How to setup automated documents inside processes in Microsoft Dynamics 365

Workflows

Increased Productivity

- Reduce mundane tasks that seem like a chore

- Process huge workloads in no time

- Free up user time for other tasks

Reduction in Errors

- Reduced errors & more control

- Higher level of data consistency

- Standardization of inbound and outbound communication

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Getting Started:
Online: Install DocumentsCorePack from AppSource
On-Prem: Download install package from mscrm-addons.com

DocumetsCorePack

Adding Document generation and post processing to Dynamics 365 workflows

Document Generation

- Create documents in various formats (pdf, docx,..)

- Generate rich email content

Processing Options

- Attach to Email and send

- E-signatures

- Save to Sharepoint

- Printing

- …

Additional & Examples

- Schedule Workflows to run at certain times.

- Create SharePoint Locations

- Examples:
  - Sending Order or Shipping information
  - Approval –initiated processes
  - Scheduled reports

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Demo

Creation of a Document

- An overview on how to use AutomergeWorkingItems to create documents.

The E-Signature Process

- Triggering the E-Signature Process via a workflow.

Advanced Processing

- The return of the e-signed document and how to catch it.

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Thank you!

- You can find us on the web at http://www.mscrm-addons.com

- Help-Center (Live-Chat, Support): http://www.mscrm-addons.com/Support.aspx

- Don't forget we have an awesome blog at http://www.mscrm-addons.com/Blog, you'll find it to be a helpful resource!

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