

CASE STUDY

Efficient and adaptable solutions for generating customized documents



ABOUT

Georg Fischer has been a leading supplier of piping systems since 1802. GF has three divisions Piping Systems, Casting Solutions, and Machining Solutions. GF Piping Systems is the global water, chemicals, and gas transportation expert.



CHALLENGE

GF had trouble generating and attaching documents to an email and sending them using Outlook. Adding related fields into a template using multiple relationship levels and filters was impossible. Additionally, eliminating blank lines from addresses in a Dynamics 365 template was not possible.



SOLUTION

While searching for a document generation tool integrated with their CRM for daily operations, GF Piping Systems came across the DocumentsCorePack solution from mscrm-addons. It simplified the document generation process and provided various pre-configured options to select.

01 ► Enhancing Document creation and generation.

DocumentsCorePack enabled GF to create customized documents tailored to their needs. It enabled them to include the information from Dynamics 365 records and allowed these documents to be attached to emails with just a few clicks using our DCP dialog. The One-Click actions has helped them automate the documentation process with a workflow that files the gerated documents as “Attachments”. It also automatically creates a record of all the documents that are attached as a note.

At-a-glance

Customer: Georg Fischer Piping Systems Ltd

Website: www.georgfischer.com

Customer Size: 6,8k+ employees

Country: 34 sales & 34 production companies

Industry: Water, Chemicals, Gas, Cruise, Ships, Hospitals, Airplanes

02 ► Simplified document generation with template designer



Georg Fischer used DocumentsCorePack templates across 13 countries with about 323 different templates across companies. Their team found the functionality simple and easy to understand by everyone. The customisation feature is extensively used on their templates and the number of templates are increasing gradually across their dynamics 365 environment. This also enabled them to batch process documents. Additionally, it significantly reduced the time and cost associated with documentation.

03 ► Maximized efficiency and cost savings



DocumentsCorePack has significantly reduced the time and effort required for everyday documentation tasks. By streamlining these processes, GF have experienced a notable increase in productivity. Additionally, the product's pricing structure has provided further benefits, allowing them to save costs. The ease of completing tasks with DocumentsCorePack has not only improved efficiency but also contributed to overall cost saving.



CONCLUSION

In conclusion, Georg Fischer effectively incorporated DocumentsCorePack into their day-to-day business, resulting in fast and flexible document generation. DocumentsCorePack significantly reduced the time and cost of performing various business document tasks. The team was impressed with the variety of features that the solution offered such as batch processing, triggering multiple actions.

Are you ready to revolutionize the way you handle your documents too?



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MSCRM_ADDONS develop intelligent tools that integrate well in Dynamics 365. The tools are fast, simple to use but have a huge array of features under the hood. Their tools are continually improved and supported at an elevated level. I would highly recommend their products. Based on our experience, we can testify that DocumentsCorePack is a sophisticated document generation offering. I would also like to thank everyone at MSCRM_ADDONS for their never-ending support and the development of bespoke solutions for our organization. Thank you!

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Boota Chaggar, Global Technical Owner for MSCRM Dynamics
(Georg Fischer Piping Systems Limited)