





Content

| SmartBar (SB) Navigation in MS Dynamics 365 has never been easier! |
|--|
| TelephoneIntegration (TI) No actual phone needed anymore – connect your phone system to MS Dynamics 365!4 - 5 |
| DocumentsCorePack (DCP) Document generation, processing & automation based on CRM data |
| PowerSearch (PS) Finding records in MS Dynamics 365 has never been easier |
| AttachmentExtractor (AE) Save money by extracting Documents to SharePoint |
| ActivityTools (AT) Add some Outlook-Feeling to your activities in MS Dynamics 365! |
| GroupCalendar (GC) Schedule & reschedule users, groups and resources via drag & drop |
| Pricelist |



Who we are

mscrm-addons.com is a Microsoft Gold Certified Partner, providing high quality software solutions. We have specialized in developing addons for Microsoft Dynamics 365 (CRM) for Sales, Customer Service, Field Service and Project Service Automation.

Why mscrm-addons.com?

We strive to develop products that are practical, easy to use and innovative. We aim to provide technical solutions that exactly meet our customer's needs. Our well trained, highly certified staff and our excellent knowledge of Microsoft technologies guarantee that we provide only the best solutions for our customers.



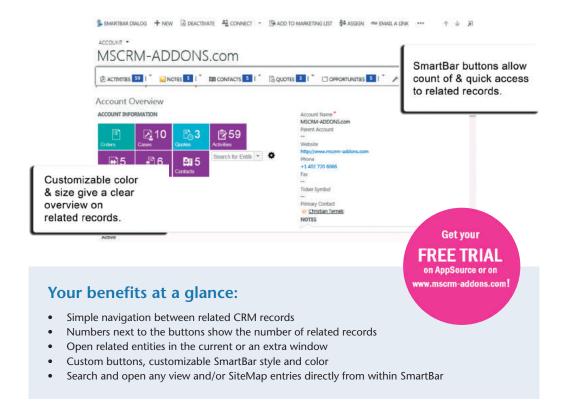
SmartBar (SB)

Navigation in Microsoft Dynamics 365 has never been easier!

How does it work?

To access related records, SmartBar offers buttons that allow a simple switch between entities.

- Simple back & forth navigation within CRM
- Numbers next to the button show the amount of related records per entity
 - o E.g. the number of quotes, orders, etc. related to the opened record is counted
- Drag & drop functionality enables users to change the buttons' order easily
- Easy to install and configure
- Display SmartBar in Standard or Metro Style, a vertical/horizontal order and various colors
- Create custom buttons (Javascript Function, Links, Views, EntitylSiteMap, Scroll to section) easily



SmartBar is available for:





TelephoneIntegration (TI)

Connecting your phone system to Microsoft Dynamics 365 has never been easier!

Whether it is about having all calls tracked or just about dialing out of CRM easier - there is more than one good reason for having your phone system connected to CRM.

How does it work?

The main user interface is provided by a Balloon pop-up. It contains all the necessary functionalities to deal with incoming and/or outgoing calls.

Call details (duration, direction, name, time...) are automatically displayed if an incoming call is detected. The context menu provides several Dynamics 365 functionalities, such as

- Open a CRM-record
- Create a new record (e.g. Contact)
- Create a CRM activity

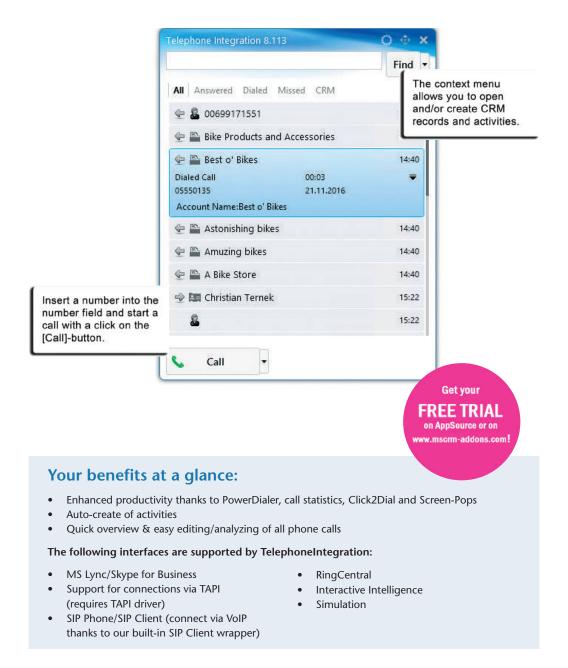
The integrated CRM Search allows you to search CRM records in the balloon. This allows to **start** a **call directly from within the balloon**.

Additionally, an outgoing call can be initiated in many different ways:

- By simply clicking on the number (Click2Dial) or with a click on the 'Call number'-button in the command bar
- From within the balloon simply by entering the phone number
- Using the clipboard integration, numbers may be copied from e.g. eMail-signatures
- 'Dialing from related records' enables you to call phone numbers from related records,
 e. g. call directly from an opportunity

Additional features

- Call statistics inside MS Dynamics 365 track every call.
 This allows you to analyze your calls based on CRM dashboards.
- The PowerDialer supports dialing lists.
 Dialing lists are created directly from campaign activities or power dialing entities in CRM.
- TI supports Unified Service Desks (USD).
 Instead of opening CRM records in your browser, the CRM records (contact/account/lead) are opened in the USD Client.



TelephoneIntegration is available for:





DocumentsCorePack (DCP)

Professional document generation, processing and automation in Microsoft Dynamics 365 has never been easier!

Over the years, DocumentsCorePack has evolved from a simple mail-merge solution to a tool that extends its technical possibilities using Microsoft Dynamics CRM as a basis for professional document generation and processing.

How does it work?

DocumentsCorePack bases on three major pillars in order to guarantee flexible, professional and reliable document processing:

The 'Dialog':

Accessible from the command bar, the dialog enables users to generate and process documents in 3 simple steps:

- Select a template
- Choose document action and
- Preview

The Dialog can be customized according to your business requirements.

Document Automation:

DocumentsCorePack is fully integrated into CRM processes, like workflows or dialogs. Thus, all document generation and processing capabilities can be fully automated. Next to reducing your users' workload, the add-on will help you to standardize your internal and external documents.

Template Design:

The easy, intuitive and powerful handling of the DocumentsCorePack Template Designer extends the capabilities of Microsoft Word with an interface to Microsoft Dynamics 365. Next to simple mapping of CRM fields, it provides a lot of additional features to ensure that our tool is capable to cover your needs. It has predefined fields, so called Mail Merge Fields. These are references to attributes in the MS Dynamics 365 system.

General Functionalities & Document Generation/Processing Comparison Chart

(DocumentsCorePack vs. MS Dynamics 365 (Native) Functionalities and Processing)

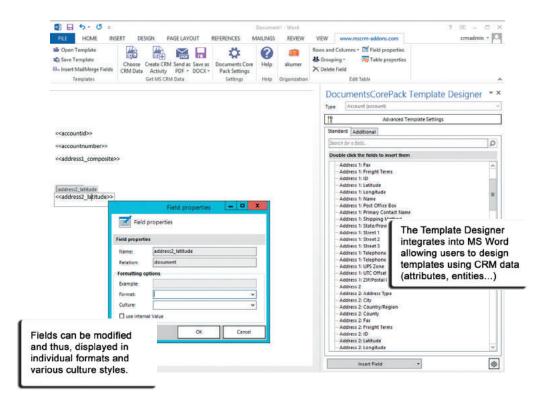
| Features | DocumentsCorePack | Native document generation |
|--|--------------------------|--------------------------------|
| running on server • as plugin • as separate service | v v | V |
| DocumentsCorePack Dialog | ✓ | 0 |
| One click document generation | ✓ | 0 |
| Create document in workflow | ✓ | v |
| Create document with dynamic names | ✓ | 0 |
| Supported file types | .docx, .pdf, .html, .txt | .docx |
| Generate activities (e.g. email with document attached) | V | 0 |
| Generate email messages | V | 0 |
| eSignature integration | V | 0 |
| Define Commands (e.g. Create document & send by email) | V | 0 |
| Secure your .pdf using a password | V | 0 |
| Advanced security settings for .pdf-files | V | 0 |
| Attach to email | V | 0 |
| Run workflow | ✓ | 0 |
| Save documents to SharePoint or local device | ✓ | 0 |
| Create SharePoint locations | ✓ | 0 |
| Write Metadata to SharePoint | ✓ | 0 |
| Attach as note | V | Note located at primary record |
| Configurable save locations (SharePoint, fileshare) | ✓ | 0 |
| Attach to letter | v | 0 |
| Print documents | V | 0 |
| with Network printer | V | 0 |
| with Google printer | V | 0 |
| Protect fillable .pdf form fields | V | 0 |
| Document Preview | V | 0 |
| Edit documents during document generation (for quick and easy mass mailings) | V | 0 |
| Batch processing from CRM Grid | V | 0 |
| Combine documents | V | 0 |
| | | |



Template Design Comparison Chart

(DCP Template Design vs. MS Dynamics 365 (Native) Document Generation)

| Features | DocumentsCorePack | Native document generation |
|---|-------------------|----------------------------|
| Microsoft Word Template Designer | v | ✓ |
| Demo templates (ready to use) | v | 0 |
| Support for custom entities | v | ✓ |
| Subcategorize templates | v | 0 |
| Related records | v | 0 |
| Relationship-types many-to-one, one-to-many, many-to-many | V | limited to one level |
| Resolve multiple relationship levels | V | 0 |
| Elimination of blank lines for addresses | V | 0 |
| Filter related records | V | 0 |
| Sorting | V | 0 |
| Grouping and Totals | V | 0 |
| Define document names | V | 0 |
| Insert Calculations | V | 0 |
| Insert Conditions | V | V |
| Insert Pictures | V | 0 |
| e-Signature Integration | V | 0 |
| Insert Docusign | V | 0 |
| Insert AssureSign | V | 0 |
| Saved as note in CRM | V | 0 |
| Entity Images | V | V |
| Saved as web-path in CRM | V | 0 |
| Insert HTML | V | 0 |
| Insert QR Codes based on CRM data | V | 0 |
| Insert dynamic hyperlinks | V | 0 |
| String manipulation | V | 0 |
| Field formatting | V | 0 |
| Aggregation support | V | 0 |
| Connect to external database | V | 0 |
| Creation of label templates | V | 0 |
| Sub-template support | V | 0 |
| Easy generation of tables | V | 0 |
| Template testing capabilities | V | 0 |
| | | |





Your benefits at a glance:

- Professional document generation from the Command Bar based on the ,Dialog'
- Document Automation via workflows and dialogs
- Various processing options supported
 (Attach to email or letter activity, Auto-set eMail recipients & subject,
 eSignatures supported like AssureSign or DocuSign, trigger workflows,
 save documents to SharePoint, printing, generate email content, dynamic file names...)
- Supported file formats: .pdf, .html, .docx, .doc, .txt, .xps, .pnq, .ipeq, .epub, .bmp, and .msq

DocumentsCorePack is available for:





AttachmentExtractor (AE)

Moving documents from Microsoft Dynamics 365 to SharePoint or a file share has never been easier!

Up to 70 percent of the CRM database consists of documents stored as notes and attachments. Time to tidy up!

How does it work?

Thanks to AttachmentExtractor there is a simple way to reduce your CRM Data Storage. The tool copies or moves files to either SharePoint or a file share. These files are replaced with links inside CRM so users will not see a difference when accessing the files!

- Configure AttachmentExtractor Online AE is hosted on MS Azure!
- AE is as well available as ,On Premise' solution
- Archive data AE allows data storage based on date/time values
- Local ability of sensitive documents
- No change in CRM UI Users access files directly from within CRM
- Blacklist/Whitelist
- Dynamic Save Locations

Select save locations based on CRM attributes and add custom logic to the extraction process.

• Set up a **scheduler** to perform tasks (For example, extract weekly, daily...)



Get your
FREE TRIAL
on AppSource or on
www.mscrm-addons.com!

Your benefits at a glance:

- Move your files to SharePoint or a fileshare
- Look & Feel: No difference for MS Dynamics 365 users
- Touch only eMails related to certain entities (Whitelist) or block entities (Blacklist)
- Save money: Reduce storage costs by extracting documents
- Analyze and evaluate your database structure

AttachmentExtractor is available for:



PowerSearch (PS)

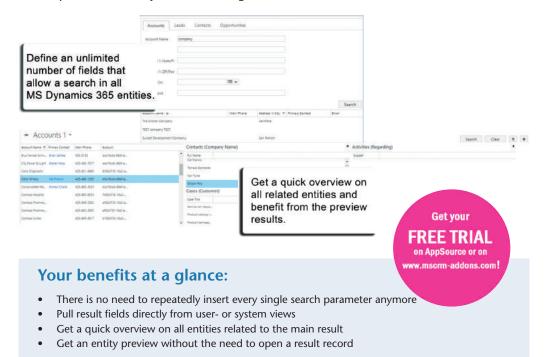
Finding records in Microsoft Dynamics 365 has never been easier!

How does it work?

Providing a powerful search routine, PowerSearch combines the simplicity of the CRM standard search with the capabilities of Advanced Find!

- Use multiple fields for frequently used search queries
- Preconfigure & save certain search fields
- Use the global configuration in order to define search and result fields
- Search results and even records related to the search result may be opened directly from the result window
- Preview fields provide you with more than simple results. With a click on the main entity you get a preview on related entities

Next to the features above mentioned, PS provides a SPI (Single Point of Information) from where quick access to any CRM record is given.



PowerSearch is available for:





ActivityTools (AT)

Adding some Outlook-feeling to Microsoft Dynamics 365 has never been easier!

How does it work?

The practical list and preview pane allows you to browse through the activity list while getting an instant preview of the selected activity.

ActivityTools' practical Outlook-like preview gives you a quick, but profound overview on all related activities.

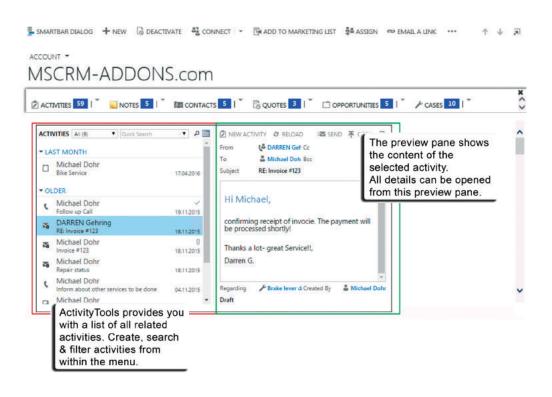
Similar to common email-clients, the add-on loads records "on-demand" in reversed chronological order and comes with various filter and search options to effectively search activities inside Microsoft Dynamics 365.

With its email features, ActivityTools guarantees a super user-friendly e-Mailing experience in CRM!

Views & Email-features in detail

ActivityTools offers several comfortable display options, because the preview of each Microsoft Dynamics 365 (CRM) entity can be configured individually.

- Entity-related view: Shows all activities (email, task, phone call...) related to a CRM record
- User-related view: Shows all activities related to the current user
- All views are similar to MS Outlook. They consist of a list of all activities associated
 to a CRM record on the left and a preview-pane on the right side
- Feel free to embed the previews as Entity-form, Form-menu, Dashboards or SiteMap in CRM
- The included search feature allows you to access search results directly in CRM
- The Layout Designer quarantees fully customizable layouts



Your benefits at a glance:

- Different previews for varying purposes
- Search- and grouping options
- Get an overview of your activities in an Entity-form, in the Form-Menu, in a Dashboard or as a CRM Sitemap
- Define a default sender (e.g. support/sales) for individual users
- Customize your unique activity layout

ActivityTools is available for:





GroupCalendar (GC)

Scheduling users, teams & resources in Microsoft Dynamics 365 has never been easier!

How does it work?

Multiple views combined with practical features like color-coding or drag & drop rescheduling and work-hour integration guarantee ideal conditions for effective calendar management.

Simultaneous view of activities

- o Select users, user groups, resources or a specific user-group defined by an Advanced Find
- Define and save user groups or default users separately
- Display certain time spans
 - o GC displays working hours and time-off specified in CRM for users and resources
- Benefit from color-coding
 - o Get a quick overview by defining specific colors for each scheduled activity

• Print option & print preview

- Select certain activities to be displayed in the preview and get an overview of all meetings of a random month
- Embed our add-on into any entity
- Fully customizable content

More than 6 different view provide you with an overview on all scheduled activities and resources:

Day-, week-, month-view

o All activities within the specified time-span can be simply opened with a double-click. In the month overview, activities are displayed in an Outlook like style.

TopDown-view

Displayed in a daily or weekly view, activities are separated per user. View hours either in a '24 hours' or in a 'business hours' mode. Reschedule activities via drag & drop.

Gantt-view

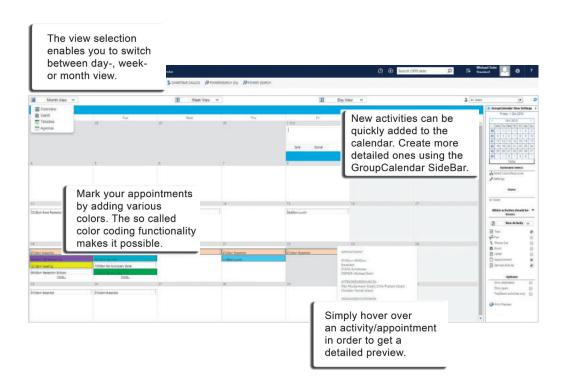
o Reschedule appointments and assign unscheduled activities easily via drag and drop. This is also possible for activities between different users.

Timeline-view

o Provides you with a detailed overview of all user' appointments and activities, listed chronologically. Create activities with a simple right click in the selected time-slot.

Agenda-view

o This view provides a plain list of activities, optionally grouped by date and/or resources.



Your benefits at a glance:

- Scheduling users, teams and resources at the same time
- Define/select/display users, teams, resources and/or resource groups
- Benefit from more than 6 different views
- Display time-off and working hours of your users
- Color coding supported for all activity types
- Customize your calendar according to your requirements
- Create all activity types directly in GroupCalendar
- Print & Print preview option
- GroupCalendar can be embedded into a CRM entity of your choice

GroupCalendar is available for:





Pricelist 2017 in EUR

| | Norma | al License* | "PerUser" License** | | |
|-----------------------------|-------|---------------------|---------------------|---------------------|--|
| Product | Price | Support & Maint. *1 | Price | Support & Maint. *1 | |
| DocumentsCorePack Client | € 55 | € 12 | € 110 | € 24 | |
| GroupCalendar (GC) | € 55 | € 12 | € 110 | € 24 | |
| ActivityTools (AT) | € 40 | € 12 | € 80 | € 24 | |
| PowerSearch (PS) | € 40 | € 12 | € 80 | € 24 | |
| SmartBar (SB) | € 20 | € 12 | x | x | |
| TelephoneIntegration (TI) | | | | | |
| TI Server (5 CALs included) | х | x | € 600 | € 120 | |
| TI Client CAL | х | x | € 110 | € 24 | |

| Value Package | | |
|---|-------|---------------------|
| | Price | Support & Maint. *1 |
| Value Package (GC, AT, PS, SB combined) | € 110 | € 24 |

Subscription Prices

| | Normal | License* | "PerUser" License** | | |
|---------------------------|---------|----------|---------------------|----------|--|
| Product | monthly | annually | monthly | annually | |
| DocumentsCorePack Client | €5 | € 4,25 | € 10 | € 8,50 | |
| GroupCalendar (GC) | € 5 | € 4,25 | € 10 | € 8,50 | |
| ActivityTools (AT) | € 3,50 | €3 | €7 | € 6 | |
| PowerSearch (PS) | € 3,50 | €3 | €7 | €6 | |
| SmartBar (SB) | € 2,50 | €2 | x | x | |
| TelephoneIntegration (TI) | x | х | € 10 | € 8,50 | |

^{*} you will need to buy as many licenses as there are active users in your CRM system
** "PerUser"-License of GC, AT, PS and DCP-CB requires a minimum amount of 10

^{*1 ...} Support & Maintenance price per user/year (year one included in the initial purchase)

^{*2 ...} TD = Template Designer included in this package

*3 ... The minimum term of contract is one year; billing is conducted once a year (monthly rate x 12).

Pricelist 2017 in EUR

| DocumentsCorePack (DCP) | | | | | | |
|-------------------------|-------------------|---------|--------------|----------|-----------------|-------|
| Package | Perpetual License | | Subscription | | | |
| | | | monthly | annually | Documents incl. | TD *2 |
| XS (≤ 10 users) | € 600 | € 120 | € 45 | € 39 | 500 | 1 |
| S (11 - 30 users) | € 1.100 | € 220 | € 75 | € 69 | 1.000 | 1 |
| M (31 - 80 users) | € 2.750 | € 550 | € 125 | € 109 | 5.000 | 2 |
| L (81 - 140 users) | € 4.600 | € 920 | € 169 | € 149 | 10.000 | 2 |
| XL (141 - 300 users) | € 9.300 | € 1.860 | € 345 | € 299 | 25.000 | 5 |
| XXL (301 - 600 users) | € 17.500 | € 3.500 | € 655 | € 569 | 50.000 | 10 |
| Enterprise (600+ users) | on requ | uest | on request | | on request | |
| Additional Packages | | | | | | |
| 1,000 documents | х | | € 10 | €7 | x | |
| 1 Template Designer | х | | €5 | € 4,25 | х | |

| AttachmentExtractor (AE | E) | | | | |
|-------------------------|-------------------|---------------------|--------------------------------|------------|---------|
| Package | Perpetual License | | Perpetual License Subscription | | ription |
| | Price | Support & Maint. *1 | annually *3 | Bandwidth | |
| XS (≤ 10 users) | € 600 | € 150 | € 39 | 2,5 | |
| S (11 - 30 users) | € 1.100 | € 275 | € 69 | 5 | |
| M (31 - 80 users) | € 2.200 | € 550 | € 99 | 10 | |
| L (81 - 140 users) | € 2.750 | € 690 | € 129 | 15 | |
| XL (141 - 300 users) | € 4.600 | € 1.150 | € 199 | 20 | |
| XXL (301 - 600 users) | € 7.600 | € 1.900 | € 349 | 25 | |
| Enterprise (600+ users) | or | on request | | on request | |



Pricelist 2017 in USD

| | Norma | al License* | "PerUser" License** | | |
|-----------------------------|-------|---------------------|---------------------|---------------------|--|
| Product | Price | Support & Maint. *1 | Price | Support & Maint. *1 | |
| DocumentsCorePack Client | \$ 70 | \$ 17 | \$ 140 | \$ 34 | |
| GroupCalendar (GC) | \$ 70 | \$ 17 | \$ 140 | \$ 34 | |
| ActivityTools (AT) | \$ 50 | \$ 17 | \$ 100 | \$ 34 | |
| PowerSearch (PS) | \$ 50 | \$ 17 | \$ 100 | \$ 34 | |
| SmartBar (SB) | \$ 25 | \$ 17 | x | x | |
| TelephoneIntegration (TI) | | | | | |
| TI Server (5 CALs included) | х | x | \$ 800 | \$ 170 | |
| TI Client CAL | х | x | \$ 140 | \$ 34 | |

| Value Package | | |
|---|--------|---------------------|
| | Price | Support & Maint. *1 |
| Value Package (GC, AT, PS, SB combined) | \$ 140 | \$ 34 |

Subscription Prices

| | Normal | License* | "PerUser" License** | | |
|---------------------------|---------|----------|---------------------|----------|--|
| Product | monthly | annually | monthly | annually | |
| DocumentsCorePack Client | \$ 7 | \$ 5.95 | \$ 14 | \$ 11.90 | |
| GroupCalendar (GC) | \$ 7 | \$ 5.95 | \$ 14 | \$ 11.90 | |
| ActivityTools (AT) | \$ 5 | \$ 4.25 | \$ 10 | \$ 8.50 | |
| PowerSearch (PS) | \$ 5 | \$ 4.25 | \$ 10 | \$ 8.50 | |
| SmartBar (SB) | \$ 3.5 | \$ 3 | х | х | |
| TelephoneIntegration (TI) | х | x | \$ 14 | \$ 11.90 | |

^{*} you will need to buy as many licenses as there are active users in your CRM system
** "PerUser"-License of GC, AT, PS and DCP-CB requires a minimum amount of 10

^{*1 ...} Support & Maintenance price per user/year (year one included in the initial purchase)

^{*2 ...} TD = Template Designer included in this package

*3 ... The minimum term of contract is one year; billing is conducted once a year (monthly rate x 12).

Pricelist 2017 in USD

| DocumentsCorePack (DCP) | | | | | | |
|-------------------------|-------------------|----------|--------------|----------|-----------------|-------|
| Package | Perpetual License | | Subscription | | | |
| | | | monthly | annually | Documents incl. | TD *2 |
| XS (≤ 10 users) | \$ 800 | \$ 160 | \$ 56 | \$ 49 | 500 | 1 |
| S (11 - 30 users) | \$ 1,500 | \$ 300 | \$ 99 | \$ 89 | 1,000 | 1 |
| M (31 - 80 users) | \$ 3,700 | \$ 740 | \$ 169 | \$ 149 | 5,000 | 2 |
| L (81 - 140 users) | \$ 6,200 | \$ 1,240 | \$ 229 | \$ 199 | 10,000 | 2 |
| XL (141 - 300 users) | \$ 12,500 | \$ 2,500 | \$ 459 | \$ 389 | 25,000 | 5 |
| XXL (301 - 600 users) | \$ 23,600 | \$ 4,720 | \$ 869 | \$ 759 | 50,000 | 10 |
| Enterprise (600+ users) | on requ | uest | on request | | on request | |
| Additional Packages | | | | | | |
| 1,000 documents | х | | \$ 13 | \$ 9.17 | x | |
| 1 Template Designer | х | | \$ 7 | \$ 6 | х | |

| AttachmentExtractor (AE) | | | | |
|--------------------------|-------------------|---------------------|--------------|------------|
| Package | Perpetual License | | Subscription | |
| | Price | Support & Maint. *1 | annually *3 | Bandwidth |
| XS (≤ 10 users) | \$ 800 | \$ 200 | \$ 49 | 2.5 |
| S (11 - 30 users) | \$ 1,500 | \$ 375 | \$ 89 | 5 |
| M (31 - 80 users) | \$ 2,920 | \$ 730 | \$ 129 | 10 |
| L (81 - 140 users) | \$ 3,700 | \$ 925 | \$ 169 | 15 |
| XL (141 - 300 users) | \$ 6,200 | \$ 1,550 | \$ 259 | 20 |
| XXL (301 - 600 users) | \$ 10,200 | \$ 2,550 | \$ 459 | 25 |
| Enterprise (600+ users) | on request | | on request | on request |



DocumentsCorePack

Professional document generation and processing in Dynamics 365



GroupCalendar

Effectiv Scheduling of users, teams and resources in Dynamics 365



TelephoneIntegration

Connect your phone system with Microsoft Dynamics 365



SmartBar

Smart navigation between related CRM records



AttachmentExtractor

Extract files and eMail attachments to SharePoint or a fileshare



ActivityTools

Simple overview of CRM activities Outlook - Look & Feel for eMails



PowerSearch

Combine the simplicity of CRM Search with the features of Advanced Find



Simple solutions that guarantee high productivity:

Boost Microsoft
Dynamics 365
with our add-ons!

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