DocumentsCorePack vs. Out-of-the-box Dynamics 365 Comparison Chart

Microsoft Dynamics 365 CE comes with a basic functionality to generate documents via Word templates.

This overview provides a comparison of those native capabilities vs. DocumentsCorePack for Dynamics 365 and Power Apps. Starting with key differences you will find a detailed comparison covering:

- Document Generation
- Document Processing & Delivery
- Template Design & Management

The intent of this head-to-head comparision to help you determine which option is best to meet your document generation, processing, and automation requirements.

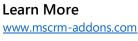| Key Differences	DocumentsCorePack	Native Dynamics 365
Microsoft Word based Template Designer (See Template Design Comparison for details)	✓ Easy to use Word Add-In	✓ XML-based mapping via developer ribbon
Mapping of Dataverse data: - Resolve relationships - Filter results - Sort results - Formatting (e.g. date, money values)	Multi-level ✓ ✓ ✓	limited to 1 level ✗ ✗ ✗
Connector for Power Automate & Power Apps - Full document automation via Flows - Document generation & processing in Canvas Apps	✓ ✓	✗
One-Click document processes Generate and process documents according to your business needs with a single click (See Document Generation & Processing Comparison)	✓ All document generation & processing options	✓ Only in Sales App Limited to PDF files
Batch document generation & delivery	✓	✗
Template management - Test templates during the design - Versioning & History - Conditional template selection - Guided provisioning between environments	✓ ✓ ✓ ✓	✗

Document Generation

Whether you need to send sales or service documents, internal reports or contracts for signature, documents are crucial in every business. Generating professional documents in a simple, streamlined and effective manner is a top priority.

In this section we compare the document generation options provided by the two solutions within the suite of Microsoft Business Applications:

Document Generation	DocumentsCorePack	Native Dynamics 365
Available in - Dynamics 365 CE - Model Driven Power Apps - Power Automate (Microsoft Flow) - Canvas Apps	✓ ✓ ✓ ✓	✓ ✓ ✗ ✗
Command bar dialog	All Dynamics 365 CE & Model Driven Apps	Only in Sales App, limited to PDF files
One-Click Actions - Generate documents - Process documents - Review & edit documents - Access restrictions via security roles	✓ ✓ ✓ ✓	✓ Only in Sales App, limited to PDF files ✗ ✗
Conditional template selection	✓	✗
Supported file types	.docx,.pdf,.html, .txt,...	.docx,.pdf
Batch operations - Batch document generation - Batch document processing	✓ ✓	✗
Gemerate documents consisting of multiple elements from different sources	Combine templates, SharePoint & Note documents	✗
Dynamic document names	✓	✗
Use data from an external database	✓	✗
Incorporate user input during document creation	✓	✗
Document preview	✓	Only in Sales App
Edit documents upon creation before processed	✓ In MS Word, the defined process continues	✓ In MS Word, manual processing required

Document Processing, Delivery & Automation

Every document generated has a purpose. Thus, providing options to process & deliver documents will not just speed up your document-related business processes, reduce your user's workload but also bridge the gap to full document automation.

This section outlines the comparison of options to process, deliver & automate your documents:

Document Processing & Delivery	DocumentsCorePack	Native Dynamics 365
Generate email attachments	✓	Only in Sales App, limited to PDF files
Generate email content	✓	✕
Generate and attach to activity	All activity types	✕
Attach as a note	✓	Only in Sales App, limited to PDF files
Save to SharePoint	All file types	Only in Sales App, limited to PDF files
- Dynamic save locations	✓	✕
- Create SharePoint locations	✓	✕
- Write metadata to SharePoint	✓	✕
Send for e-Signing		✕
- AdobeSign	✓	
- DocuSign	✓	
- AssureSign	✓	
Protect files (PDF & password protection)	✓	✕
Run processes upon document generation		✕
- Flows	✓	
- Workflows/Actions	✓	
Printing		✕
- Local/Network printing	✓	
- Cloud printing	✓	
Combine documents	✓	✕

Document Automation	DocumentsCorePack	Native Dynamics 365
Via Dynamics 365 workflows	✓ All document generation & processing options	✓ Only attach as note
Via Power Automate	✓ DocumentsCorePack Connector	✕

Template Design

„Using the power of MS Word" is key in enabling every user to design good-looking and professional documents.

This section compares the features & options to map the data you need from Microsoft Dataverse into your documents:

Template Design	DocumentsCorePack	Native Dynamics 365
Microsoft Word Template Designer	✔ via Word Add-In	✔ Via developer ribbon
Relationships		
- One-to-Many, Many-to-One, Many-to-Many	✔	✔
- Multiple levels	✔	✘
- Filter related records	✔	✘
- Sort related records	✔	✘
Data Manipulation		✘
- Grouping	✔	
- Calculations	✔	
- String manipulation	✔	
Conditions & onditional content (if / else)	✔ Condition Designer	✔ Word Field Function
Formatting of Datverse data		✘
- Field-type specific formatting (e.g. date, money fields)	✔	
- Conditional Formatting	✔	
Dynamic Images		
- Entity images	✔	✔
- Images from notes (stored in Dataverse)	✔	✘
- Images from URL (stored in Dataverse)	✔	✘
Dynamic Content		✘
- Charts (presenting Dataverse data)	✔	
- Document name	✔	
- Hyperlinks	✔	
- QR Codes	✔	
- HTML (stored in Dataverse)	✔	
- Filters	✔	
e-Signature: Predefine tags for		✘
- AdobeSign	✔	
- DocuSign	✔	
- AssureSign	✔	
Work with Sample Data	✔	✘

Template Management	DocumentsCorePack	Native Dynamics 365
- Testing templates while designing	✔	✘
- Template versioning	✔	✘
- Template history (revisions)	✔	✘
- Guided Transfer between environments	✔	✘
- Template reporting & utilization statistics	✔	✘