

# DOCUMENTSCOREPACK VS. DYNAMICS 365 OUT-OF-THE-BOX



## Key Differences

Key Differences	DocumentsCorePack	OOTB D365
<b>MS Word-based Template Designer</b>	 Easy to use Word-Add-In	 XML-based mapping via developer ribbon
<b>Mapping of Dataverse data</b> <ul style="list-style-type: none"> <li>- Resolve relationships</li> <li>- Filter results</li> <li>- Sort results</li> <li>- Formatting (e.g. date)</li> <li>- JSON data sources</li> </ul>	Multi-level    	limited to 1 level    
<b>Connector</b> <ul style="list-style-type: none"> <li>- Full document automation (Flows)</li> <li>- Document generation &amp; processing in Canvas Apps, Power Pages and CoPilot</li> </ul>	 	
<b>One-Click document processes</b> Generate & process documents according to your business needs	 All document generation & processing options	 Only in Sales App Limited to PDF files
<b>Batch document processing</b> <ul style="list-style-type: none"> <li>- Load Balancing for high perform.</li> </ul>	 	 
<b>Template management</b> <ul style="list-style-type: none"> <li>- Test templates during the design</li> <li>- Versioning &amp; history</li> <li>- Conditional template selection</li> <li>- Guided provisioning btw. environm.</li> <li>- Customizable sample templates</li> </ul>	    	

Document Generation	DocumentsCorePack	OOTB D365
<b>Available in</b> <ul style="list-style-type: none"> <li>- Dynamics 365 CE</li> <li>- Model-driven Power Apps</li> <li>- Power Automate (MS Flow)</li> <li>- Canvas Apps</li> <li>- Power Pages</li> <li>- CoPilot</li> </ul>	<ul style="list-style-type: none"> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> </ul>	<ul style="list-style-type: none"> <li>✓</li> <li>✓</li> <li>✗</li> <li>✗</li> <li>✗</li> <li>✗</li> </ul>
<b>AI-powered document creation</b> <ul style="list-style-type: none"> <li>- CoPilot</li> <li>- CoPilot Agents</li> </ul>	<ul style="list-style-type: none"> <li>✓</li> <li>✓</li> </ul>	<ul style="list-style-type: none"> <li>✗</li> </ul>
<b>Command bar dialog</b>	All Dynamics 365 CE & Model-driven Apps	Only in Sales App Limited to PDF files
<b>One-Click-Actions</b> <ul style="list-style-type: none"> <li>- Generate documents</li> <li>- Process documents</li>   <li>- Review &amp; edit documents</li> <li>- Access control</li> </ul>	<ul style="list-style-type: none"> <li>✓</li> <li>✓</li>   <li>✓</li> <li>✓</li> </ul>	<ul style="list-style-type: none"> <li>✓</li> </ul> Only in Sales App Limited to PDF files <ul style="list-style-type: none"> <li>✗</li> <li>✗</li> </ul>
<b>Conditional template selection</b>	✓	✗
<b>Supported file types</b>	*.DOCX, *.PDF, *.HTML, *.TXT, ...	*.DOCX, *.PDF
<b>Batch operations</b> <ul style="list-style-type: none"> <li>- Batch document generation</li> <li>- Batch document processing</li> </ul>	<ul style="list-style-type: none"> <li>✓</li> <li>✓</li> </ul>	<ul style="list-style-type: none"> <li>✗</li> </ul>
<b>Generate documents consisting of multiple elements/sources</b>	Combine templates, SharePoint & Note documents	✗
<b>Dynamic document names &amp; properties</b>	✓	✗
<b>Use data from an ext. database</b>	✓	✗
<b>Use JSON data from</b> <ul style="list-style-type: none"> <li>- Field Service Inspection</li> <li>- Data sources</li> </ul>	<ul style="list-style-type: none"> <li>✓</li> <li>✓</li> </ul>	<ul style="list-style-type: none"> <li>✗</li> <li>✗</li> </ul>
<b>Incorporate user input during document generations</b>	✓	✗
<b>Document preview</b>	✓	Only in Sales App
<b>Edit documents upon creation before processed</b>	✓ In MS Word, the defined process continues	✓ In MS Word, manual processing required

Document Processing & Delivery	DocumentsCorePack	OOTB D365
Generate email attachments	✓	Only in Sales App Limited to PDF files
Generate email content	✓	✗
Generate & attach to activity	All activity types	✗
Attach as note	✓	Only in Sales App Limited to PDF files
<b>Save to SharePoint</b> - Dynamic save locations - Create SharePoint locations - Write metadata to SharePoint	All file types ✓ ✓ ✓	Only in Sales App Limited to PDF files ✗ ✗ ✗
<b>Send for e-signing</b> - AdobeSign - DocuSign - AssureSign - DeepSign	✓ ✓ ✓ ✓	✗
Protect files (PDF & password)	✓	✗
<b>Run processes upon docs gen.</b> - Flows - Workflows/Actions	✓ ✓	✗
<b>Printing</b> - Local/Network printing - Cloud printing	✓ ✓	✗
Combine documents	✓	✗
Document Automation	DocumentsCorePack	OOTB D365
Via Dynamics 365 workflows	✓ All document generation & processing options	✓ Only attach as note
Via Power Automate	✓ DocumentsCorePack Connector	✗

Template Design	DocumentsCorePack	OOTB D365
<b>MS Word Template Designer</b>	 via Word Add-In	 via developer ribbon
<b>Relationships</b> - 1:n, n:1, n:n - Multiple levels - Filter & sort related records - Unlimited # of related records	   	    limited to 100
<b>Data Manipulation</b> - Grouping & Multi-Grouping - Calculations - String manipulation - User prompts	   	
<b>Conditions &amp; conditional content</b>	 Condition Designer	 Word Field Function
<b>Formatting of Dataverse data</b> - Field-type specific formatting - Conditional formatting	 	
<b>Dynamic images</b> - Entity images - Images from notes (in Dataverse) - Images from URL (in Dataverse)	  	  
<b>Dynamics content</b> - Charts (represent. Dataverse data) - Document name - Hyperlinks - QR codes - HTML (stored in Dataverse)	    	
<b>e-Signature - Predefine tags for</b> - AdobeSign - DocuSign - AssureSign - DeepSign	   	
<b>e-Invoice Compliance</b> - ZUGFeRD - XRechnung - Factur-X	  	
<b>Work with sample data</b>		
<b>Embed JSON data from</b> - Field Service Inspection - Data sources	 	 
Template Management	DocumentsCorePack	OOTB D365
- Testing templates while designing - Template versioning - Template history (revisions) - Guided transfer betw. environm. - Template reports & utilization stats	    	    