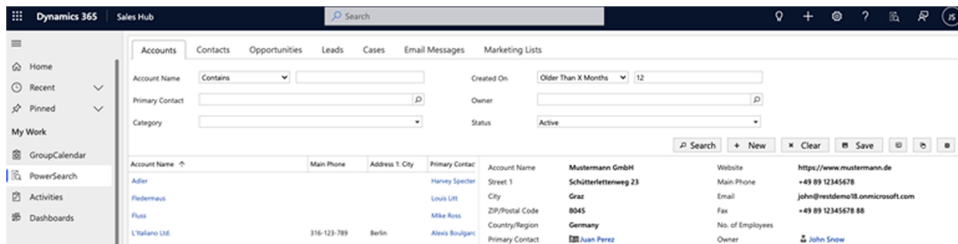
PowerSearch

The power of advanced search in a user-friendly package for Dynamics 365 & Power Apps



Streamline your Dynamics 365 search experience by combining the power of Advanced Find's robust capabilities while still enjoying the simplicity of the basic search functionality.

With the ability to save common search queries and search across multiple fields, you can significantly reduce the time spent on searching. Additionally, you can take advantage of native Dynamics 365 Grid functionality to perform actions like Bulk-Edit or Export to Excel on your search results, enhancing your overall search experience.



PowerSearch combines the **simplicity** of Dynamics 365 search with the **advanced features** of an Advanced Find.



By predefining common search queries, you can save valuable time while **reducing the clicks** needed to find the requested data.



You can **view result records directly** without having to open them individually. These previews can be customized to meet your specific requirements.

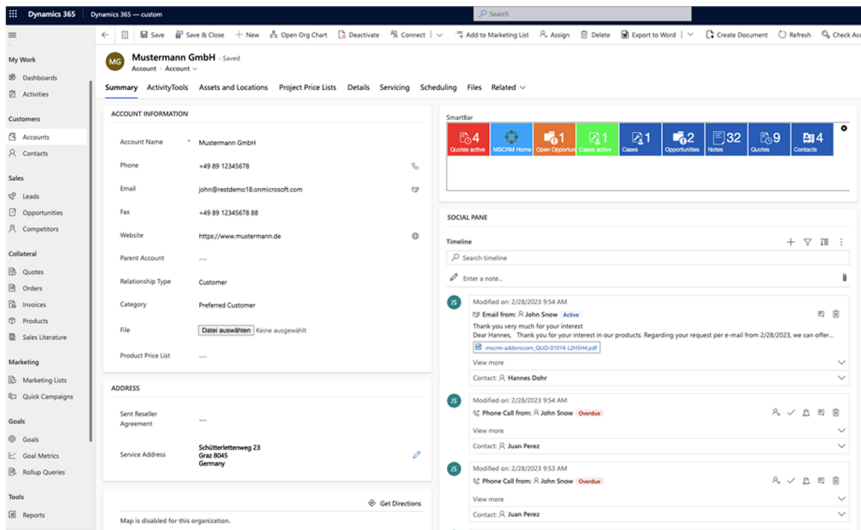
SmartBar

Personalized navigation that fits your unique needs in Dynamics 365 & Power Apps



We created SmartBar to address the challenge of navigating between related records, which can often be tiring.

SmartBar enables users to easily navigate between related Dynamics 365 records and can be personalized to meet each user's unique Dynamics 365 needs. This tool supports both standard and custom tables.



Easy access to your most important views like "Open Cases", "Overdue invoices", or "Important opportunities".



Seamless data management with just one click! Accessing related records in a Single Point of Information has never been easier.

Partner Program



Working with Partners is the key to success!

Our objective is to operate our business in a manner that not only fulfills but surpasses the expectations of both our customers and business partners. We are fully dedicated to assisting our business partners at every stage through a specialized partner program that ensures long-term success in their ventures.

Our partners play a vital role in our distribution network. They seamlessly incorporate our Add-Ons into their comprehensive solutions, allowing clients worldwide to access our products easily in their local markets. We highly value the collaborative partnership with our resellers and are grateful for their commitment.



Embark on an exhilarating journey with our **expert-guided onboarding program**



Unleash your potential through **strategic planning** and unwavering **ongoing support**



Access to **training resources** and **professional materials**



Enjoy exclusive access to **licenses for all our solutions**



Elevate your success with recurring **reseller margins** that soar **as high as 30%**

References

What our customers say about our solutions.



■ GEBERIT



“I am absolutely thrilled about the amazing capabilities of DocumentsCorePack that have made our document-heavy business processes a breeze to manage. What's more, the outstanding support provided by the team at mscrm-addons has been truly exceptional, and I haven't come across any other service provider that offers such top-notch assistance. Overall, my experience with DocumentsCorePack has been nothing short of remarkable, and I couldn't be happier with the results it has delivered.”

Ferdinand von Gaisberg, Senior IT Application Analyst



“I think the most compelling statement I can make is that in 15+ years I have NEVER had a bad experience with anyone from mscrm-addons.com. Yes, we've had issues that took a while to resolve (mostly due to MS product changes) but they worked hand in hand with us to ensure our (mutual) clients achieved their desired outcomes. They are my bar for ISV relationships.”

Michael Hauk, Chief People & Experience Officer

References

What our customers say about our solutions.



“The smart tools mscrm-addons.com has developed have taken our experience with Microsoft Dynamics to the next level. The tools are well-developed, well-supported, and the team is wonderful to work with. Everyone I’ve ever communicated with on the mscrm-addons.com team, from support to sales to execs, have been friendly, knowledgeable and helpful. **”**

Abby Torres, Director of IT



“We have been a partner for 8 years with mscrm-addons. We have never considered another third party vendors than mscrm-addons.com for the products and services we use from their product portfolio. That is a statement by itself. Their support is so impressive and good. That is a keyfactor to us along with that we are taken seriously if we have suggestions for new functionality, improvements or problems. The products are also very well documented. My warmest recommendations. **”**

Stig Karlsen, Solution Architect



Contact



We are available for you 24/7 by mail, phone or chat

PTM EDV-Systeme GmbH

Address: Bahnhofguertel 59

A-8020, Graz

Phone: +43 316 680 880

Mail: office@mscrm-addons.com

Web: www.mscrm-addons.com



mscrm-addons.com Corp.

Address: 1860 N Rock Springs Rd NE, STE 201

Atlanta, GA 30324

Phone: +1 404 720 6066

Mail: sales@mscrm-addons.com

Web: www.mscrm-addons.com



Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. The paper has rounded corners at the top and bottom edges. The background behind the paper is dark grey.

Notes





14-Days Free Trial

For all our solutions

- ✓ No payment required
- ✓ Full support included

UNLOCK THE FULL POTENTIAL OF DYNAMICS 365 & POWER PLATFORM

EUROPE (*Graz, Austria*)

 +43 316 680 880

USA (*Atlanta, GA*)

 +1 404 720 6066

EMAIL

 info@mscrm-addons.com