mscrm-**addons**.com
DocumentsCorePack
for Microsoft Dynamics CRM

DocumentsCorePack Template Designer for MS CRM 2015/2016

Ver.: 0.1, June 2016

Template Designer Guide
(How to work with DocumentsCorePack Template Designer for MS CRM 2015/2016)

Content

Preamble

This documentation is intended to guide you through the generation and design process of templates in DocumentsCorePack.

This guide applies to version 7.110 (8.110) or higher.

Please read this document carefully and follow the steps as described to achieve the described results.

Target Audience

This guide is intended for users designing templates for DocumentsCorePack who have the following minimum skills:

- Basic Knowledge of Microsoft Office Word
- Basic Microsoft Dynamics CRM Knowledge

Purpose of the DocumentsCorePack template designer?

DocumentsCorePack Templates facilitates – among other things - the creation and modification of DocumentsCorePack Templates in Microsoft Dynamics CRM. It has predefined fields, so-called Mail Merge Fields. These are references to attributes in the Microsoft Dynamics CRM-system (For example Company, Address, Contact, …).

Templates can be created for each MS Dynamics CRM entity (For example Contact, Opportunities…). They facilitate the generation of documents.

For example:

1. Account-templates
2. Quote- and invoice-templates
3. Marketing-list-templates for multi-mails etc.

Basically, there are two different types of templates (deprecated Word Standard and Office Open XML).

We recommend you to use the DocumentsCorePack Templates (docx) only, because they are not limited to a single data source. Due to this fact, our DCP Templates can resolve any relationships between the entities. In the course of the next chapters, you will learn more about the basics of DocumentsCorePack template designer, how to create a completely new template and how to handle already created templates.

1 DocumentsCorePack Template Designer Basics

The DocumentsCorePack Template Designer is a locally installed add-in for Microsoft Office Word which enables you to

- insert placeholders for CRM Data (so called 'Merge Fields') within templates.
- resolve relationships to gather data from related data from CRM records.
- insert advanced objects like QR-Codes or calculations based on CRM data.
- pull fields from standard and custom entities into templates.
- filter and sort once retrieved records in any imaginable way in the templates.
- handle one-to-many and many-to-many relationships easily.
- place if and else conditions in order to define conditional content inside templates.
- set culture and format of money, integer and decimal fields inside templates.
- generate dynamic document names and dynamic save locations for templates.
- insert dynamic pictures into templates
- insert hyperlinks into templates.
- define arithmetic operations and set the corresponding variables as CRM fields.
- insert sub-templates or other documents to the main document or template.
- configure various settings in the templates.

The DocumentsCorePack Template Designer can be easily accessed via the www.mscrm-addons.com – tab in the MS Word command bar.

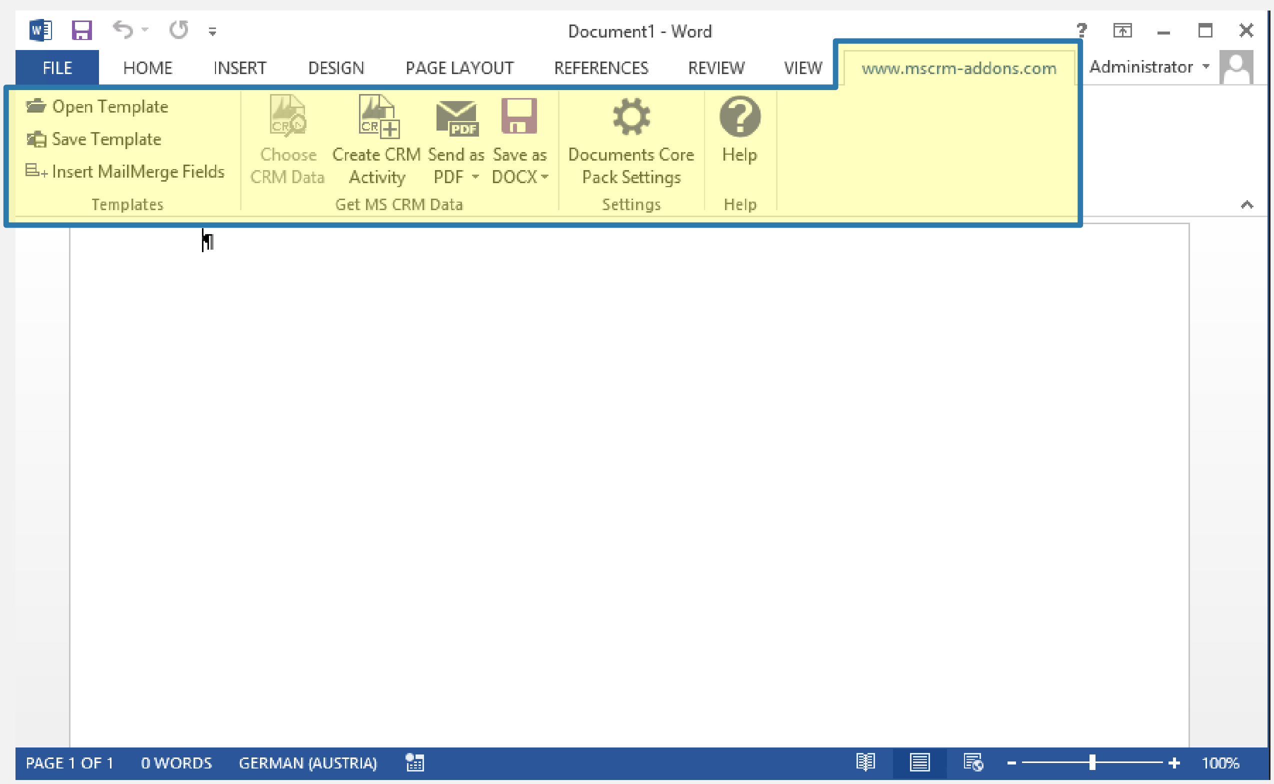


Figure 1: Microsoft Office Word with mscrm-addons.com Ribbon

1.1 The www.mscrm-addons.com tab

There are two main menu items in the www.mscrm-addons.com tab that facilitate the creation of templates:

The dashed line (1) marks the DocumentsCorePack Client functionality that does not belong to the Template Designer guide. This section is described separately in the DocumentsCorePack ClientBased User Guide.

While the left side contains the option to save and open templates, the right side does not belong to the default items of the command bar. It only appears after inserting a field from DocumentsCorePack Template Designer in order to manage the field properties.

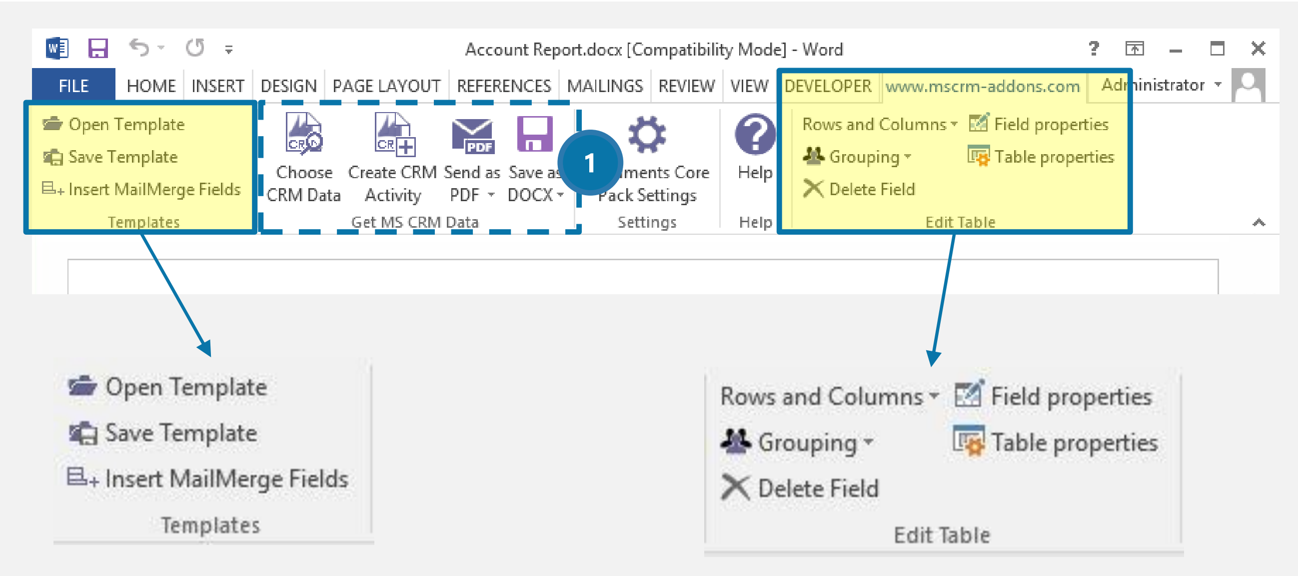


Figure 2: www.mscrm-addons.com tab details

The ***[Insert MailMerge Fields]*** button allows you to open an extended user interface to create template from scratch.

1.2 How to open the DocumentsCorePack Template Designer

Clicking on ***[Insert MailMerge Fields]*** in the www.mscrm-addons.com-tab will open the DocumentsCorePack Template Designer.

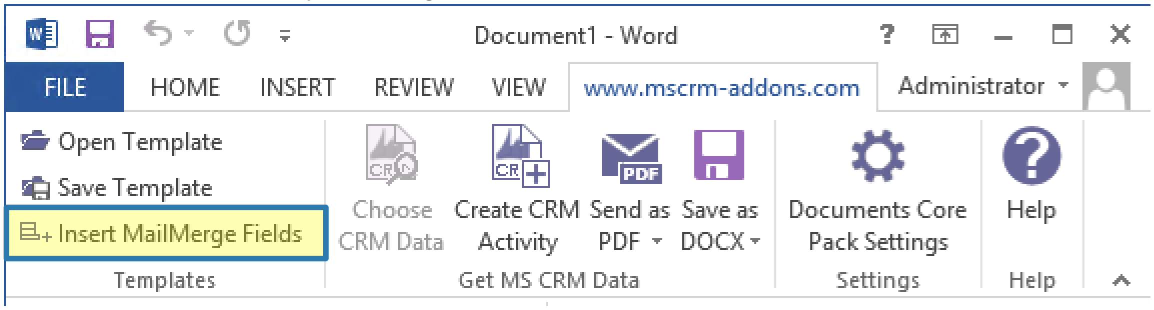
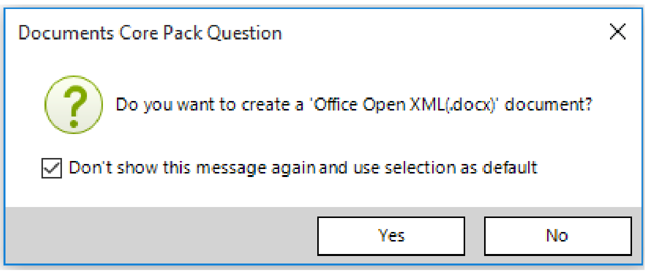


Figure 3: www.msccrm-addons.com tab



Depending on the configuration, the following message box could appear. Should this happen, please check the checkbox and click on ***[Yes]***.

Figure 4: Office Open XML (docx) question

After these steps The Template Designer will appear on the right hand side docked to your Word window.

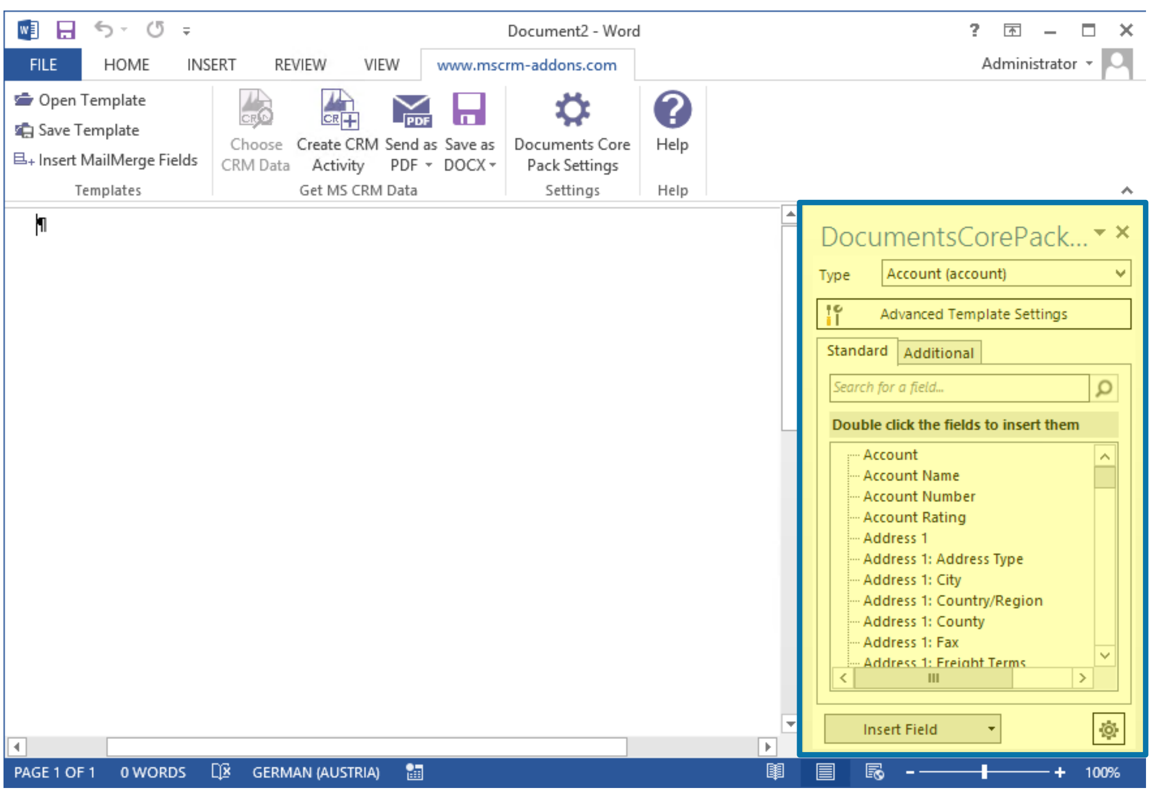


Figure 5: DocumentsCorePack Template Designer Taskpane in Word

1.3 The DocumentsCorePack Template Designer User Interface (Standard)

The DocumentsCorePack Template Designer is a task pane in Word which extends your local Word installation with the required tools to insert fields.

1.4 Standard

If you are viewing this document on your computer, you can click on the element to directly jump to the referenced topic.

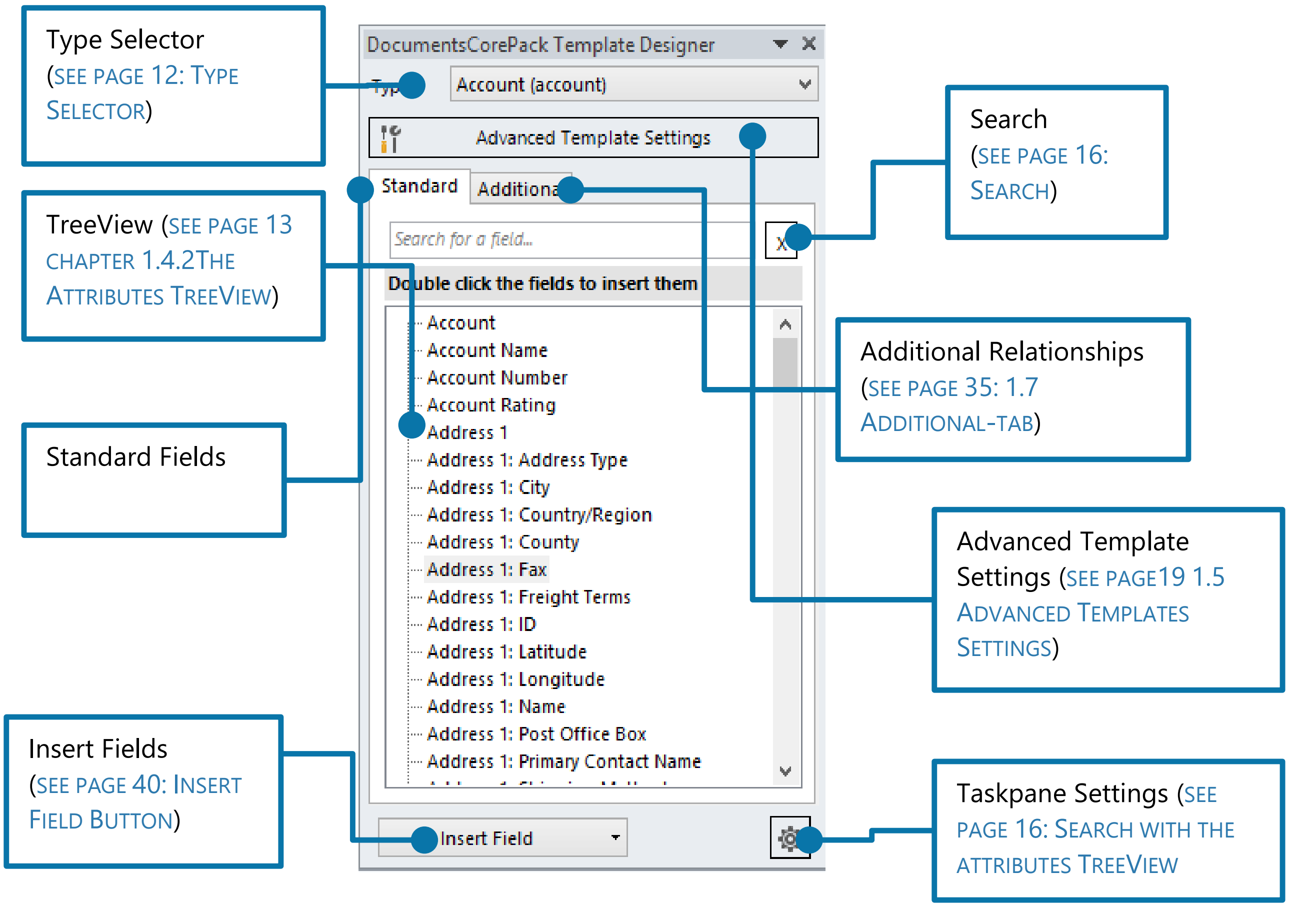


Figure 6: DocumentsCorePack Template Designer UI - Standard tab

1.4.1 Type Selector

The first step of creating a new template is always to select the entity the template should be based on. In the Type Selector-Drop Down Menu, every standard and custom entity is available. This selection is locked, as soon as a field is inserted or a property is set.

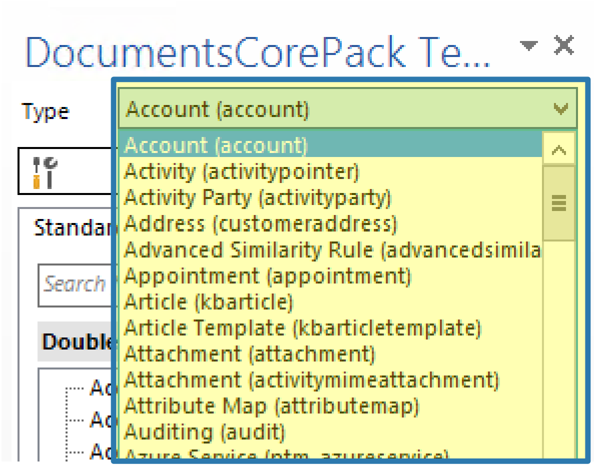


Figure 7: Type selector

1.4.2 The Attributes TreeView

The attributes TreeView displays all available attribute-fields of the entity that had been selected with the type selector previously. The fields are listed in a TreeView in the root section. Additionally, all related 1:N relationships form the CRM entity are display in the Standard Tab.

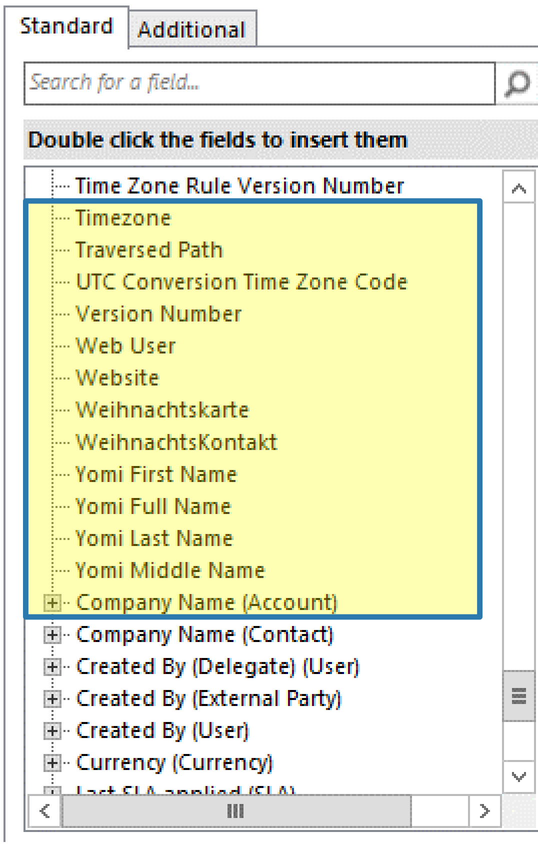


Figure 9: Standard fields

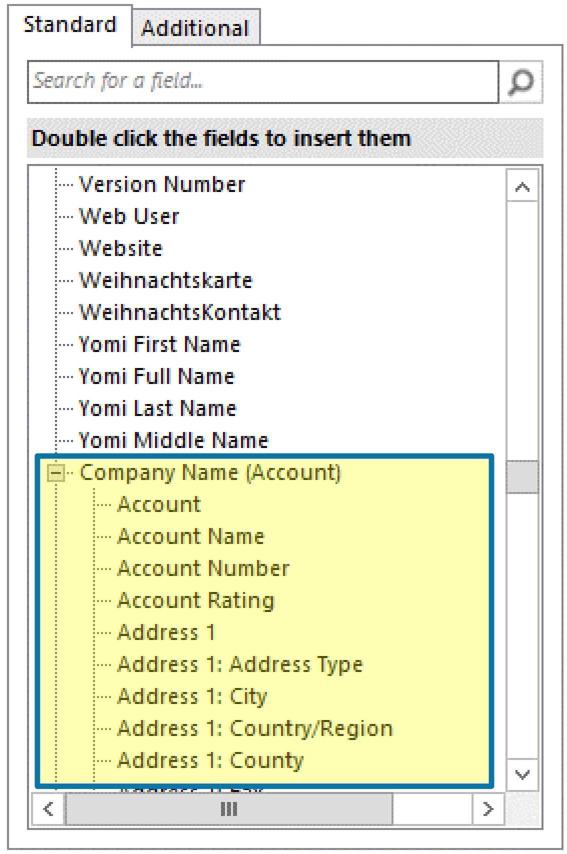


Figure 9: Standard fields of look up

The additional tab does not show the 1:N relationships automatically, as the relationship for the additional tab is defined separately.

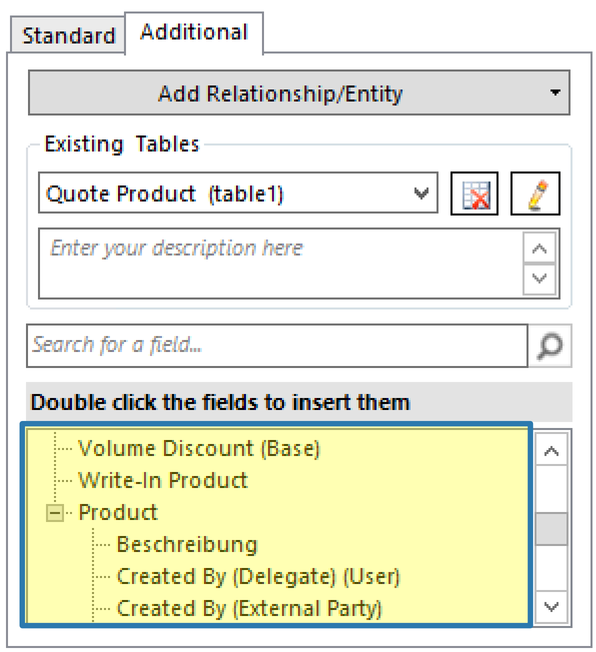


Figure 10: Treeview in the Additonal Tab

Hovering the mouse cursor over an element in the TreeView, will provide users with a tooltip, which includes additional information about the field. (SEE: PAGE 16, 1.4.4 SEARCH WITH THE ATTRIBUTES TREEVIEW)

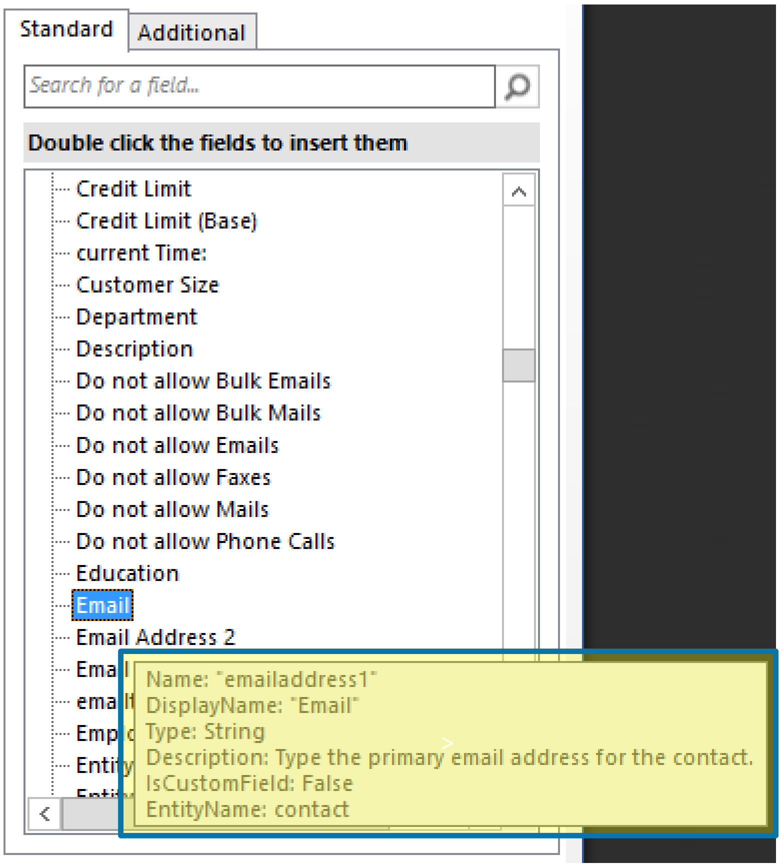


Figure 11: Tooltip of field

1.4.3 The Insert Fields button

This feature allows to insert additional contents in your .docx. The ***[Insert]*-**button provides you with various insert options. It is a simple and centralized way to insert every MSCRM-field as a "special" field. To get an overview of your options, you need to follow two easy steps:

1. Select a field in the tree view of the DocumentsCorePack Template Designer
2. Click on the Drop-Down-menu of the ***[Insert field]***-button at the bottom of the DocumentsCorePack Template Designer:

Figure 12: Insert fields buttons

Opening the drop-down menu (2) provides you with a lot of options that are going to be described in detail within the next chapters:

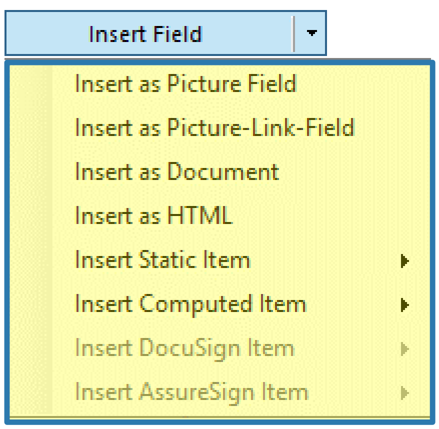


Figure 14: Insert Fields drop down

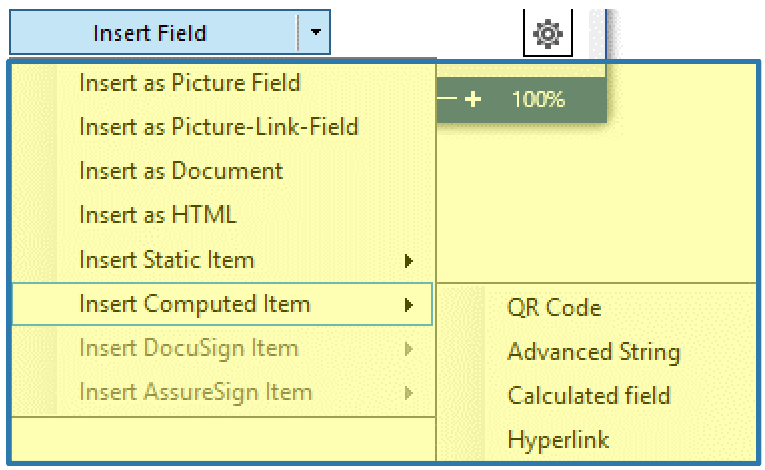


Figure 13: Insert fields drop down computed items

1.4.4 Search with the attributes TreeView

The search capability allows you to search the tree view for a specific field name. The search includes the display name, the schema name and the description depending on the configuration described in chapter 1.4.5.3 3 SEARCH options. The "*" is a supported wildcard character. As a default the search supports left truncation. Enter you search term in the textbox (left 1) and hit the magnifier button (left 2).

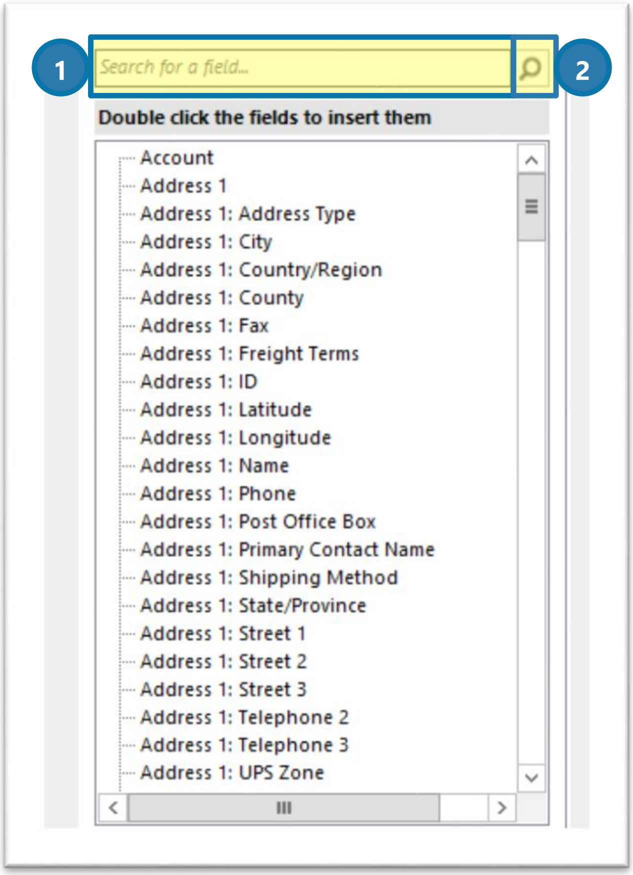


Figure 15: Attributes Treeview - Search

All fields that match the set search term (right 1) will be listed in a filtered view (right 3). To undo the search and see all available fields hit the ***[x]*** button (right 2).

Additional options related to the search can be set in the Taskpane Settings.
(SEE: PAGE 17, 1.4.5, TASKPANE SETTINGS)

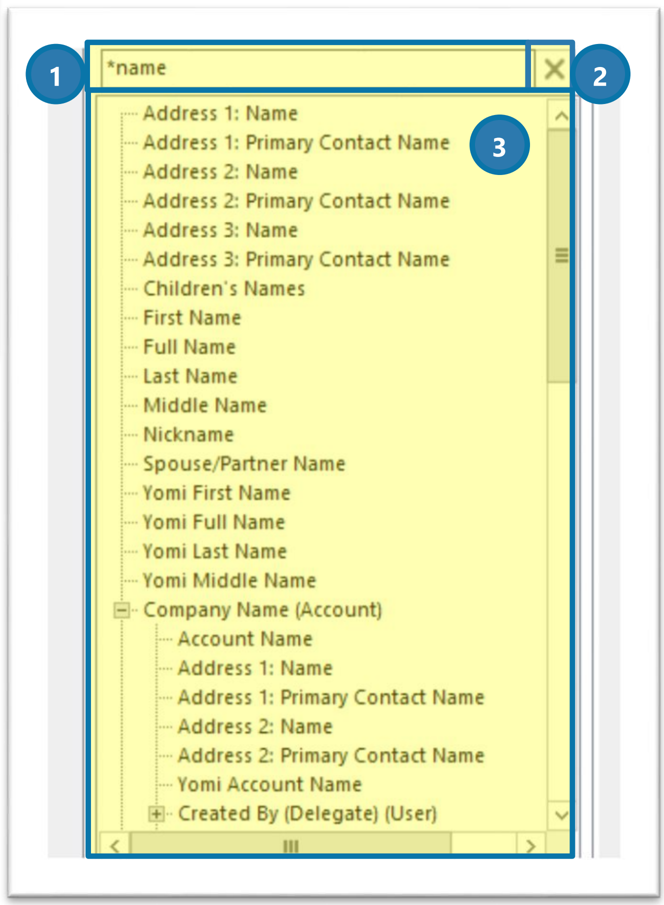


Figure 16: Treeview - Search result

1.4.5 Taskpane settings

The Taskpane settings allow you to the modify some of the behaviors of the TreeView containing the CRM attributes.

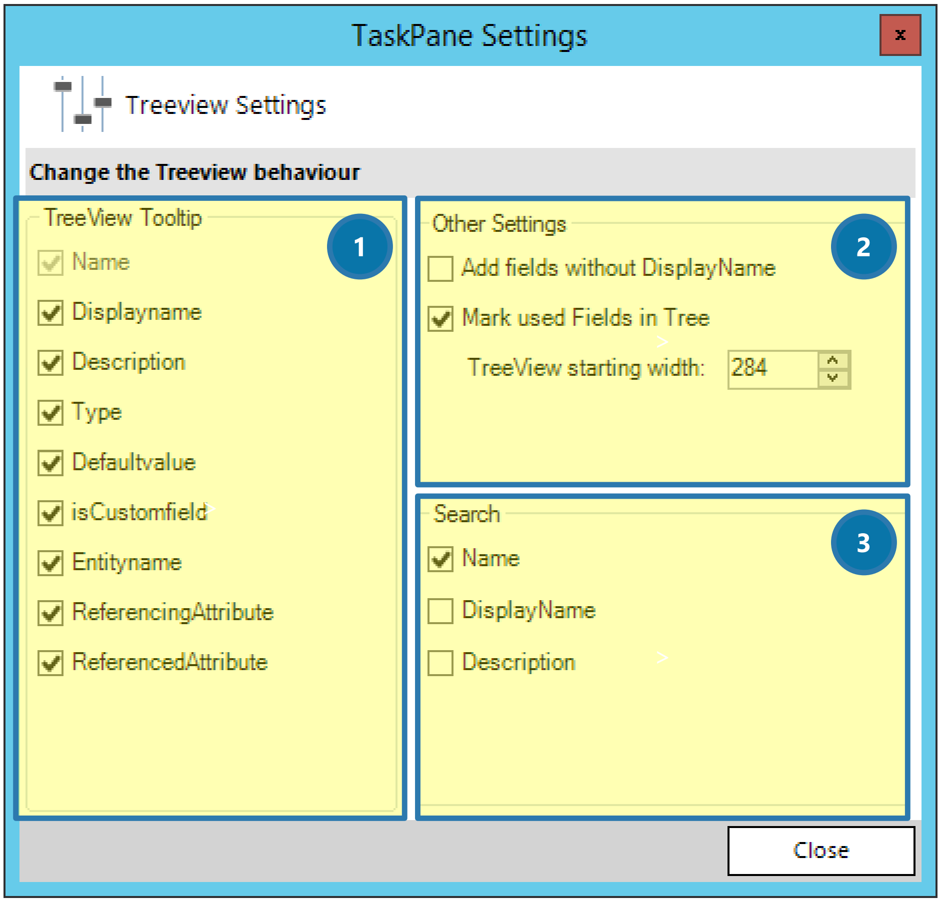


Figure 17: Taskpane settings

1.4.5.1 1 Tooltip options

A list of available additional information allows you to select the information about the field that you would like to see in the tooltip of the field.

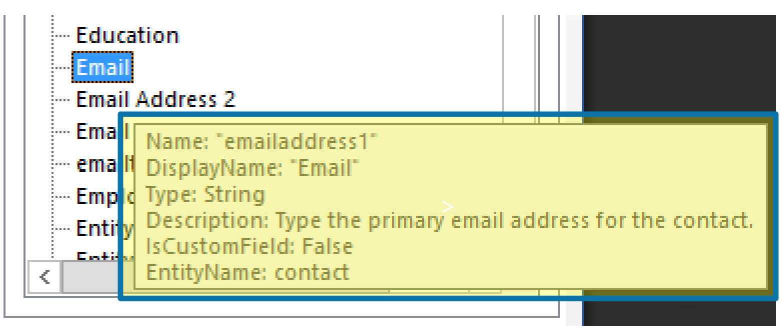


Figure 18: Tooltip of field in the attributes tree view

1.4.5.2 ❷ Other settings

"Add fields without Displayname": Certain fields in CRM are not intended to be used on CRM forms and therefore do not have a Dsiplayname. Nevertheless, you might have the requirement to use those fields in your template. With this option to you can enable these fields. The schema name of will be used and the name begins with "*" (asterisk).

"Mark used fields in Tree": If a field is already used in the document it will be bold.

"Treeview starting width": Allows to set the width in pixels when the task pane is opened in Word

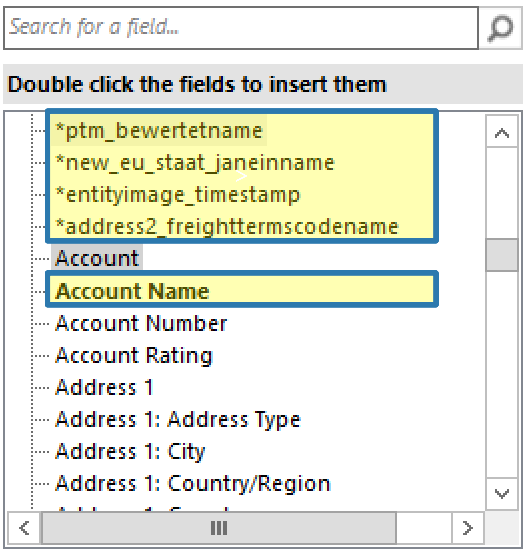


Figure 19: Fields without Displayname (top) and used fields (bottom)

1.4.5.3 ❸ Search options

The available list of fields (Name, Displayname, Description) allows you to define with information of the CRM field should be included for the search.
The Name is the schema name in CRM which is usually an internal identifier (e.g. emailaddress1).
The DisplayName is the label which is also used on a CRM form (e.g. Primary Email)
The description is the text-block that contains additional information about the field. (e.g. the purpose or usage of the field)

1.5 Advanced Templates Settings

Clicking the ***[Advanced Template Settings]***-button will open a new window.

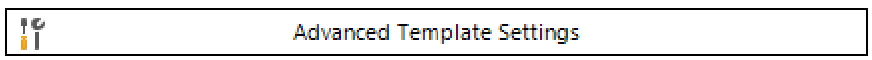


Figure 20: Advanced Template Settings button

The Advanced Template settings are divided in 3 major categories:

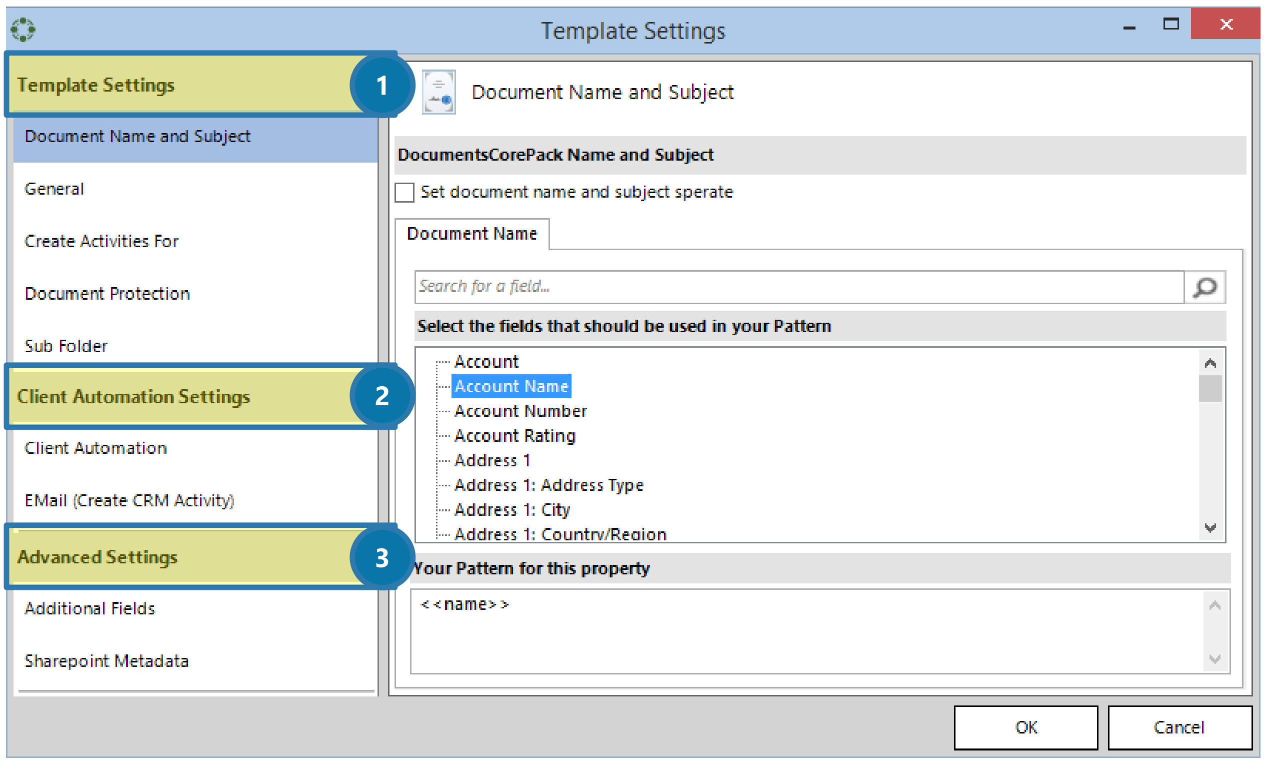


Figure 21: Templates settings categories

❶ Template Settings
These settings describe the Documents behavior during the document generation
This section contains the possibility to define
❷ Client Automation Settings
These settings are only for the DocumentsCorePack Client which is described here.
❸ Advanced Settings
Includes several additional features for specialized template behavior

1.5.1 Document Name and Subject

The "Document name" property allows you to define a name, or a name pattern for your template, ensuring that the future document has a pretty name the moment it is generated.

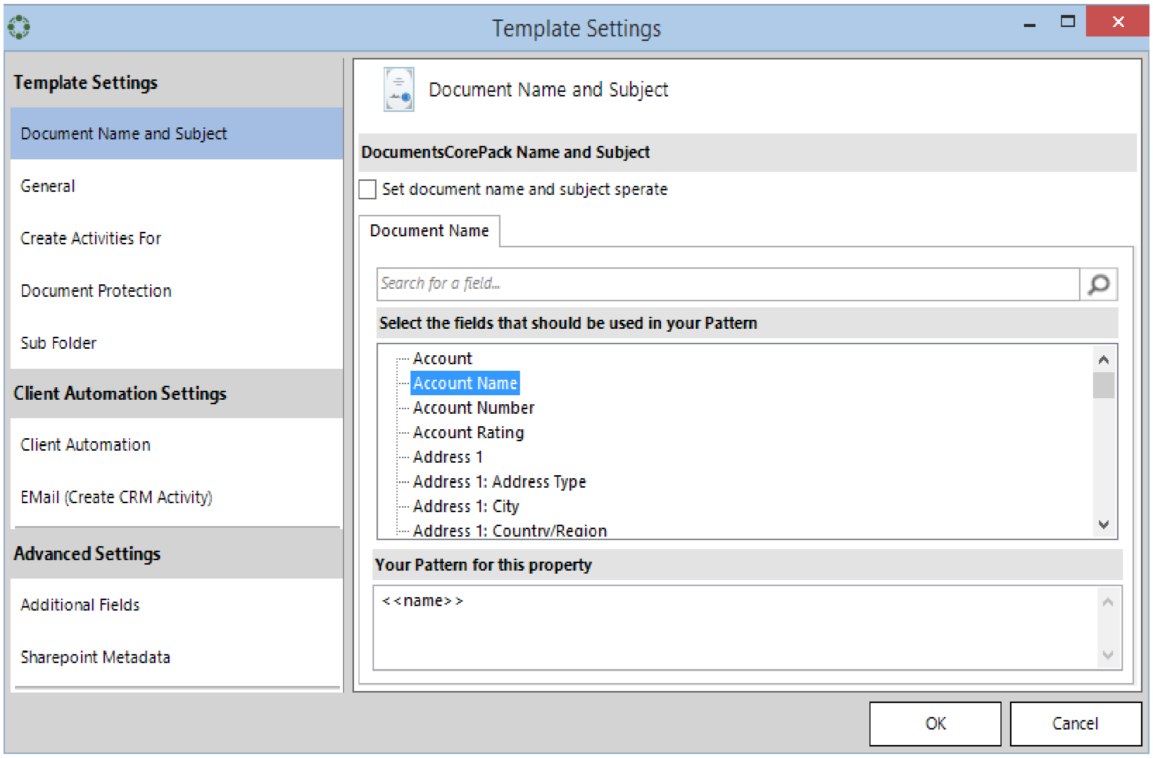


Figure 22: Document Name and Subject

The allowed syntax for this property and the available options for this field are described here (SEE: PAGE 58, 3.1.1 STRINGS (BASIC SYNTAX) F.) This is how such a document could look like:

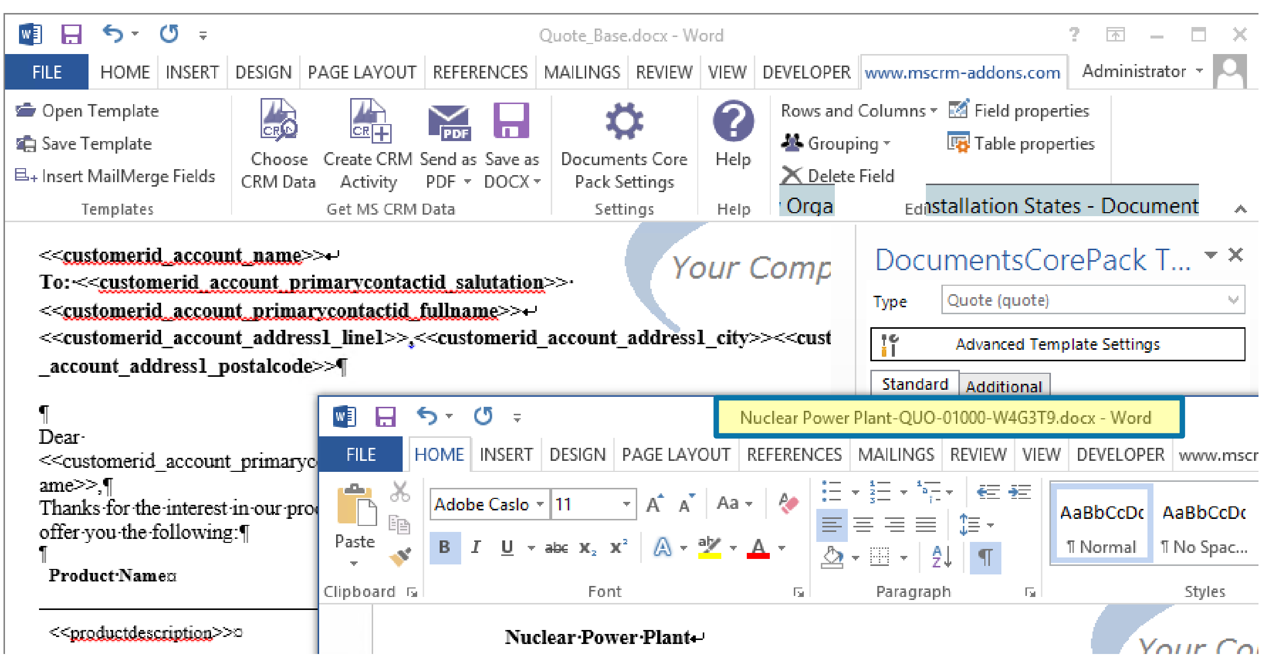


Figure 23: Example of the DocumentName after a merge

1.5.2 General

The "General" property provides you with some general settings options for your future template.

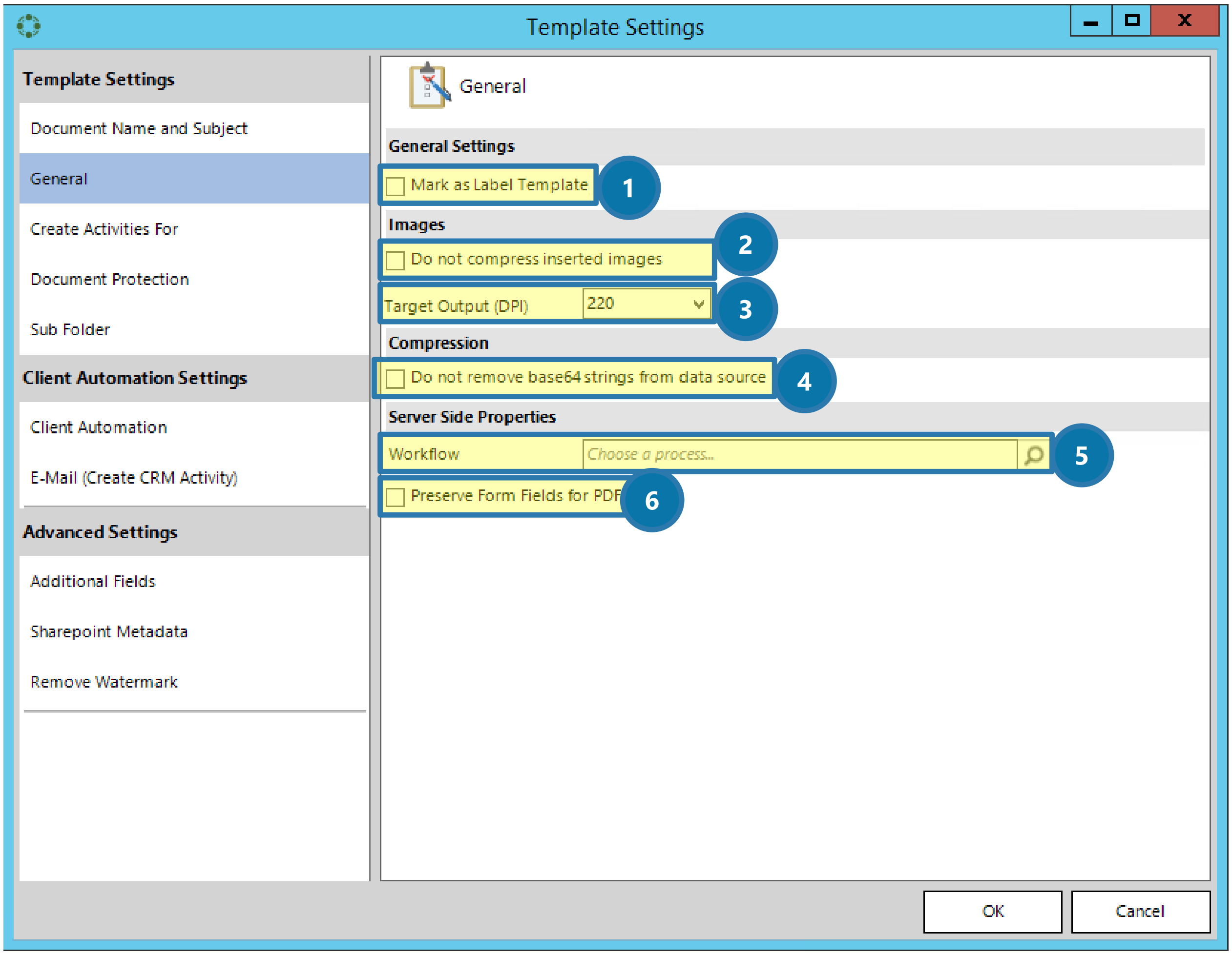


Figure 24: Template Settings - General

❶ Mark as Label Template

Mark your future template as "Label Template" (which has a special behavior)

❷ Do not compress inserted images

Change your image settings, for example: do not compress inserted images

❸ Target Output (DPI)

Change your image settings, for example: set your target DPI output

❹ Do not remove base 64 strings from data source

Modify the compression of your future template

❺ Workflow

Set a workflow in order to make sure that the template will be processed in a certain way automatically after its creation.

❻ Preserve Form Fields for PDFs

Check the checkbox to preserve form fields for PDFs. Form fields in PDFs are fields that can be customized (filled) by users.

1.5.3 Create Activities for

The "Create Activities For" property is used to predefine settings for DocumentsCorePack Client based operations that effect templates. The configuration options allow template editors to define the "Recipient", "Regarding" and the "Save Location" of activities based on a template independently.
For further information on DocumentsCorePack Client, [please have a look at the documentation]() of the same name.

Anyway, to set a "Recipient", a "Regarding" or a "Save Location", simply click on the desired entity/location in the TreeView.

Per default, only the "Recipient" – tab is displayed.
If you want all three tabs to be shown, you have to check the "Enable Advanced Settings"- checkbox.

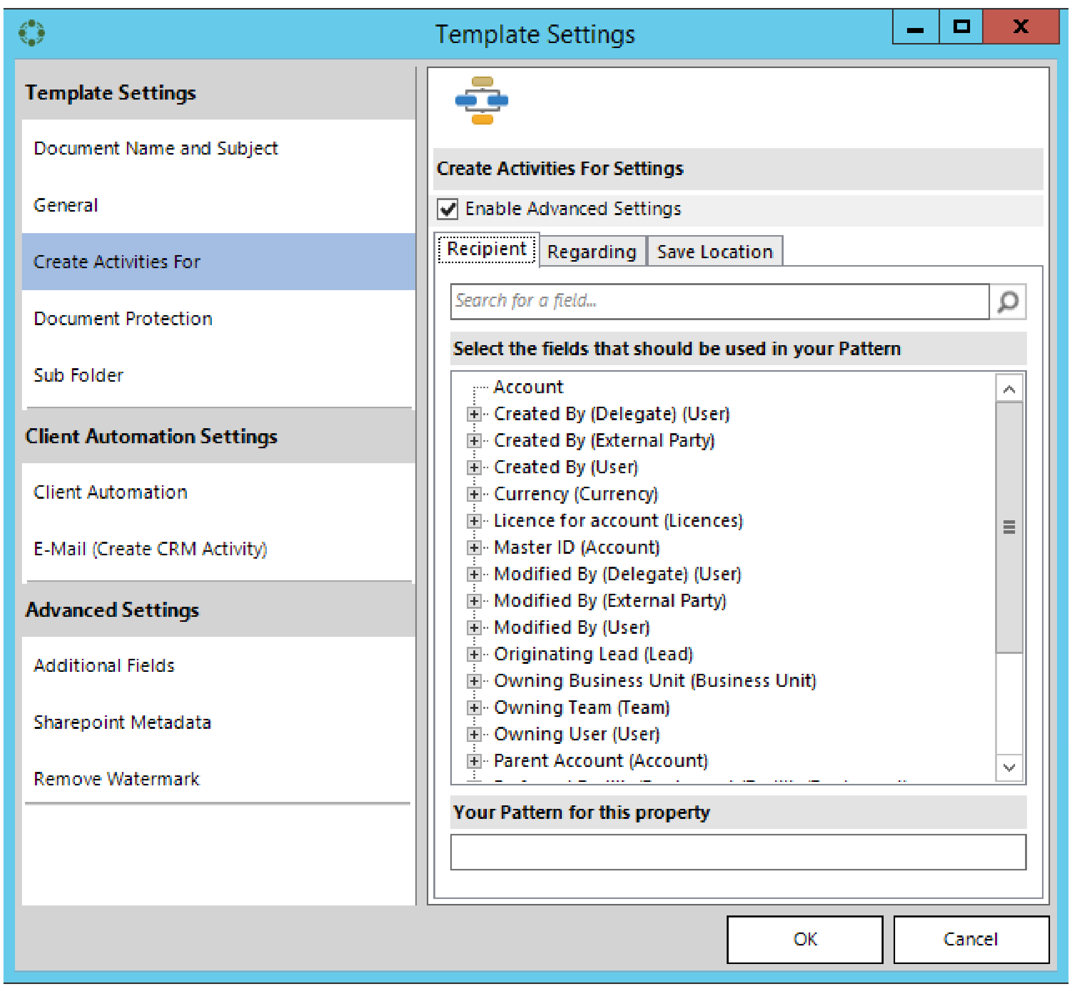


Figure 25: Template Settings – Create Activities For

1.5.4 Document Protection

The "Document Protection" property provides you with the possibility to add a password to your future MS Word document. A practical TreeView supports you with the selection process.

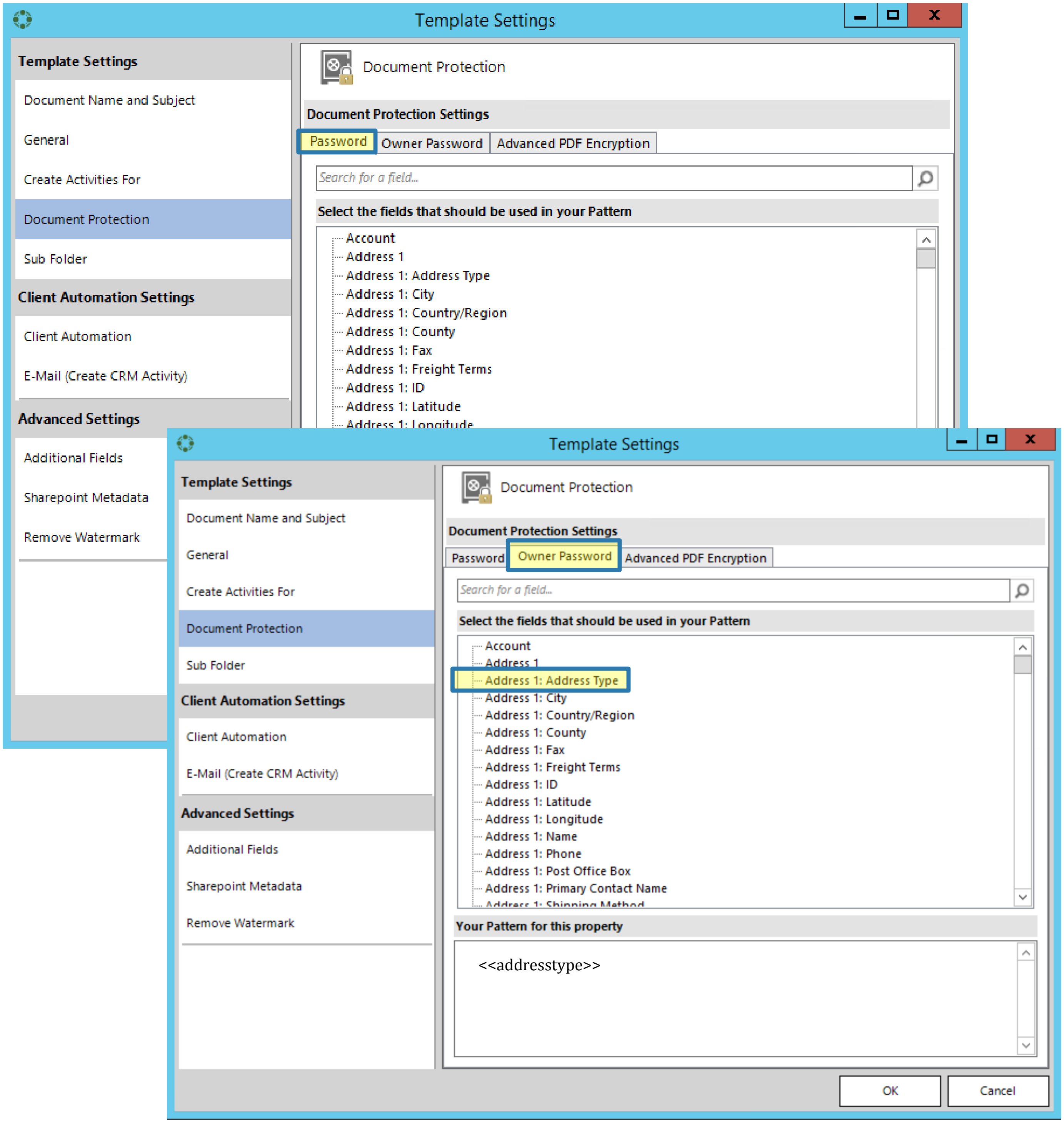


Figure 26: Template Settings – Document Protection: (Owner) Password

For the DocumentsCorePack Server based document generation, you can also set a password for PDFs and thus, enhance the security of the document.

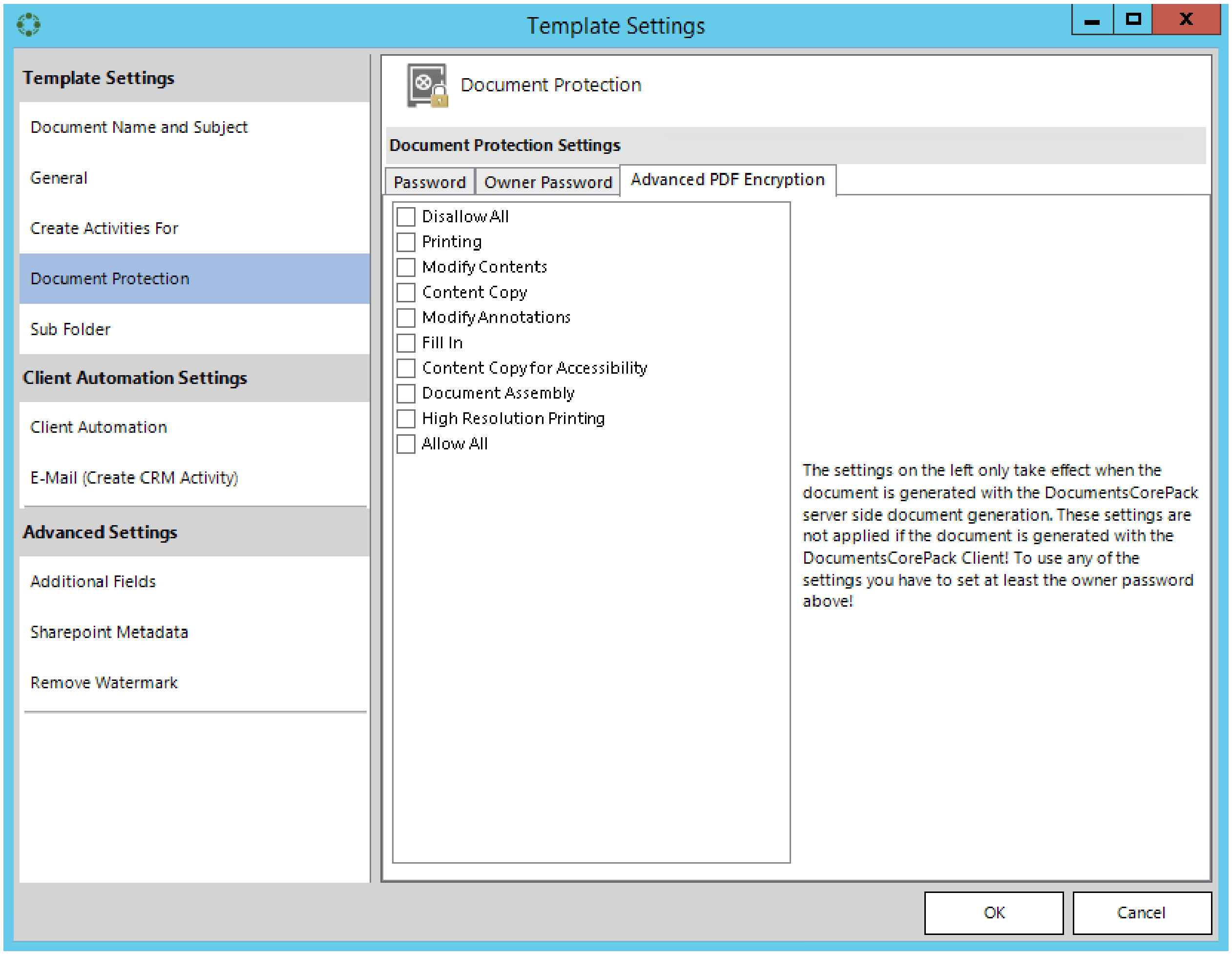


Figure 27: Template Settings – Document Protection: Advanced PDF Encryption

1.5.5 Sub Folder

The sub folder property can be used to define a certain subfolder if the integrated CRM SharePoint storage option is enabled for DocumentsCorePack.

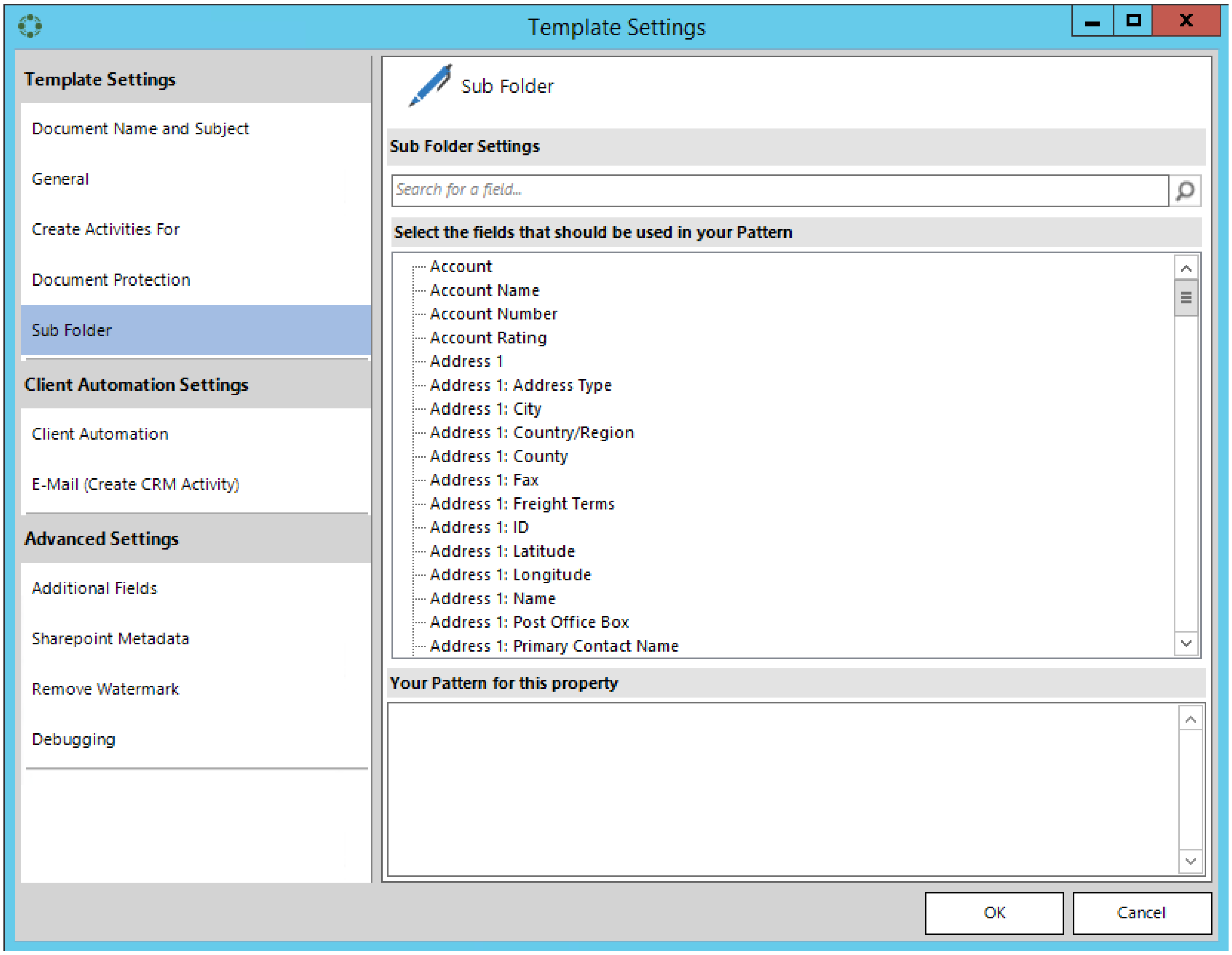


Figure 28: Template Settings – Sub Folder

The Sub Folder also can be created dynamically and based on CRM fields by following the DocumentsCorePack Syntax. (SEE: PAGE 58, 3.1.1 STRINGS (BASIC SYNTAX) F.)

The Subfolder will be created on top of the CRM Integrated SharePoint location. This guide also contains a section for external sources. (SEE: PAGE 121, 7.3 CRM SHAREPOINT INTEGRATION);

1.5.6 Client Automation

The "Client Automation" property settings work only with DocumentsCorePack Client based operations. Furthermore, they only take affect when the ***[Create CRM Activity]*** - button of the Client is used and **do not work** with the ***[Send as ....]*** - option.

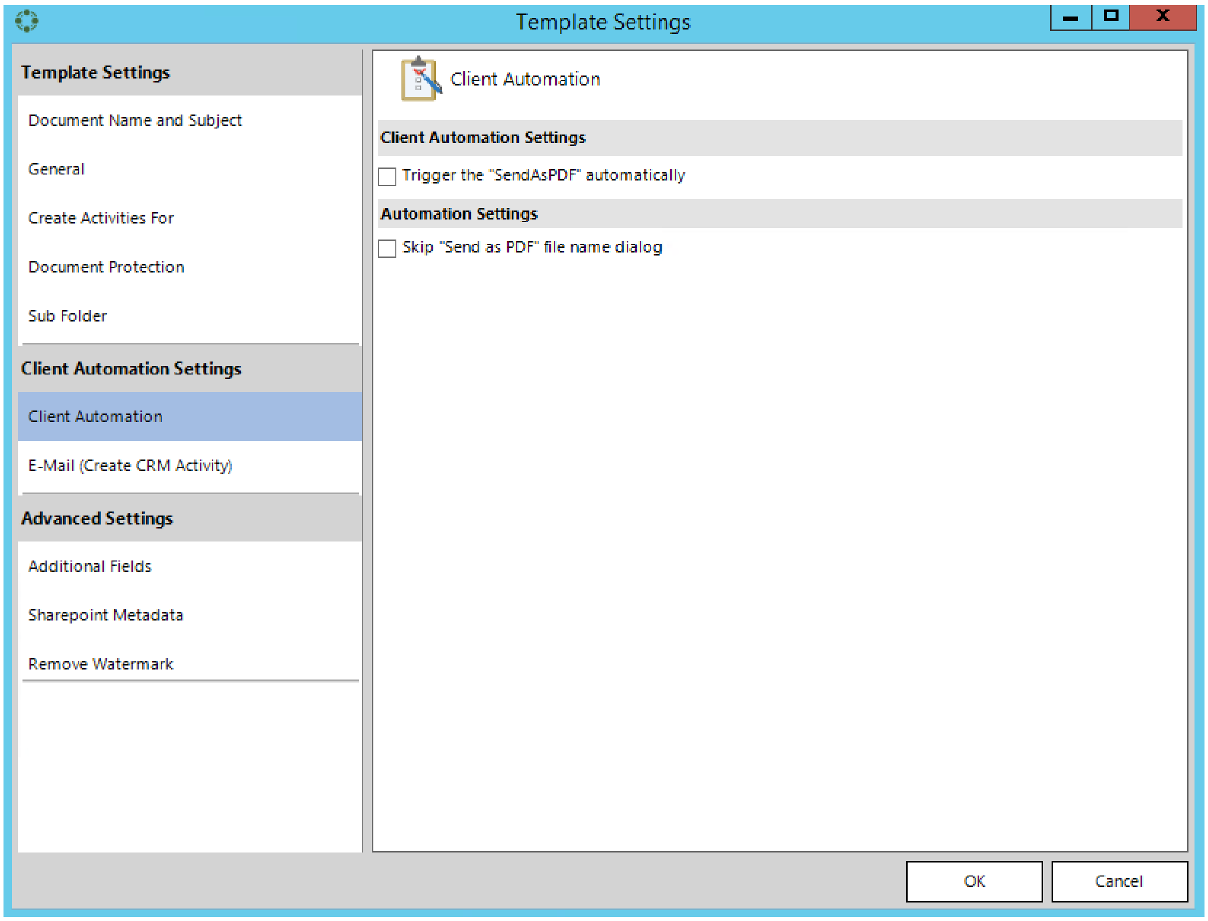


Figure 29: Client Automation Settings – Client Automation

Figure 30: Client Automation Settings – Trigger the [SendasPDF] – button automatically

If this checkbox is checked, PDFs are sent automatically. If you do not want to press the ***[SendasPDF]*** – button manually, this is the perfect feature for you.

Figure 31: Automation Settings – Skip "Send as PDF" file name dialog

Check this checkbox to automatically skip the "file name"-dialog. Usually, you have to enter a file name if you press the [SendasPDF]-button. This is not necessary anymore if you check this checkbox.

1.5.7 E-Mail (Create CRM Activity)

The “E-Mail (Create CRM Activity)” property enables users to define the “Recipient” (TO), “Carbon Copy” (CC) and “Blind Carbon Copy” (BCC) – addresses of an e-Mail. It is possible to use data from fields out of CRM to be part of the entries. The predefined email addresses will show up in every email activity. “to”, “cc” and “bcc” settings of your future Emails are possible in this section.

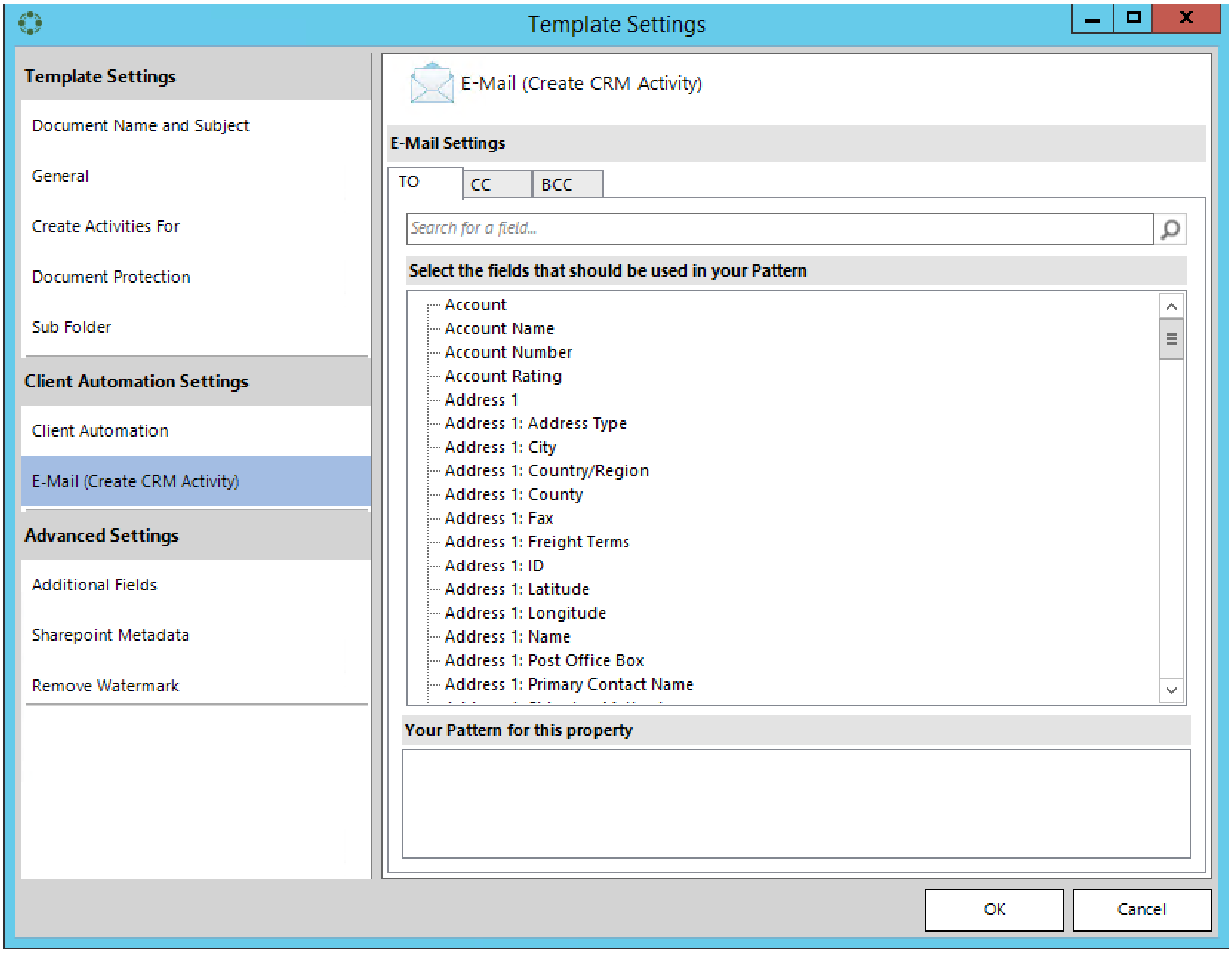


Figure 32: Automation Settings – E-Mail (Create CRM Activity)

1.5.8 Additional fields (obsolete)

This area contains fields that are not directly inserted into the template. You do not have to worry about the settings as all out of the box functionality populates the necessary fields her automatically. (This is not further described in a separate article)

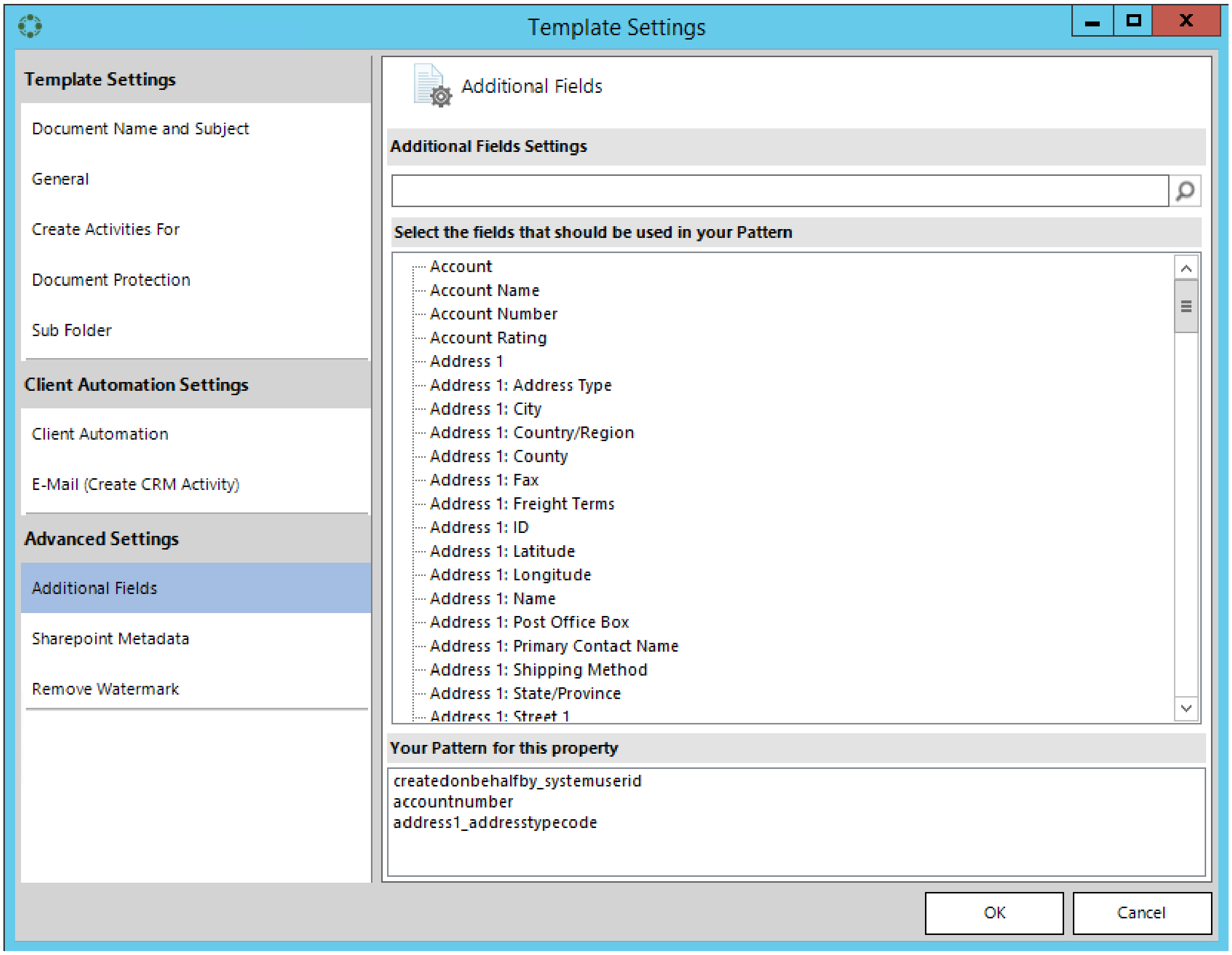


Figure 33: Advanced Settings – Additional fields with example

1.5.9 SharePoint Metadata

Using the standard CRM SharePoint Integration enables you to define metadata fields and values in your template automatically. As soon as the generated document is saved also this metadata is updated in SharePoint. Details about the Standard CRM SharePoint Integration can be found here at PAGE 121, 7.3 CRM SHAREPOINT INTEGRATION.

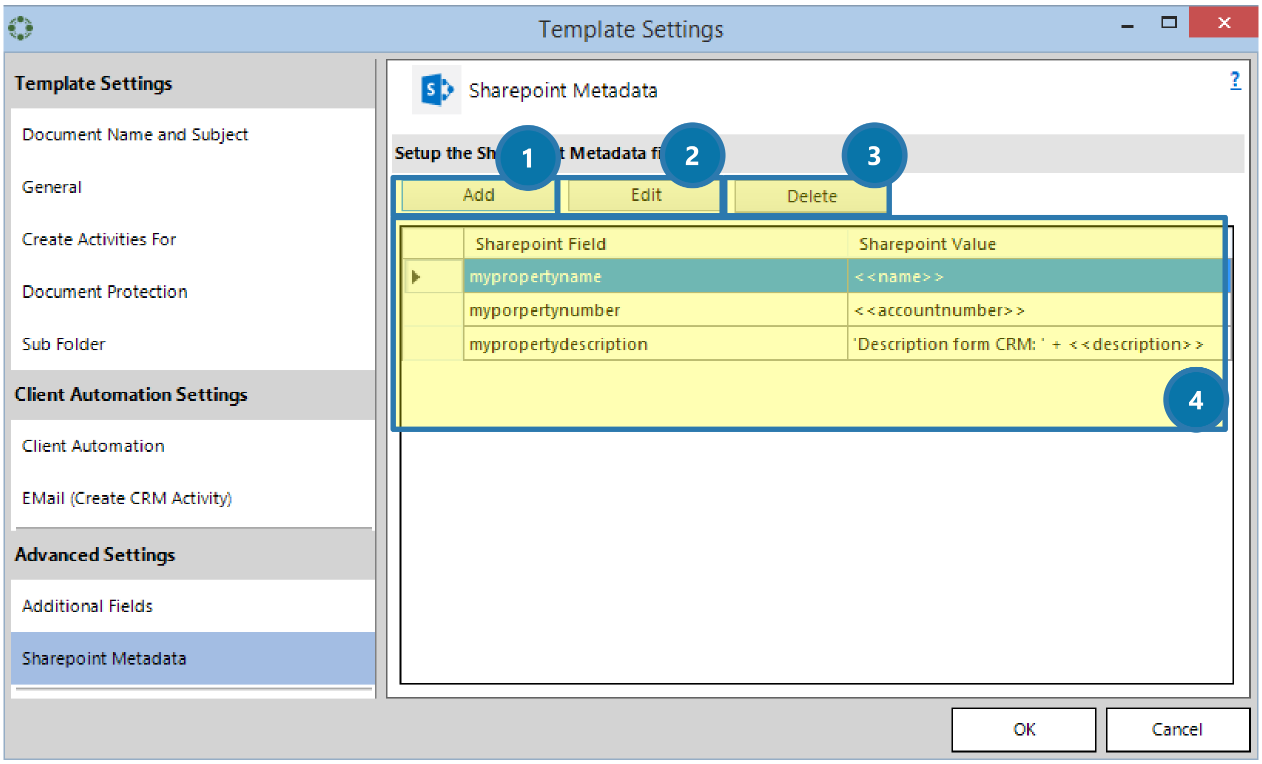


Figure 34: Sharepoint Metadata Dialog

The properties are presented in a list view (4) showing the name of the property and the value set for this property. Within this dialog you are able to add, edit and delete properties.

SharePoint taxonomy properties are not supported.

1.5.9.1 ❶ Add

When you add a new property, a dialog appears. In this dialog you have to set the actual name of the SharePoint metadata property. To find this name, simply search for the term in the Search-field and click on the ***[magnifier]***-button. The TreeView will provide you with all fields that a) contain your search term and b) are related to the main entity (in this example: "Account").
The name can be set up following the syntax of DocumentsCorePack for strings. (SEE: PAGE 58, 3.1.1 STRINGS (BASIC SYNTAX) F.)

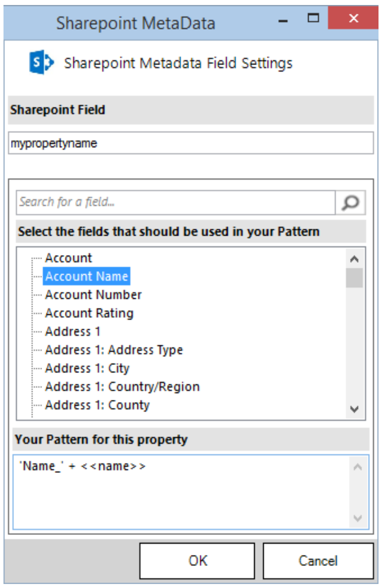


Figure 35: SharePoint Metadata Property

1.5.9.2 ❷ Edit

By using the edit button on any existing property the same name can be set up following the syntax of DocumentsCorePack for strings. (SEE: PAGE 58, 3.1.1 STRINGS (BASIC SYNTAX) F.)

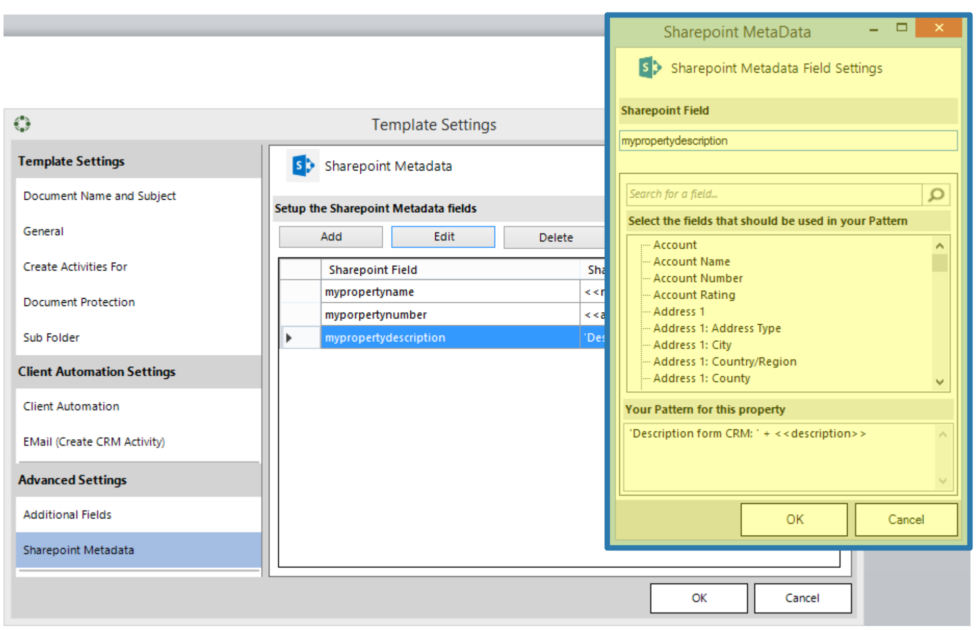


Figure 36: SharePoint Metadata Property - Edit

1.5.9.3 ③ Delete

Delete removes an existing property form the list.

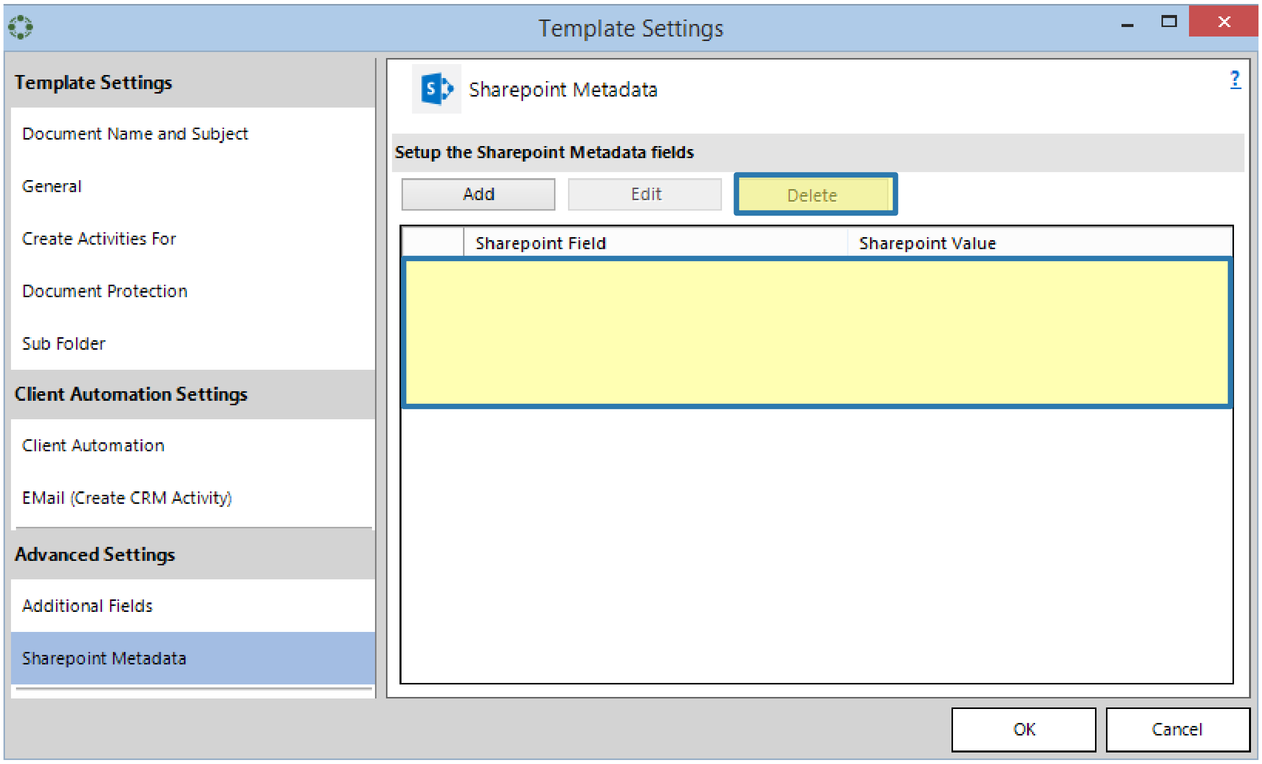


Figure 37: SharePoint Metadata Property - Delete

Using the standard CRM SharePoint Integration enables you to define metadata fields and values in your template automatically. As soon as the generated document is saved, also this metadata is updated in Microsoft Dynamics CRM.

1.5.9.4 ④ Create a new property

To create a new property, simply click on ***[Add].*** The Sharepoint MetaData window pops up. You have to type in the name of the SharePoint property manually into the *SharePoint Field* ①. Select the fields that should be used in your pattern here (2). The value for the property can be composed from Microsoft Dynamics CRM fields and fixed text.

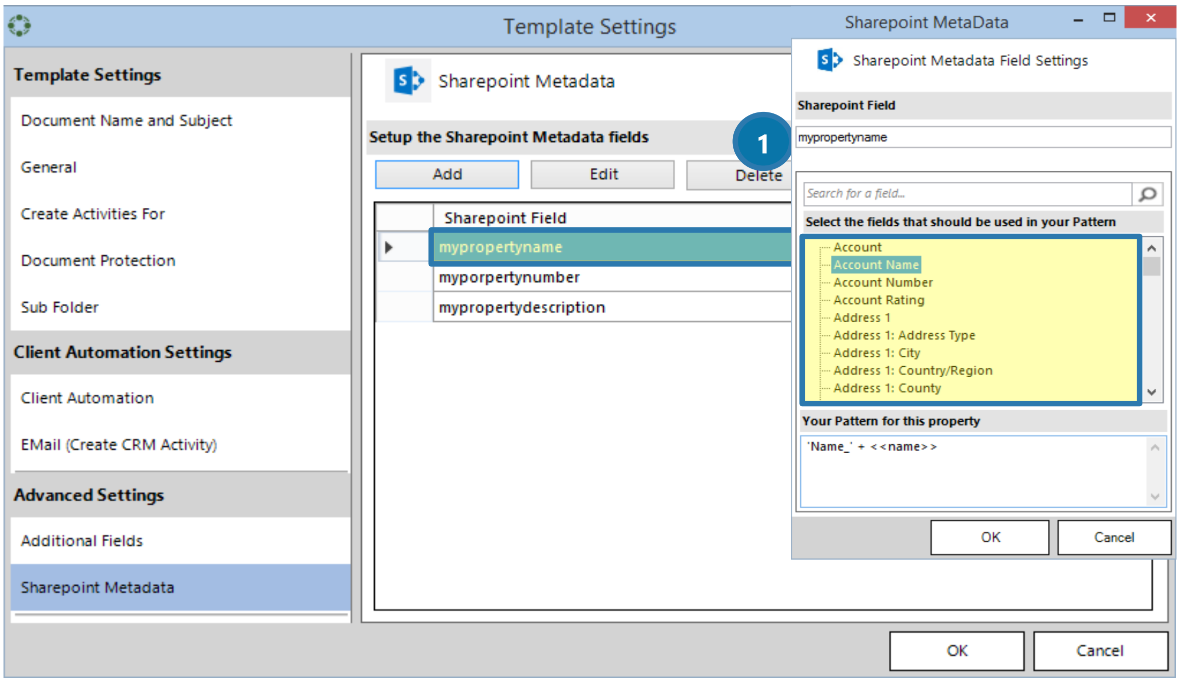


Figure 38: SharePoint Metadata Property – Create new property

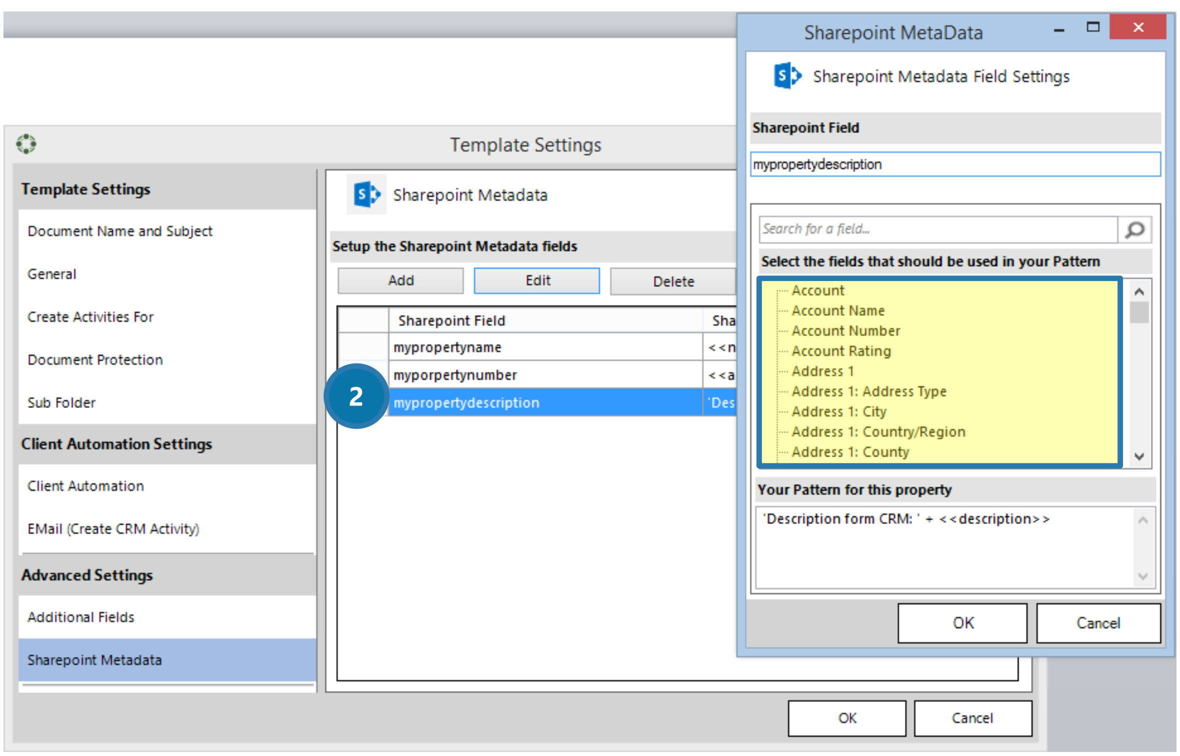


Figure 39: SharePoint Metadata Property – Select fields for newly created property

1.5.10 Remove Watermark

Define a condition that removes the Inserted Watermark if the Condition is met. You have to insert a Watermark in your template first, otherwise this property does not have any effect.
How to insert a watermark is described here at PAGE 119, 7.1 HOW TO INSERT A WATERMARK.

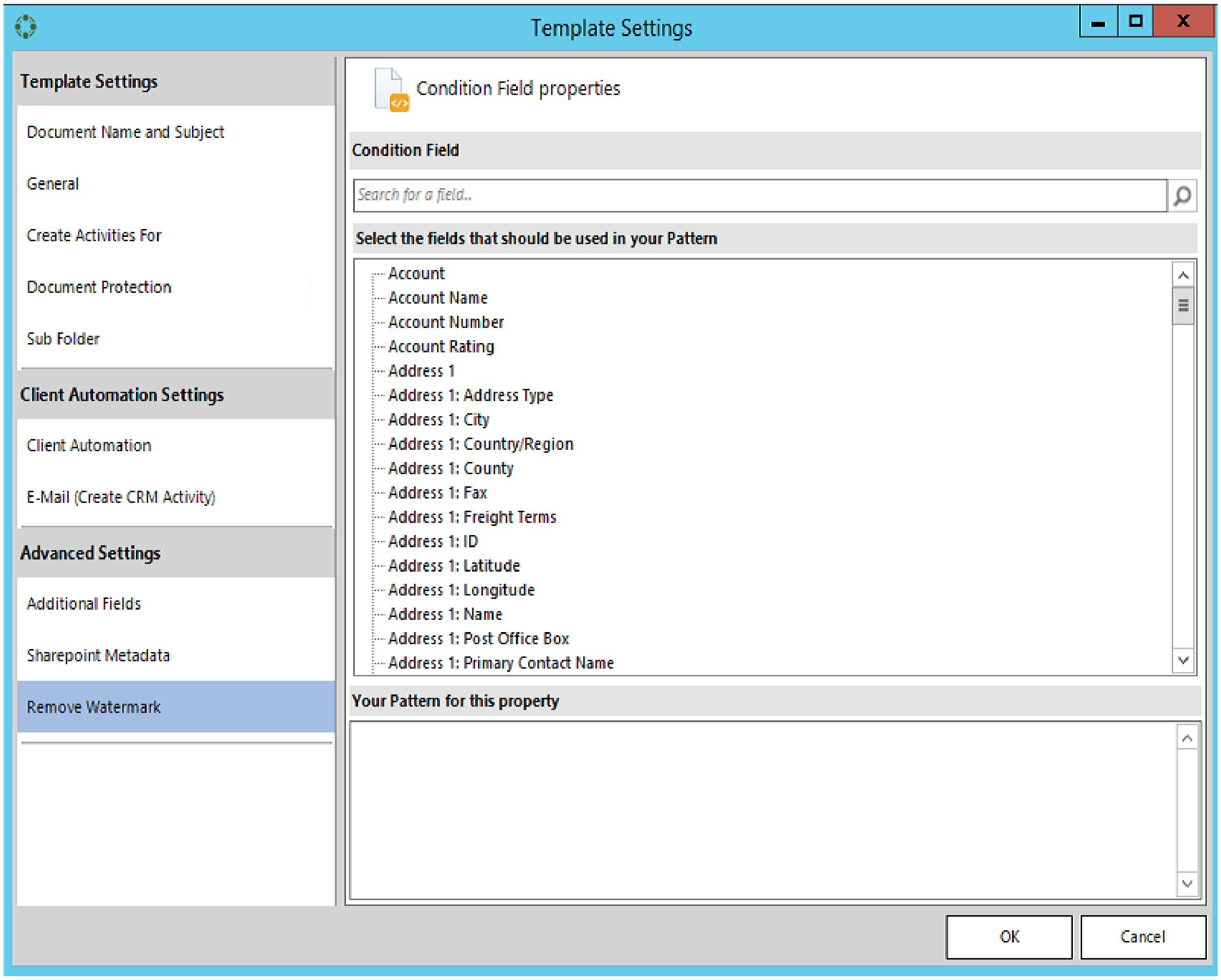


Figure 40: Remove Watermark

The condition that can be defined follows the DocumentsCorePack syntax for conditions. (SEE PAGE 62, 3.1.4 CONDITIONS)

1.6 Notification Area

The notification area provides you with import information about DocumentsCorePack. You will see this message most likely if the metadata of CRM is out of date.

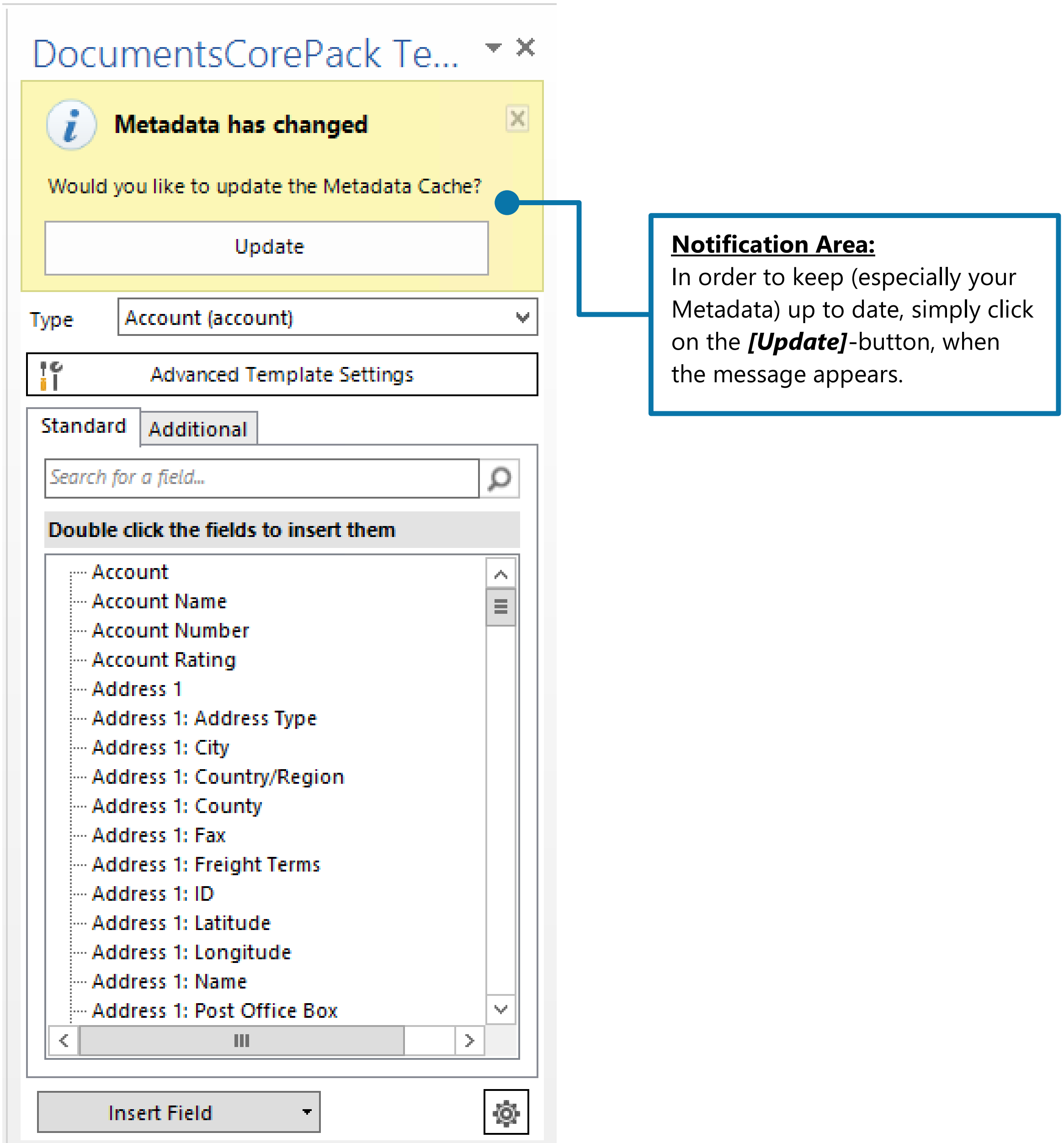


Figure 41: Notification Area – Metadata update

1.7 Additional-tab

This window has been designed to manage and insert additional fields.

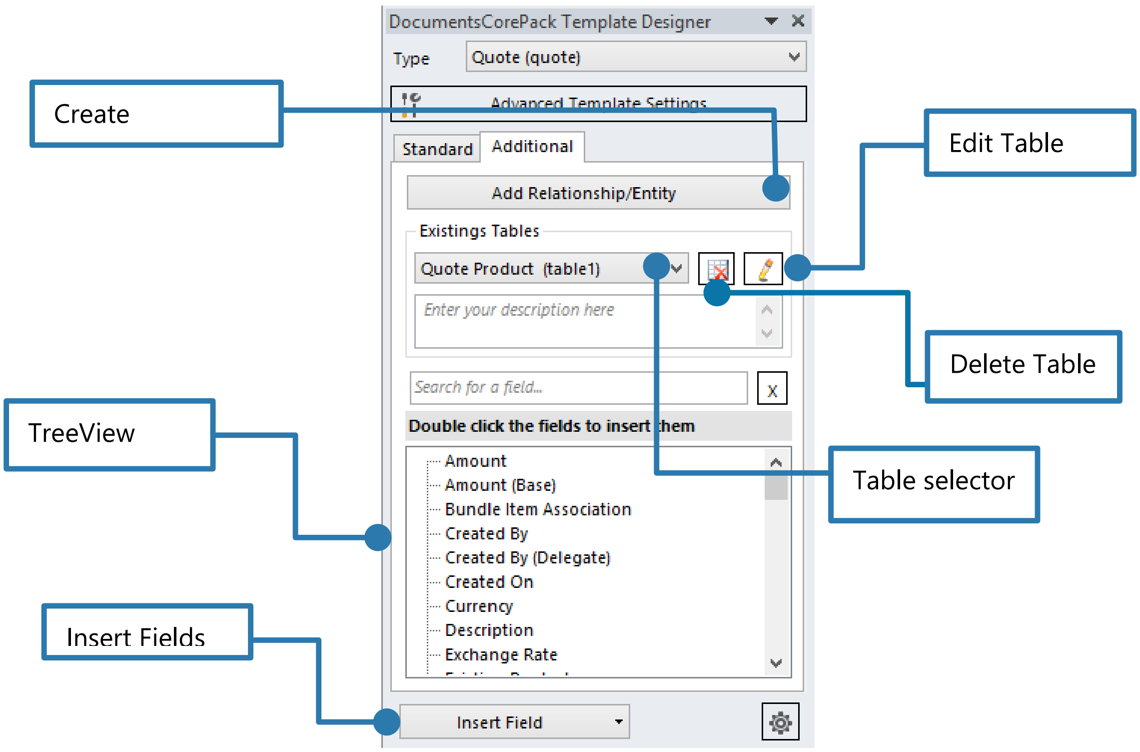


Figure 42: DocumentsCorePack Template Designer UI - Additional tab

1.7.1 Add Relationships/Entity

A click on the button ***[Add Relationship/Entity]*** (1) will open the relationship designer to create a new relationship from scratch. While a click on the ***[Dropdown Arrow]*** (2) expands an extended menu with predefined relationships.

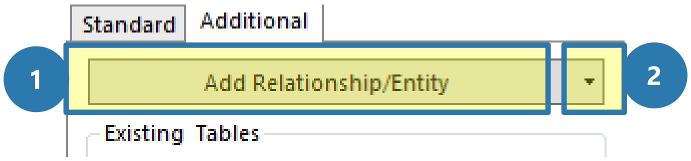
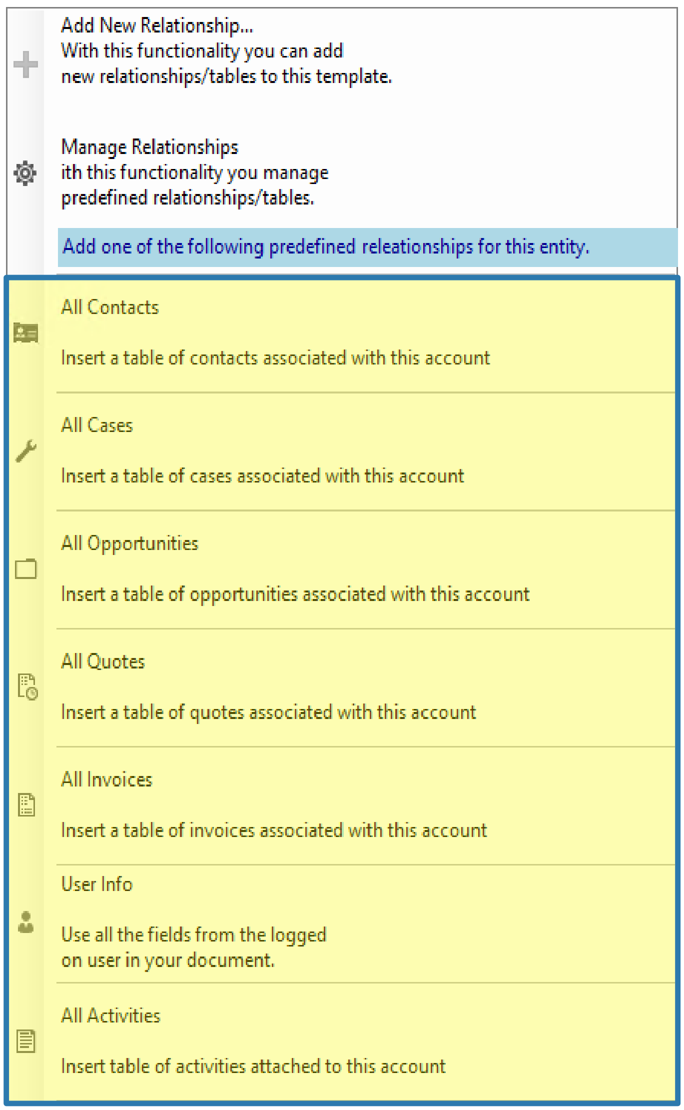


Figure 43: Add Relationship/Entity button

Clicking on the Dropdown Menu of the ***[Add Relationship/Entity]***-tab opens this dialog:



The marked area includes all predefined relationships. DocumentsCorePack already has a variety of different predefined relationships for standard CRM entities.
e.g. All Contacts of an Account, Quote Products of a Quote, …

In our example, we decided to select ***[All contacts]*** to get access to the fields from the entity "Contact by clicking on it."
Now the Additional tab TreeView is filled with the predefined relationship [All Contact] and you can easily insert them into your template.

Figure 44: Add Relationship/Entity dropdown - predefined relationships

1.7.2 Table selector

The table selector is a drop down menu that contains all added relationships for the current template. By switching the selection, the corresponding fields in the below TreeView change.

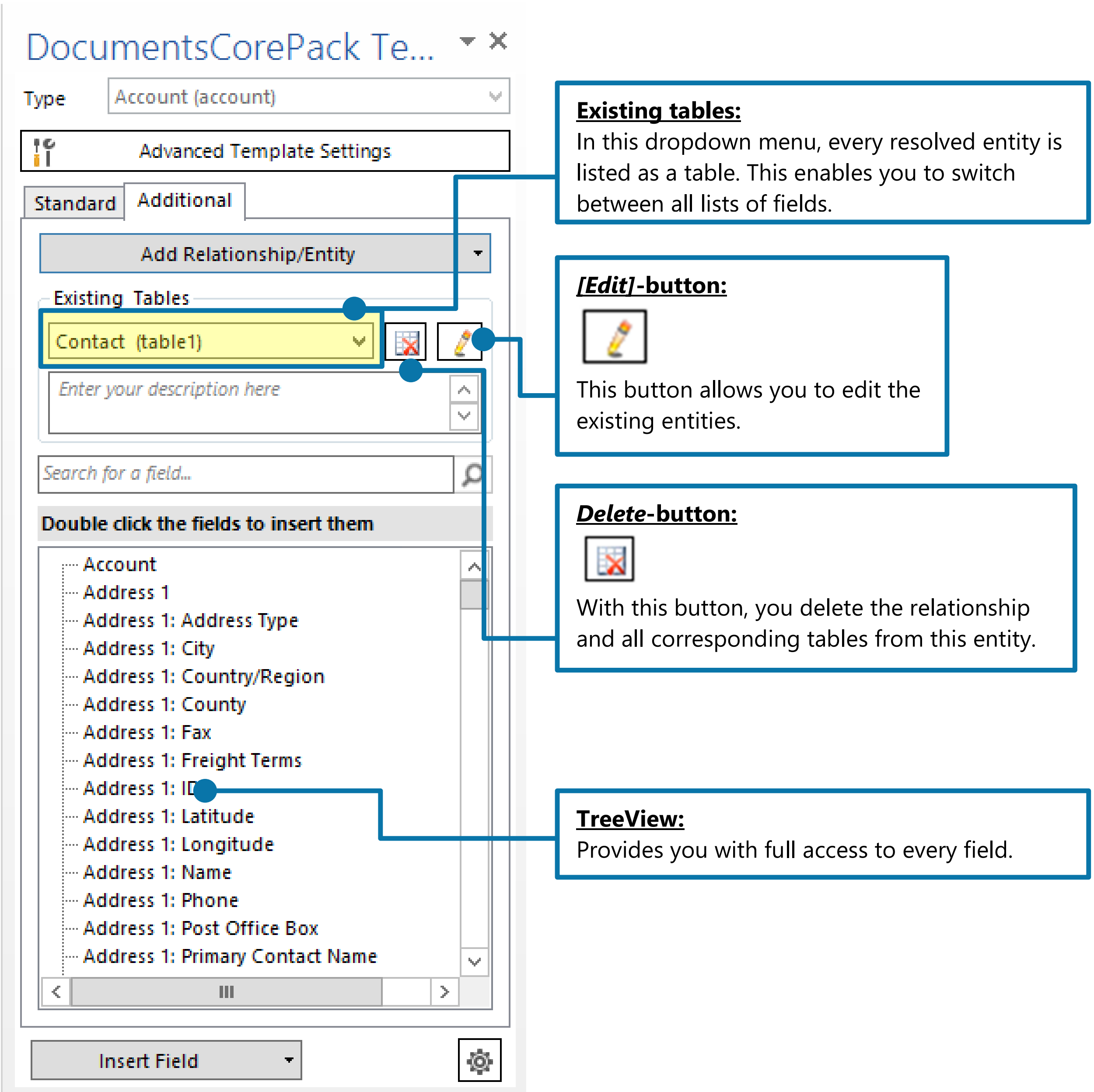


Figure 45: Table Selector

1.8 Additional Relationships

The ***[Add Relationship/Entity]***-button also includes buttons that allow its users to add a new relationship or to manage existing relationships and tables. For further information on how to manage tables, please have a look at CHAPTER 2.1 MANAGE TABLES, PAGE 54.

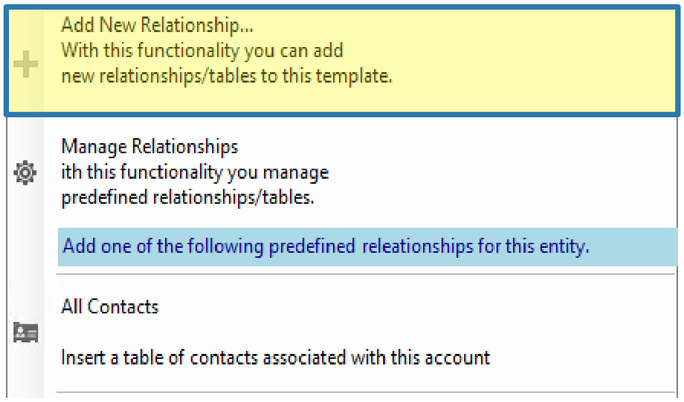


Figure 46: Add New Relationship...

Clicking the ***[Add New Relationship...]***-button opens the dialog shown below. Within it, you can configure fields, tables and relationships that are important for your document.

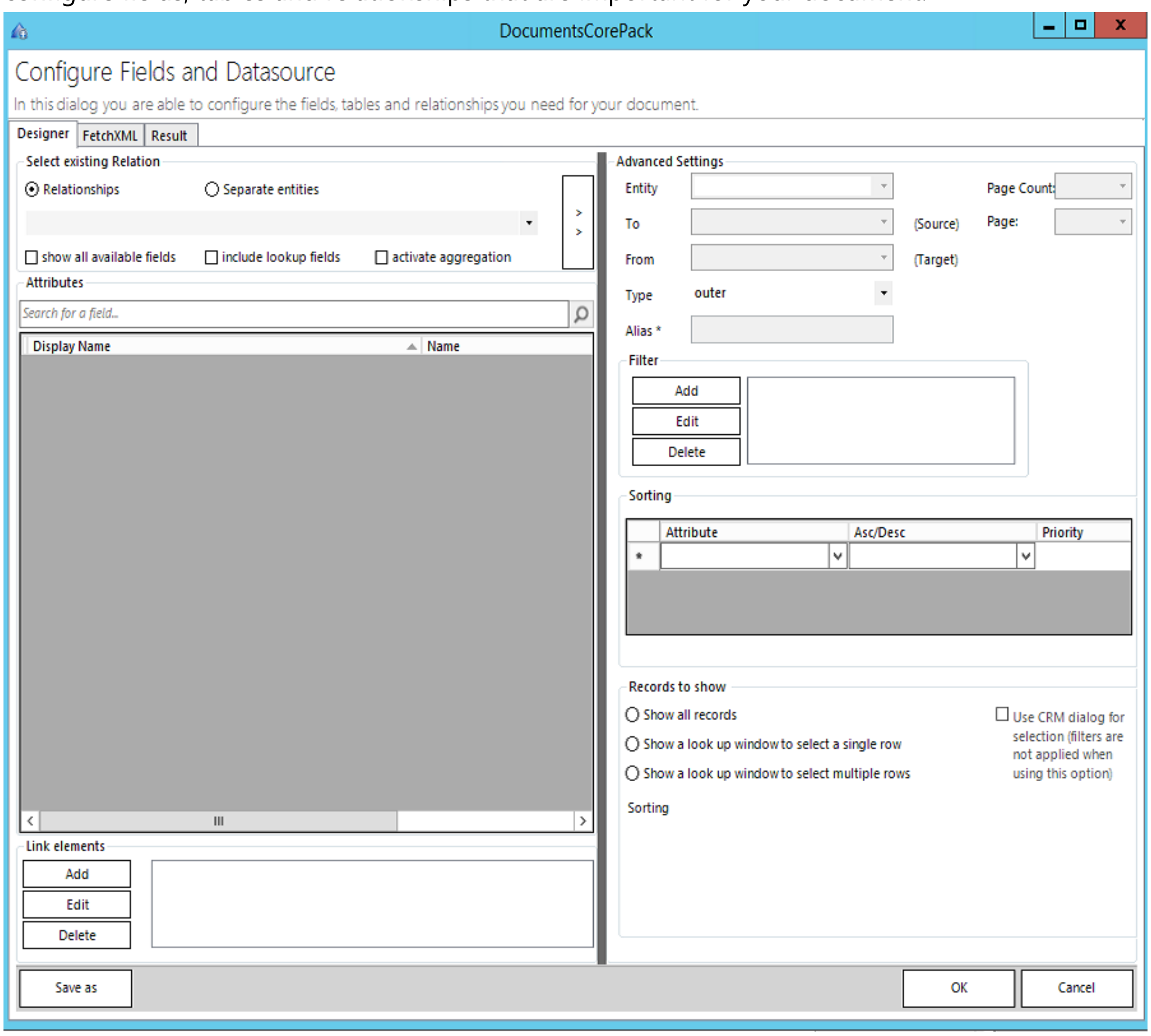
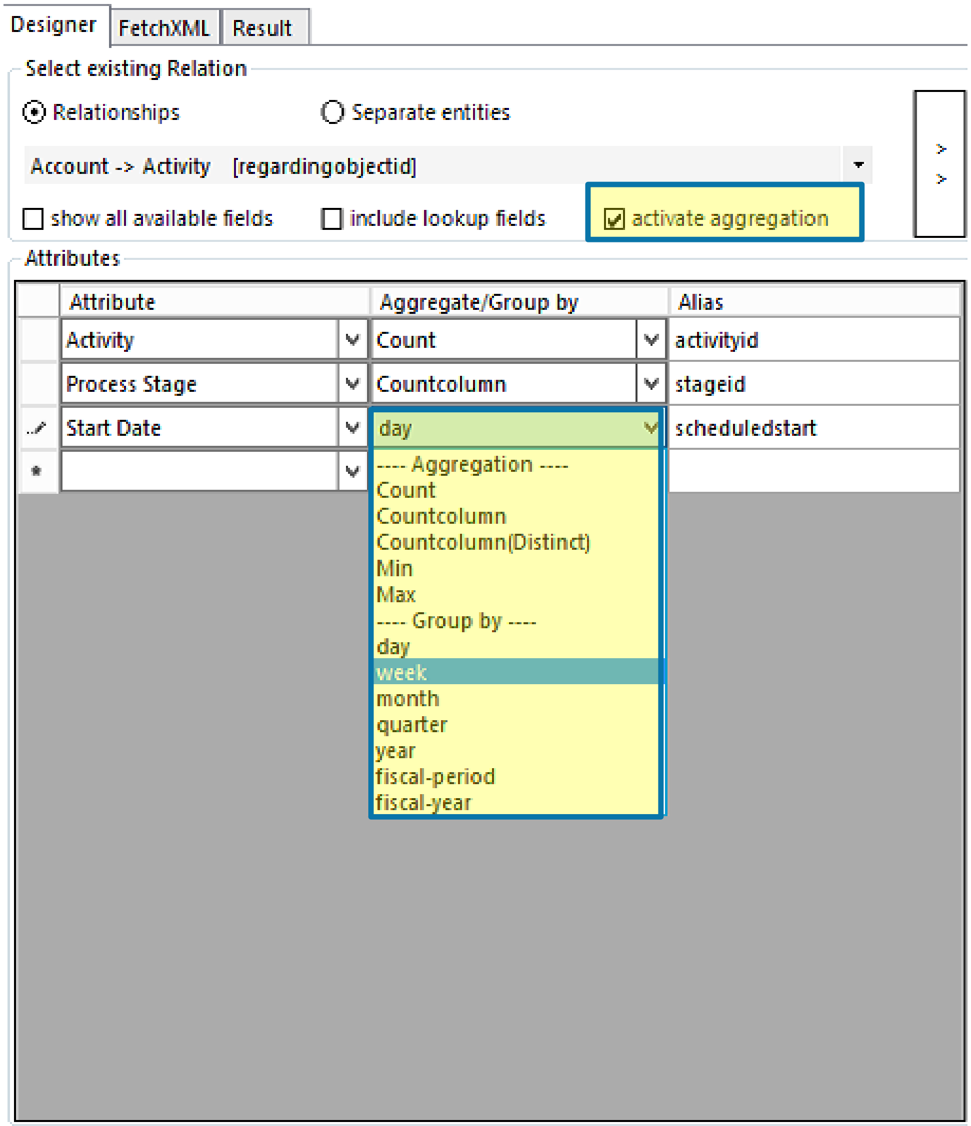


Figure 47: Add New Relationship... - Configure Fields and data source dialog

1.8.1 Aggregation

Checking the activate aggregation checkbox, allows its users to group relationships in certain ways.



The aggregation function allows you to aggregate attributes via the least/most important and to group attributes within specified limits. You can also count attributes (for example the number of employees with a certain function such as CRM administrators, the number of bills generated on a certain day/week/month…)

Please find an example on how to use an aggregation properly in chapter 5.7 HOW TO CREATE AN AGGREGATION FETCH ON PAGE 79.

1.9 Insert Field Button

This feature allows to insert additional contents in your .docx. The ***[Insert]***-button provides you with various insert options. It is a simple and centralized way to insert every MSCRM-field as a "special"-field. To get an overview of your options, you need to follow two easy steps:

1) Select a field in the TreeView of the DocumentsCorePack Template Designer
2) Click on the Drop-Down-menu of the ***[Insert field]***-button at the bottom of the DocumentsCorePack Template Designer:

Opening the drop-down menu provides you with a lot of options that are going to be described in detail with the next chapters:

[Insert as Picture Field]
[Insert as a Picture-Link Field]
[Insert as a Picture-Link Field]
[Insert as Document]
[Insert as HTML]
[Insert Static Item]
[Insert [Computed Item]]
[Insert DocuSign Item]
[Insert AssureSign Item]

The functionalities of DocuSign, as well as of AssureSign, are explained in the e-Signature User Guide, which can be found here.

1.9.1 Insert as Picture Field

This option will insert a place holder for an image.
The image source for the image can be a path to a document.
The Image will be embedded into the document.

This option is not recommended when the generated document will be further used as source for an email as most email clients are not able to display base64 embedded image. Or as they do not allow this type of embedded image can also be used for malicious attacks.

Please find a more detailed tutorial in our How-to-section "How to Insert as Picture Field", page 83.

1.9.2 Insert as a Picture-Link Field

This option will insert a place holder for an image.
The image path should be accessible from all over the network or the web.

This option is recommended if you would like to insert dynamic pictures in your document based on data in CRM.

Please find a more detailed tutorial in our How-to-section, "HOW TO INSERT AS PICTURE LINK FIELD", PAGE 87.

1.9.3 Insert as Document

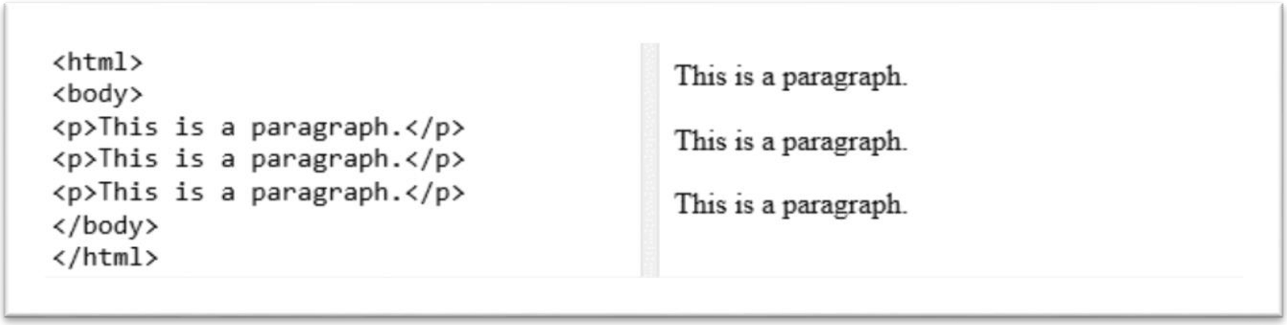
This option will insert a document that has been previously attached as a note in MS Dynamics CRM.

Attaching a document as note basically works like attaching a picture as note (but of course, you have to replace the picture by a document).

Please find a more detailed tutorial in our How-to-section "HOW TO INSERT AS DOCUMENT", PAGE 89.

1.9.4 Insert as HTML

HTML is abbreviation for Hyper Text Markup Language. You will usually come across this term when talking about websites. HTML defines the layout when view in a browser. As Word is also capable of creating HTML pages you also can work the other way around and insert HTML into a document.



```
<html>
<body>
<p>This is a paragraph.</p>
<p>This is a paragraph.</p>
<p>This is a paragraph.</p>
</body>
</html>
```

This is a paragraph.

This is a paragraph.

This is a paragraph.

Figure 49: HTML code (left), compiled HTML (right)

Insert as HTML enables you to insert various HTML contents into templates. The functionality is able to interpret HTML-codes stored in CRM and to display the contents appropriately in merged documents.

A HTML editor or some self-created input written in HTML is required to use the ***[Insert as HTML]*** option. We do not automatically provide you with a HTML editor. If needed, it has to be implemented by you into your CRM system. There are various free and also some charged HTML editors that you could use.

Please find a more detailed tutorial in our How-to-section “How to Insert as HTML”, page 92.

1.9.5 Insert Static Item

This option has two main purposes.
It will insert static documents.
It also includes the possibility to format and structure the document.

Please find a more information in our How-to-section “How to insert as static item”, page 93.

1.9.6 Static document

This option allows you to insert a sub template into your current template.
It was as well designed to insert further text documents like, for example, General Terms and Conditions.

Please find a more detailed tutorial in our How-to-section “How to insert as static document, page 93.

1.9.7 Page Break

This option enables you to insert a dynamical page break into your document.

The Insert Page Break – option also works with table. If you, for example, have a table with product information and you insert a “Page Break” – item, you will automatically get an extra page for each product as a result.

Please find a more detailed tutorial in our How-to-section “How to insert Page Break”, page 97.

1.9.8 Remove Empty Lines

“Remove Empty Lines” – fields are a simple way to dynamically structure your document after a merge process. For example, if you want to delete unnecessary lines between contacts and opportunities, simply insert such a “Remove Empty Lines”-field. This option enables you to insert dynamical “Remove Empty Lines” into your document.

The “Remove Empty Lines” – fields are very useful when subdocuments or HTML-content are inserted.

Please find a more detailed tutorial in our How-to-section “How to insert Remove Empty Lines”, page 98.

1.9.9 Join Tables

This option combines tables, making a single table out of it.

In this example we have 2 tables from an additional entity but want those two Fields grouped together in one table. So we have inserted a <<jointables>> between the tables, and if this template will be merged the tables get joined together.

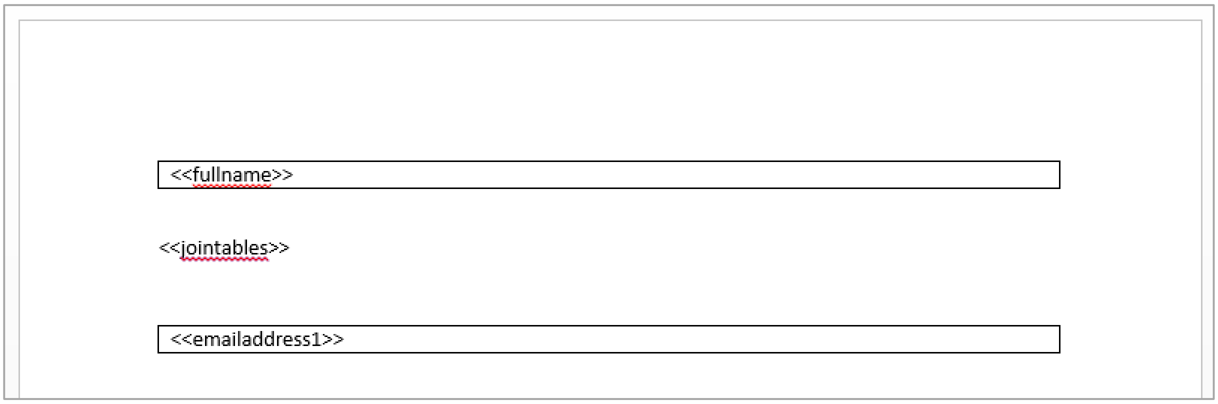


Figure 50: Two tables with the <<jointables>> command before a merge

As you can see in the following screenshot in this Template is just one single table will all merged field from above.

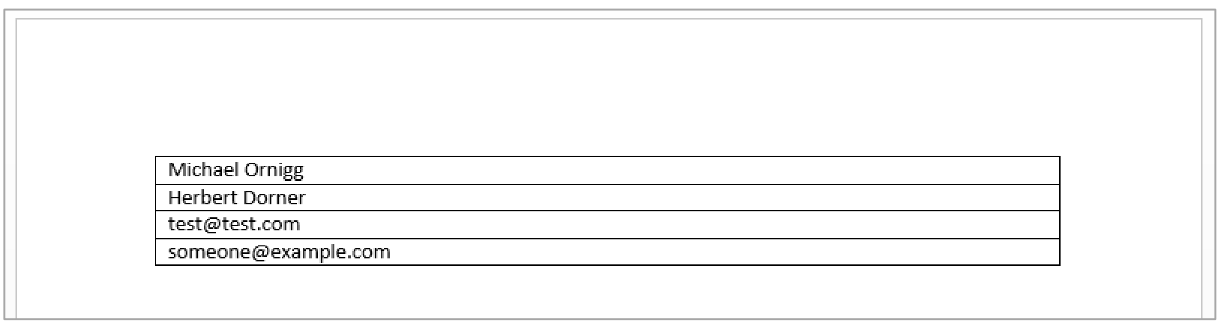


Figure 51: Two tables with after the <<jointables>> command was executed

Please find a more detailed tutorial in our How-to-section "HOW TO INSERT JOIN TABLES", PAGE 99.

1.9.10 Insert [Computed Item]

This option empowers users to make basic arithmetic operations with MS Dynamics CRM number-fields. Please find a more detailed tutorial in our How-to-section "HOW TO INSERT COMPUTED ITEMS", PAGE 100.

1.9.11 Insert [QR Code]

"Insert QR Code" – fields help you to define a pattern for a dynamically created QR-Code. The example below shows a QR-Code (2) that is based on a CRM field in a template 1.

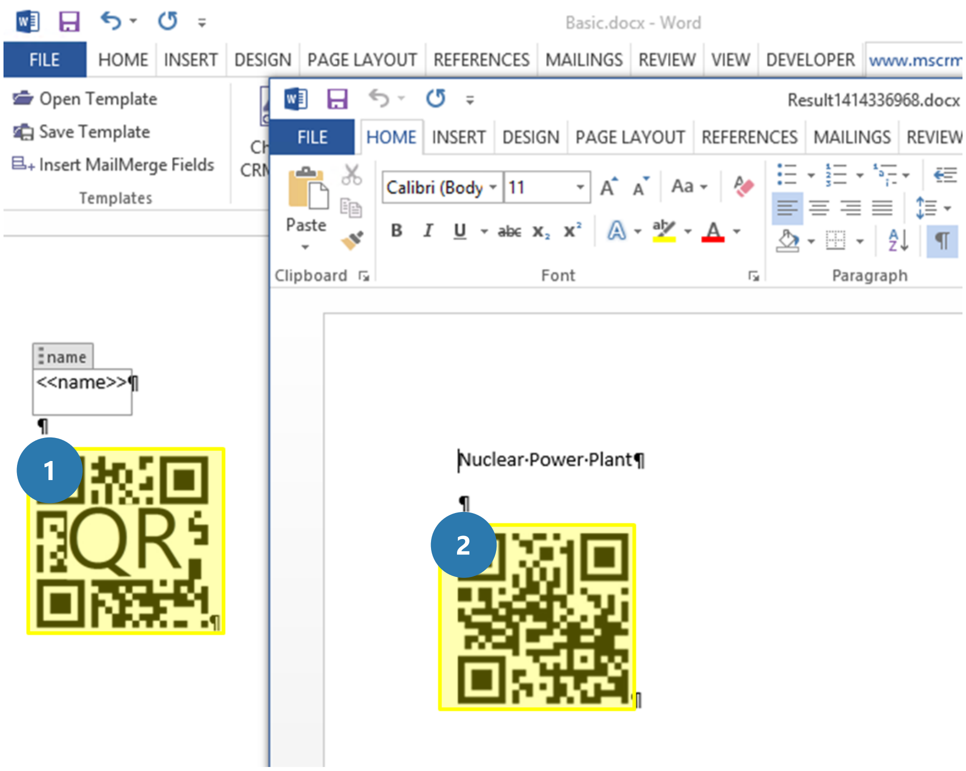


Figure 52: Example of inserted QR Code and CRM field in a template

Please find a more detailed tutorial in our How-to-section "HOW TO INSERT QR CODES", PAGE 101.

1.9.12 Insert [Advanced String]

The "Advanced String" field allows you to define a pattern for a dynamically created string.
The example below shows an advanced string (2) based on placeholder in a template 1.

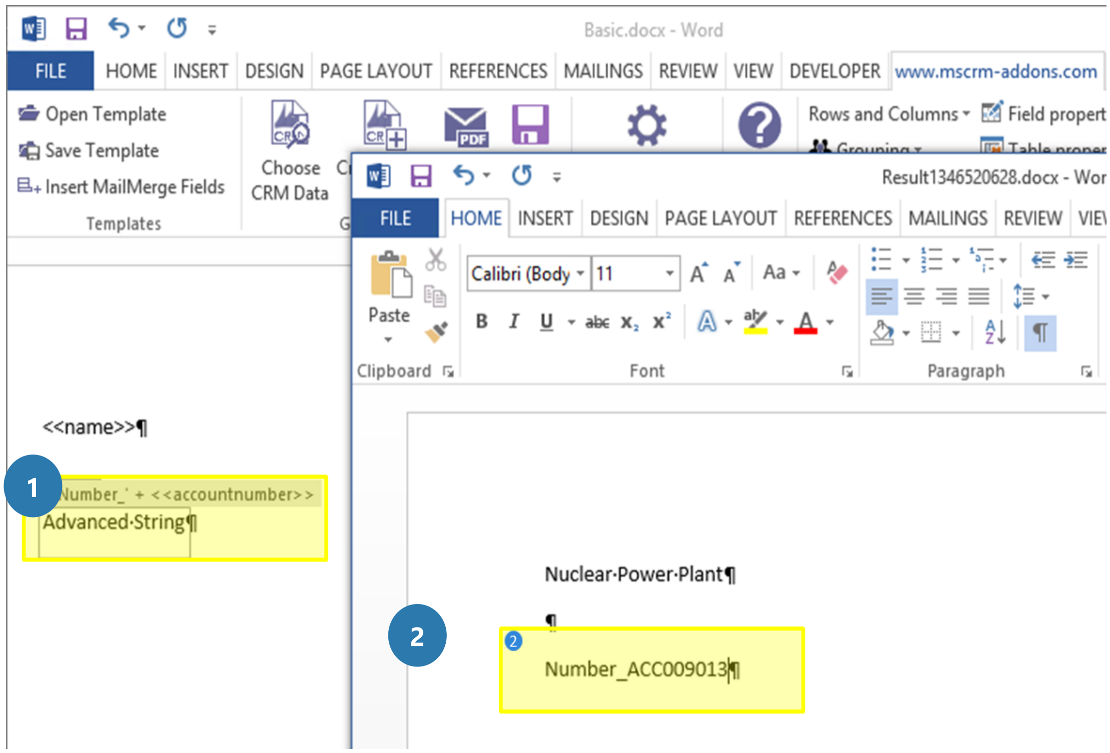


Figure 53: Example of dynamic string

Please find a more detailed tutorial in our How-to-section "HOW TO INSERT AN ADVANCED STRING", PAGE 103.

1.9.13 Insert [Calculated field]

The “Calculated Field”-option allows you to evaluate calculations of data from CRM.
The example below shows an evaluated calculation based on CRM fields.

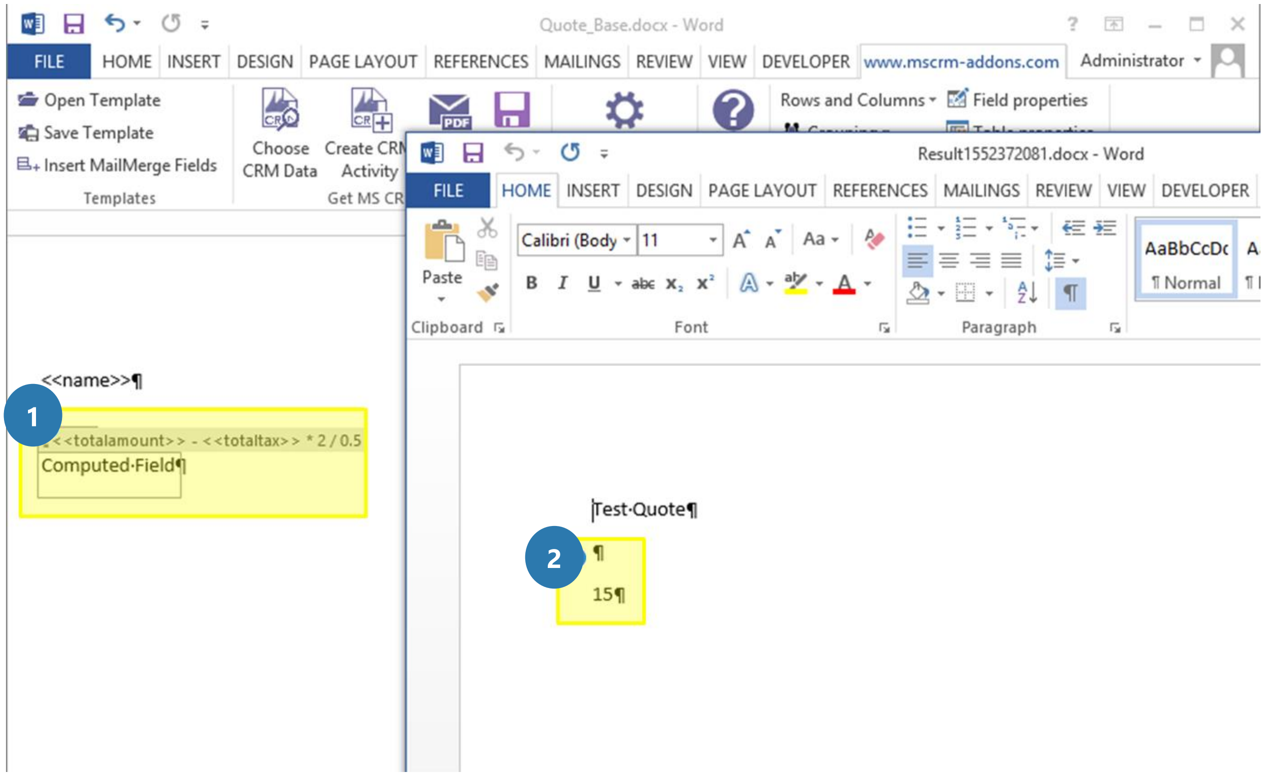


Figure 54: Example of Computed field

Please find a more detailed tutorial in our How-to-section “HOW TO INSERT CALCULATED FIELDS”, PAGE 105.

1.9.14 Insert [Hyperlink]

The "Hyperlink" – option allows you to define a pattern for a dynamically created link.
The syntax for the field is described here. (SEE: PAGE 58, 3.1.1 STRINGS (BASIC SYNTAX) F.)

Please find a more detailed tutorial in our How-to-section "How to insert Hyperlink", page 107.

1.9.15 Insert DocuSign Item

This option requires the installation of a different product.
An explicit description can be found on our homepage in the Documentation section here.
The guide describing this functionality is called “DocumentsCorePack e-Signature User Guide”.

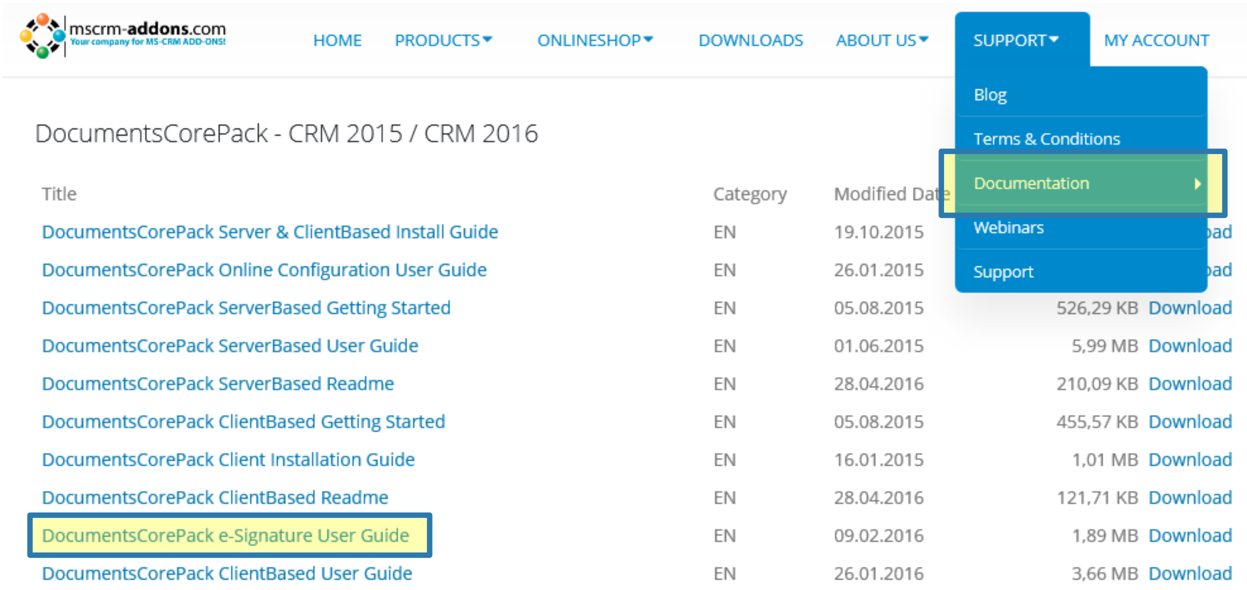


Figure 55: mscrm-addons.com documentation section

1.9.16 Insert AssureSign Item

This option requires the installation of a different product.
An explicit description can be found on our homepage in the Documentation section here.
The guide describing this functionality is called “DocumentsCorePack e-Signature User Guide”.

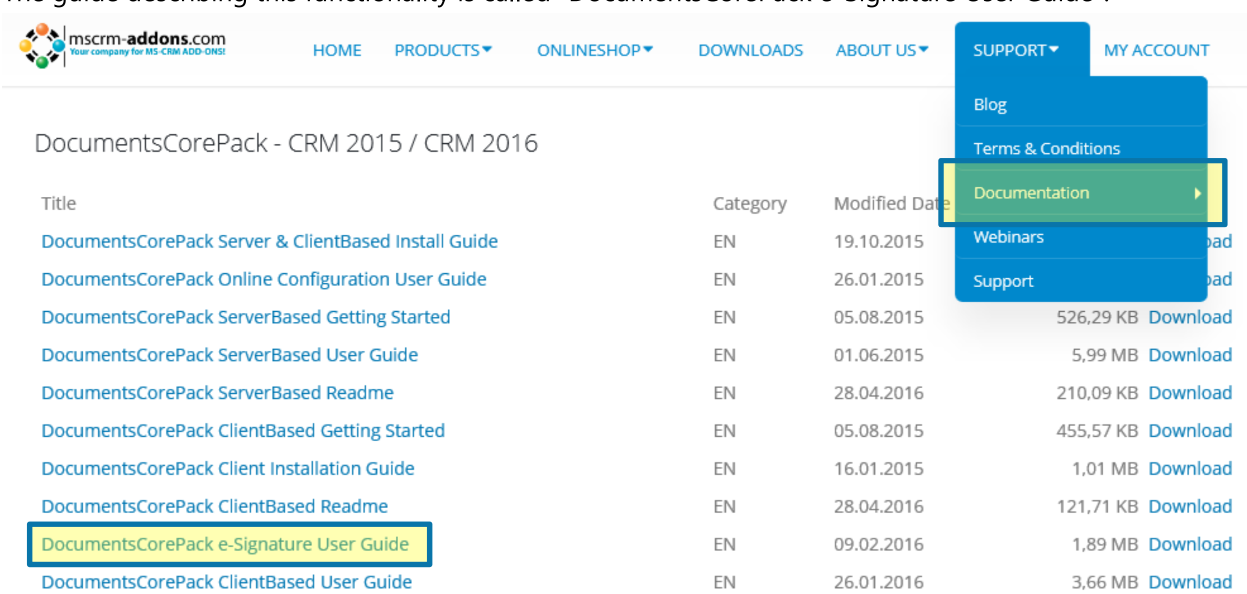


Figure 56: mscrm-addons.com documentation section

1.10 Field Properties

Depending on the type of the field type that you have added in the document, you can call the properties windows. To do so, simply click on the corresponding field (1) and then on the ***[Field properties]***-button (2).

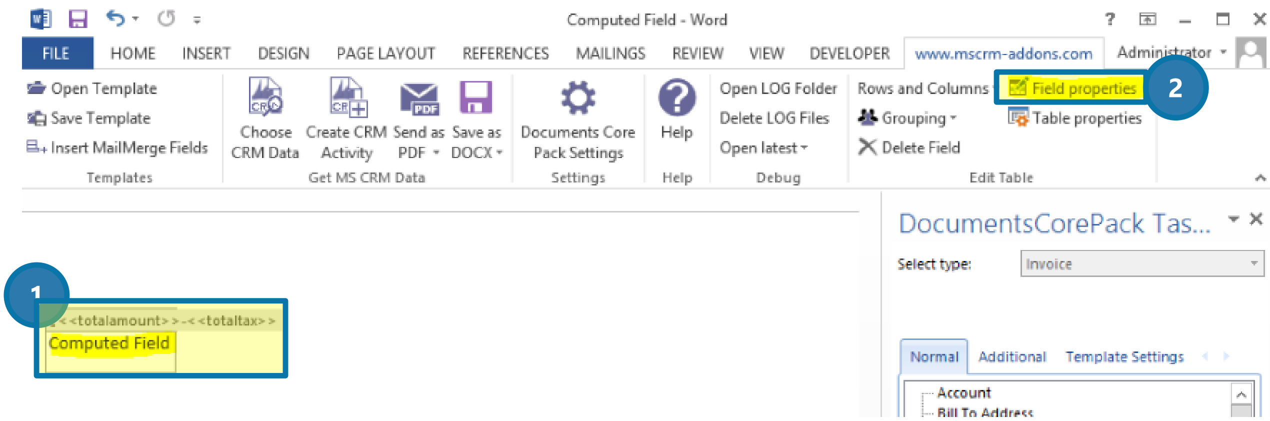


Figure 57: mscrm-addons.com documentation section

Please find a more detailed tutorial in our How-to-section "HOW TO INSERT FIELD PROPERTIES", PAGE 109.

2 DocumentsCorePack Template Designer Advanced

The following chapters provide you with an overview of the advanced capabilities of Template Designer.

They focus on the following options:

- Add entities
- Manage tables

2.1 Manage Tables

The manage tables function allows you to insert/manage/edit/customize tables and relationships.
To open it, simply open the ***[Add Relationship/Entity]***-Drop Down menu in the DocumentsCorePack Additional tab and select the option *Manage relationships* in the menu you are provided with.

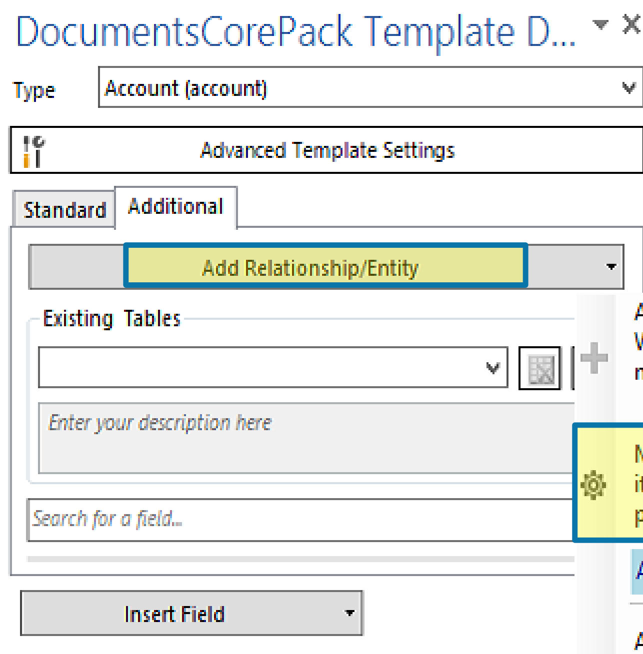


Figure 59: Template Designer – Add Relationship/Entity

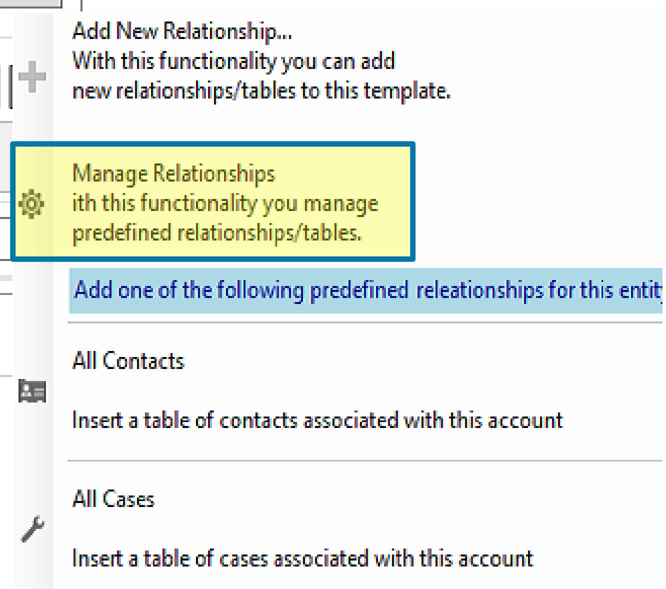


Figure 59: Add Relationship/Entity – Drop Down Menu

2.1.1 The manage relationship window

All customizations for tables and relationships can be done here.

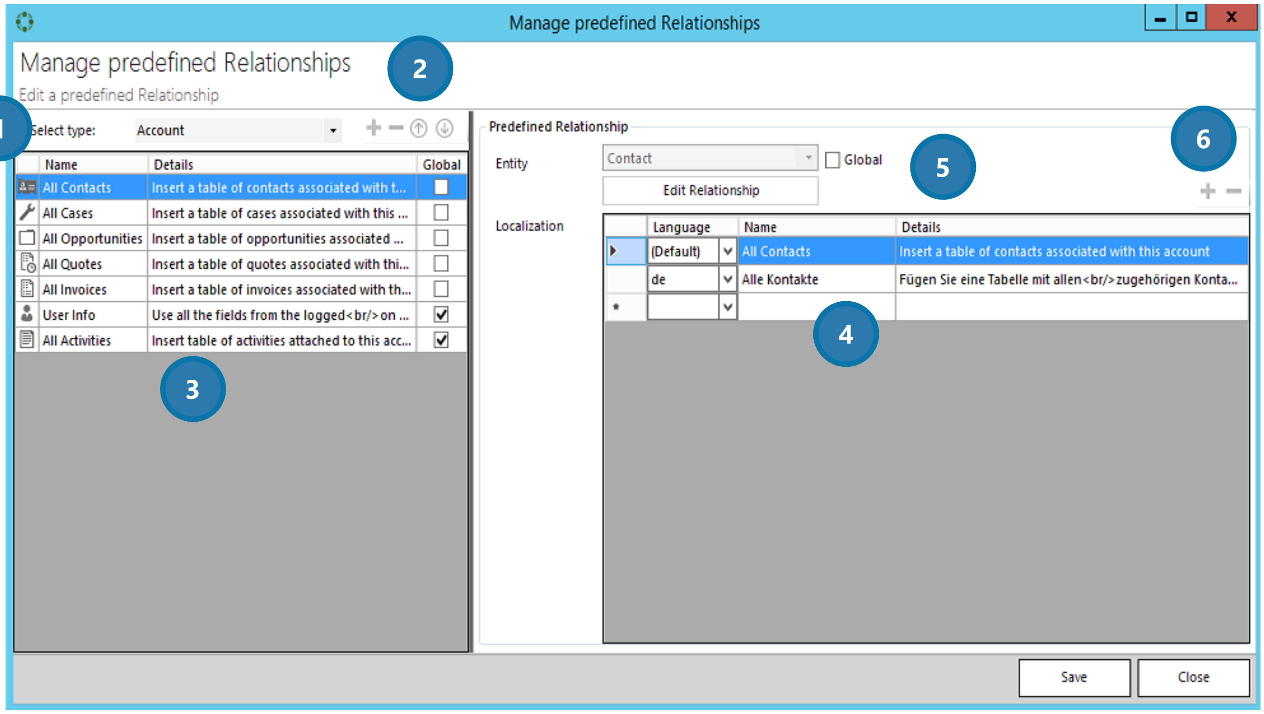


Figure 60: Manage relationships window

❶ Select type drop down

In the select type drop down menu you can select which type of entity you would like to work with.

The details shown in the list (see ❸) vary – depending on which entity you have previously selected. Global relations (which are checked automatically) are the same for all entities, whereas special relations have to be checked by the user.

❷

The plus, the minus and the up and down arrows allow you to customize your buttons.

Figure 61: Customize entities buttons

Click on the ***[Plus]***-button in order to add a predefined relationship. For further information on how to do so please have a look at chapter 1.8 ADDITIONAL RELATIONSHIPS, PAGE 38.

The ***[Minus]***-button allows you to delete predefined relationships. To do so, simply mark the relationship you would like to delete and click on the ***[Yes]***-button when you are asked if you want to delete it.

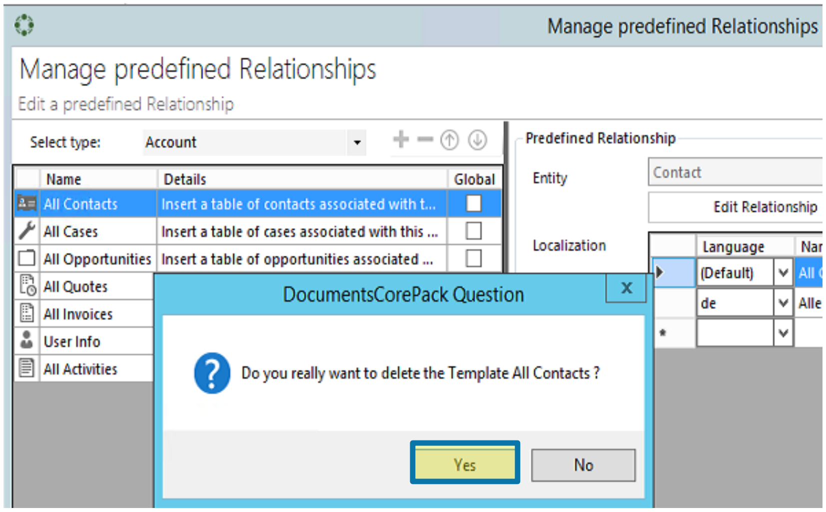


Figure 62: Manage Relationships – how to delete relationships

The ***[Up]*** and ***[Down]***- arrow buttons allow you to determine in which order the relationships should appear in the *Add Relationship/Entity drop down menu*. For more information on that menu, please have a look at CHAPTER 1.7.1 ADD RELATIONSHIPS/ENTITY, PAGE 36

❸ The *select type list preview* gives you an overview of the relations that are displayed in the *Add Relationship/Entity drop down menu*. For more information on that menu, please have a look at CHAPTER 1.7.1 ADD RELATIONSHIPS/ENTITY, PAGE 36.

❹ The *select localization list preview* offers you the possibility to customize your entities regarding to the languages that you use in your Microsoft Dynamics CRM settings.

❺

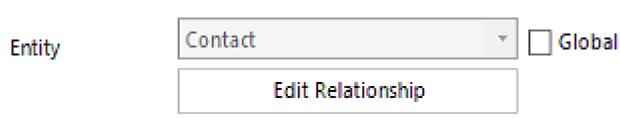


Figure 63: Manage predefined relationships – entity settings

The entity settings at the right side allow you to customize the entity that is related to your previously selected main entity in the type selector. If the checkbox next to *Global* is checked, the entity will be added to the global entities of this relation.

❻ Hit the ***[Plus]***-button in order to add a new field to the *select localization list preview*. Hit the ***[Minus]***-button in order to delete a previously marked field.

3 Advanced template options

Besides the standard options, DocumentsCorePack Template Designer offers additional options that facilitate the designing of templates, such as:

- Advanced syntax structures
- Calculate (advanced) arithmetic issues

The following chapters provide you with an overview of the advanced template options.

3.1 DocumentsCorePack Client Property Syntax

Certain properties of DocumentsCorePack templates can consist of fixed text and CRM fields. There are also some additional function calls available. Also, data from CRM can be manipulated.

Several DocumentsCorePack properties support the same syntax. The 3 major different syntax types are strings, calculations and conditions.

3.1.1 Strings (basic syntax)

The basic syntax for string properties follows the following rules.

Fixed text has to be typed manually in the text field and has to be enclose with single quotes (" ' ")

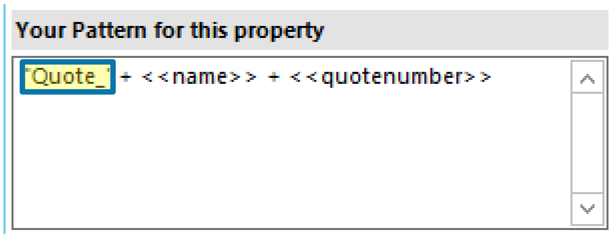


Figure 64: Property syntax - fixed text

Fixed text has to be typed manually in the text field and has to be enclose with single quotes (" ' ").

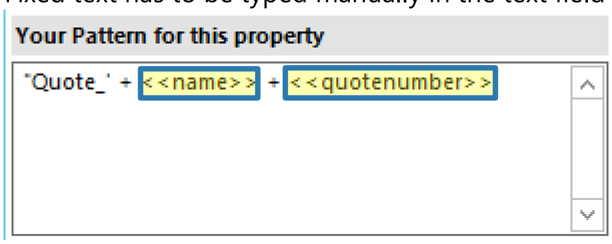


Figure 65: Property syntax - fields

To combine several CRM fields and fixed text you have to use the plus sign ("+").

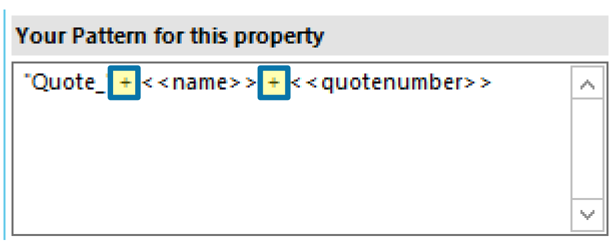


Figure 66: Property syntax - plus signs

3.1.2 Strings (advanced syntax)

Function calls can be applied to CRM fields by using the "." and the actual function call.
There are also standalone method calls supported. The function call has to end with brackets. Certain functions also support parameters or have mandatory parameters.

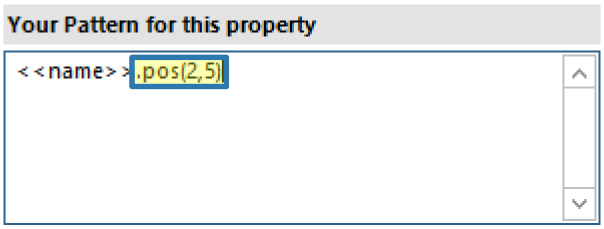


Figure 67: Property syntax - function call pos with parameters 2 and 5

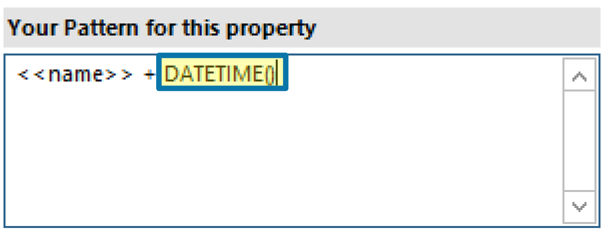


Figure 68: Property syntax - Standalone function DATETIME without parameters

The following table contains a list with all available functions that can be applied to CRM fields.
For all examples bellow please assume the <<*name*>> field will be "*MSCRM-addons.com*" after the merge.

Function	Description	Example
<<name>>.pos(x,y)	will insert y signs from the xth position.	<<name>>.pos(2,5) Result: "CRM-a"
<<name>>.left(x)	will insert the first x – signs. E.g.: <<name>>.left(5)	<<name>>.left(5) Result: "MSCRM"
<<name>>.right(x)	will insert the last x signs of the string. E.g.: <<name>>.right(3)	<<name>>.right(3) Result: "com"
<<name>>.upper()	displays all values in the field in capital letters.	Result: "MSCRM-ADDONS.COM"
<<name>>.lower()	displays all values in the field in small letters.	Result: "mscrm-addons.com"
<<name>>.caps()	displays the first letter in the field before as capital letter.	Result: "Mscrm-addons.com"
<<name>>.firstcaps()	displays the first letter in a sentence in capital letter	Mscrm-addons.com
<<name>>.invert()	reverses every case	Result: "mscrm-ADDONS.COM"

Figure 69: Table - List of function calls for fields

The following table contains a list with all available functions that can stand alone to CRM fields

Function	Description	Example
guid()	generates a unique serial number	b8a4d649-342e-4bfc-9a6f-b4afd4741b4
DATETIME()	inserts the actual and local date and time	06.12.2013 16:06
DATETIME(DD.MMMM.YY mm:ss, de-DE)	There are many different formatting options for displaying the culture name for different countries For more information please click here.	06.Dezember.1316:06
DATETIME(DD.MMMM.YY ' ' mm:ss, de-DE)	For more information about the different cultures which can be displayed, please click here.	06.Dezember.13 16:06

Figure 70: Table - List of standalone functions

3.1.3 Calculations

The syntax for this field supports the basic arithmetic operations.
/ divide
* multiply
+ add up
- substract

3.1.4 Conditions

It is often required to place conditional fields within a template
(for example: only print address lines when stored in the regarding CRM-record.)

Syntax

The syntax needed is pretty simple:

{if"<<CRM_FIELD>>"="XY" "Content if condition is fulfilled" "Content if condition is not fulfilled"}

Yellow marks the condition
Green marks the content that will be printed if the conditions are fulfilled
Red marks the content that is printed if the condition is not met.

The {} - brackets are not just standard wavy-brackets but field-functions of MS Word and have to be inserted by pressing Strg+F9 or via "Insert"->"Quick-parts"->"Field" and choosing "if".
By default, field functions are not shown within MS Word. To switch views one can simply press Alt + F9.

Examples

<u>Printing a gender-specific salutation:</u>
Dear {if"<<salutation>>"="Mr." "Mister" "Misses"} <<lastname>>

<u>Showing fields only if available within CRM:</u>
{if"<<emailaddress1>>"<>"" "Email: <<emailaddress1>>" ""}
{if"<<mobilephone>>"<>"" "<<mobilephone>>"}

Common problems

Field – code brackets cannot be inserted inside a content control, so please ensure that the content control of the CRM-field you are using is not marked when trying to insert the {}-brackets.
For some reasons it is not possible to insert the brackets even outside the content-controls (once there is nothing else than the content-control in the whole line).
To get rid of this issue, you can simply insert any text or a space after/before the field and insert the {} brackets afterwards. In our example, the {} cannot be inserted in the upper line of this picture without placing any kind of text. In the second line a space has been inserted after the name-field.

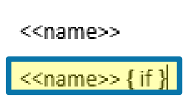


Figure 71: Common syntax problems: enter {} properly

4 Available demo templates

DocumentsCorePack already has a set of template to allow you to quickly start

Name	Function/Usage	Minimum Data Input
Account reconnect	Simple account template just with fields from account entity.	The sample data
Account overview	Simple account template with tables which contain data from the given entities.	The sample data and data from each additional entity
Contemporary letter		
List of accounts related to this account	Shows all accounts related to the selected account.	The selected account should contain other related accounts.
List of contacts related to this account	Shows all contacts related to the selected account.	The selected account should contain other related contacts.
Account QR Code	How to use the QR-Code-Field with the Account entity	The sample data
Activity Overview	Simple activity template with tables which contain data from the given extra entities.	The sample data and data from each additional entity.
Contact Reconnect – Gift Certificate	Simple Activity Template just with fields from the Activity entity.	The sample data
List of Accounts related to this contact.	Shows all accounts from the selected contact.	The selected contact should contain other related contacts.
Quote Base	Simple Quote Template just with fields from the quote entity.	You should have at least one quote.
Quote with Grouping Base	Simple Quote Template.	You should at least have one quote, some products and some prices.
Quote QR Template	How to use the QR-Code-Field with the Quote entity.	You should at least have one quote, some products and some prices.
Invoice Base	Simple invoice template just with fields from the invoice entity.	The sample data
Invoice with grouping base	Simple invoice template.	The sample data.
Newsletter to all accounts of this marketing list	Generates a document for each account in a marketing list.	You should have a marketing list with at least one account.
Opportunity Base	A simple sample template for an opportunity letter.	The sample data.

Figure 72: Table - List of demo templates

5 Tutorials (“How To’s”)

Please find a list of all available “How-To’s” that are described in this document.

5.1 How to create DocumentsCorePack templates

Office Open XML has been invented to enable the creation of very complex templates that would normally require the use of macros.

This chapter contains a step-by-step description about how to create a template. We decided to create a so called “quote-with-grouping-template”, because it is most likely used by Microsoft Dynamics CRM users. (“Quote-with-grouping” means that the quote-products are grouped by the value of a specific CRM-attribute, e.g. subject.)

5.1.1 Step 1. Create a template layout by selecting an entity.

First, we need to create the basic layout of the template. Clicking on the ***[Insert MailMerge Fields]*** menu button in the www.mscrm-addons.com command bar will open the DocumentsCorePack Template Designer. Please see CHAPTER 1.2 HOW TO OPEN THE DOCUMENTSCOREPACK TEMPLATE DESIGNER ON PAGE 7 for details.

Anyway, to create the basic layout for, e.g. a quote-with-grouping-template, we must select the type “Quote” in the Type-Selector-Dropdown Menu. Each template is based on a specific entity.

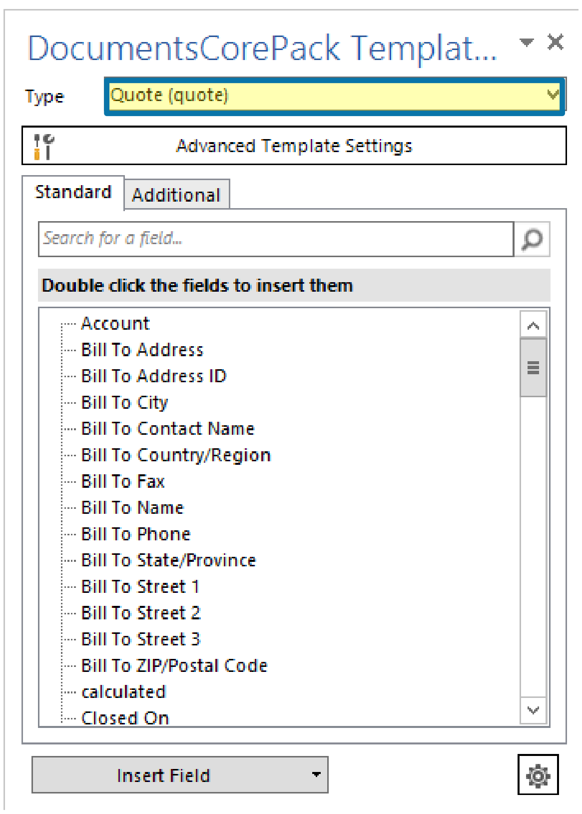


Figure 73 Template Designer – Selected entity: Quote

5.1.2 Step 2: Insert Fields

Now that we have selected an entity, we need to insert fields to our template. To do so, we set the cursor at the position where we would like to insert a certain entity. Then, we double click the field. You could as well insert a field via the ***[Insert field]***-button. (SEE CHAPTER 1.9 INSERT FIELD BUTTON, PAGE 40)

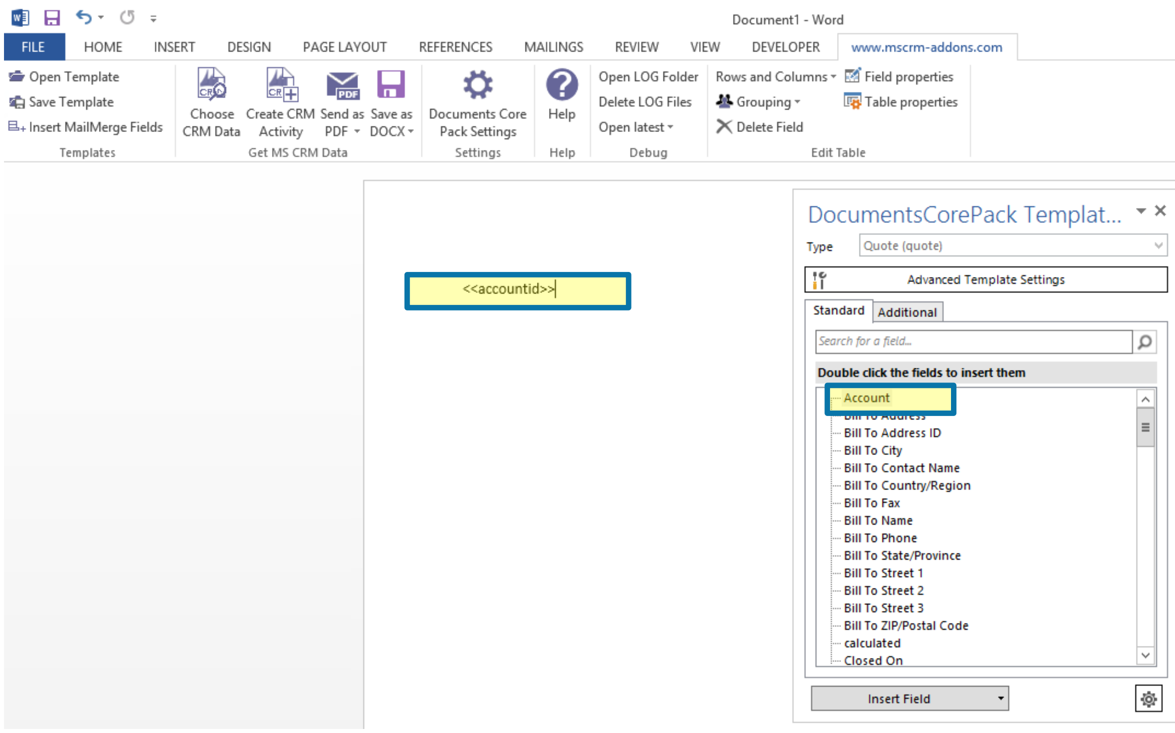


Figure 74 Template Designer – Insert fields

Once you have inserted all the fields you would like to insert, your template could look like this:

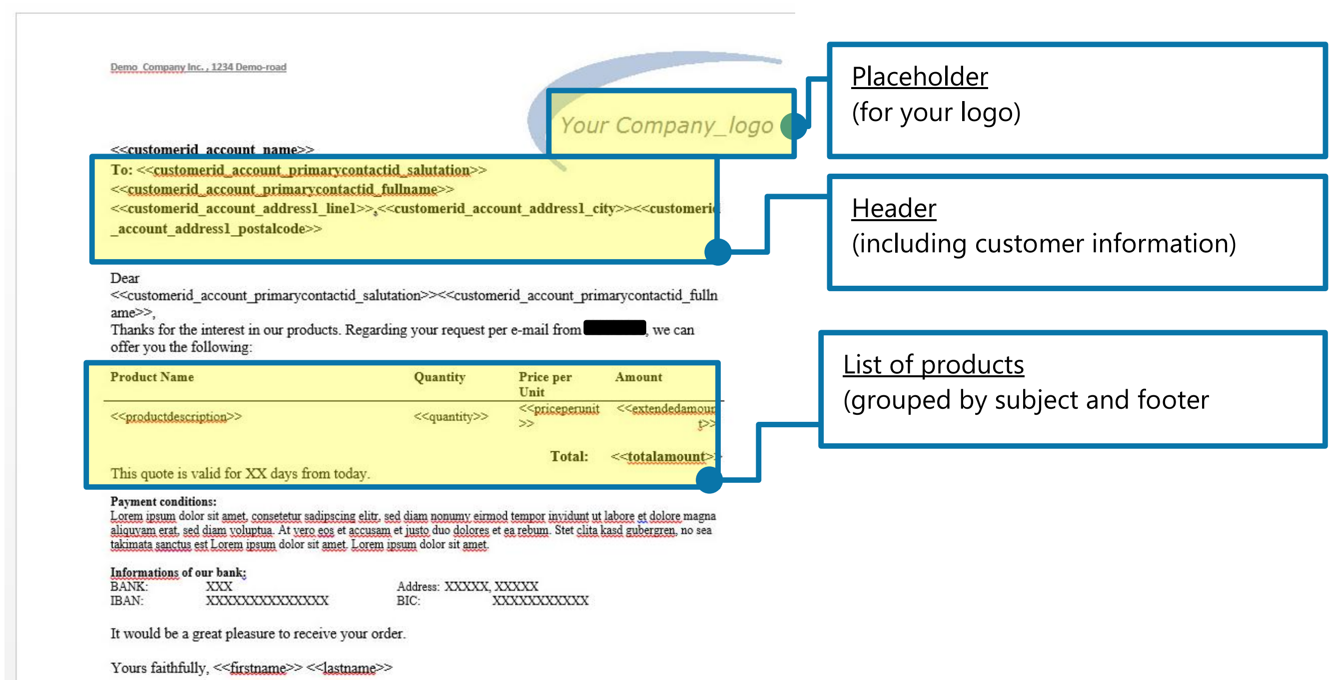
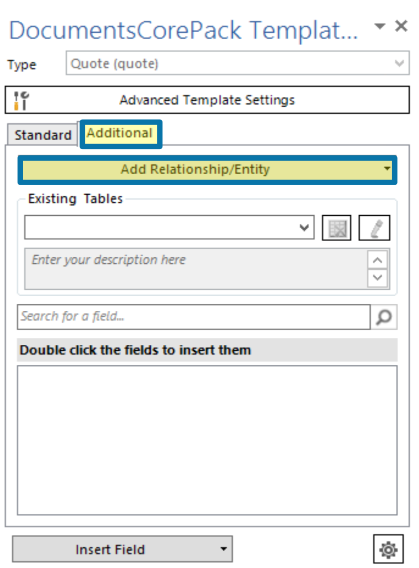


Figure 75 Template with inserted fields

5.1.3 Step 3: Add line-item relationship

The next step is to resolve the quote-quote product relationship. To do so, we need to click on the [Additional]-tab in the DocumentsCorePack Template Designer. The „Additional" section allows to resolve any relation/entity within CRM and brings up a list of all attributes from the related entities so that they can be used within the document too.



Here, we click on the ***[Add Relationship/Entity]***-button in order to add a new relationship. Learn more about how to add relationships and entities in CHAPTER 1.7.1 ADD RELATIONSHIPS/ENTITY ON PAGE 36.

Figure 76 Template Designer Additional tab

We use the *Configure fields and data source* – dialog to resolve the fields, tables and relationships we need for our document. Please find further information on how to configure additional fields and relationships in CHAPTER 1.8 ADDITIONAL RELATIONSHIPS PAGE 38.

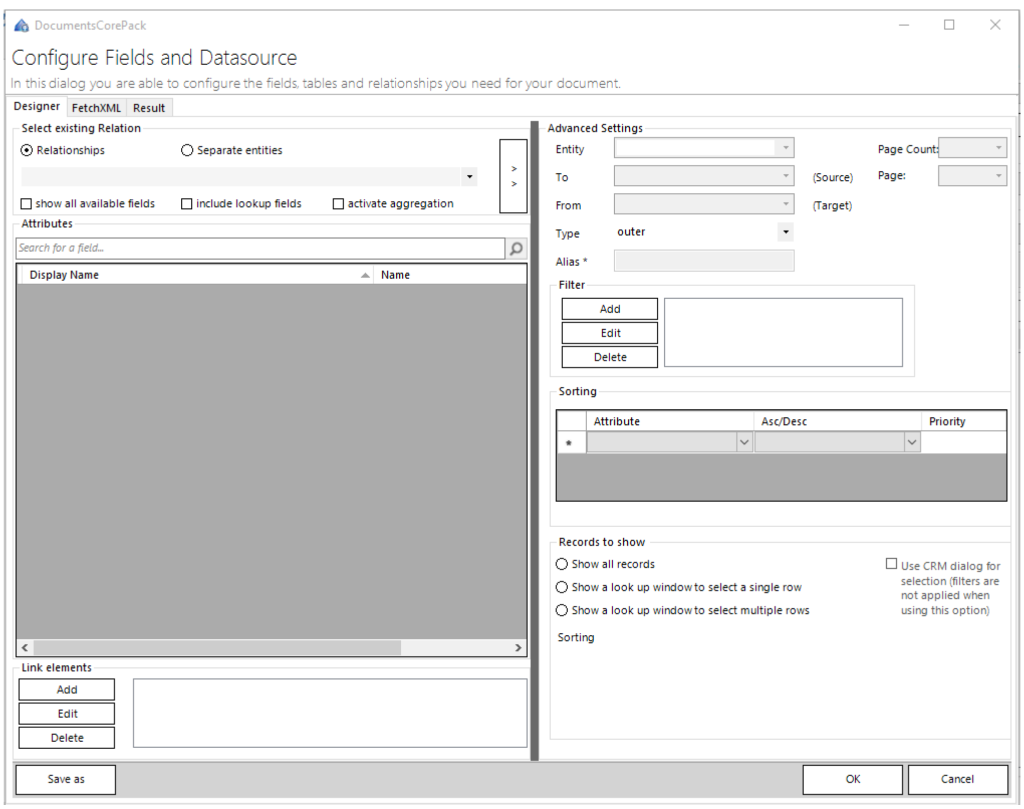


Figure 77 Configure fields and data source dialog

For our example we decided to select *Quote -> Quote Product [quoteid]*. As a result, the available fields of this relationship are displayed in the *Attributes* field of the *Configure fields and data source dialog*. As soon as we click on the [OK]-button, all the selected fields will be related to the Quote Product table.

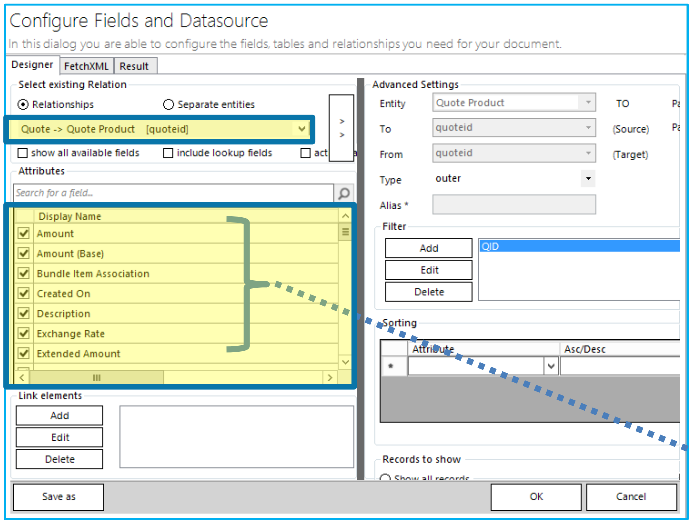


Figure 79 Configure fields and data source dialog with selected relationship

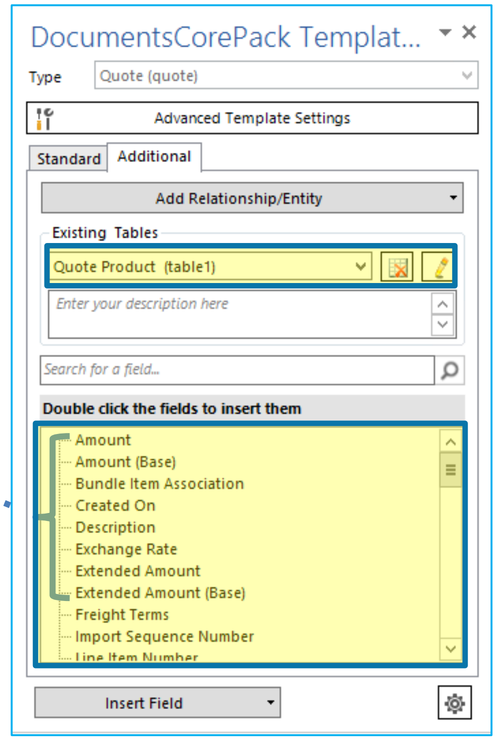


Figure 78 – Template Designer: Additional tab with table and corresponding fields.

Only the fields checked in the Attributes field will later be visible in the DocumentsCorePack Template Designer.

5.1.4 Step 3: Insert the table

The procedure of inserting a table of items is completely automated, so we just need to set the curser to the position where we want to add the table and double click on one of the fields that we have previously added to the table. As soon as we do so, the following dialog appears:

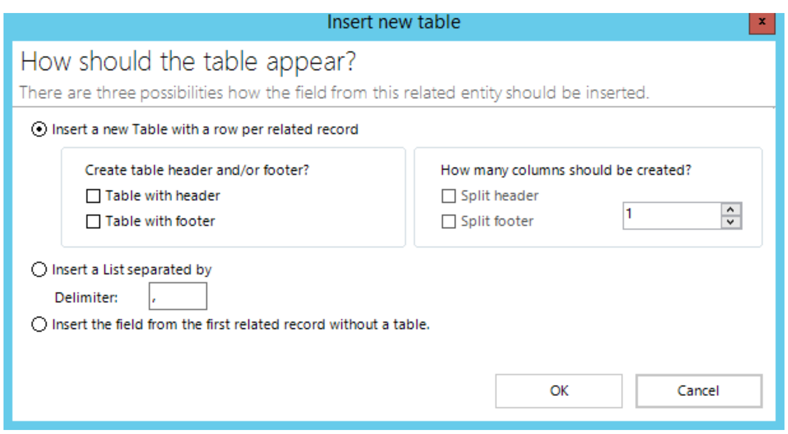


Figure 80 – Insert new table

Within this dialog, you can select between three possibilities how the fields should be inserted to the table. In our example, we decided to insert a new table with a header and a footer and clicked on ***[OK]***.
As a result, the table will be inserted at the determined position:

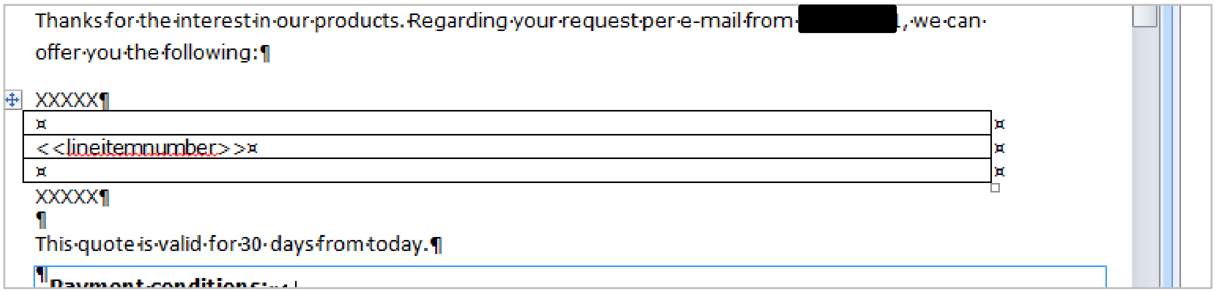


Figure 81 – Insert table (Result)

5.1.5 Step 4 Format the table

Once we have inserted the table, we can add fields like quantity, product-name or even a table header including column-names with the formatting options available in the www.mscrm-addons.com - tab.

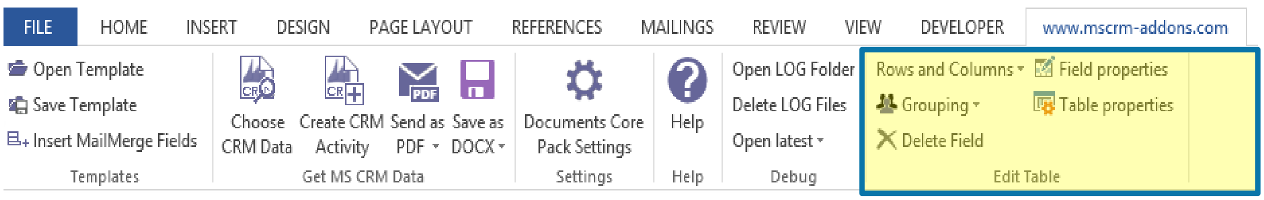


Figure 82 – mscrm-addons.com tab – Rows and Columns

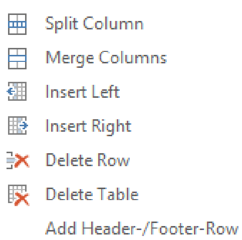


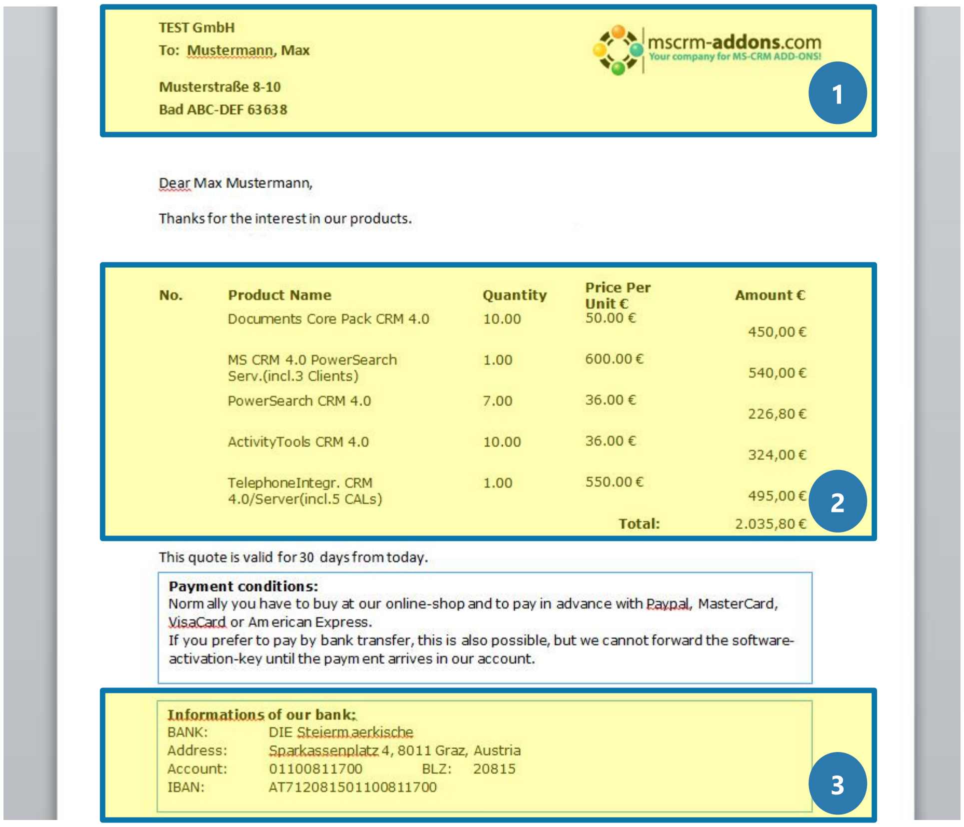
Figure 83 – column customization

With a click on the *Rows and Columns* – Dropdown, you get the possibility to split or merge the columns, to insert a right or left column, to delete a row or a table and to add a header or a footer row. For further information on how to configure field properties, please have a look at CHAPTER 1.10 FIELD PROPERTIES PAGE 52.

It is of upmost importance to insert the header, as well as the footer, exclusively via the www.mscrm-addons.com – tab in the command bar!
Do not enter them via Microsoft Word!

5.1.6 Step 5 Get the result!

After saving the document and selecting our CRM-data we can see the result with the replaced fields at the top 1, the line item table including the sum in the middle 2 and the bank-details at the bottom 3.



TEST GmbH
To: Mustermann, Max

Musterstraße 8-10
Bad ABC-DEF 63638

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

1

Dear Max Mustermann,

Thanks for the interest in our products.

No.	Product Name	Quantity	Price Per Unit €	Amount €
	Documents Core Pack CRM 4.0	10.00	50.00 €	450,00 €
	MS CRM 4.0 PowerSearch Serv.(incl.3 Clients)	1.00	600.00 €	540,00 €
	PowerSearch CRM 4.0	7.00	36.00 €	226,80 €
	ActivityTools CRM 4.0	10.00	36.00 €	324,00 €
	TelephoneIntegr. CRM 4.0/Server(incl.5 CALs)	1.00	550.00 €	495,00 €
			Total:	2.035,80 €

2

This quote is valid for 30 days from today.

Payment conditions:
Normally you have to buy at our online-shop and to pay in advance with Paypal, MasterCard, VisaCard or American Express.
If you prefer to pay by bank transfer, this is also possible, but we cannot forward the software-activation-key until the payment arrives in our account.

Informations of our bank:
BANK: DIE Steiermaerkische
Address: Sparkassenplatz 4, 8011 Graz, Austria
Account: 01100811700 BLZ: 20815
IBAN: AT712081501100811700

3

Figure 84 – DocumentsCorePack Template - Result

That is how you create a DocumentsCorePack Template! In the course of the next chapter, you will learn how to test your template!

5.2 How to test your template

So you have successfully created or modified a template and now you would like to give it a try. With our Step-by-Step instruction on how to do so in DocumentsCorePack Client, this is a piece of cake.

5.2.1 Step 1: Open your Template

Ensure yourself that you have opened your template in Word by using the ***[Open Template]***-button. If the template is not opened in Word or if the template is not a DocumentsCorePack template the following steps will most likely not work.

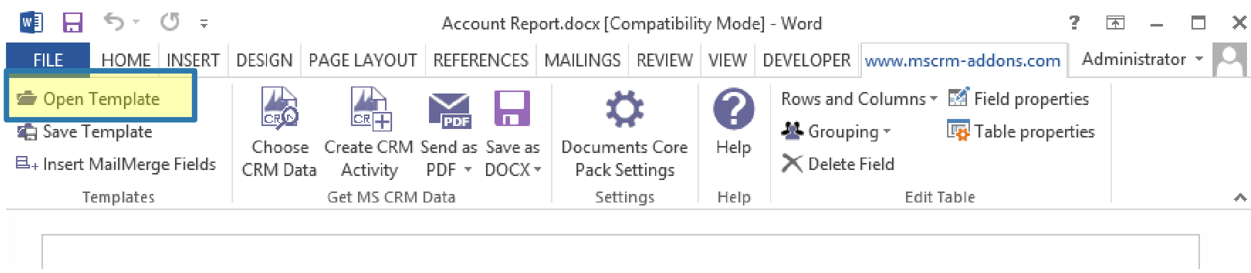


Figure 85: www.mscrm-addons.com tab - Open Template:

5.2.2 Step 2: Choose CRM Data

Press ***[Choose CRM Data]*** in the www.mscrm-addons.com tab.

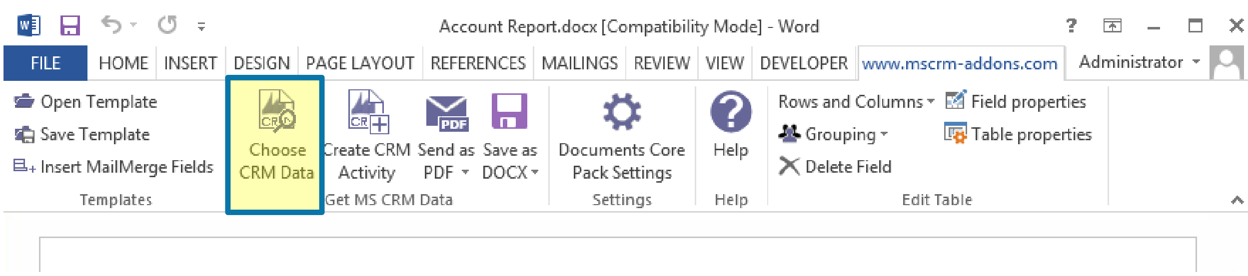


Figure 86: www.mscrm-addons.com tab - Choose CRM Data

5.2.3 Step 3: Search and Select a CRM record

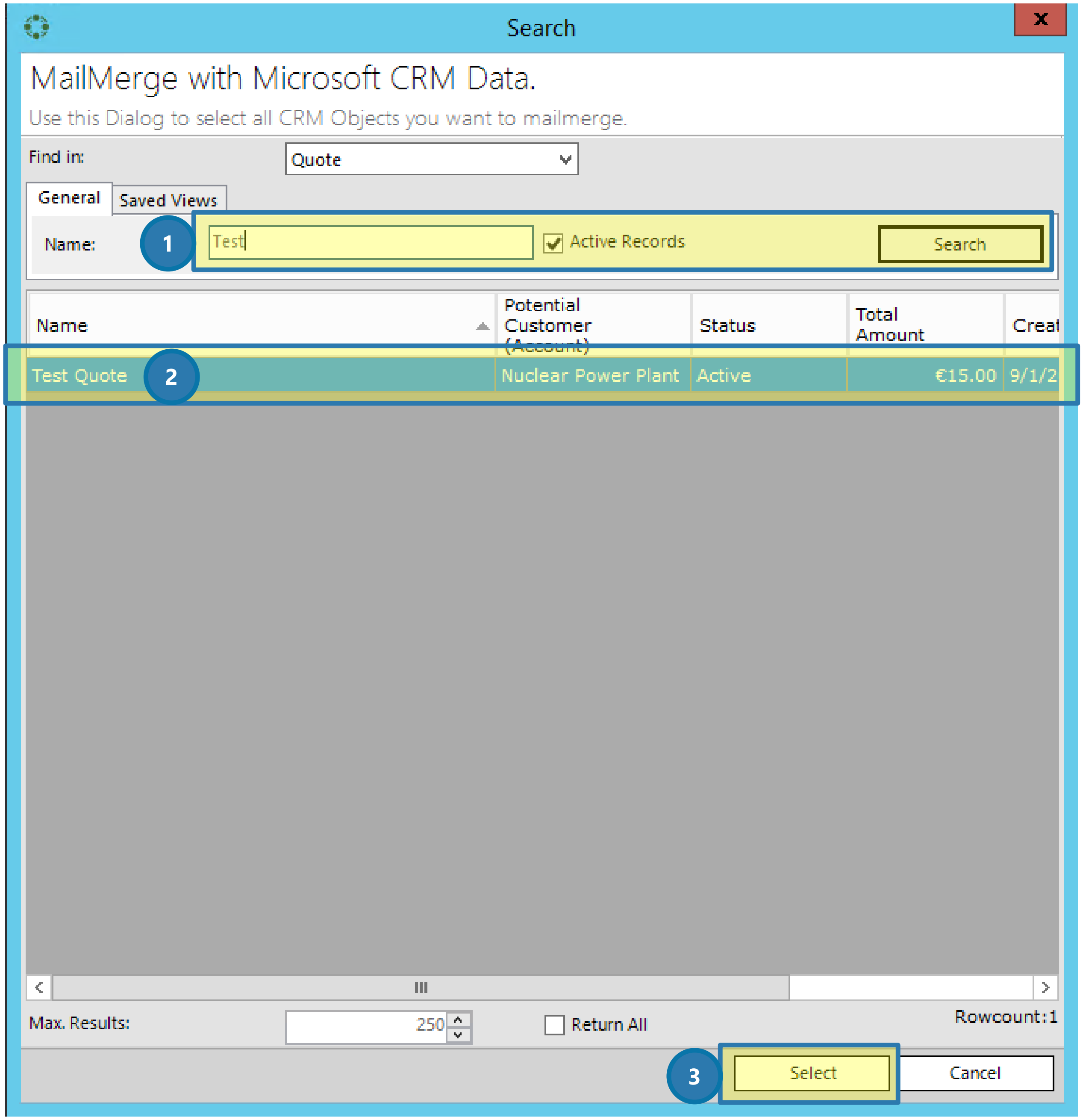


Figure 87: Choose CRM Data dialog with data

Enter a search term corresponding to the template you have created previously and hit the ***[Search]***-button (1). Select one of the records from the result windows 2 and press ***[Select]*** 3.

5.2.4 Step 4: Check you document

Now check your template and verify if your modification and design is as expected. Please be aware that some special settings may NOT take effect at this point! To ensure that every think works like expected, please also use the template in one complete work process.

5.3 How to pre filter result rows before generating a document

This functionality is helpful when the user needs to select a specific related entity (for example, “contact”) before starting to generate the document.

5.3.1 Open the *Configure Fields and Datasource* dialog

In order to do so, you have to open the additional tab, select a relationship and click on the ***[Edit]***-button. If have not worked with the additional tab yet, please SEE CHAPTER 1.7 ADDITIONAL-TAB, PAGE 35.

In the so opened *Configure Fields and Datasource* dialog (FOR MORE DETAILED INFORMATION SEE CHAPTER 1.8 ADDITIONAL RELATIONSHIPS, PAGE 38), go to the *Records to Show*-section.

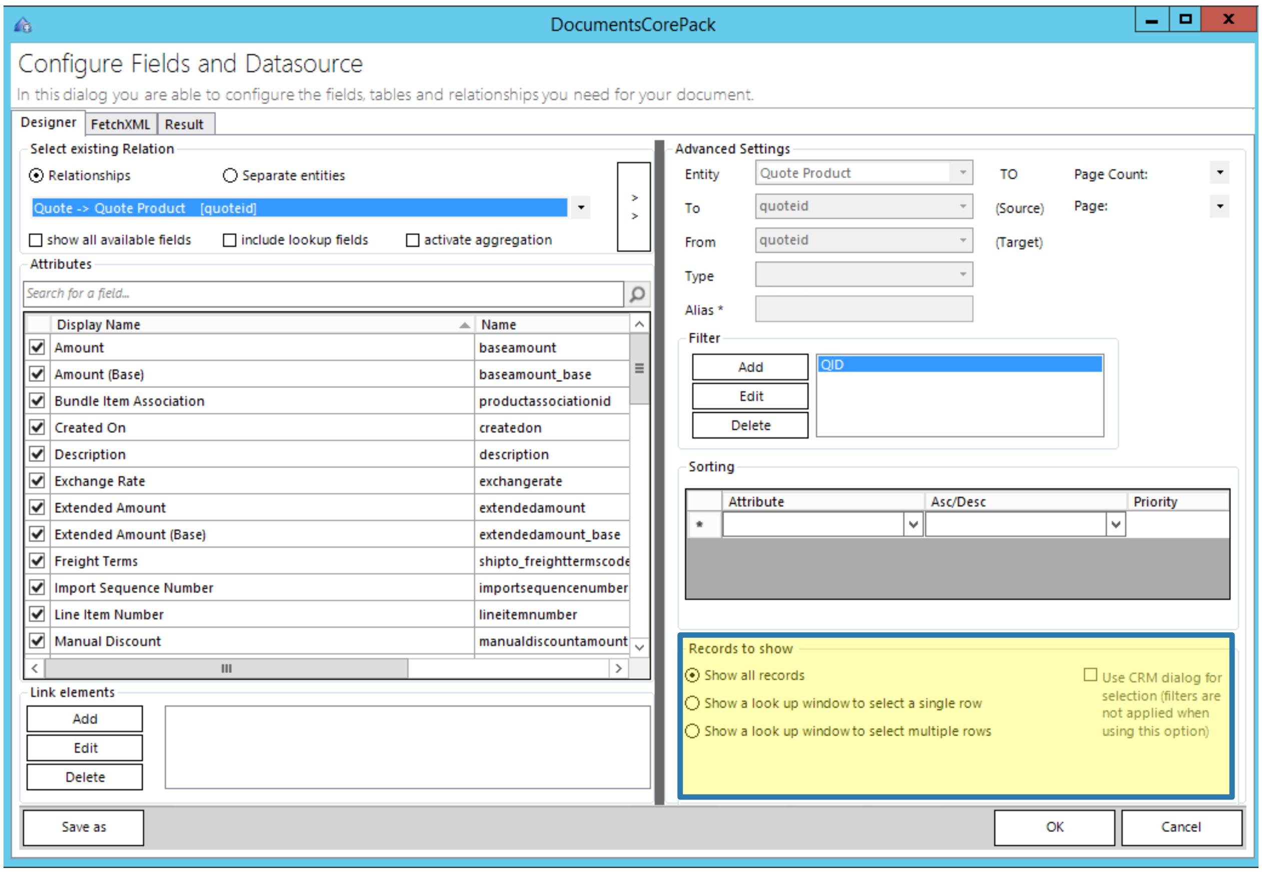


Figure 88: Configure fields and datasource-dialog – Records to show (default settings)

5.3.2 How to pre-filter rows in the *Records to show* – section

The *Records to show* – section you can choose if you want a selection and if so, which type.
You can choose between single or multiple rows. The "Width(px)"-section enables you to determine the order and the width of te columns in pixel within the lookup window.

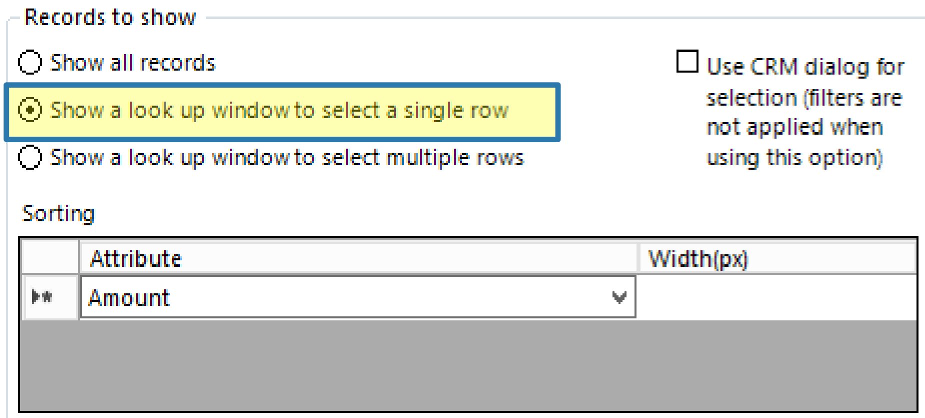


Figure 89: Records to show – Show a look up window to select a single row

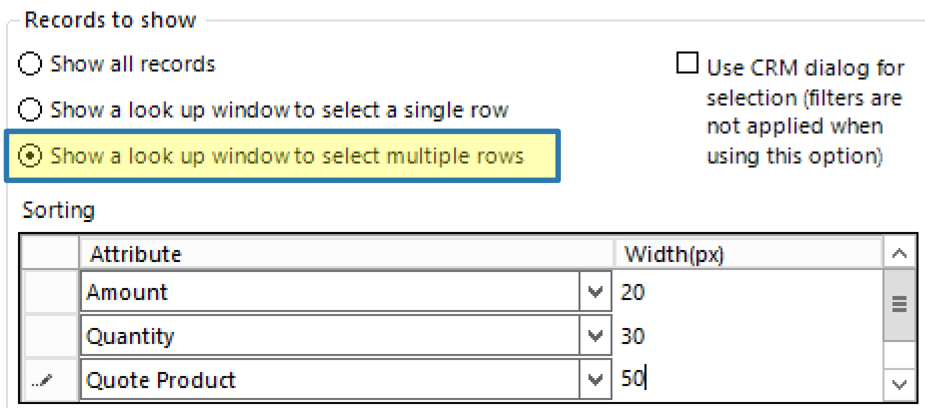


Figure 90: Records to show – Show a look up window to select multiple rows inclusive width(px)-settings

5.4 How to label templates

This "How to" describes how to create label templates with DocumentsCorePack Template Designer. Basically, there are two options how a label template can be created and merged:

A) By choosing various records at once
(in this case, each label equals one record form the main entity of the template)
B) By choosing one record and then, setting relations to other records
(in this case, each label equals one record from the predefined relationship)

This "How to" shows how to retrieve fields for version A), as well as for version B).

5.4.1 How to label templates choosing various records at once

In order to prepare for a new template, you have to open the Template Settings, then go to the *General*-section, check *Mark as label template* and click on the ***[OK]***-button. (SEE CHAPTER 1.5 ADVANCED TEMPLATES SETTINGS, PAGE 19 FOR MORE INFORMATION ON THE GENERAL TEMPLATE SETTINGS.) You will see, that now there is a new block in the *www.mscrm-addons.com* – tab of the command bar.

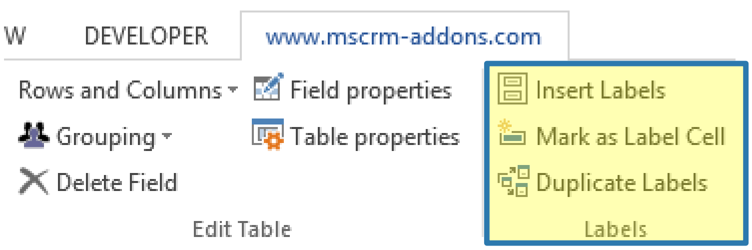


Figure 91: New "label block" in the www.mscrm-addons.com - tab.

5.4.2 Click on the ***[Insert Labels]*** – button

Within the window that opens now, you can customize the label options for your future template.

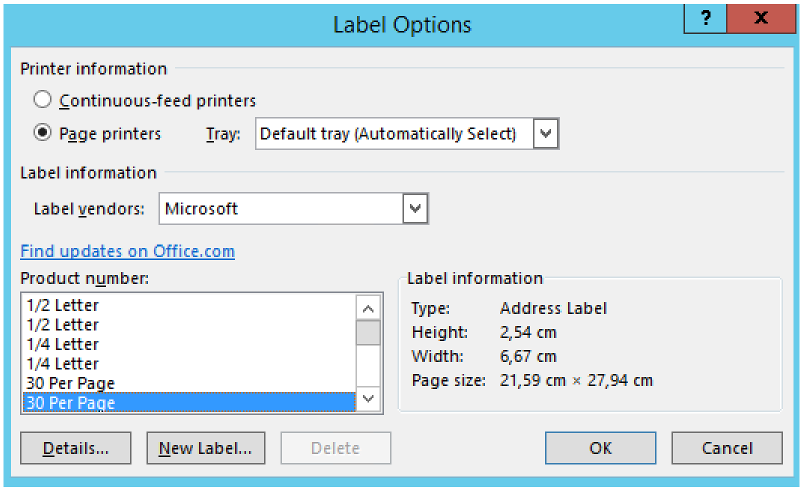


Figure 92: Label Options dialog

You can select between various trays, label vendors and the corresponding product numbers. In the label information section on the right side, you get additional information on the selected label. Select your desired label and click on the ***[OK]***-button.

5.4.3 Mark the first cell as label cell

Once the label is inserted in your document you have to mark the first cell as label cell. To do so, simply set the cursor in the first cell and click on the ***[Mark as Label Cell]***-button in the www.mscrm-addons.com – tab.

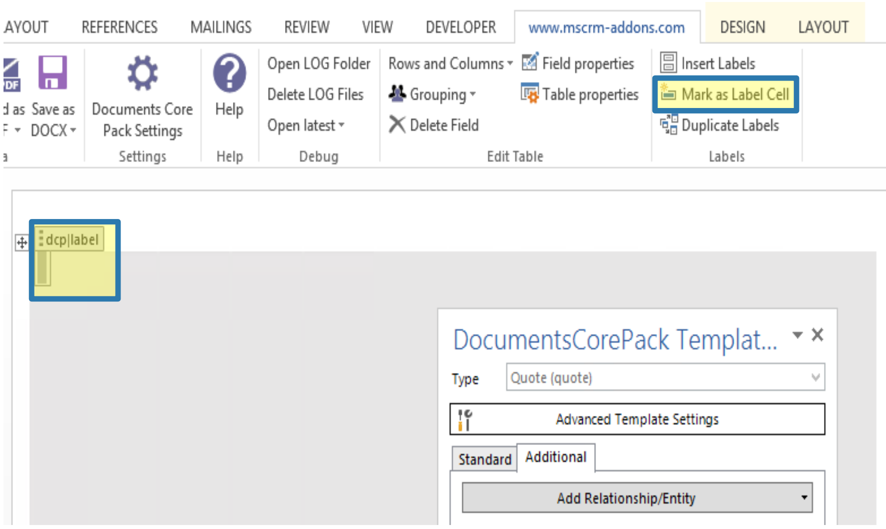


Figure 93: Mark cell as label cell (Please note that the cell is enlarged due to demonstration purpose)

5.4.4 Retrieve fields (version A): Select a start entity

Once the cell is marked as Label cell you must select a start entity (for example "Quote" and insert the appropriate fields. Once you have finished, please proceed with CHAPTER 5.4.6, PAGE 78.

Make sure that you use the *Standard-tab* only to insert the corresponding entities.

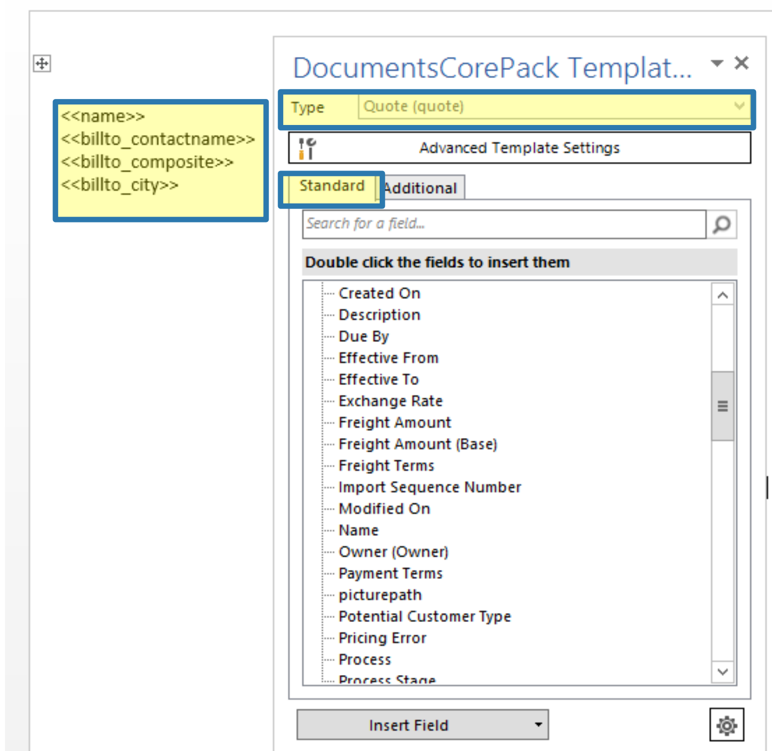


Figure 94: Mark cell as label cell (Please note that the cell is enlarged due to demonstration purpose)

5.4.5 Retrieve fields (version B): Create one record and set relations to other records

Once the cell is marked as Label cell you must build up a relation for your entity.

When working with version B it is crucial to insert the fields via the *Additional-tab* of the Template Designer. Once you have finished, please proceed with CHAPTER 5.4.6, PAGE 78.

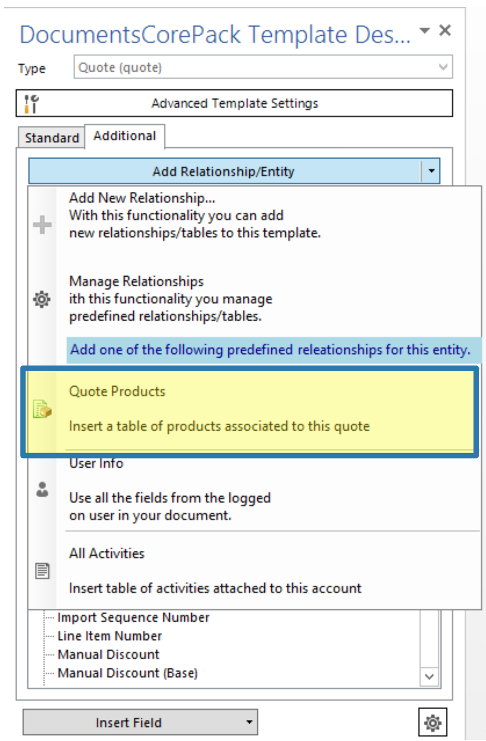


Figure 95: Additional tab: Add relationship/entity

To set a relation, simply open the Add Relationship/Entity drop down menu and select the relation you would like to insert (for example: Quote Products). For further information on how to set a relation and how to add new relationships/entities, please SEE CHAPTER 1.7.1 ADD RELATIONSHIPS/ENTITY, PAGE 36

Now the relation is set and you can, as well, select the fields from the corresponding table that has been created.

5.4.6 Define the remaining cells as label cells as well

Now you need to define the remaining cells as label cells as well. To do so, place your cursor in the first cell and click on the ***[Duplicate Labels]***-button in the *www.mscrm-addons.com* – tab.
The following dialog appears. Please click on the ***[Yes]***-button to continue:

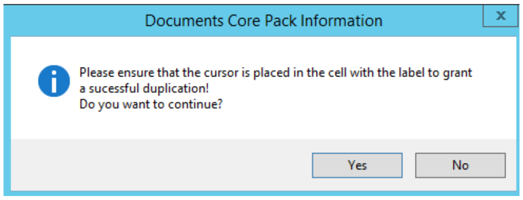


Figure 96: DocumentsCorePack Information dialog

Well done! Now, this is how a possible result could look like. Please do not forget to Save your template by clicking on the [Save template]-button in the *www.mscrm-addons.com* command bar.

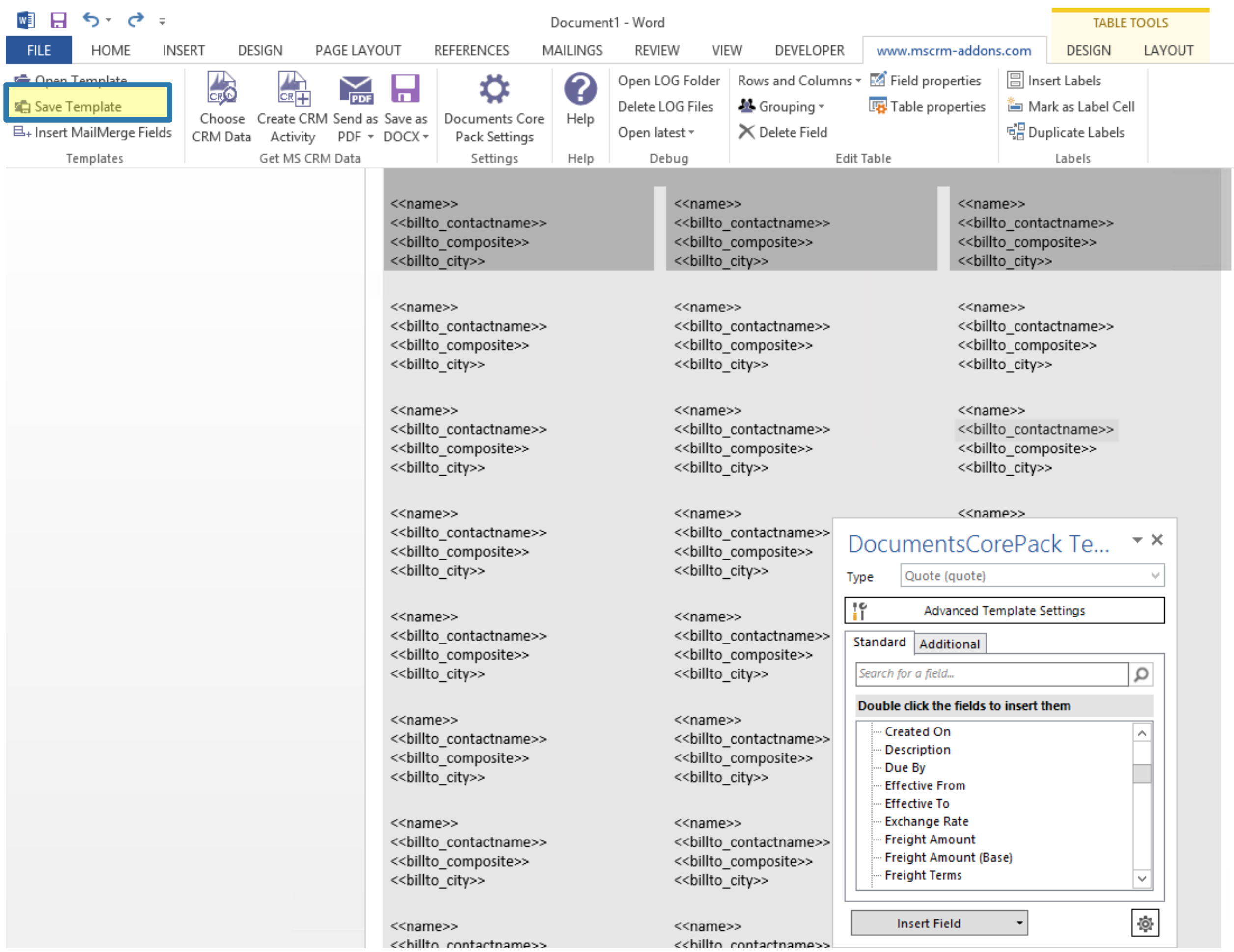


Figure 97: Result: Label templates based on various records at once

5.5 How to create a relation form scratch

[COMING SOON]

5.6 How to create a relation to a separate entity (no relation)

[COMING SOON]

5.7 How to create an aggregation fetch

[COMING SOON]

5.8 How to properly format an address block

This "How to" describes how to create and form an address block properly.

5.8.1 Create an address block with DocumentsCorePack Template Designer

In order to prepare an address block, you have to open the Template Designer, select your main entity and insert the fields you want to be displayed in the block. (SEE CHAPTER 1.4.3 HOW TO CREATE DOCUMENTSCOREPACK TEMPLATES, PAGE 64 FOR MORE INFORMATION ON HOW TO CREATE TEMPLATES AND INSERT FIELDS.)
If you have chosen for example "Account" and inserted all required fields, do not forget to save the template! A possible result could look like this:

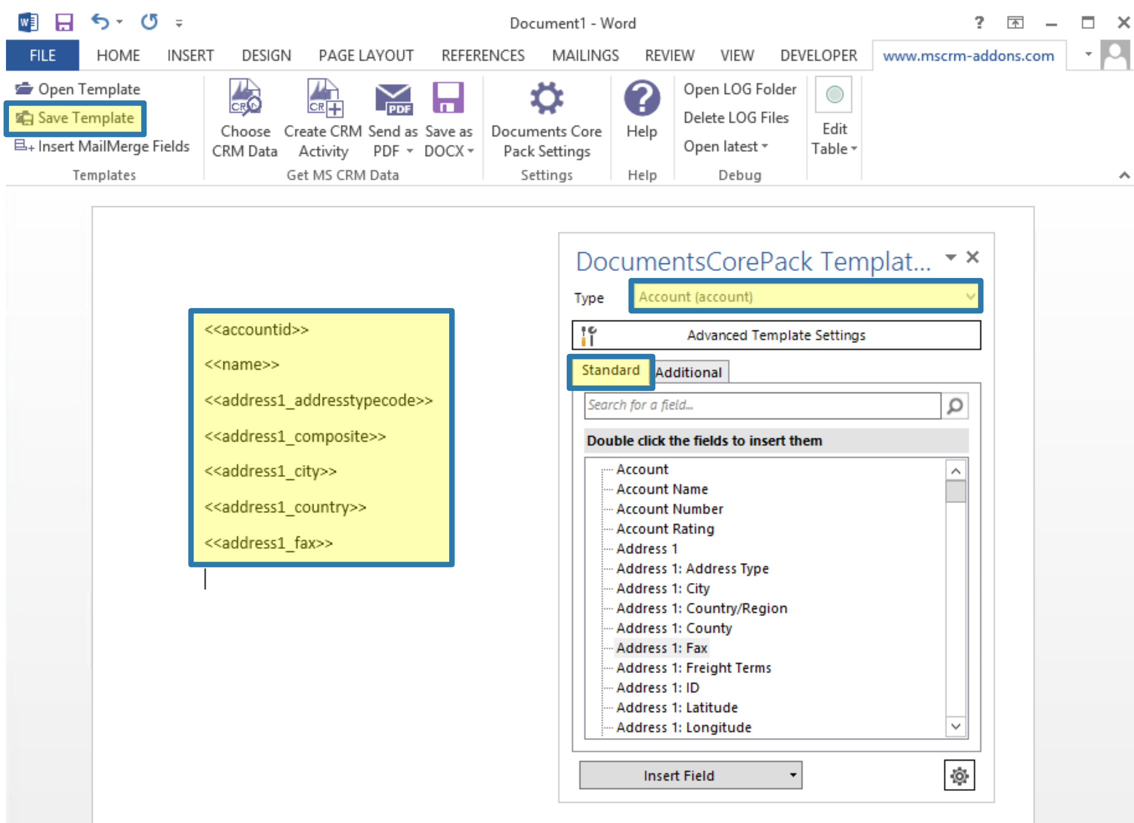


Figure 98: Example address block created with DocumentsCorePack Template Designer Standard-tab fields

5.8.2 Choose your CRM Data and get your results

Once your template is saved, click on the ***[Choose CRM Data]***-button. In the *Name* – field you can search for the account you want to insert. Select the appropriate record and click on the ***[Select]***-button in order to continue.

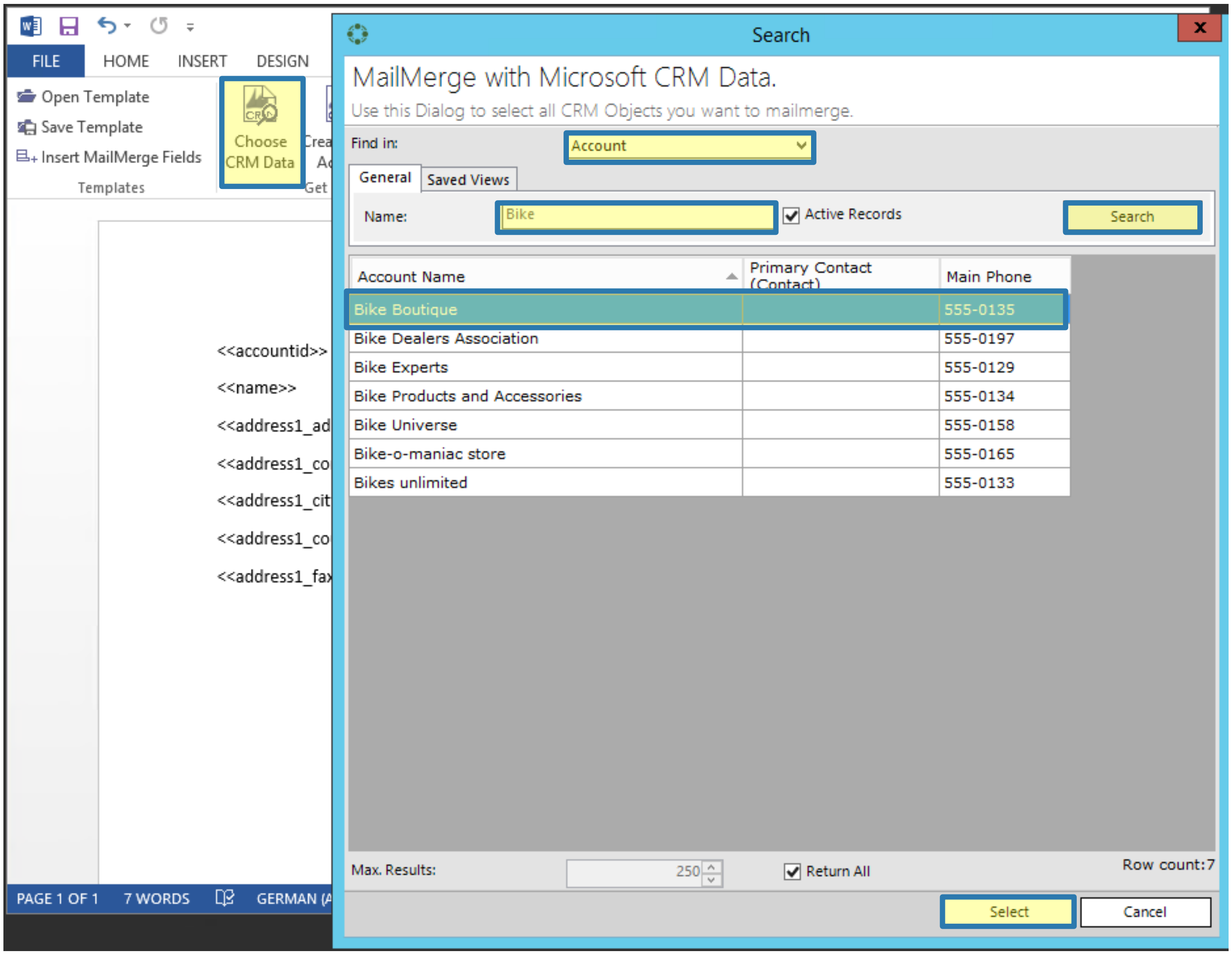


Figure 99: Choose CRM data from MailMerge with Microsoft CRM Data dialog.

If you check the *Active Records* – checkbox, only the active records will be displayed. If not, you will be provided with all records (no matter if inactive or not).

5.8.3 Merged document with missing data – troubleshooting

Now after we have merged our template, we got a rather dissatisfying result, which is shown in Figure 93. On the right side, you can see that there is lots of important data missing in the result. The reason therefore is, that the data is also missing in the source, say, it has never been saved in Microsoft Dynamics CRM properly. That is why DocumentsCorePack cannot merge it. Now, how do we solve this issue?

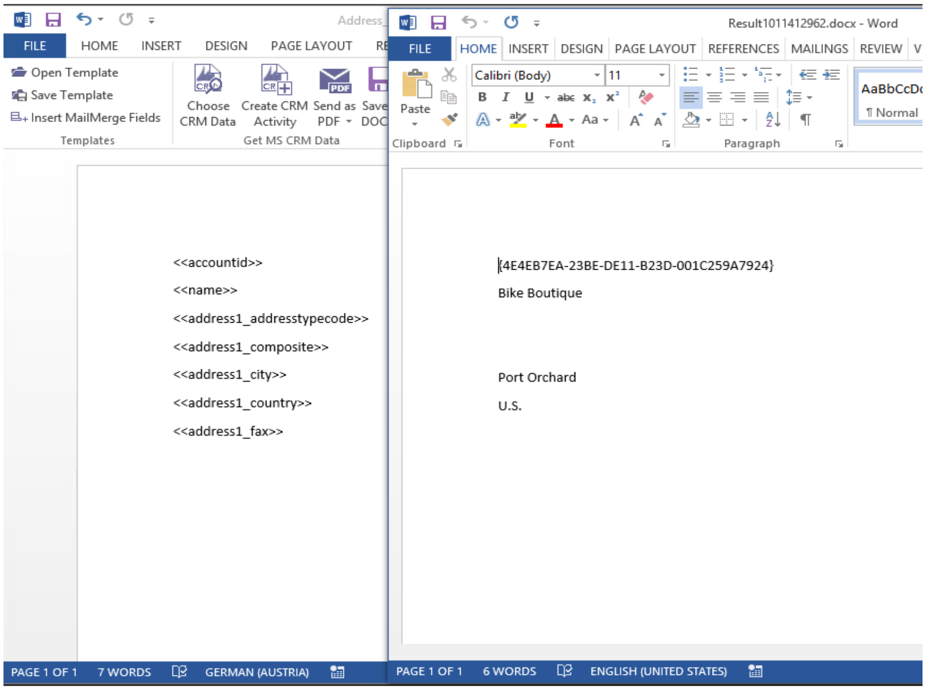


Figure 100: Template (left) vs Merged address block with missing information (right)

5.8.4 How to format an address block with missing data properly?

To format an address block, simply click in one of the fields you want to format and click on ***[Field properties]*** in the *www.mscrm-addons.com* – tab and the *String Properties dialog* will open. For further information on Field properties, please SEE CHAPTER 1.10 FIELD PROPERTIES, PAGE 52.

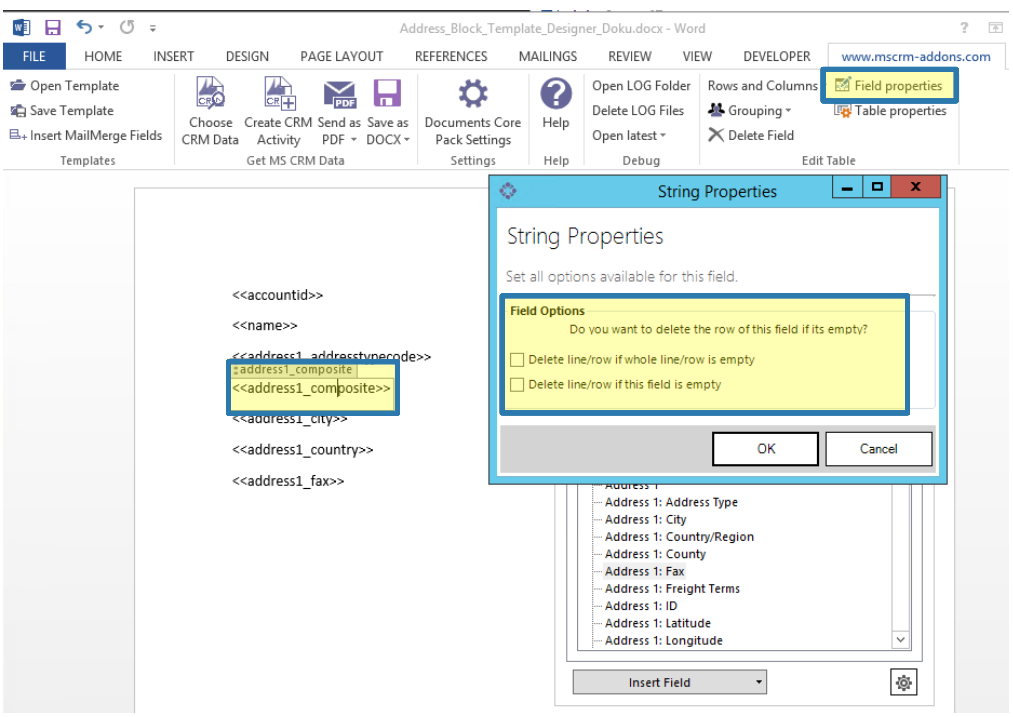


Figure 101: String properties dialog with template in the background

The String Property dialog provides you with two options on how to proceed with empty lines:

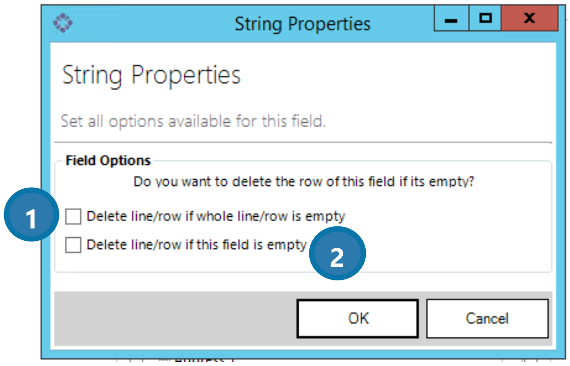


Figure 102: String properties dialog

❶ Activating this checkbox will delete the line/row if the whole line/row is empty after the merge process.

❷ Activating this checkbox will delete the line/row if the selected field is empty. If you, for example, select the field <<address1_postalcode>> and activate this checkbox, the line will be deleted if there was no data stored in the postalcode-field in CRM. No matter if there was data information in the field address1 or or not.

All characters like hyphens, colons, commas, as well as words or additional text are also counted as signs and therefore the whole line will not be deleted. Should you stumble over such a case, simply check checkbox ❷.

5.9 How to Insert as Picture Field

Before you can insert a field as a picture field, you have to save at least one picture in your CRM.
Pictures can be saved as *entity image* (e.g. with "Contact" or "Account") or as a *note*.
Once saved, pictures will be embedded into the future document as base 64 image.

Select this option if you know, that the document's recipient has a bad or no internet connection. Do not choose this option if you want to send a document with a lot of images. (In this case rather use theHow TO INSERT AS PICTURE Link Field (PLEASE SEE AS WELL CHAPTER 1.9.2 INSERT AS A PICTURE-LINK FIELD, PAGE 42)

However, as soon as you have saved at least one picture, you can start.

5.9.1 How to insert a picture that has been saved as entity image previously

Open the DocumentsCorePack Template Designer and select the entity you would like to work with, for example *Contact*. Now look for *entity image* in the Standard Tab. The best way to do this is via the search. Learn more about the search functionality in chapter 1.4.4 SEARCH WITH THE ATTRIBUTES TREEVIEW, PAGE 16.
Once you have found the field *Entity Image*, simply click on it and then click on the *Insert Field Drop Down Menu*. There, select the option Insert *'Entity Image' as Picture Field*. As soon as you have done so, a placeholder will be displayed in your document. Once merged, the picture will be visible instead.

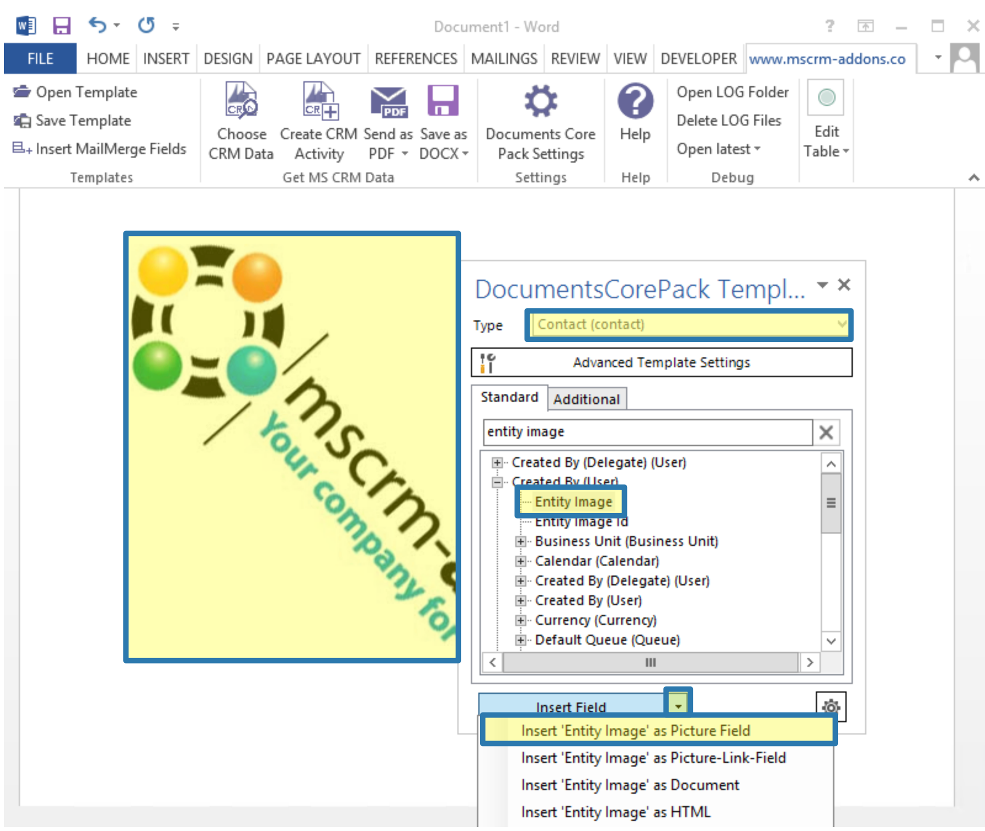


Figure 103 Insert 'Entity Image' as Picture Field

5.9.2 How to insert a picture that has been saved as a note

Open the DocumentsCorePack Template Designer and select the entity you would like to work with, for example *Contact*. Now open the Additional Tab and click on the ***[Add Relationship/Entity]*** – button. (SEE CHAPTER 1.7.1 ADD RELATIONSHIPS/ENTITY, PAGE 36 FOR FURTHER INFORMATION).

Within the *Configure fields and data source – window*, set up a relation between your entity and the location where you have saved your picture previously. To do so, select, for example, Contact -> Note in the Relationship dropdown – menu. Then look for Note in the attributes' section and mark the field. Press the ***[OK]***-button to proceed.

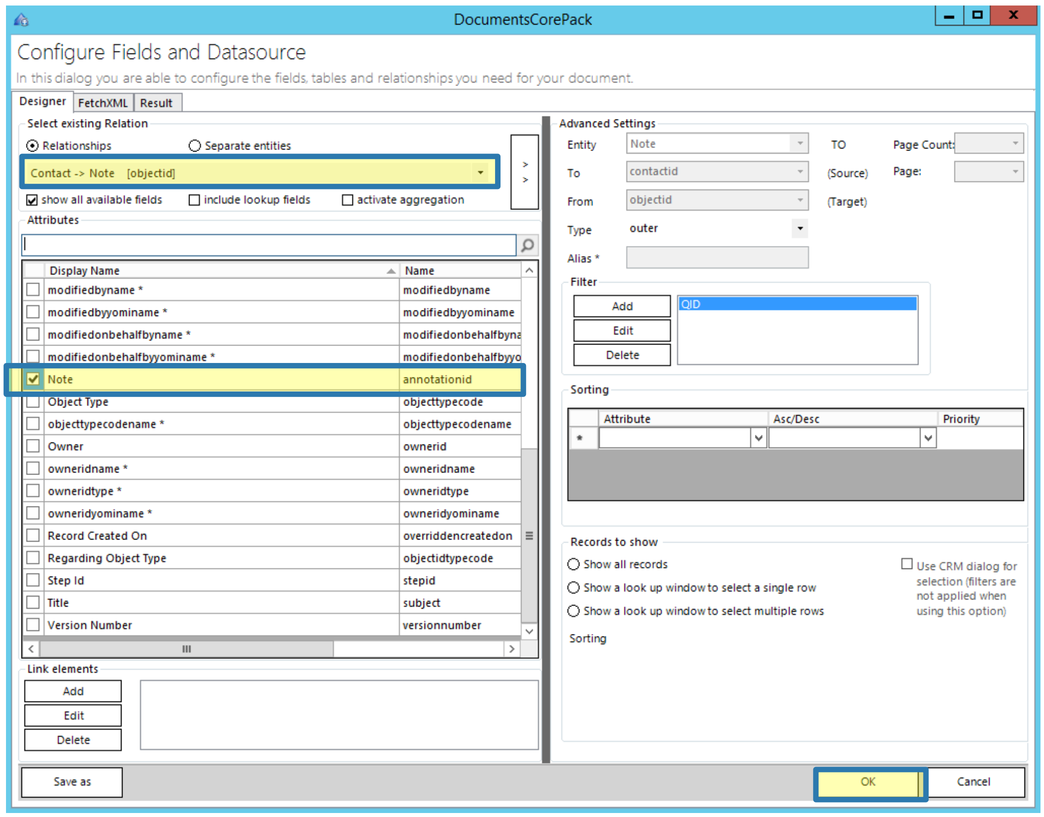


Figure 104 Configure Fields and data source – set up relation between entity and note

Your previously created Contact <> Note relationship is now to be seen in the DocumentsCorePack Template Designer Additional tab as a table. Click on the location in your template where you would like to insert the picture, then click on *Note* and on *Insert 'Note' as Picture Field*.

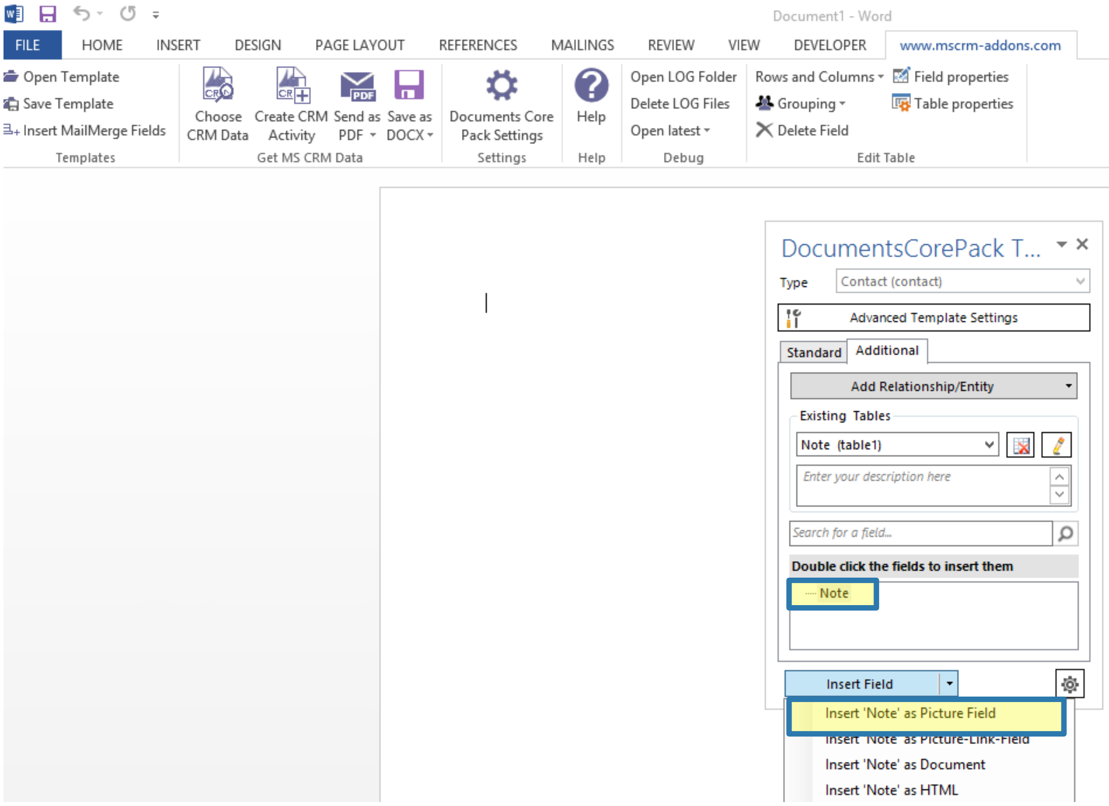


Figure 105 Additional Tab – Contact <> Note relationship

The next dialog allows you to decide whether you want to insert the newly generated relation field as a table or not. We decided not to do so in our example (that is why we marked the option *Insert the field from the first related record without a table*, but you could as well customize the picture as a table. SEE CHAPTER 5.1.4 STEP 3: INSERT THE TABLE, PAGE 67 for more information on how to format a table. However, click on the ***[OK]***-button in order to proceed.

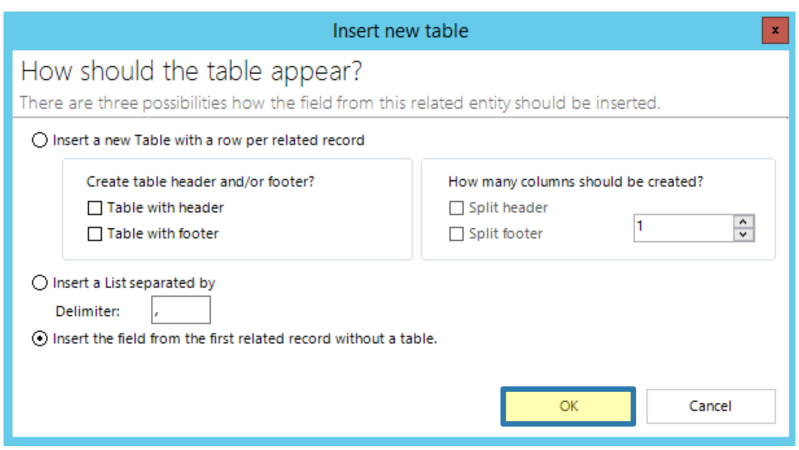


Figure 106 Insert as picture field – insert new table dialog

That's it! You are provided with a beautiful placeholder, which will be replaced by the picture in the future document.

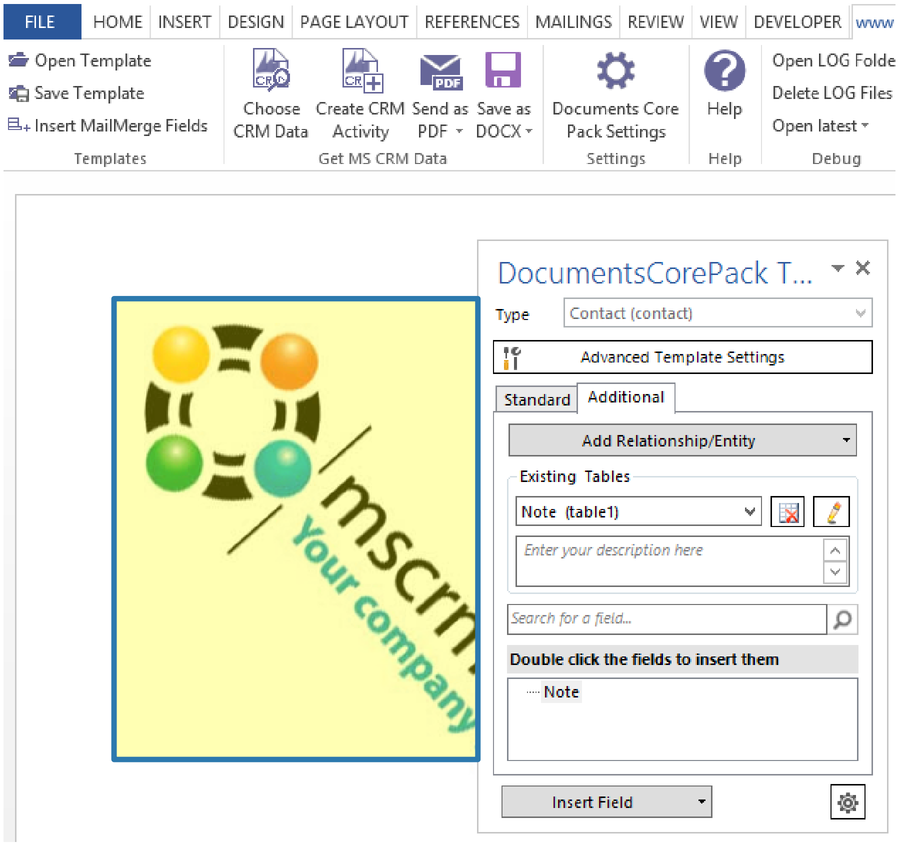


Figure 107: Insert as picture field – Placeholder

5.10 How to Insert as Picture Link Field

Before you can insert a field as a picture-link-field, you have to save at least one link to a certain picture in a random text-field in your CRM.

Select this option if you want to create a document that will contain lots of pictures. Due to the functionality of this *insert as*-option, the documents' size will be smaller than the size of a document that had its pictures directly inserted. This option is also very useful if you use pictures in your document that are subject to seasonal changes. Do not use this option if you know that the recipient has a bad or no internet connection (In this case rather use the INSERT AS PICTURE FIELD OPTION – SEE CHAPTER 1.9.1 INSERT AS PICTURE FIELD PAGE 41.)

However, as soon as you have saved at least one picture-link, you can start.

5.10.1 How to insert a picture that has been saved as picture-link previously

We have saved our picture-link in the description-field previously in Microsoft Dynamics CRM. You can save your picture-link in any available text-field in your CRM. However, please do not forget to save your changes.

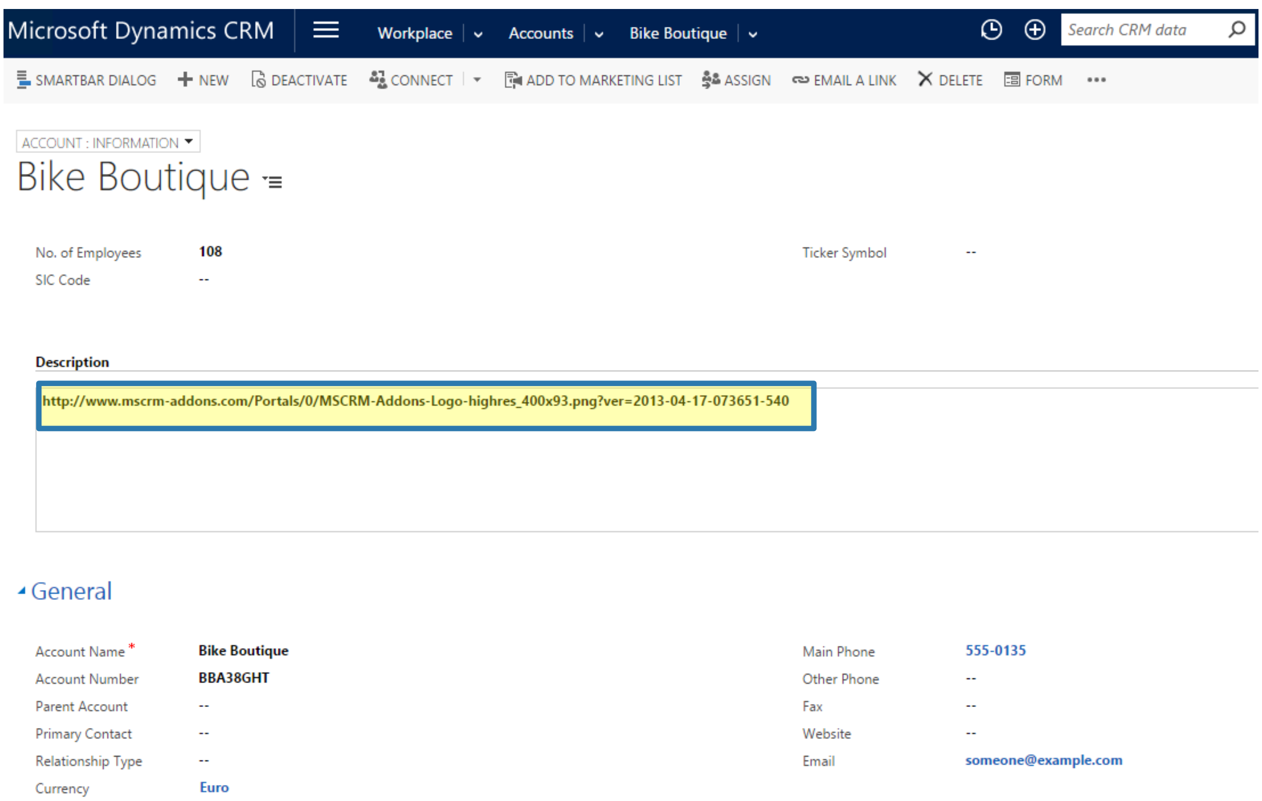


Figure 108: Add link as picture link to the description field

Once you have created such a save-location, open the DocumentsCorePack Template Designer and select the entity you would like to work with. We use the entity *Account* and the field *Description* in this example.

Now look for the field in which you have saved the picture link previously in the Standard Tab. The best way to do this is via the search. Learn more about the search functionality in chapter 1.4.4 SEARCH WITH THE ATTRIBUTES TREEVIEW, PAGE 16.

Click on the location in your template where you would like to insert the picture, then click on *Description* and on *Insert 'Description' as Picture-Link-Field*. (At least, that is what we do in our example – if you have saved your picture-link in another location, you must enter the corresponding field.)

That's it! You are provided with a beautiful placeholder, which will be replaced by the picture in the future document.

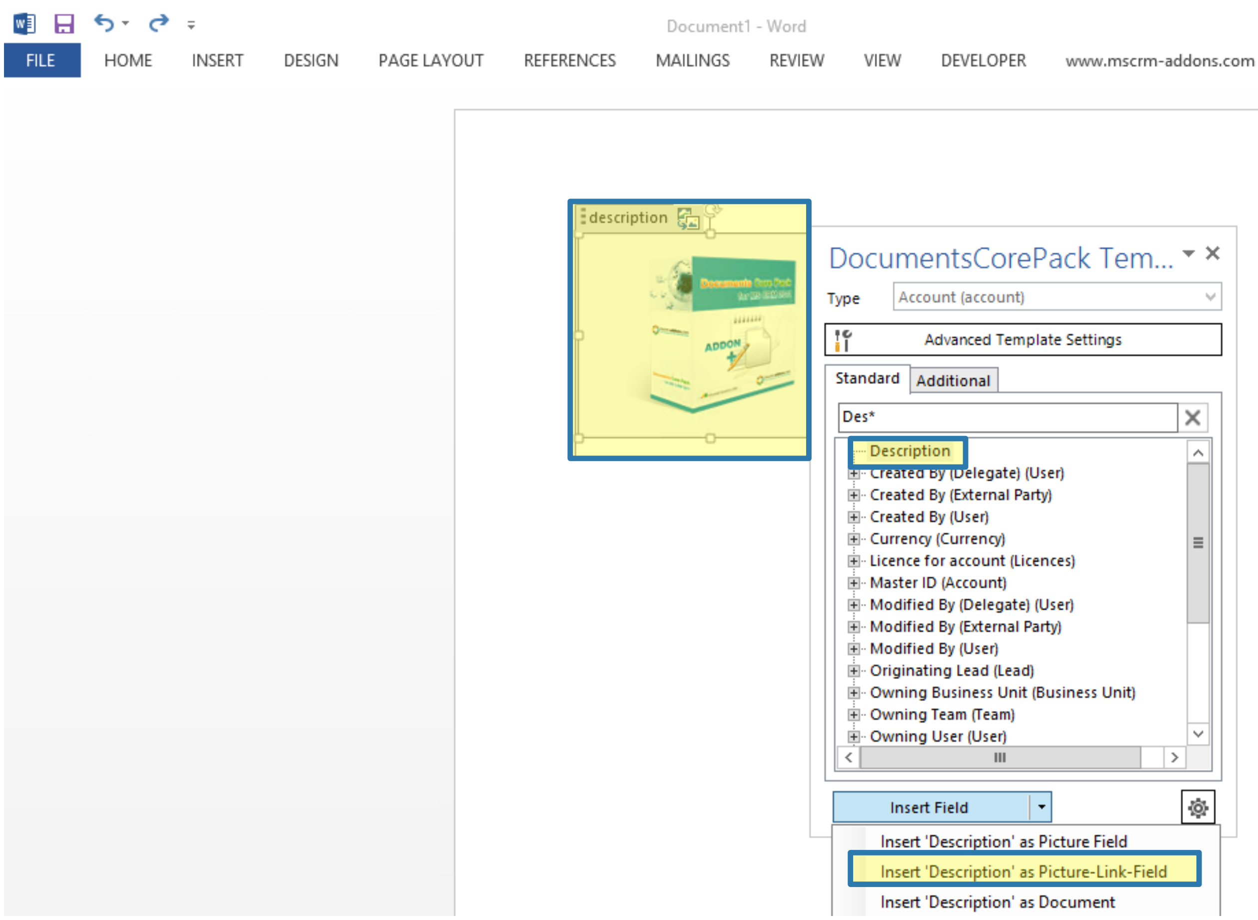


Figure 109: Insert the description-field as picture-link-field

5.11 How to insert as document

Before you can insert a field as document, you have to save at least document as a note in your CRM.

This option can only be executed in the Additional tab. For further information about the additional tab, please have a look at CHAPTER 1.7 ADDITIONAL-TAB ON PAGE 35.

Once you have saved a document as a note in your CRM, you can proceed.

5.11.1 Set up a relationship between your entity and the documents' save location

Open the DocumentsCorePack Template Designer and select the entity you would like to work with, for example *Account*. Now open the Additional Tab and click on the ***[Add Relationship/Entity]*** – button.
(SEE CHAPTER 1.7.1 ADD RELATIONSHIPS/ENTITY, PAGE 36 FOR FURTHER INFORMATION).

Within the *Configure fields and data source – window*, set up a relation between your entity and the location where you have saved your document previously. To do so, select, for example, Account -> Note in the Relationship dropdown – menu. Then look for Note in the attributes' section and mark the field. Press the ***[OK]***-button to proceed. (In chapter 5.9.2 HOW TO INSERT A PICTURE THAT HAS BEEN SAVED AS A NOTE PAGE 84, we provide you with an example on how to resolve such a relationship correctly.)

5.11.2 Insert as document

As soon as you have created your note, click on *Insert 'Note' as document* in the Additional Tab.

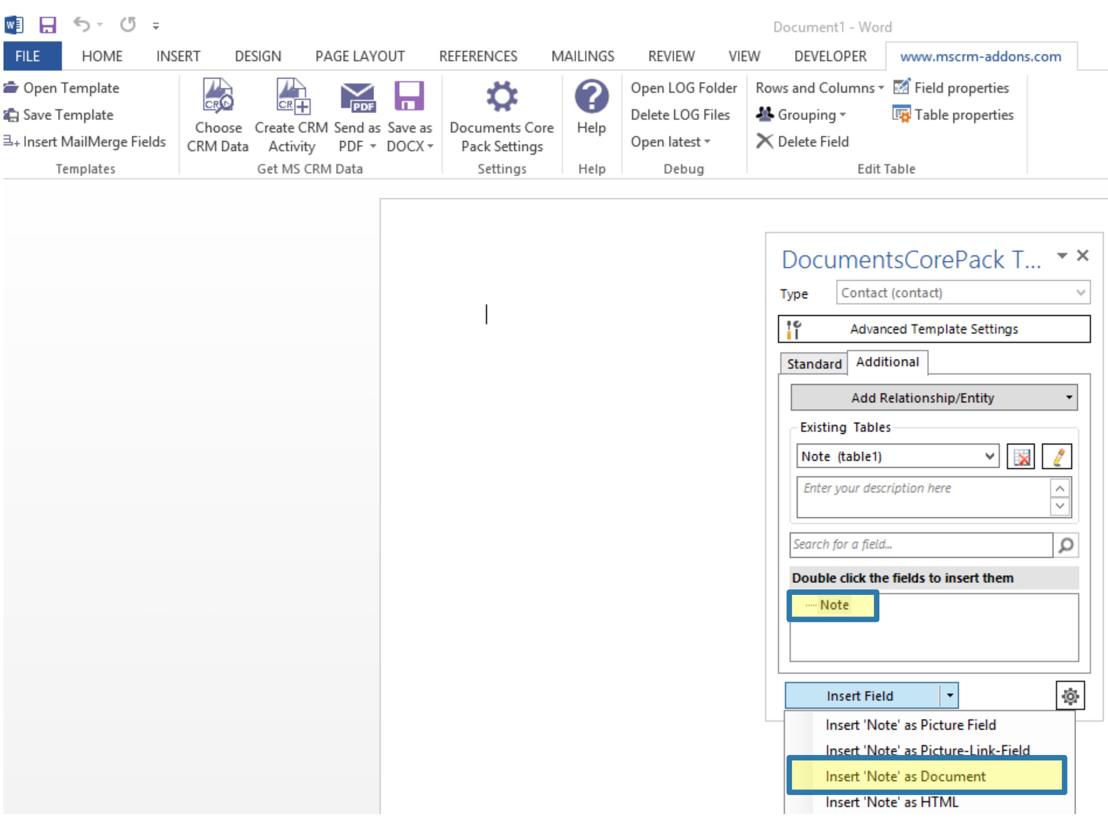


Figure 110: Additional Tab – Contact <> Note relationship – Insert as Document

You will be asked to select a source field for your embedded document. In our example there is only one possible source field (Note) because we have only saved one document. But if you had saved more than one document, we could have selected our field source in this field. Click on the ***[OK]***-button in order to proceed.

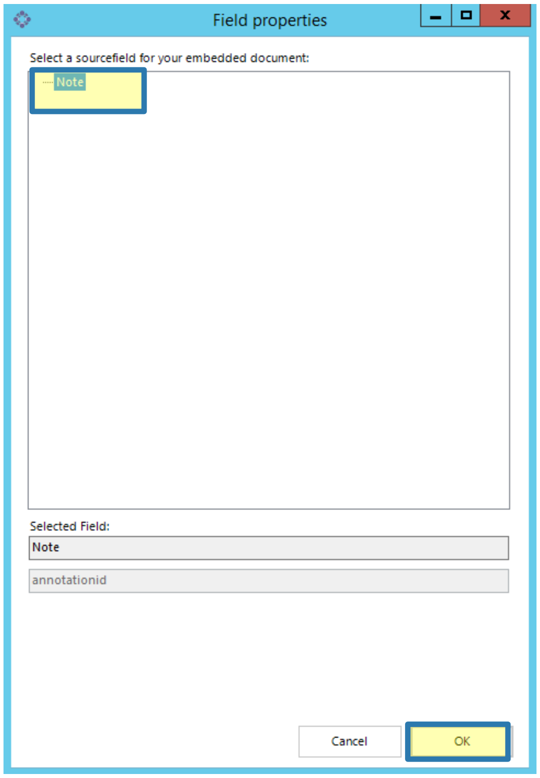


Figure 111: Field properties – insert note as source field

The next dialog allows you to decide whether you want to insert the newly generated relation field as a table or not. We decided to do so in our example (that is why we marked the option *Insert a new Table with a row per related record*, but you could as well use another option. SEE CHAPTER 5.1.4 STEP 3: INSERT THE TABLE, PAGE 67 for more information on how to format a table. However, click on the ***[OK]***-button in order to proceed.

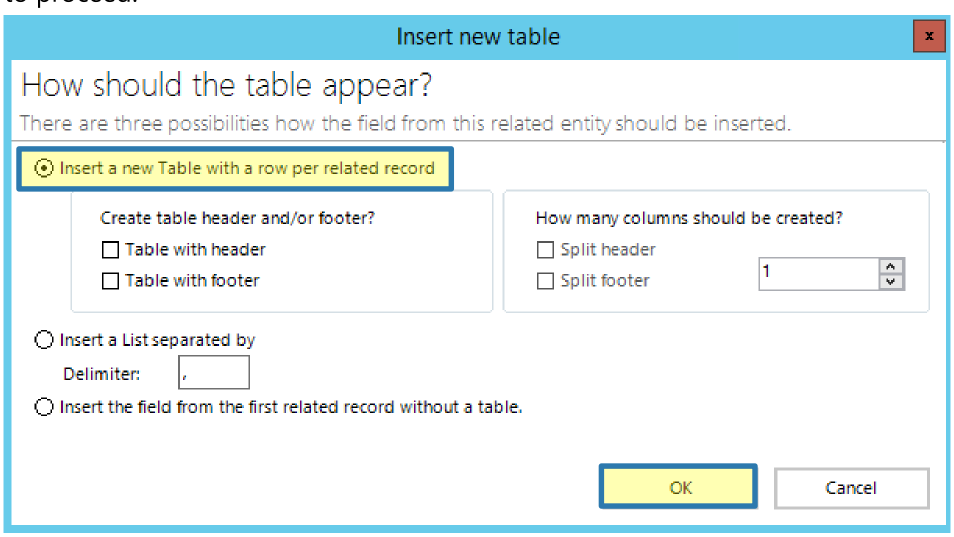


Figure 112: Insert document: Insert document as table or not?

That's it! You are provided with a placeholder and a table.

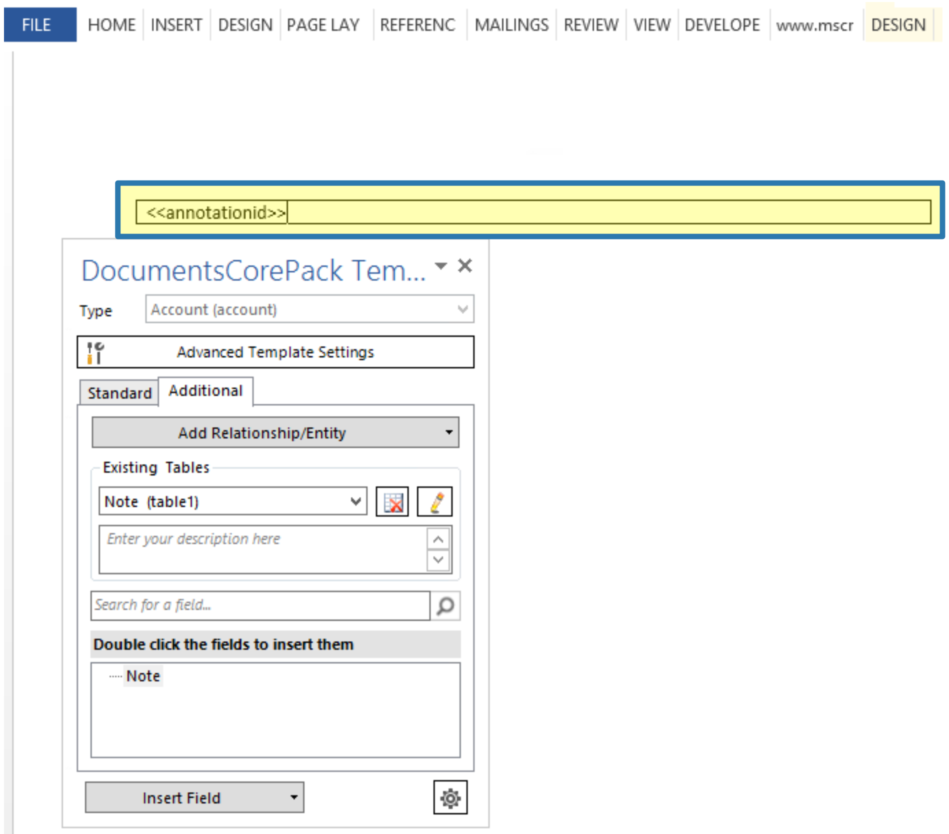


Figure 113: Insert document – placeholder

5.12 How to Insert as HTML

Before you can insert a field as HTML, you have to save the HTML code in your CRM.

CRM offers a field that is called 'HTML' description. You must save the HTML-code there.

Open the DocumentsCorePack Template Designer and select the entity you would like to work with, for example *Account*. Now look for *HTML-description* in the Standard Tab. The best way to do this is via the search. Learn more about the search functionality in chapter 1.4.4 Search with the attributes TreeView, page 16.

Once you have found the field *HTML-description*, simply click on it and then click on the *Insert Field Drop Down Menu*. There, select the option Insert *'HTML_description' as HTML*. As soon as you have done so, a placeholder will be displayed in your document.

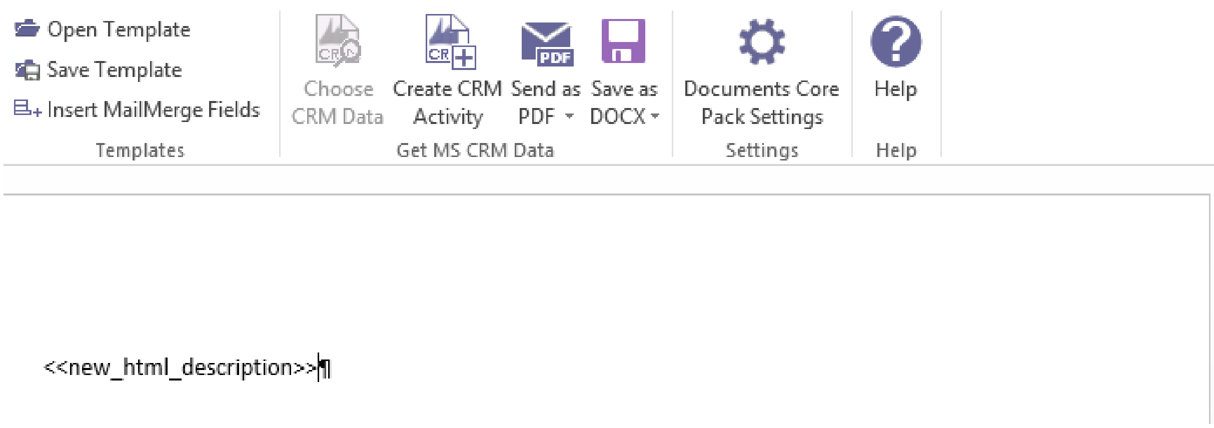


Figure 114: Insert HTML_description as HTML field

5.13 How to insert as static item

Insert Static Item contains the following submenus:

Static Document (SEE 5.14 HOW TO INSERT AS STATIC DOCUMENT)
Page Break (SEE 5.15 HOW TO INSERT PAGE BREAK)
Remove Empty Lines (SEE 5.16 HOW TO INSERT REMOVE EMPTY LINES)
Join Tables (SEE 5.17 HOW TO INSERT JOIN TABLES)

5.14 How to insert as static document

Before you can insert a field as static document, make sure that you have saved some documents before.

5.14.1 Use the *Insert static document* option

Select a type in the type selector of the standard tab, press *insert field*, hit *insert static document* and select *static document*.

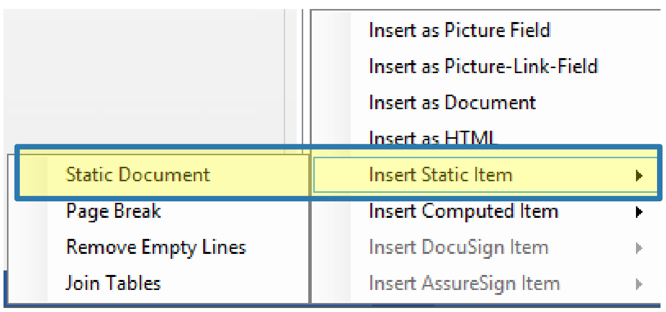


Figure 115: Insert static item drop down menu

5.14.2 Select a document to insert

At this point you have two options: You can either select a sub template and provide the necessary field as a merge parameter or you can skip this step and select a static document only (which does not require parameters for merging).

OPTIONAL: Provide a merge parameter

Select an ID-field from the *TreeView* (for example Contact) and check the *Provide the selected field as parameter*-checkbox.

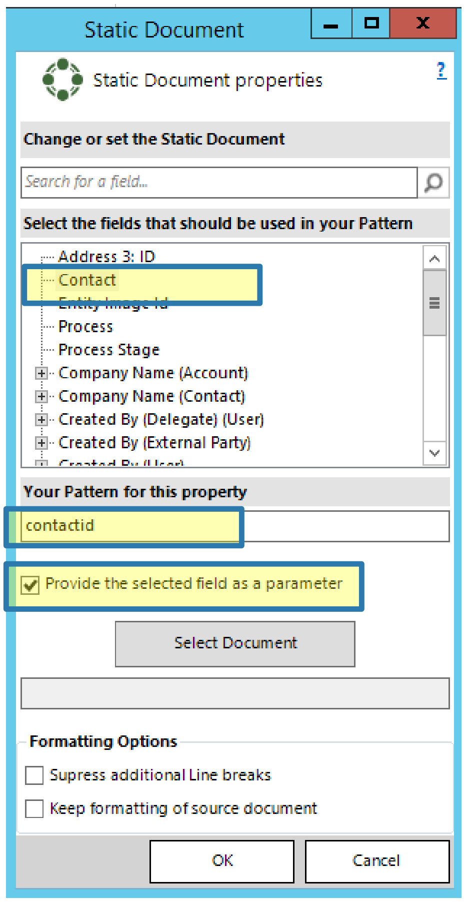


Figure 116: Static document properties – provide a parameter

If you do not want to provide the selected field as parameter, simply hit the ***[Select Document]***-button and select a sub template or a static document in the Look Up Record that opens afterwards.

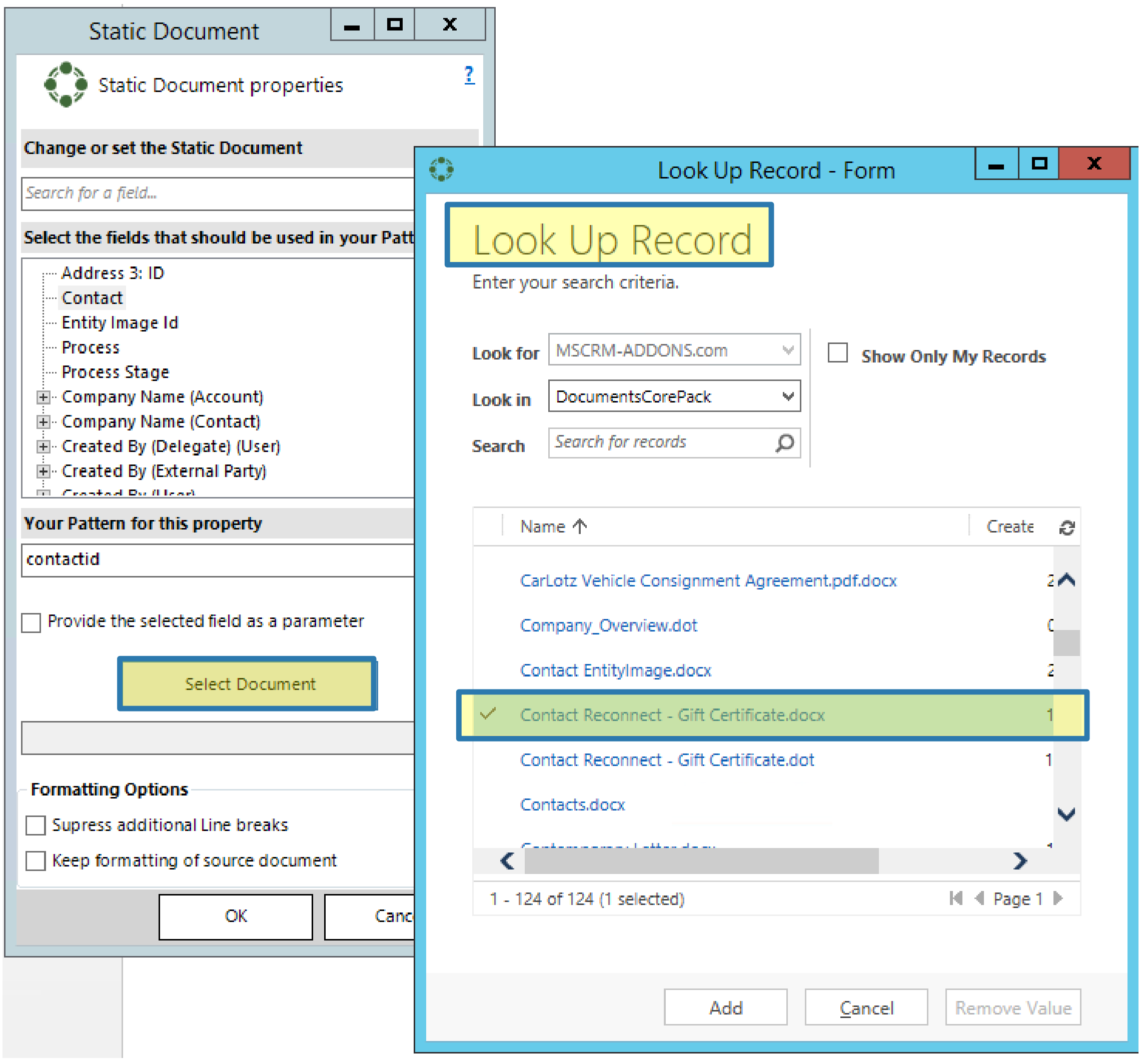


Figure 117: Click [Select Document] and a Look Up Record Dialog will open

5.14.3 Get the results

The name of the selected template is now to be seen in the new window. Click the ***[OK]***-button to apply the new window. To ensure that your future document has the desired formatting, the static document dialog provides you with two formatting options:

a) Suppress additional Line breaks (unnecessarily set line breaks will be suppressed)
b) Keep formatting of source document (the source documents' formatting will be kept)

Make sure that you check the corresponding checkbox next to the formatting options in order to execute it on the future document.

Now – that's it!

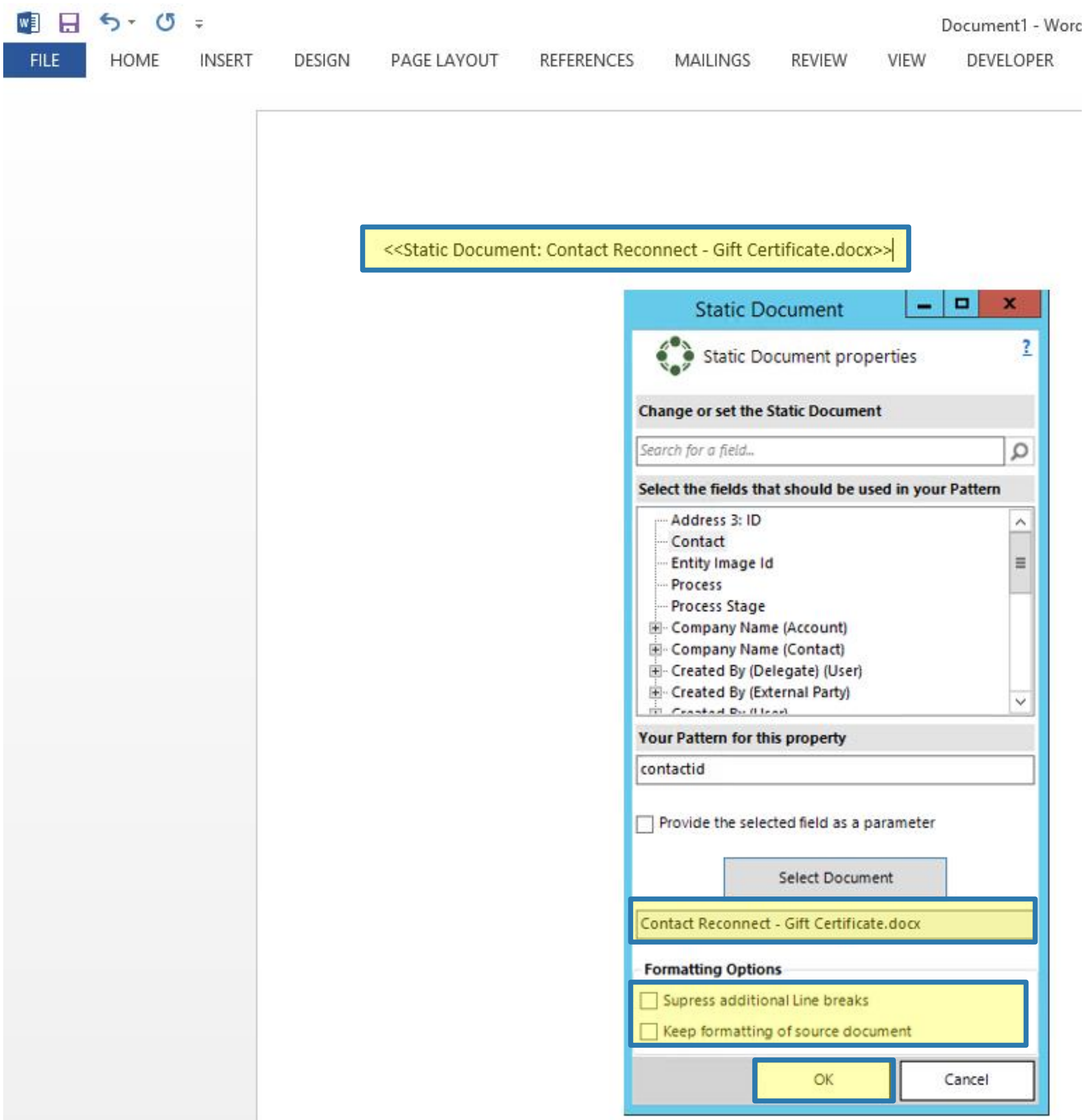


Figure 118: Insert static document dialog with result in the background

5.15 How to insert Page Break

In order to use this functionality to its full extends, you need to open an existing template or to create a new one.

5.15.1 Select the Page Break option in the insert fields drop down menu

Please place your cursor where you want to have the page break. Now click on Page Break in the insert fields drop down menu and that's it! A placeholder is displayed until you merge the document.

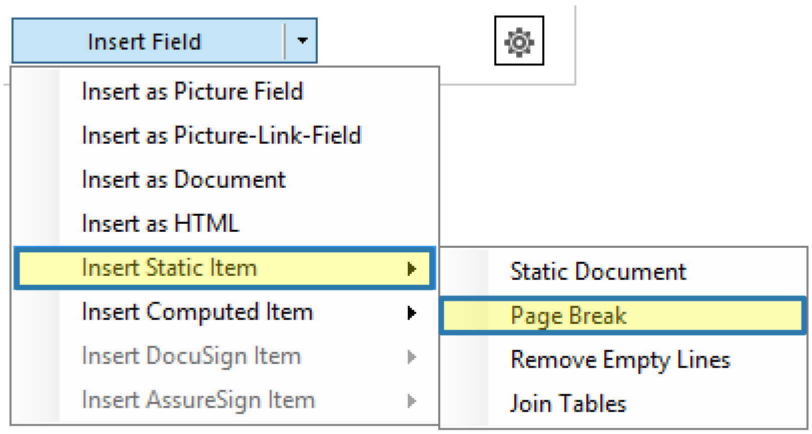


Figure 119: Select Page Break in the insert fields drop down menu

5.16 How to insert Remove Empty Lines

In order to use this functionality to its full extends, you need to open an existing template or to create a new one.

5.16.1 Select the Remove Empty Lines option in the insert fields drop down menu

Please place your cursor where you want to have the empty lines removed. Now click on *Remove Empty Lines* in the *insert fields drop down menu* and that's it! A placeholder is displayed until you merge the document. As a result, every empty line is deleted and the document is structured in a proper way.

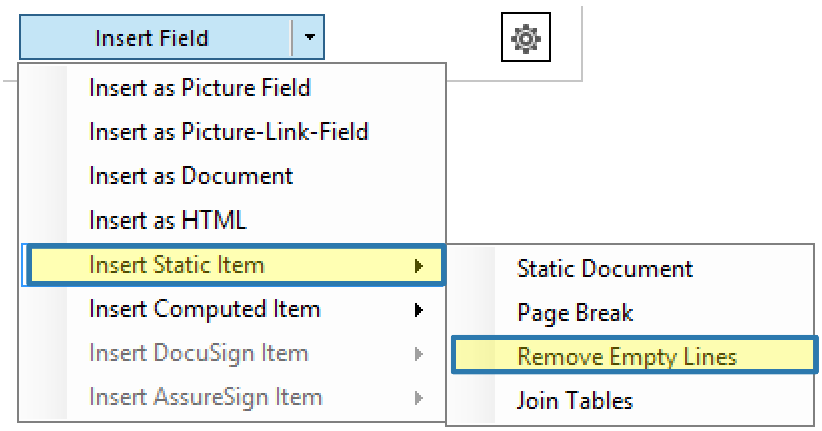


Figure 120: Select Remove Empty Lines in the insert fields drop down menu

5.17 How to insert Join tables

In order to use this functionality to its full extends, you need to open an existing template or to create a new one that includes a table.

5.17.1 Select the Join tables option in the insert fields drop down menu

Please place your cursor where you want to have tables joined. Now click on *Join tables* in the *insert fields drop down menu* and that's it! A placeholder is displayed until you merge the document. As a result, tables are joined and structured in a proper way.

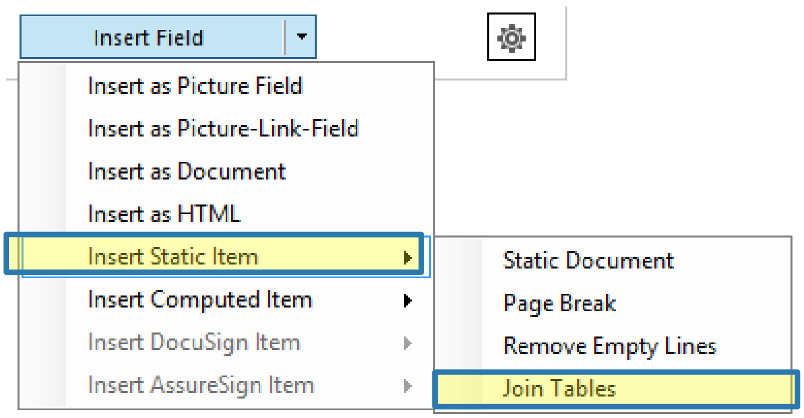


Figure 121: Select Join Tables in the insert fields drop down menu

5.18 How to insert computed items

“Insert Computed Item contains the following submenus:

QR Code (See chapter 5.19 How to insert QR Codes page 101)
Advanced String (See chapter 5.20 How to insert an Advanced String page 103)
Calculated Field (See chapter 5.21 How to insert Calculated Fields page 105)
Hyperlink (See chapter 5.22 How to insert Hyperlink page 107)

It is crucial that the used CRM-fields contain numbers!

5.19 How to insert QR Codes

The following description will show you how to insert QR Codes properly.

5.19.1 Use the Insert computed item option

Press *insert field*, hit *insert computed item* and select *QR Code.*

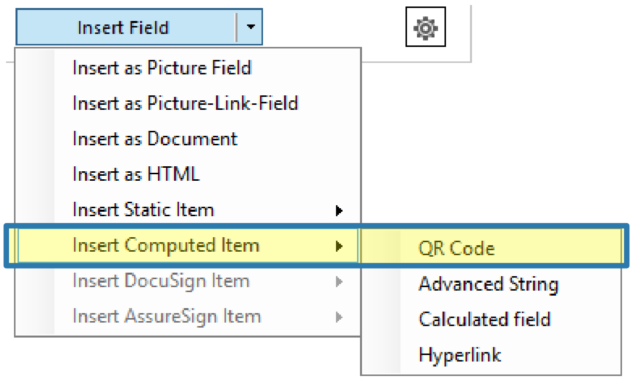


Figure 122: Select QR Code in the Insert Field section

5.19.2 Create a QR code

Define your QR code pattern. The used text will be transformed into a QR-code. The syntax for this field is described in chapter 3.1 DOCUMENTSCOREPACK CLIENT PROPERTY SYNTAX, PAGE 58.

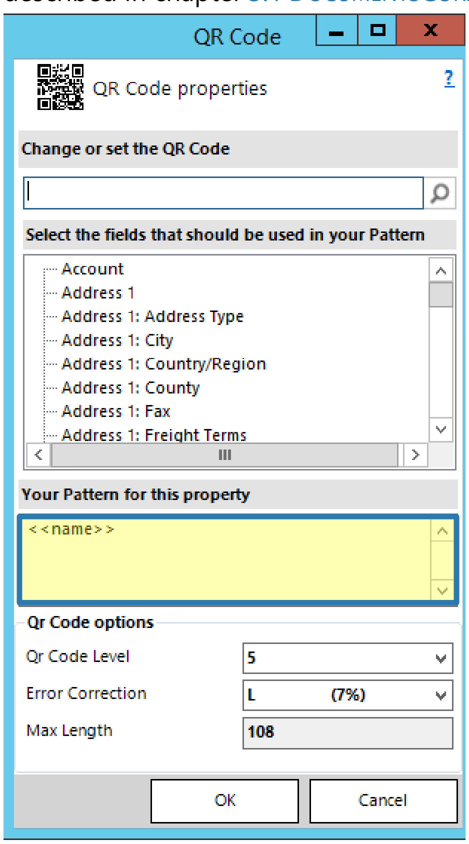


Figure 123: QR Code properties

5.19.3 QR Code options

The QR Code Level

shows the displayed level of the QR-Code. The default setting detects the smallest value.
If e.g.: the value of this option is set with 5 with a maximum sign-length of 108, then only 108 signs will be displayed. All signs that exceed the maximum length are cut.

The Error Correction

defines the capacity and fault tolerance of the QR-code. The value shows the amount that can be restored in percent.

The available options are:

- Level L =7 % of the code words/data can be recovered
- Level M = 15 % of the code words/data can be recovered
- Level Q = 25 % of the code words/data can be recovered
- Level H = 30 % of the code words/data can be recovered

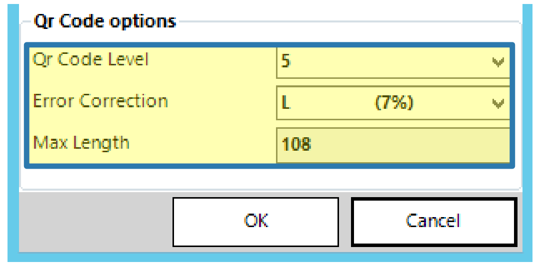


Figure 124: QR Code options

The Max Length is not editable and depends on the above settings.

5.19.4 Don't forget to save your template

Click on the ***[OK]-***button in the *QR Code properties field* and you will be provided with a beautiful placeholder for your future QR-Code.

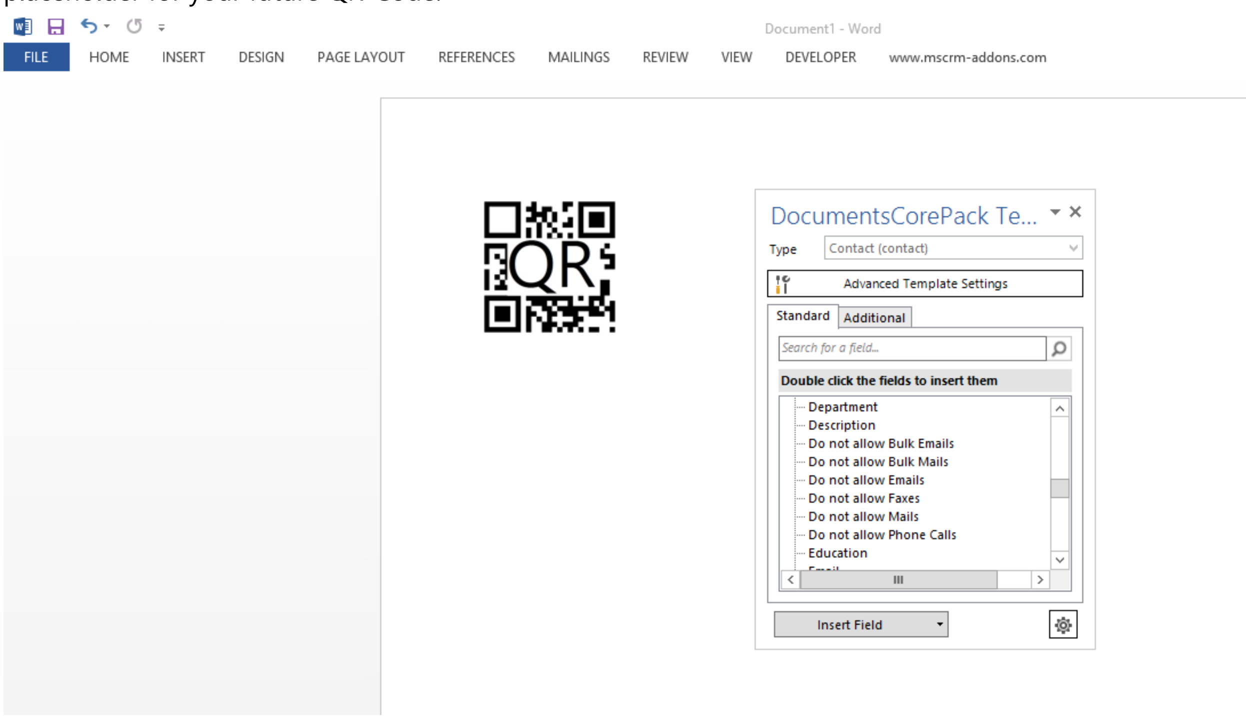


Figure 125: QR Code placeholder

5.20 How to insert an Advanced String

The following description will show you how to insert Advanced Strings properly.

5.20.1 Use the Insert Computed item option

Press *insert field*, hit *insert computed item* and select *Advanced String*.

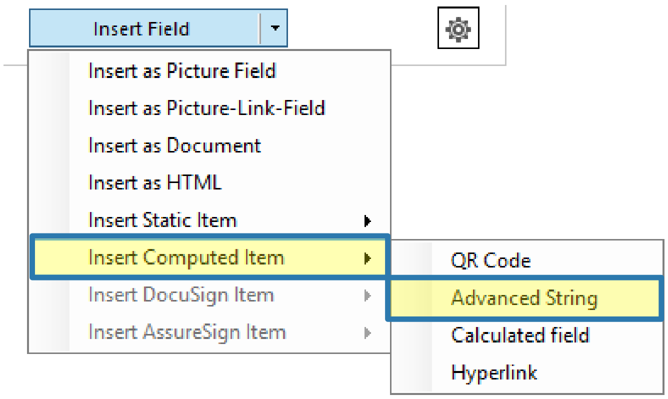
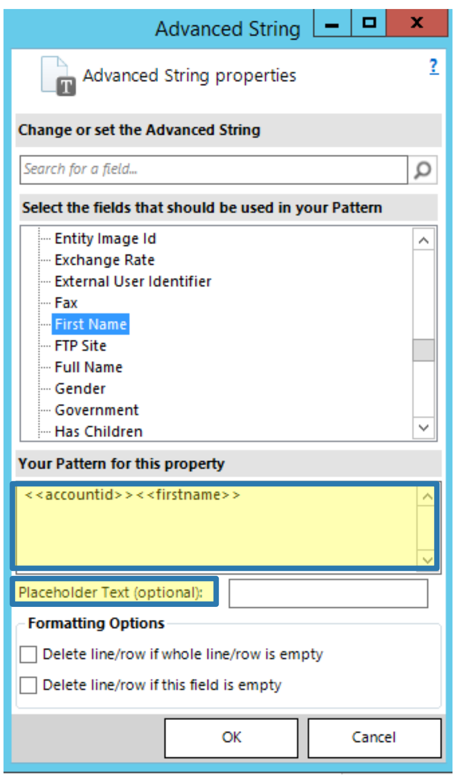


Figure 126: Select Advanced String in the Insert Field section

5.20.2 Create your Advanced String

Define your link pattern here. The used text will be transformed into an Advanced String. The syntax for this field is described in chapter 3.1 DOCUMENTSCOREPACK CLIENT PROPERTY SYNTAX, PAGE 58.



Optionally, you can set a placeholder name for your field (so the template is easier to find if you want to modify it in the future).

Figure 127: Advanced String properties

5.20.3 Advanced String formatting options

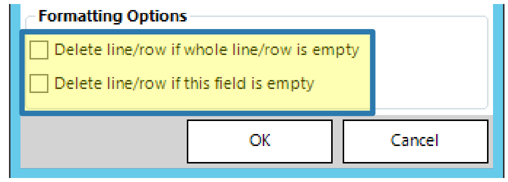


Figure 128: Advanced String formatting options

<u>Delete line/row if whole line/row is empty</u>
will delete each line/row that is empty if checked

<u>Delete line/row if this field is empty</u>
Will delete the whole line/row (no matter if empty or not) if this field is empty

5.20.1 Don't forget to save your template

Click on the ***[OK]***-button in the *Advanced String properties field* and you will be provided with a beautiful placeholder for your future String.

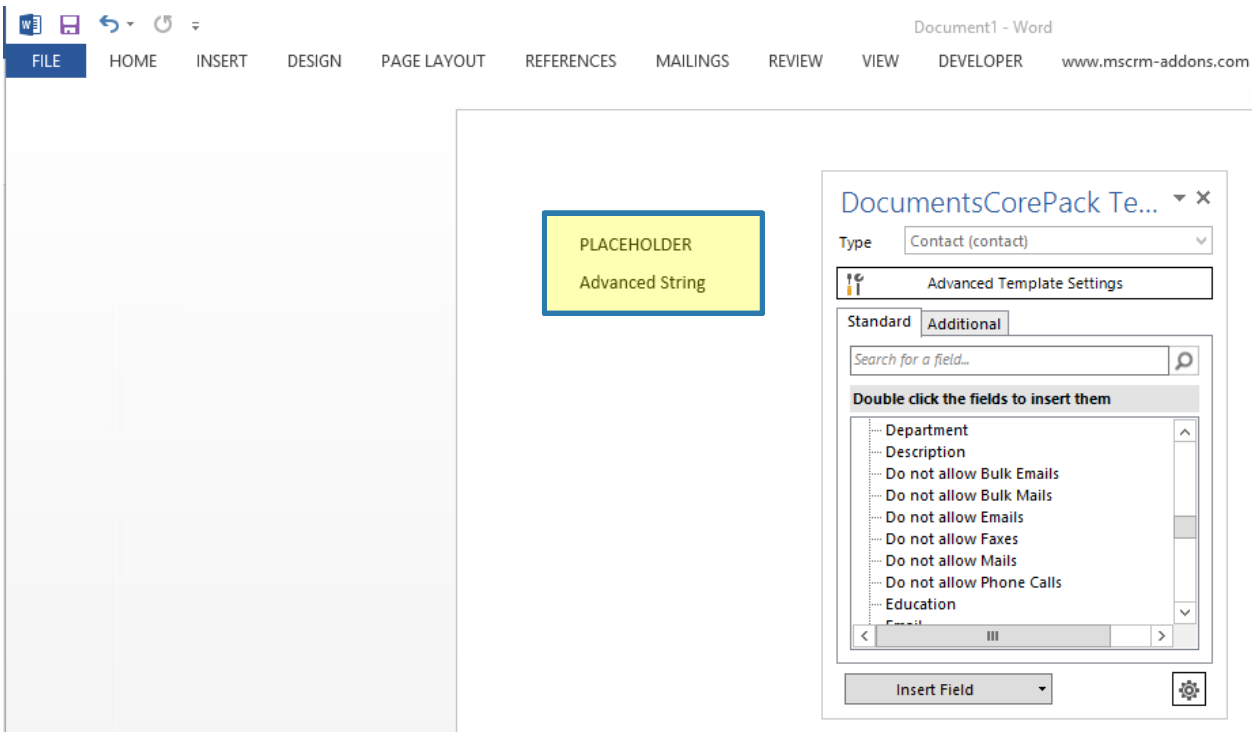


Figure 129: The example shows two inserted advanced strings: One inserted with PLACEHOLDER function, one without.

5.21 How to insert Calculated Fields

Computed fields allow you to do calculations based on CRM data.

5.21.1 Use the insert computed field option

Press *insert field*, hit *insert computed item* and select *Calculated field.*

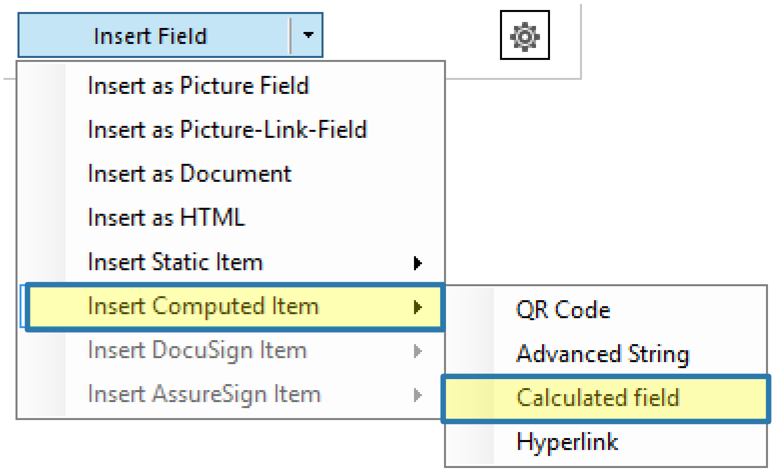


Figure 130: Select Calculated field in the Insert Field section

5.21.2 Create your calculation

Define your calculation pattern. The syntax for this field supports the basic arithmetic operations. Other than the usual DocumentsCorePack syntax, numeric values are added without single quotes. For further information on the syntax, please have a look at chapter 3.1 DocumentsCorePack Client Property Syntax, page 58.

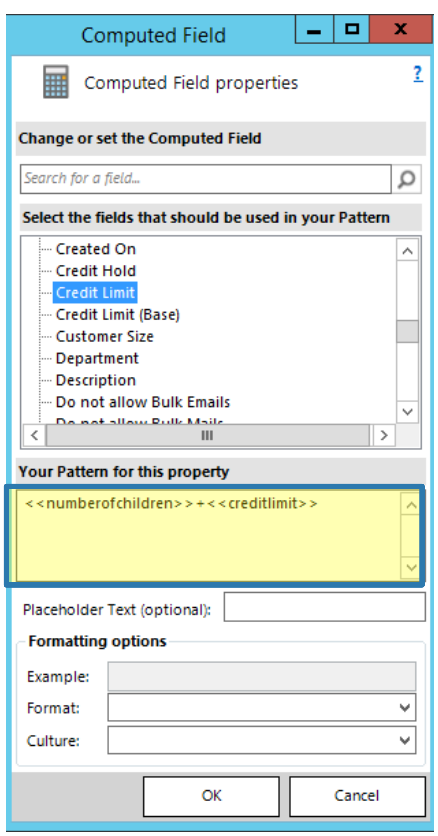


Figure 131: Computed field properties - insert calculation

5.21.3 Additional options

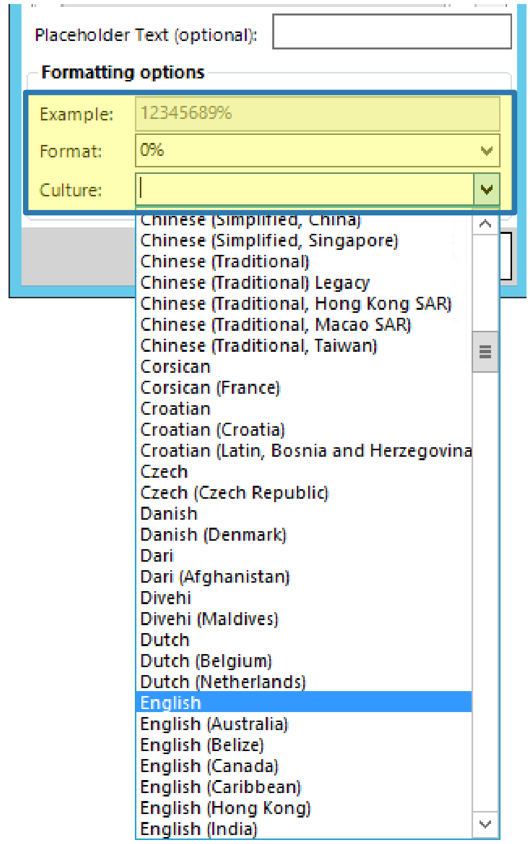


Figure 132: Formatting options

<u>Placeholder Text</u>

Optionally, you can set a placeholder name for your field (so the template is easier to find if you want to modify it in the future).

<u>Example</u>

In the example field, an example is shown that includes your selected formatting options.

<u>Format</u>

Applies a special format to your calculation (for example, a certain percentage)

<u>Culture</u>

Applies a certain culture to your calculation

5.21.4 Don't forget to save your template

Click on the ***[OK]***-button in the *Computed field properties field* and you will be provided with your calculated field.

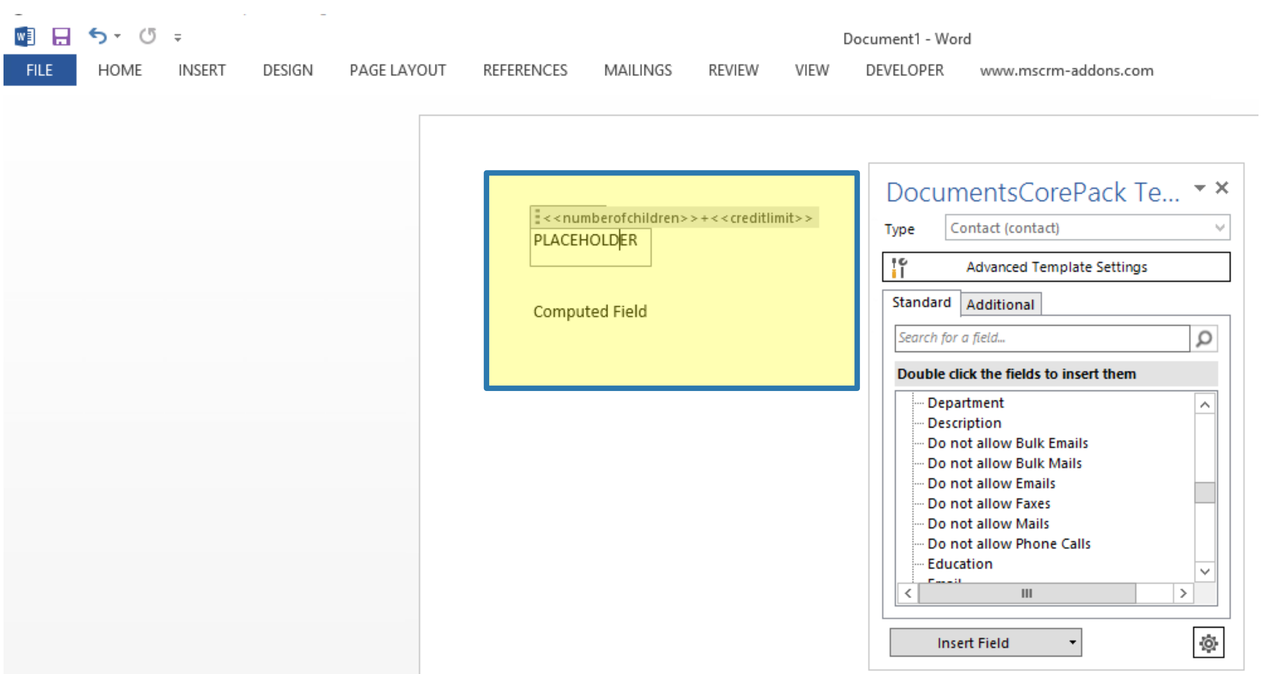


Figure 133: The example shows two inserted calculated fields: One inserted with PLACEHOLDER function, one without.

5.22 How to insert Hyperlink

This option allows you to define a patter for a dynamically created link.

5.22.1 Use the insert computed item option

Press *insert field*, hit *insert computed item* and select *Hyperlink*.

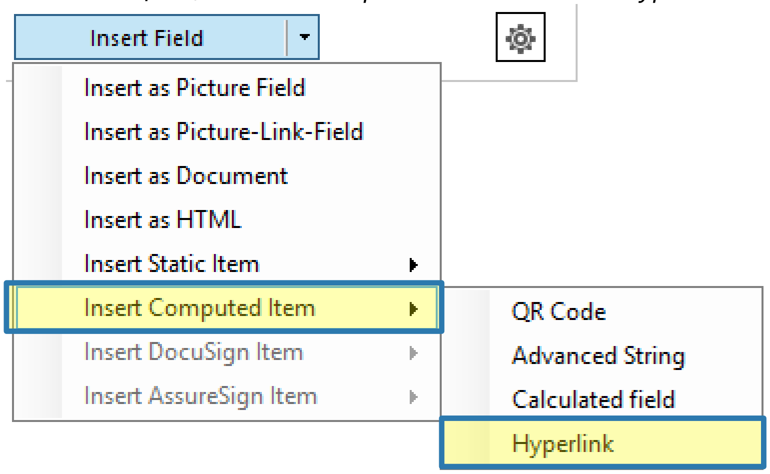


Figure 134: Select Hyperlink in the Insert Field section

5.22.2 Compose your link

Select the Link tab and define your Hyperlink pattern. For further information on the syntax, please have a look at chapter 3.1 DocumentsCorePack Client Property Syntax, page 58.

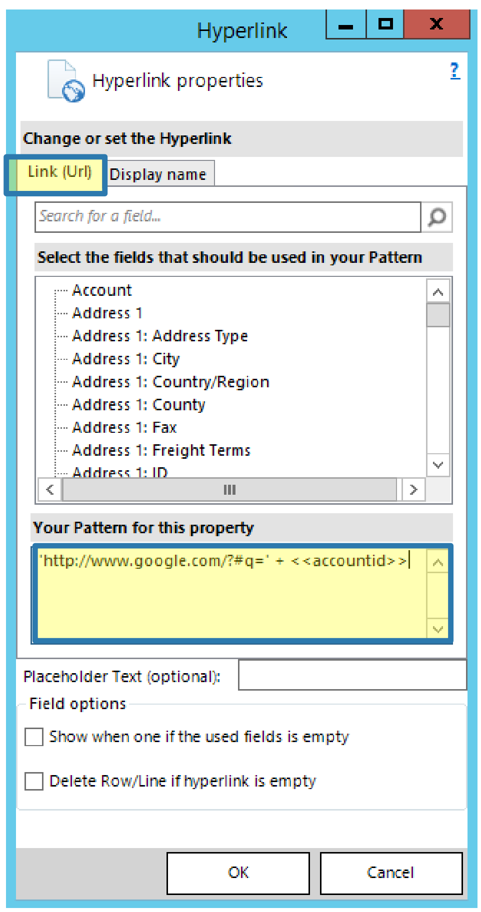


Figure 135: Hyperlink properties window

5.22.3 Additional options

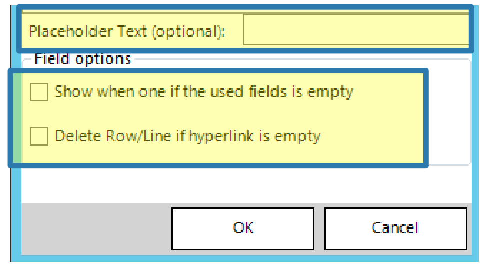


Figure 136: Additional hyperlink options

Placeholder Text

Optionally, you can set a placeholder name for your field (so the template is easier to find if you want to modify it in the future).

Show when one if the used fields is empty

Display the link even if one of the fields does not return data

Delete Row/Line if hyperlink is empty

Remove the link completely if there is no data returned.

5.22.1 Don’t forget to save your template

Click on the ***[OK]*-**button in the *Hyperlink properties field* and you will be provided with the result.

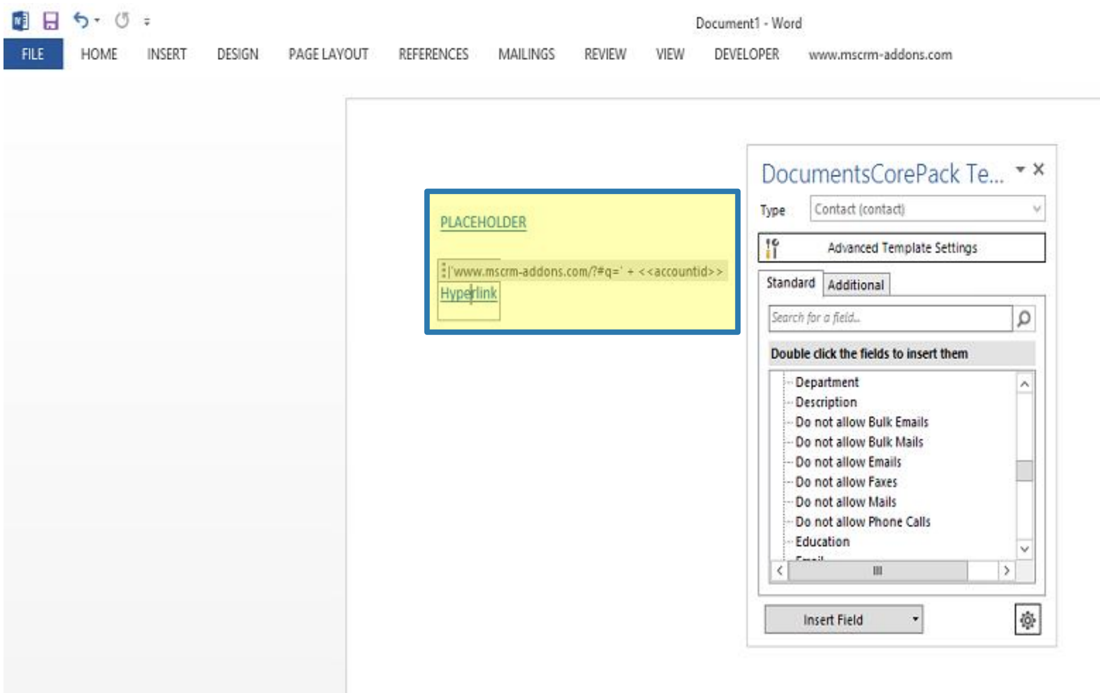


Figure 137: The example shows two inserted hyperlinks: One inserted with the PLACEHOLDER function, one without.

5.23 How to insert Field Properties

[COMING SOON]

5.24 How to add relationships

This functionality enables you to add a relationship to a certain entity in Microsoft Dynamics CRM.

5.24.1 Open the Configure fields and data source dialog

The ***[Add Relationship/Entity]***-button also includes buttons that allow its users to add a new relationship or to manage existing relationships and tables. For further information on how to manage tables, please have a look at CHAPTER 2.1 MANAGE TABLES, PAGE 54.

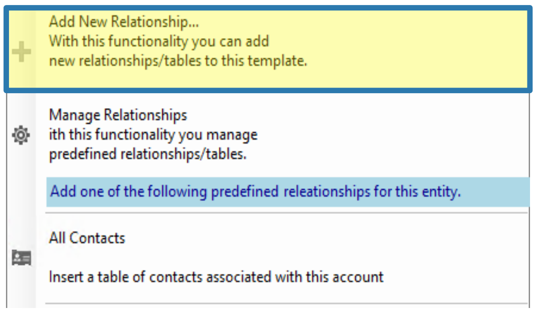


Figure 138: Add New Relationship...

Clicking the ***[Add New Relationship...]***-button opens the dialog shown below. Within it, you can configure fields, tables and relationships that are important for your document.

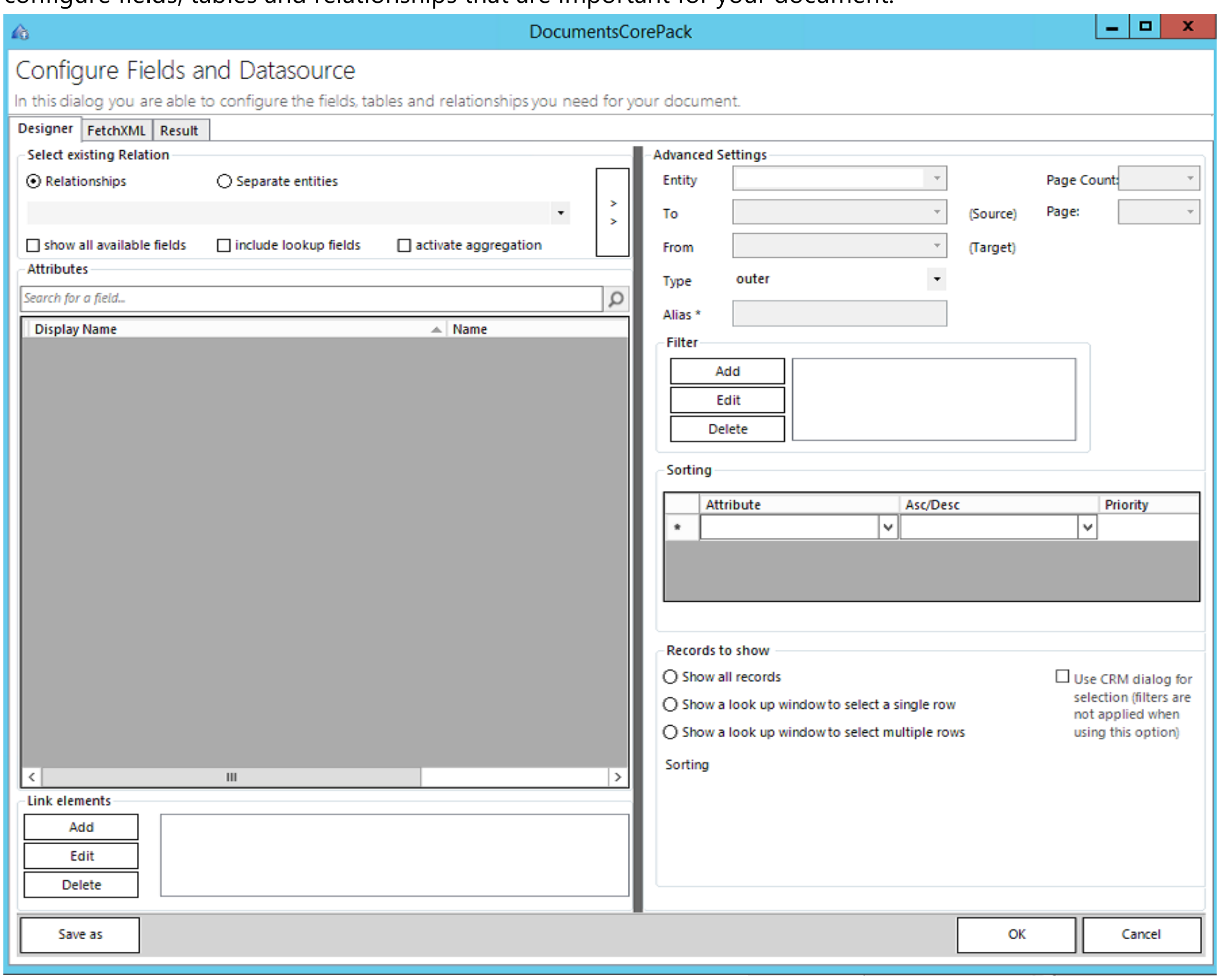


Figure 139: Add New Relationship... - Configure Fields and data source dialog

5.24.2 Add a new relationship

Adding a new relationship mostly requires the left part of the *Configure fields and data source dialog* (except for the ***[OK]***-button that adds the relationship which you find at the right side of the *Configure Fields and data source dialog*.)

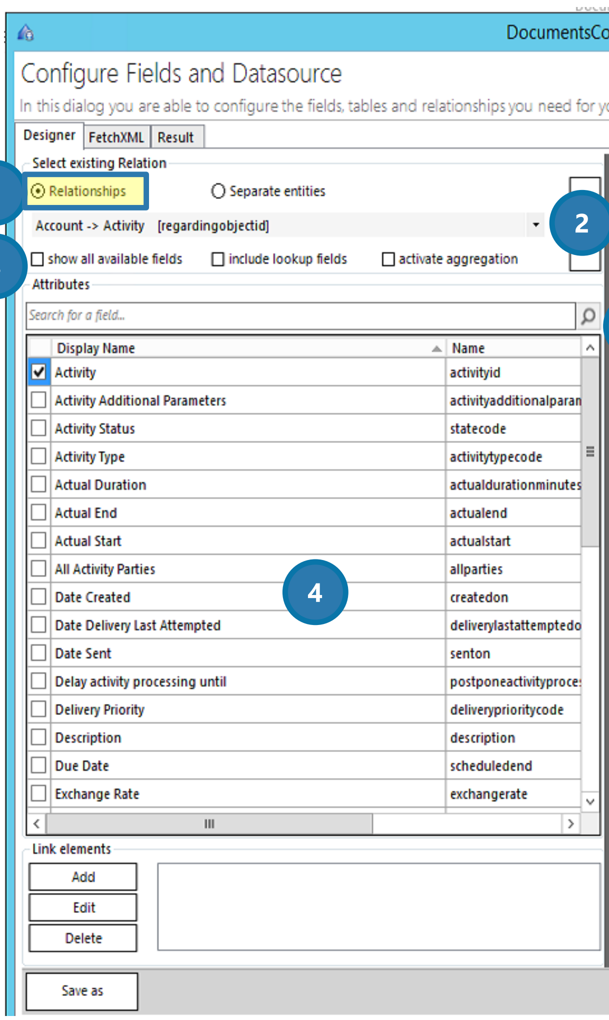


Figure 140: Add New Relationship - Configure Fields and data source dialog section

1 Make sure that you have selected *Relationships* in order to create a relationship. Marking *Separate Entities* would create entities that have no filter applied. If you want to do so, please have a look at chapter 5.25 HOW TO ADD A SEPARATE ENTITY ON PAGE 113.

2 Look for the relationship you want to establish in the drop down menu.

3 The 3 options allow you to modify the displayed fields.

Check *show all available fields* if you want all available fields to be displayed.

Check *include lookup fields* if you want lookup fields to be added to your results.

Check *activate aggregation* if you want to use the aggregation functionality. For further information on the aggregation functionality, have a look at 1.8.1 AGGREGATION, PAGE 39.

4 The attributes list view shows all attributes that can be applied to your relationship. Select the ones you would like to add by checking the checkbox in front of the attribute.

5 The search-functionality allows you to search for attributes.

5.24.3 Get the result

Click on the ***[OK]***-button in the *Configure fields and data source dialog* and you will be provided with the following dialog. Here, you can modify the new table. Please have a look at CHAPTER 5.1.4 STEP 3: INSERT THE TABLE, ON PAGE 67 for details.

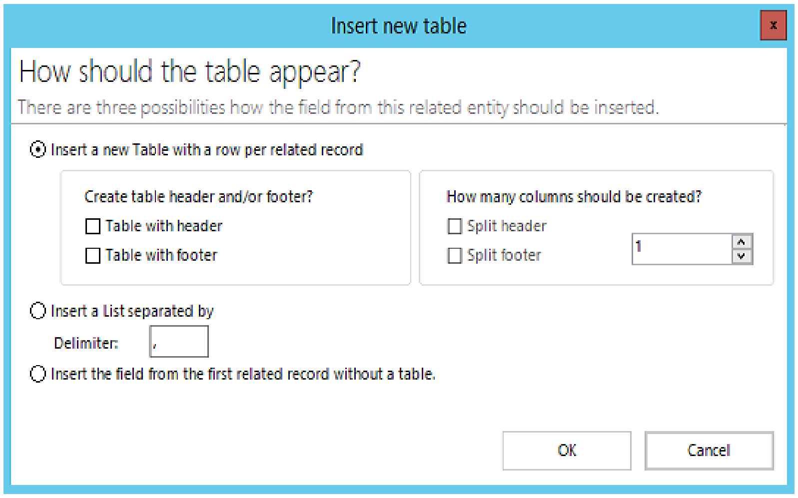


Figure 141 – Insert new table

As soon as you have decided how you would like to insert your new table, click on the ***[OK]***-button. We decided to insert the field from the first related record without a table, so you can see that there exists also the possibility to insert the fields without table-function. You are provided with a new table ❶. If you move your mouse cursor over *Activity*, a *Boolean field* ❷ is displayed. It contains all the information regarding to the relation. A click on the ***[Insert field]***-button inserts the result (a placeholder ❸) into your template.

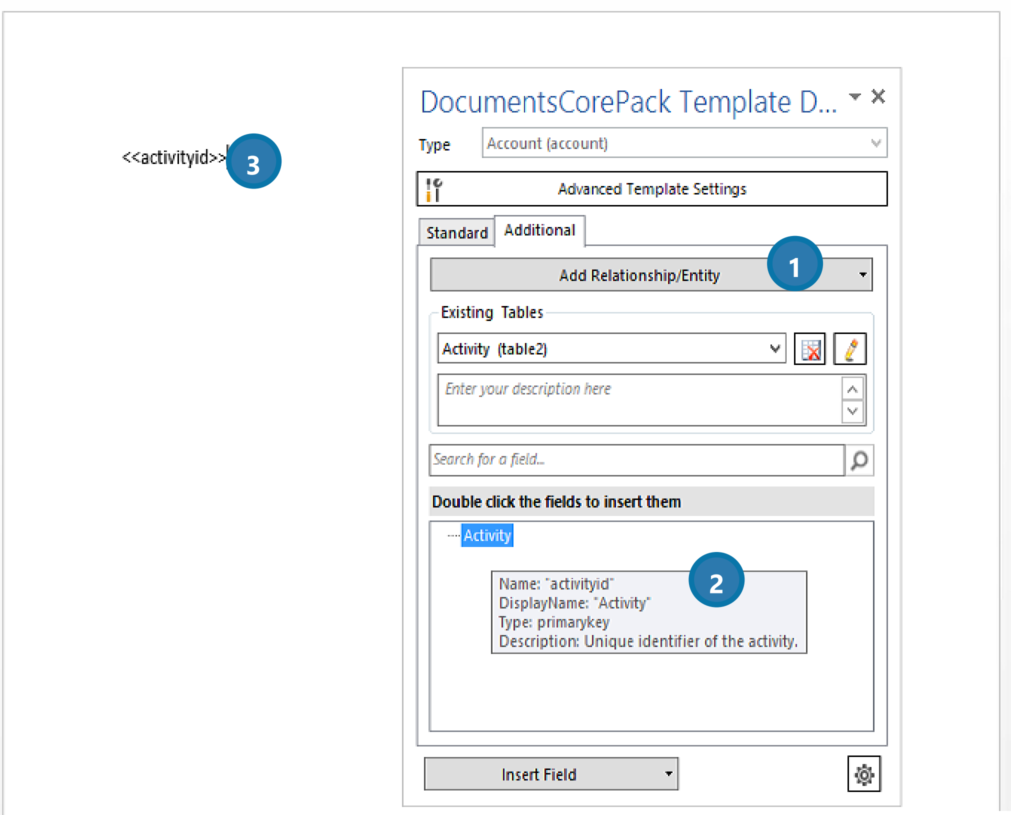


Figure 142 – Add new relationship – result

5.25 How to add a separate entity

When you add a separate entity, you must be well aware, that the so added entity does not have any filter applied. If you use this option, you have to add the filter manually.

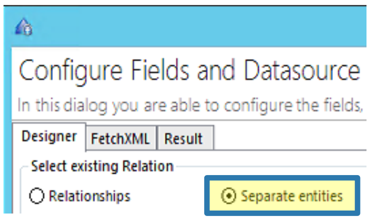


Figure 143 – Configure fields – separate

In order to add a separate entity, follow the steps shown in CHAPTER 5.24 HOW TO ADD RELATIONSHIPS, PAGE 110, but take care to check the *Separate entities* option in the *Select existing relation* part of the dialog and to add a filter manually (see next chapter).

5.25.1 How to add the filter manually

To add a filter manually, click on the [Add]-button in the filter section (1). Then select which type of condition you would like to apply (2) and click on the [Add]-button (3) in order to set the conditions attributes and values. Have a look at chapter 3.1 DOCUMENTSCOREPACK CLIENT PROPERTY SYNTAX ON PAGE 58 to learn more about the DocumentsCorePack syntax settings.

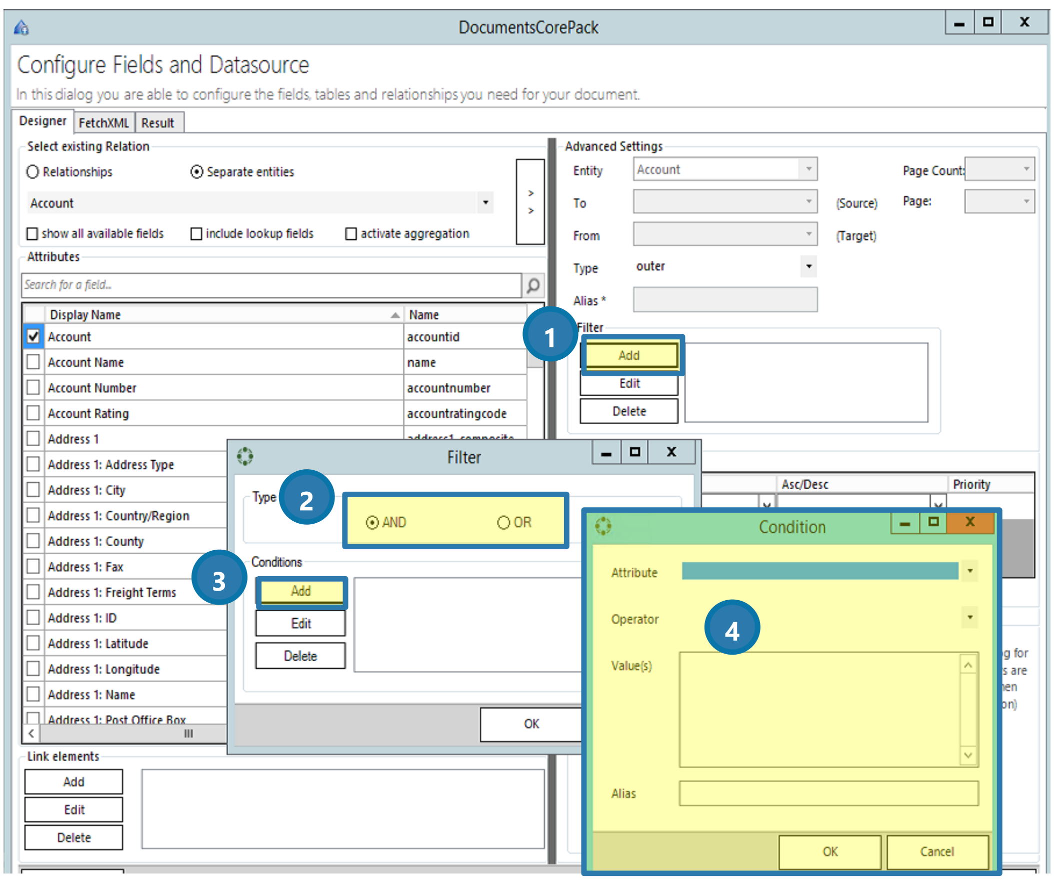


Figure 144 – Configure fields and entities dialog: Add filter manually

6 DocumentsCorePack Template Designer Settings

The DocumentsCorePack Settings summarize application settings for both intended usages of the client. This chapter will only cover the settings that are of interest for the Template Designer functionality.

The DocumentsCorePack Settings can be accessed from within the Word Ribbon.

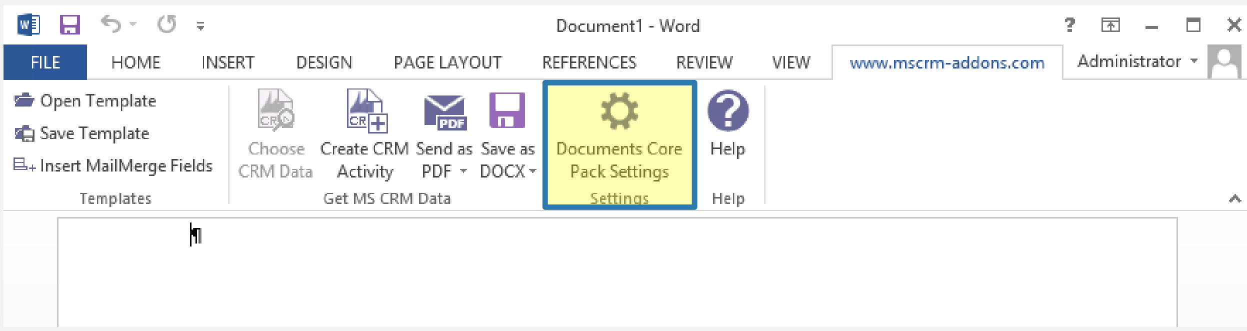


Figure 145: Microsoft Office Word with mscrm-addons.com Ribbon – Documents Core Pack Settings

The settings are grouped in several sections. This guide will only explain some of the options that are available in the general and advanced section.

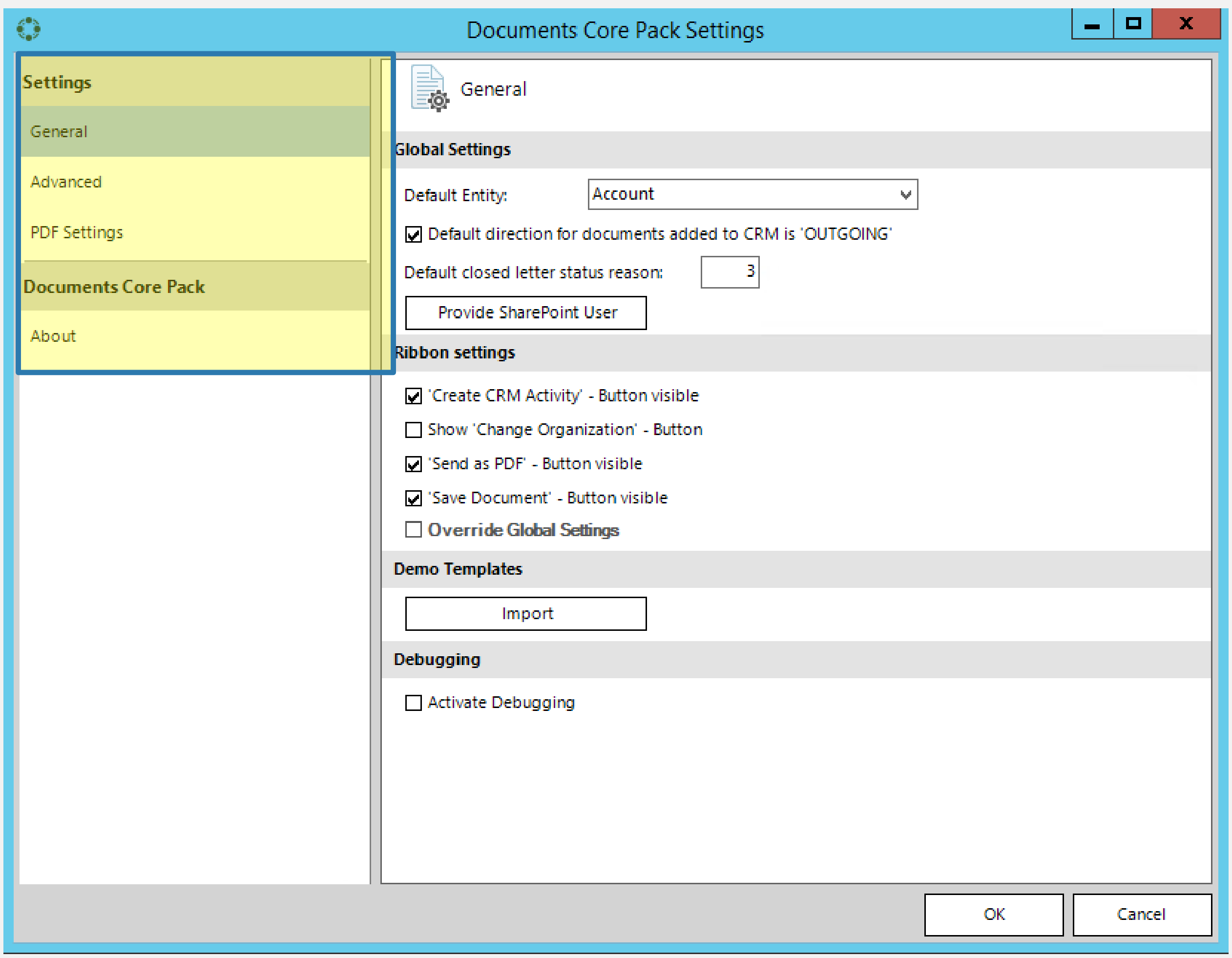


Figure 146: Documents Core Pack Settings

6.1 General

The general section contains several settings for the DocumentsCorePack client.

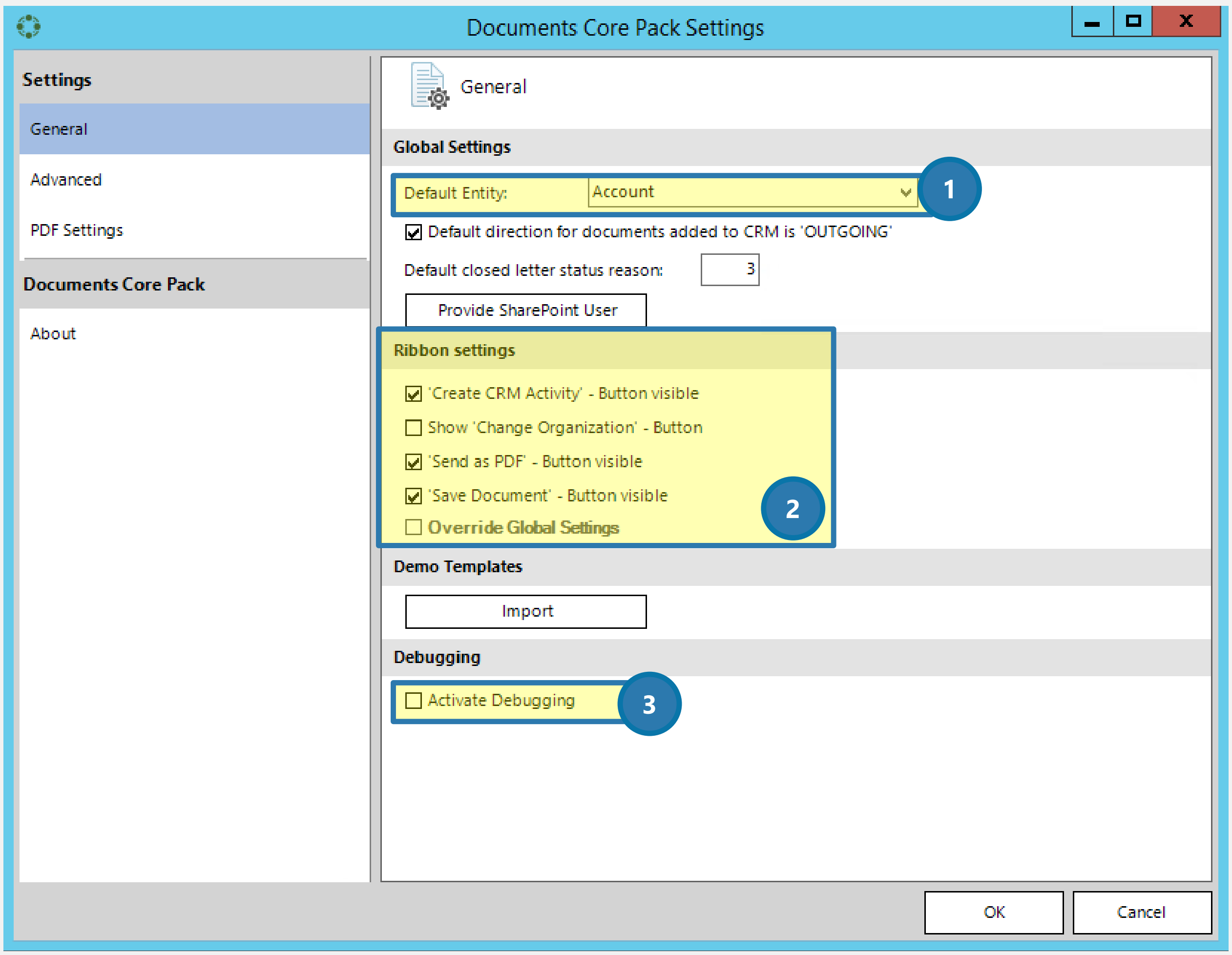


Figure 147: Documents Core Pack Settings - General

1 Default Entity

The default entity is the entity that is automatically selected in the task pane. (Please SEE CHAPTER 1.3 THE DOCUMENTSCOREPACK TEMPLATE DESIGNER USER INTERFACE (STANDARD) ON PAGE 11)

2 Ribbon Settings

With the Ribbon settings you can change the layout of the www.mscrm-addons.com-ribbon. If you don't want to see the client functionality at all you can disable the "Send as PDF" or "Save Document" options. This can be also set on a global setting for all DCP client users.

❸ Activate Debugging

In case you experience problems with DocumentsCorePack you might be asked to enable debugging for the client. This setting will start tracing and write logging information into the log folder location ("%temp%\DCP\Logs). Additionally, the ribbon will be extended with debugging options. You can open the log folder location form there and also single log files.

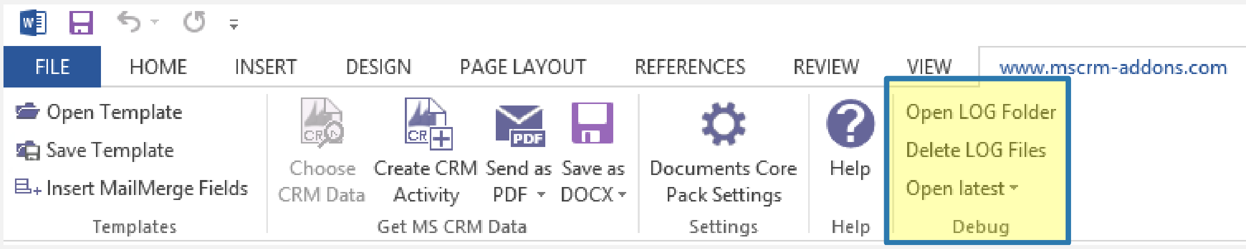


Figure 148: Word Ribbon with Debugging options

6.1.1 Advanced

The advanced options are more specific options

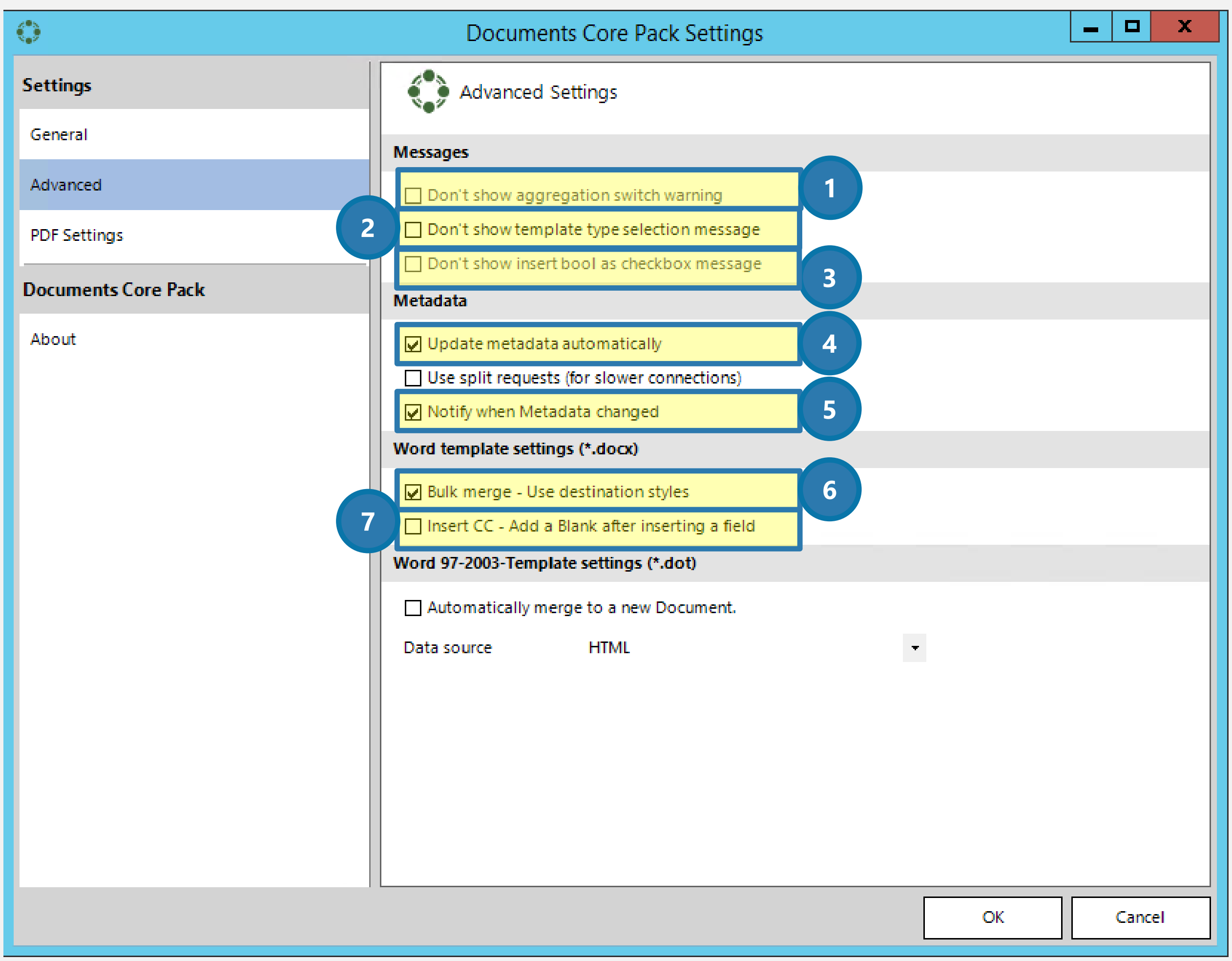


Figure 149: DocumentsCorePack Settings - Advanced

❶ Once checked, the aggregation switch warning is not shown again. For further information on aggregation fetches, please have a look at CHAPTER 5.7 HOW TO CREATE AN AGGREGATION FETCH, PAGE 79.

❷ Once checked, the template type selection message is not displayed again in the beginning. The type selection message enables you to select between .dot and .docx templates. We recommend you to stick with the .docx templates.

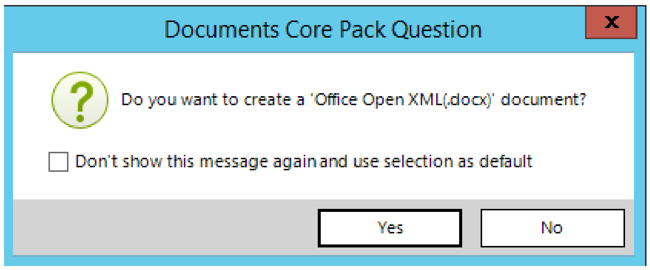


Figure 150: DocumentsCorePack Template Designer type selection message

❸ When checked, insert bool is not displayed as checkbox message.

❹ When checked, metadata from CRM is updated automatically. We recommend this box to be checked because you do not have to update the metadata manually each time it has changed.

❺ Once checked, you are notified if your metadata should have changed.

❻ When checked, destination style is preferred for bulk merge.

❼ When checked, a blank is automatically inserted when a field is inserted and emails are automatically sent as carbon copy.

Options ❶ to ❸ are only enabled when the “Do not show again” option was set once on for any of these dialogs.

7 General Word functionality that is referenced in this guide

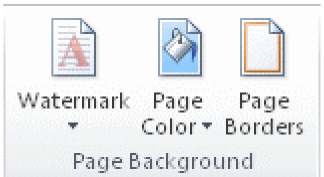
Within this chapter, you find some word short How-To's related to Word functionalities that could be useful in order to work with templates.

7.1 How to insert a Watermark

Watermarks can be viewed only in Print Layout and Full Screen Reading views and on the printed page. You can insert a predesigned watermark from a gallery of watermark text, or you can insert a watermark with custom text.

How to

On the Page Layout tab, in the Page Background group, click Watermark.



Do one of the following:

Click a predesigned watermark, such as **Confidential** or **Urgent**, in the gallery of watermarks.

Click **Custom Watermark**, click **Text watermark** and then select or type the text that you want. You can also format the text. To view a watermark as it will appear on the printed page, use Print Layout view.

Source: https://support.office.com/en-us/article/Insert-a-watermark-or-change-a-watermark-f90f26a5-2101-4a75-bbfe-f27ef05002de

For further information on watermarks have a look at https://support.office.com/en-us/article/Insert-a-watermark-or-change-a-watermark-f90f26a5-2101-4a75-bbfe-f27ef05002de

7.2 How to work with field functions

Insert a field

1. Click where you want to insert a field.
2. On the Insert tab, in the Text group, click Quick Parts, and then click Field.

3. In the Categories list, select a category.
4. In the Field names list, select a field name.
5. Select any properties or options that you want.

- If you want to see the codes for a particular field in the Field dialog box, click Field Codes.
- To nest a field within another field, first insert the outer, or container, field, by using the Field dialog box. In your document, place the insertion point inside the field code where you want to insert the inner field. Then use the Field dialog box to insert the inner field.

If you know the field code for the field that you want to insert, you can also type it directly in your document. First press CTRL+F9, and then type the code within the brackets.

Source: https://support.office.com/en-US/article/Insert-and-format-field-codes-in-Word-2010-7E9EA3B4-83EC-4203-9E66-4EFC027F2CF3#bm1
For further information on fields, please have a look at https://support.office.com/en-US/article/Insert-and-format-field-codes-in-Word-2010-7E9EA3B4-83EC-4203-9E66-4EFC027F2CF3#bm1

7.3 CRM SharePoint Integration

Microsoft SharePoint Server is a collaboration and content management application that simplifies how people store, find, and share information. It helps people to collaborate effectively by having secure access to documents and information that they require to make business decisions.

The SharePoint integration feature enables you to store and manage documents on SharePoint in the context of a Microsoft Dynamics CRM record, and use the SharePoint document management abilities in Microsoft Dynamics CRM, such as checking the document in and out, viewing version history, and changing document properties.

Source: https://msdn.microsoft.com/en-us/library/gg334768.aspx
For more information on CRM SharePoint Integration please have a look at
https://msdn.microsoft.com/en-us/library/gg334768.aspx

7.4 What is CRM Metadata

Microsoft Dynamics CRM 2016 and Microsoft Dynamics CRM Online uses a metadata driven architecture to provide the flexibility to create custom entities and additional system entity attributes. This structure also makes upgrades and the transportation of customizations easier. The data structure can change without requiring any change to code in the Microsoft Dynamics CRM server or client applications.

Source: https://msdn.microsoft.com/en-us/library/gg309434.aspx
For more information on CRM Metadata, please have a look at: https://msdn.microsoft.com/en-us/library/gg309434.aspx

7.5 Location of files

[COMING SOON]

8 DCP Diagnostics

[COMING SOON]

9 References

MSDN. (n.d.). Retrieved from https://msdn.microsoft.com: https://msdn.microsoft.com/en-us/library/gg328332.aspx

10 Glossary

Attribute
An attribute is a container for a piece of data in an entity. Microsoft Dynamics CRM supports a wide variety of attribute types.

SharePoint
SharePoint is a web application platform in the Microsoft Office server suite. SharePoint combines various functions. In combination with Microsoft Dynamics CRM the document management is in focus.

SharePoint Metadata
The document management capability of SharePoint allows you to define

CRM MetaData
Microsoft Dynamics CRM 2016 and Microsoft Dynamics CRM Online uses a metadata driven architecture to provide the flexibility to create custom entities and additional system entity attributes. This structure also makes upgrades and the transportation of customizations easier. The data structure can change without requiring any change to code in the Microsoft Dynamics CRM server or client applications.

Relationship
A relationship defines an association between two entities: one-to-many, many-to-one, many-to-many, and self-referential.

Entity
An entity is a container for data, similar to a table in a traditional database. Each entity contains a set of attributes. For Microsoft Dynamics CRM, there are a set of entities that exist when you first install. Some of these are customizable. In addition, you can create custom entities to contain business data.

Form Fields
https://msdn.microsoft.com/en-us/library/gg309434.aspx

Watermarks
Watermarks are text or pictures that appear behind document text. They often add interest or identify the document status, such as marking a document as a Draft. You can see watermarks in Print Layout view and Full Screen Reading view or in a printed document.
(Source: https://support.office.com/en-us/article/Insert-a-watermark-or-change-a-watermark-f90f26a5-2101-4a75-bbfe-f27ef05002de)

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or contact support@mscrm-addons.com.

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