

ENHANCED DOCUMENT MANAGEMENT

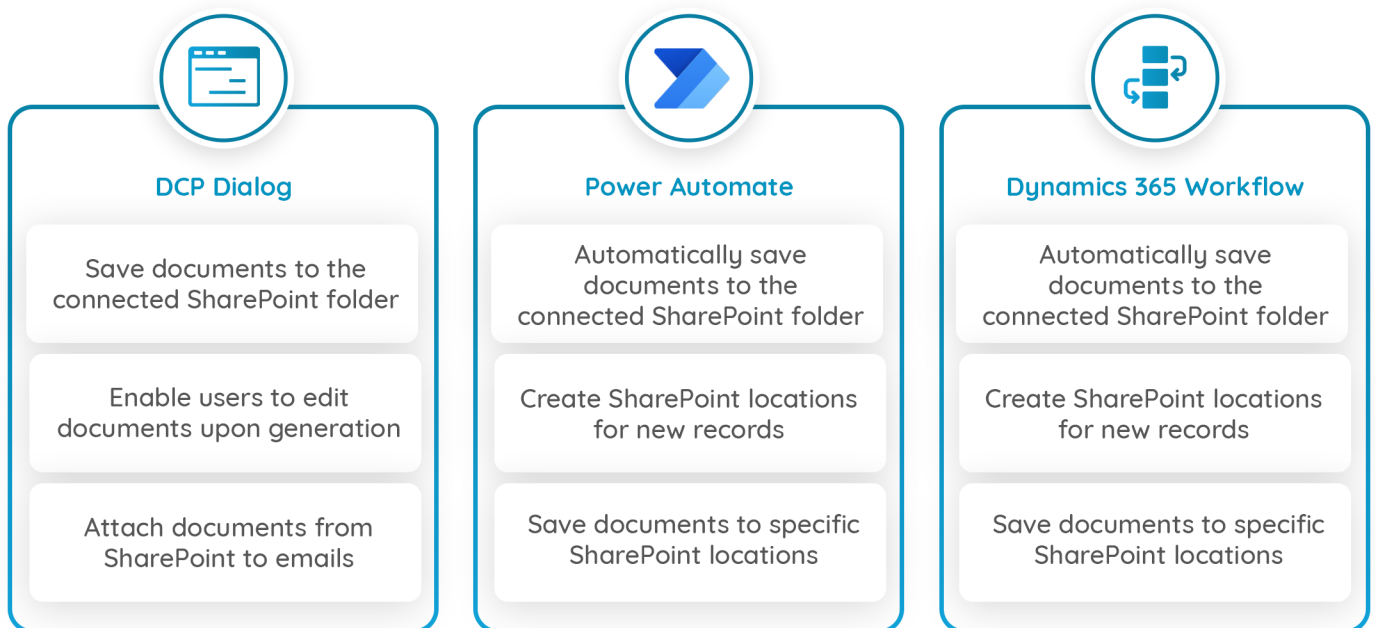
via the DocumentsCorePack
SharePoint integration



DocumentsCorePack is a powerful tool designed to streamline document management processes within Microsoft Dynamics 365 and on the Power Platform. When integrated with SharePoint, it provides not only storage capabilities but also a range of additional benefits that enhance collaboration, efficiency, and organization of documents within your business.

How does the integration work?

Once configured, DocumentsCorePack (DCP) provides several options to store generated documents into the respective folder on SharePoint.



DocumentsCorePack can be configured to utilize the Dynamics 365 SharePoint integration. Thus documents are stored and accessible in folders of the respective data record. In addition, DCP also allows to setup a standalone SharePoint environment to store files.



Additional features when using DocumentsCorePack with SharePoint

The advantages extend beyond merely storing documents on SharePoint. Integrating DocumentsCorePack with SharePoint provides a diverse array of valuable additional features for streamlining document management in day-to-day work.



Population of Metadata into SharePoint

DocumentsCorePack supports the population of metadata into SharePoint. This streamlines document management, ensures data consistency, and enhances collaboration by simplifying search and retrieval within SharePoint.



Auto Creation of SharePoint Folders

DocumentsCorePack can automatically create SharePoint locations, folders, and subfolders. This saves time, ensures accuracy and consistency, ultimately enhancing efficiency and organization in document management processes.



Specific SharePoint Locations

DocumentsCorePack's ability to save generated documents to specified SharePoint URLs enhances collaboration and organization, facilitating easy access and sharing across teams.



Attaching Documents to Emails

DocumentsCorePack enables users to attach documents like sales literature located on SharePoint to emails sent via the DCP Dialog, ensuring efficient collaboration and document access.



“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 (ReEmployability)



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