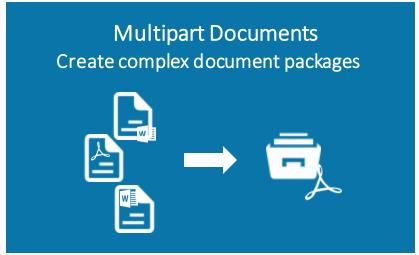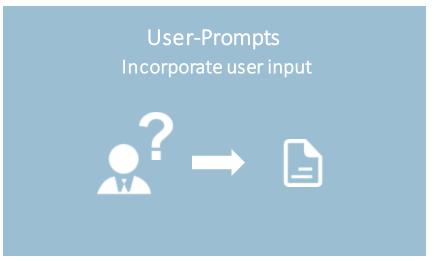# 2018 Review

and

What's coming in 2019

Clint Higley| clint.higley@mscrm-addons.com

Michael Dohr | michael.dohr@mscrm-adddons.com

Empowering Dynamics 365 Users

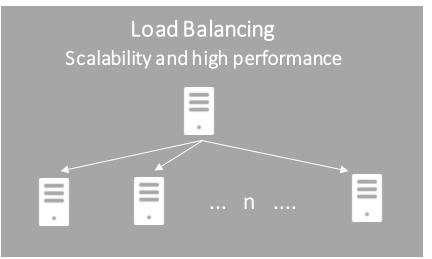# DocumentsCorePack Release Highlights

One-Click-Actions
Standardize & Simplify your processes

1 Click

Multipart Documents
Create complex document packages

User-Prompts
Incorporate user input

Condition Designer
Dynamic content based on values

Dear Mrs...

Power Platform Compatibility
Support for model driven apps, Power Apps and Flow

Load Balancing
Scalability and high performance

... n ....

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AttachmentExtractor Release Highlights

- Support for **Azure Blob Storage**

- Transparent extraction:
  - No Change in User Interface

- Streaming of documents:
  - No Security Synchronization required for SharePoint

- Web-Configuration updates
  - Time Logic
  - Blacklist/Whitelist

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UI Enhancements Release Highlights

- **Unified Client Interface compatibility***

- PowerSearch
  - AND / OR Keywords in PowerSearch
  - User defaults
  - Result Preview updates

- ActivityTools:
  - Complete View (show related regarding activities)
  - Full Screen
  - Custom filter e.g. User emails for certain record

PowerSearch
A simple and intuitive Advanced Find

SmartBar
navigation & awareness between related records

ActivityTools
simplify handling of activities and emails

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Licensing & Pricing Updates

Licensing

- Customer engagement - based licensing tab (settings)

- Team member licensing
- Security role considerations
  - Exclude users with no security role
  - Exclude specific security roles
    - App access roles

Pricing

- No price increase in 2019

- Public Team Member Pricing
  - ~ 15% of plan 1 licensing
- Optional additions:
  - Template Design Workshop
  - TelephoneIntegration - PoC
  - **Load Balancing**

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Whats Coming in 2019

Charts
Support for charts based on Dynamics 365 data

Adobe e-Sign integration
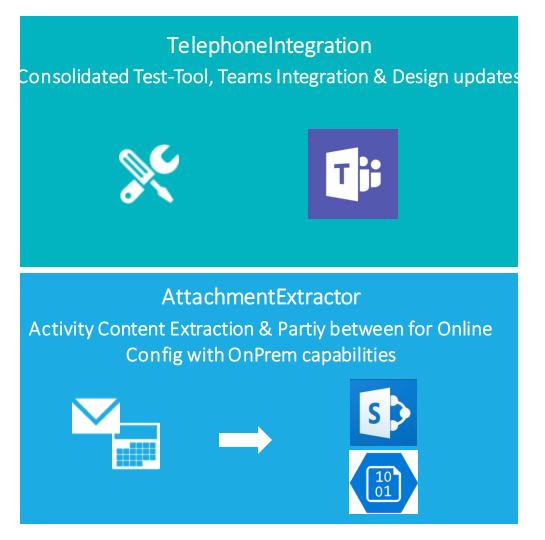Generate and send contracts in one step

- In- person / In- Store Signing for all e-Signature providers

- Conditional Formatting: Format content based on attribute values.

- Document Explorer: Management console for controls, mergefields and conditions inside a template

- Date-Time operations (Add, Timespan)

- Template preview: See template prior to document generation in Dialog

- Advanced Template Import/export utility :
  - Scheduler (backups, transfer etc.)
  - Simple transition between environments

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Whats coming in 2019

TelephoneIntegration
Consolidated Test-Tool, Teams Integration & Design updates

AttachmentExtractor
Activity Content Extraction & Partiy between for Online
Config with OnPrem capabilities

General

- Unified Client Interface (UCI)
  - Compatibility for all solutions & features

- Model Driven Apps
  - Support for CDS without 1st party solutions
  - Support for Power Apps & Flow

- Building blocks
  - Utilize solutions in e.g portals, custom controls,...)

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Thank You
&
Happy Holidays!

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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!

US: +1 404 720 6066   support@mscrm-addons.com
Europe: +43 (316) 680 880   office@mscrm-addons.com

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