



## Documents Core Pack for MS CRM 4.0

**Documents Core Pack** provides the possibility to manage documents in a comfortable and structured way.

### WordMailMerge

Enables creation of Word-Documents with data from MS CRM. It's capable to resolve any relations and works with custom entities as well as with standard CRM entities.

It's possible to resolve complex relations and therefore Documents Core Pack provides the opportunity to e.g create quotes, Invoices including data from related records like "other contacts", accounts, products etc,...

### Read-only CRM users

Documents Core Pack has no limitation on "readonly"- users in CRM 4.0. So they will be enabled to generate documents too.

### Merge options

A merge could be started directly out of the web-client



This enables users to easy create quotes or invoices as well as mass-mail-documents by choosing a marketing-list.

Additionally ist possible to start a merge directly out of MS Word.



With the opportunity to select multiple records, users can establish saved views to retrieve and use data from special e.g. conact groups for their mailmerge.

### Advantages of Documents Core Pack

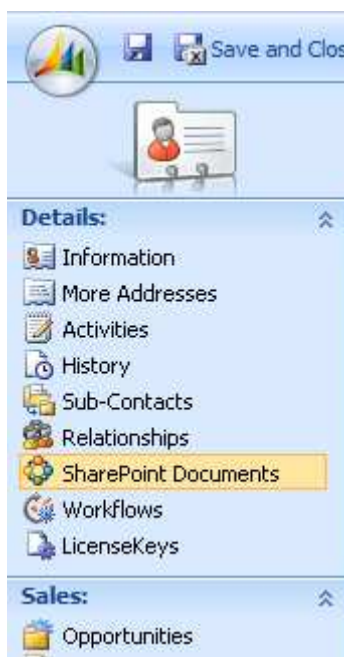
Documents Core Pack	CRM internal merge
All entities supported	Limited
Any 1->n relations can be resolved	Only available for quotes
No limitation for readonly users	
CRM activities can be titled	-
Send generated documents as PDF	-

### Sharepoint Integration

With the opportunity to save generated documents to sharepoint, the Documents Core Pack is capable to create a structured Filesystem.

The possibility to create subfolders and configure entity-specific foldernames guarantees a compact overview over the created documents and their associations to a CRM record.

e.g: it's possible to save all quotes into a subfolder of the account or associated contact.



With the integration in CRM (see picture), documents can easily be found on sharepoint.

Furtheron a link to the document is saved into the created activity itself.

### Microsoft Windows Explorer Integration

The sharepoint functionality is also available for the Windows explorer. This allows to get a structured file system of documents associated with CRM without the need to use Sharepoint services.

These integrations support all kind of files. Files can be simply integrated via Drag & Drop to into the regarding folders for the entities (Account, Contact,....,custom entity)

### Email functionalities

With the possibility to send emails out of MS Word, the Documents Core Pack provides an easy and fast solution to create and send newsletters, greeting cards to e.g. members of a marketing list. Integrated Windows Authentication is supported and further it's possible to add multiple attachments and log email-account information.

### Send PDF Files

Created documents can be send to customers as PDF files.

It converts the generated documents and therefore Documents Core Pack provides a powerful option to simplify accounting by handling invoices, quotes, orders.....

### Offline capability

There is no limitation on Documents Core Pack when a users goes offline with CRM. All templates are synchronized down on the client and can be used for mailmerge. The generated documents are temporary saved locally and synchronized with the Sharepoint /Windows Explorer when going online again.

### Technical conditions

Mandatory:

- MS CRM 4.0
- MS Office (2000,XP,2003,2007)

Optional:

- Sharepoint Services 2.0/3.0
- Sharepoint Portal Server 2003/2007

### Licensing

Documents Core Pack is licensed per user.

User license:	50€
Annual Support:	10€

Prices exclusive of VAT

