



Push the boundaries of **Microsoft Dynamics 365** with our addons!



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Who we are

mscrm-addons.com is a Microsoft Gold Certified Partner, providing high-quality software solutions. We have specialized in developing add-ons for Microsoft Dynamics 365, Power Apps & Power Automate. When talking about Dynamics 365 in this brochure, we refer to the modules Sales, Customer Service, Field Service and Project Service Automation.

Why mscrm-addons.com?

We strive to develop products that are practical, easy to use and innovative. We aim to provide technical solutions that exactly meet our customer's needs. Our well trained, highly certified staff and our excellent knowledge of Microsoft technologies guarantee that we provide only the best solutions for our customers.



DocumentsCorePack (DCP)

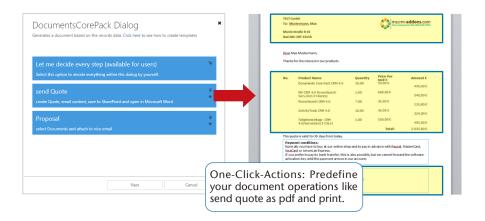
Professional document generation, processing and automation

Get your
FREE TRIAL
on AppSource or on
www.mscrm-addons.com!

Document Generation & Processing - How does it work:

Documents are crucial in every Dynamics 365 implementation. Whether you need to send sales or service documents, internal reports or contracts for signing, DocumentsCorePack will help you streamline and simplify your requirements.

- **1. Design:** The easy, intuitive and powerful handling of the Template Designer extends the capabilities of Microsoft Word with an interface to Microsoft Dataverse.
- **2. Generate:** Create individual or batch documents in various formats within Dynamics 365, Power Apps, Power Automate & Canvas Apps.
- **3. Process & Deliver:** Every document generated has a purpose. The extensive options provided by our CommandBar dialog will speed up your document-related business processes & reduce your user's workload.
- **4. Automate:** The DocumentsCorePack connector allows you to use the full suite of document generation & delivery options with Power Automate (Flow) or classic Dynamics 365 workflows enabling full document automation.





Document Automation

- PowerApps-Connector: The DocumentsCorePack connector for Power Automate and Canvas Apps allows you to utilize your document capabilities in your custom applications and background processes (Flows)
- Dynamics 365 processes integration: Automate your document processes via Dynamics 365 workflows or Microsoft Flow
- Reducing your user's workload and standardizing your internal and external documents
- Scheduled reports (daily, weekly, monthly)

Maisons Pierre is a company who builds around 2000 houses per year. Their business requires a lot of document creation such as sales contracts, town planning, finance and a lot more. Thanks to DocumentsCorePack we were able to automate all these document generation processes, structure their files in SharePoint and use DocuSign in DocumentsCorePack to secure and accelerate the customer engagement.

Frédéric Skobel, Consultant CRM

1. Event occours in your environment and triggers a Flow

2. Within the Flow, DocumentsCorePack provides a broad variety of actions to automatically create and process documents

Trigger:

- Create, delete, update of records
 - · Contact is created
 - · Quote is activated
- · User triggers Flow on demand





Dynamics 365 Customer Engagement



DocumentsCorePack connector

- Create document
 - Send by e-mail,
 - Print
 - Save to SharePoint
 - 20+ actions available



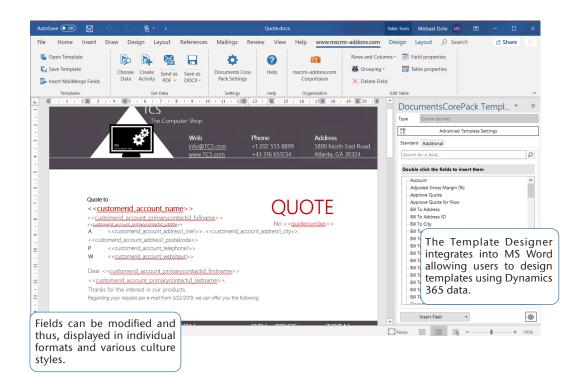
Power Automate (Flow)





Template Design

- Microsoft Word based: No design/feature limitations
- Dynamics 365 connector: Map any fields from Dynamics 365 or DataVerse
 - Unlimited support for relationships
 - · Filter & sort data
 - All attribute types supported
- Special features: Embedding of pictures, sub-documents, e-Signature tags, HTML, QR-codes ... (See table on page 7)



DocumentsCorePack is available for:



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

	DocumentsCorePack	Native Dynamics 365
Key Differences		
Microsoft Word based Template Designer	Easy to use Word Add-In	XML-based mapping via developer ribbon
Mapping of Dataverse data: Resolve relationships Filter & sort results Formatting (e.g. date, money values)	Multi-Level	Limited to 1 level X X X
Connector for Power Automate & Power Apps: - Full document automation via Flows - Document generation & processing in Canvas Apps	<i>,</i>	x x
One-Click document processes: - Generate and process documents with a single click	✓ All document generation & processing options	✓ Only in Sales App
Batch document generation & delivery	✓	x
Template Management: - Test templates during the design - Versioning - Guided provisioning between environments	, ,	x

Document Generation & Automation

Available in: - Dynamics 365 CE	,	,
Model Driven Power Apps	,	<i>y</i>
Power Automate (Microsoft Flow)	,	X
Canvas Apps	√	, x
Command bar dialog	All Dynamics 365 CE & Model driven Apps	Only in Sales App
One-Click-Actions:		
Generate documents	✓	✓
Process documents	✓	Only in Sales App
Review & edit documents	✓	X
Access restrictions via security roles	✓	X
upported file types	.DOCX, .PDF, .HTML, .TXT,	.DOCX, .PDF
atch document generation & processing	✓	x
Dynamic document names	✓	x
Jse data from an external database	✓	x
ncorporate user input during document creation	✓	x
Occument preview	✓	Only in Sales App
	✓	✓
dit documents upon creation before processed	In MS Word automatically	In MS Word manually
Occument automation via Dynamics 365 workflows	All document generation & processing options	Only attach as note
Oocument automation via Power Automate	DocumentsCorePack Connector	x

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

	DocumentsCorePack	Native Dynamics 365
Document Processing & Delivery		
Generate e-mail attachments	✓	Only in Sales App
Generate e-mail content	✓	x
Generate and attach to activity	All activity types	x
Attach as note	✓	Only in Sales App
Save to SharePoint: - Dynamic save locations - Create SharePoint locations - Write metadata to SharePoint	All file types	Only in Sales App ** ** ** ** ** **
Send for e-Signing (AdobeSign, DocuSign, AssureSign)	✓	x
Protect files (PDF & password protection)	✓	x
Run processes upon document generation (Flows, Workflows)	1	x
Local & Cloud Printing	✓	x
Combine documents	✓	x

Template Design

Relationships:	,	,
- One-to-Many, Many-to-One, Many-to-Many - Multiple levels	*/	v.
- Filter related records	4	Ç.
- Sort related records		0
- Soft felated fectors	· ·	^
Data Manipulation:		
- Grouping	✓	X
- Calculations	✓	X
- String manipulation	✓	X
	1	1
Conditions & conditional content (if / else)	Condition Designer	Word Field Function
E with CB CM La	condition Designer	Trora Fiela Faricion
Formatting of DataVerse data:		
 Field-type specific formatting (e.g. Date, money fields) Conditional formatting 	4,	X.
	✓	X
Dynamic images:		
- Entity images	\checkmark	✓
- Images from notes (stored in Dataverse)	\checkmark	X
- Images from URL (stored in Dataverse)	✓	X
Dynamic content:		
- Charts (presenting Dataverse data)	✓	X
- Document name	✓	X
- Hyperlinks	✓	X
- QR Codes	✓	X
- HTML (stored in Dataverse)	✓	X
- Filters	✓	X
e-Signature (predefine tags for):	,	
- AdobeSign	V	X.
- DocuSign	V	- K
- AssureSign	✓	×
Work with sample data	1	X
TOTA THE Sumple data	•	^





AttachmentExtractor (AE)

Save money and Dynamics 365 data storage by moving e-mail attachments, notes and e-mail content

Get your
FREE TRIAL
on AppSource or on
www.mscrm-addons.com!

Your benefits at a glance:

Challenges:

 Received e-mail attachments, notes and e-mail content lead to high demand on storage capacity and expensive database space.

Solution:

- AttachmentExtractor saves money and Dynamics 365 data storage by moving e-mail attachments, notes and e-mail content to SharePoint or Azure Blob Storage
- Files are replaced with links inside Dynamics 365 so users will **not see a difference when accessing extracted content!** Our solution improves business processes by running in the background and saves money and database storage in Dynamics 365

Custom extraction rules:

- Touch only e-mails related to certain entities (Whitelist) or block entities (Blacklist)
- Set up a scheduler to perform tasks (e.g.: extract weekly, daily...)
- Archive data define extraction based on date/time values (older than X years)

66

Attachment Extractor is our go-to solution when a customer has files stored in Dynamics 365. It's simple to configure and monitor and provides a seamless solution to move big files to SharePoint.

Heidi Neuhauser, CRM Heidi

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AttachmentExtractor is available for:



ActivityTools (AT)

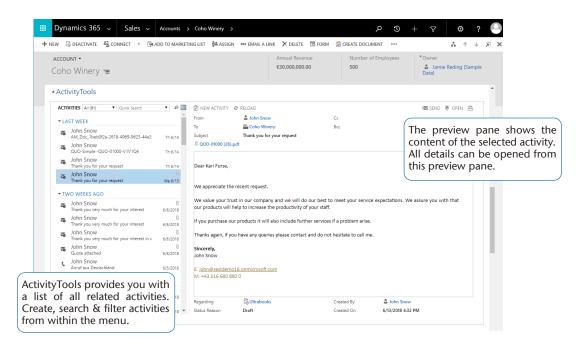
Add some Outlook-feeling to Microsoft Dynamics 365 activities



Your benefits at a glance:

360° view on all activities related to a record:

- List view: Show activities in reverse chronological order
- Advanced search and filter capabilities (content, status, type, date-range)
- Preview pane: Direct preview of activities and attachments
- Load "on-demand" to ensure high performance
- Fully customizable layout and preview pane
- Can be embedded into any entity form or dashboards
- Support for user-views (inbox) and queue-views



ActivityTools is available for:





TelephoneIntegration (TI)

Connect your phone system to Dynamics 365

Get your
FREE TRIAL
on AppSource or on
www.mscrm-addons.com!

Your benefits at a glance:

Capture and track phone calls:

- Caller Recognition: Once a call is recognized, our solution will search the Dynamics 365 system and display information about the caller
- Screen Pops: Dynamics 365 records and call activities can be configured to automatically pop-up on incoming and outgoing calls
- Auto creation of Dynamic 365 records: Create new records on incoming calls (e.g. phone calls, tasks, cases, opportunities, accounts, contacts or leads)

Simplify dialing:

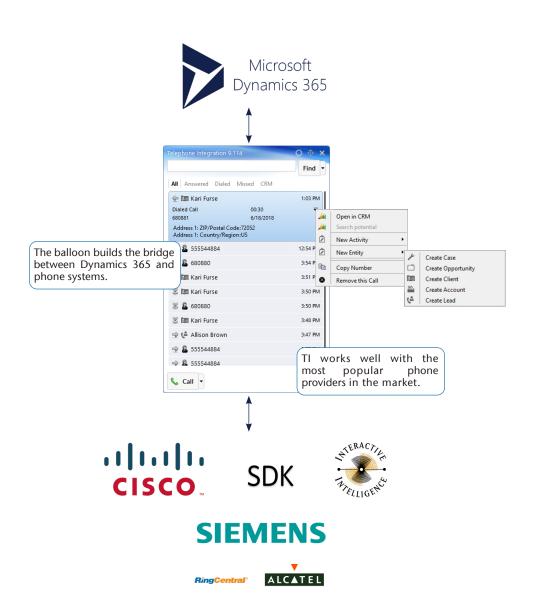
- Click2Dial on a phone number or with a click on the 'Call number'-button in the command bar
 from within the balloon simply by entering the phone number
- 'Dialing from related records' enables you to call phone numbers from related records (e.g. call directly from an opportunity)

Additional features:

- Call statistics inside Dynamics 365: Track every call
 This allows you to analyze your calls based on Dynamics 365 dashboards
- The PowerDialer supports dialing lists
 Dialing lists are created directly from campaign activities or power dialing entities in Dynamics 365
- Supports Unified Service Desk (USD)
 Instead of opening Dynamics 365 records in your browser, the Dynamics 365 records (contact, account, lead) are opened in the USD Client

Supported phone systems

- HTTP API/SIP Client (connect via VoIP thanks to our built-in SIP Client wrapper)
- TAPI driver enabled phone systems like Cisco, Alcatel, Siemens and many more
- RingCentral
- Interactive Intelligence



TelephoneIntegration is available for:





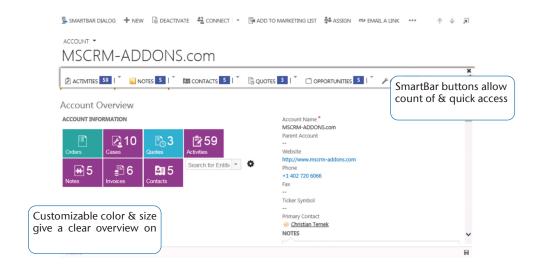
SmartBar (SB)

Navigate in Microsoft Dynamics 365 like a pro

Get your
FREE TRIAL
on AppSource or on
www.mscrm-addons.com!

Your benefits at a glance:

- Smart navigation between related Dynamics 365 records (Simple back & forth navigation)
- Configurable Views: Display critical information like "Open Cases" or "Opportunities over 10K"
- Numbers next to the button indicate the number of related records per entity (e.g. the number of quotes, orders, etc. related to the opened record is counted)
- Color-coding: Hide buttons or change button color based on defined count ranges
- Drag & drop functionality enables users to change the buttons order
- Display SmartBar in Standard or Metro Style, a vertical/horizontal order and various colors
- Create custom buttons (JavaScript Function, Links, Views, Entity/SiteMap, Scroll to section)
- Fully customizable look & feel: Embedded into any entity or dashboard (personal menus)
- Show/Hide buttons based on count or field values



SmartBar is available for:



PowerSearch (PS)

Finding records in Microsoft Dynamics 365 has never been easier



Your benefits at a glance:

Search capabilities:

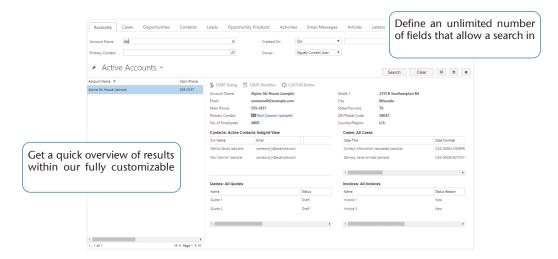
- Simple UI for complex reusable queries
- All search operators supported (as in Advanced Find)
- Support of AND/OR keywords
- · User defined default search values

Working with results:

- Result preview: View result details without opening them
- Customizable grid with access to results and related records
- Open results in Dynamic 365 grids to support common tasks (bulk edit, export to Excel, ...)
- Execute workflows/actions against results (single & bulk)

Configuration:

- Fully customizable search & result fields
- · Customizable previews and actions
- Convert Advanced Find via fetch import



PowerSearch is available for:





GroupCalendar (GC)

Schedule & reschedule users, groups and resources via drag & drop

Get your
FREE TRIAL
on AppSource or on
www.mscrm-addons.com!

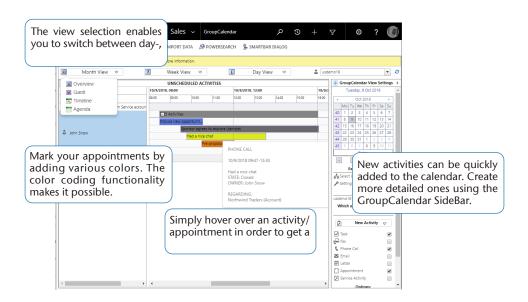
Your benefits at a glance:

Scheduling feature:

- Define/select/display users, teams, resources and/or resource groups
- Display time-off and working hours of your users
- Color coding of activities manually or via business rules
- Print & Print preview
- Fully customizable content
- · Embed our add-on into any entity

Views:

- All views available in day-, week- or month-view
- TopDown-view (like Outlook), List-view, Gantt-view, Timeline-view and Agenda-view



GroupCalendar is available for:



Partner Program

Working with partners is the key to success!

Your benefits at a glance:

Our resellers form a major part of our distribution network. They integrate our Add-ons in their onestop-shop solutions for clients all over the world and therefore enable easy access to our products on local markets. We appreciate the mutual partnership and our reseller's commitment.

- Partner Levels:
 - Different partnership levels based on annual revenue generated with mscrm-addons
- Reseller margin for all sales of our solutions:
 Your margin depends on your annual sales volume
- Free Internal Use and Resell licenses

 After signing up, you will be provided with free licenses valid for 3 months. Once a license is sold, the licenses are extended for a further year
- Ongoing Educational offering for your team

 Free support via e-mail, online-chat/-sessions, or telephone, frequent online training to keep your consultants and sales teams up to date
- Weekly Live Demonstrations of our Add-ons for Dynamics 365
 Every week you can join us for live overviews and demonstrations of our Add-ons to explore how our solutions can be used to increase usability and productivity
- Improve your Dynamics 365-offer without investing time in development & support
 Partners can boost their Dynamics 365 offering without the need to develop & support the
 solutions involved
- No Dynamics 365-service competition: mscrm-addons.com is a strict non-revenue ISV
 To avoid potential partner conflicts, we do not provide Dynamics 365 services. We always pass
 on customer requests to our partners. If our partners need assistance and request our help, we
 offer development services (hourly rate on request)
- **Building long-term relationships with your customers**By providing a point of contact when it comes to working with our solutions, our partners can establish and maintain long-term relationships with their customers
- NO Minimum, NO Fees

If you are interested in becoming a reseller, please register on our website and fill & submit the reseller form, which can be found under the link below:

www.mscrm-addons.com/About-us/Partner-Program/Become-a-reseller



Pricelist in EUR

	Norma	al License*1	"PerUse	r" License*²
Product	Price Support & Maint. *3		Price	Support & Maint. *3
GroupCalendar (GC)	60€	14€	120€	28€
ActivityTools (AT)	45 €	14€	90€	28€
PowerSearch (PS)	45 €	14€	90€	28€
SmartBar (SB)	25 €	14€	x	x
TelephoneIntegration (TI)	x x		120€	28€

Value Package		
	Price	Support & Maint. *3
Value Package (GC, AT, PS, SB combined)	120€	28€

Subscription Prices *4

	Normal	License*5	"PerUser" License*6		
Product	monthly annually		monthly	annually	
GroupCalendar (GC)	3,00 €	2,50€	6€	5€	
ActivityTools (AT)	2,50€	2,00€	5€	4€	
PowerSearch (PS)	2,50 €	2,00€	5€	4€	
SmartBar (SB)	1,60 €	1,25€	х	х	
TelephoneIntegration (TI)	х	х	6€	5€	

^{*1...} .Normal-license: You will need to buy as many licenses as there are active users in your Dynamics 365 system

 $^{*2\}dots$ "PerUser"-license: GC, AT and PS require a minimum amount of 10. TI requires a minimum of 5

^{*3 ...} Support & Maintenance price / user / year (year one included in the initial purchase)
*4 ... The minimum term of the subscription contract is one month or one year; yearly rate (monthly rate x 12)

^{*5....}Normal-license: You will need to buy as many licenses as there are active users in your Dynamics 365 system (AT, GC, PS and SB require a minimum of 5)

Pricelist in EUR

DocumentsCorePack (DCP)						
Package	Perpetual License		Subscription			
	Price	Support*1	monthly	annually	Documents incl.	TD *2
XS (≤ 10 users)	660€	130€	55€	600€	500	1
S (11 - 30 users)	1.200€	240 €	90€	990€	1.000	1
M (31 - 80 users)	3.000€	600€	150€	1.560€	5.000	2
L (81 - 140 users)	5.000€	1.000€	200€	2.100 €	10.000	2
XL (141 - 300 users)	10.000€	2.000 €	420€	4.560 €	25.000	5
XXL (301 - 600 users)	19.000€	3.800 €	790 €	8.280€	50.000	10
Enterprise (600+ users)	on requ	uest	on request		on request	
Additional Packages						
1,000 documents	х		11€	7,50€	х	
1 Template Designer	60€	14 €	7 € 6 € x		х	

AttachmentExtractor (AE)					
Package	Perpe	etual License	Subsc	ription	
	Price	Support & Maint. *1	annually*3	Bandwidth*4	
XS (≤ 10 users)	660€	165€	600€	2.5 GB	
S (11 - 30 users)	1.200€	300€	990 €	5 GB	
M (31 - 80 users)	2.400 €	600€	1.440 €	10 GB	
L (81 - 140 users)	3.000€	760€	1.800 €	15 GB	
XL (141 - 300 users)	5.000€	1.250€	2.880€	20 GB	
XXL (301 - 600 users)	8.300 €	2.075€	4.980 €	25 GB	
Enterprise (600+ users)	on request				

^{*1 ...} Support & Maintenance price / user / year (year one included in the initial purchase)
*2 ... TD = Template Designer included in this package
*3 ... The minimum term of contract is one year; billing is conducted once a year (monthly rate x 12)



Pricelist in USD

	Norma	al License*1	"PerUse	r" License*²
Product	Price Support & Maint. *3		Price	Support & Maint. *3
GroupCalendar (GC)	\$ 75	\$ 19	\$ 150	\$ 38
ActivityTools (AT)	\$ 55	\$ 19	\$ 110	\$ 38
PowerSearch (PS)	\$ 55	\$ 19	\$ 110	\$ 38
SmartBar (SB)	\$ 30	\$ 19	x	x
TelephoneIntegration (TI)	х	x	\$ 150	\$ 38

Value Package		
	Price	Support & Maint. *3
Value Package (GC, AT, PS, SB combined)	\$ 150	\$ 38

Subscription Prices *4

	Normal	License*5	"PerUser" License*6		
Product	monthly	annually	monthly	annually	
GroupCalendar (GC)	\$ 4.00	\$ 3.50	\$ 8	\$ 7	
ActivityTools (AT)	\$ 3.00	\$ 2.50	\$ 6	\$ 5	
PowerSearch (PS)	\$ 3.00	\$ 2.50	\$ 6	\$ 5	
SmartBar (SB)	\$ 2.00	\$ 1.75	х	х	
TelephoneIntegration (TI)	х	х	\$8	\$ 7	

^{*1...} .Normal-license: You will need to buy as many licenses as there are active users in your Dynamics 365 system

 $^{*2\}dots$ "PerUser"-license: GC, AT and PS require a minimum amount of 10. TI requires a minimum of 5

^{*3 ...} Support & Maintenance price / user / year (year one included in the initial purchase)
*4 ... The minimum term of the subscription contract is one month or one year; yearly rate (monthly rate x 12)

^{*5....}Normal-license: You will need to buy as many licenses as there are active users in your Dynamics 365 system (AT, GC, PS and SB require a minimum of 5)

Pricelist in USD

DocumentsCorePack (DCP)							
Package	Perpetual License		Subscription				
	Price	Support*1	monthly	annually	Documents incl.	TD *2	
XS (≤ 10 users)	\$ 900	\$ 180	\$ 70	\$ 720	500	1	
S (11 - 30 users)	\$ 1,700	\$ 340	\$ 120	\$ 1,320	1,000	1	
M (31 - 80 users)	\$ 4,000	\$ 800	\$ 210	\$ 2,220	5,000	2	
L (81 - 140 users)	\$ 6,800	\$ 1,360	\$ 275	\$ 2,880	10,000	2	
XL (141 - 300 users)	\$ 13,700	\$ 2,740	\$ 550	\$ 5,640	25,000	5	
XXL (301 - 600 users)	\$ 26,000	\$ 5,200	\$ 1,050	\$ 11,100	50,000	10	
Enterprise (600+ users)	on request		on request		on request		
Additional Packages							
1,000 documents	x		\$ 14	\$ 11	х		
1 Template Designer	\$ 75	\$ 19	\$ 9	\$8	Х		

AttachmentExtractor (AE)							
Package	Perpetual License		Subscription				
	Price	Support & Maint. *1	annually*3	Bandwidth*4			
XS (≤ 10 users)	\$ 900	\$ 220	\$ 720	2.5 GB			
S (11 - 30 users)	\$ 1,700	\$ 425	\$ 1,320	5 GB			
M (31 - 80 users)	\$ 3,200	\$ 800	\$ 1,800	10 GB			
L (81 - 140 users)	\$ 4,000	\$ 1,000	\$ 2,400	15 GB			
XL (141 - 300 users)	\$ 6,800	\$ 1,700	\$ 3,720	20 GB			
XXL (301 - 600 users)	\$ 11,300	\$ 2,825	\$ 6,600	25 GB			
Enterprise (600+ users)	on request						

^{*1 ...} Support & Maintenance price / user / year (year one included in the initial purchase)
*2 ... TD = Template Designer included in this package
*3 ... The minimum term of contract is one year; billing is conducted once a year (monthly rate x 12)





DocumentsCorePack

Professional document generation and processing in Dynamics 365



AttachmentExtractor

Extract files and e-mail attachments to SharePoint or Azure Blob



TelephoneIntegration

Connect your phone system with Microsoft Dynamics 365



ActivityTools

Simple overview of Dynamics 365 activities
Outlook - Look & Feel for e-mails



SmartBar

Smart navigation between related Dynamics 365 records



PowerSearch

Combine the simplicity of Dynamics 365 Search with the features of Advanced Find



GroupCalendar

Effective scheduling of users, teams and resources in Dynamics 365

Get your **14 Days Free Trial** for all our solutions!

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