



**mscrm-addons.com**  
**AutoMerge for MS CRM 2011**

# AutoMerge for MS CRM 2011

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Version 5.0

## **Users Guide**

(Use of AutoMerge for MS CRM 2011)

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## 1 Intro

AutoMerge provides the possibility to create and print documents automatically triggered from a workflow or dialog. After the document is created, it can be attached to emails and letters as well.

### Main Features:

- **CreateDocument**  
Enables creation of Word-Documents with data from MS CRM. It's capable to resolve any relations and works with custom entities as well as with standard CRM entities. Therefore AutoMerge provides the opportunity to automatically create e.g. quotes, invoices including data from related records like "other contacts", accounts, products etc.,...
- **Attach to Email/Letter**  
With this functionality the generated document can be attached to emails and letters.
- **PrintOut**  
AutoMerge also provides the possibility to print out the created document.
- **DeleteDocument**  
Delete an existing document from the "MSCRM-ADDONS.com User/Temp Settings" entity.
- **SendEmail**  
Gives you the ability to send an existing email.

This documentation aims to describe the main settings, including step-by-step descriptions about how to use all benefits provided by AutoMerge.

## 2 Use AutoMerge functionality

To use the AutoMerge functionality there is no client software necessary. It can be accessed directly within CRM from workflows and dialogs.

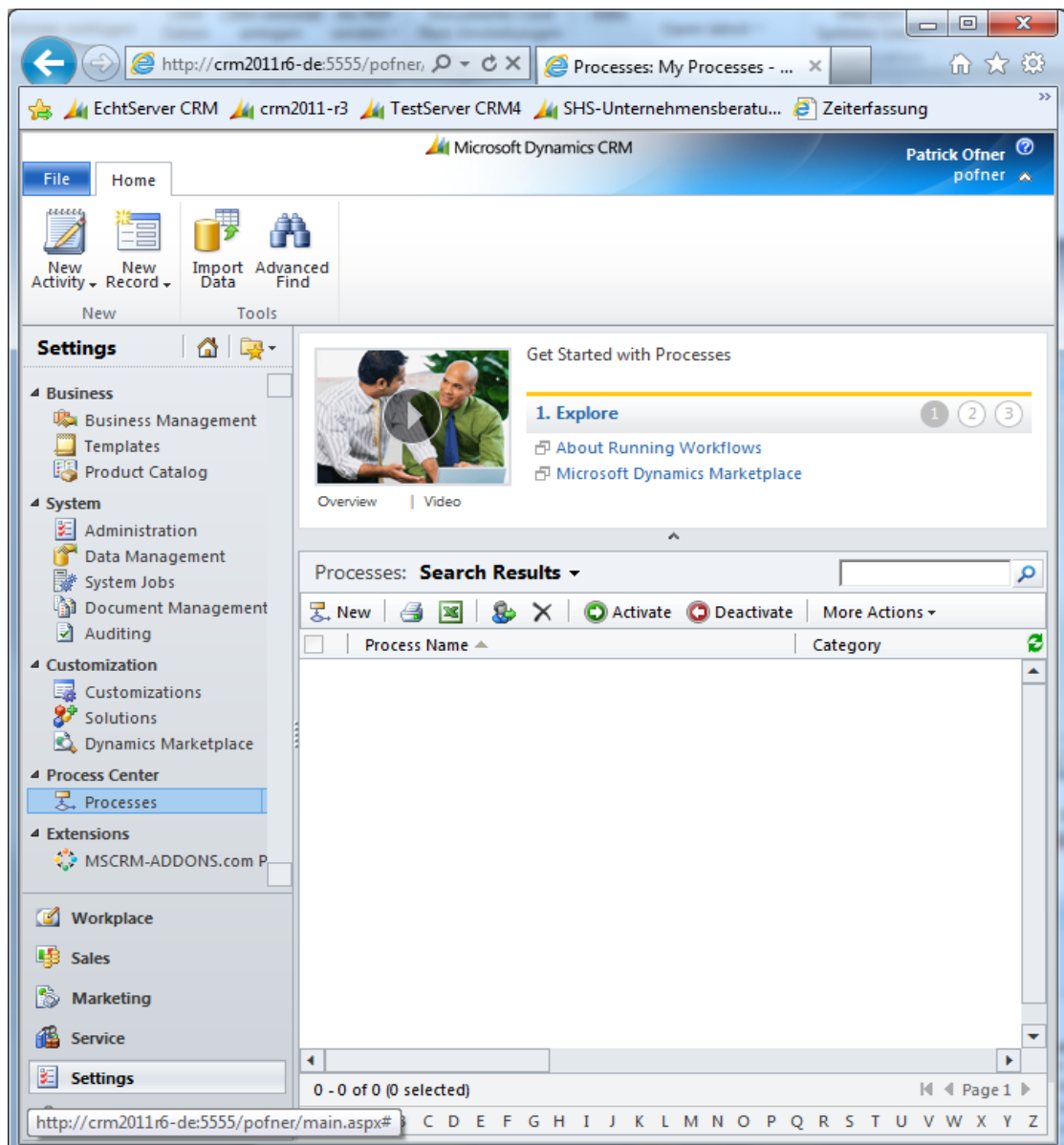
The following descriptions show where the AutoMerge functionality can be found and which requests are available.

**There are two possibilities to set up AutoMerge (onPremise or CRM Online). While AutoMerge onPremise works as a Plugin in CRM, AutoMerge for CRM Online needs a service (see AutoMerge InstallationGuide for MS CRM 2011).** To create Workflows for onPremise read 2.1 and for CRM online 2.2.

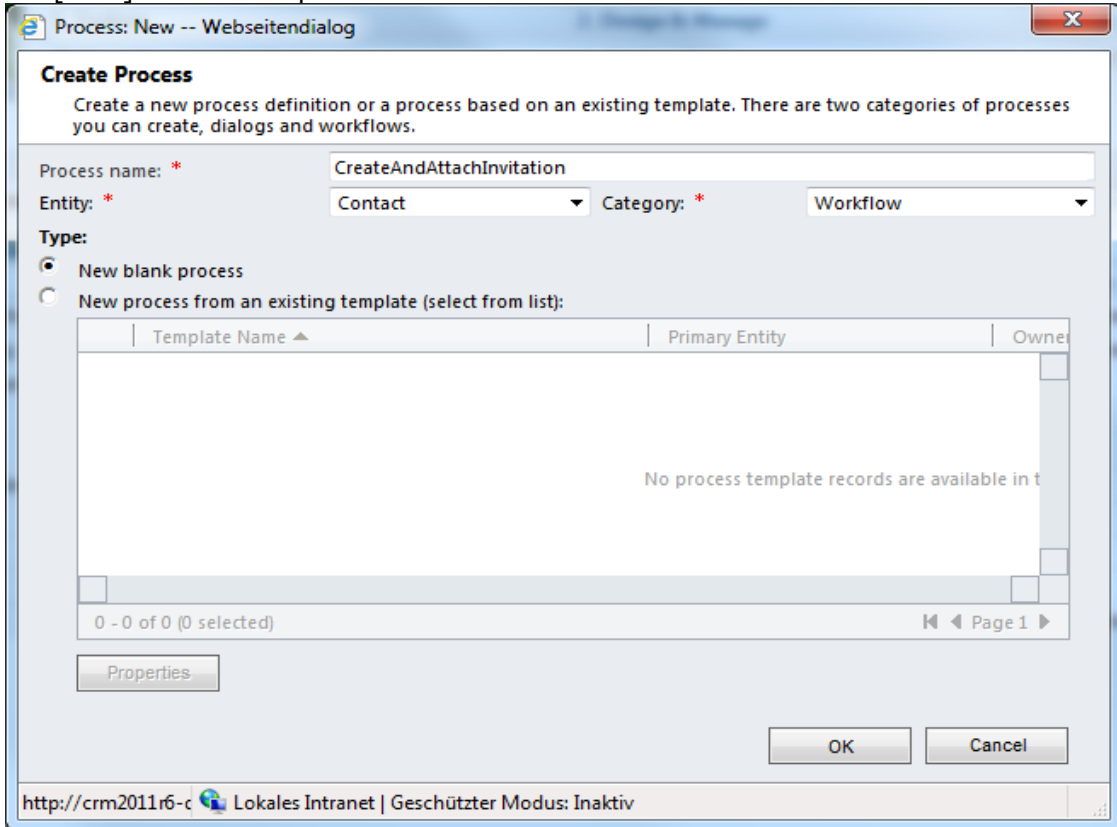
### 2.1 Workflow (on Premise)

This section shows how the AutoMerge functionality can be used by starting from a workflow (this works only for Premise Version).

Within CRM open Settings -> Processes



Hit [New] to create a process.



**Create Process**  
Create a new process definition or a process based on an existing template. There are two categories of processes you can create, dialogs and workflows.

Process name: \* CreateAndAttachInvitation  
Entity: \* Contact Category: \* Workflow

Type:  
 New blank process  
 New process from an existing template (select from list):

Template Name ▲	Primary Entity	Owner
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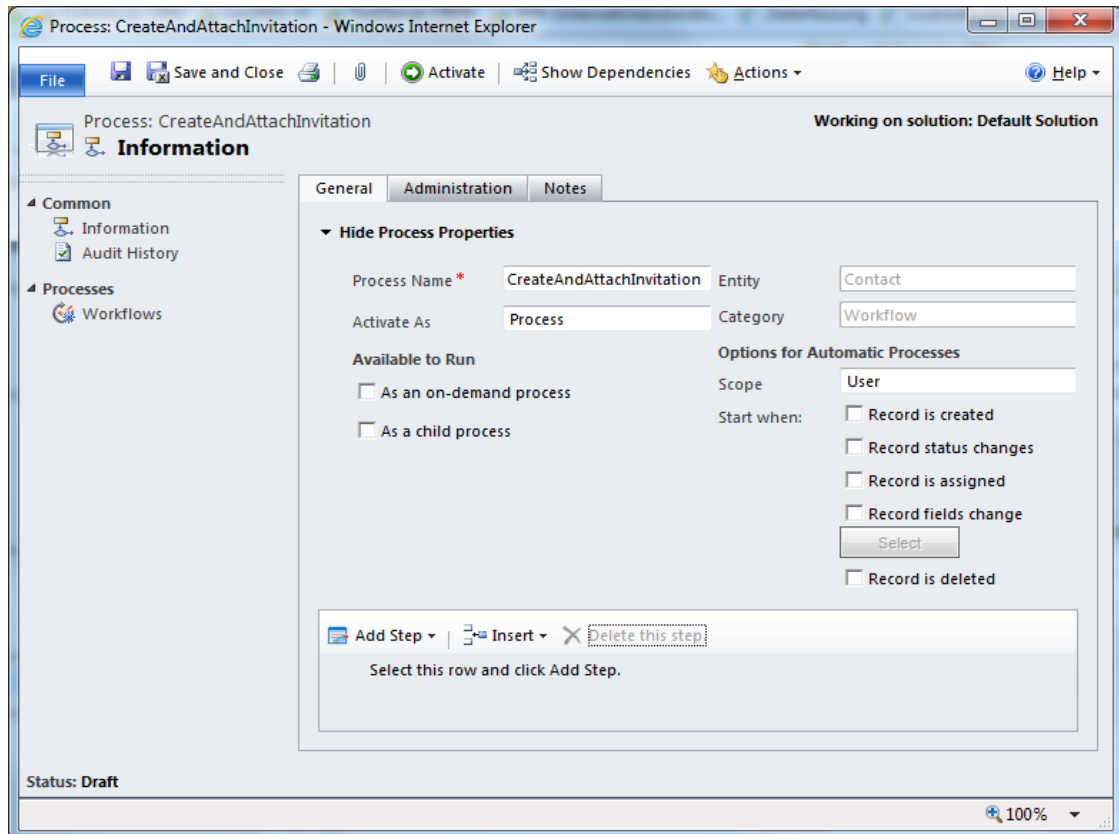
No process template records are available in t

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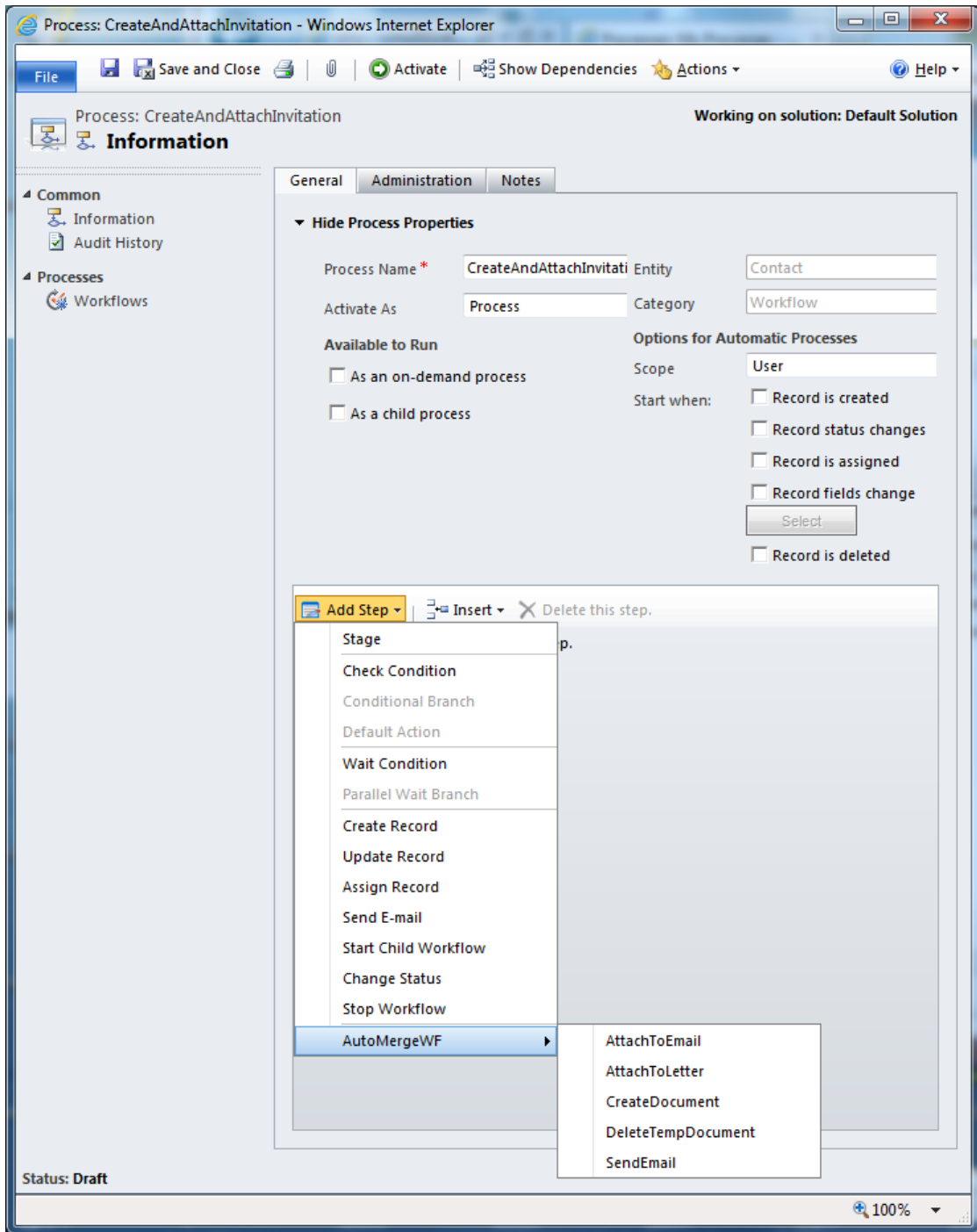
Properties OK Cancel

http://crm2011r6-c Lokales Intranet | Geschützter Modus: Inaktiv

Give the new process a name, define the starting entity and select "Workflow" in the drop down box. To start with a new workflow, select "New blank process". Hit [OK] to proceed. Then the standard workflow configuration window will appear.



Use it to create your own workflow. When you're at the part to use the AutoMerge functionality, go to "Add Step" -> "AutoMergeWF".

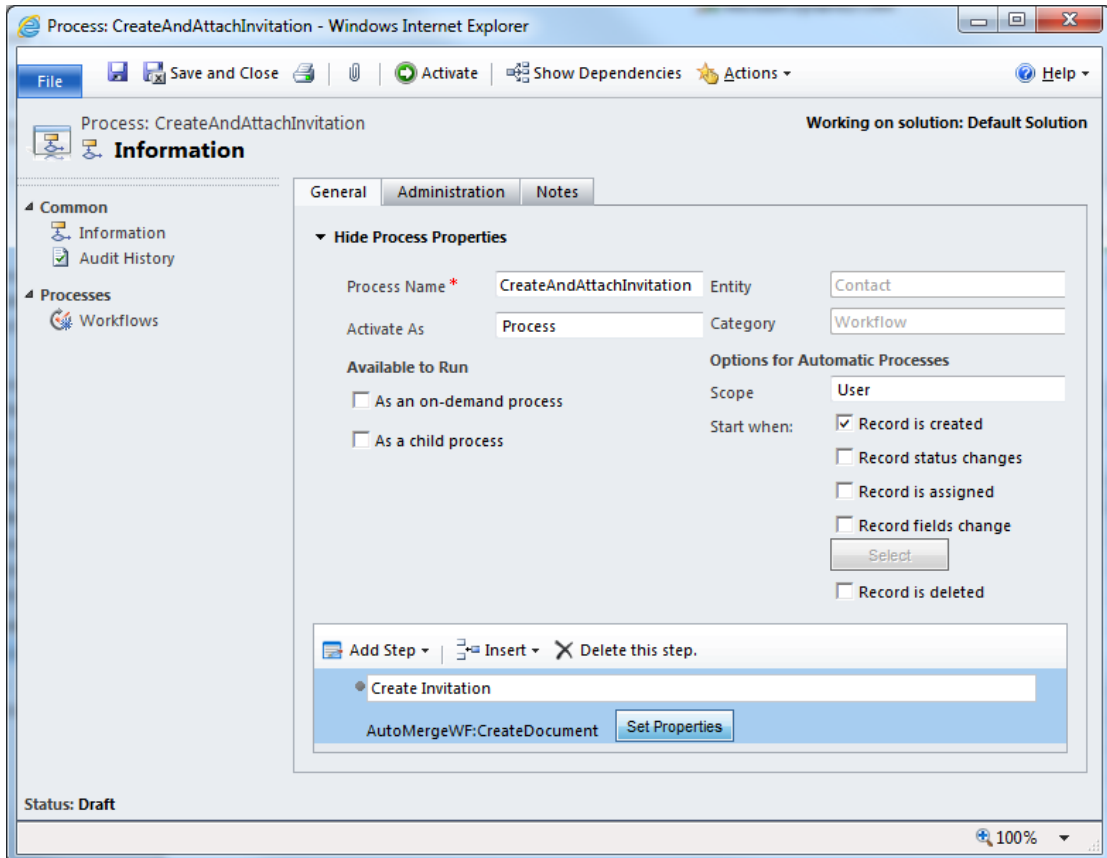


Then you can see all five available AutoMerge steps. The handling of these is like standard workflow steps:

- CreateDocument
- AttachToEmail
- AttachToLetter
- DeleteTempDocument
- SendEmail

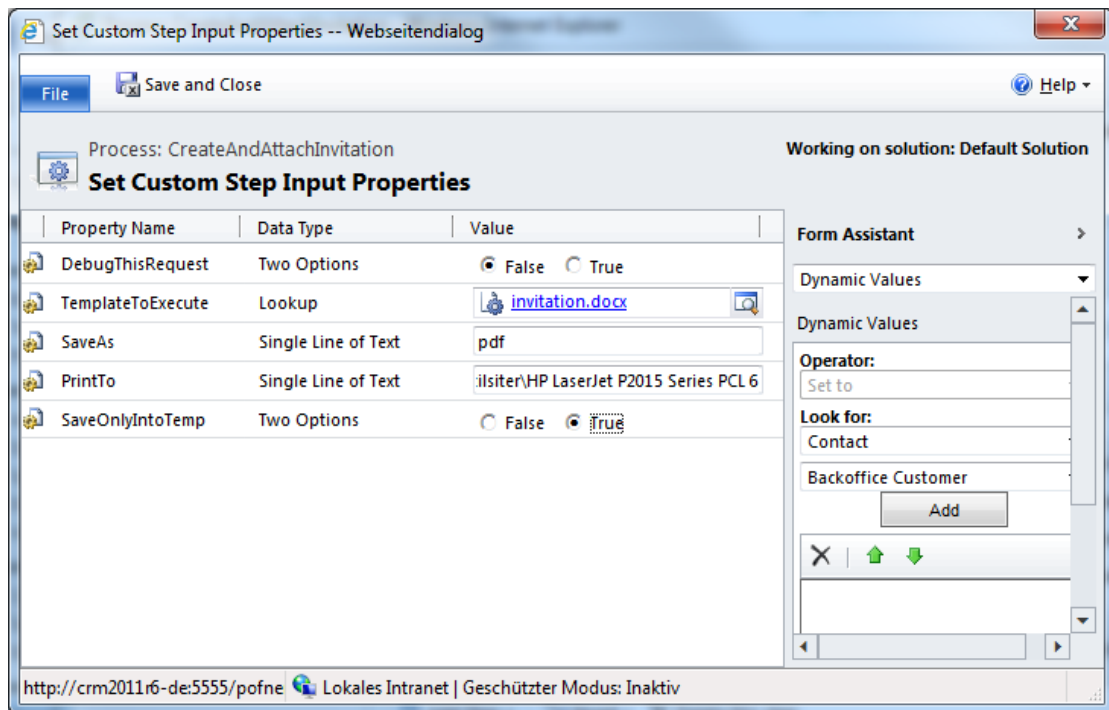
## 2.1.1 CreateDocument

Select this option to create a new document based on a template.



First give your new step a meaningful name.  
Then hit [Set Properties] to define the settings:





The "CreateDocument" functionality provides the following properties:

### 2.1.1.1 DebugThisRequest

If this box is set to "True" the AutoMerge Plugin will write debug information while the creation of the template. This is only required if this part of the process doesn't work correctly. Due to the fact that it will slow down the whole process, we recommend setting it to "False" in normal cases.

### 2.1.1.2 TemplateToExecute

Use this lookup-field to select a template. It will be the base of your generated document. You have the choice between all template stored in the "DocumentsCorePack Templates" entity in CRM. Please note that the selected template must be compatible with entity of this workflow. That means if you create for example a workflow for the entity "contact", the starting entity of the selected template has to be "contact" as well. Please also keep in mind that **only ".docx" templates will work** with AutoMerge.

### 2.1.1.3 SaveAs

Here you have the possibility to define the data type of the created document. The following file extensions are available. The left column shows the text you have to type in and the left one the file extension of result document.

You have to type in	File extension
text	.txt
png	.png
jpeg	.jpg
html	.html
epub	.epub
doc	.doc

<b>docx</b>	.docx
<b>bmp</b>	.bmp
<b>pdf</b>	.pdf

If you left this field empty, "docx" would be taken as default type.

### 2.1.1.4 PrintTo

This field gives you the possibility to define the path of a network printer. If AutoMerge can find an available printer by following this path, the document will be printed out after the creation.

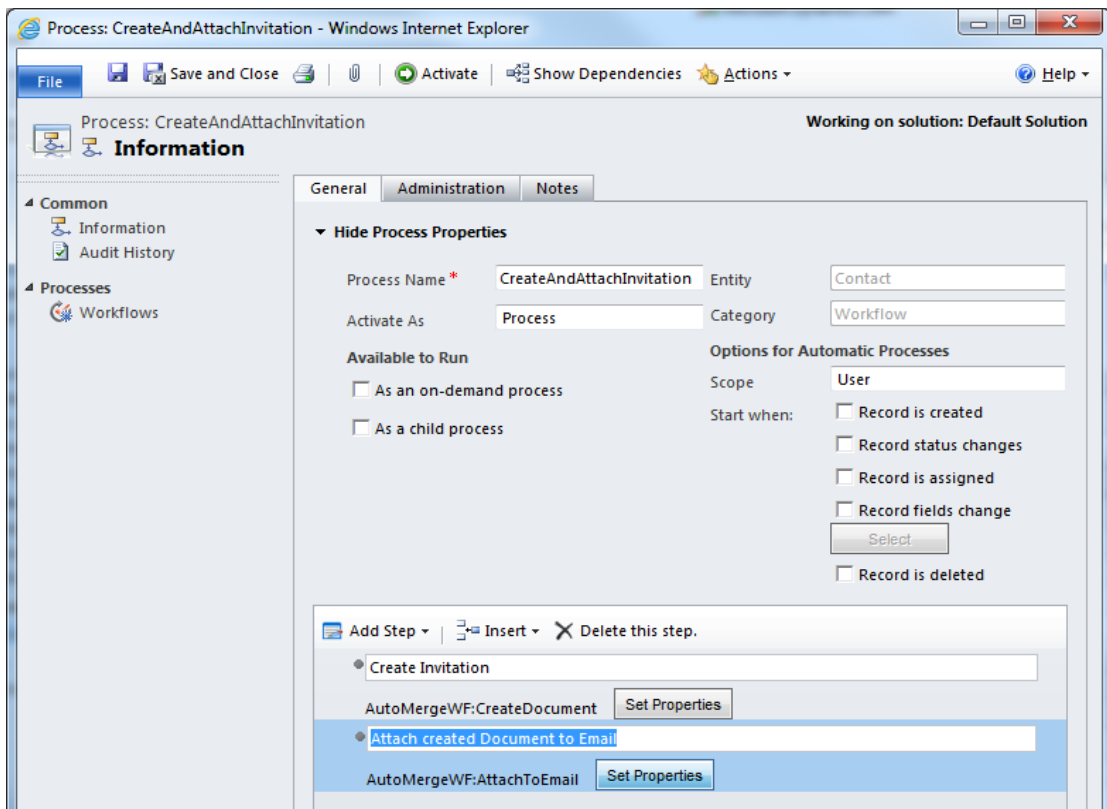
### 2.1.1.5 SaveOnlyIntoTemp

If this option box is set to "True" the generated document will only be stored in the "MSCRM-ADDONS.com User/Temp Settings" of CRM. If it is set to "False" the document will be stored in a file share or SharePoint additionally, depending on the adjustment of the DocumentsCorePack Server.

### 2.1.2 AttachToEmail

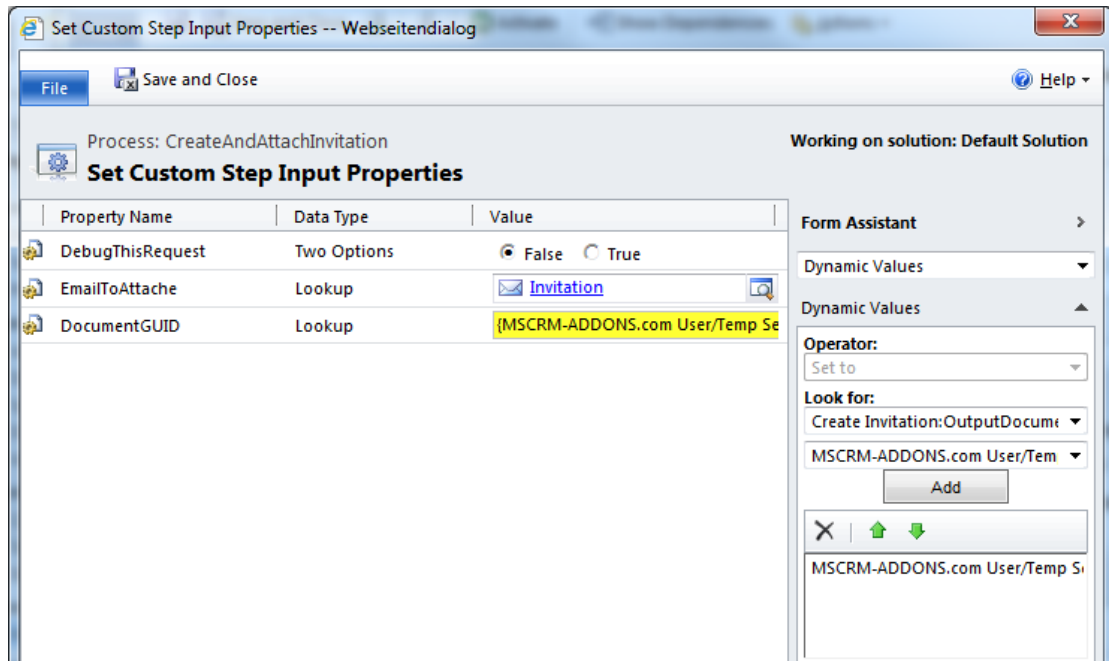
Select this option to attach a created document to an existing email. This step is often used in combination with the "SendEmail"-step, described later.

**Important:** If the file type of the generated document which you want to attach is "html" its content will be copied into the email body. If it is any other file type the generated document will be added as attachment to the email.



First give your new step a meaningful name.

Then hit [Set Properties] to define the settings:



The "AttachToEmail" functionality provides the following properties:

### 2.1.2.1 DebugThisRequest

If this box is set to "True" the AutoMerge Plugin will write debug information while executing this request. This is only required if this part of the process doesn't work correctly. Due to the fact that it will slow down the whole process, we recommend setting it to "False" in normal cases.

### 2.1.2.2 EmailToAttach

This lookup can be used to define the email to which the created document should be attached.

You have the possibility to select an existing email. But you can refer to one in this workflow earlier created email as well.

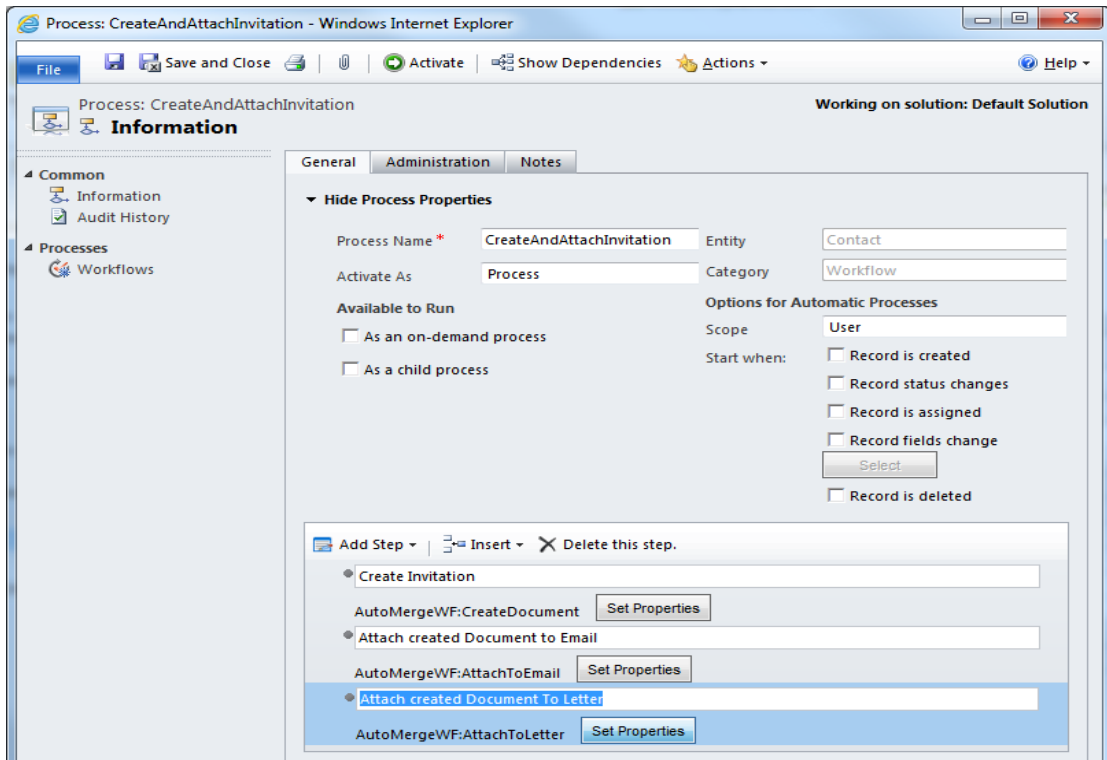
### 2.1.2.3 DocumentGUID

This lookup provides the possibility to select the document which should be attached.

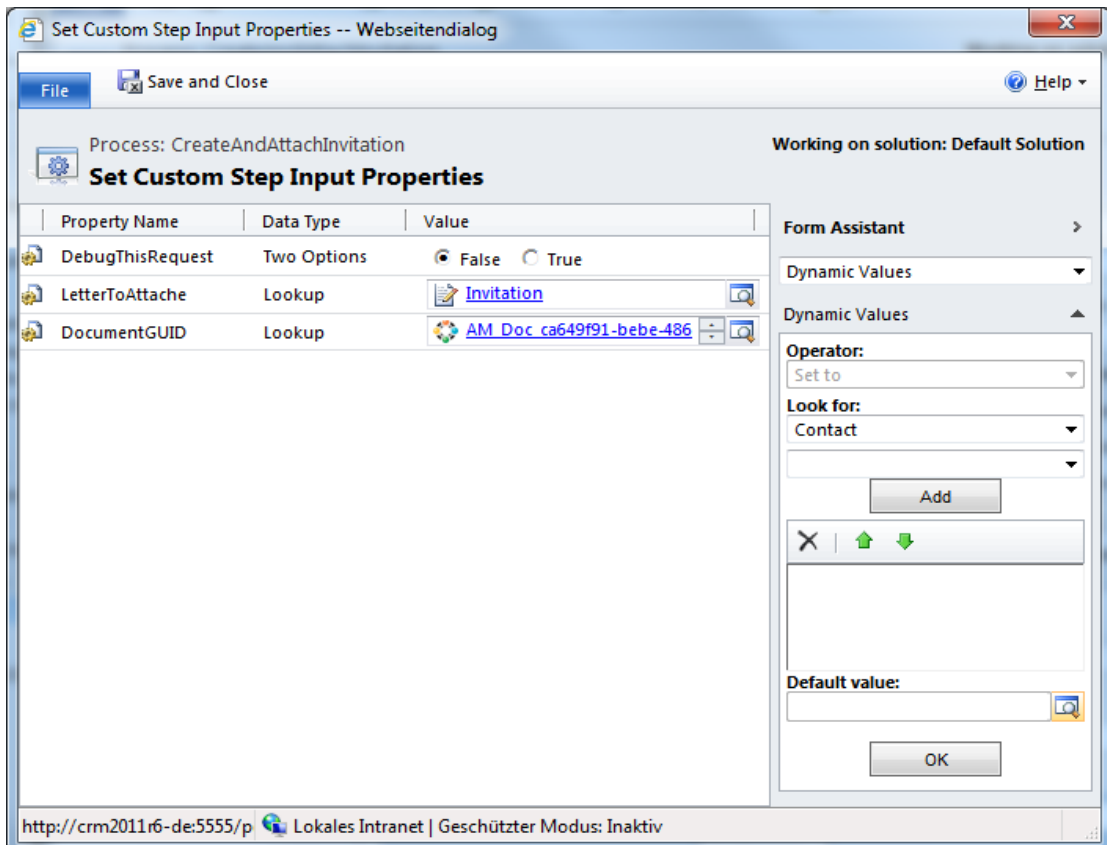
The handling of this property is similar to the above one. You can select an existing document, by clicking on the lookup button. And you can also use a document, created in this workflow before.

### 2.1.3 AttachToLetter

Select this option to attach a created document to an existing letter.



First give your new step a meaningful name.  
Then hit [Set Properties] to define the settings:



The "AttachToLetter" functionality provides the following properties:

### **2.1.3.1 DebugThisRequest**

If this box is set to "True" the AutoMerge Plugin will write debug information while executing this request. This is only required if this part of the process doesn't work correctly. Due to the fact that it will slow down the whole process, we recommend setting it to "False" in normal cases.

### **2.1.3.2 LetterToAttach**

This lookup can be used to define the letter to which the created document should be attached.

You have the possibility to select an existing letter. But you can refer to one in this workflow earlier created letter as well.

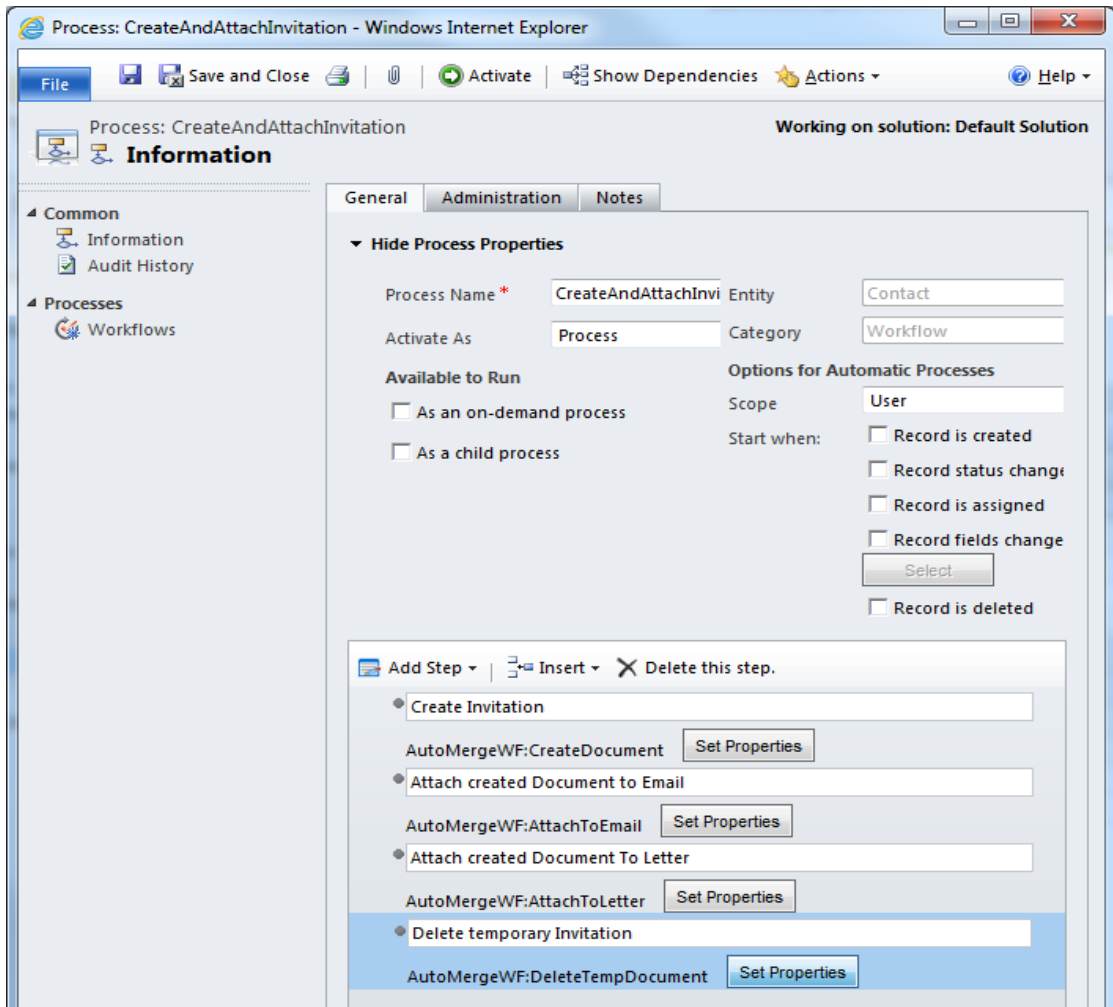
### **2.1.3.3 DocumentGUID**

This lookup provides the possibility to select the document which should be attached.

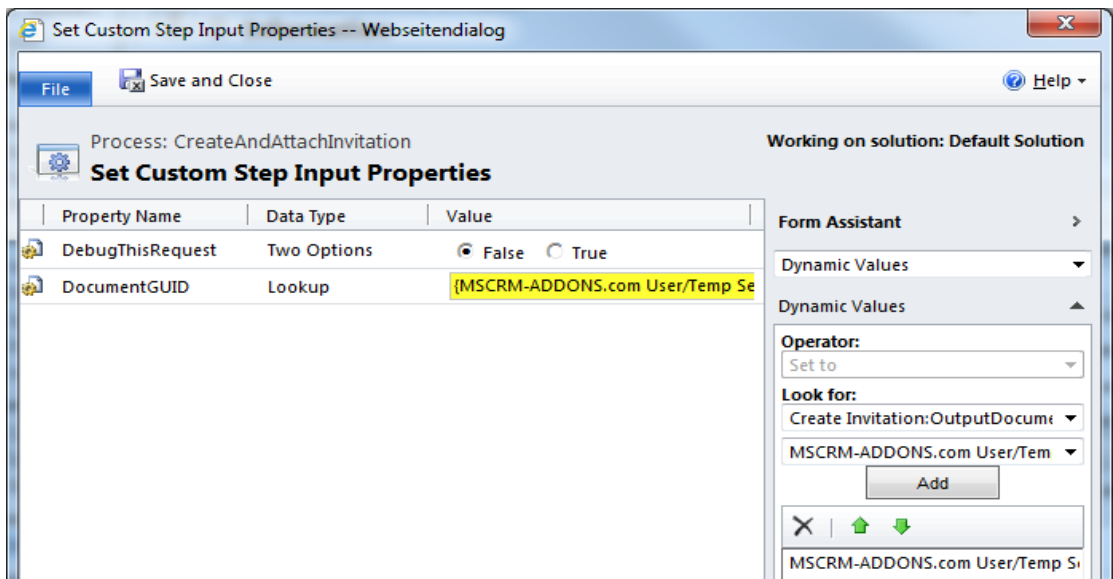
The handling of this property is similar to the above one. You can select an existing document, by clicking on the lookup button. And you can also use a document, created in this workflow before.

### **2.1.4 DeleteTempDocument**

Select this option to delete an existing document from the "MSCRM-ADDONS.com User/Temp Settings" entity.



First give your new step a meaningful name.  
Then hit [Set Properties] to define the settings:



The "DeleteTempDocument" functionality provides the following properties:

### 2.1.4.1 DebugThisRequest

If this box is set to "True" the AutoMerge Plugin will write debug information while executing this request. This is only required if this part of the process doesn't work correctly. Due to the fact that it will slow down the whole process, we recommend setting it to "False" in normal cases.

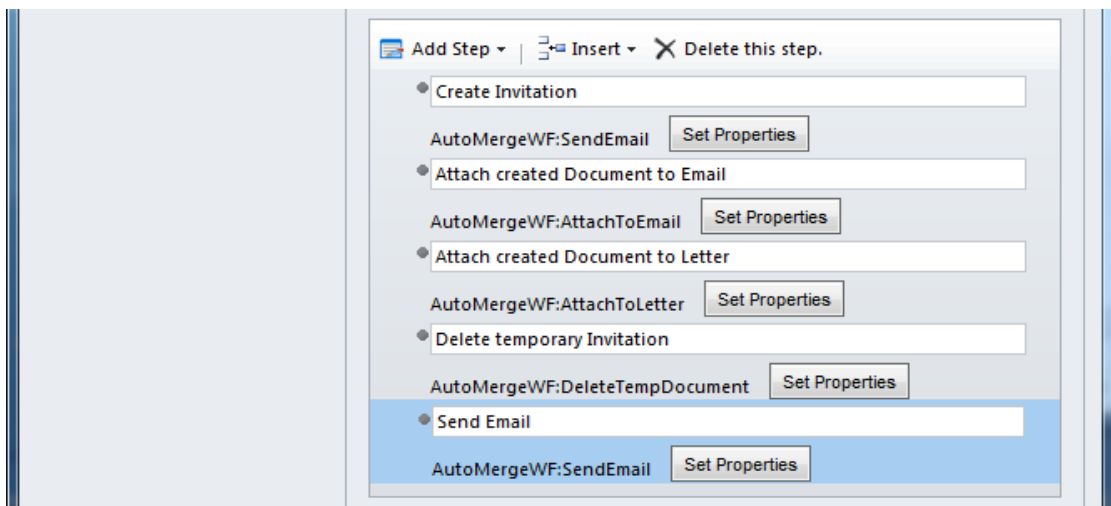
### 2.1.4.2 DocumentGUID

This lookup provides the possibility to select the document which should be removed.

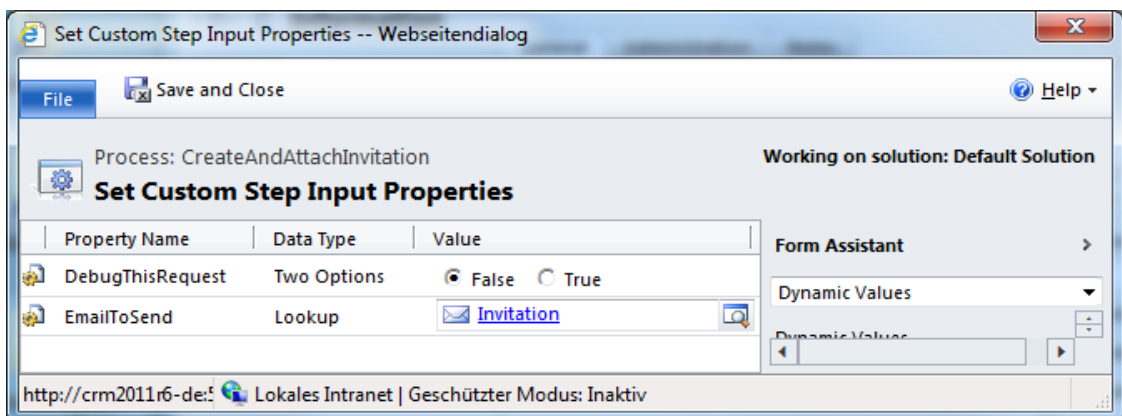
You can select an existing document, by clicking on the lookup button. And you can also use a document, created in this workflow before.

### 2.1.5 SendEmail

Use this step to send an existing email.



First give your new step a meaningful name. Then hit [Set Properties] to define them.



The "SendEmail" functionality provides the following properties:

### 2.1.5.1 DebugThisRequest

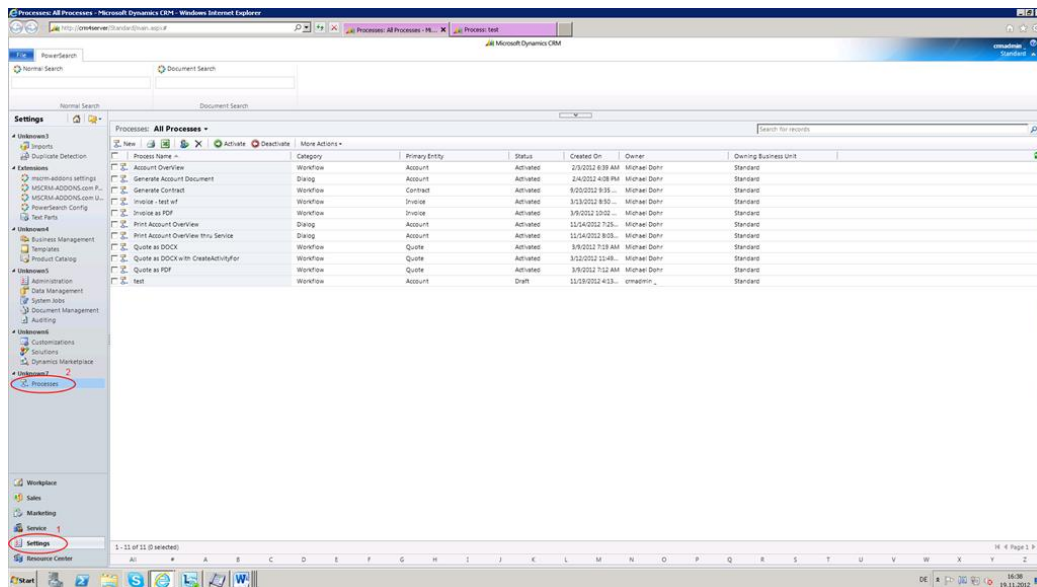
If this box is set to "True" the AutoMerge Plugin will write debug information while executing this request. This is only required if this part of the process doesn't work correctly. Due to the fact that it will slow down the whole process, we recommend setting it to "False" in normal cases.

### 2.1.5.2 EmailToSend

This lookup field can be used to define the email which should be sent. You have the possibility to select an existing email. But you can refer to one in this workflow earlier created email by using the "Form Assistant" as well.

## 2.2 Workflow (CRM Online)

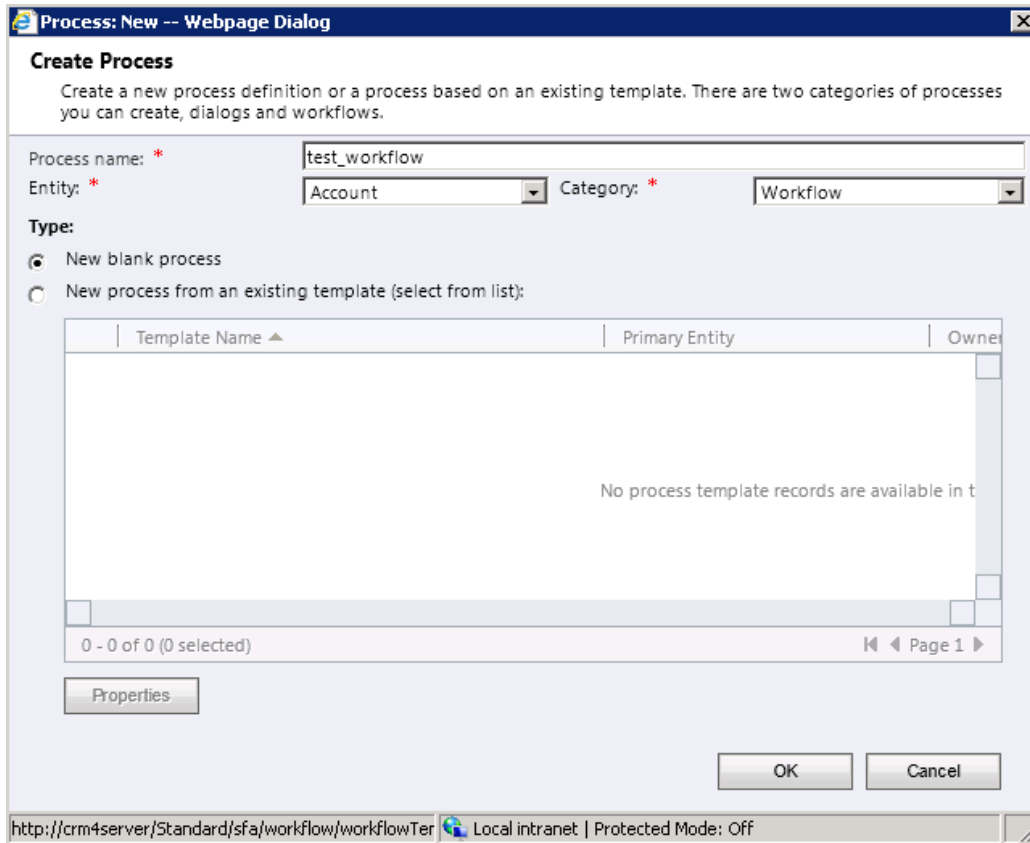
First of all, start in the settings of your CRM system (see screenshot ellipse 1) and click on 'Processes' in the sitemap (see screenshot ellipse 2).



Screenshot: 'Processes'-area in CRM settings

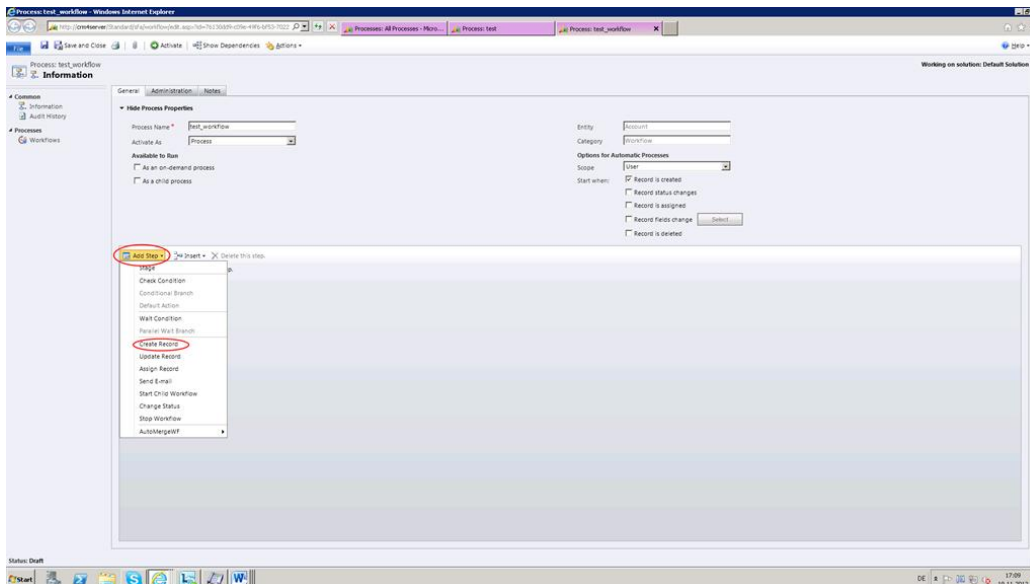
Then click on 'New' to create a new workflow. A webpage dialog pops up (see screenshot below). Type in a name, determine an entity and choose 'Workflow' as the process category. Afterwards, click on 'OK'.





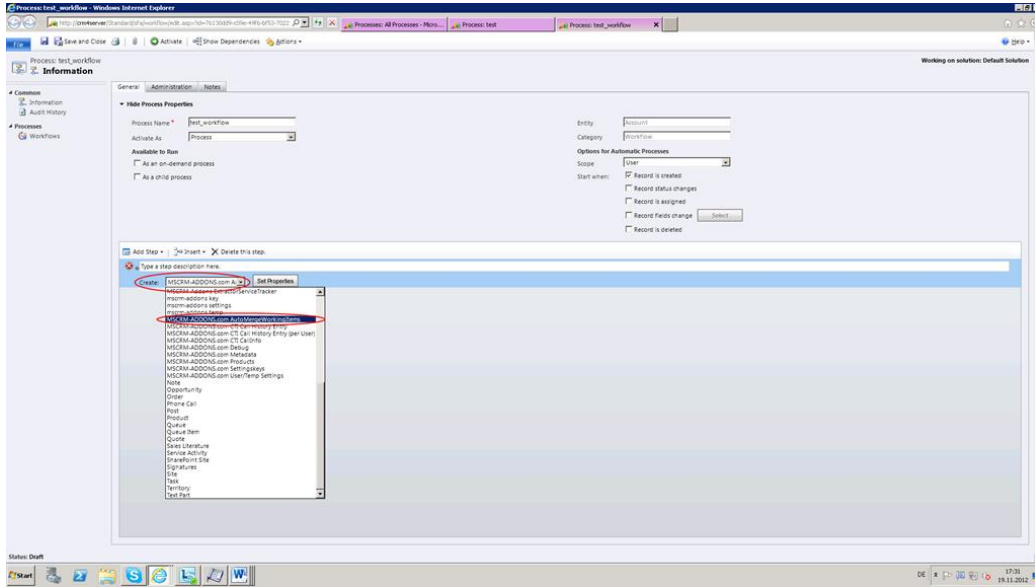
Screenshot: Webpage dialog to create a new workflow/dialog

After clicking on 'OK', you will see the following window. Start to define and add the steps you would like to have in your workflow. If you would like to e.g. create the document as a first step of your workflow, click on the 'Add Step'-drop-down menu and select 'Create Record'. (see screenshot below)



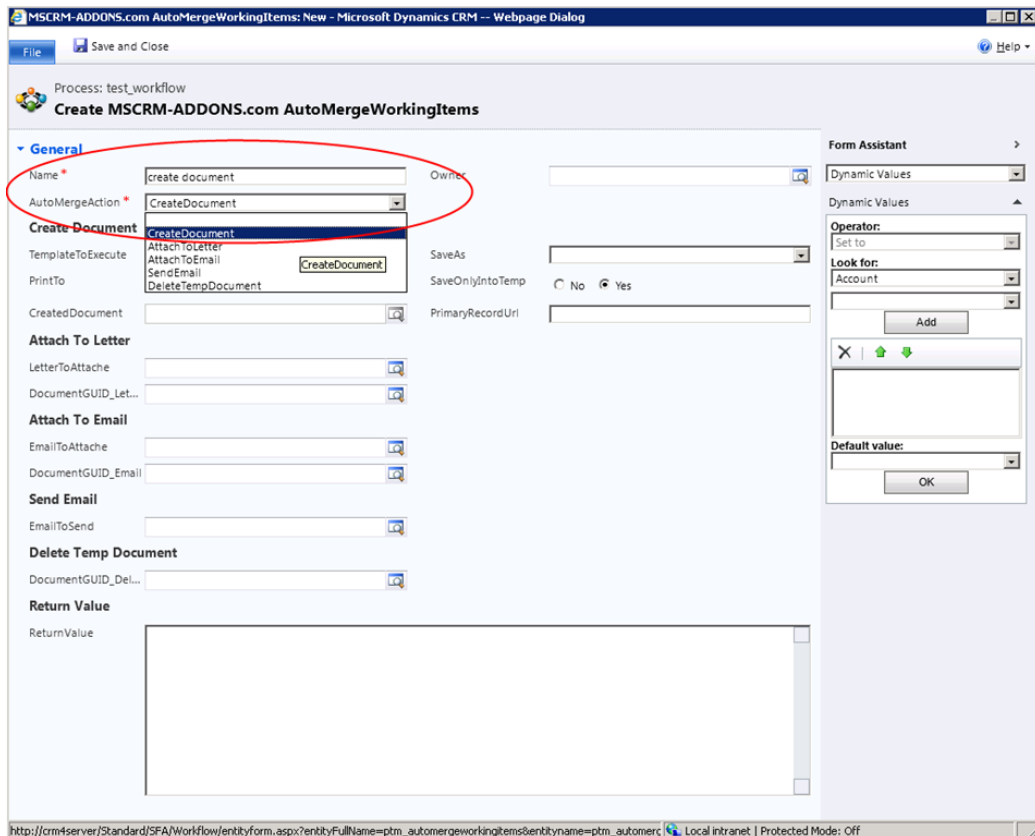
Screenshot: window for workflow-configuration

Now, the first step is added to your workflow. Type in a description of the step, e.g. create document. Afterwards, open the drop-down menu within this first step, select 'MSCRM-ADDONS.com AutoMergeWorkingItems' and click on 'Set Properties'. (see screenshot below)



Screenshot: window for workflow configuration, creation of first workflow-step 'CreateDocument'

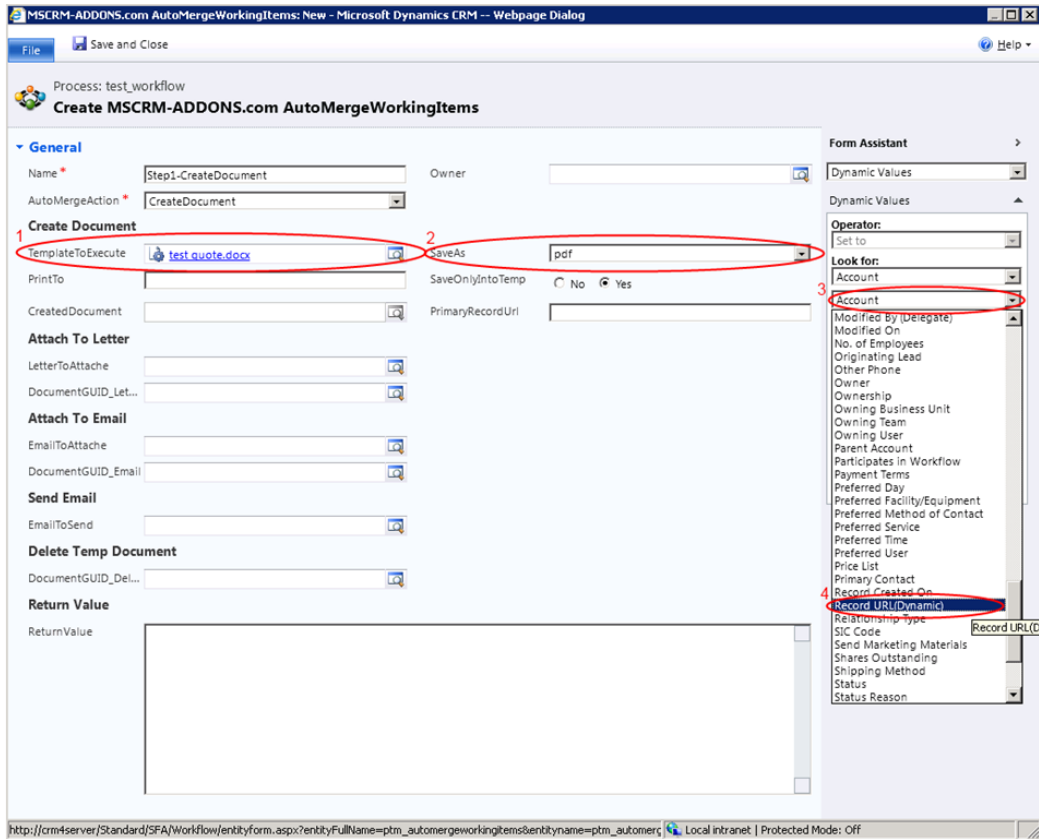
The following window will open to configure the first step of your workflow. (see screenshot below) Type in a name and define the AutoMerge-action. In our example, we select the action 'CreateDocument'.



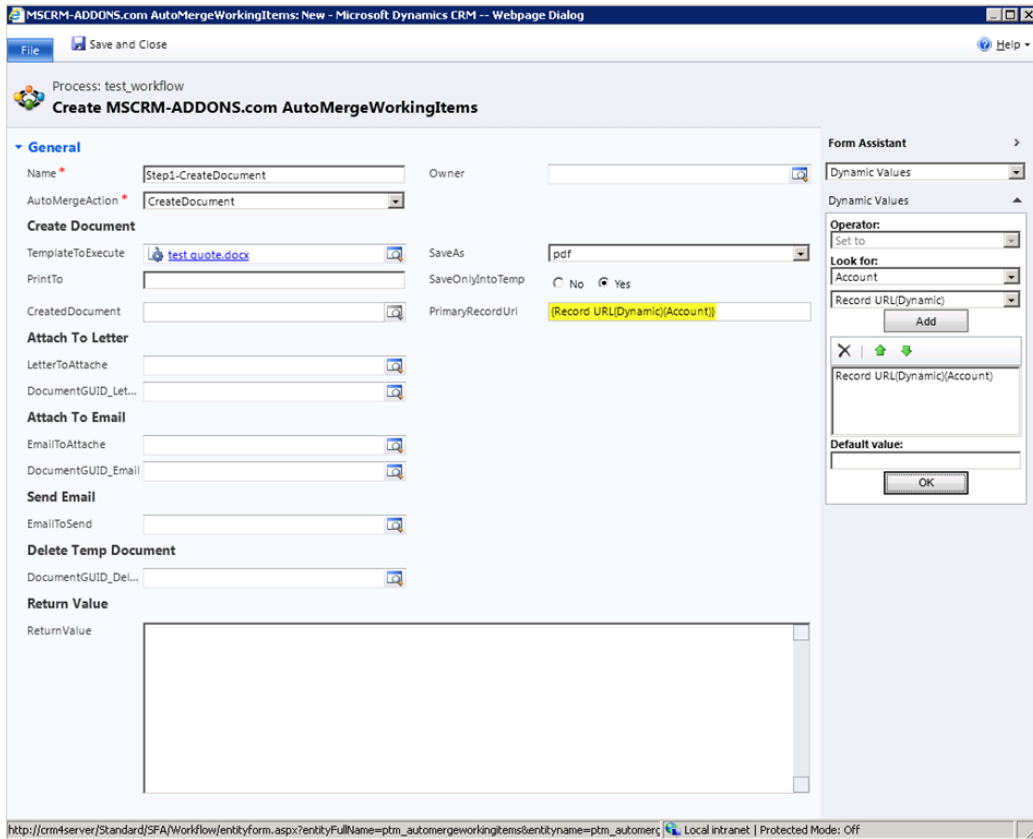
Screenshot: window for workflow-step configuration, definition of a name and of the AutoMergeAction 'CreateDocument'

After that, choose the template to be used within the workflow (see screenshot ellipse 1) and the file format the document should be saved as (see screenshot ellipse 2).

Furthermore, it is very important to insert the 'PrimaryRecordUrl'. For that, set the cursor in the 'PrimaryRecordUrl'-field and go to the 'Look for'-area within the form assistant on the right side. Select 'Record URL(Dynamics)' from the second drop-down-menu (see screenshot below, ellipse 3 and 4), click on 'Add' and then on 'OK'. After that, the 'PrimaryRecordUrl'-field is filled out automatically. (see screenshot below, colored in yellow) Click on 'Save and Close'.

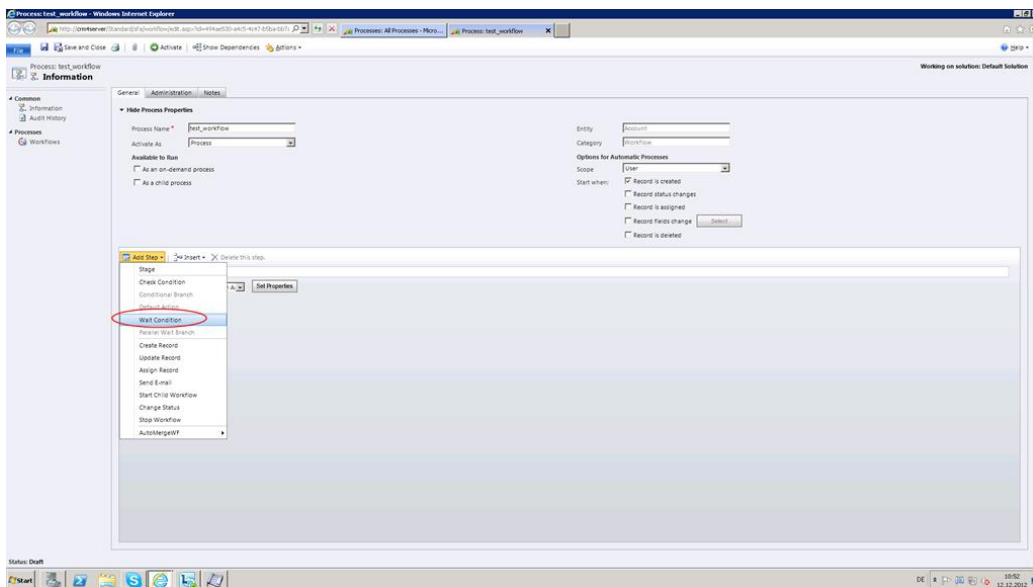


Screenshot: window for workflow-step configuration, definition of the template to be used in the workflow, the file format the document should be saved as and the PrimaryRecordUrl



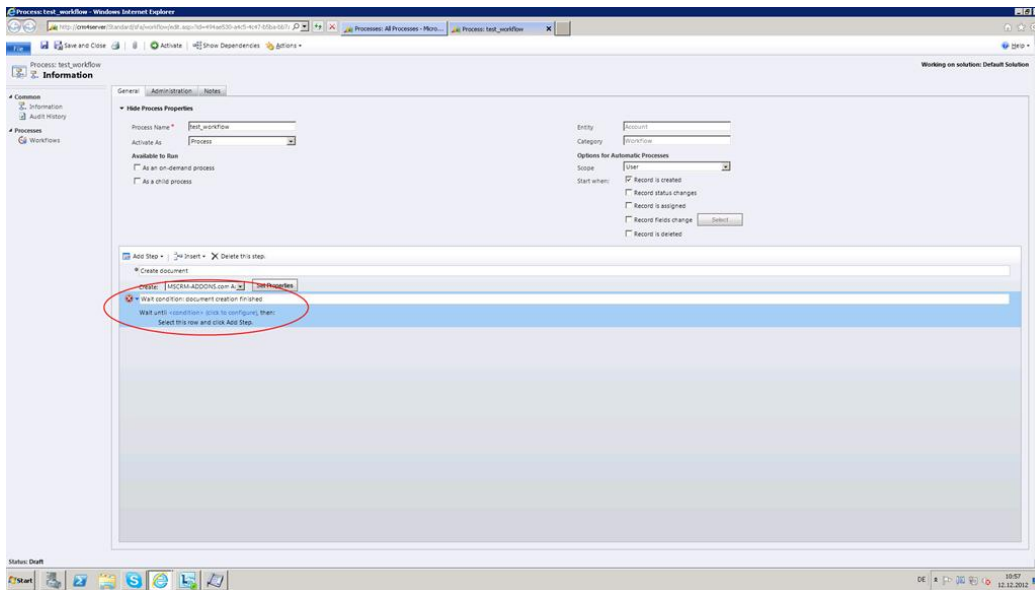
Screenshot: window for workflow-step configuration, configuration of first workflow-step finished

The first step of your workflow is now added and fully configured. In case you want to stop your workflow at this point, you can click on 'Save and Close' and finish here. In case you want to add further steps to your workflow, define a condition to be fulfilled before adding further steps. For example, if you want to create a letter-activity with the previously generated document as an attachment, you need to make sure that the document creation is completed before attaching the document to the letter activity. To do so, open the 'Add-Step' drop-down menu again and select 'Wait Condition'. (see screenshot below, red ellipse)



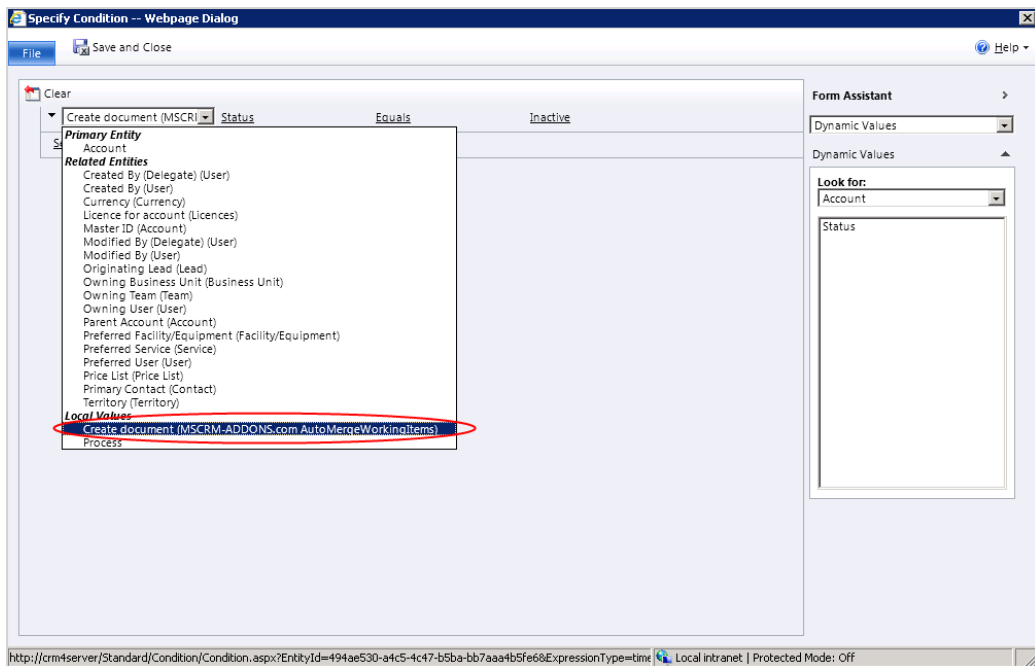
Screenshot: window for workflow configuration, 'Wait condition'-step added

The step is added to the workflow. Type in a step description and click on '<condition> (click to configure)'. (see screenshot below)

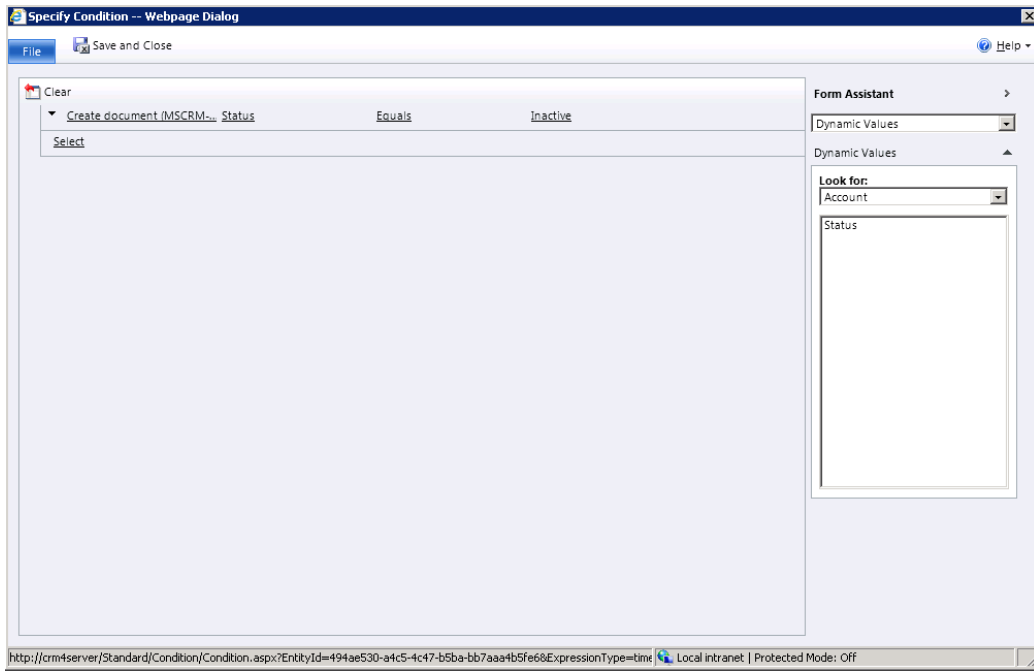


Screenshot: window for workflow configuration, 'Wait Condition'-step added

After that, a window pops up. In this window, you can define the condition to be fulfilled for workflow proceeding. In our case, we select 'Create document (MSCRM-ADDONS.com AutoMergeWorkingItems)' from the first drop-down menu, 'Status' from the second drop-down menu, 'Equals' from the third drop-down menu and 'Inactive' from the fourth drop-down menu. (see screenshots below). Click on save and close. Now, you have determined that step 2 of your workflow (in our example to attach the created document to a letter-activity) will only be executed if the first step, namely the document generation, has finished successfully.

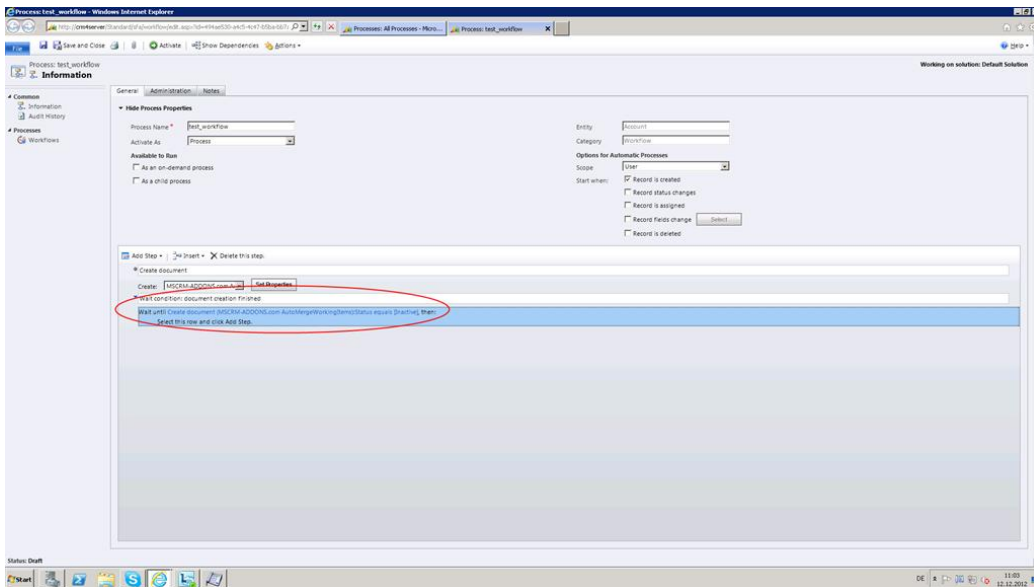


Screenshot: window to configure 'Wait Condition'-step



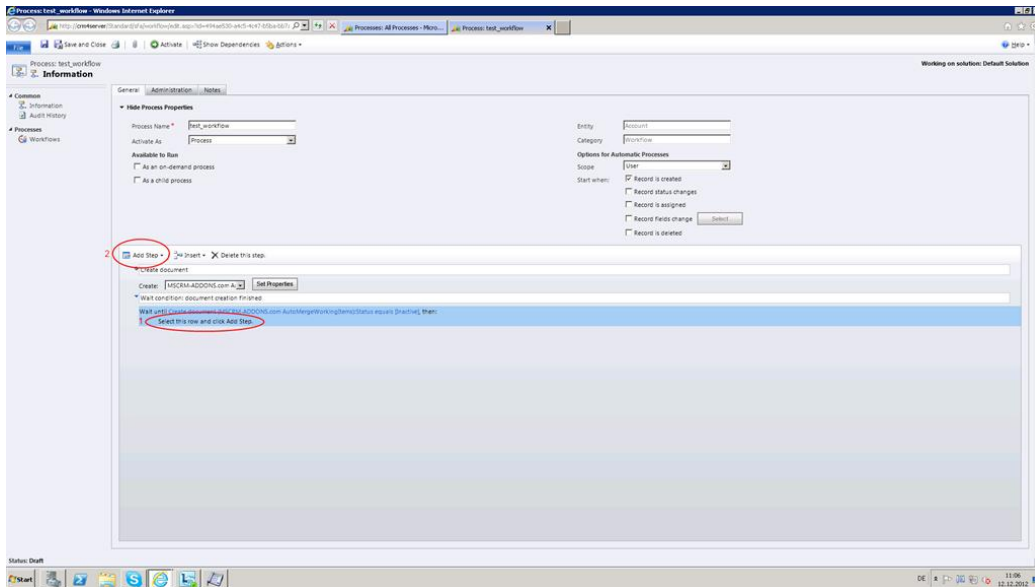
Screenshot: window to configure 'Wait Condition'-step

Afterwards, your workflow configuration will look like in the following screenshot.



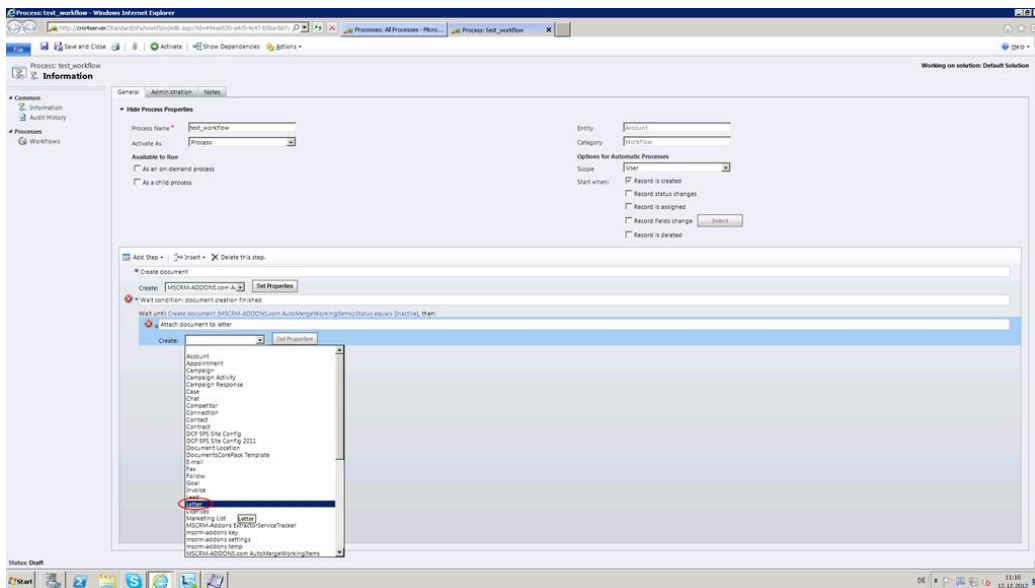
Screenshot: window for workflow configuration, 'Wait condition'-step added and configured

To add another step, e.g. to create a letter-activity, click on 'Select this row and click Add Step' (see screenshot ellipse 1) and afterwards on 'Add Step' (see screenshot, ellipse 2)



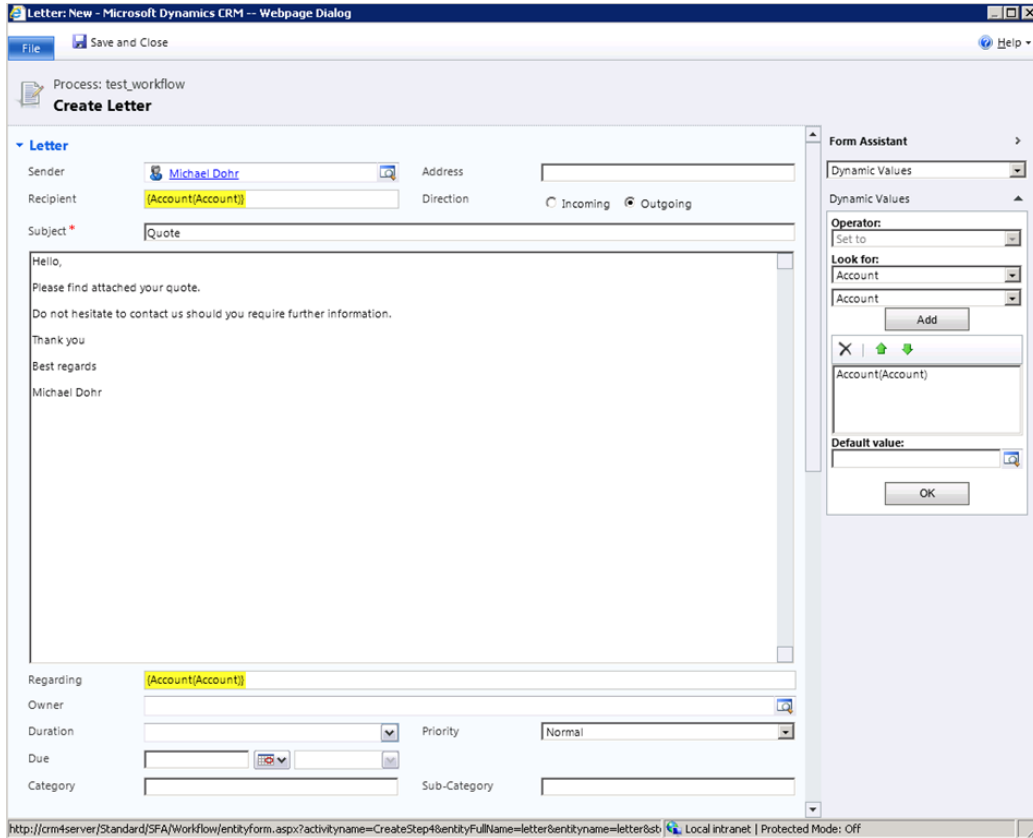
Screenshot: window for workflow configuration, add workflow-step 2 'letter'

Then, select 'Create Record' from the drop-down menu. The new step is now added to your workflow and ready for configuration. Type in a step description (e.g. Attach document to letter), open the drop-down menu within this second step and select 'Letter'. (see screenshot below)



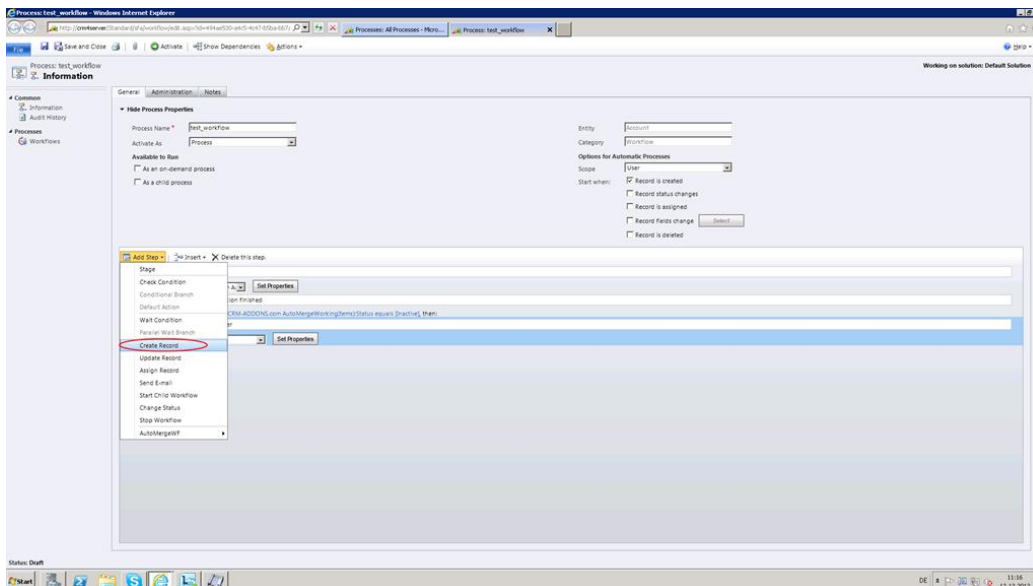
Screenshot: window for workflow configuration, workflow-step 'letter' added

Afterwards, click on 'Set Properties' and a letter-activity-window will open. (see screenshot below) Within this window, define a sender, a subject and type in your letter-text. Then, set the cursor in the 'Recipient'-field to define the recipient. To do so, go to the 'Look for'-area within the form assistant on the right side. Select 'Account' in both drop-down-menus, click on 'Add' and then on 'OK'. Now the 'Recipient'-field is filled out correctly (see screenshot below, colored in yellow).



Screenshot: window to configure letter-activity

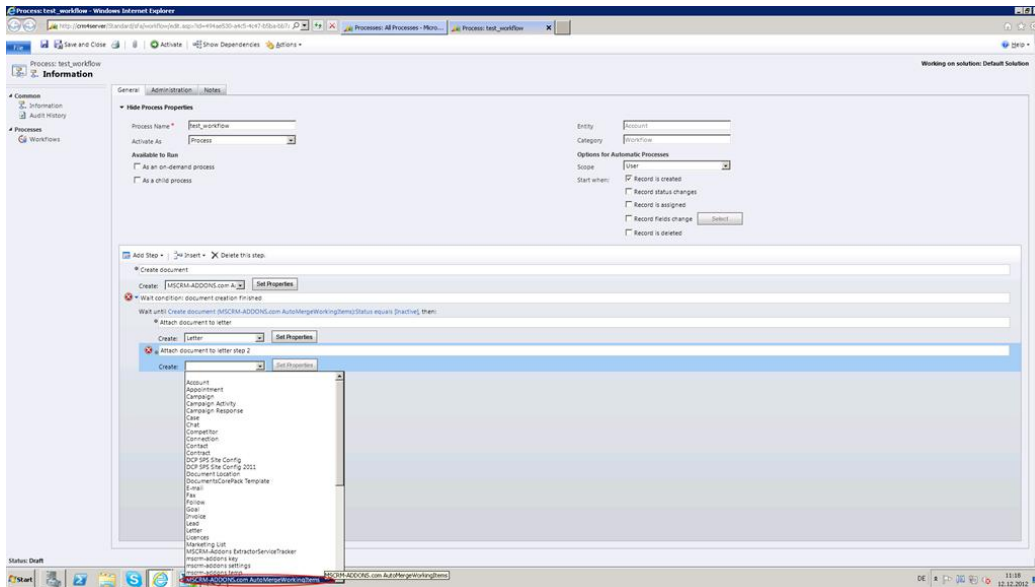
Click on 'Save and Close'. Now you are back in the general workflow-window again and you can see the added and completely configured letter-activity. In a next step, you have to define that the previously created document should be added to this letter-activity. For that, click on 'Add Step' and select 'Create Record' from the drop-down menu. (see screenshot below)



Screenshot: window for workflow configuration, add 'AttachToLetter'-step

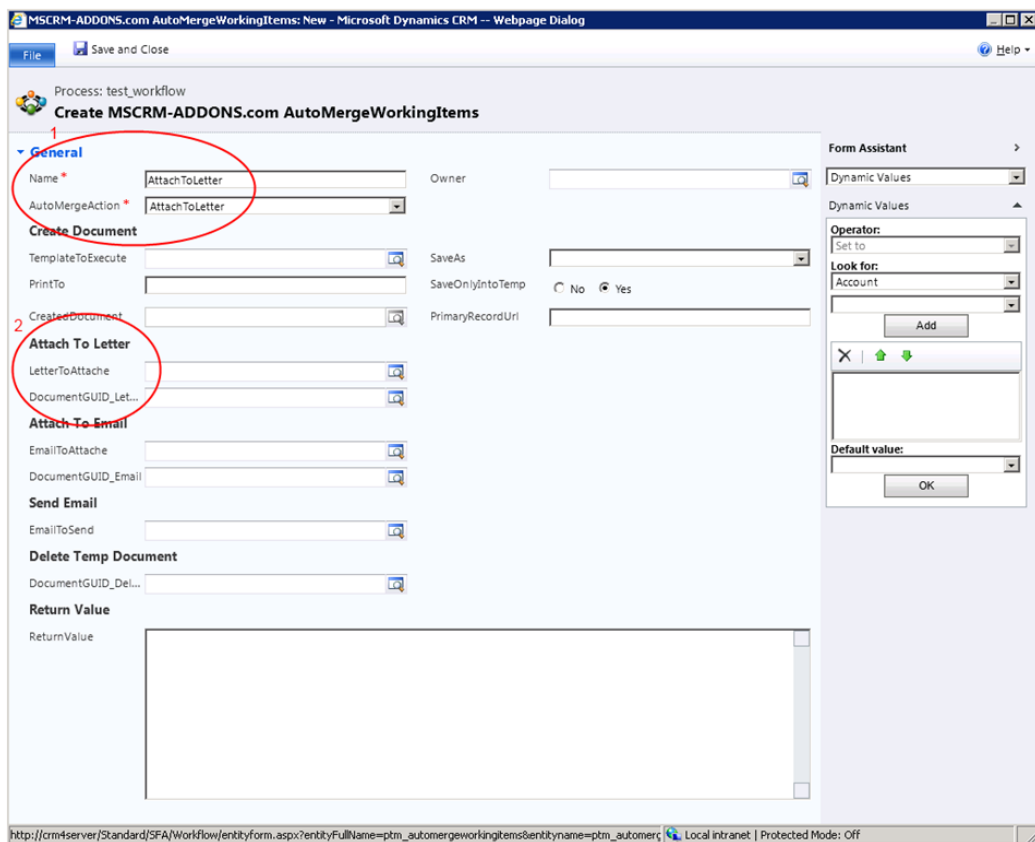
Type in a step description and open the drop-down menu within this step. Select 'MSCRM-ADDONS.com AutoMergeWorkingItems'. (see screenshot below) Then, click on 'Set Properties'.





Screenshot: window for workflow configuration, add 'AttachToLetter'-step

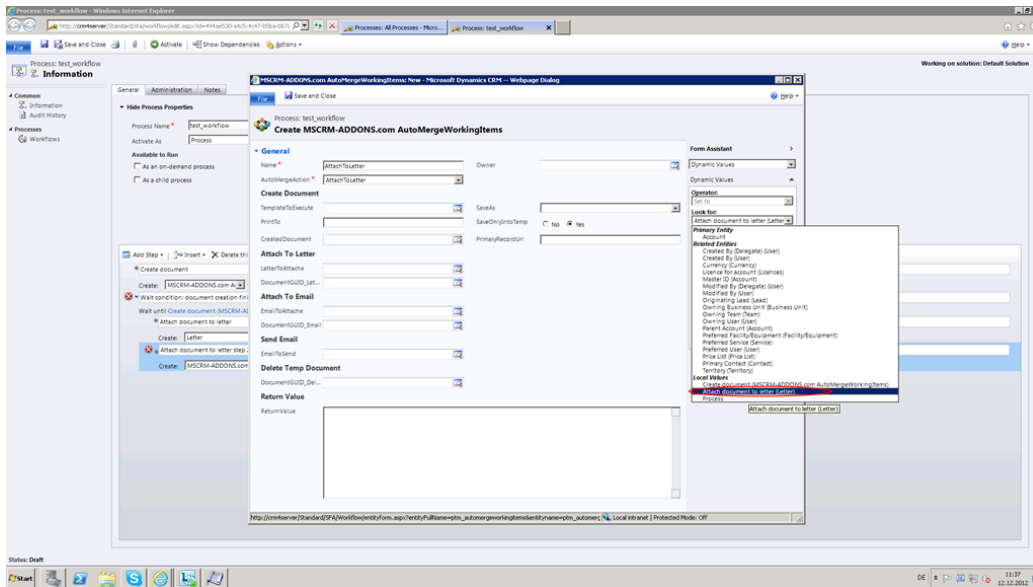
A window will pop up to configure the 'AttachToLetter'-workflow-step. Put a name and define the AutoMerge action (in this example choose 'AttachToLetter', see screenshot, ellipse 1) Within the 'Attach to Letter'-section, determine the letter-activity to which the created document should be attached to (see screenshot 'LetterToAttach'-field, ellipse 2) and the document which should be attached (see screenshot 'DocumentGUID\_Letter'-field, ellipse 2).



Screenshot: window to configure workflow-step, configure 'AttachToLetter'-step

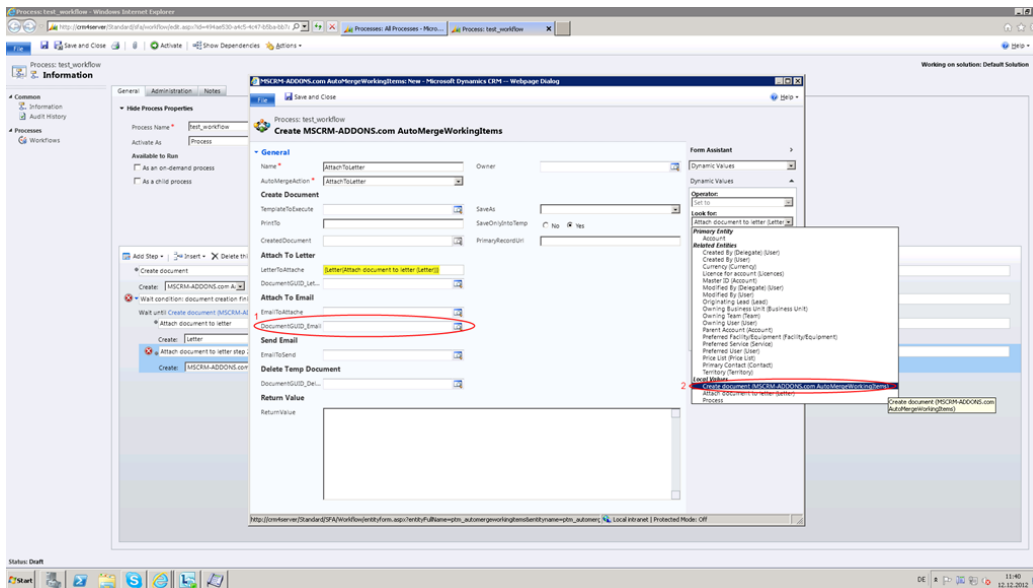
For determining the letter-activity the document should be attached to, set the cursor in the 'LetterToAttach'-field in the 'Attach To Letter'-area (see screenshot, ellipse 1) and select the correct letter-activity from the drop-down menu in the

'Look For'-area within the form assistant on the right side. (see screenshot, ellipse 2). After that, click on 'Add' and 'OK'.



Screenshot: window to configure workflow-step, configure 'AttachToLetter'-step

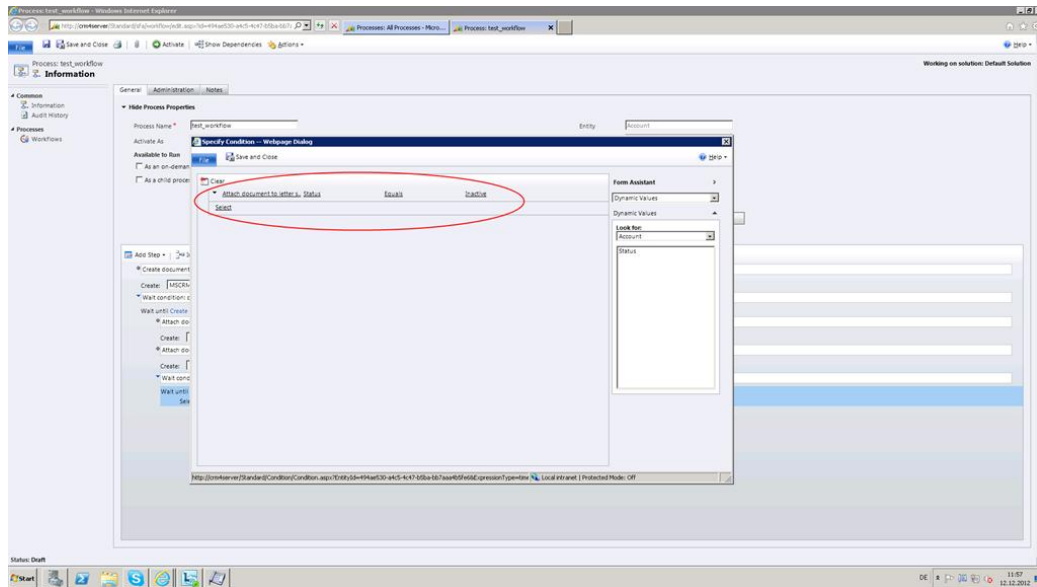
To determine the document to be attached, set the cursor in the 'DocumentGUID\_Letter'-field (see screenshot, ellipse 1) and select the correct document from the drop-down box in the 'Look For'-area within the form assistant on the right side. (see screenshot, ellipse 2) Click on 'Add' and 'OK'.



Screenshot: window to configure workflow-step, configure 'AttachToLetter'-step

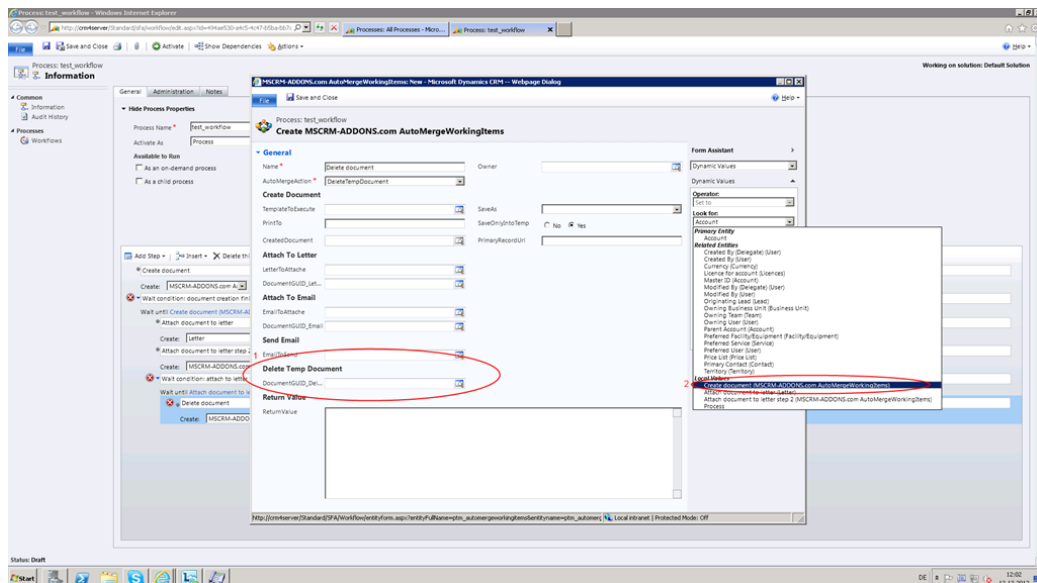
You have now completed the configuration of this step. Click on save and close. In case you want to stop your workflow at this point, you can click on 'save and close' within the general workflow-configuration-window and finish here. In case you want to add further steps to your workflow, you have to define a condition to be fulfilled before you add further workflow-steps. In that case, open the 'Add-Step' drop-down menu again and select 'Wait Condition'. Click on '<condition>' (click to configure)' and a window will pop up. In this window, define which condition has to be fulfilled for further workflow proceeding. In our example, we want the workflow to proceed when the created document has been attached to

the letter-activity. In our case, we select 'Attach document to letter step 2 (MSCRM-ADDONS.com AutoMergeWorkingItems)' from the first drop-down menu, 'Status' from the second drop-down menu, 'Equals' from the third drop-down menu and 'Inactive' from the fourth drop-down menu. Click on 'Save and Close'.



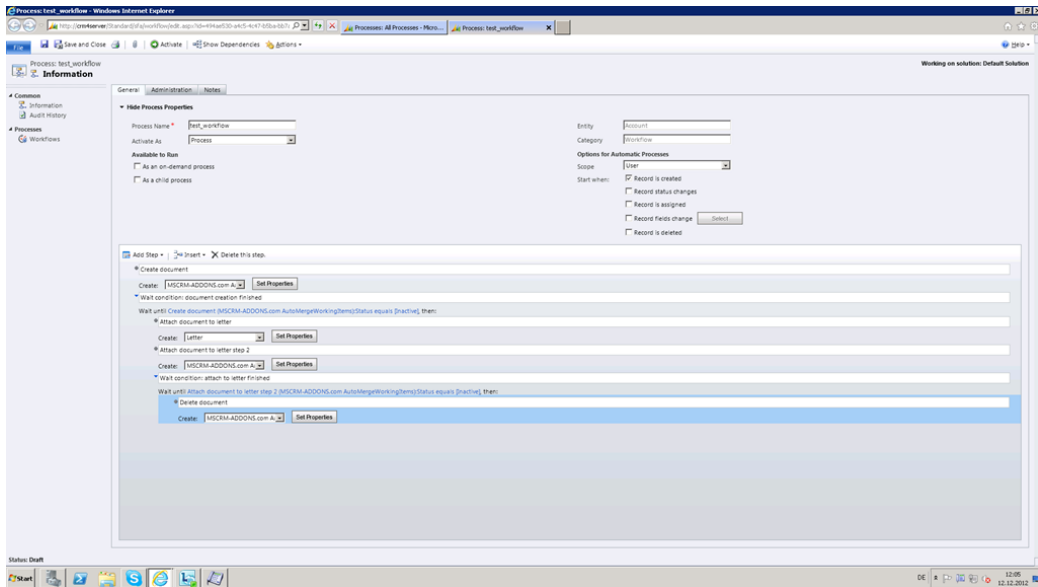
Screenshot: window to configure 'Wait Condition'-step

Now you can add another workflow-step. In our example, we want the document to be deleted after it has been attached to the letter-activity. To do so, click on 'Select this row and click' and open the 'Add Step'-drop-down menu. Select 'Create Record'. Afterwards, type in a step-description, choose 'MSCRM-ADDONS.com AutoMergeWorkingItems' from the drop-down box within the step and click on 'Set Properties'. A window will pop up in which you can determine that the created document should be deleted after it has been attached to the letter-activity. For that, put a name and an AutoMerge activity (in our example 'DeleteTempDocument'). Afterwards, click in the 'DocumentGUID\_Delete'-field within the 'Delete Temp Document'-area (see screenshot, ellipse 1) and select the document to be deleted from the drop-down box in the 'Look For'-area within the form assistant. (see screenshot, ellipse 2)



Screenshot: window to configure workflow-step, configure 'Delete Temp Document'-step

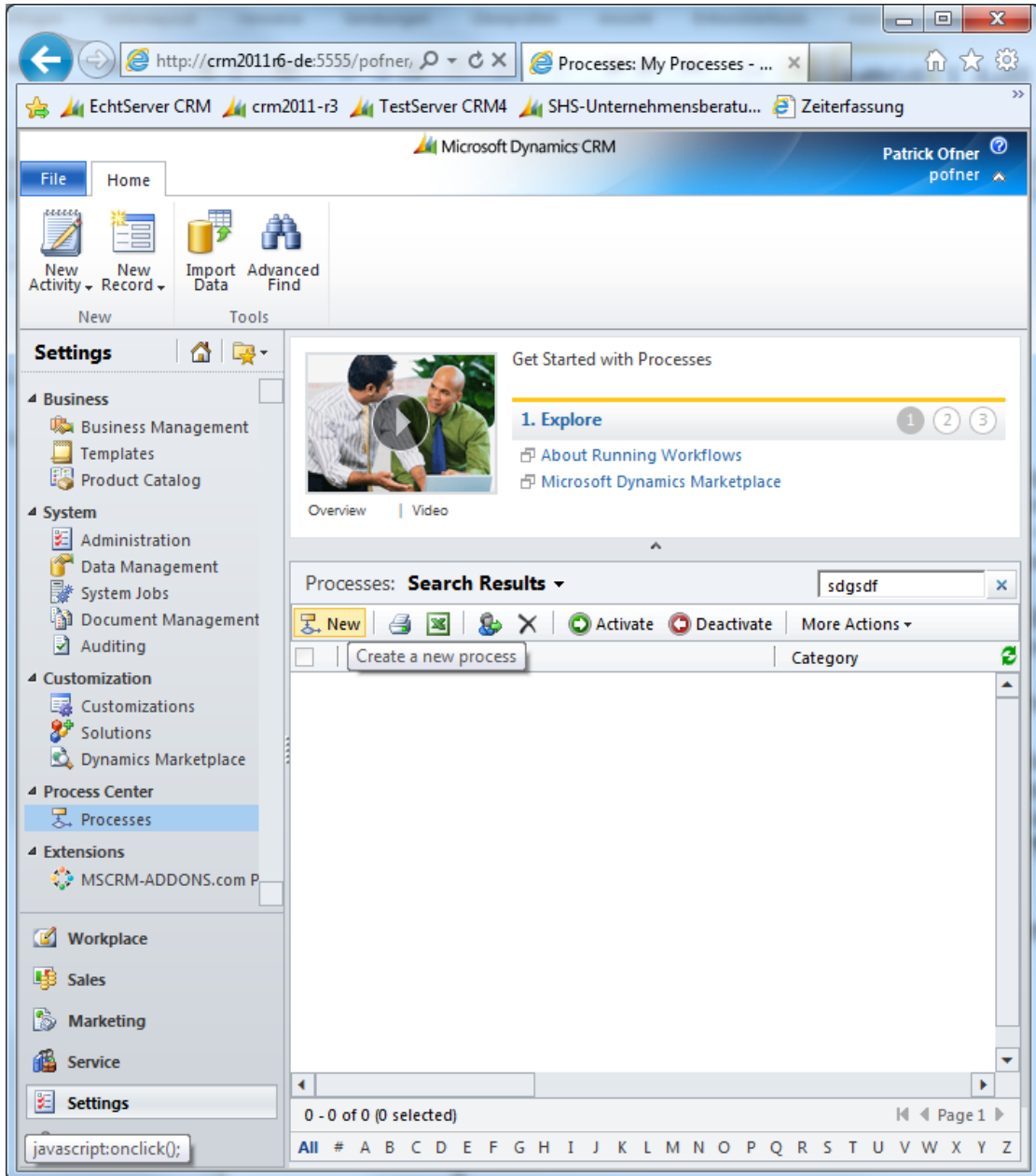
Click on 'Save and Close'. After that, you have finished your workflow configuration and you can click on 'Save and Close'.



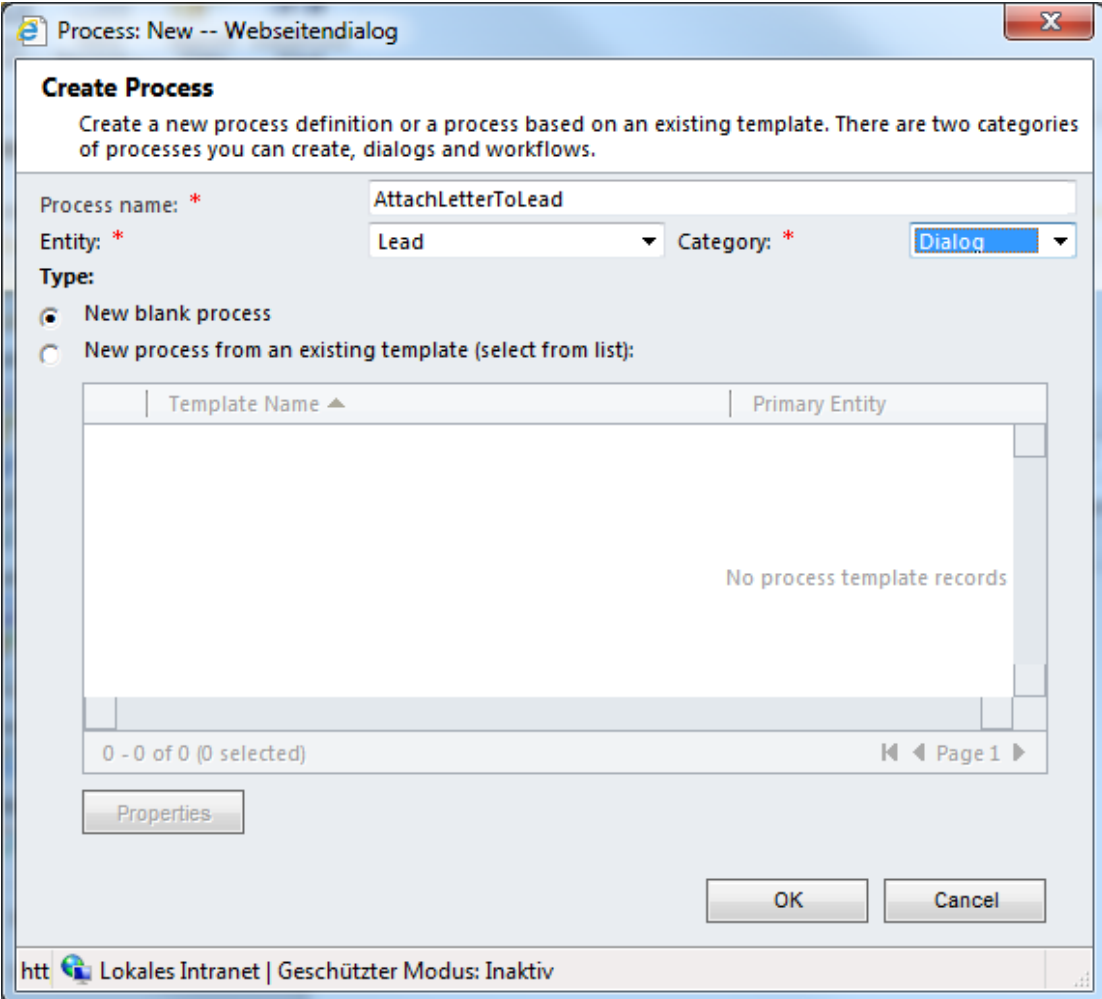
Screenshot: window to configure workflow, workflow-configuration finished

## 2.3 Dialog

From a dialog you can use the same AutoMerge steps as from a workflow. This chapter shows how you can access these functionalities. Within CRM open Settings -> Processes



The next step is creating a new dialog. This works nearly the same way as creating a new workflow. Hit [New] as shown in the screenshot. Thereupon the following window will appear:



**Create Process**

Create a new process definition or a process based on an existing template. There are two categories of processes you can create, dialogs and workflows.

Process name: \* AttachLetterToLead

Entity: \* Lead Category: \* Dialog

Type:

New blank process

New process from an existing template (select from list):

Template Name ▲	Primary Entity
No process template records	

0 - 0 of 0 (0 selected) Page 1

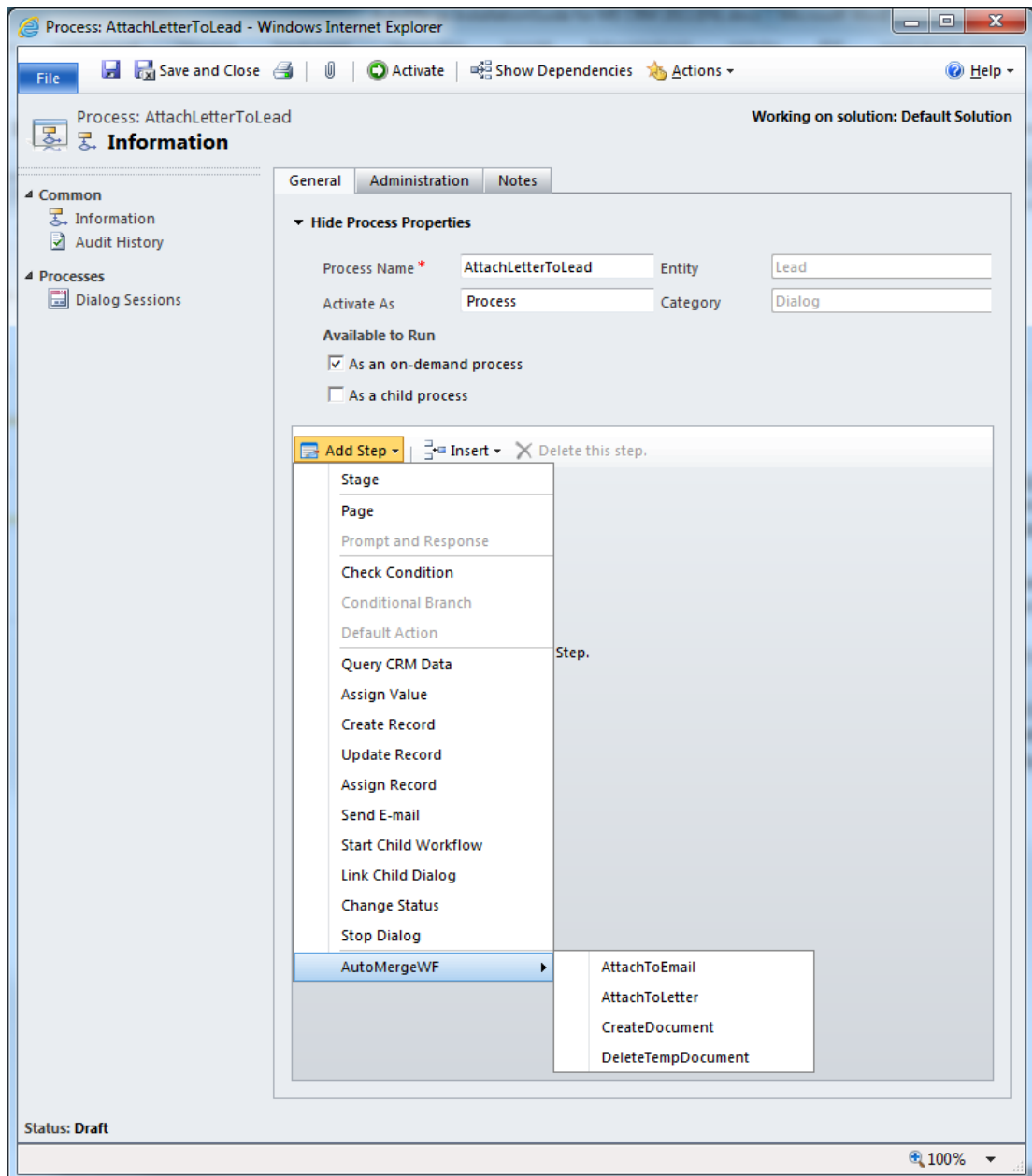
Properties OK Cancel

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Give the new dialog a name, define the starting entity and select "Dialog" in the drop down box. To start with a new dialog, select "New blank process".

Hit [OK] to proceed.

Then the dialog workflow configuration window will appear.



Here you can see that the AutoMerge add-in provides the same steps for dialogs.

Due to the fact that these work totally the same way as for workflows, they aren't described a second time here. Please see chapter: "[2.2.1 CreateDocument](#)" downwards for more information regarding the steps.



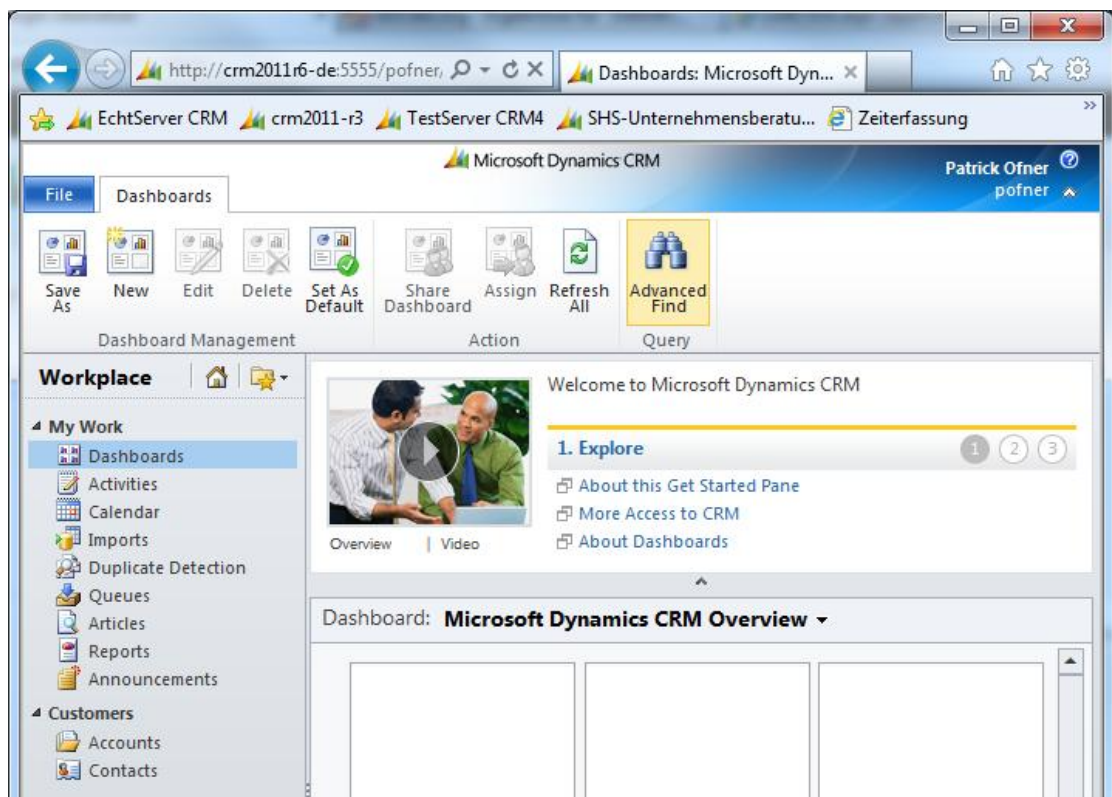
### 3 Temporarily Document

Every time when you create a new document by using the "CreateDocument" step, it will be stored in the "MSCRM-ADDONS.com User/Temp Settings".

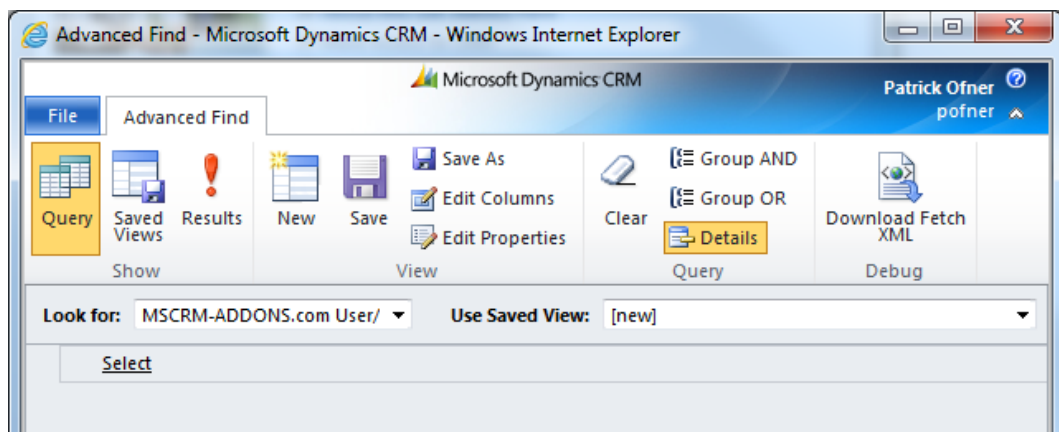
The normal way is to save it on the SharePoint as well or attached it to an activity and to delete it at the end of the process by using "DeleteTempDocument" again.

But especially for developing your process it could be very helpful not to delete it automatically. In this case it can happen that you want to work with this temp document. How this can be done is described underneath:

Within CRM hit [Advanced Find]

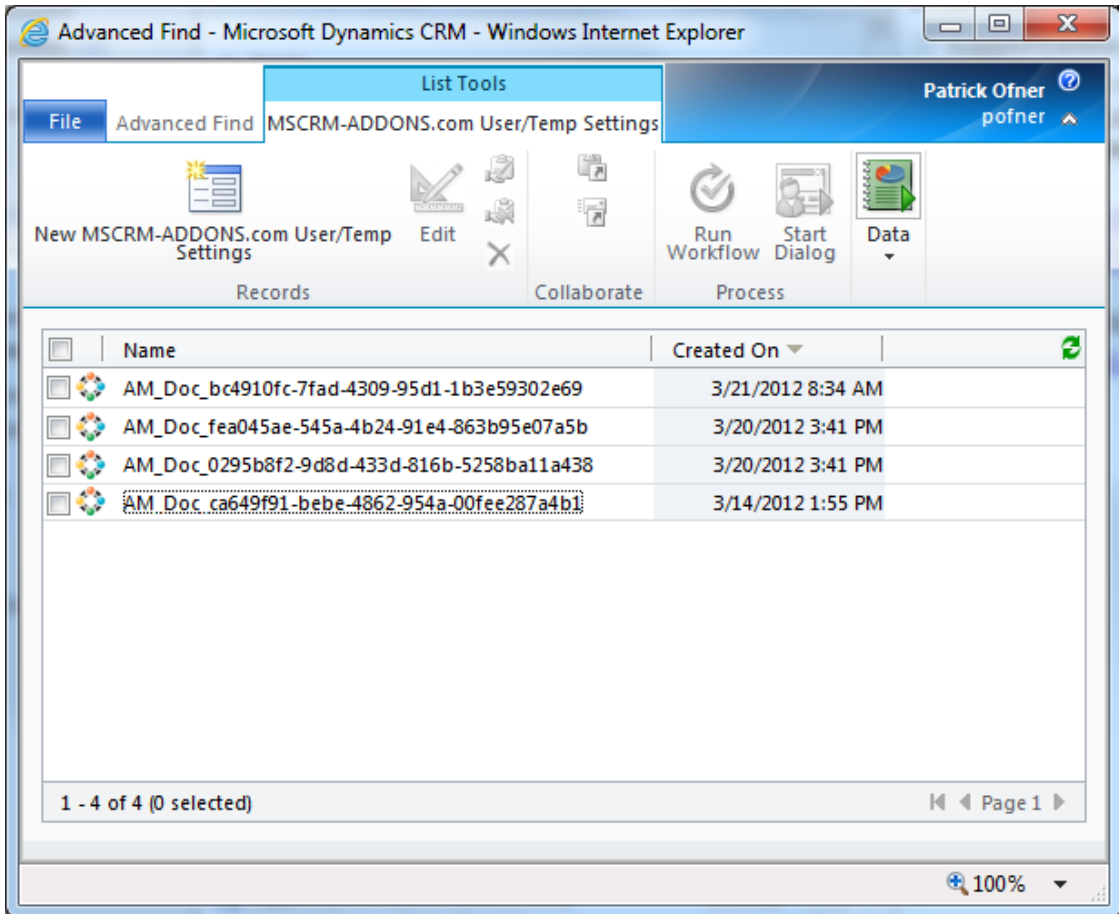


Then the following window will open:

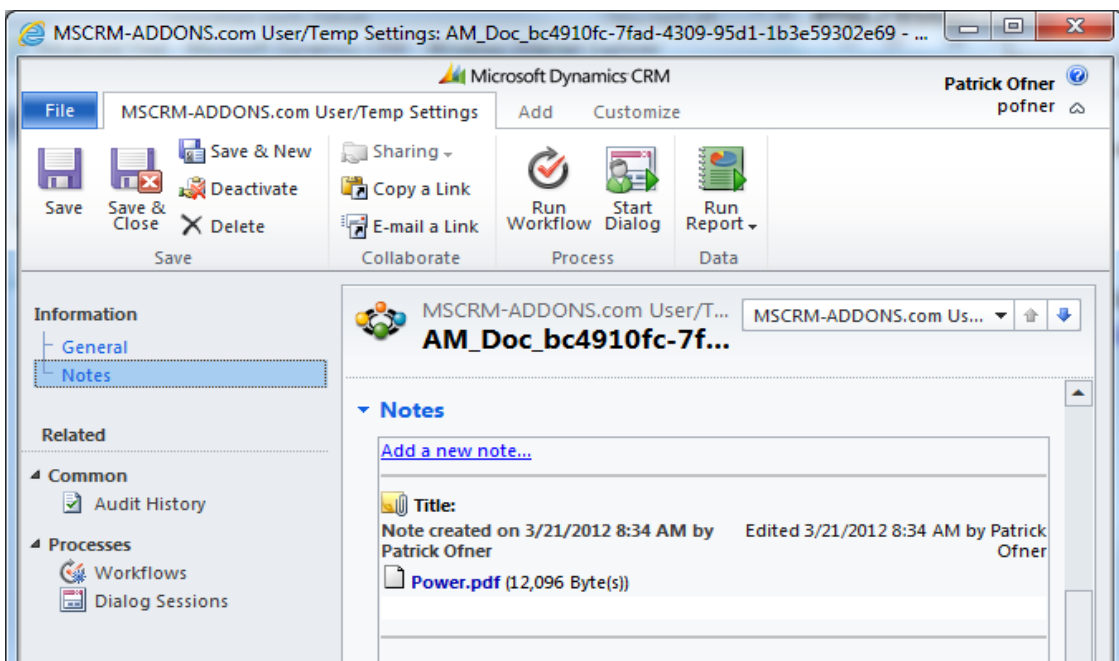




In the „Look for“ box select the „MSCRM-ADDONS.com User/Temp Settings“ entity. To receive all stored settings only hit [Results].



To ensure that every record name is unique, AutoMerge stores them by using the following structure: "AM\_Doc\_" + a new Guid.  
If you want to have a look at the generated document directly, double click at the record and navigate to the "Notes"-section:



There you can see the generated document attached.  
Its name is taken from the "Document Name"-setting of the template. If the name wasn't defined, the default structure ("AM\_Doc\_" + a new Guid) would be taken.

In this example the generated document is of the type ".pdf" This was defined in the "SaveAs" property of the "CreateDocument"-step.

To open the document click on it and your web browser will provide you different ways to achieve this.

## 4 DCP Client / Templates

Therewith you can generate documents by using AutoMerge you need **.docx templates** as the base.

This section is dealing with template. It describes what necessary is to create them and how this can be done.

To be able to create or modify templates the Documents Core Pack Client is required. It can be downloaded from our website by using the following link: [DocumentsCorePack](#).

But before you install the DCP Client we recommend reading the "Install guide" especially chapter "6 Installing the client component". The whole guide can be found here: [Installing DocumentsCorePack](#).

At this point the foundation stone for working with templates is laid. The following link will direct you to the DocumentsCorePack User Guide. The chapter "2 Documents Core Pack Templates" will walk you through creating templates. **Please keep in mind that only .docx (Office Open XML) templates are compatible with AutoMerge.**

Here is the link to the user guide: [DocumentsCorePack User Guide](#)

## 5 Examples

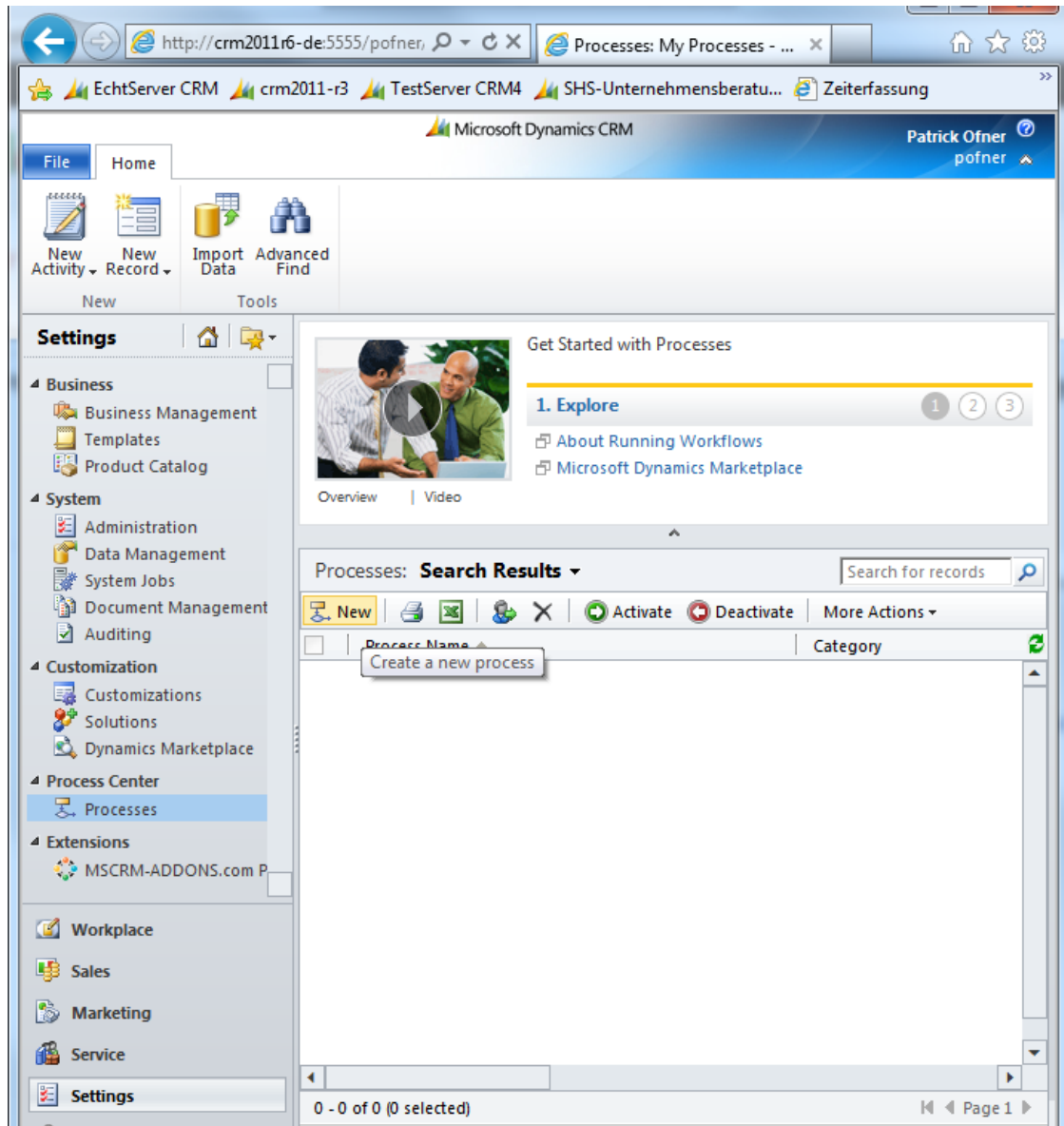
In this section you can find two AutoMerge examples.

### 5.1 Scenario 1: Workflow

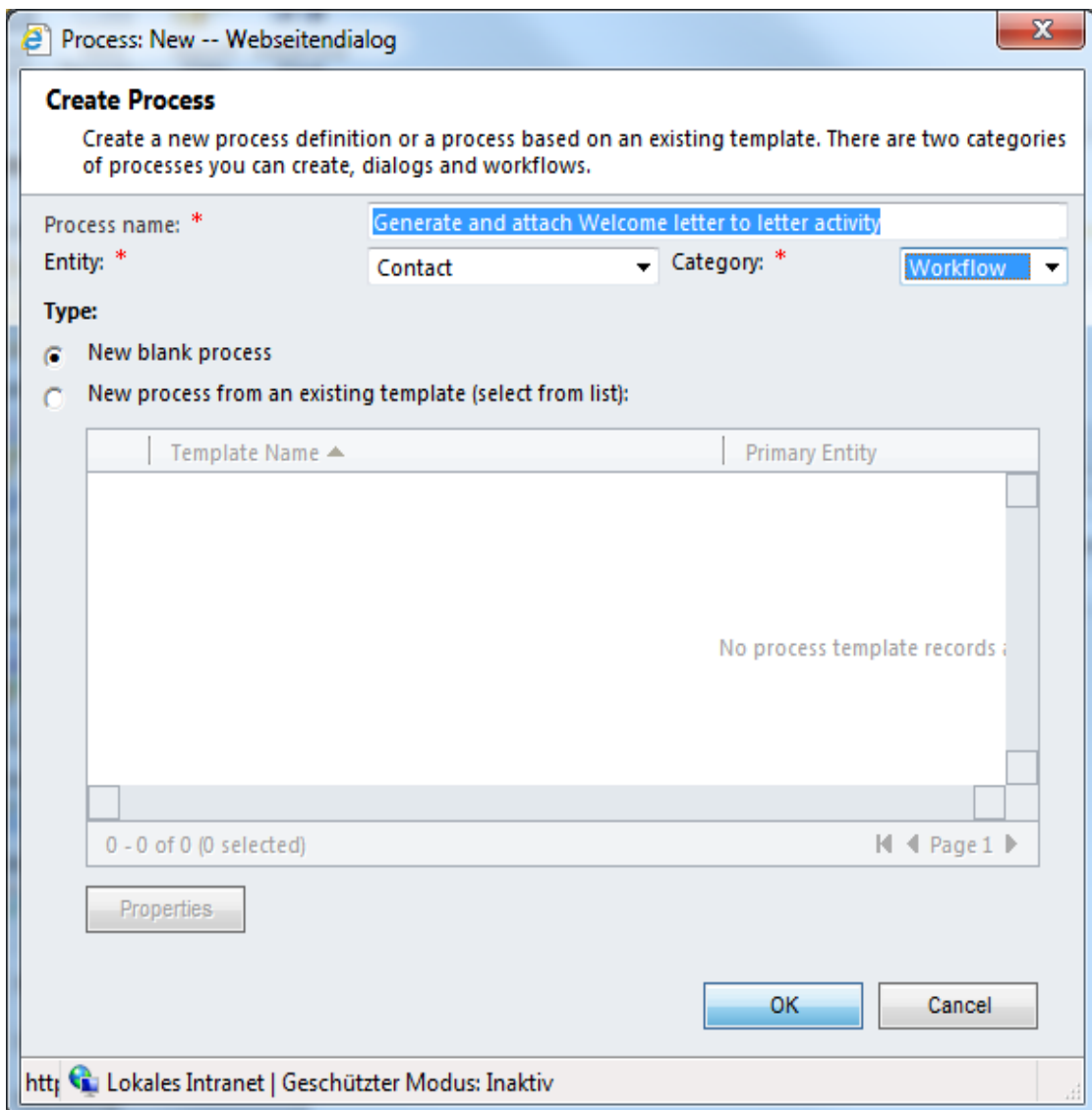
In the first scenario we want to use AutoMerge to achieve the following: For each newly created contact we want to create a welcome letter an attached it to CRM letter-activity. **This Scenario only works with onPremise.**

**INFO:** This example workflow can be downloaded here: <http://mscrm-addons.com/LinkClick.aspx?fileticket=Pdo9Ke3QM8A%3d&tabid=176&mid=830>

To achieve this we have to create a new workflow. Within CRM we navigate to "Settings" -> "Processes" and hit [New].



Thereupon the following dialog will appear:



**Create Process**  
Create a new process definition or a process based on an existing template. There are two categories of processes you can create, dialogs and workflows.

Process name: \*

Entity: \*  Category: \*

Type:

New blank process

New process from an existing template (select from list):

Template Name ▲	Primary Entity
No process template records	

0 - 0 of 0 (0 selected) Page 1

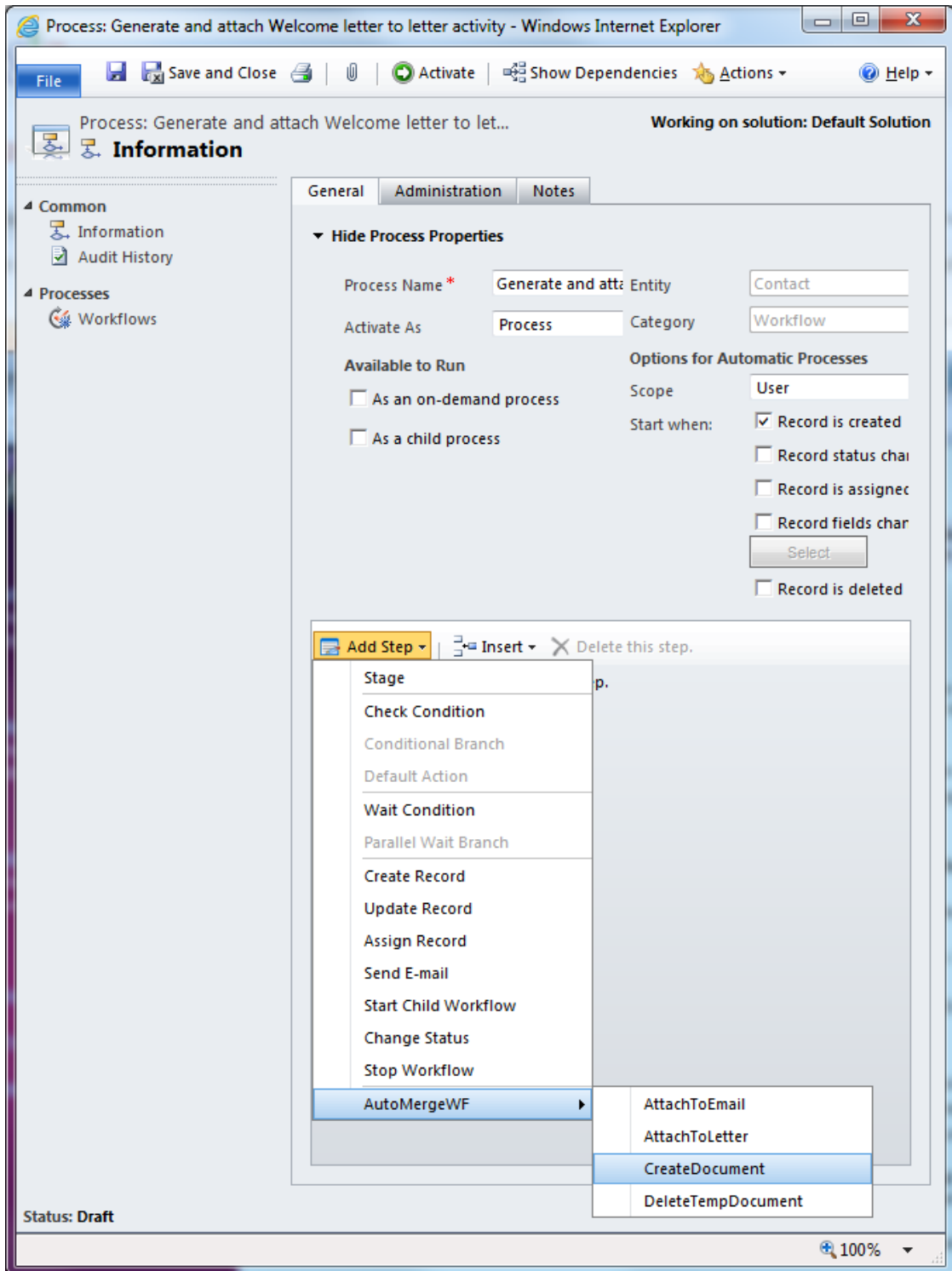
Properties

OK Cancel

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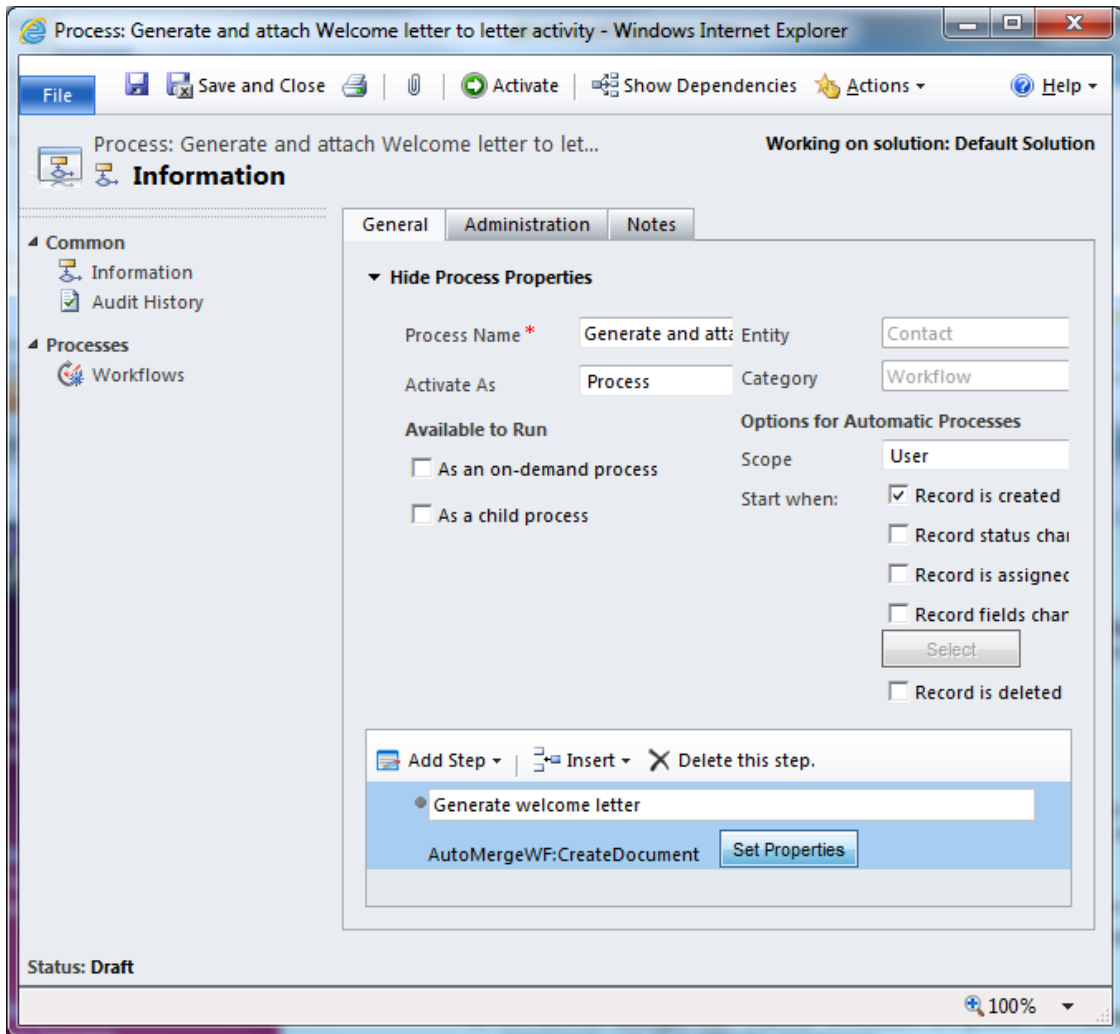
We give the new process the name "Generate and attach Welcome letter to letter activity", select the "contact" entity and choose the "Workflow" category. Further on we leave the default setting "New blank process".

We hit [OK] to proceed.  
Then the following window will open:

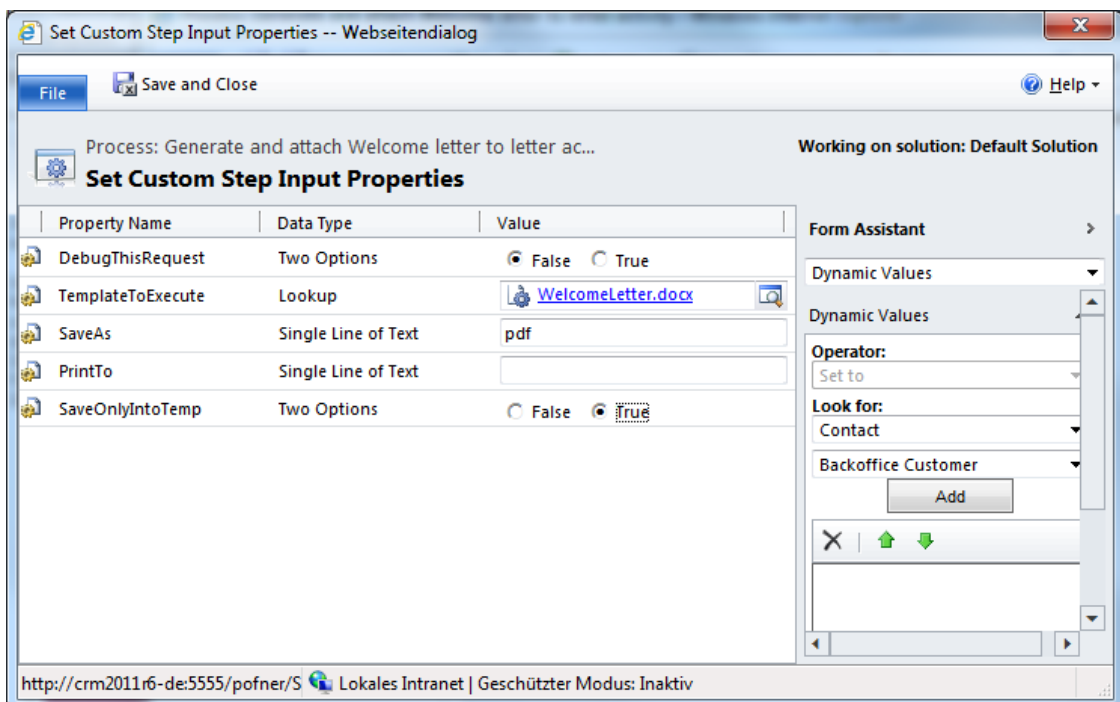


Due to the fact that we want to create a welcome letter for every new contact we have to choose "Record is created" as starting option.

Then we add a new "CreateDocument"-step to the workflow:



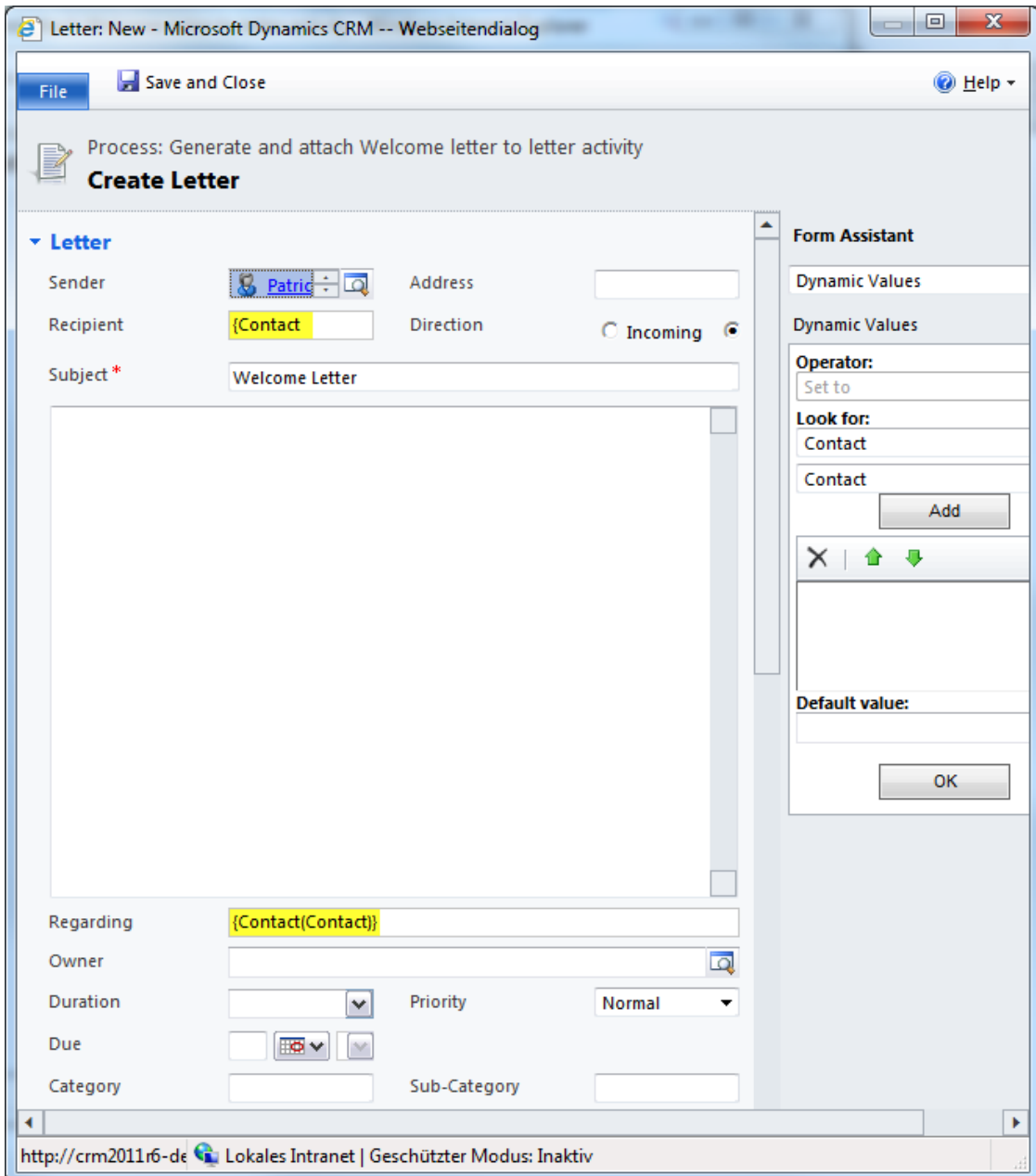
We give it the name "Generate welcome letter" and hit [Set Properties] to define them. Thereupon a new dialog will appear:



- **DebugThisRequest:** we set this property to "False" because we do not need any log files.
- **TemplateToExecute:** here we select the "WelcomeLetter.docx" template.
- **SaveAs:** The generated document should be stored as .pdf. To achieve this we have to fill in "pdf".
- **PrintTo:** we don't want to print the generated document. Therefore we leave this field empty.
- **SaveOnlyIntoTemp:** We set this option box to "True" because first we only want to save the template locally and attach it to the letter then. There is no need to save it on a file share or SharePoint in addition.

Then we hit [Save and Close].

Next we want to create a letter to which the generated document will be attached later. To achieve this we add the standard workflow step "Create Record" to the workflow. We give it the name "Create Letter", choose "letter" in the drop down box and hit its "Set Properties"-button.



Letter: New - Microsoft Dynamics CRM -- Webseitendialog

File Save and Close Help

Process: Generate and attach Welcome letter to letter activity

### Create Letter

**Letter**

Sender: Patric Address: \_\_\_\_\_

Recipient: {Contact} Direction:  Incoming

Subject\*: Welcome Letter

Regarding: {Contact(Contact)}

Owner: \_\_\_\_\_

Duration: \_\_\_\_\_ Priority: Normal

Due: \_\_\_\_\_

Category: \_\_\_\_\_ Sub-Category: \_\_\_\_\_

**Form Assistant**

Dynamic Values

Operator: Set to

Look for: Contact

Contact

Add

Default value:

OK

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We select any user as sender.

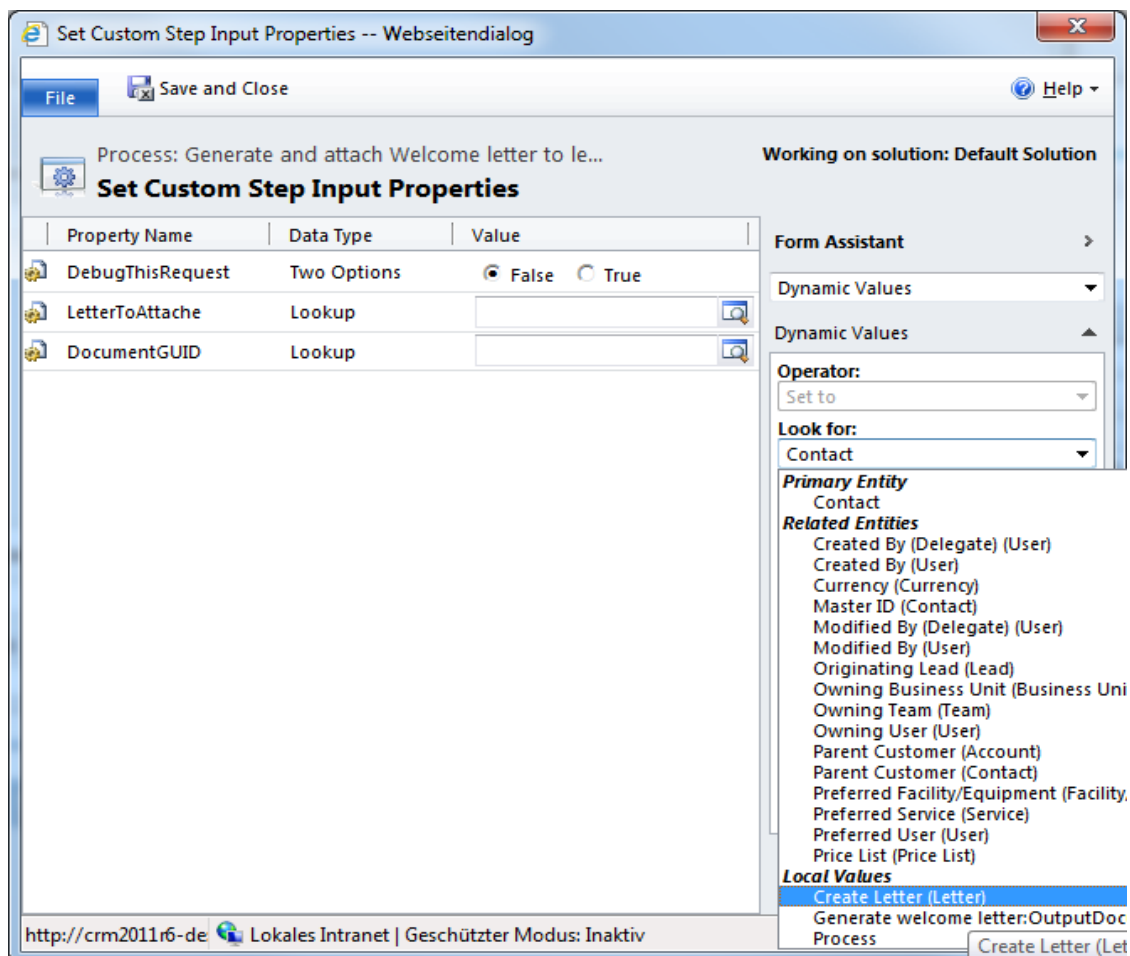
The "Recipient" should be the new created contact. This can be achieved by using the "Form Assistant" at the right side of the window: First we place the cursor in the "Recipient" field. Then we select the "Contact" entity and its "Contact" field.

After it we hit [Add] and [Ok] to included it.

The "Regarding" field is set automatically.

We hit [Save and Close] to proceed.

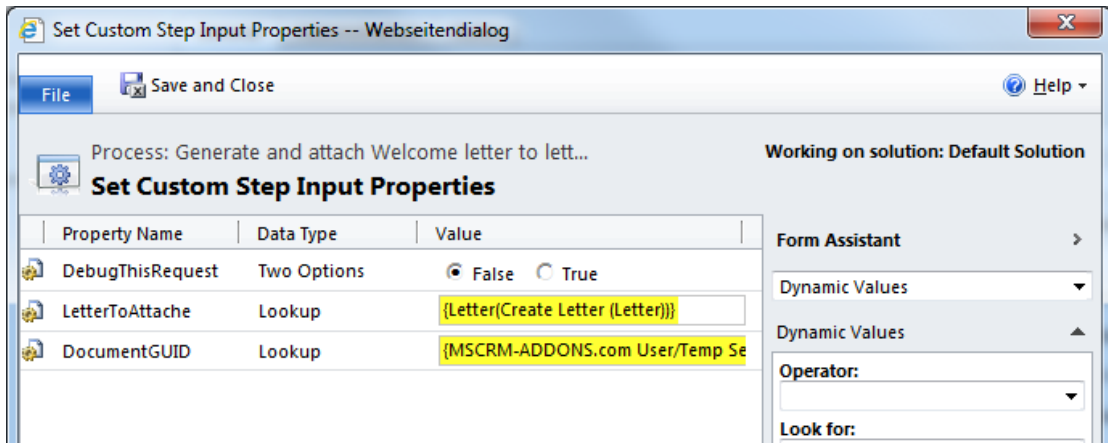
Next we have to attach the generated document to the created letter. This can be done by using the "AttachToLetter" request of the AutoMerge steps. We add this step, give it the name "Attach Document To Letter" and hit [Set Properties] again. Thereupon the following dialog will appear:



There we define the values of the following properties:

- **DebugThisRequest:** we set this property to "False" because we do not need any log files.
- **LetterToAttach:** Here we have to refer to the before created letter. We do this by using the "Form Assistant" again. First we set the cursor in the field of the property. Then we select "Create Letter (Letter)" of the "Local Values" like shown in the screenshot above. Then we hit [Add] and [OK].
- **DocumentGUID:** Here we have to refer to the document generated before. This can be achieved similar to the "LetterToAttach" property. But in this case we select "Generate welcome letter:OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings)" and hit [Add] and [OK].

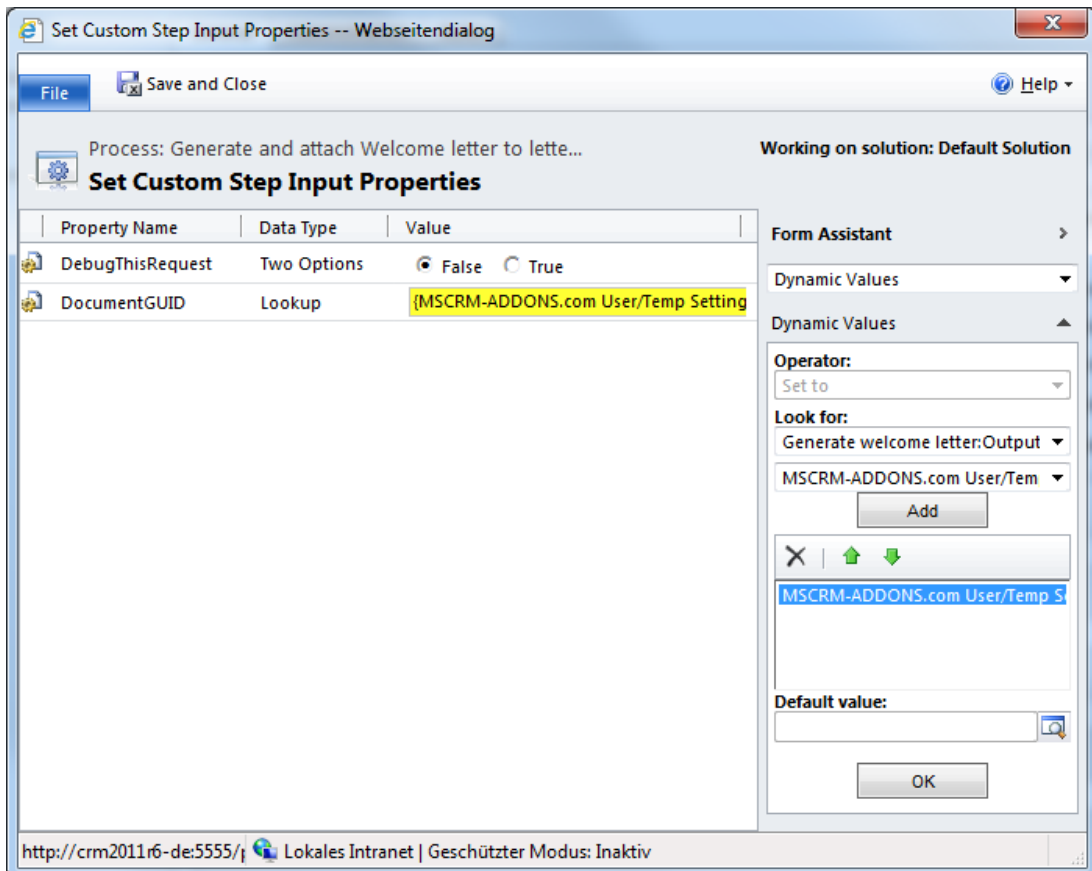
Then the dialog will look like this:



We complete our adjustment by pressing [Save and Close].

The final part of our workflow is to delete the temporary document again. Because it is already attached to the letter and we don't need it any more. For that we add the "DeleteTempDocument" step to the end of the workflow. We give it the name "Delete Temp Document" and hit [Set Properties].

Then the following window will open:

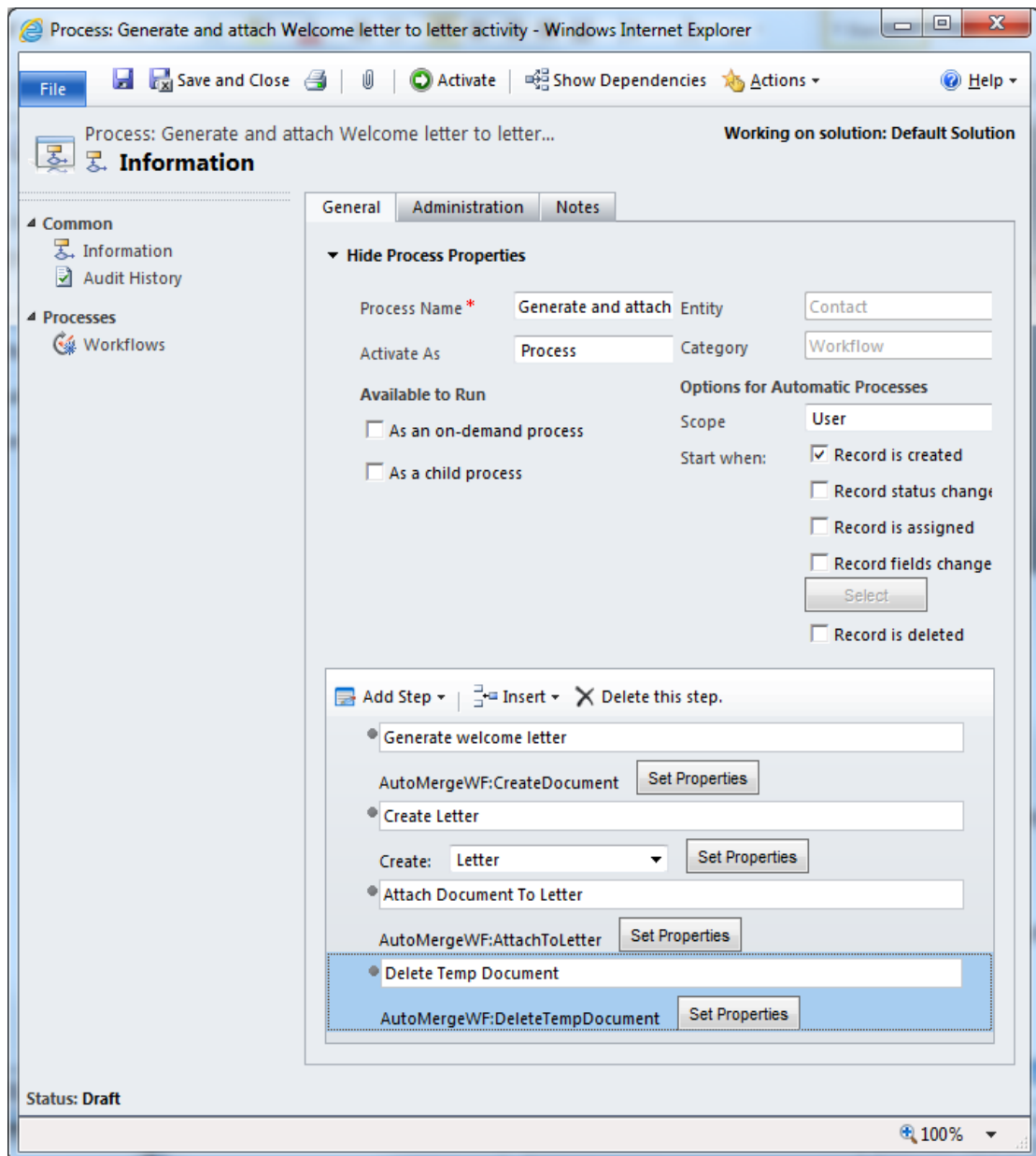


Here we only have to set two properties.

- **DebugThisRequest:** we set this property to "False" because we do not need any log files.
- **DocumentGUID:** Here we have to refer to the document generated before. To achieve this we do the following: Set the cursor into the value field. Then we select "Generate welcome letter:OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings)" from the "Form Assistant" and hit [Add] and [OK].

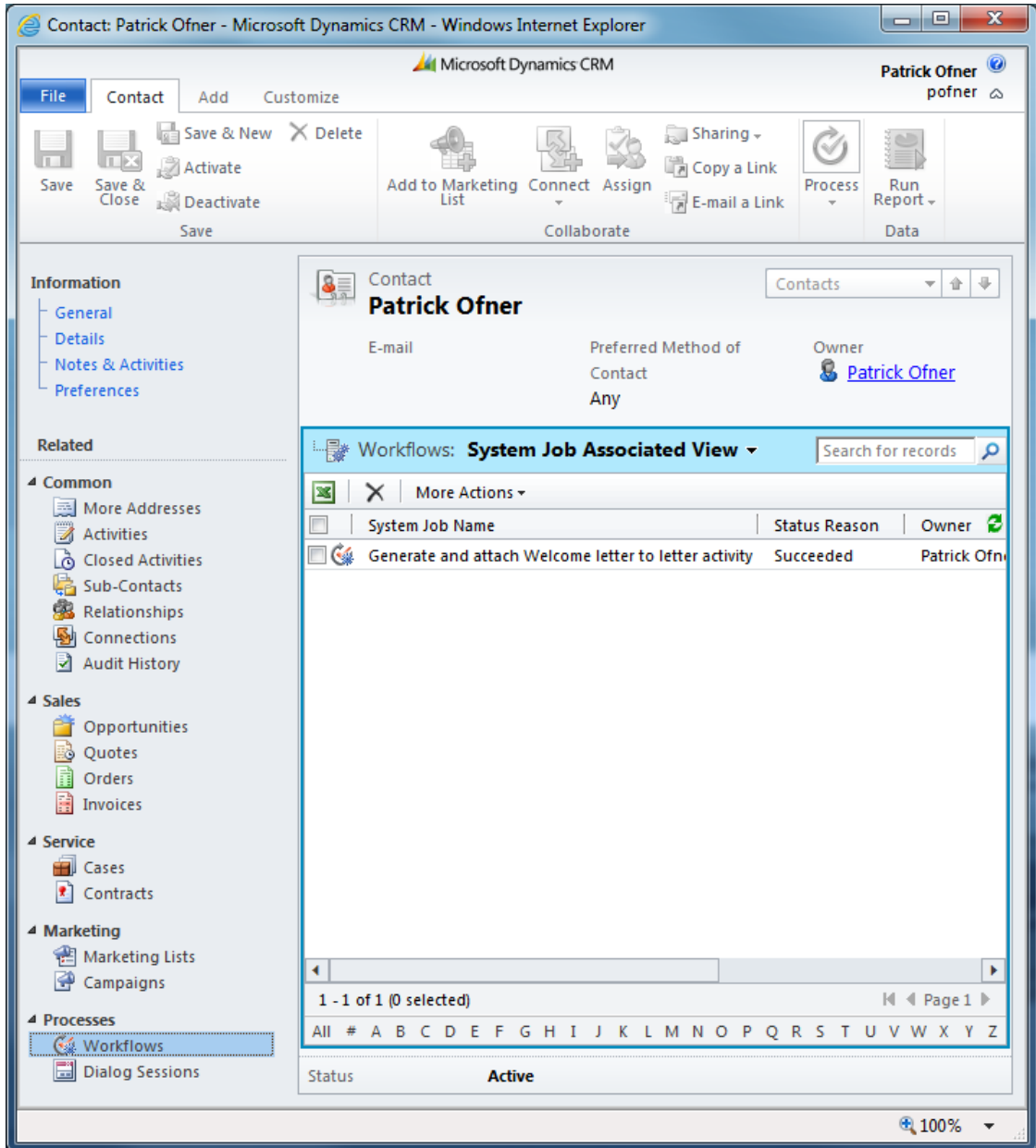
Then all properties are set correctly, we hit [Save and Close].

The finished workflow will look like this:

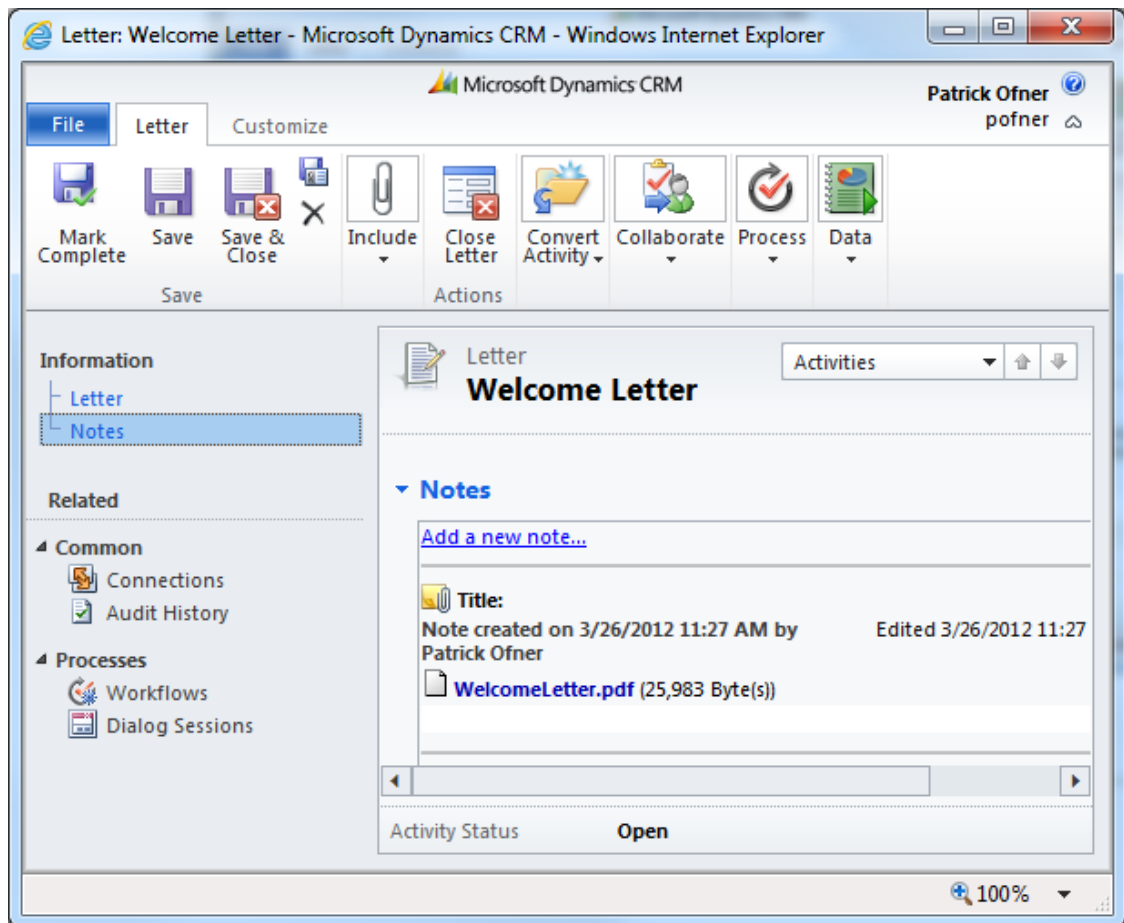


After hitting [Activate] the workflow will be enabled and we can try it out.

To do this we create a new contact and navigate to "Workflows". After a short duration we are able to find the succeeded workflow there (shown in the screenshot below).



Under "Activities" we can find the created letter:



We open it and navigate to the "Notes"-section where we can find the attached welcome letter. We can open it by clicking on it. The letter will look like this:

James Elliott  
PTM EDV-Systeme GmbH  
Bahnhofgürtel 59  
8020 Graz  
Austria

Dear Mr. Patrick Ofner,

PTM EDV-Systeme GmbH would like to welcome you as a new customer to our company. It is a great pleasure for us.

We like to let our customers know that they are very important and therefore it is crucial to us that our customers are 100% satisfied.

We are proud of the fact that we can offer our customers quick and competent services. If you have any problems or questions regarding our products, please do not hesitate to contact us.

We can be contacted in the following ways:

*Phone: 0043 316 680 880*

*Email: [support@mscrm-addons.com](mailto:support@mscrm-addons.com)*

Sincerely,

James Elliott  
Support staff

Now the letter is ready to send.

## 5.2 Scenario 2: Dialog

In this second scenario we want to use AutoMerge to achieve the following: After the user has chosen or opened a quote he should have the possibility to select a template for the merge process. Further on he should also be able to define the file extension of the generated document and if the document should be attached to an email or letter. If the user chooses attach to a letter, he should have to define if he wants to print the letter or not.

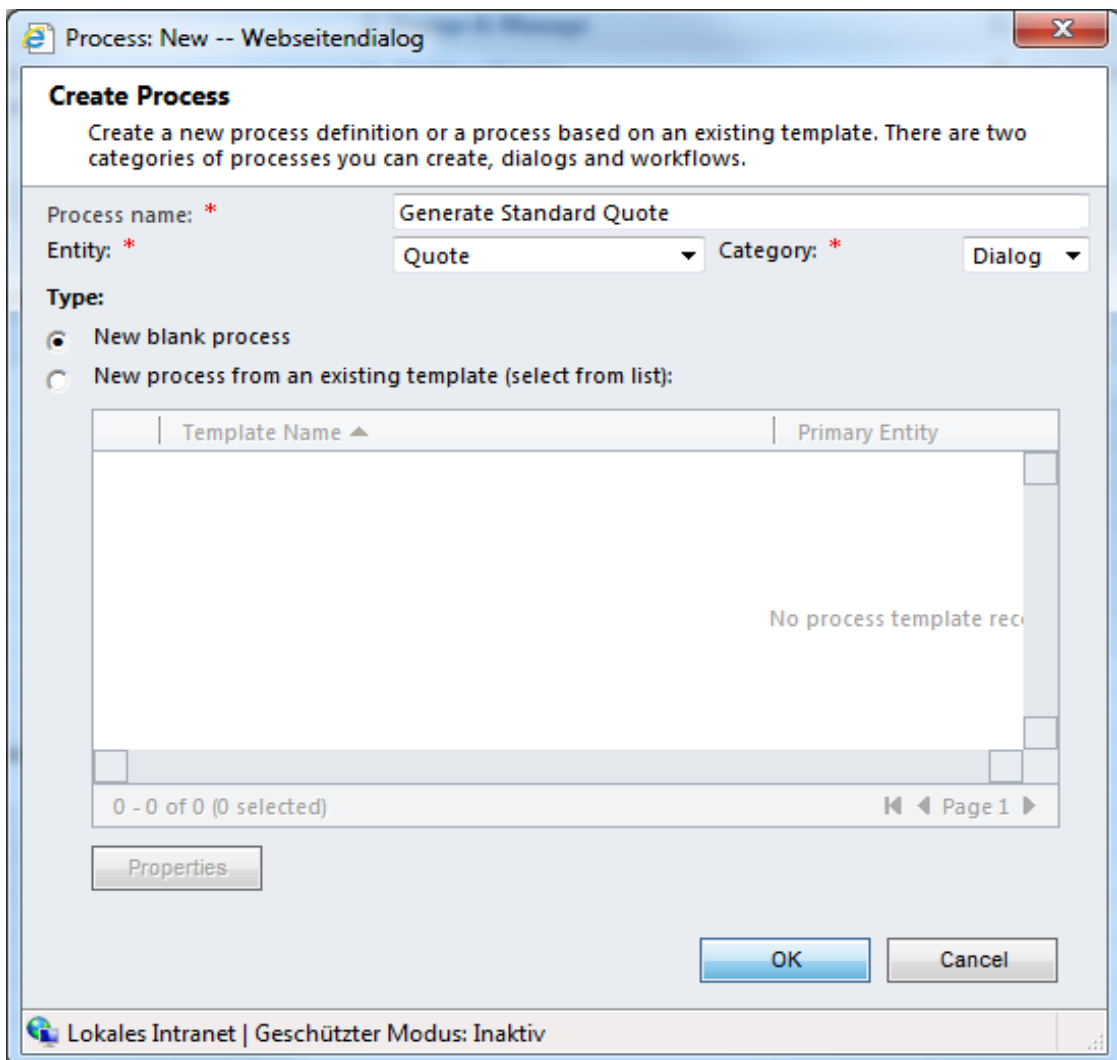
If the user chooses "attach to email" it should be sent automatically.

**This scenario only works with onPremise.**

We put this into practice by using the AutoMerge functionality inside a CRM Dialog.

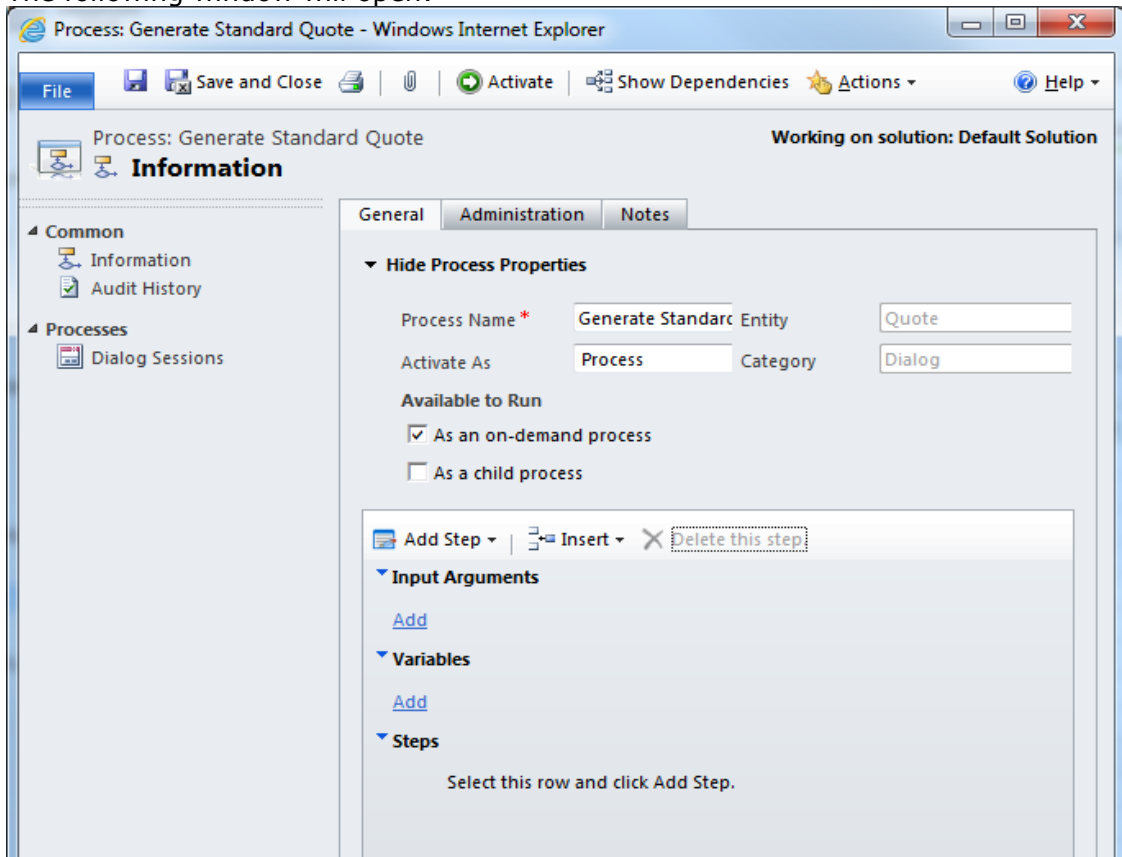
**INFO:** This example dialog can be downloaded here: <http://mscrm-addons.com/LinkClick.aspx?fileticket=UYKRSDIYho0%3d&tabid=176&mid=830>

Within CRM we navigate to "Settings" -> "Processes" and hit [New].



In the popped up window we give the process the name "Generate Standard Quote", select "Quote" as entity and choose the "Dialog" category. We hit [Ok] to continue.

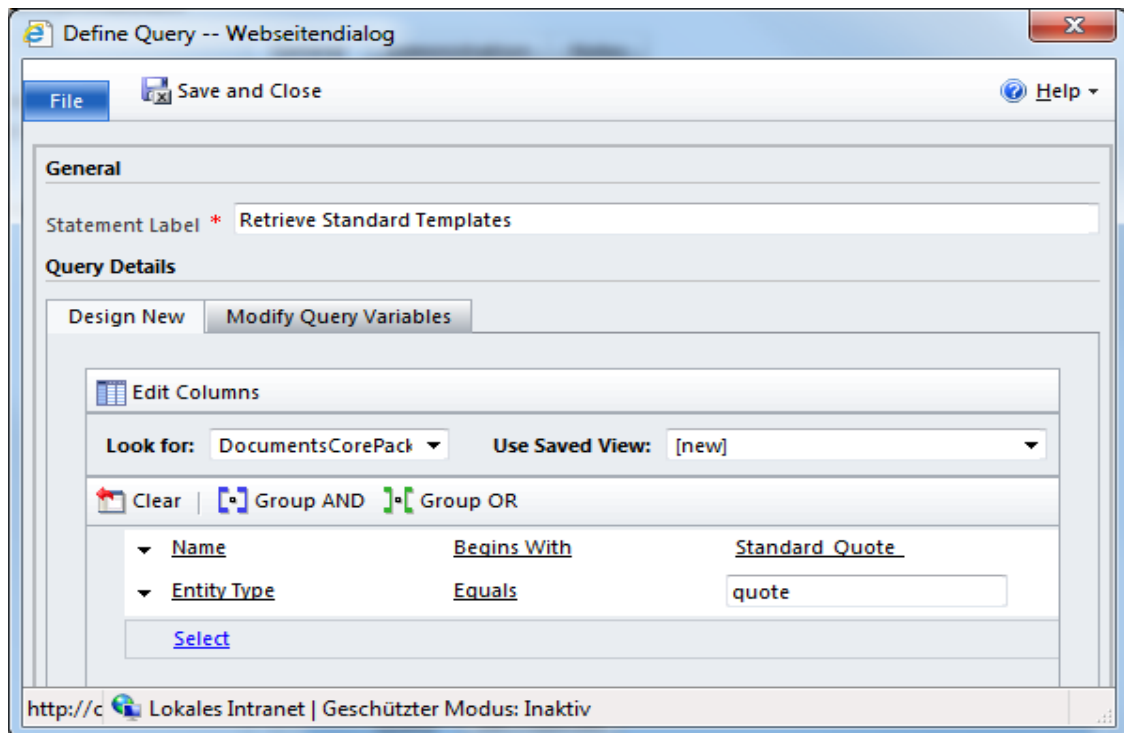
The following window will open:



### 5.2.1 Part 1: User Interaction

First the user should be able to select a template from a pick list. Therefore we add the "Query Crm Data"-step to our dialog. We define the name "Retrieve Standard Templates" and hit [Set Properties].

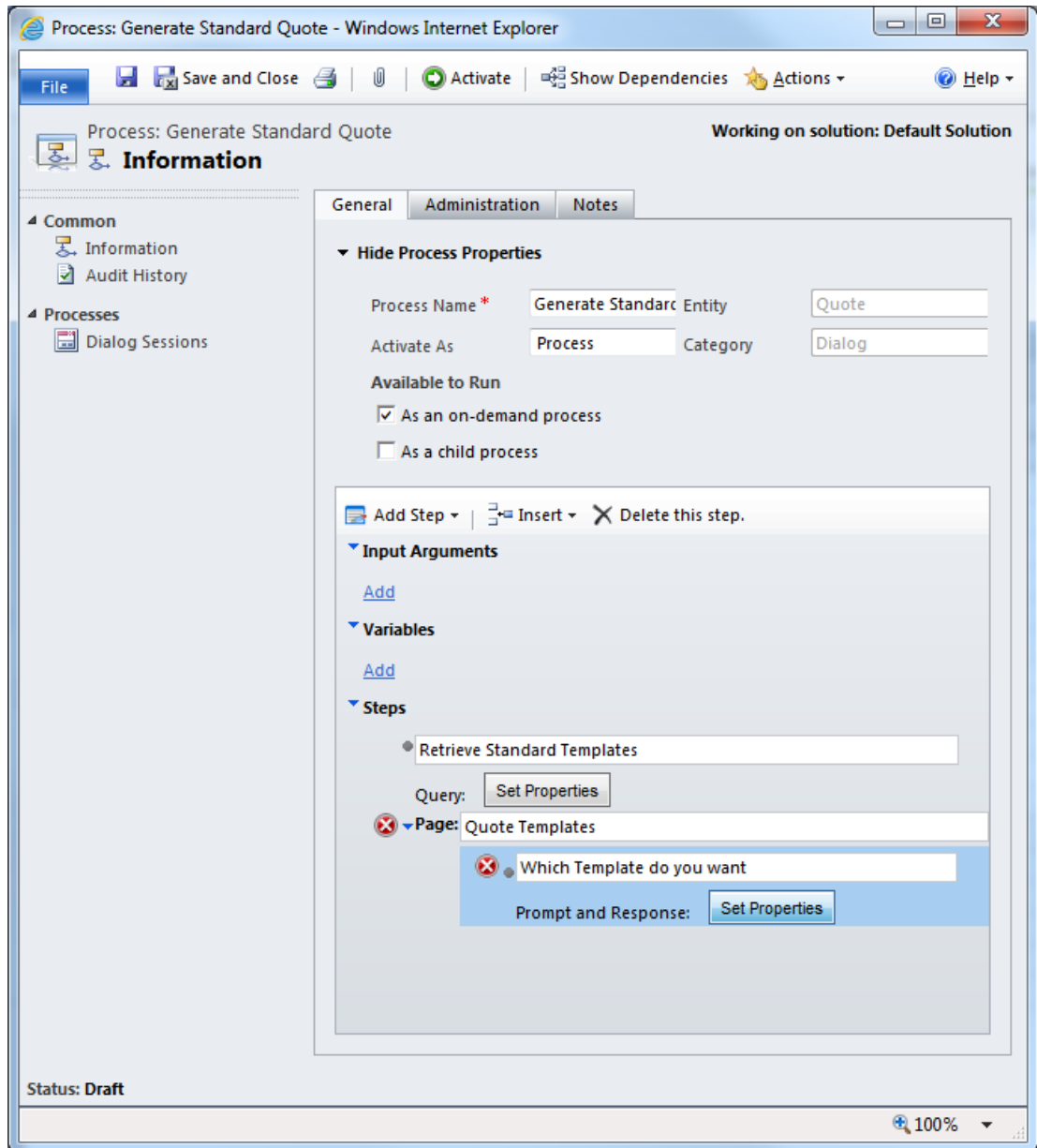




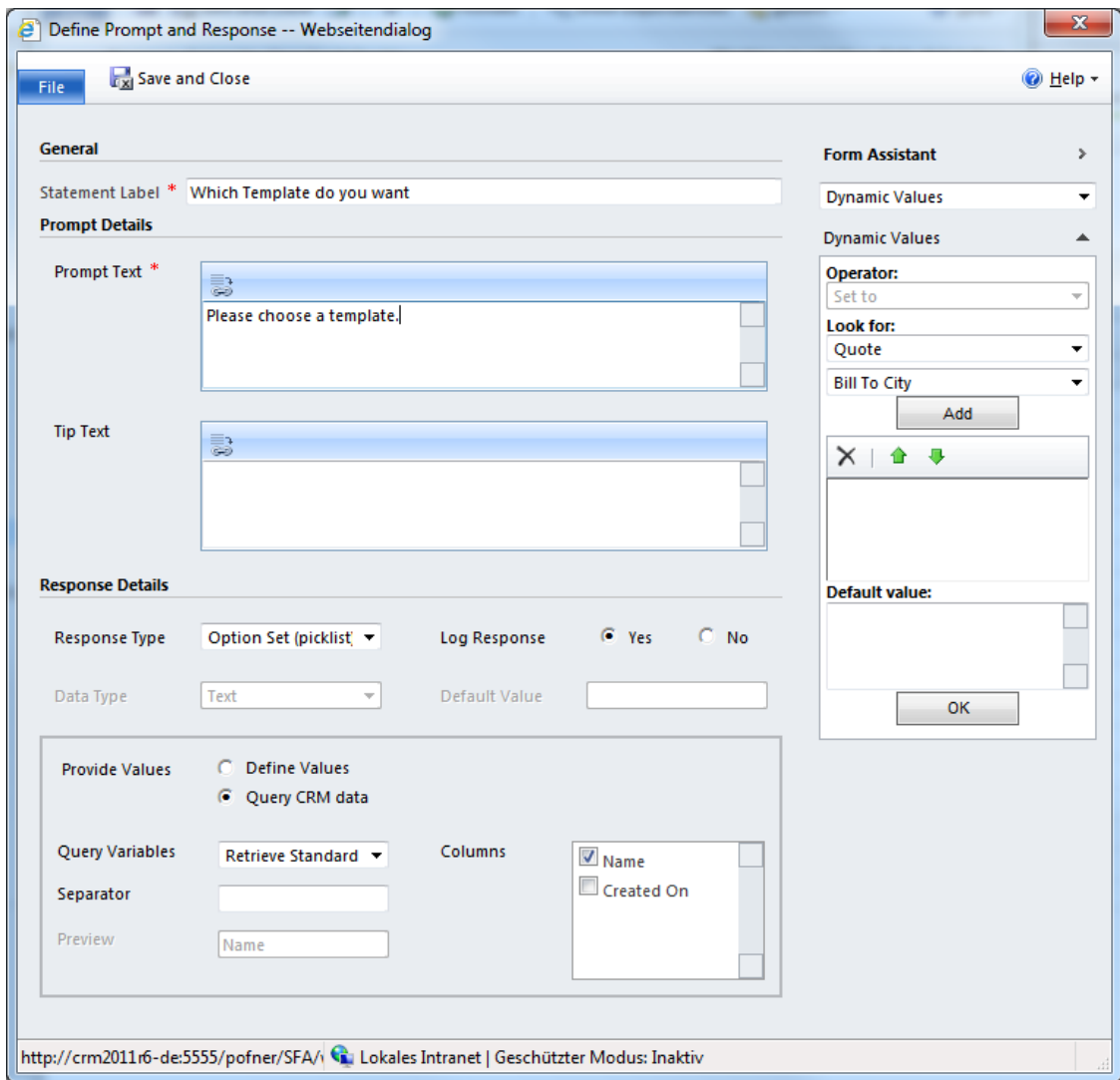
We use the popped up window to define a query. It will retrieve all templates of the type "quote" starting with "Standard\_Quote\_" of the "DocumentsCorePack Templates"-entity.

We hit [Save and Close] to proceed.

Next we add a new page to the dialog and give it the name "Quote Templates". Underneath we include a new "Prompt and Response" with the name "Which Template do you want?"



To define its properties we hit [Set Properties]:

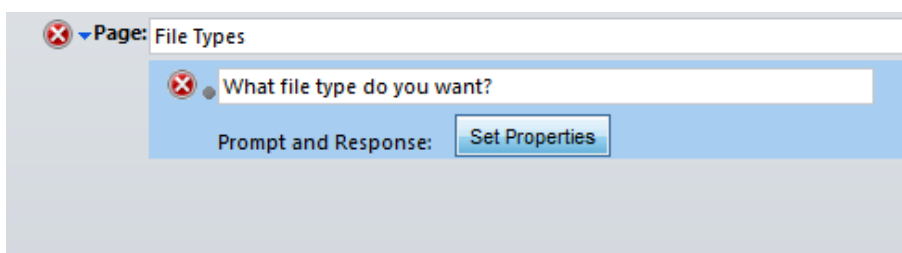


We define "Please choose a template" as "Prompt Text" and set the "Response Type" to "Option Set (picklist)". We check "Query CRM data" then select "Retrieve Standard Templates" and use the "Name"-column.

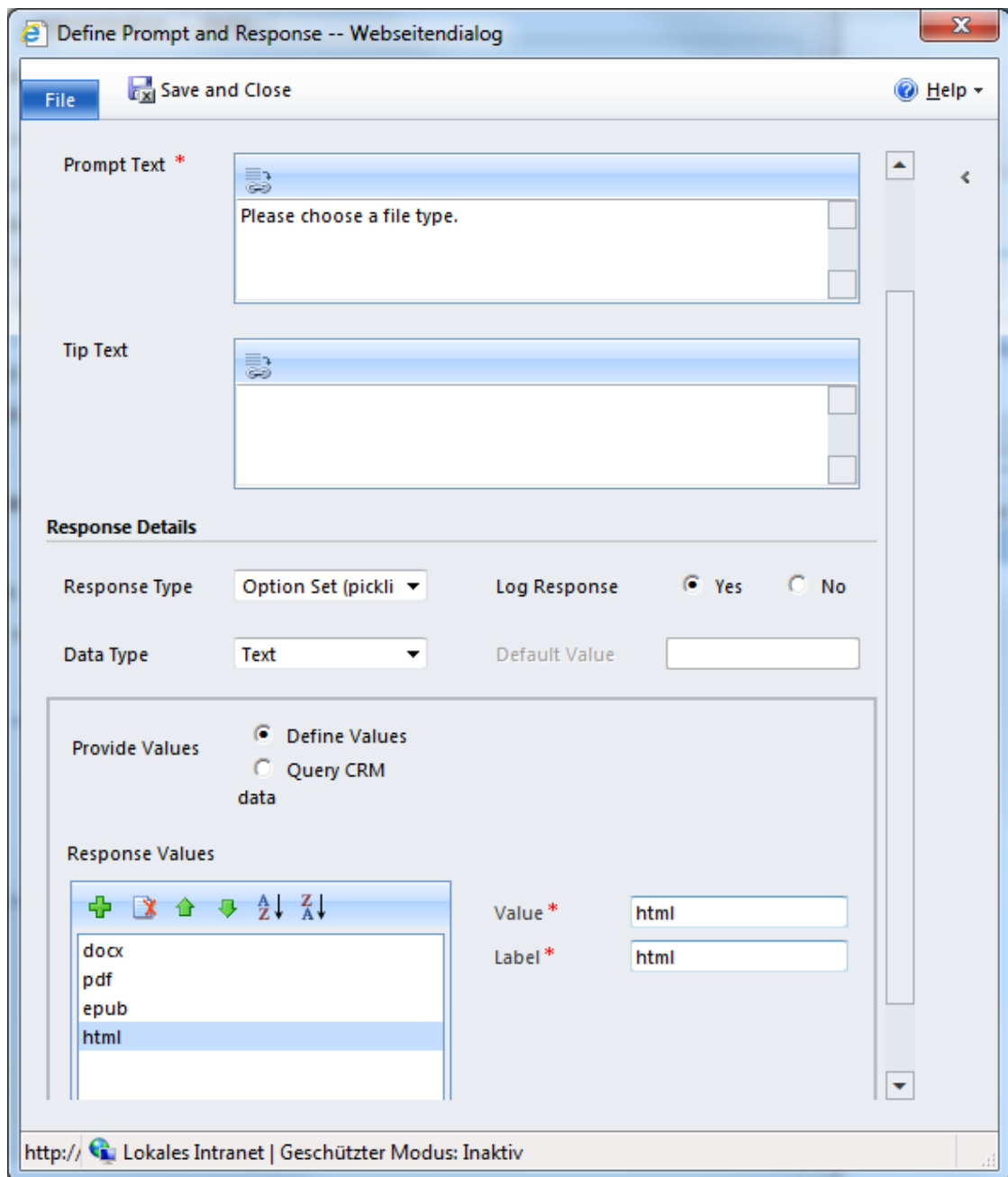
We hit [Save and Close] to continue.

Next we want to give the user the possibility to select the file extension of the generated document.

Because of that we add a further "Page" to our dialog and name it "File Types". Same as above, we add a "Prompt and Response"-step to it. We name it "What file type do you want?".



We click on [Set Properties] to set them up.

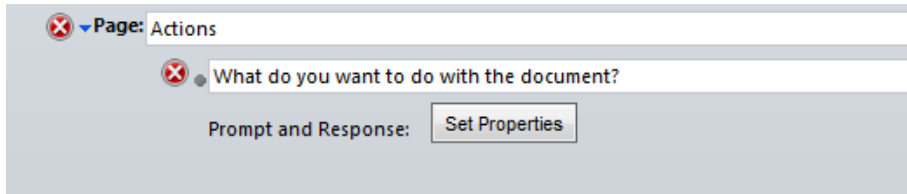


The "Prompt Text" should be "Please choose a file type." As "Response Type" we choose "Option Set (picklist)" again. But in this case we check "Define Value" and add "docx", "pdf", "epub" and "html" as "Response Values". This can be achieved by clicking on the green cross.

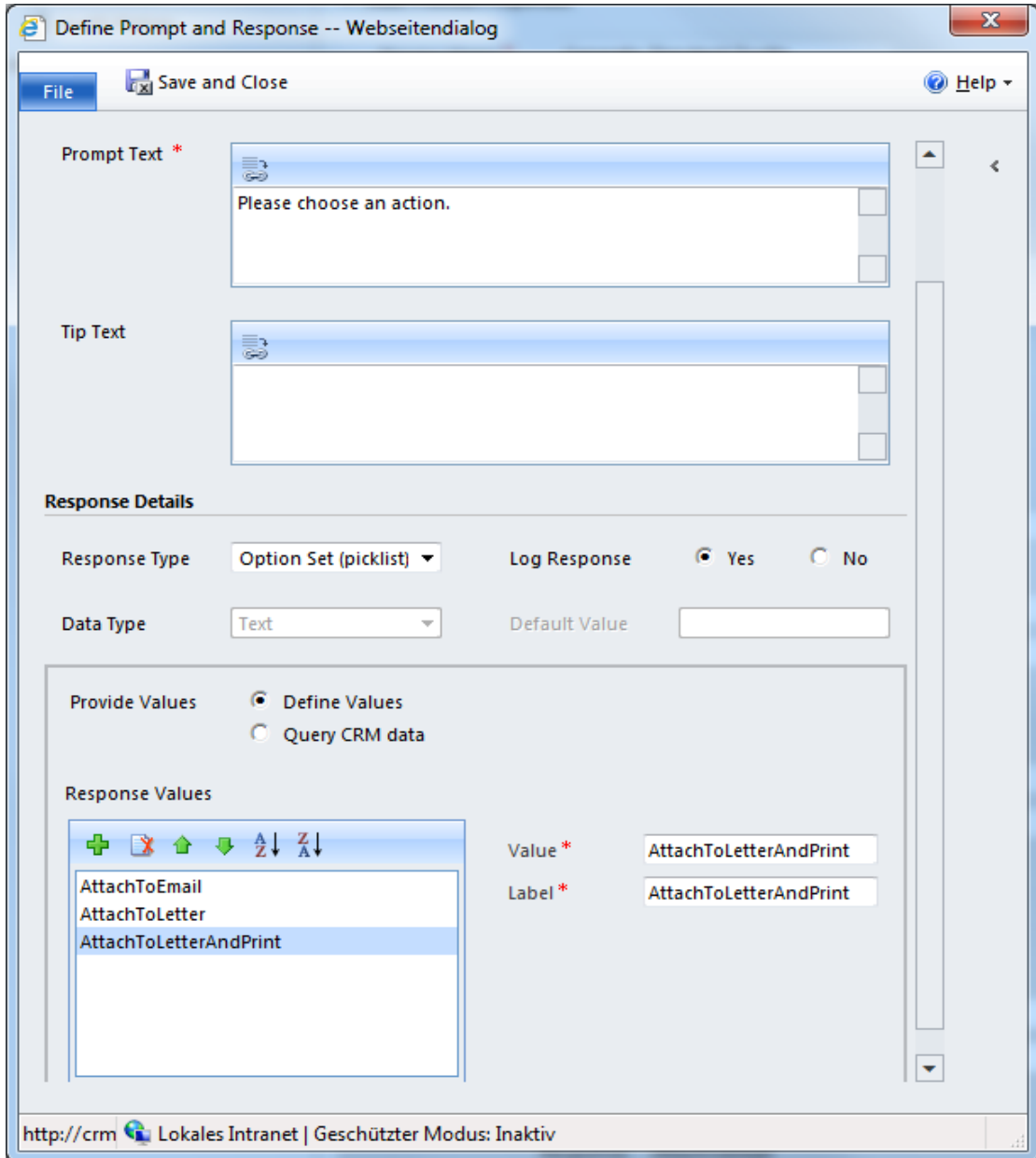
We hit [Save and Close] to proceed.

The final part is to provide the user the possibility to select if he wants to attach the generated document to an email, to a letter or to a letter and print it out.

For that we add a further "Page" to the dialog and name it "Actions". Underneath it we add a "Prompt and Response"-step as well. We give it the name "What do you want to do with the document?".



We hit [Set Properties] to set them up.



We define "Please choose an action" as "Prompt Text" and select the "Response Type" "Options Set (picklist)". Then we check "Define Values" and add the following items by hitting the green cross to the list:

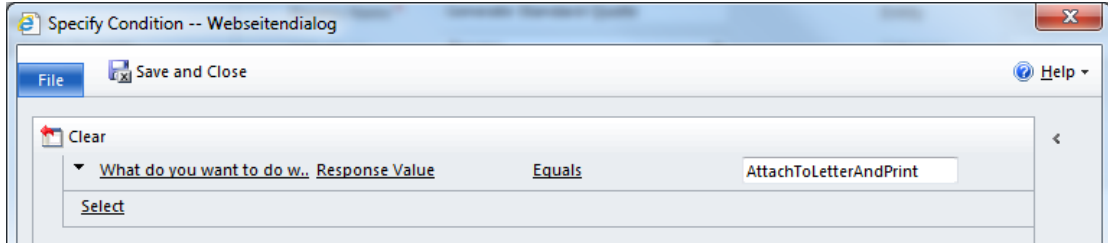
- **Name:** AttachToEmail                      **Value:** AttachToEmail
- **Name:** AttachToLetter                      **Value:** AttachToLetter
- **Name:** AttachToLetterAndPrint              **Value:** AttachToLetterAndPrint

We hit [Save and Close] to proceed.

## 5.2.2 Part 2: AutoMerge steps

Next we add a “Check Condition”-step with the name “Print or not”. We use it to decide if the document should only be generated or if it should be printed as well.

To define it, we click on the condition itself:

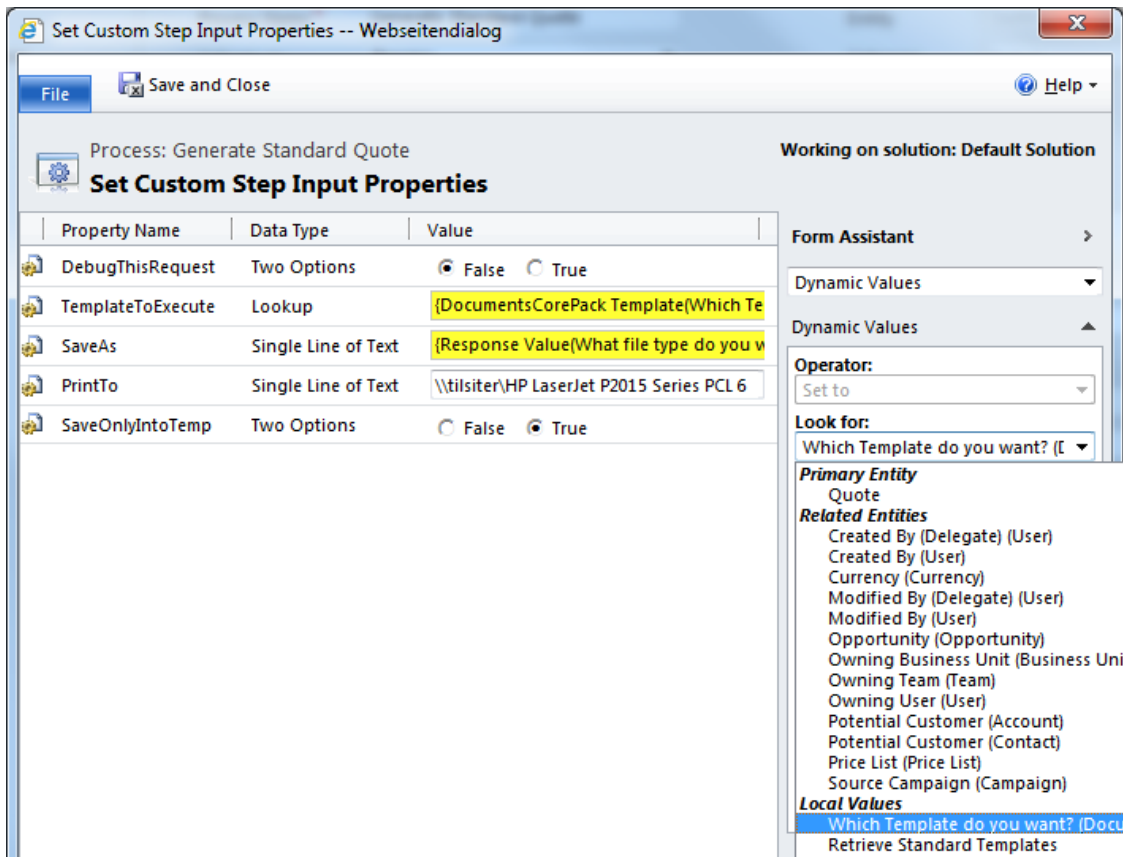


We select the “What do you want to do with the document?” prompt and response, created before. Next we choose its “Response Value” and define that it has to “Equals” “AttachToLetterAndPrint”.

We complete the condition by clicking [Save and Close].

### 5.2.2.1 Part 2.1: Generate and print

If this condition is true we want to generate and print the document and attach it to a new letter. Therefore we add the “GenerateDocument”-step of the AutoMerge functionalities to it underneath. We name it “Generate and print document” and hit [Set Properties].

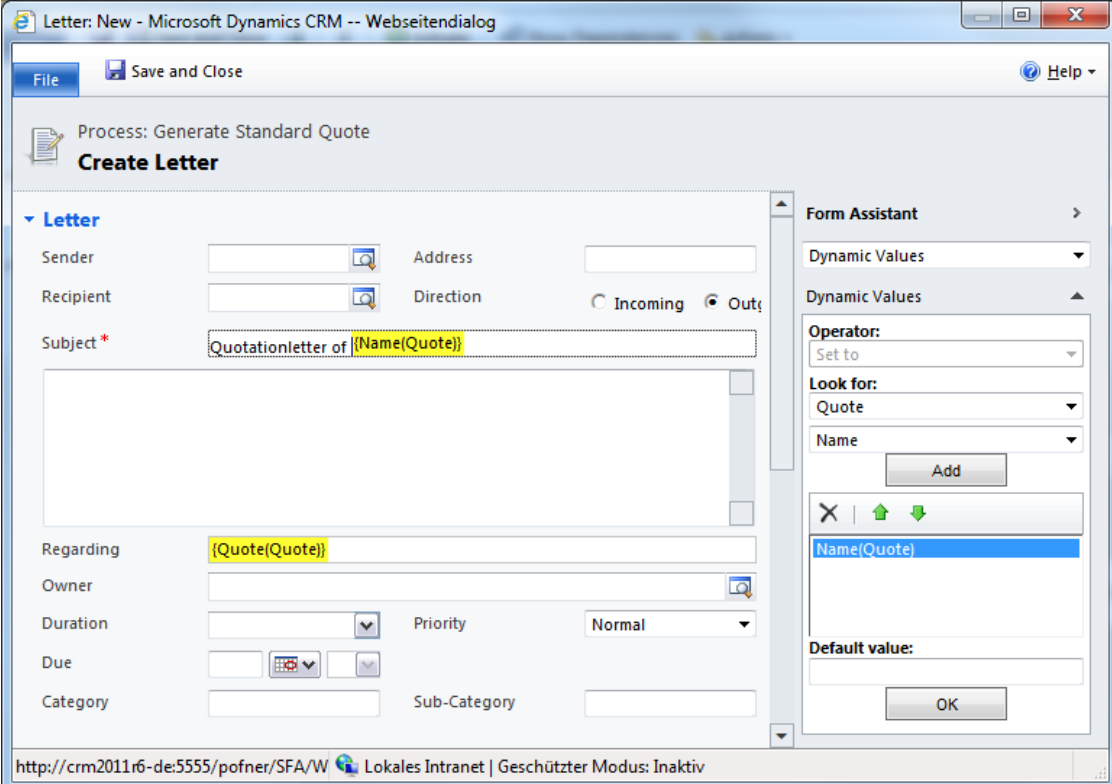


This window allows us to define the following properties:

- **DebugThisRequest:** we set this property to "False" because we do not need any log files.
- **TemplateToExecute:** Here we have to refer to the template chosen from the user before. To achieve this we put the cursor into the field and use the "Form Assistant" on the right side of the window. We select the "Which Template do you want? (DocumentsCorePack Tempalte)"- prompt and response as shown in the screenshot above. Then we select "DocumentsCorePack Template" hit [Add] and [Ok].
- **SaveAs:** Here we have to refer to the selected file type. This works the same way as for the property above, except that we select "What file type do you want?" and "Response Value".
- **PrintTo:** We are using this property to define the path of a network printer. In this case "\\tilsiter\HP LaserJet P2015 Series PCL 6".
- **SaveOnlyIntoTemp:** We set this property to "True".

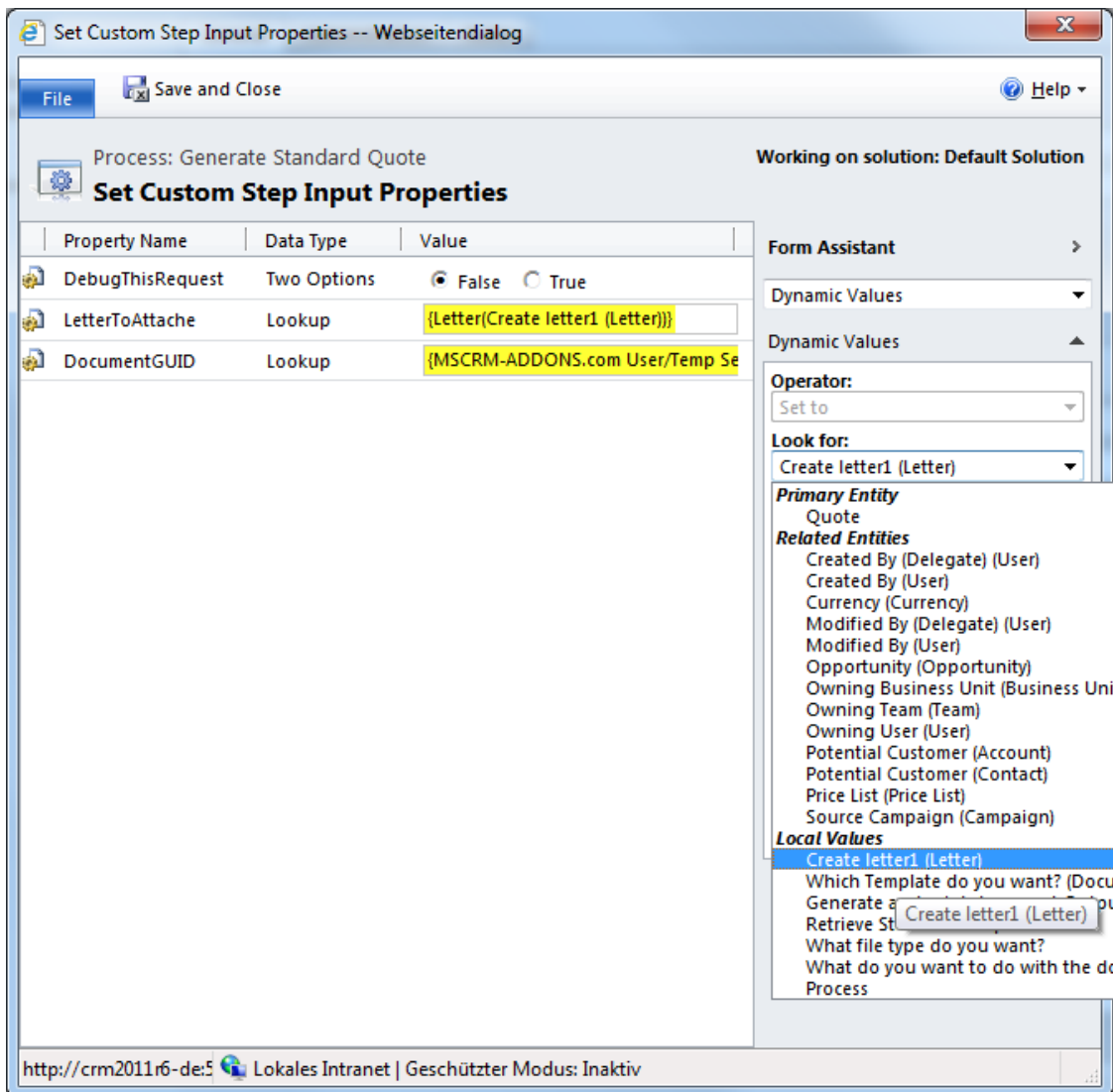
We hit [Save and Close] to proceed.

Underneath we add a "Create Record"-step. We select "letter", name it "Create letter1" and define its properties:



We define its "Subject" using the "Form Assistant".  
 The "Regarding"-field is set automatically.  
 We hit [Save and Close] to continue.

After it we have to attach the before generated document to this letter. Therefore we add an "AttachToLetter"-step, name it "Attach letter1" and define the properties as shown underneath:



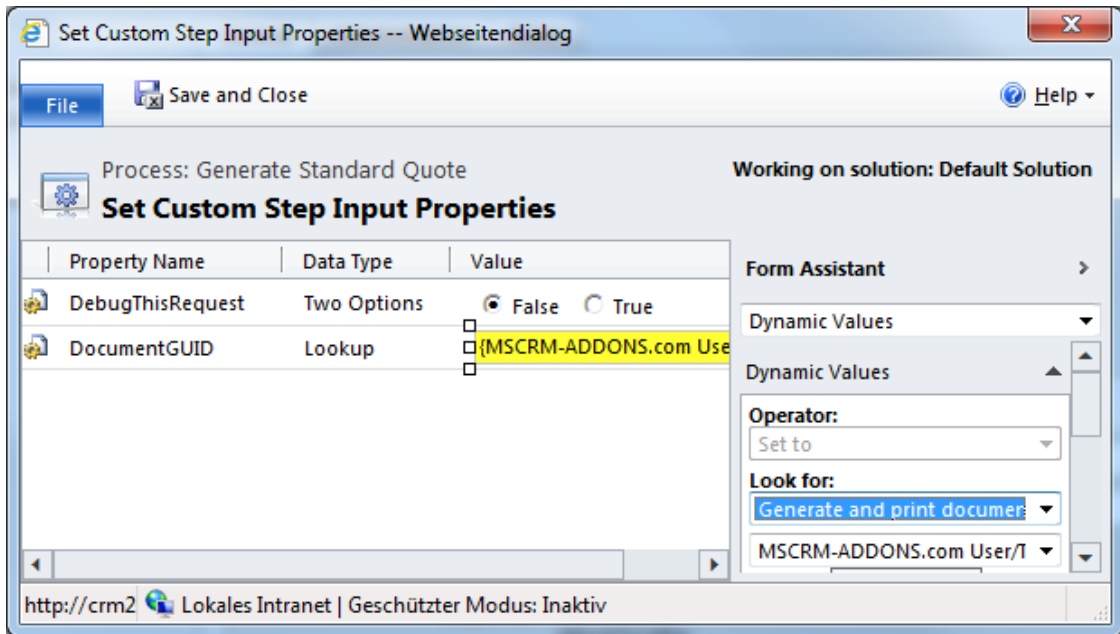
Properties:

- **DebugThisRequest:** we set this property to "False" because we do not need any log files.
- **LetterToAttach:** we refer to the before created letter using the "Form Assistant" ("Create letter1 (Letter)" and "Letter")
- **DocumentGUID:** here we have to link to the generated document. We use the "Form Assistant" again and select "Generate and print document: OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings)" and "MSCRM-ADDONS.com User/Temp Settings".

We save and close the window.

At the end of this condition branch we have to delete the generated document stored in the "MSCRM-ADDONS.com User/Temp"-entity. To achieve this we add the "DeleteTempDocument"-step, give it the name "Remove document1" and define its properties as follows:





We use the "DocumentGUID"-property to refer to the generated document. For that we select "Generate and print document: OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings)" and "MSCRM-ADDONS.com User/Temp Settings".

### 5.2.2.2 Part 2.2: Generate only

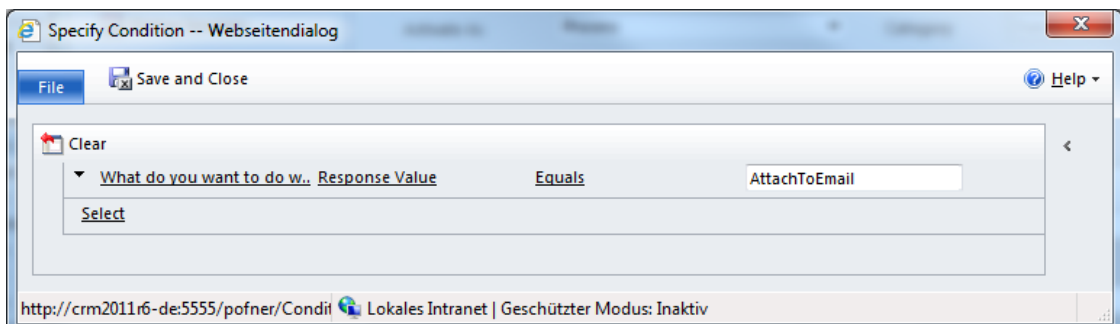
Next we have to focus the else branch of the condition. It will be executed if the user has selected "AttachToEmail" or "AttachToLetter".

First we have to add the "Default Action"-step (else branch) to this if condition.

Then we add a new "CreateDocument"-step with the name "Generate document only" to the else branch. We define the properties same as in the if branch before, except that we leave the "PrintTo"-property empty because we only want to create the document.

Next we have to add a further condition to this else branch. If the user has chosen "AttachToEmail" we have to use an email otherwise ("AttachToLetter") we have to use a letter.

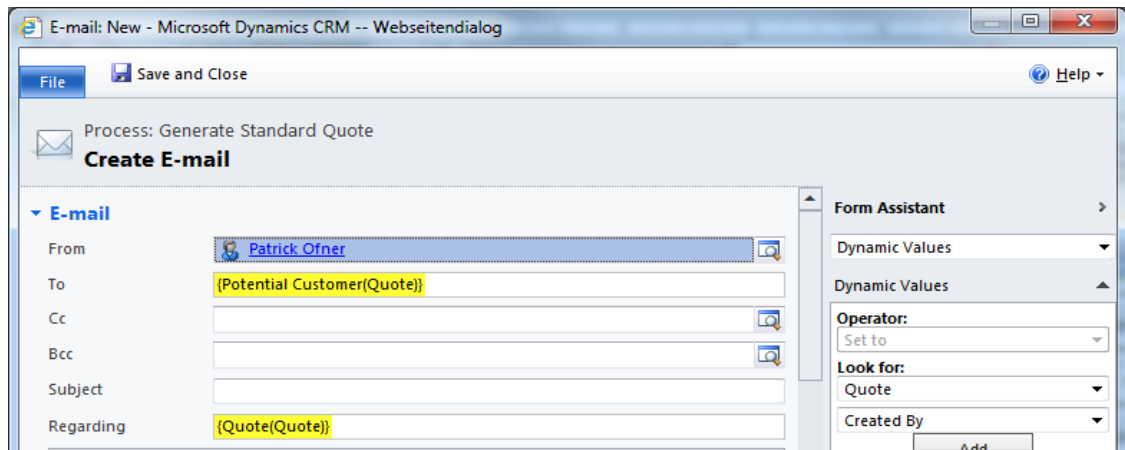
This can be done by adding a new "Check Condition"-step to the dialog. We name it "Email or Letter" and define it as follows:



If the value of "What do you want to do with the document?" is "AttachToEmail" the condition is true otherwise false.

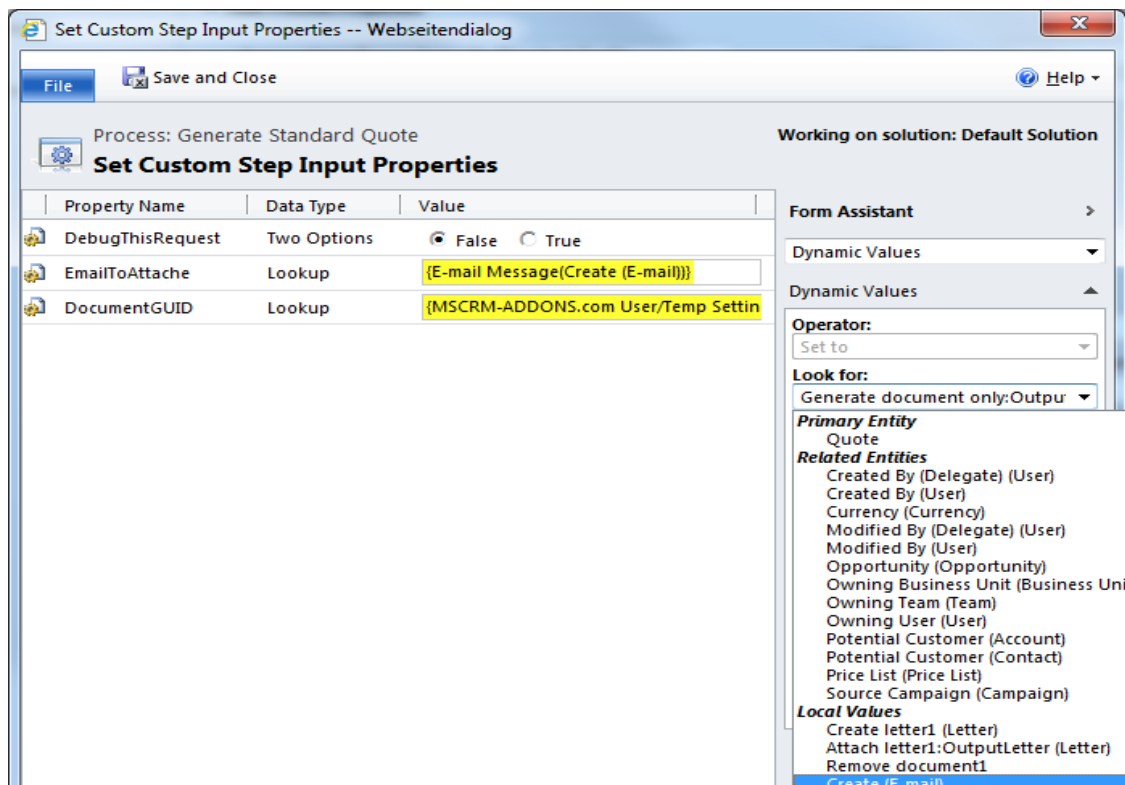
### 5.2.2.2.1 Part 2.2.1: Attach to Email

In the true branch of this condition we create an email by using the "Create Record"-step. We give it the name "Create Email" and define it as shown underneath:



We use any user as sender and the "Potential Customer" as recipient. The "Regarding"-field is set by default.

The next step is to attach the created document to this email. This can be achieved by using the "AttachToEmail" step. We name it "Attach to Email" and adjust its properties.

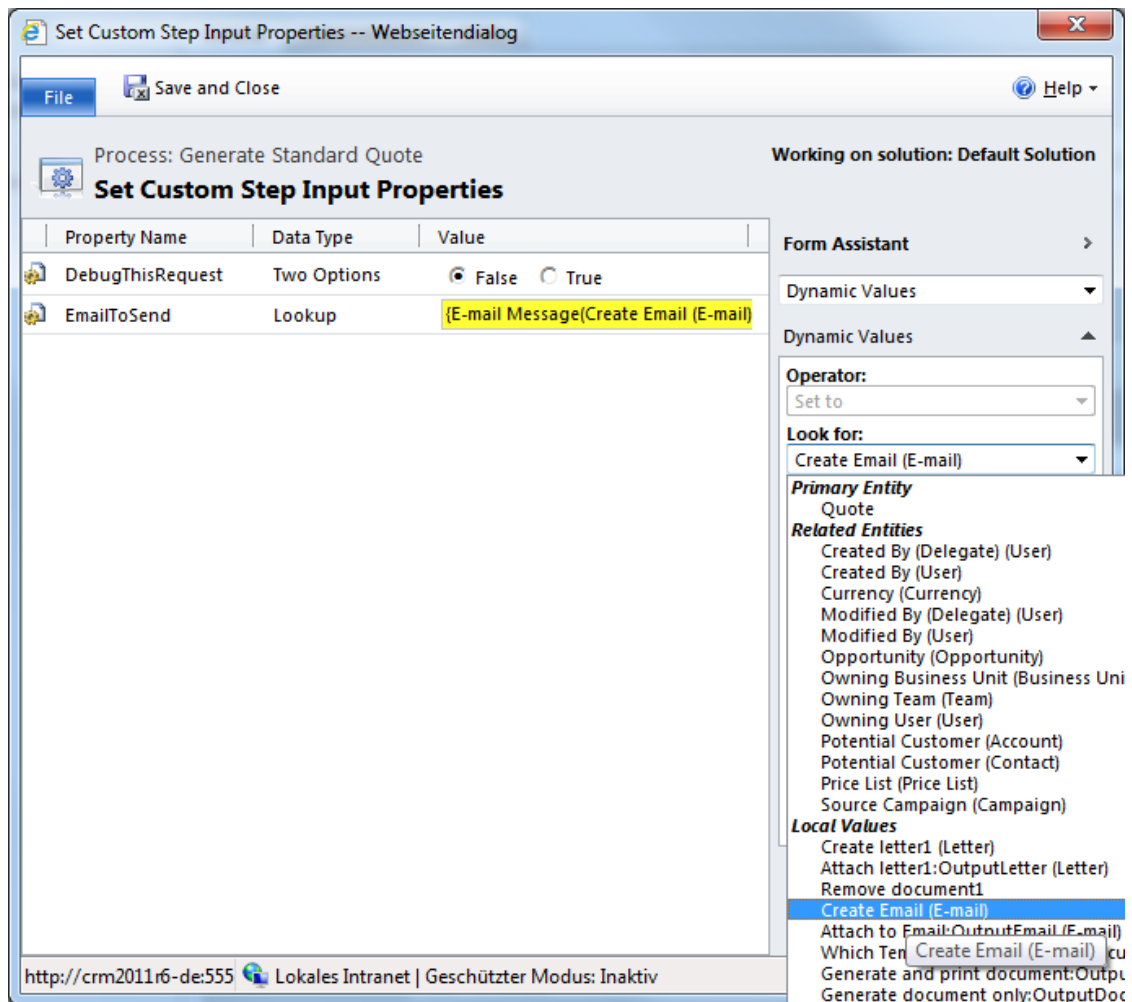


Properties:

- **DebugThisRequest:** we set this property to "False" because we do not need any log files.
- **LetterToAttach:** we refer to the before created email using the "Form Assistant" ("Create (Email)" and "E-mail Message")
- **DocumentGUID:** here we have to link to the generated document. We use the "Form Assistant" again and select "Generate document only: OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings)" and "MSCRM-ADDONS.com User/Temp Settings".

**Important:** If the file type of the generated document is "html" this step will copy its content into the email body. Otherwise the generated document will be added as attachment to the email.

At this time the email is ready to send. We'll use the "SendEmail"-step to do this. We name it "Send Email" and define its properties like this:



Properties:

- **DebugThisRequest:** we set this property to "False" because we do not need any log files.
- **EmailToSend:** we refer to the before created email using the "Form Assistant" ("Create (Email)" and "E-mail Message")

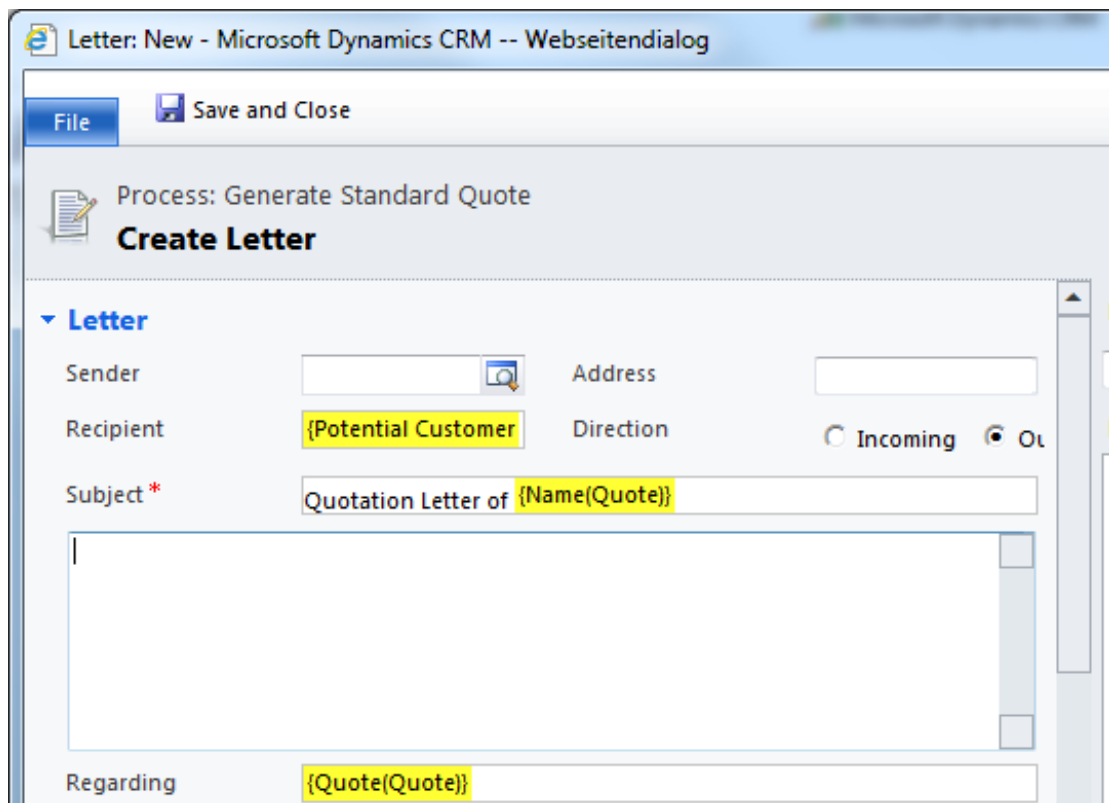
### 5.2.2.2.2 Part 2.2.2: Attach to Letter

Now we have finished the if branch and focus the otherwise way. It will be executed if the user has chosen "AttachToLetter". Here we want to create a letter and attach the generated document to it.

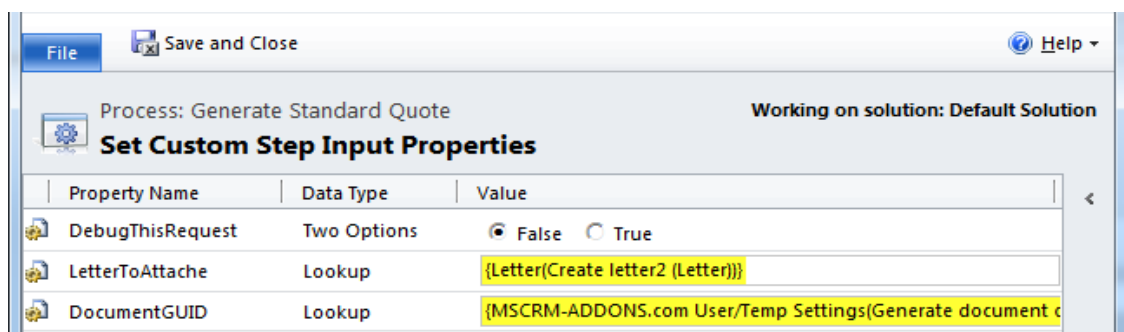
To do this we have to add the "Default Action"-step (else branch) to this condition.

To this else branch we add the following two steps:

"Create Record"-step of the entity "Letter" with the name "Create letter2". We define its properties as shown underneath:

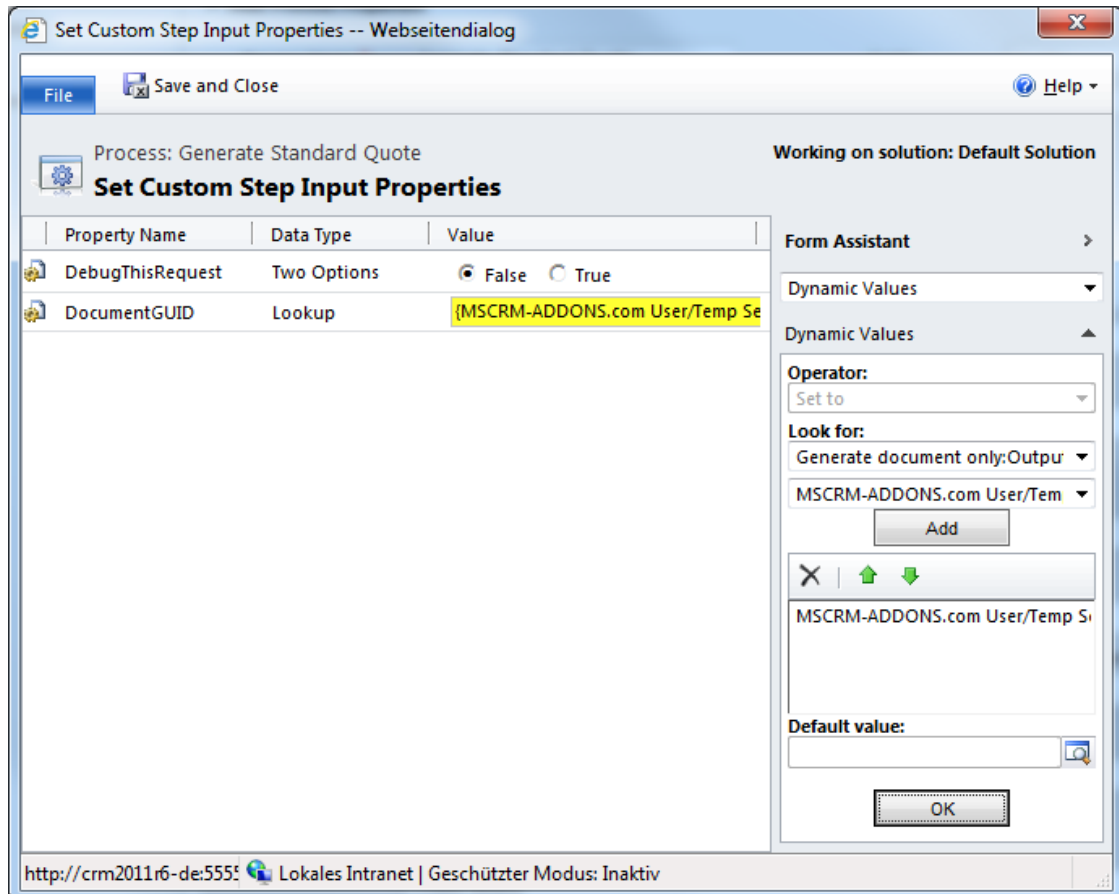


And we add the "AttachToLetter"-step with the name "Attach to letter2" to it. We define its properties as follows (same as in the first "AttachToLetter"-step, except that we select "Create letter2 (Letter)" for "LetterToAttach" and "Generate document only: OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings)" for "DocumentGUID"):



At this point the document is created and attached to an email or a letter. At the end we can delete the temporary document again.

Therefore we add the "DeleteTempDocument"-step outside of the if condition to our dialog. The reason for that is that we want to delete the document in any case ("AttachToEmail" or "AttachToLetter"). We name it "Remove document 2" and define its properties as shown below:



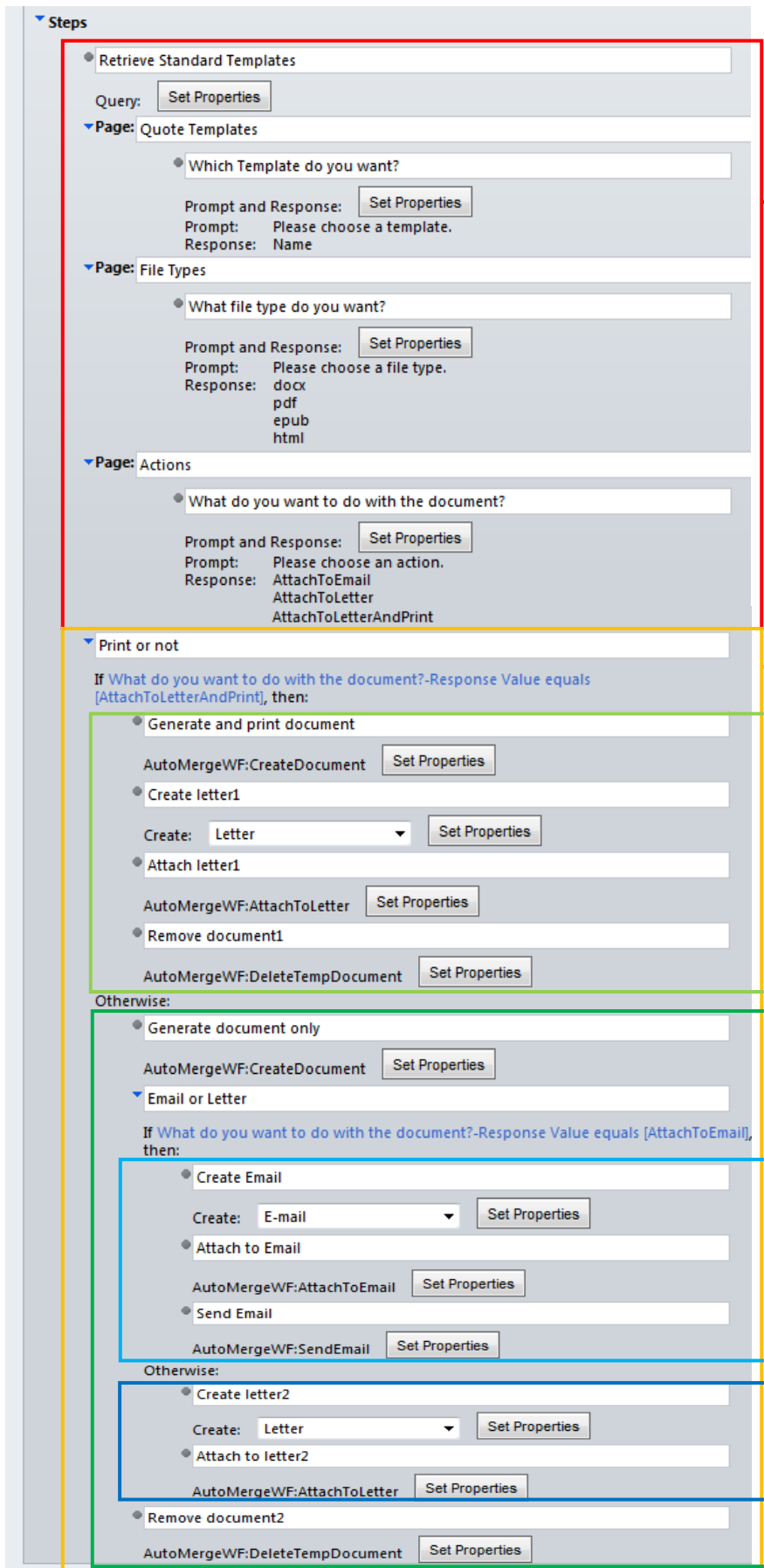
Properties:

- **DebugThisRequest:** we set this property to "False" because we do not need any log files.
- **DocumentGUID:** here we have to link to the generated document. We use the "Form Assistant" again and select "Generate document only: OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings)" and "MSCRM-ADDONS.com User/Temp Settings".

Now we are finished.

After the dialog has been activated, it can be used.

### 5.2.3 Result dialog



**Steps**

- Retrieve Standard Templates
  - Query:
  - Page: Quote Templates
    - Which Template do you want?
      - Prompt and Response:
      - Prompt: Please choose a template.
      - Response: Name
  - Page: File Types
    - What file type do you want?
      - Prompt and Response:
      - Prompt: Please choose a file type.
      - Response: docx  
pdf  
epub  
html
  - Page: Actions
    - What do you want to do with the document?
      - Prompt and Response:
      - Prompt: Please choose an action.
      - Response: AttachToEmail  
AttachToLetter  
AttachToLetterAndPrint
- Print or not
  - If **What do you want to do with the document?-Response Value equals [AttachToLetterAndPrint]**, then:
    - Generate and print document
      - AutoMergeWF:CreateDocument
      - Create letter1
        - Create: Letter
      - Attach letter1
        - AutoMergeWF:AttachToLetter
      - Remove document1
        - AutoMergeWF>DeleteTempDocument
    - Otherwise:
      - Generate document only
        - AutoMergeWF:CreateDocument
      - Email or Letter
        - If **What do you want to do with the document?-Response Value equals [AttachToEmail]**, then:
          - Create Email
            - Create: E-mail
          - Attach to Email
            - AutoMergeWF:AttachToEmail
          - Send Email
            - AutoMergeWF:SendEmail
        - Otherwise:
          - Create letter2
            - Create: Letter
          - Attach to letter2
            - AutoMergeWF:AttachToLetter
          - Remove document2
            - AutoMergeWF>DeleteTempDocument

Part 1: User Interaction

Part 2: AutoMerge steps

Part 2.1: Generate and print

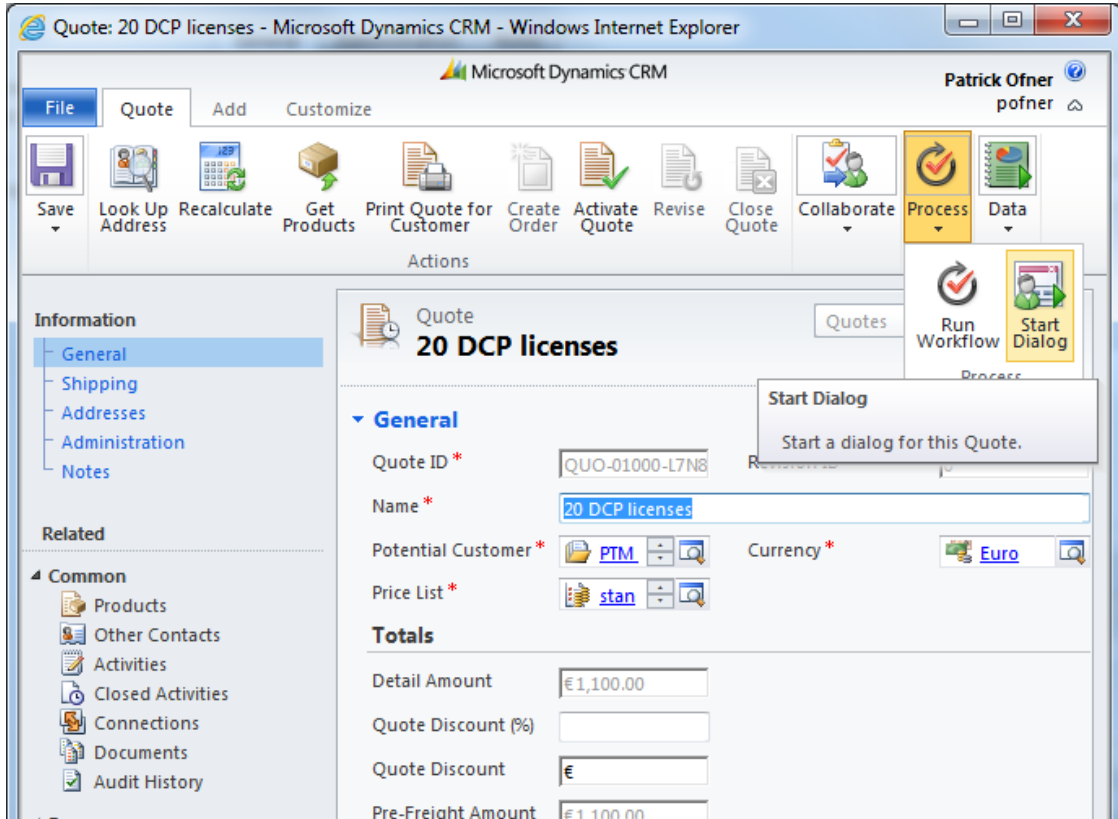
Part 2.2: Generate only

Part 2.2.1: Attach to Email

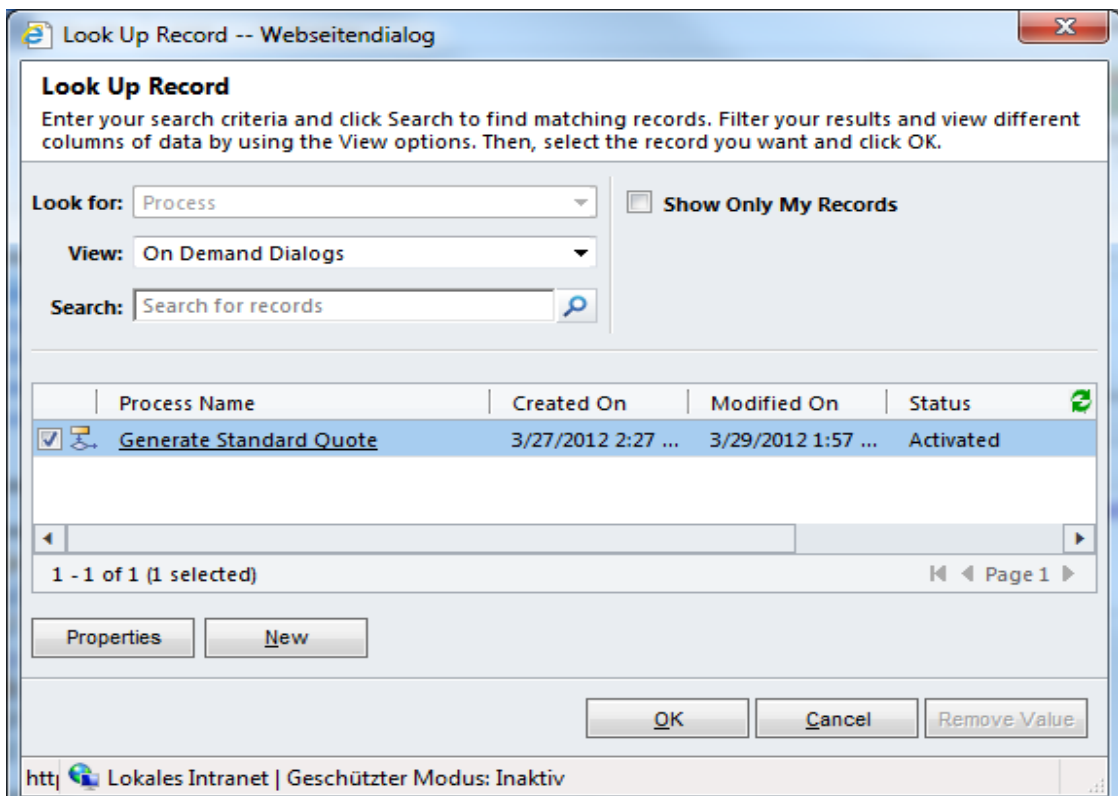
Part 2.2.2: Attach to Letter

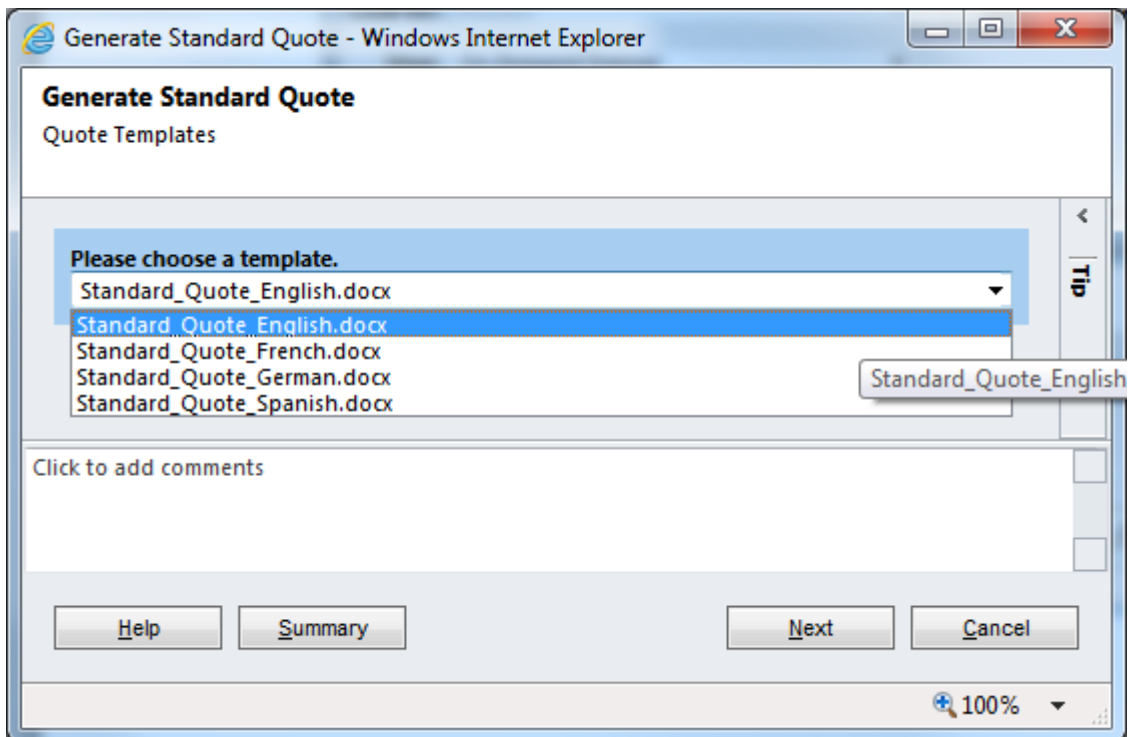
## 5.2.4 Test Dialog

To start our dialog we open a quote and hit "Start Dialog".

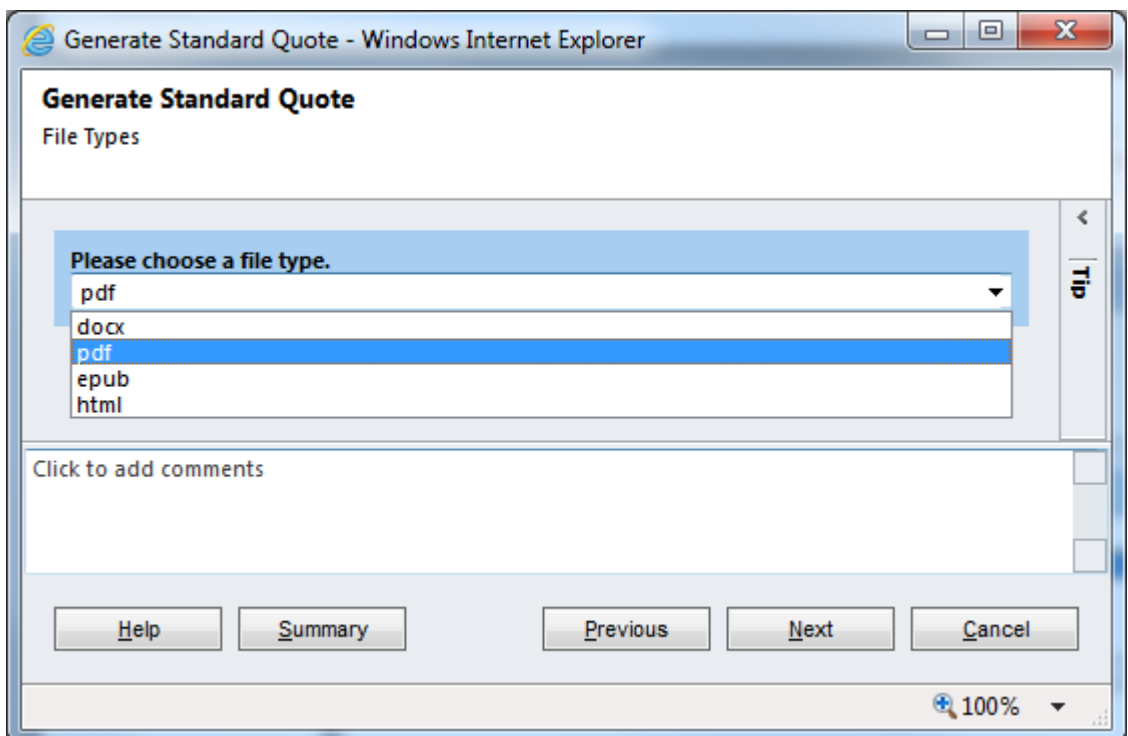


Thereupon we choose our dialog and hit [Ok]:



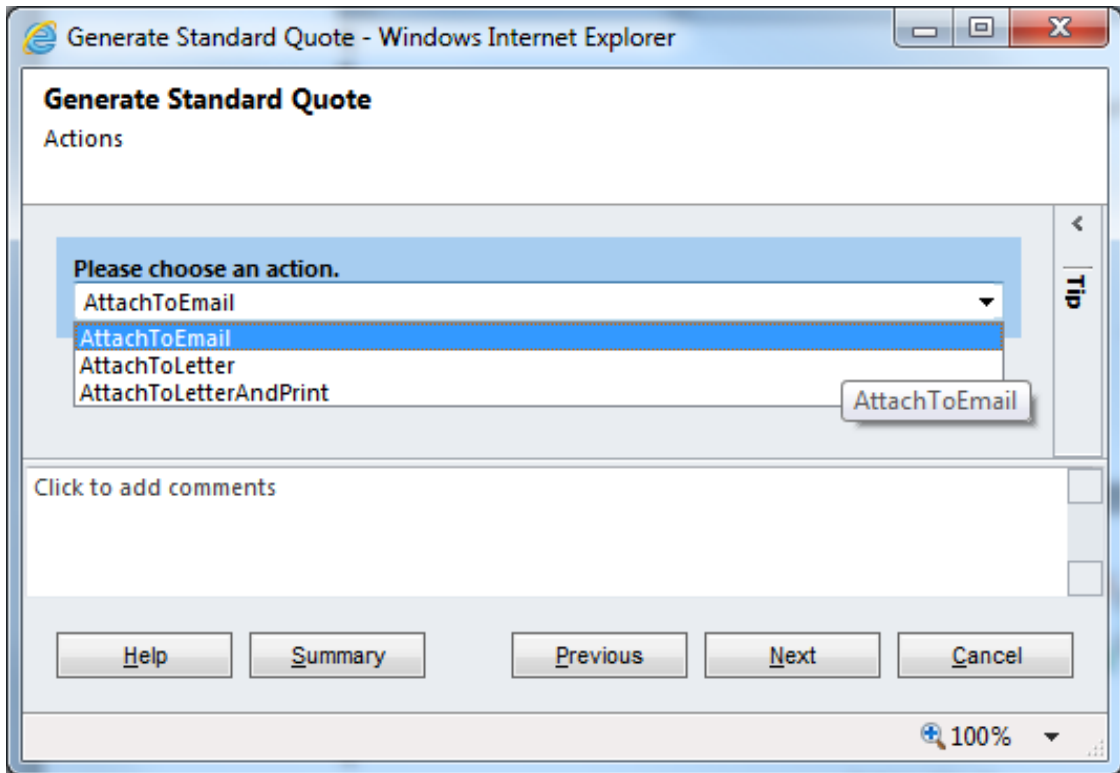


Frist we can choose between all standard templates. We choose "Standard\_Quote\_“English.docx” and hit [Next].

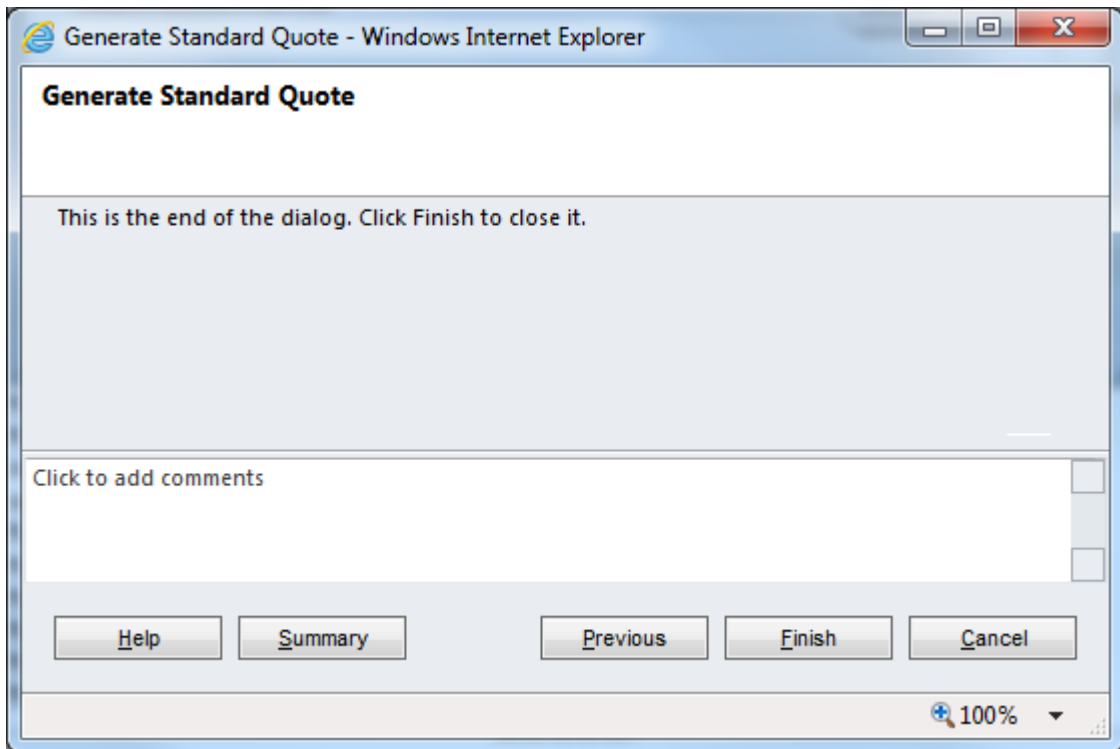


In this window we have the possibility to select the file type. We choose "pdf" and hit [Next] to continue.



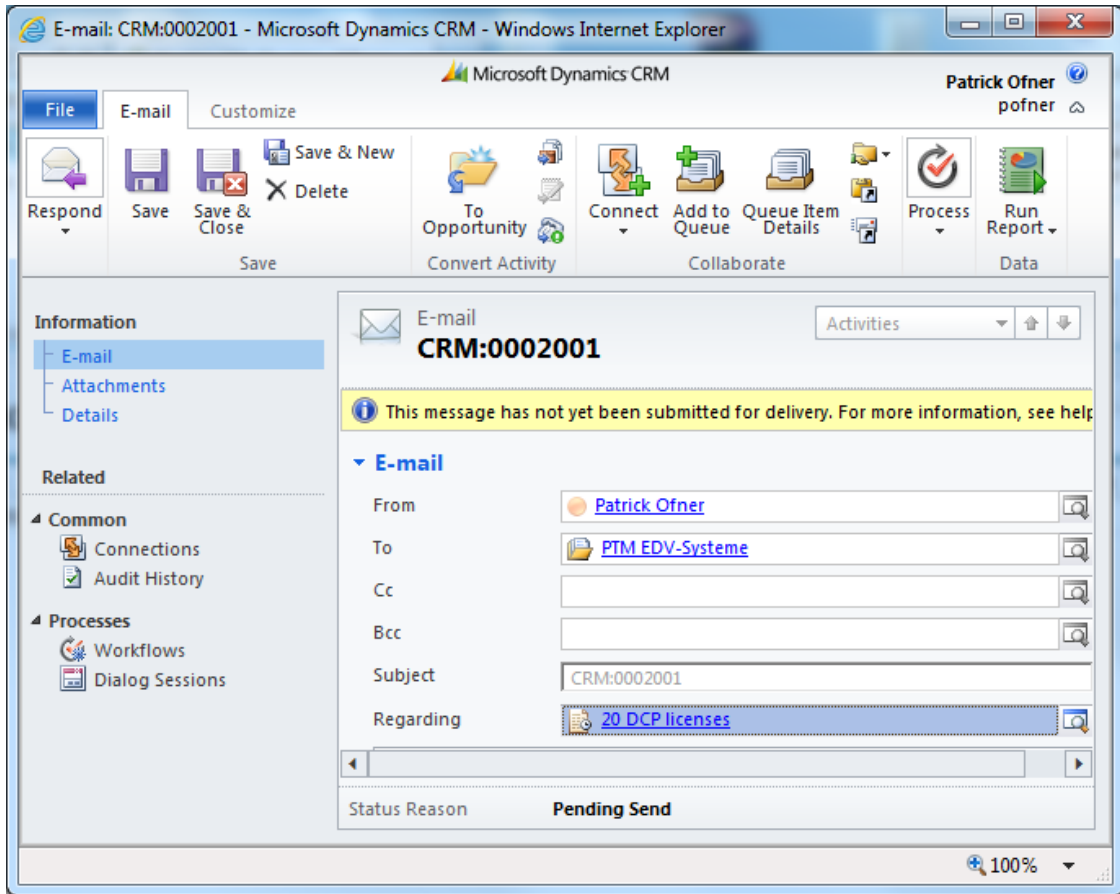


Then we can define what should happen with the generated document. We select "AttachToEmail" and hit [Next] to proceed.

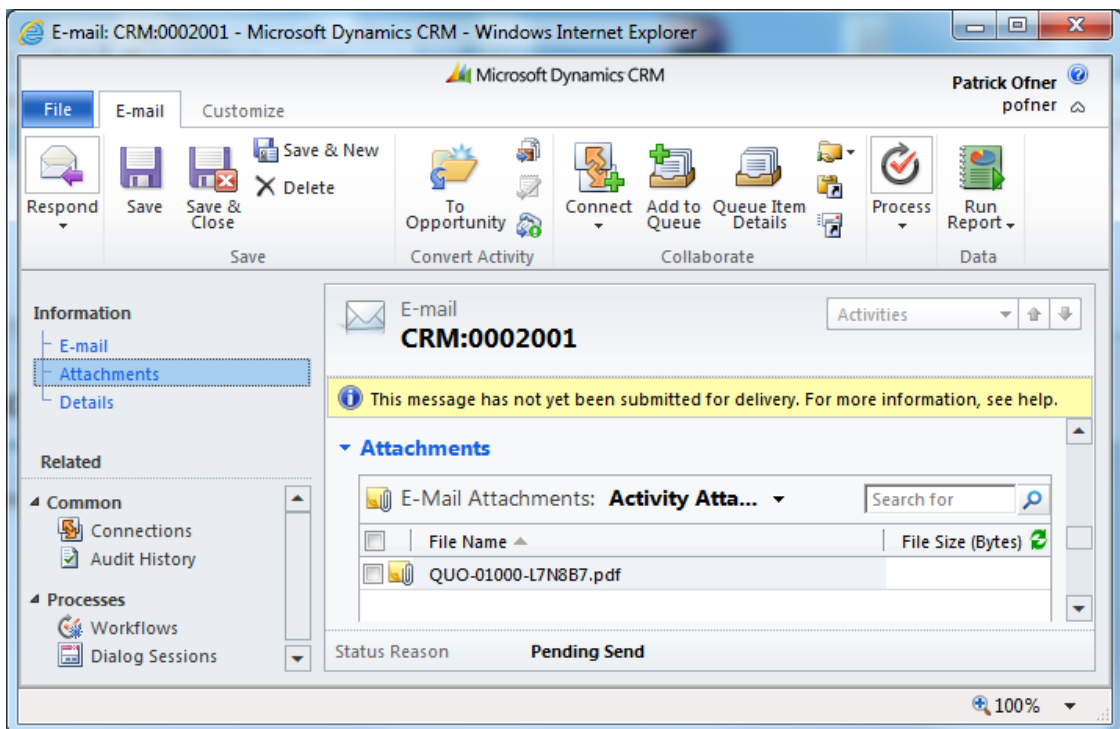


After a short time this window will pop up and let us know that the dialog has ended. We hit [Finish] to close it.

Then we navigate to the "Closed Activities"-area of this quote. There we can find the Email:



In the "Attachment"-area we can see the generated document stored as pdf.



Demo-Company Inc., 1234-Demo Road



**PTM EDV-Systeme**  
**To: Mr. James Elliott**  
**Bahnhofgürtel 59,Graz8020 - Austria**

Dear Mr. James Elliott,

Thanks for the interest in our products. Regarding your request per e-mail from 3/30/2012, we can offer you the following:

No.	Product Name	Price	Qty.	Amount
<b>Default Subject</b>				
5454654 6546	<b>Documents Core Pack CRM 2011</b>	€56.00	20	€1,120.00
<b>Group Default Subject total:</b>				<b>1.120,00 €</b>

**Total:€1,120.00**

This quote is valid for XX days from today.

**Terms and conditions conditions:**

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**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.

## 6 Contact

If you have got problems with this product, please consult our Knowledge-Base at <http://support.mscrm-addons.com> ,

Or contact us:

Email: [support@mscrm-addons.com](mailto:support@mscrm-addons.com)

Tel.-Nr.: +43 316 680 880 0