mscrm-addons.com
Your company for MS-CRM ADD-ONS!

Documents on the Go:

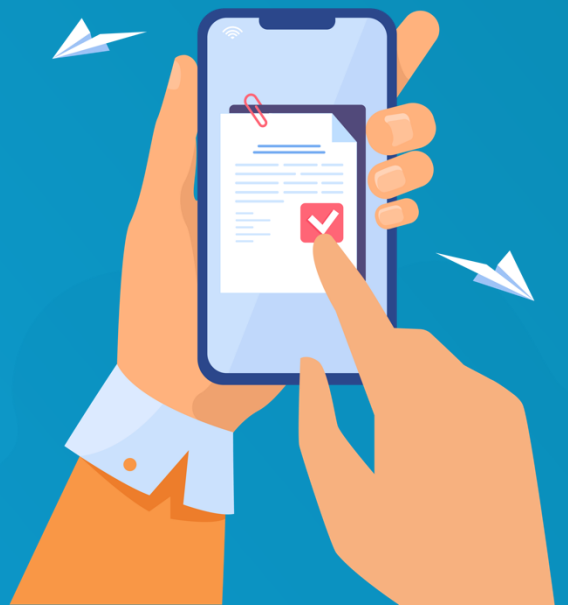
Document Generation & Processing

in

Dynamics 365 mobile apps

Clint Higley
clint.higley@mscrm-addons.com

Michael Dohr
michael.dohr@mscrm-addons.com



D365 mobile Applications

Dynamics 365 Sales

„Everything you need at your fingertips, so you can stay on top of your deals, wherever you are, better than ever before. “

Dynamics 365 Field Service

„Crafted to the field service worker’s needs with features such as **robust offline capabilities**“

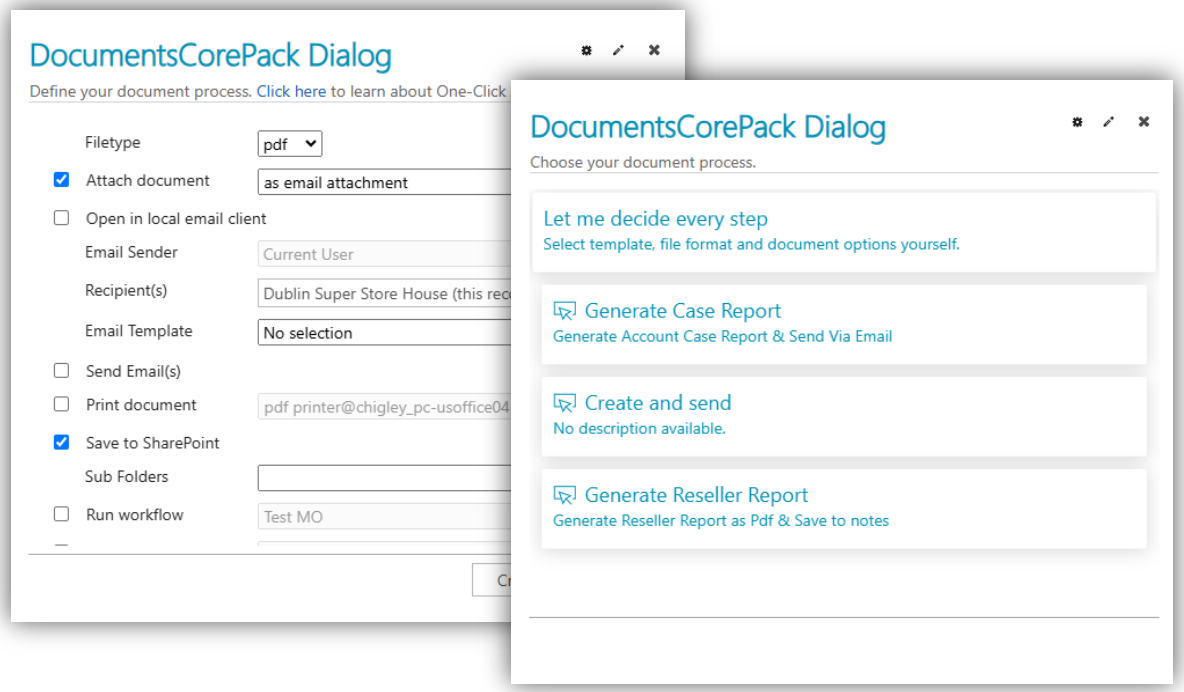
Power Apps mobile app

Model driven apps
&
Canvas apps

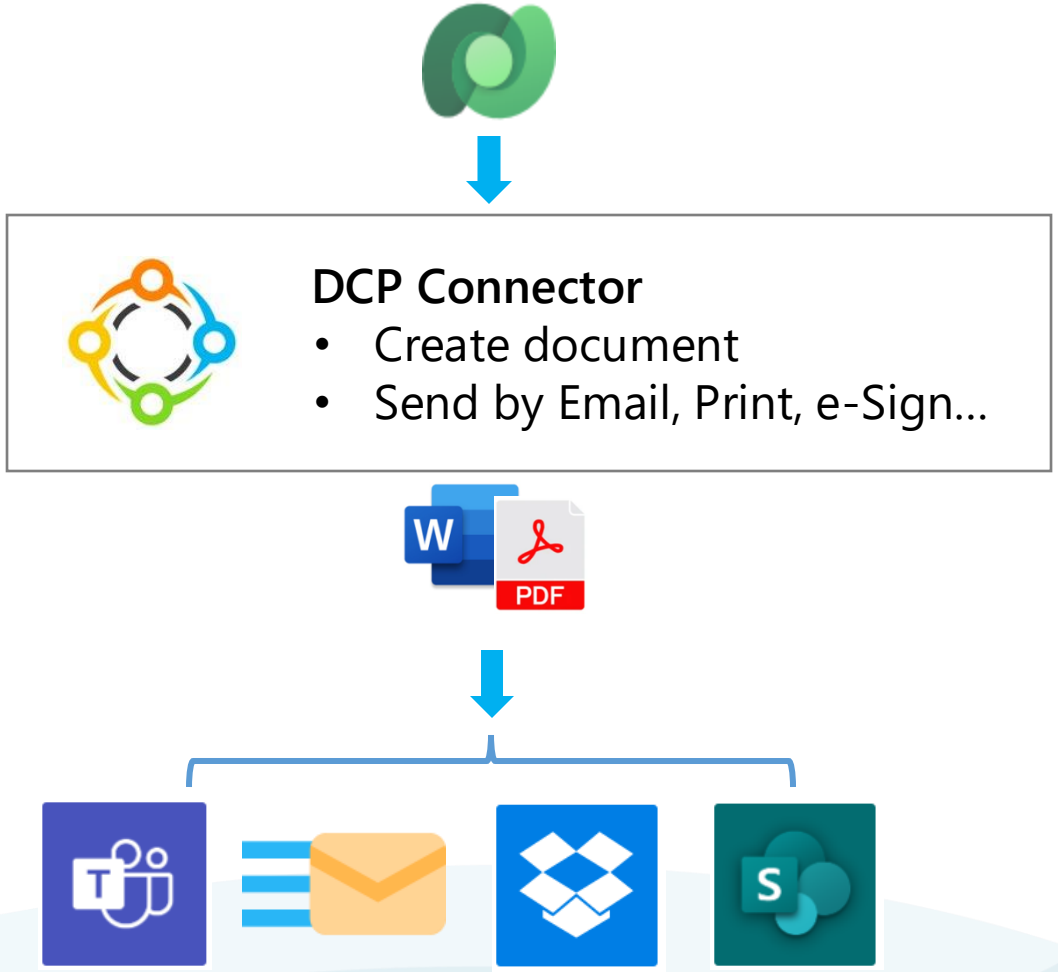
mscrm-addons.com
Your company for MS-CRM ADD-ONS!

Document Generation Options

Manual: Dialog



Automation: Power Automate



One-Click-Actions

1. Generate

- **Generate**
  - **PDF**
  - Word
  - …

2. Process & Deliver

- **Send via E-mail**
- Send for E-signature
- **Save to SharePoint**
- Print,
- Run Flow,…

3. Review

- **Document Preview**
  - Edit document

Process Quote
Generate PDF, send by E-Mail and save to SharePoint

Live Demo:

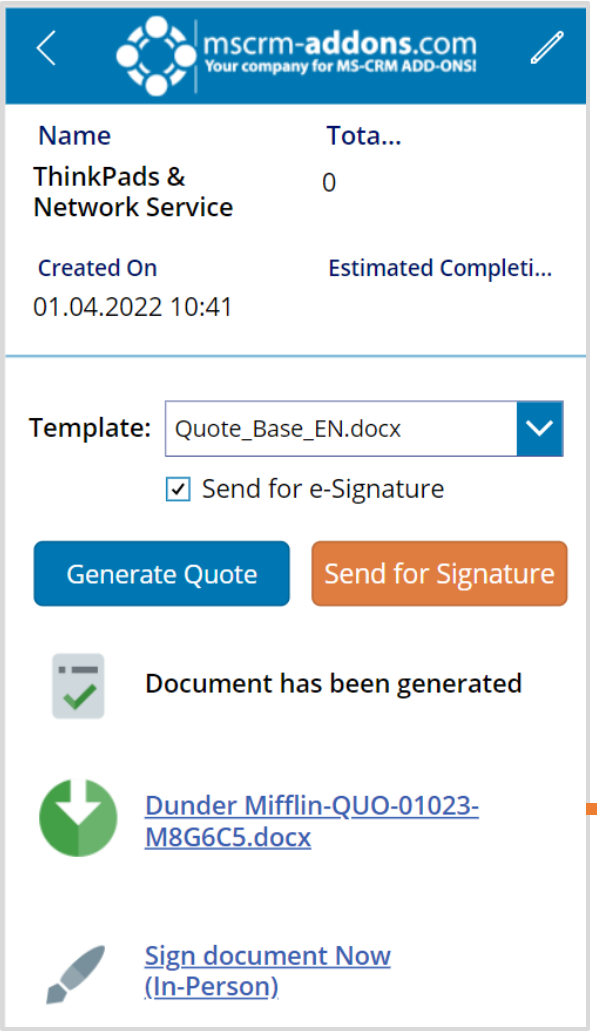
- Step-by-Step:
  - Generating Documents via the Dialog
  - Using One-Click Actions

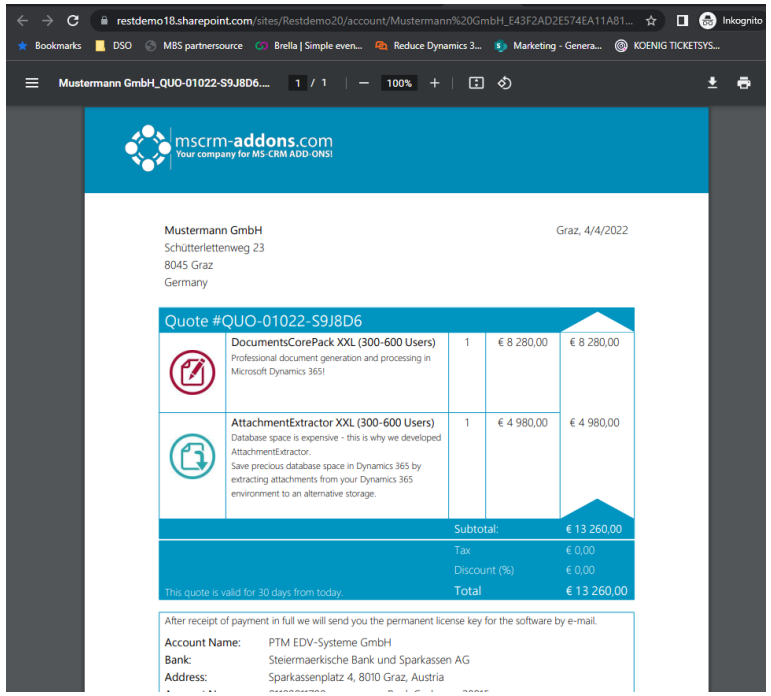
- Step-by-Step:
  - Generating documents in Field Service app

Empower your Canvas App

- Add Document capabilities to your Canvas App
- All 20+ Connector Actions available
- Generated doucment 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}
)
```



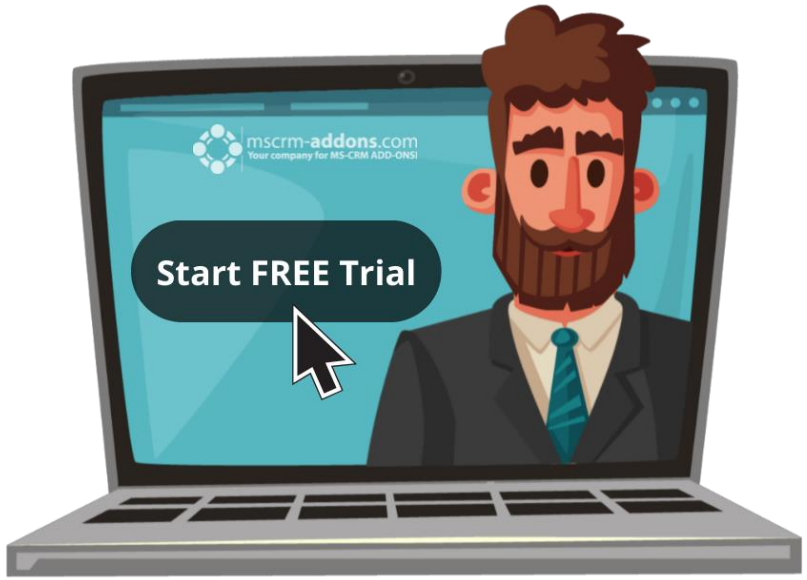


Live Demo:

- Step-by-Step:
  - Equip your Canvas App with document Capabilities

Free Trial

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



Available on
Microsoft AppSource

Thank you!

www.mscrm-addons.com

support.mscrm-addons.com

Youtube Channel (How To's, Webinars)

info@mscrm-addons.com

EMEA: +43 316 680 880

U.S.: +1 404 720 6066