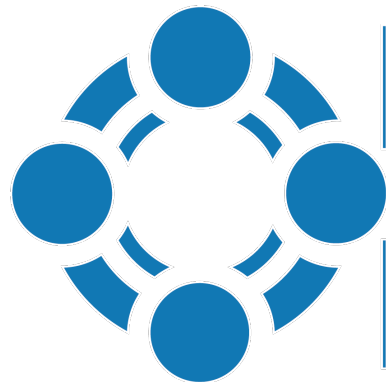




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DocumentsCorePack Connector

New Actions and Options available in V2

Clint Higley, Michael Dohr



DocumentsCorePack Connector

- Access DCP features in Power Apps and Power Automate
- Expand functionality with other connectors (800+)
- Automation via Flows
- Documents in Canvas Apps

Benefits:

- Reduced user workload
- Standardized documents

Ressources:

- [DCP-Connector for Power Automate and Power Apps](#)
- [Microsoft Learn Connector Reference](#)



25+ Actions:

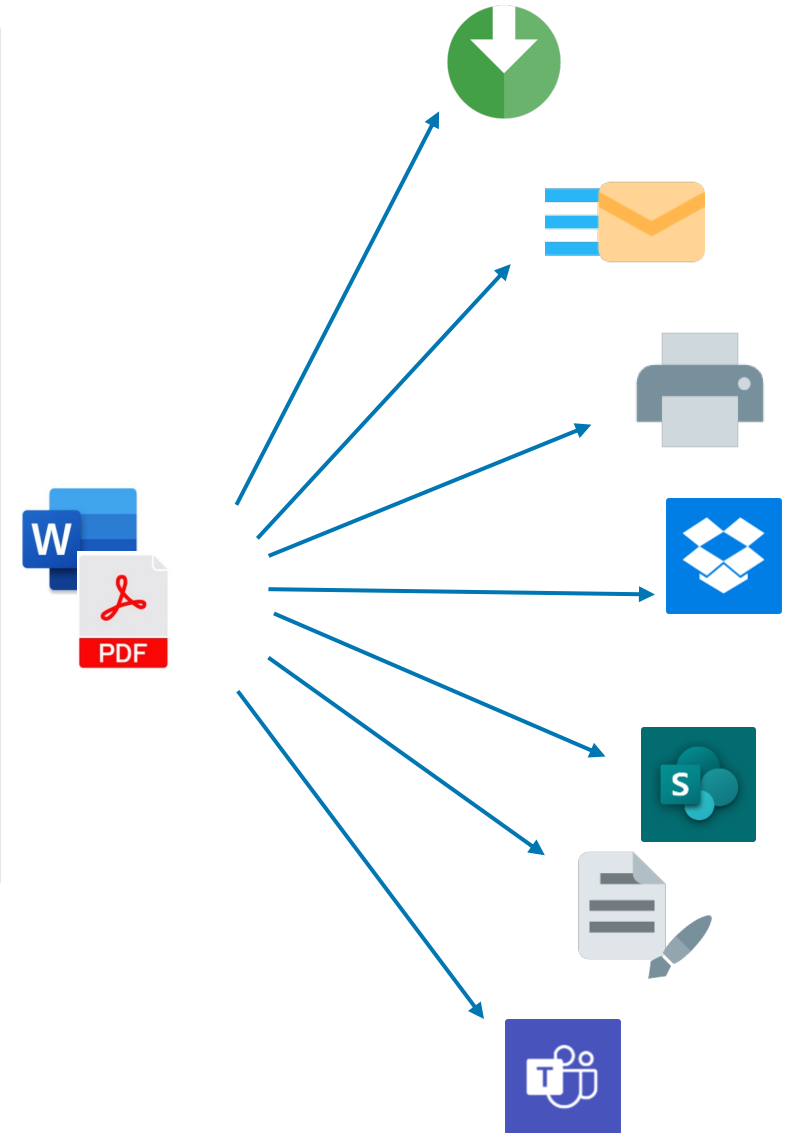
- Create document
- Send by Email,
- Print (local & cloud)
- Save to SharePoint
- Run One-Click Action
- Sign (e-Signature)
- Create SharePoint location
- ...



Power Automate (Flow)



Power Apps



New Actions added in V2



Sign Document

- Automate e-signature collection via Flows
- Support for DocuSign, AdobeSign and AssureSign
- Increase security of signature collection process



Create SharePoint Folder

- Create new folders for Dataverse records on SharePoint
- Aligned with Dynamics 365 SharePoint integration
- Improved management and searchability of files



Run One-Click-Action

- Execute One-Click-Actions in Power Automate
- Avoid complex logic in Flows (e.g., conditional templates)
- Re-use existing OCAs in Flows

Ressources:

- [DocuSign integration of DocumentsCorePack](#)
- [Adobe Sign integration of DocumentsCorePack](#)
- [One-Click-Actions in DocumentsCorePack](#)

One Click Actions: Preconfigure your document process



1. Document generation

- What document should be generated?
 - Template selection(Conditional logic)
 - Output format

Example: Invoice to be generated as PDF



2. Document Processing & Delivery

- How should the document be processed?
 - Save to SharePoint
 - Send for e-Signature

Example: Save to SharePoint & send by Email

Process Invoice

Create PDF, send by Email & Save to SharePoint



Key benefits:

- Simplify your document process to be available on a single click
- Powerful One-click-Action Designer (Conditional logic, Display rules, Fetch...)



1. E-signing automation via Flow
2. One-Click-Actions
3. Create SharePoint folder

Roadmap:

1. V3 ETA: March 2023
 1. Combined Action: Create & process documents in a single Action
 2. Improved documentation & inline help



4. Empower your Canvas App

- Add Document capabilities to your Canvas App
- All 20+ Connector Actions available
- Generated document returned to App for visualization & processing

```
DocumentsCorePack.CreateDocumentJob(  
    DD_Template.Selected.ptm_mscrmaddons_dcptemplatesid;  
    BrowseGallery1.Selected.Quote;  
    If(CB_eSignature.Value= true; "docx"; "pdf");  
    {SaveToSharepoint: true}  
)
```

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Name

ThinkPads & Network Service

Tota...

0

Created On

01.04.2022 10:41

Estimated Completi...

Template:

Quote_Base_EN.docx

▼

☒ Send for e-Signature

Generate Quote

Send for Signature

✓

Document has been generated

↓

[Dunder Mifflin-QUO-01023-M8G6C5.docx](#)

✍

[Sign document Now \(In-Person\)](#)

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Schütterlettenweg 23

8045 Graz

Germany

Graz, 4/4/2022

Quote #QUO-01022-S9J8D6

DocumentsCorePack XXL (300-600 Users) Professional document generation and processing in Microsoft Dynamics 365!	1	€ 8 280,00	€ 8 280,00
AttachmentExtractor XXL (300-600 Users) Database space is expensive - this is why we developed AttachmentExtractor. Save precious database space in Dynamics 365 by extracting attachments from your Dynamics 365 environment to an alternative storage.	1	€ 4 980,00	€ 4 980,00
Subtotal:			€ 13 260,00
Tax:			€ 0,00
Discount (%):			€ 0,00
Total:			€ 13 260,00

This quote is valid for 30 days from today.

After receipt of payment in full we will send you the permanent license key for the software by e-mail.

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Bank:

Steiermaerkische Bank und Sparkassen AG

Address:

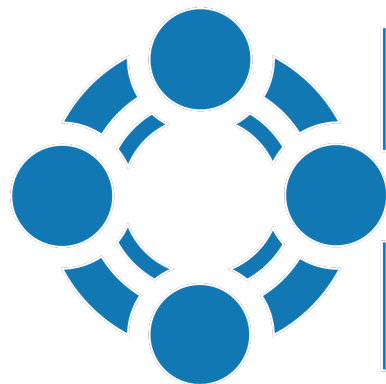
Sparkassenplatz 4, 8010 Graz, Austria

Free Trial

- **Free Trials Available** for all Add-Ons
- No functional limitations
- Fully supported
- ~30 minutes to get started



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