



mscrm-addons.com

Document Core Pack
for MS CRM 2011

DocumentsCorePack for MS CRM 2011 Implementation Guide

Version 5.0

Implementation Guide
(How to install/uninstall)

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1 Common Information

Before installing DocumentsCorePack Server for MS CRM 2011, please read this document and follow the steps carefully.

1.1 Intended Audience

This guide is intended for system administrators who are familiar with the following administrative tasks:

- Maintaining and configuring SQL Server databases
- Maintaining and configuring IIS based Web Sites / Applications
- Maintaining and configuring a Microsoft CRM Server

The installation consists of the following steps:

Follow each of the following steps, to complete the installation:

- Installing DocumentsCorePack Server for MS CRM 2011.
- Configuring DocumentsCorePack

2 License

The product comes with a 14-days trial license.

Information about licensing can be found on www.mscrm-addons.com

3 Prerequisites

3.1 Microsoft .NET Framework 4.0 RTM is required

The RTM version of Microsoft .NET Framework 4.0 is required.

3.2 Supported CRM Versions

- Microsoft Dynamics CRM 2011 RTM On Premise
- Microsoft Dynamics CRM 2011 RTM Online

3.3 Windows Identity Foundation

Will be installed as part of the DocumentsCorePack Server Setup.

3.4 Supported Operating Systems

- Windows 7 32/64bit
- Windows Vista 32/64bit
- Windows Server 2008 32/64bit
- Windows Server 2008 R2 32/64bit

4 Installation Server Component

You could install DocumentsCorePack Server for Microsoft Dynamics CRM 2011 on every supported operating system which is able to connect to your CRM 2011 Server.

During the installation you have to specify at least one organization in which DocumentsCorePack Server will be installed.

Possible Installation Scenarios

1. Install direct on a CRM 2011 On Premise Server

You could install DCP Server direct on a CRM 2011 On Premise installation. Then you will have full functionality like File Explorer or SharePoint Integration. When you specify a On Premise Connection Profile you have to run the setup on the CRM Server.

2. Install for CRM Online

When you want to use CRM Online, you could install DCP on every supported operating system. You have to specify a valid CRM Online profile. In that scenario you have limited functionality of DocumentsCorePack Server. You could not use the following features

- a. SharePoint Folder and Site Integration
- b. File Explorer Integration
- c. Document Summary

Attention: After the setup is completed, you could start the DocumentsCorePack Server Configuration in the Windows Start Menu to install and configure DocumentsCorePack Server into other CRM Organizations.

4.1 Intro

Run the DocumentsCorePack Server for MS CRM 2011 Setup file.
The following window will appear:



Click [Next] to proceed.

INFORMATION: If an upgrade is detected, a message will be shown and the setup will go to chapter 4.4 directly after accepting the EULA [4.2]

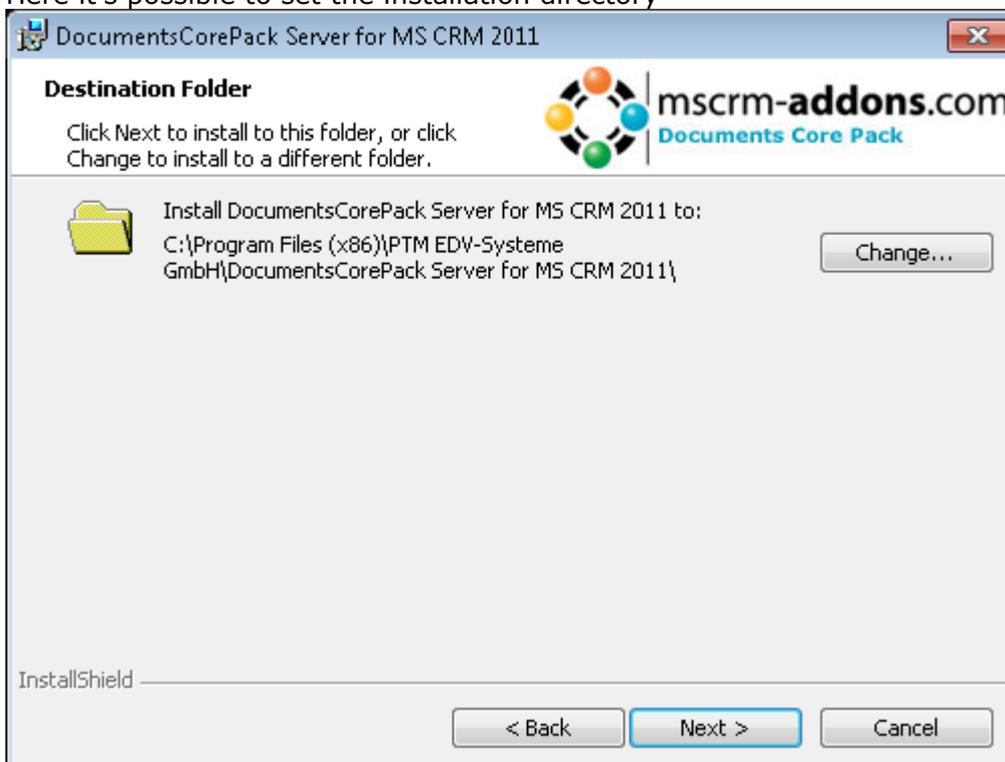
4.2 EULA (End User License Agreement)



Click [Next] to proceed.

4.3 Folder Selection

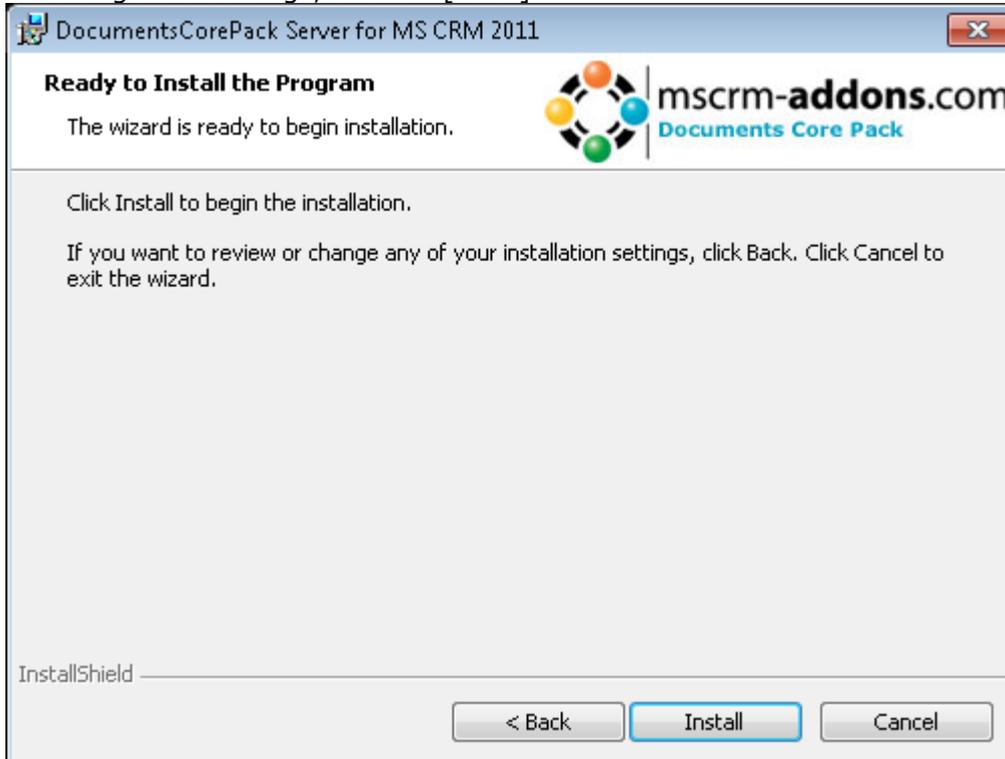
Here it's possible to set the installation directory



Click [Change] to specify a different installation path.
Click [Next] to proceed.

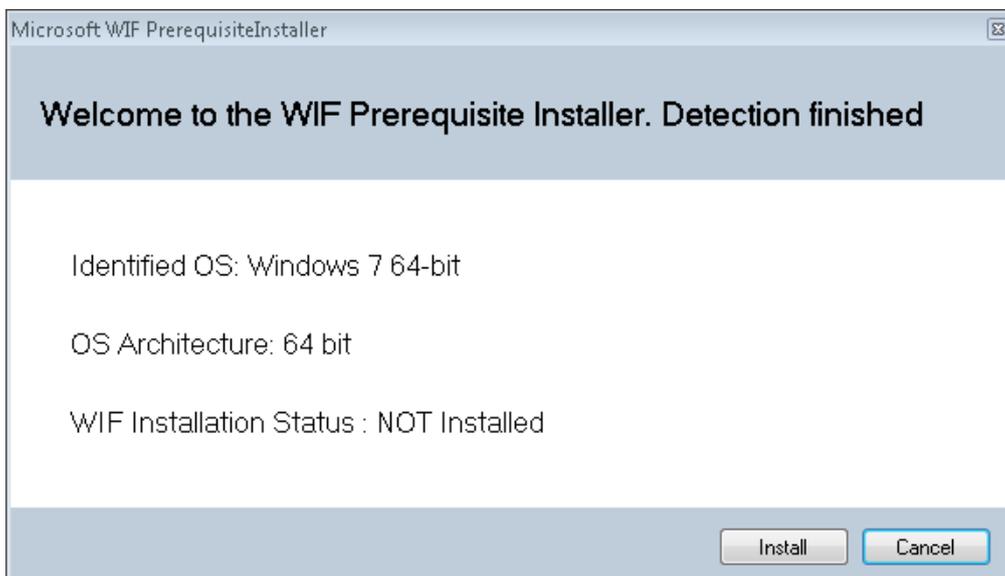
4.4 Confirm Installation

To start the installation, click on [Install].
To change the settings, click on [Back].



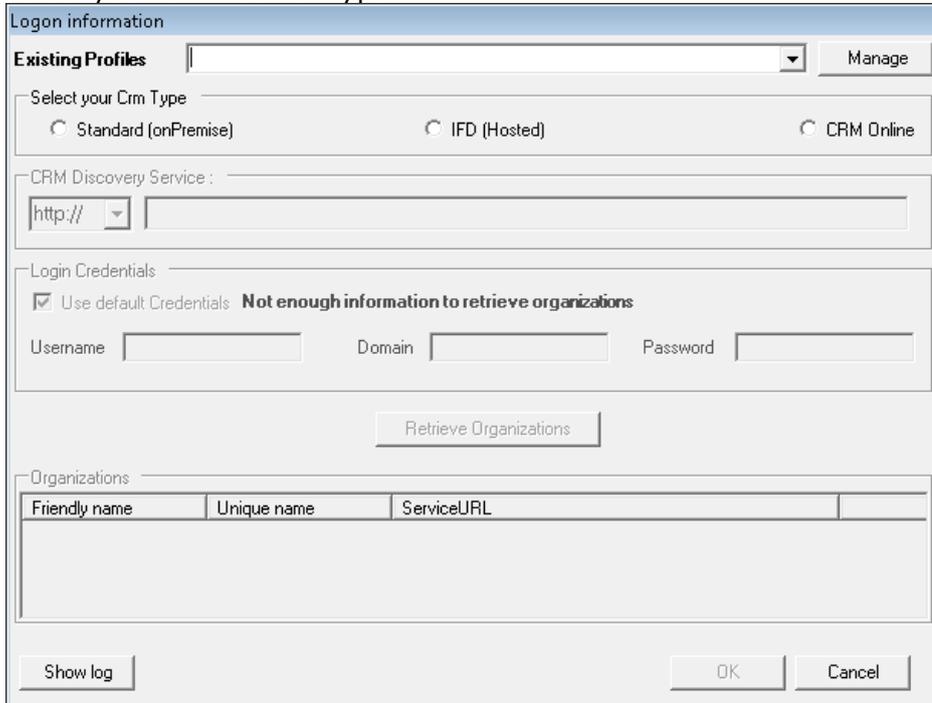
4.5 Install Windows Identity Foundation

To use DocumentsCorePack Server for MS CRM 2011 you have to install the Windows Identity Foundation. This window will only pop up when the Windows Identity Foundation is not installed.



4.6 Configure CRM Server

To configure your CRM Server, select your Profile or create a new profile and select your CRM Server type:



Logon information

Existing Profiles: [] Manage

Select your Crm Type

Standard (onPremise) IFD (Hosted) CRM Online

CRM Discovery Service : http:// []

Login Credentials

Use default Credentials **Not enough information to retrieve organizations**

Username [] Domain [] Password []

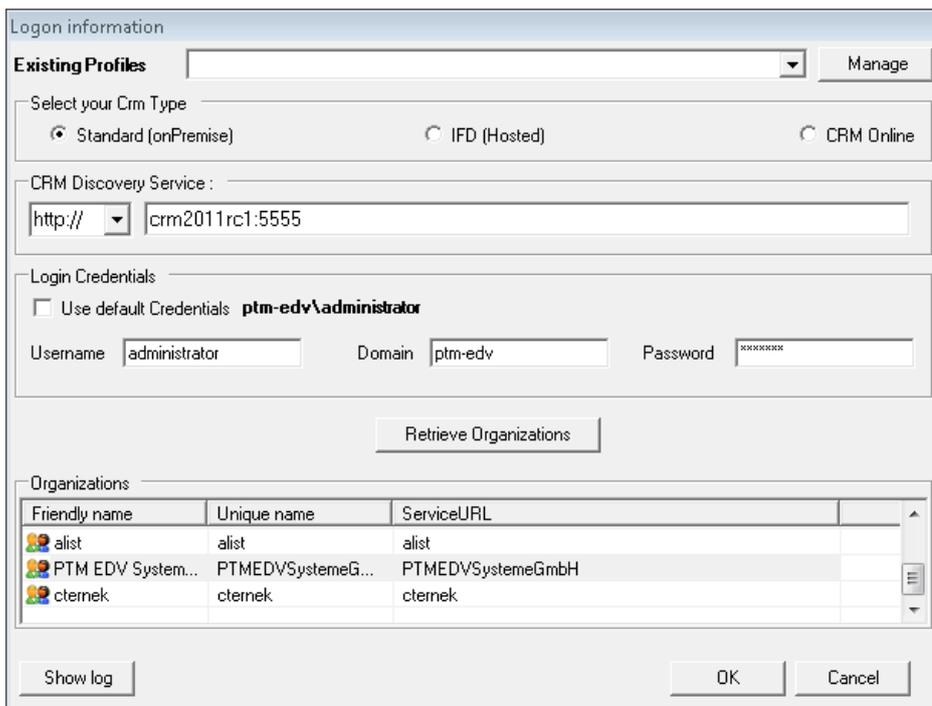
Retrieve Organizations

Organizations

Friendly name	Unique name	ServiceURL
---------------	-------------	------------

Show log OK Cancel

Choose the server path and add your login credentials by filling in the field's username, password and domain or choose the default credentials. As soon as the Organizations are retrieved press the "OK"-button.



Logon information

Existing Profiles: [] Manage

Select your Crm Type

Standard (onPremise) IFD (Hosted) CRM Online

CRM Discovery Service : http:// [crm2011rc1:5555]

Login Credentials

Use default Credentials **ptm-edv\administrator**

Username administrator Domain ptm-edv Password []

Retrieve Organizations

Organizations

Friendly name	Unique name	ServiceURL
alist	alist	alist
PTM EDV System...	PTMEDVSystemeG...	PTMEDVSystemeGmbH
cternek	cternek	cternek

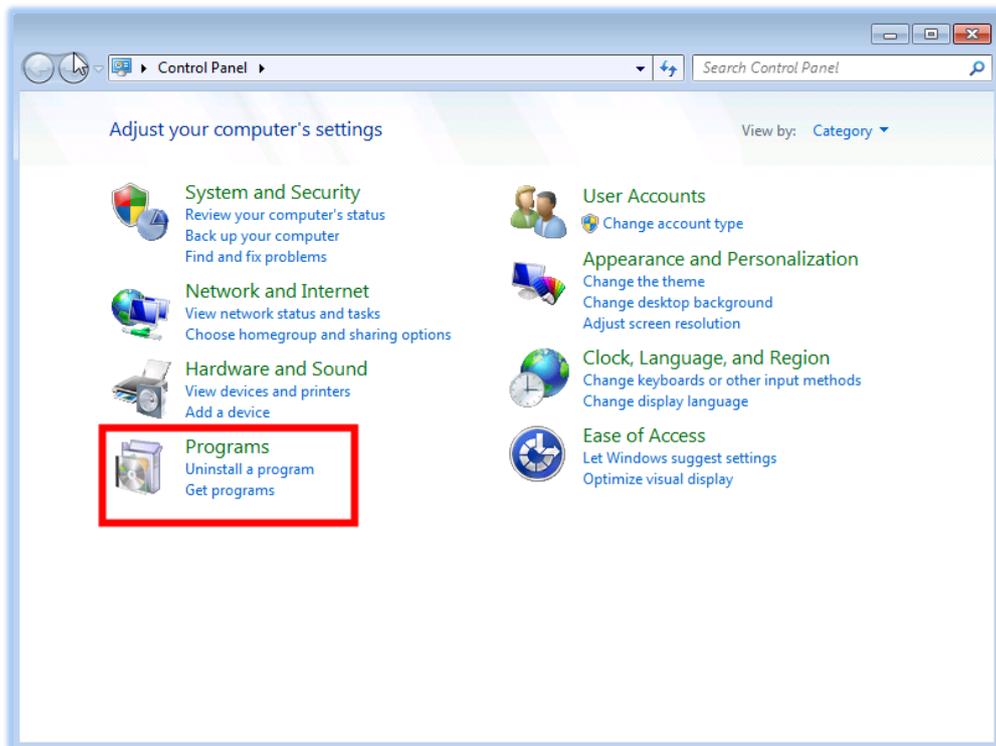
Show log OK Cancel

4.7 Finish

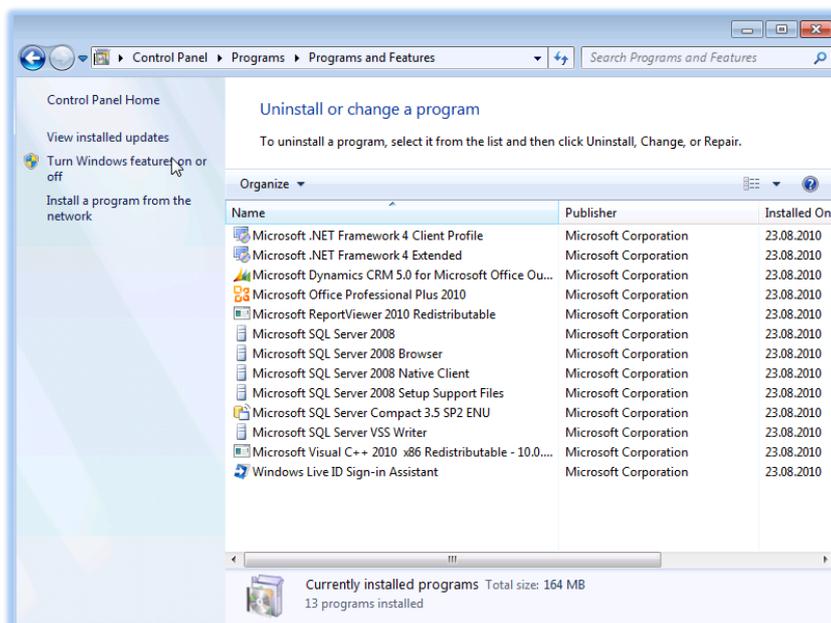
The DocumentsCorePack Server Configuration will start automatically for the organization you selected during the setup.

5 Uninstall Server Component

To uninstall DocumentsCorePack Server for MS CRM 2011 select Programs in Control Panel.



Search for DocumentsCorePack Server CRM 2011 in "Uninstall or change a program" to uninstall DocumentsCorePack Server. Follow the instructions to uninstall DocumentsCorePack Server.



6 Installing the client component

6.1 Installing Documents Core Pack Client

IMPORTANT Before installing the components:

1. **Close all Office products (MS WORD, MS Outlook,..)**
2. **Be sure that the machine is online to the MS CRM server**

To go sure you can verify that Word and Outlook not are running, by starting the Windows **Task manager**, and checking that WINWORD.EXE and OUTLOOK.EXE are not running in the processes list.

Install the component on the client:

1. Run the "Documents Core Pack Client for MS CRM 2011.exe" Setup file. You will see following window:



Click Next ->

2. End User License Agreement(EULA)



License Agreement

Please read the following license agreement carefully.

FORM OF END USER LICENSE AGREEMENT

MSCRM-ADDONS.COM SOFTWARE LICENSE AGREEMENT

IMPORTANT: THIS SOFTWARE LICENSE AGREEMENT ("LICENSE AGREEMENT") IS A LEGAL AGREEMENT BETWEEN CLIENT AND MSCRM-ADDONS.COM. READ IT CAREFULLY BEFORE USING THE SOFTWARE. IT PROVIDES A LICENSE TO USE THE SOFTWARE AND CONTAINS WARRANTY INFORMATION, LIABILITY DISCLAIMERS AND

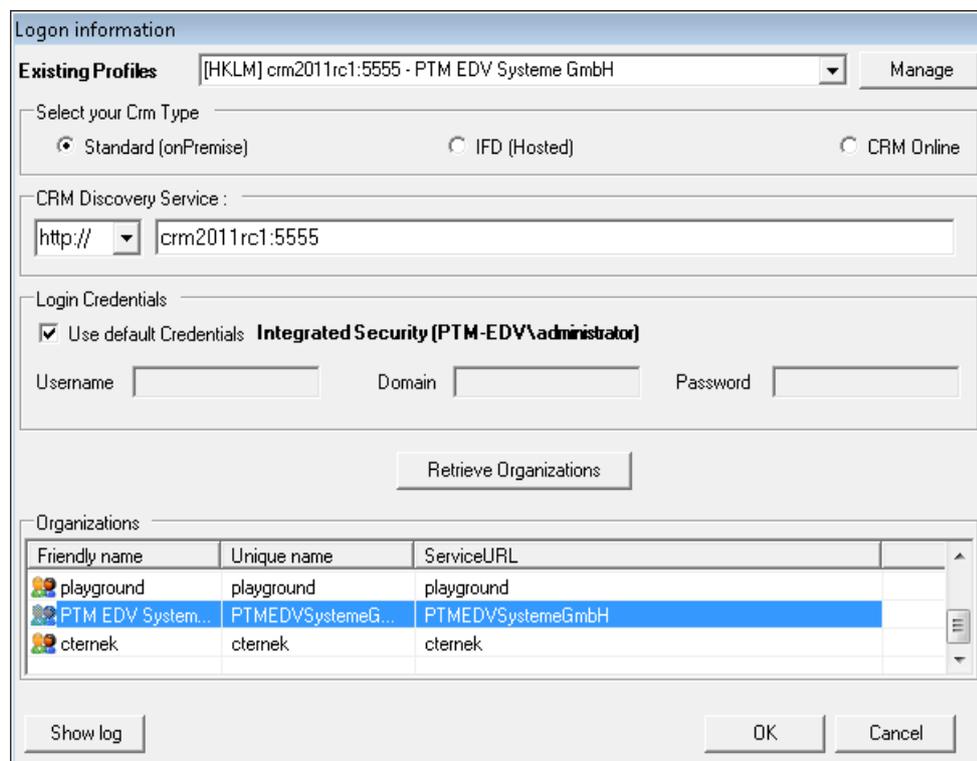
I accept the terms in the license agreement I do not accept the terms in the license agreement

Print

InstallShield

< Back Next > Cancel

MSCRM Server



Logon information

Existing Profiles: [HKLM] crm2011rc1:5555 - PTM EDV Systeme GmbH Manage

Select your Crm Type

Standard (onPremise) IFD (Hosted) CRM Online

CRM Discovery Service:

http:// crm2011rc1:5555

Login Credentials

Use default Credentials **Integrated Security (PTM-EDV\\administrator)**

Username: Domain: Password:

Retrieve Organizations

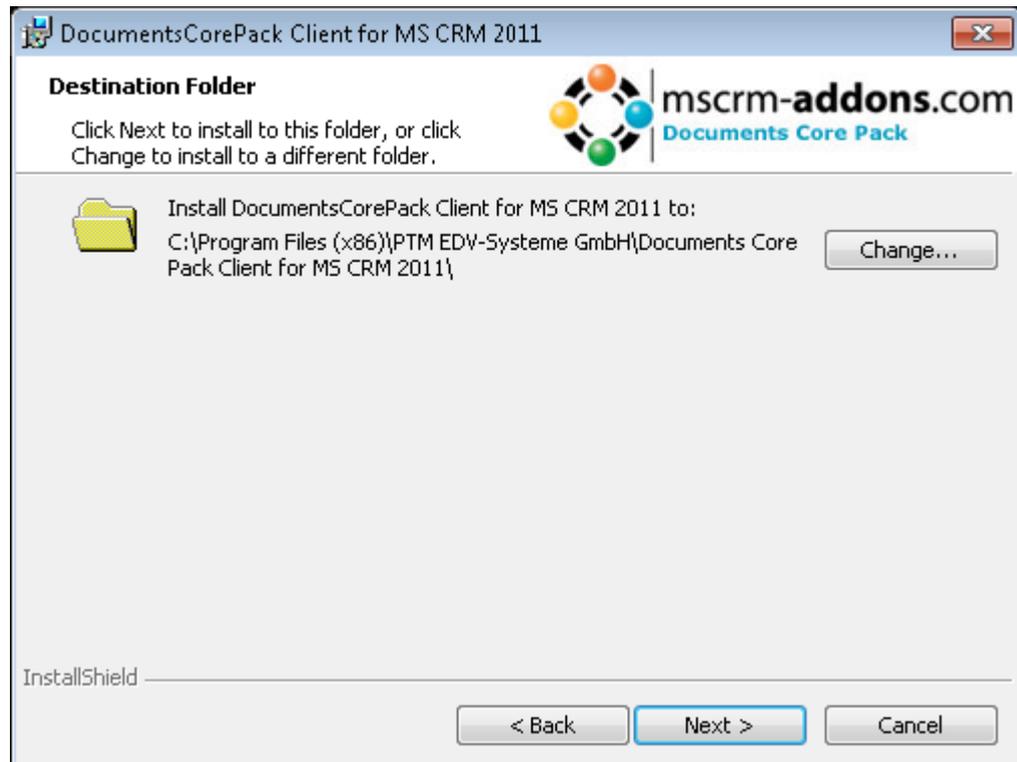
Friendly name	Unique name	ServiceURL
playground	playground	playground
PTM EDV System...	PTMEDVSystemeG...	PTMEDVSystemeGmbH
cternek	cternek	cternek

Show log OK Cancel

Enter on this page the Name of the CRM Server.
This is the name you enter in the Internet Explorer(without http://).
Also enter the port number if it is not standard

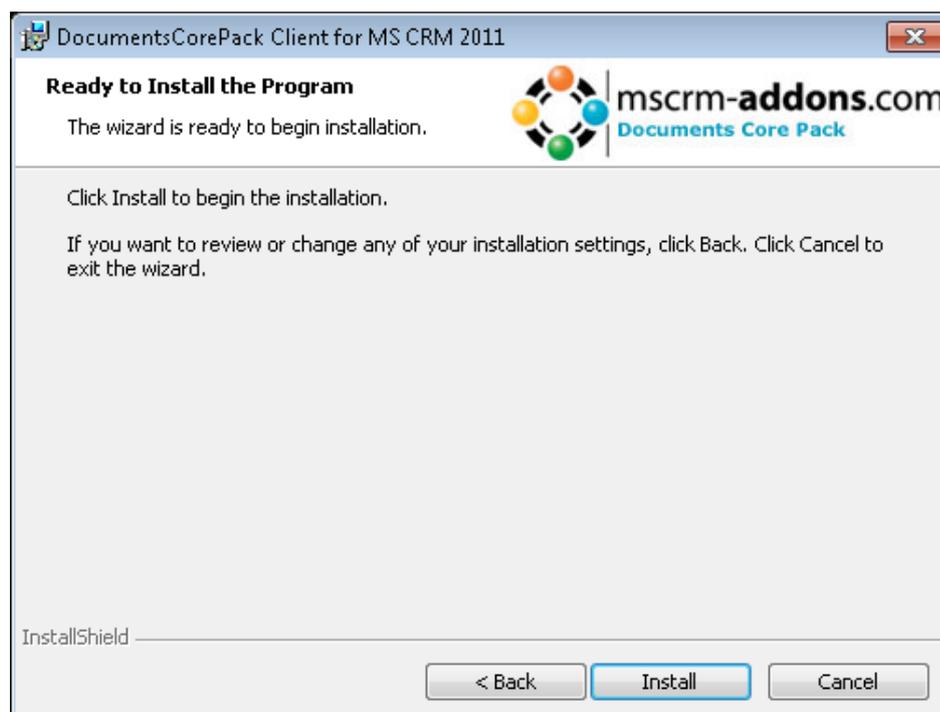
Click "OK" ->

3. Select Installation folder



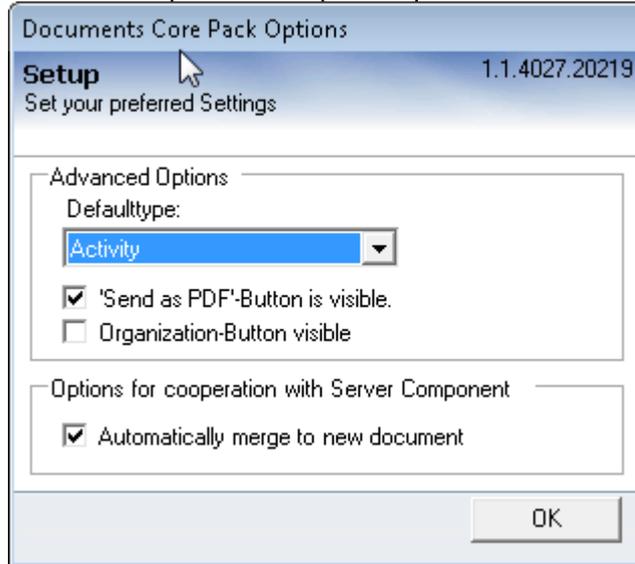
Click Next ->

4. Confirm Installation

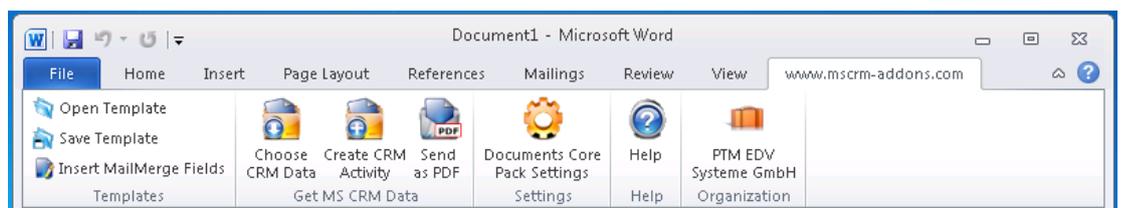
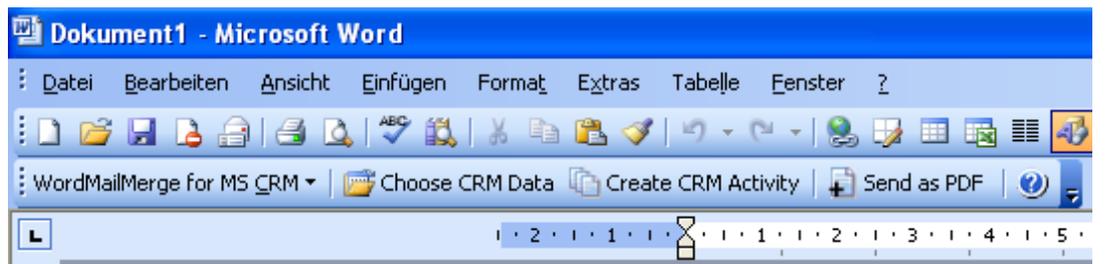


Click Install->

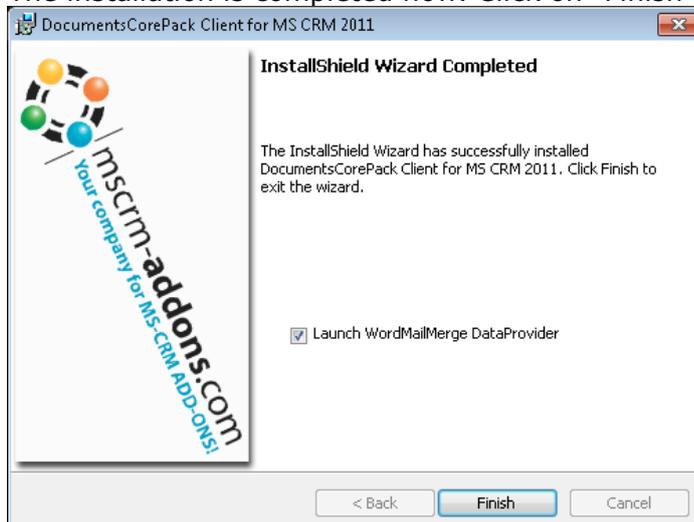
- Choose the preferred options you want to use and click OK



- After the installation ended go to your MS Word and you will see following new Toolbar with the Buttons "Documents Core Pack for MS CRM", "Choose CRM Data", "Create CRM activity" and the optional buttons "Send as PDF" and "Get My Data":



- The installation is completed now. Click on "Finish".

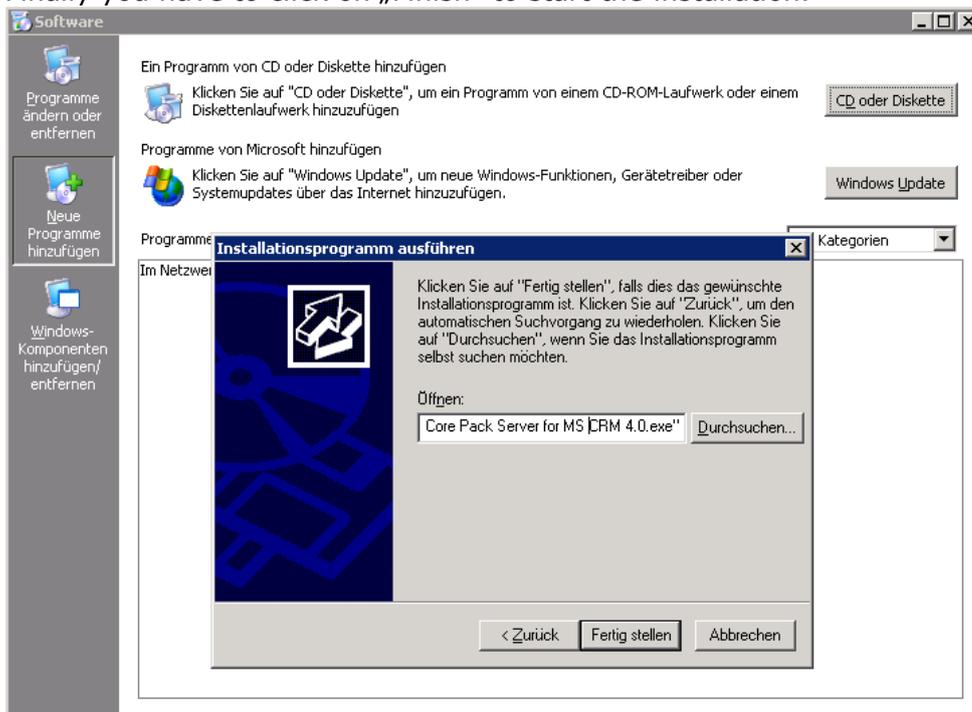


6.2 Installation on a Terminal Server

To install Documents Core Pack on a Terminal Server, you must open the Control Panel, then open the Add/Remove Programs-option and click on the „Add new programs“ button.

Now click on the „CD or floppy disc“-button to open the installation wizard and chose the DCP-Setup-file.

Finally you have to click on „Finish“ to start the installation.



You will see following window:

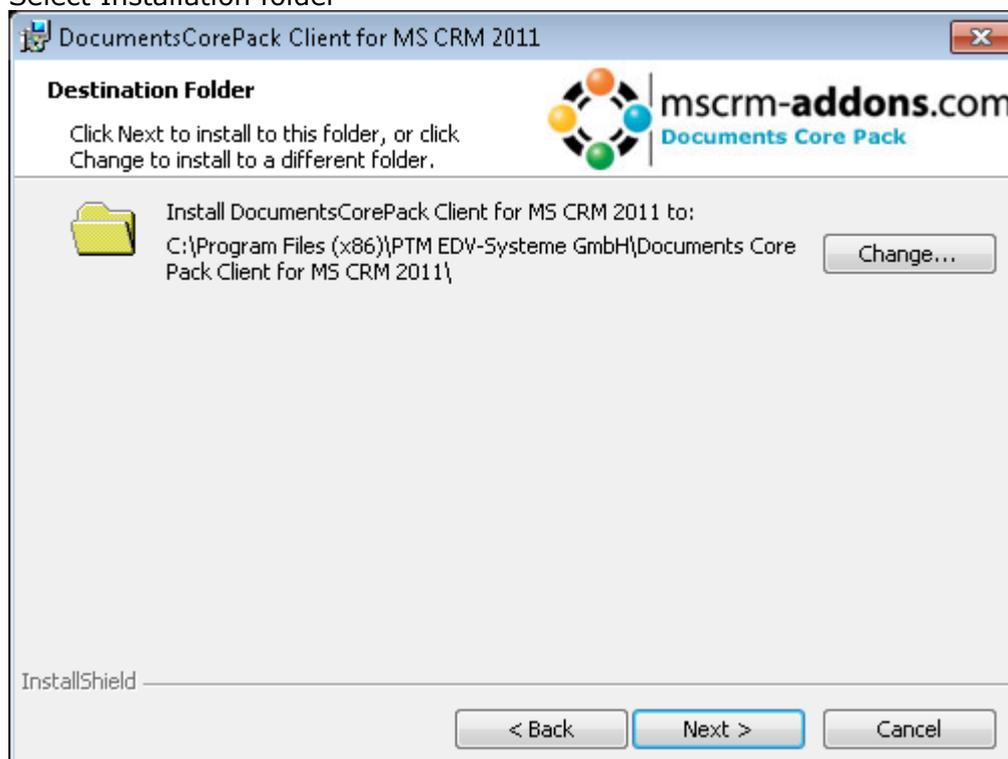


Click „Next“

End User License Agreement (EULA)

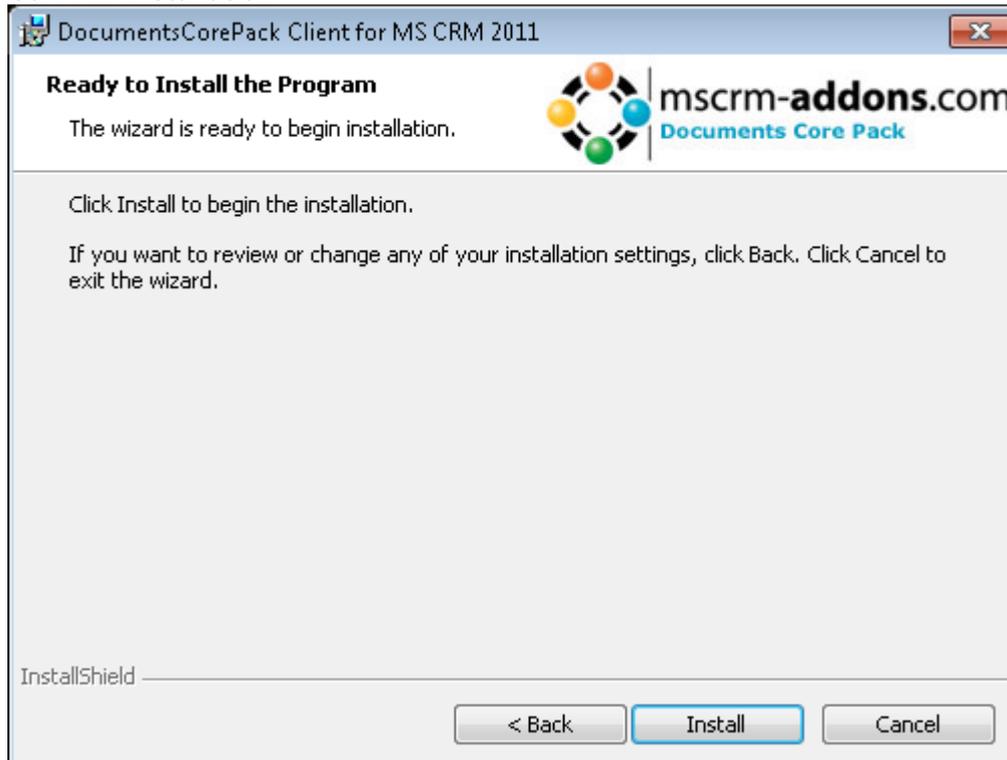


Select Installation folder



Click „Next“

Confirm Installation

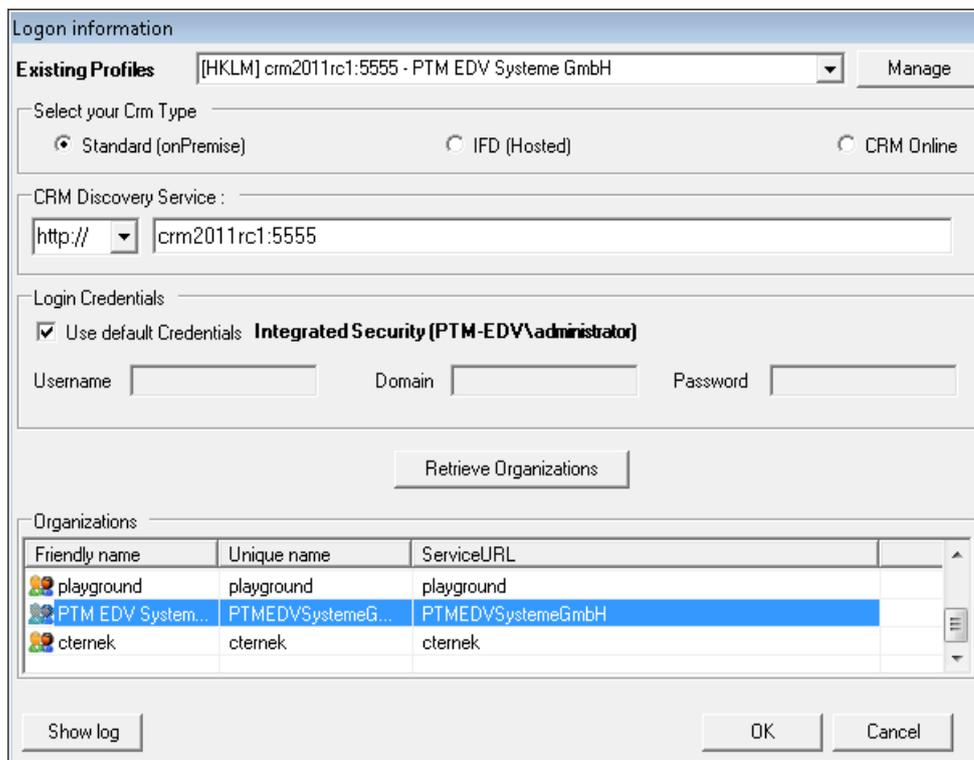


Click „install“

In the connection-dialog you have to enter the CRM servername with the port.

(eg : servername : crm, port : 5555)

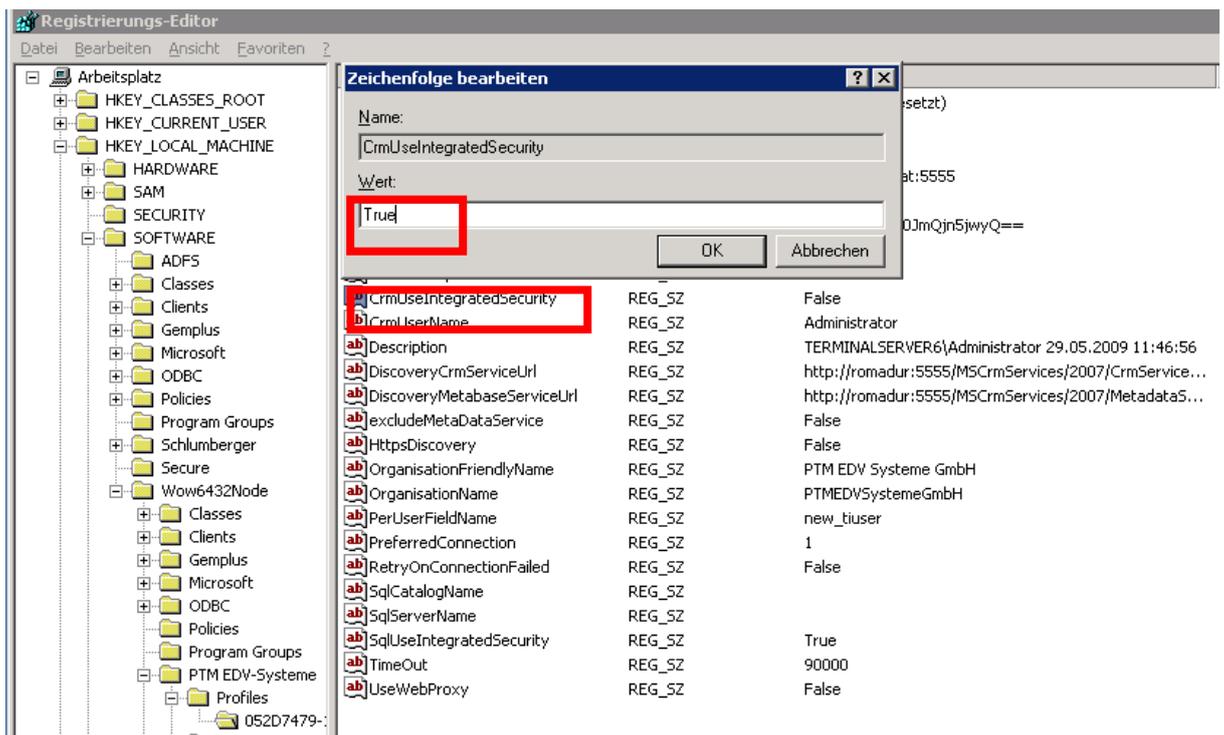
When installing on Terminal Server, you have to change the "Login Credentials". Uncheck the "Use default Credentials" and enter a valid username, domain and password.



IMPORTANT: Finally you have to change a registry entry to use integrated security.

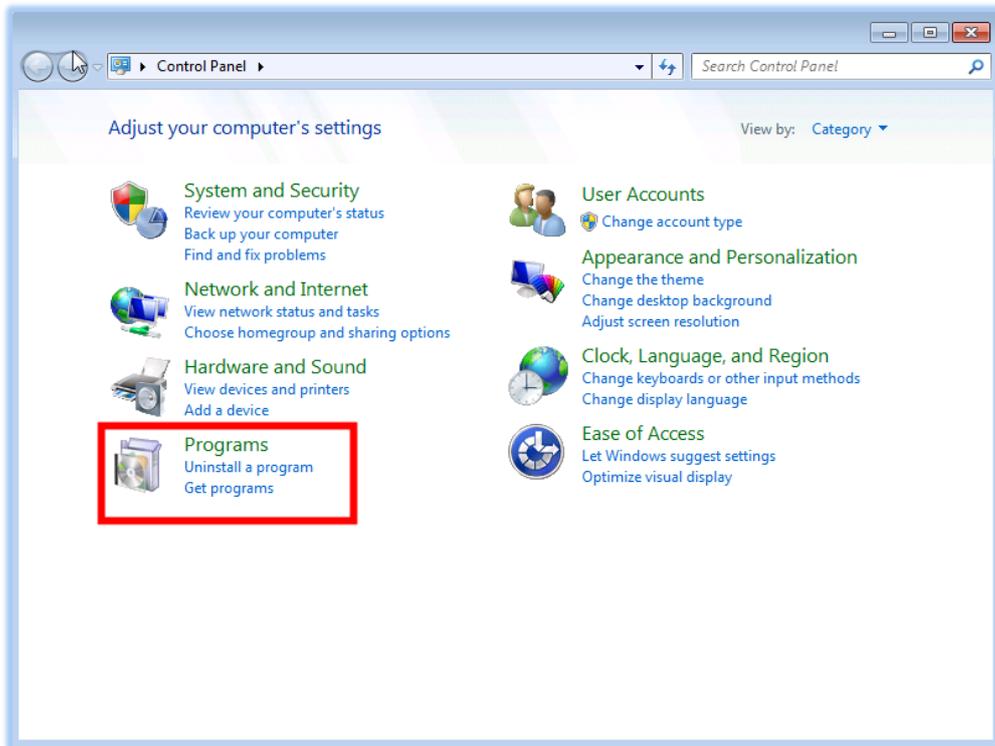
Start > Run > „regedit“ and browse to “HKEY_LOCAL_MACHINE\SOFTWARE\PTM EDV-Systeme\” and choose the configured profile (you can see the profile used in the HKLM\SOFTWARE\PTM EDV Systeme\DocumentsCorePackclient2011\ActiveProfile setting)

The regarding entry is called „**CrmUseIntegratedSecurity**“. Change the value to „**true**“

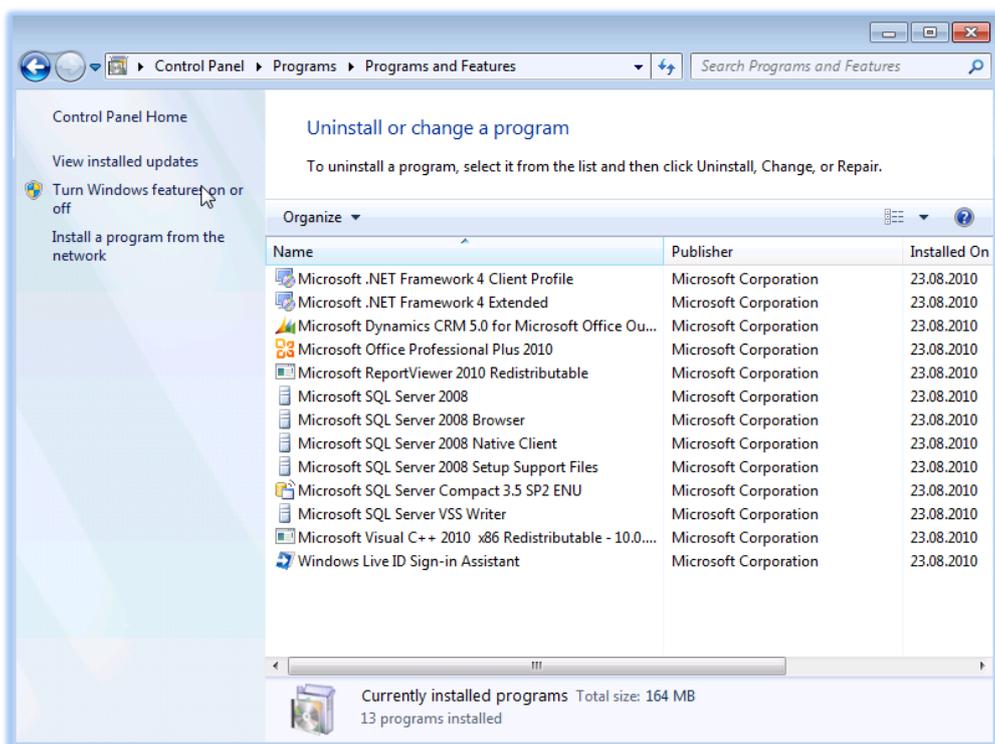


7 Uninstall Client Component

To uninstall DocumentsCorePack Server for MS CRM 2011 select Programs in Control Panel.



Search for DocumentsCorePack Client CRM 2011 in "Uninstall or change a program" to uninstall DocumentsCorePack Client. Follow the instructions to uninstall DocumentsCorePack Client.

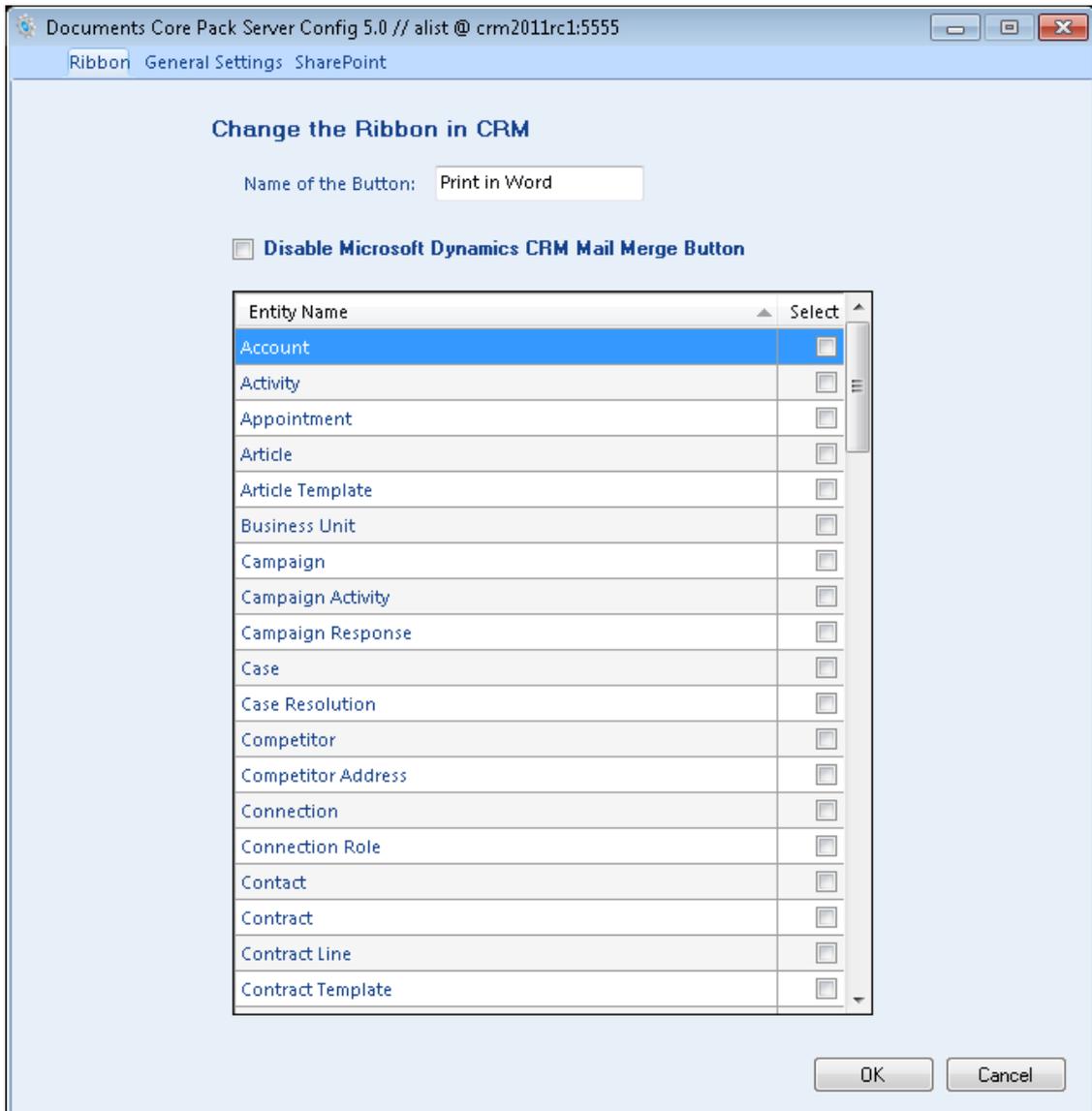


8 Configuration

The DocumentsCorePack Server for MS CRM 2011 Configuration allows you to specify DocumentsCorePack-Settings. E.g.: configure on which entities you want to see the Print in Word Button

After Starting the DocumentsCorePack Server Configuration you'll see following window.

8.1 Ribbon



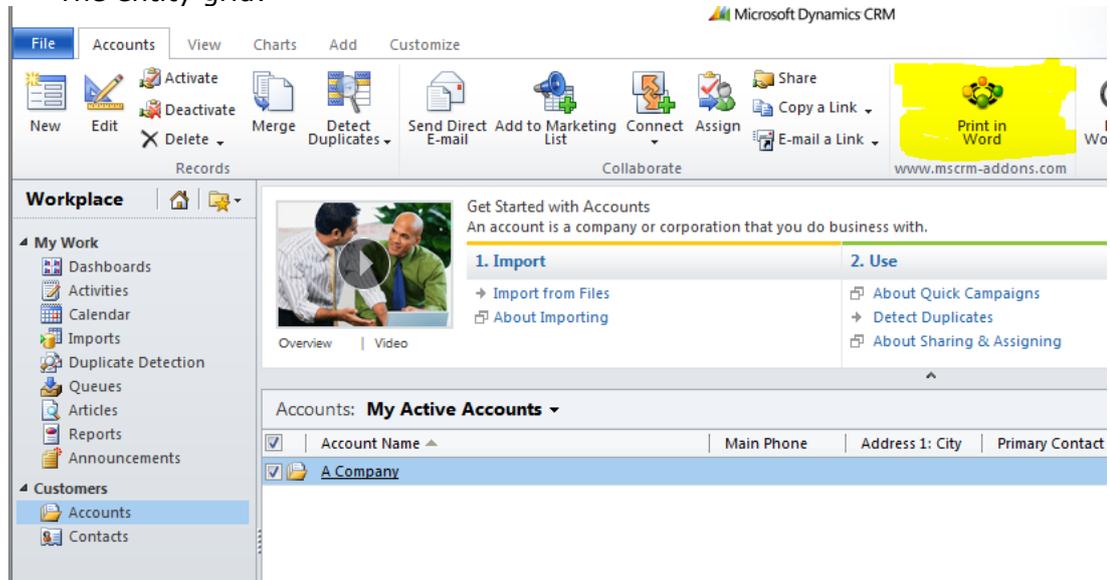
Here you could configure the entities where you want to see the Print In Word Button.

You could also specify the text of the button.

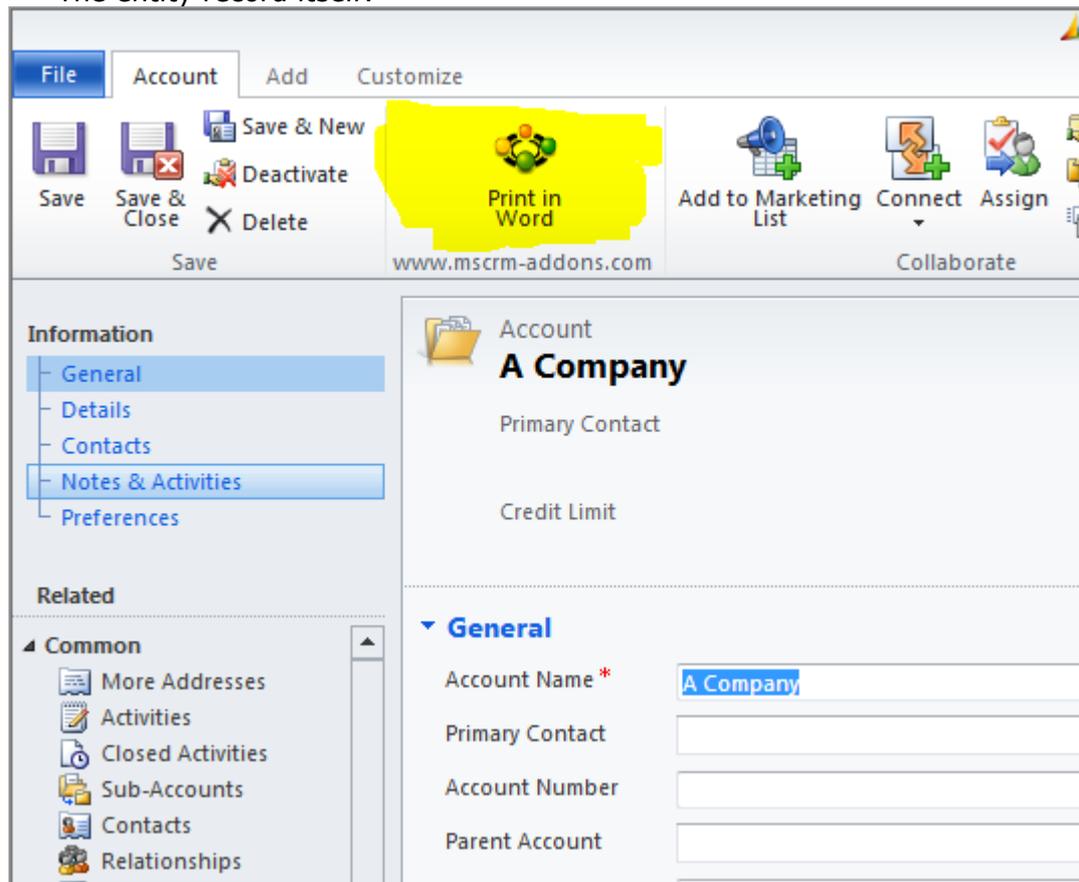
And you can choose to disable the CRM Integrated Mail Merge functionality: This means, that the permission to use the CRM Integrated Mail Merge is removed from every security role. Please note that not every security role, e.g. System Administrator, could be modified so users with these roles could still use the CRM Integrated Mail Merge.

After you applied the Settings, you'll see the Print in Word Button on the selected entities on:

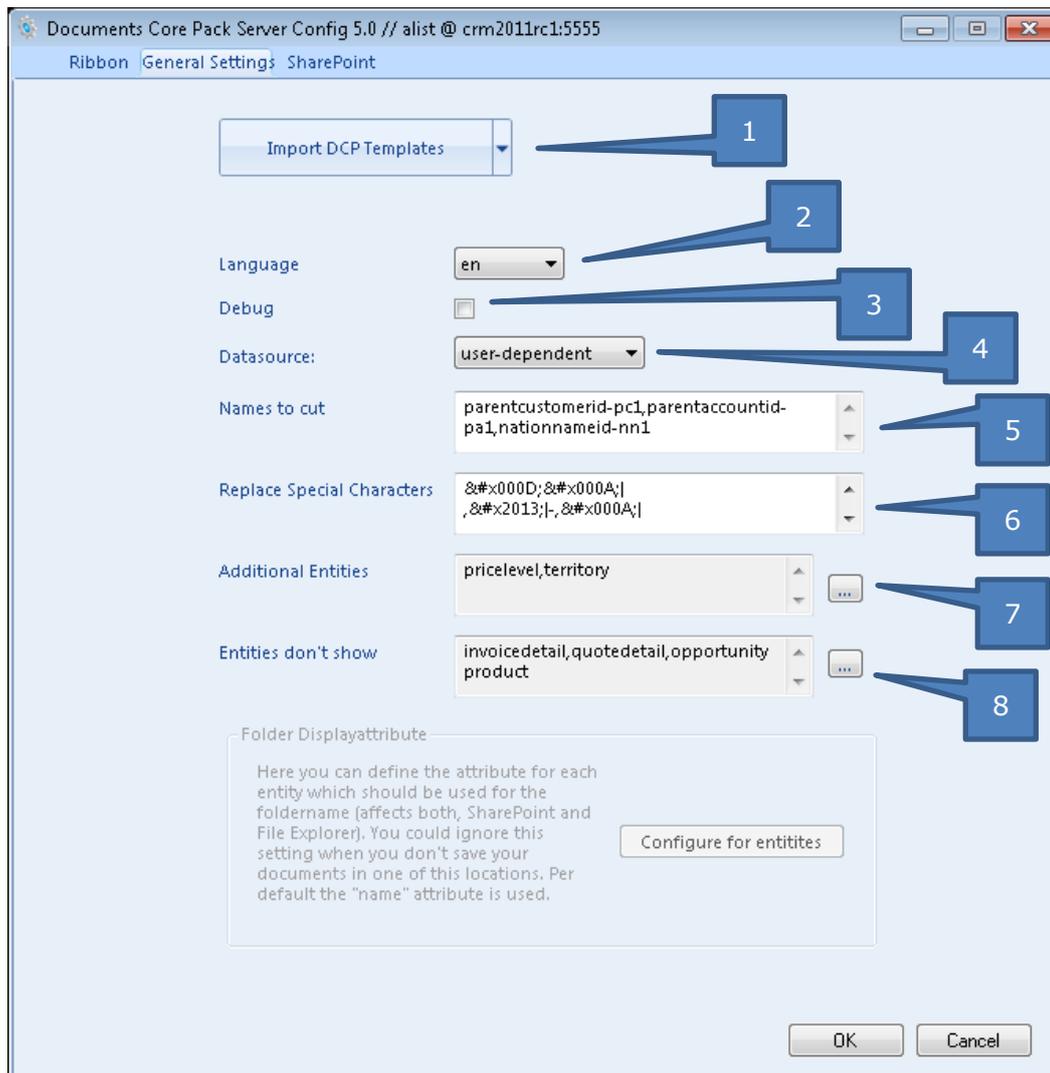
- The entity grid:



- The entity record itself:



8.2 General Settings



1. Import Templates

Please Refer to chapter [10.2](#)

2. Language

You can choose the language in the dropdown-box. Languages are listed in language code (en for English, de for German)
To add another language please see chapter [10](#)

3. Debug

Leave unchecked. This option is used by our Support to simplify bug fixing.

4. Data Source

Here you can select the type of data source. This contains cached information from the CRM, which can be used with DocumentsCorePack Client.

5. Names to Cut

For detailed information see chapter [11](#)

6. Replace Special Characters

Treated special exceptions or certain Coding problems with CRM.

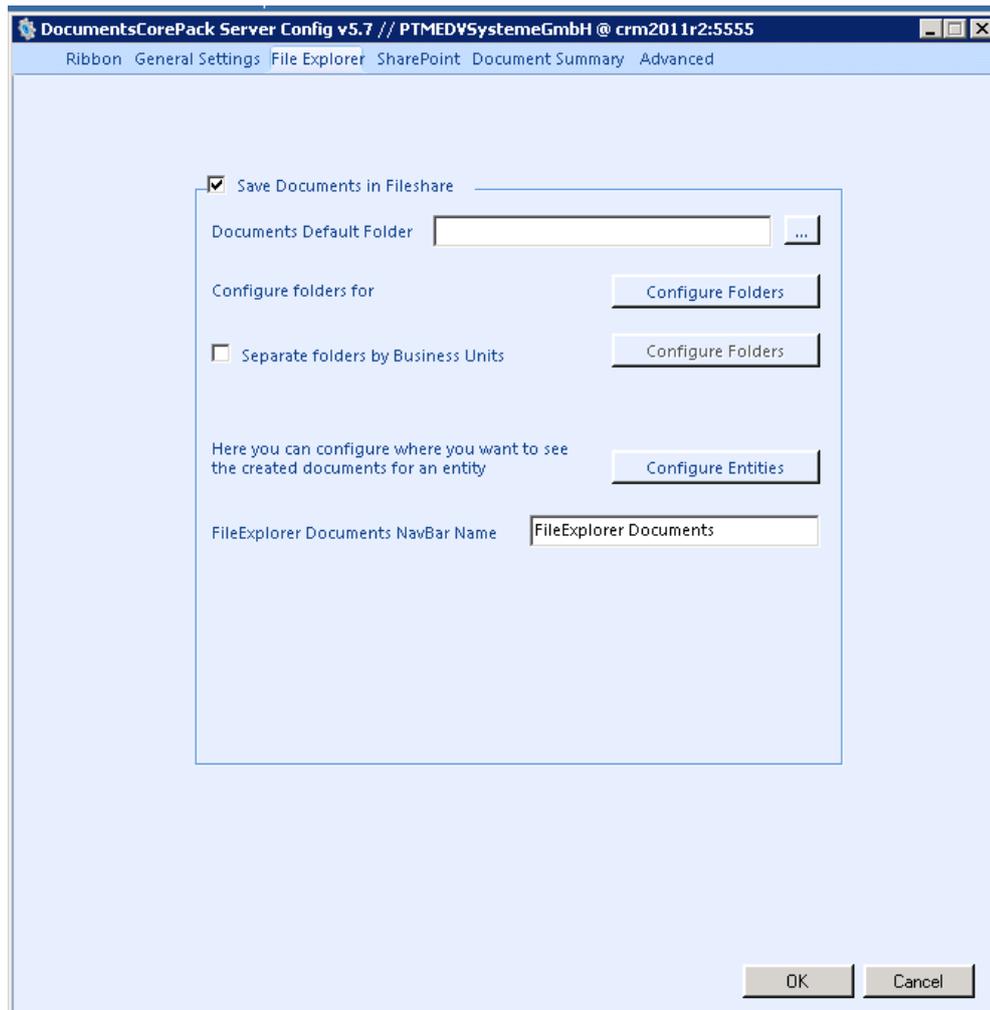
7. *Additional Entities*

Documents Core Pack only shows customizable entities by default. If you want to use other entities for Documents Core Pack you have to define them in here.

8. *Entities don't show*

Entities that are registered here, will be hidden and are not useable/visible with DocumentsCorePack.

8.3 File Explorer



Here you could enable the File Explorer Integration. Documents generated through DocumentsCorePack Client will be saved on the specified file share.

1) **Save Documents in fileshare**

Check here to activate.

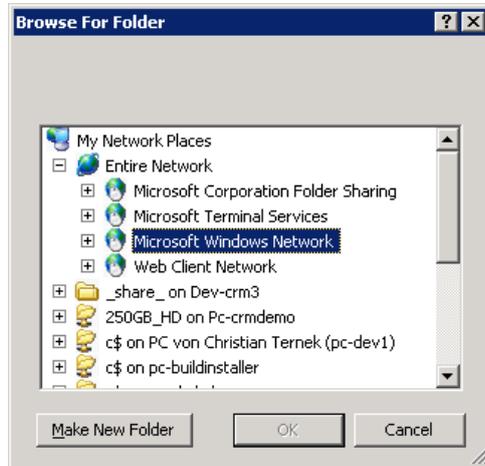
Notice: It's not possible to use both, SharePoint / File Explorer.

When activating File Explorer, SharePoint will be deactivated automatically.

2) **Documents Default Folder**

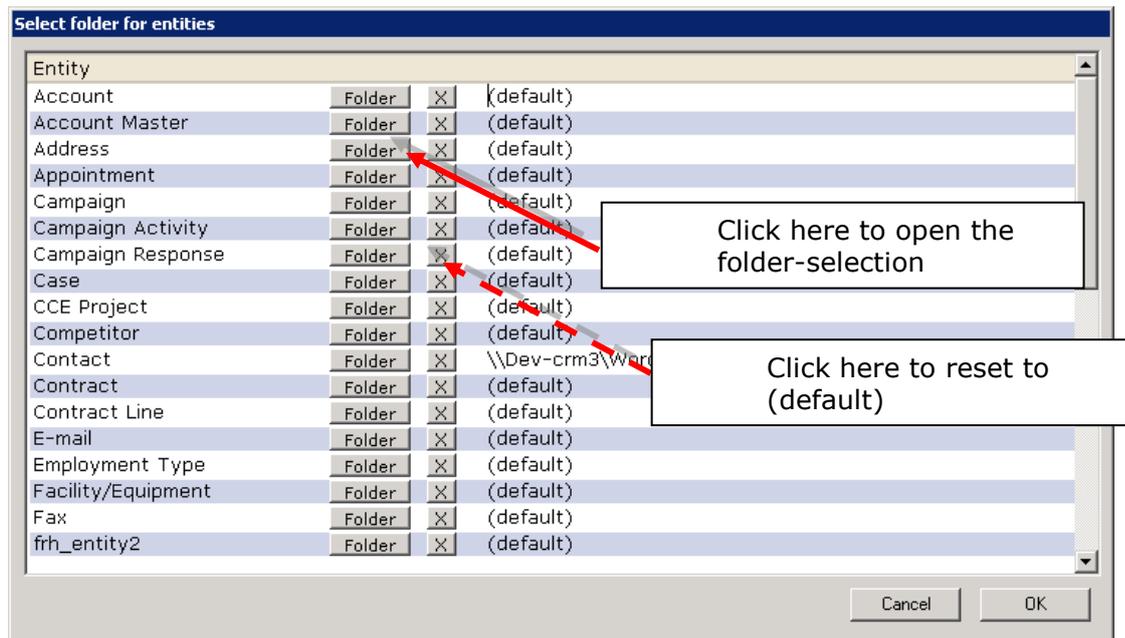
Specifies the file-share to which the created documents should be saved to.

You can choose/create a folder with a click on [...]

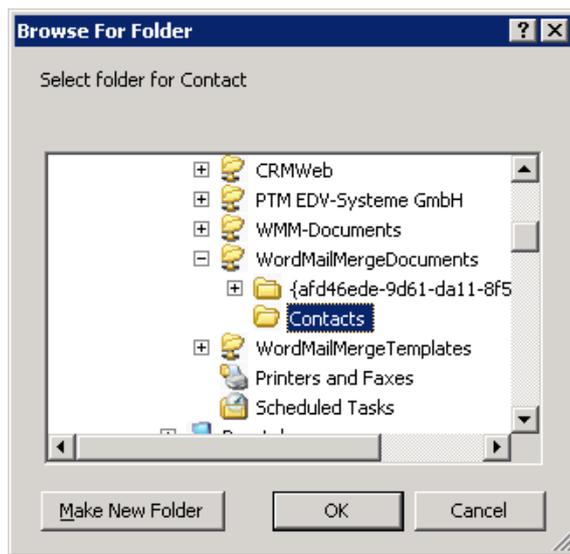


3) **Configure Folder for entities**

Here you can specify a specific folder for each entity.



Click on [Folder] to open the Selection (e.g contact)

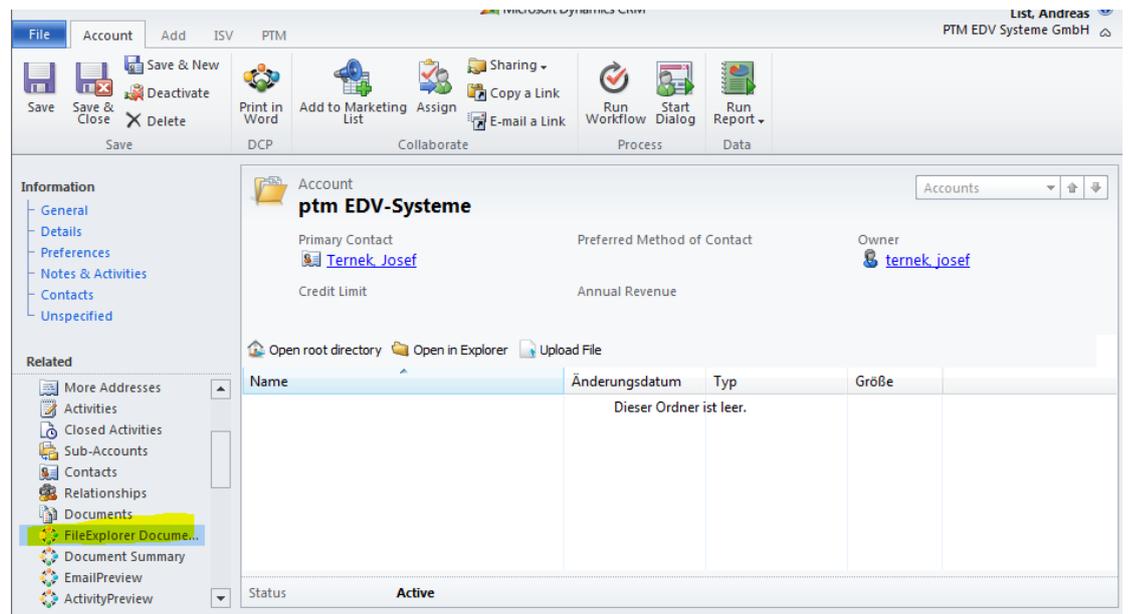


All documents for entity account will be saved to this folder afterwards.

If you set this option to (default) documents will be saved to the root of the file share.

4) **Configure Entities**

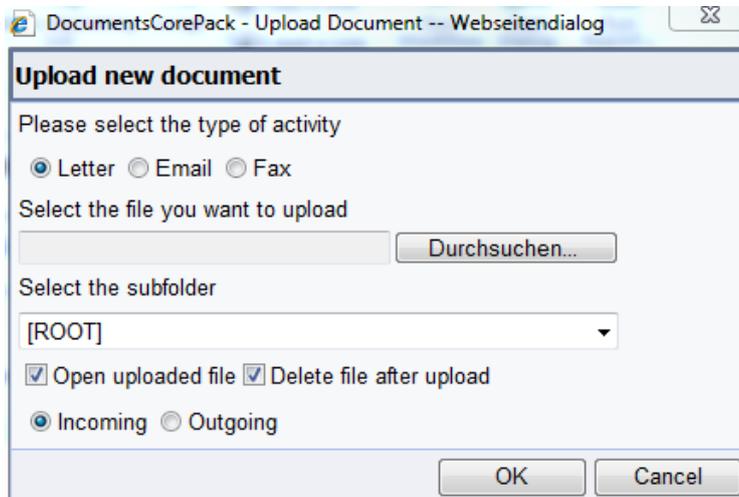
Here you could define on which entities you want to see the "File Explorer Documents". This will be the default name of the navigation item within CRM. You could change this name with the "File Explorer Documents NavBar Name" Setting.



You have a toolbar with three simple options available

1. "Open root directory": If you have a subfolder structure within this folder you could navigate through the folders. And with a click on this button, the root folder will be opened again

2. "Open in Explorer": This will open the directory direct in a Windows Explorer Window
3. "Upload File": You could choose a file and upload it to this folder. There will automatically an activity be created.



DocumentsCorePack - Upload Document -- Webseitendialog

Upload new document

Please select the type of activity

Letter Email Fax

Select the file you want to upload

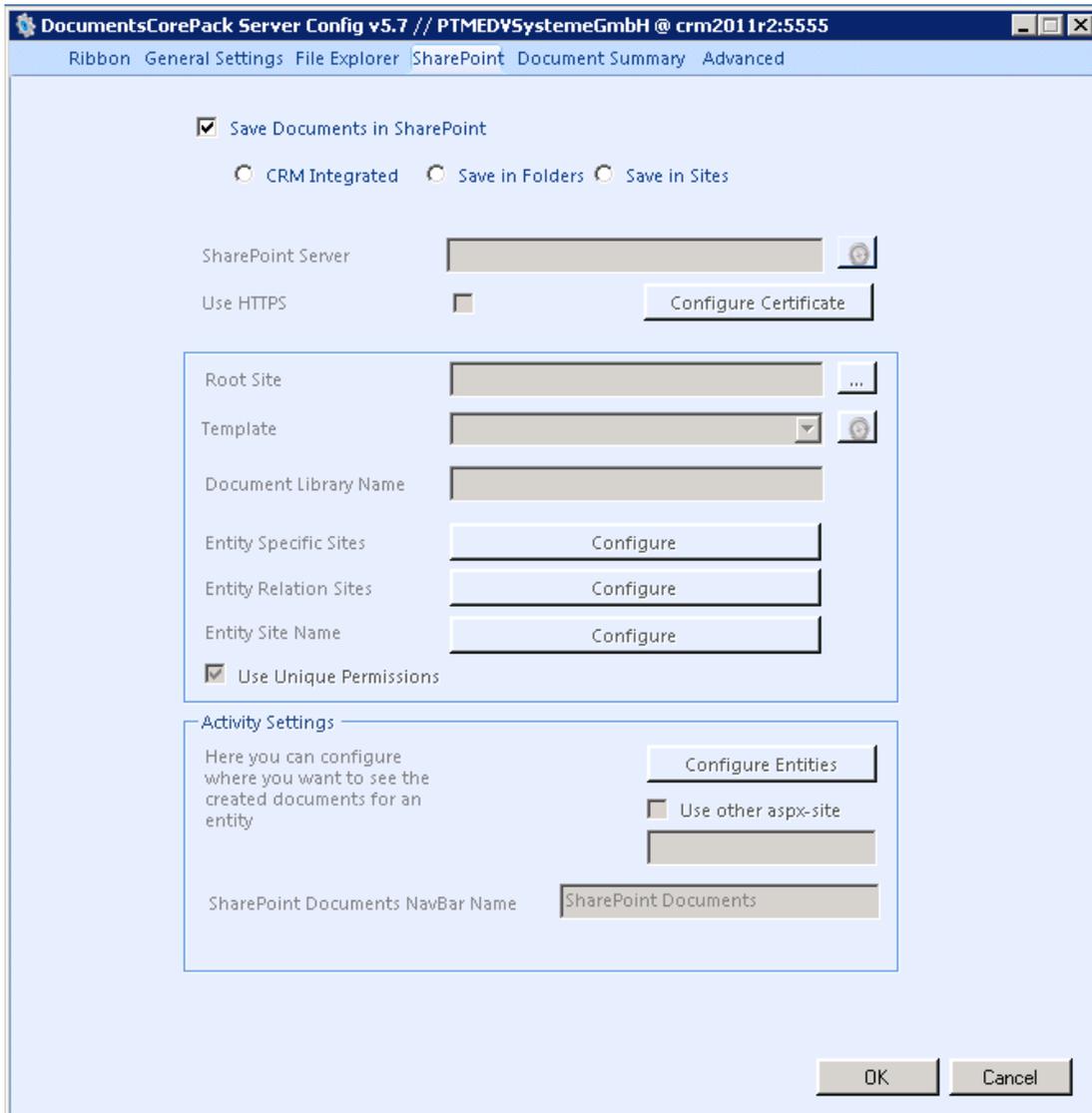
Select the subfolder

[ROOT]

Open uploaded file Delete file after upload

Incoming Outgoing

8.4 SharePoint



DocumentsCorePack Server Config v5.7 // PTMEDVSystemeGmbH @ crm2011r2:5555

Ribbon General Settings File Explorer SharePoint Document Summary Advanced

Save Documents in SharePoint

CRM Integrated Save in Folders Save in Sites

SharePoint Server

Use HTTPS

Root Site

Template

Document Library Name

Entity Specific Sites

Entity Relation Sites

Entity Site Name

Use Unique Permissions

Activity Settings

Here you can configure where you want to see the created documents for an entity

Use other aspx-site

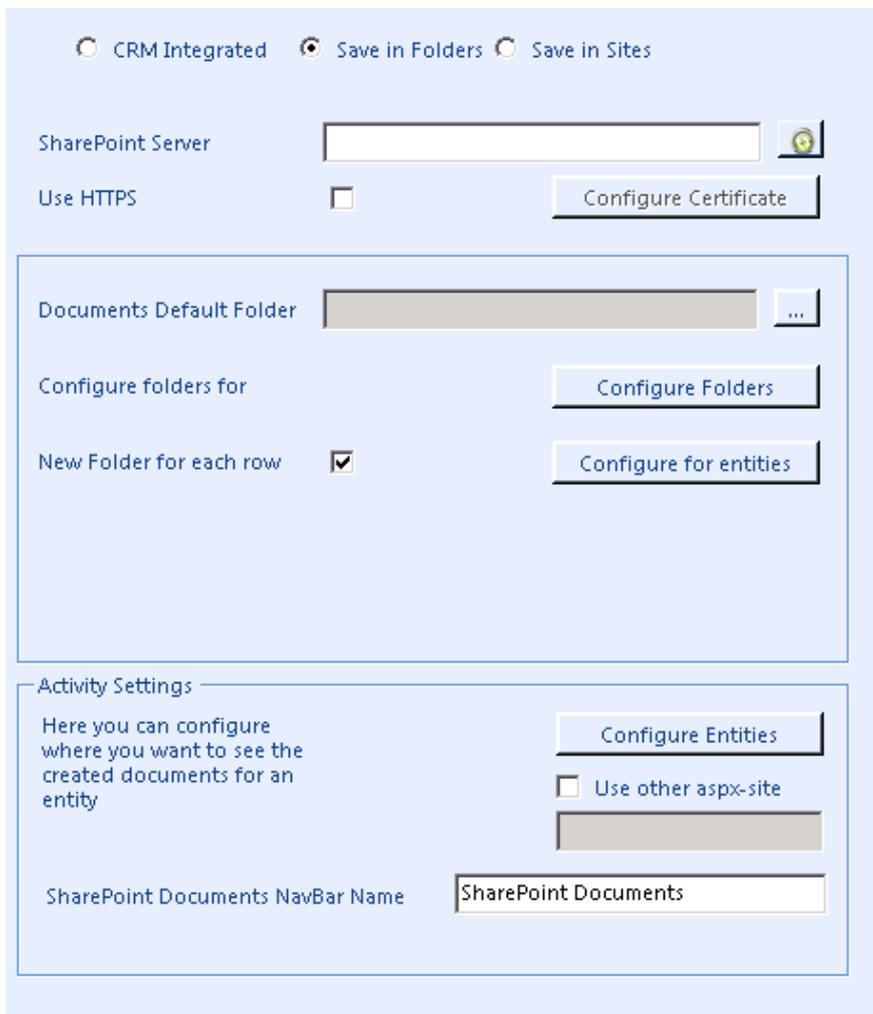
SharePoint Documents NavBar Name

You could decide between three SharePoint Integration Options:

1. CRM Integrated: You have to configure the SharePoint Integration within CRM to use this integration. When enabled, the documents generated through DocumentsCorePack Client will be saved in the CRM specified SharePoint location for each record.
2. Save in folders: A new **folder** will be created for each record
3. Save in Sites: A new **site** will be created for each record

8.4.1 Save documents to SharePoint settings - Folders

Here it's possible to define how the documents should be saved to the SharePoint Folders. You have to select "Save in Folders".



The screenshot shows a configuration window with the following elements:

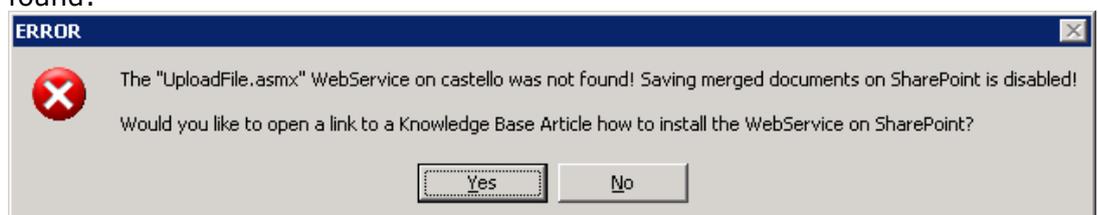
- Three radio buttons at the top: "CRM Integrated" (unselected), "Save in Folders" (selected), and "Save in Sites" (unselected).
- A text box for "SharePoint Server" with a refresh button to its right.
- A checkbox for "Use HTTPS" (unchecked) and a "Configure Certificate" button.
- A text box for "Documents Default Folder" with a browse button ("...") to its right.
- A "Configure folders for" section with a "Configure Folders" button.
- A checkbox for "New Folder for each row" (checked) and a "Configure for entities" button.
- An "Activity Settings" section containing:
 - Text: "Here you can configure where you want to see the created documents for an entity".
 - A "Configure Entities" button.
 - A checkbox for "Use other aspx-site" (unchecked) and an empty text box below it.
 - A text box for "SharePoint Documents NavBar Name" containing the text "SharePoint Documents".

1) **SharePoint Server**

Please enter the URL to the SharePoint Server. With a click on the Refresh button you could check if the WebService is installed.

Notice: The Documents Core Pack – services have to be installed on the SharePoint to activate.

You'll get following notification if the necessary services could not be found:



In this case you'll have to install the DCP Sharepoint services on the SharePoint

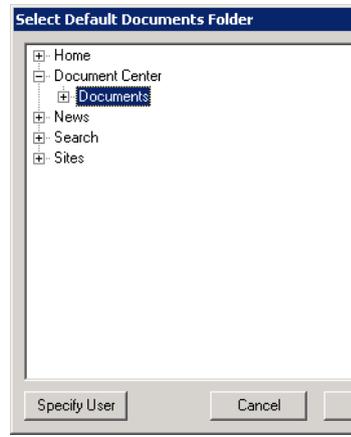
-> see KB-article:

<http://support.mscrm-addons.com/default.aspx?KB=10272>

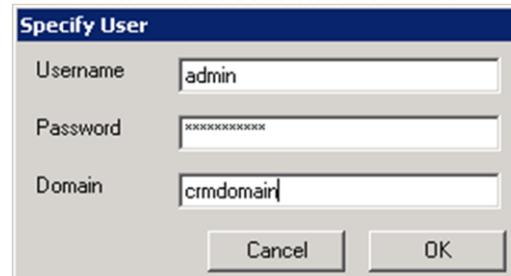
2) Documents Default Folder

Specifies the default folder for documents saved with Documents Core Pack

You can choose the folder with a click on [...]

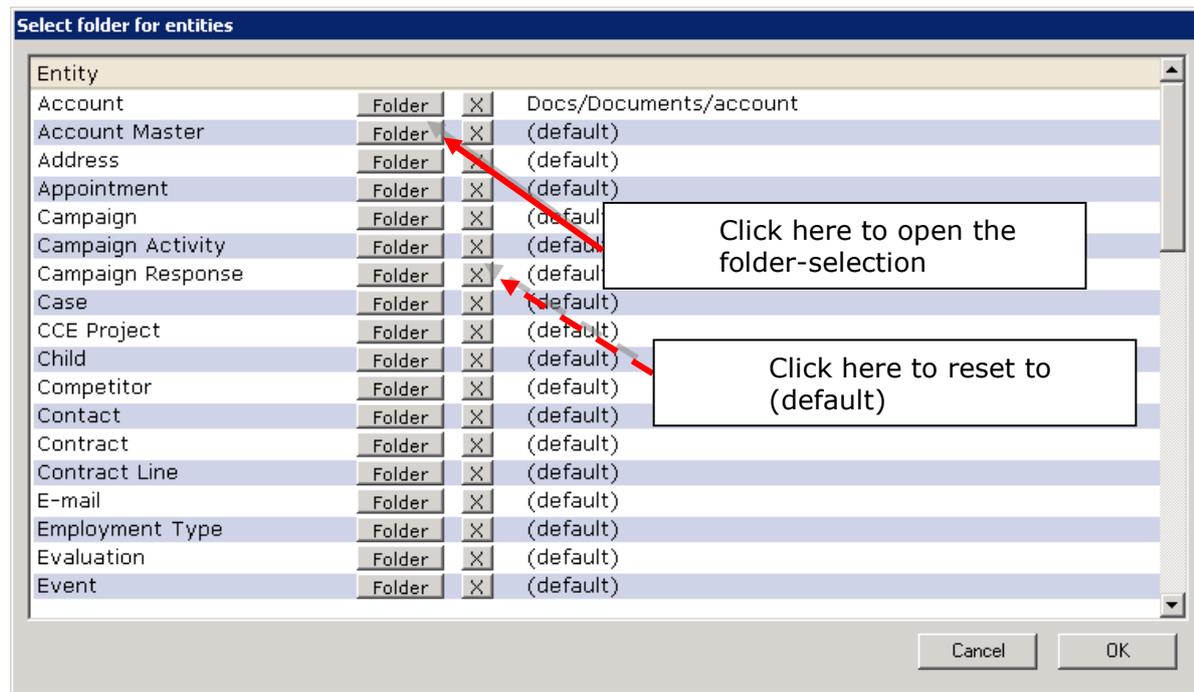


May you don't have permissions to read the existing folders, in this case you can change the user with a click on [Specify User]. **You have to specify a user which is Site Collection Administrator.**

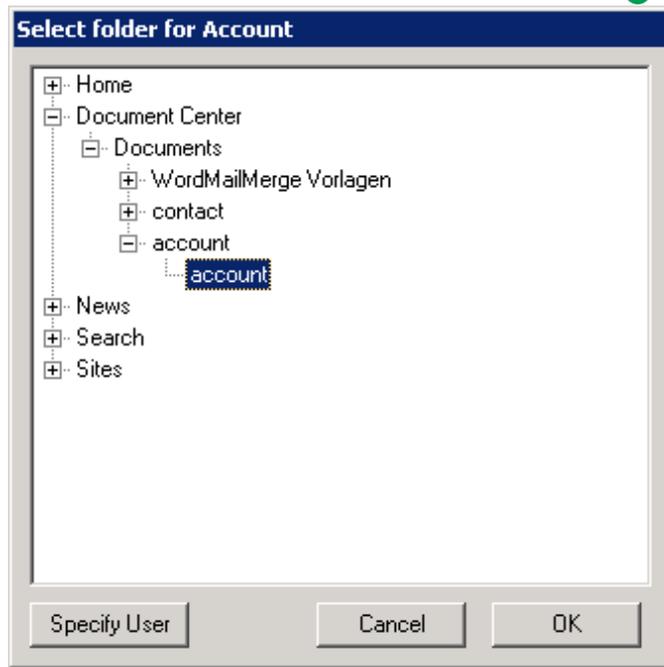


3) Configure Folder for entities

Here you can specify a specific folder for each entity.



Click on [Folder] to open the Selection (e.g account)



All documents for entity account will be saved to this folder afterwards.

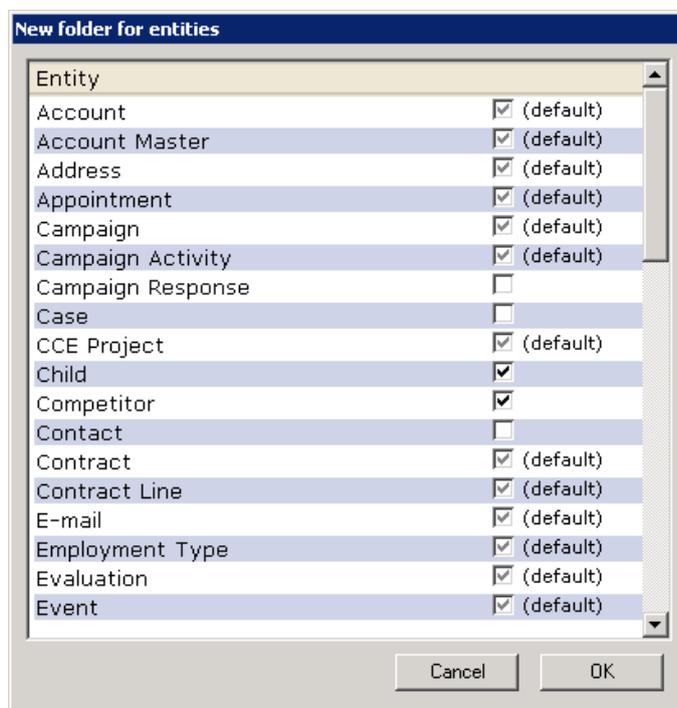
Set this option to (default) to use the Documents default folder

4) **New Folder for each row**

Here you can choose if you want to have an extra folder for each record of an entity (e.g. account, contact,...)

you can set this option by default with the checkbox.

To specify this option for each entity, click on [Configure for entities]



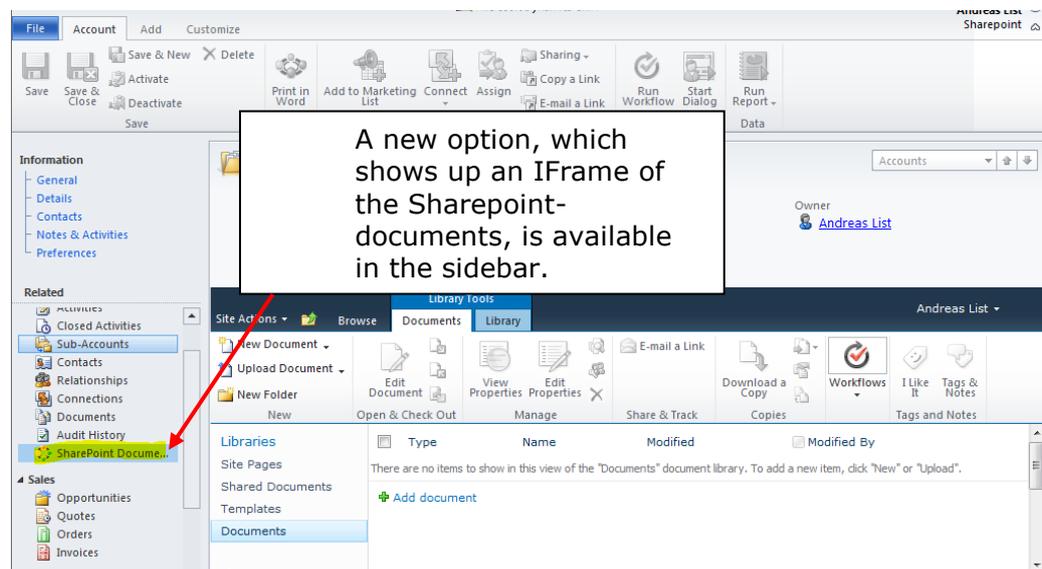
Options:

- Checked: a new folder will be created for each record
- Unchecked: Documents saved for this entity will be saved to the folder specified in No: 2 and 3 (see above)
- (default): overtakes the state of the "New Folder for each row"-Checkbox.

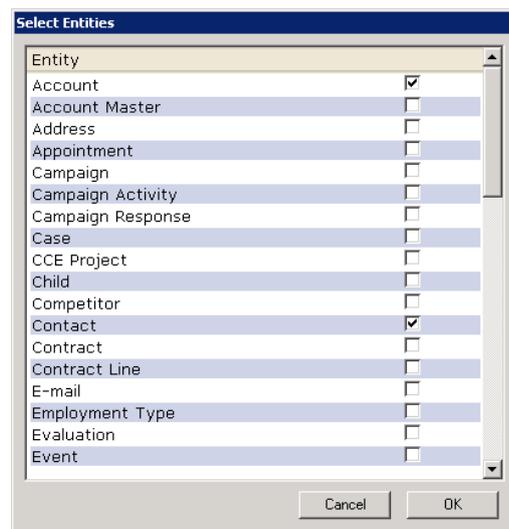
5) **Visualization options**

Here it's possible to choose where you want to see the created/saved documents

The documents will be shown within the entity details of the entities.
A new menu option will appear in the sidebar.



you can specify the entities where this option should appear with a click on [Configure for entities]



By default, the view "AllItems.aspx" is used to view your Sharepoint documents. Use the "Use other aspx-site" setting to change the default view.

Activity Settings

Here you can configure where you want to see the created documents for an entity

Configure Entities

Use other aspx-site

SharePoint Documents NavBar Name: SharePoint Documents

You could also specify the name of the Navigation Bar within CRM with the "SharePoint Documents NavBar Name" Setting.

8.4.2 Save documents to SharePoint settings – Sites

Here it's possible to define how the documents should be saved to the SharePoint Sites. You have to select "Save in Sites"

Save Documents in SharePoint

CRM Integrated Save in Folders Save in Sites

SharePoint Server: 

Use HTTPS:

Root Site: 

Template: 

Document Library Name:

Entity Specific Sites:

Entity Relation Sites:

Entity Site Name:

Use Unique Permissions

Activity Settings

Here you can configure where you want to see the created documents for an entity

Configure Entities

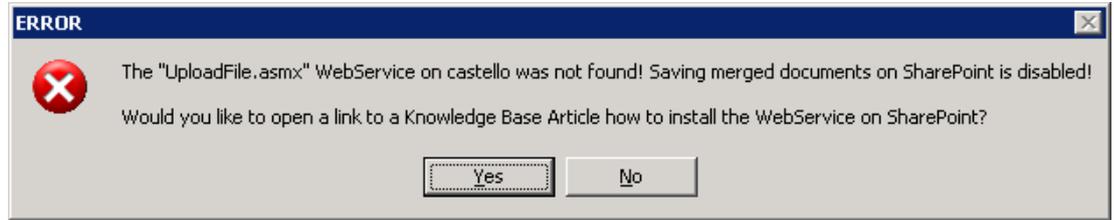
Use other aspx-site

SharePoint Documents NavBar Name: SharePoint Documents

1) **SharePoint Server**

Please enter the URL to the SharePoint Server. With a click on the Refresh

button you could check if the WebService is installed.
 Notice: The Documents Core Pack – services have to be installed on the Sharepoint to activate.
 You'll get following notification if the necessary services could not be found:

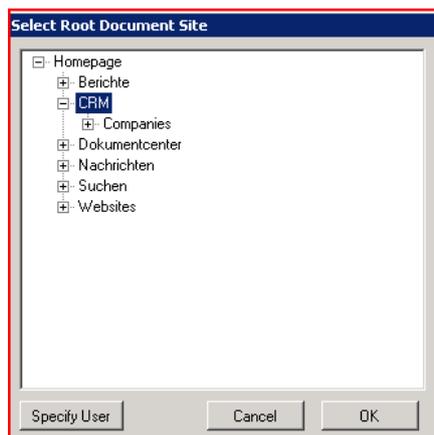


In this case you'll have to install the DCP Sharepoint services on the SharePoint
 -> see KB-article:
<http://support.mscrm-addons.com/default.aspx?KB=10272>

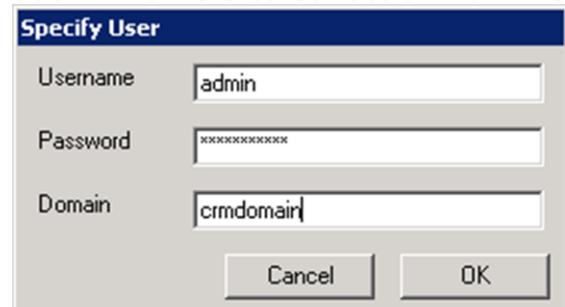
5) **Root Site**

Specifies the default site for documents saved with Documents Core Pack

You can choose the site with a click on [...]



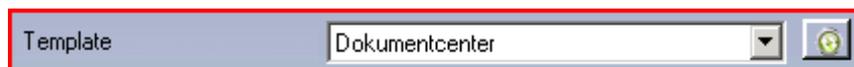
Should you not have the permissions to read the existing sites, you can change the user with a click on [Specify User]. **You have to specify a user which is Site Collection Administrator**



You can select any sub site or also the SharePoint root.

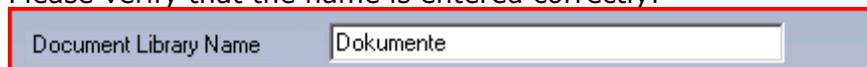
6) **SharePoint Template**

First time round you will have to hit the refresh button to read all the SharePoint site templates. Then select a SharePoint template which must include **at least one** Document Library.



7) **Document Library Name**

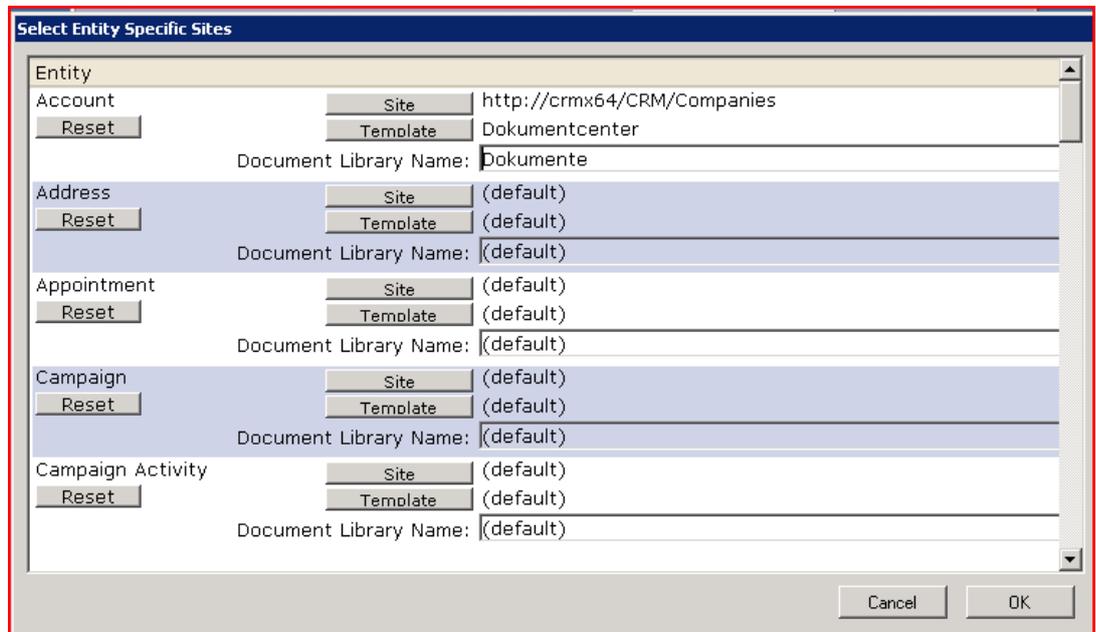
You have to enter the name of a Document Library which exists in the SharePoint template. You selected the template in the previous step! Please verify that the name is entered correctly!



8) Entity Specific Sites

Here you can configure for each entity a specific site where the sub sites for each record will be generated.

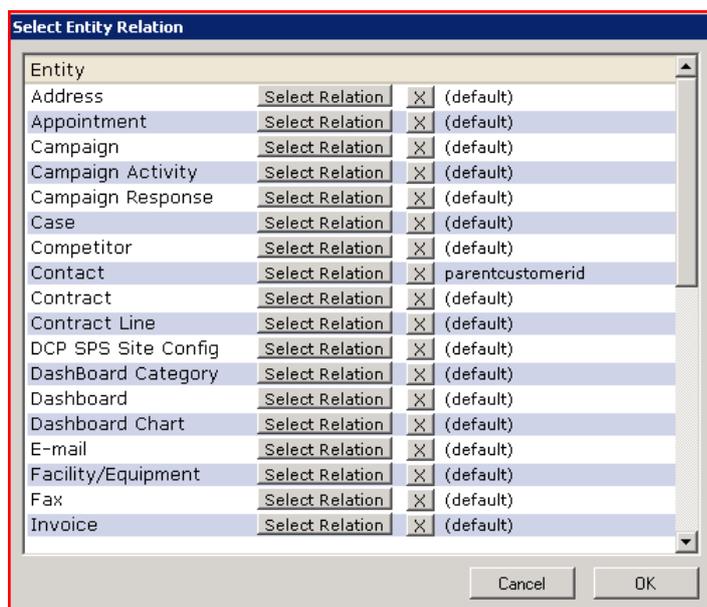
You must select a site on SharePoint and a SharePoint Template which must include **at least one** Document Library. The name of the Document Library must exist in the template you have selected.



Entity	Site	Template	Document Library Name
Account	http://crm64/CRM/Companies	Dokumentcenter	Dokumente
Address	(default)	(default)	(default)
Appointment	(default)	(default)	(default)
Campaign	(default)	(default)	(default)
Campaign Activity	(default)	(default)	(default)

9) Entity Relation Sites

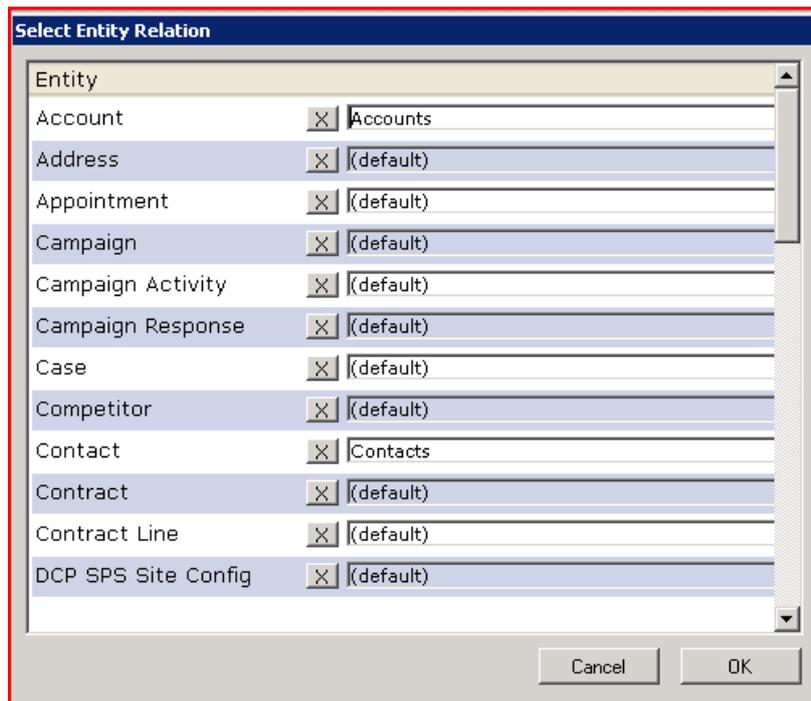
You can select a relationship to another entity in which the sites will be generated as sub sites. E.g. If all contact sites should be created under the parent customer (account), you can select the relation for a contact to the account which is parentcustomerid. Every contact site will be created under the related account site.



Entity	Select Relation	Value
Address	X	(default)
Appointment	X	(default)
Campaign	X	(default)
Campaign Activity	X	(default)
Campaign Response	X	(default)
Case	X	(default)
Competitor	X	(default)
Contact	X	parentcustomerid
Contract	X	(default)
Contract Line	X	(default)
DCP SPS Site Config	X	(default)
DashBoard Category	X	(default)
Dashboard	X	(default)
Dashboard Chart	X	(default)
E-mail	X	(default)
Facility/Equipment	X	(default)
Fax	X	(default)
Invoice	X	(default)

10) Entity Site Name

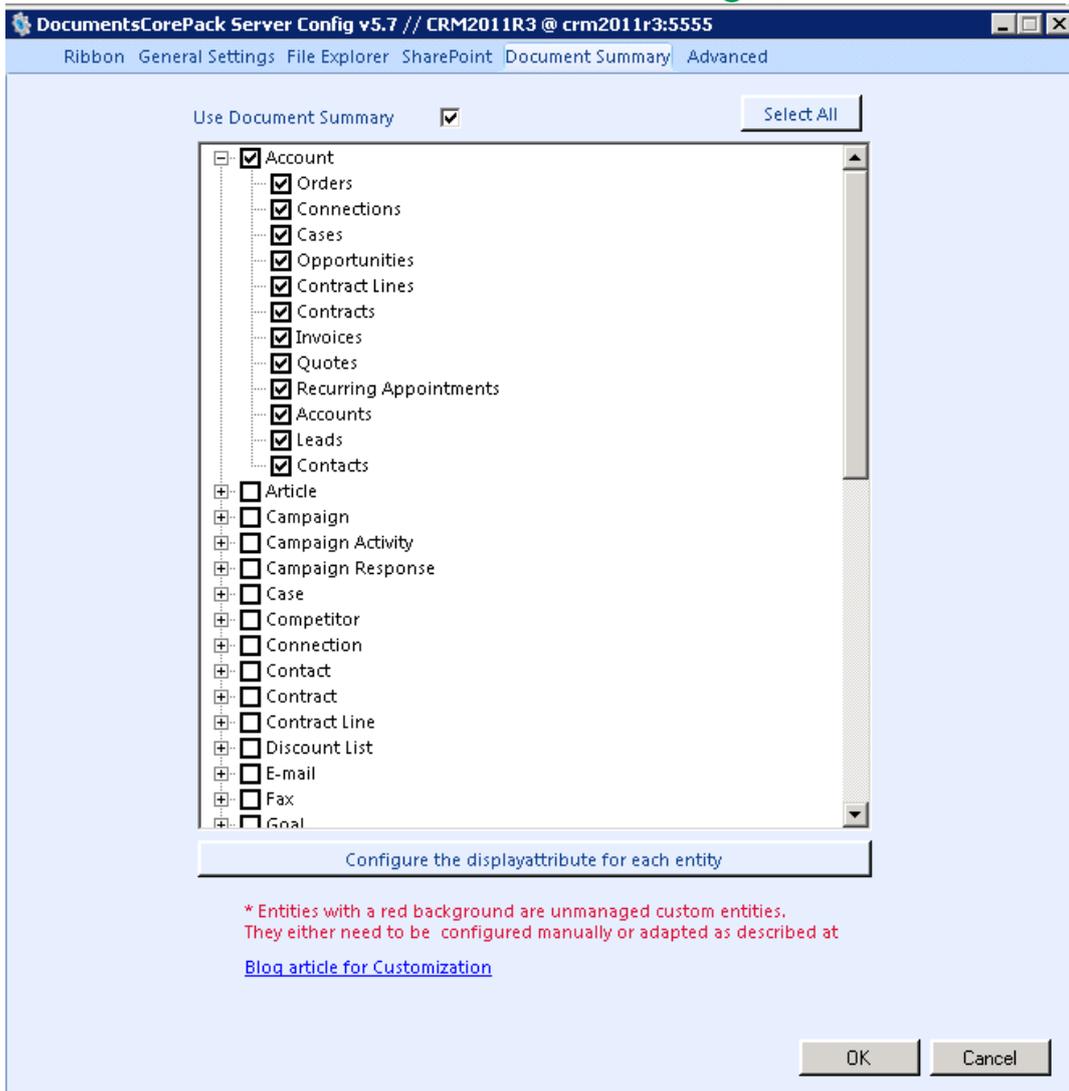
For each entity you could select a "display" name. This name will be used for the site name of each entity. E.g. when you've configured in the relation settings that the contacts will be saved under the related account, a sub site under the account site will be generated with the schema name. In this example "contact". The contact sites will be created under this site. If you don't like this name, you could change in this settings, that this name should be e.g. "Contacts"



8.5 Document Summary

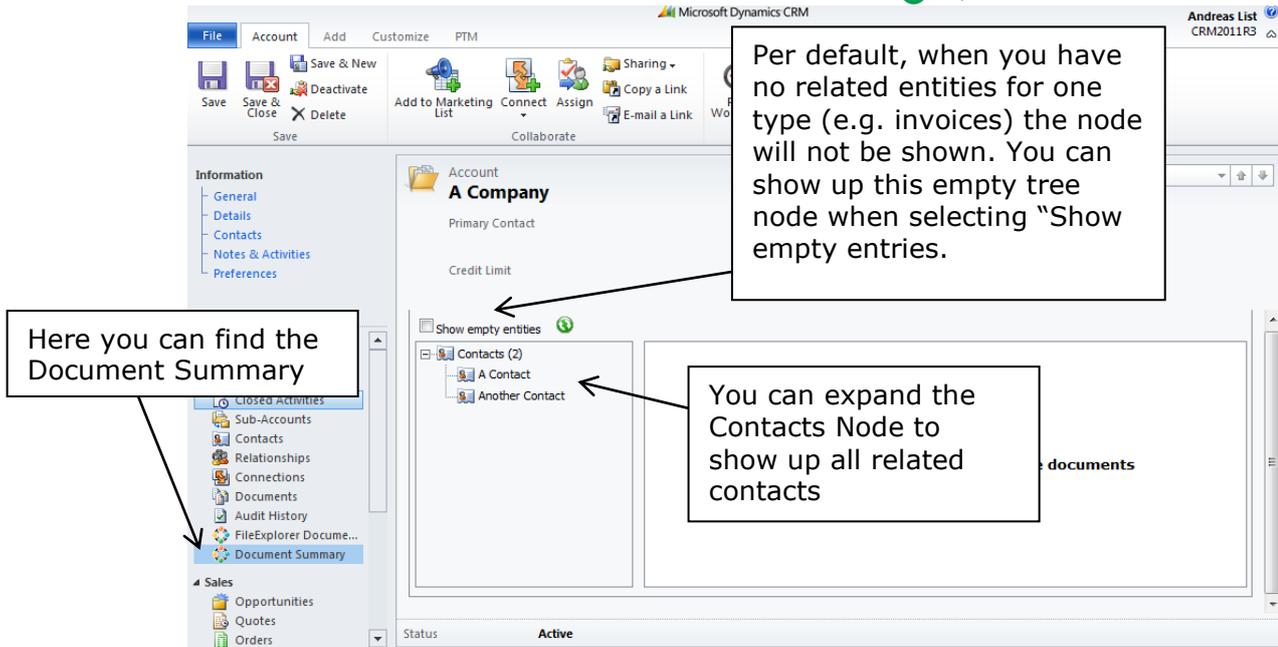
With the Document Summary you have the possibility to view the File Explorer or SharePoint Documents from related entities. So you have to configure SharePoint or File Explorer before activating the Document Summary.

E.g. you have an account with 5 related contacts. Instead of open up every contact and open "File Explorer Documents" or "SharePoint Documents" of each one, you can use the Document Summary to view the documents of the contacts.



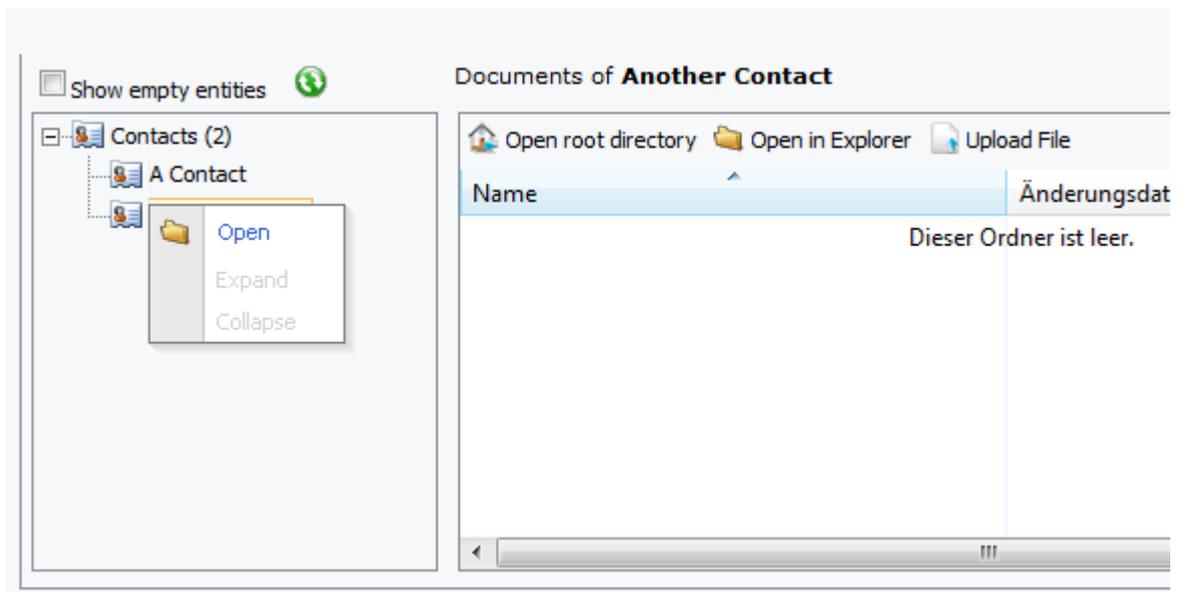
The first level of the tree indicates on which entity you want to see the Document Summary. And the second level of the tree indicates, which related entities you want to see. You could only select 1:n relations.

After activating the Document Summary, you'll see a new navigation item on the entities you selected in the first tree level.



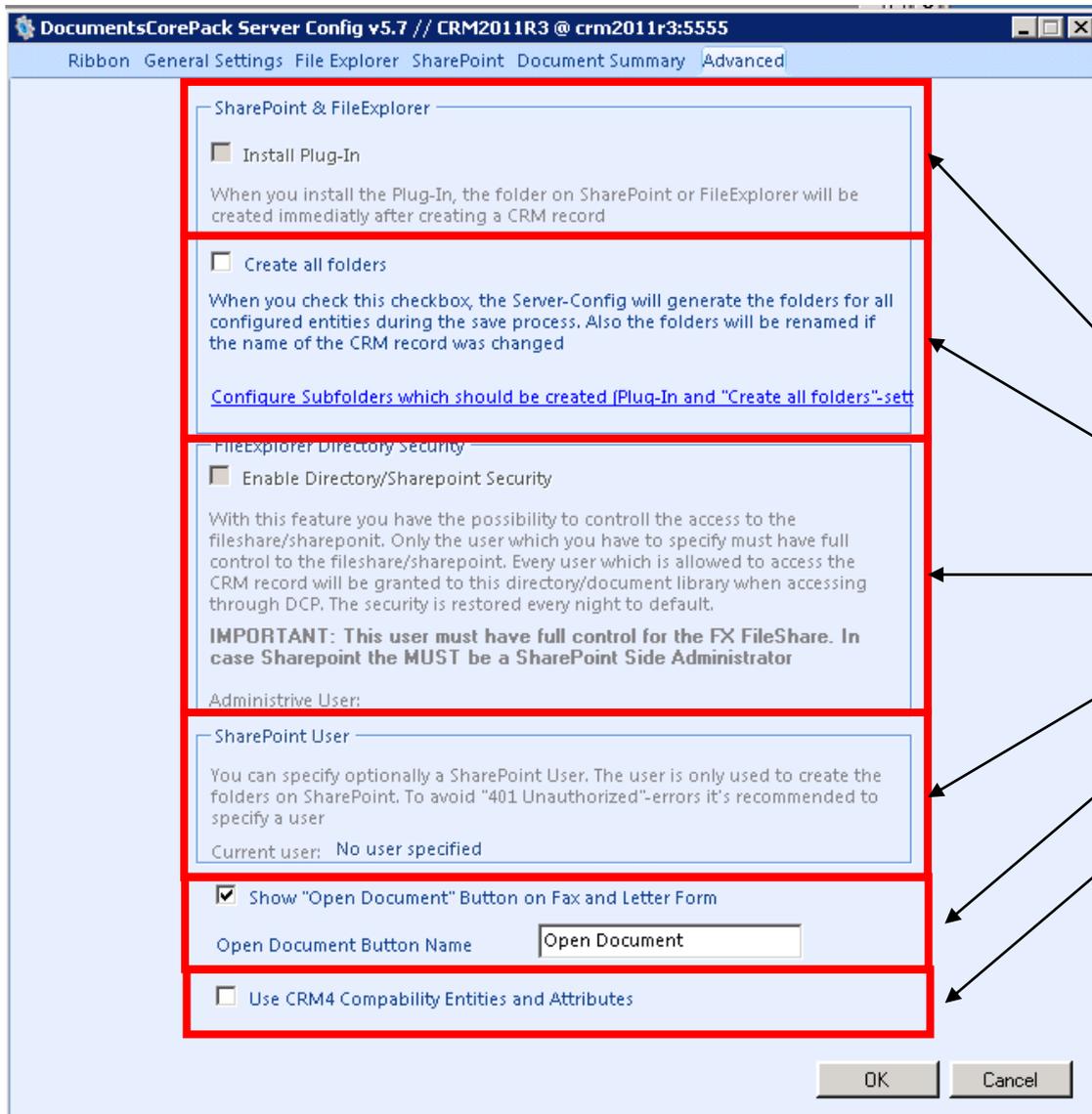
You can click on a contact to see its (File Explorer or SharePoint) documents. It basically shows the same as when opening the contact directly and click on "SharePoint Documents" or "File Explorer Documents".

You have also a right click menu on each node. You can open up the entity or expand/collapse the tree.



The tree is recursive. This means, that you can expand the tree downwards till you don't have any related entities. E.g. open an account, expand the contacts, expand the invoices of a contact and so on.

8.6 Advanced Settings



- 1) **Install Plug-In**
When you install the Plug-In, the folder on SharePoint or File Explorer will be created immediatly after creating a CRM record.
NOTE: This feature is currently not available!
- 2) **Create all folders**
When you check this checkbox, the Server-Config will generate the folders for all configured entities during the save process. Also the folders will be renamed if the name of the CRM record was changed.
- 3) **Enable Directory Security**
With this feature you have the possibility to control the access to the file share. Only the user which you have to specify must have full control to the file share. Every user which is allowed to access the CRM record will be granted to this directory when accessing through DCP. The security is restored every night to default.
NOTE: This feature is currently not available!

- 4) **SharePoint User**
You can specify optionally a SharePoint User. The user is only used to create the folders on SharePoint. To avoid "401 Unauthorized" –errors it's recommended to specify a user.
- 5) **Show Open Document Button**
When you've configured File Explorer or SharePoint Integration, you could here specify if you want to see a "Open Document" button on the fax and letter activities. With that button you could open the associated document when it was generated through DocumentsCorePack Client. You could also configure the name of the button. When you enable File Explorer or SharePoint, this settings is activated by default.
- 6) **Use CRM 4.0 Compatibility**

The CRM4 Compatibility mode is necessary when you migrated your organization from CRM 4.0 to CRM 2011 **and** you used File Explorer or SharePoint Integration.
For the Fax and Letter activity the document links where saved in an attribute. When the compatibility mode is enabled, the old CRM 4.0 attributes will be used. Otherwise the new DCP 2011 attributes will be used.

9 Documents Core Pack Templates

Documents Core Pack Templates are predefined Word Templates which have some mail merge fields in it. You can define several templates for each MS CRM Entity(e.g. account, contact,..).

e.g. you created a "Account reconnect" Template that should be used to send informations to accounts.

Once created and stored, every MS CRM User can generate a "Account reconnect" Letters based on this template..

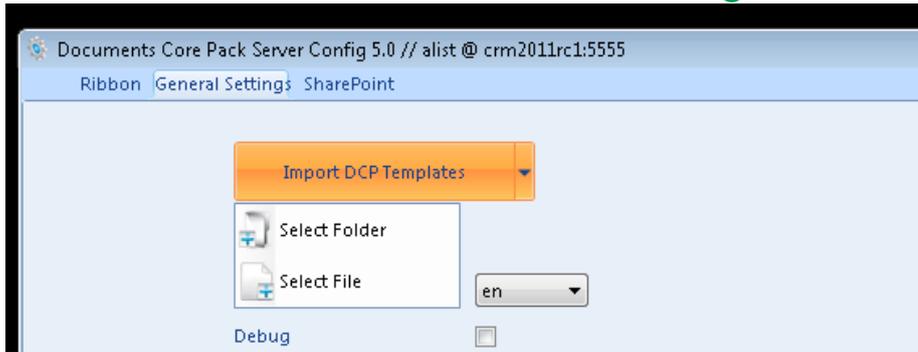
NOTE: Some basic templates like "Account Reconnect", "Gift Certificate" for contacts and "quote" – templates come with the installation of Documents Core Pack.

9.1 How to create Documents Core Pack Templates

Read the "Users Guide" – Document to get more information about the creation of Documents Core Pack Templates.

9.2 Import existing DocumentsCorePack Templates

On the General Tab you have the possibility to import either a folder or a file.



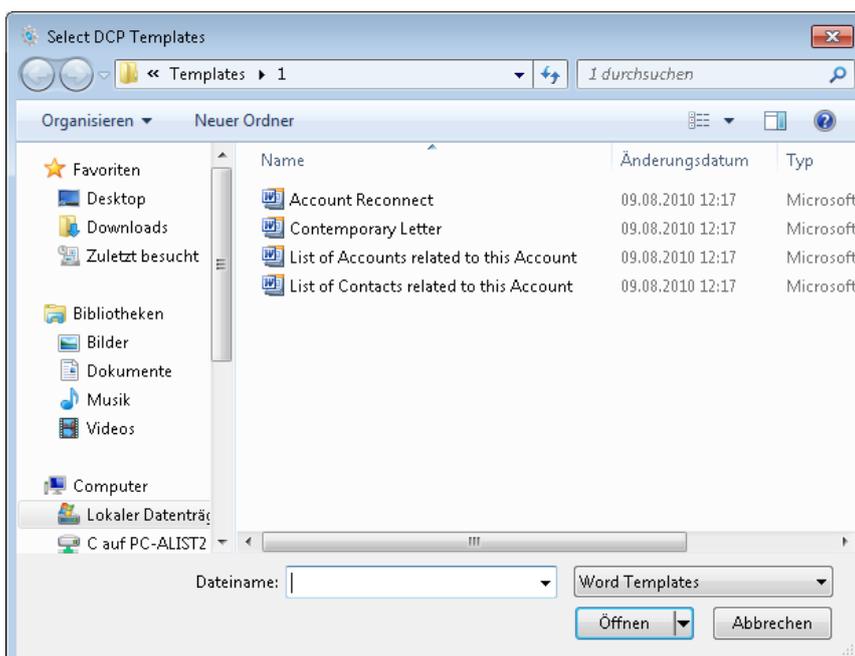
9.2.1 Import a Folder

To import a folder, choose "Select Folder". You'll be prompted with following dialog where you could select the directory with the templates



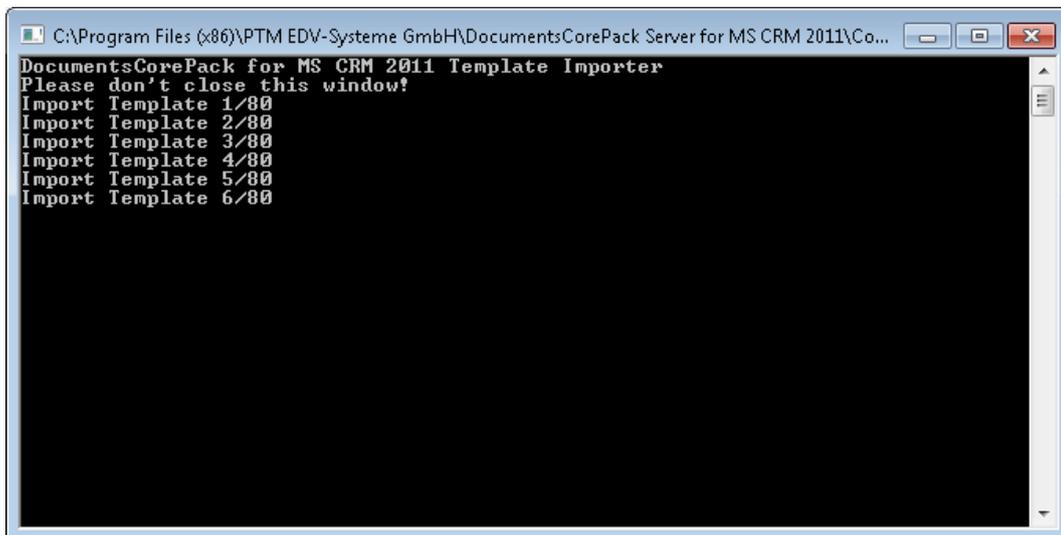
9.2.2 Import a File

To import a file, choose "Select File". You'll be prompted with following dialog where you could select one or more templates to import.



9.2.3 Processing Import

After you selected a folder or a file, you'll see following window. Please don't close this window! It will be closed automatically when the imported succeeded



10 Language Settings for DocumentsCorePack

The UI of Documents Core Pack can be modified to any language. All UI display strings are stored in a XML File.

10.1 Language Settings on the Client

10.1.1 Location of the Language Settings on the Client

The name of the Language XML File is: <language>.XML

The language file is located in the sub folder **localization** of Documents Core Pack installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Client for MS CRM 2011\Localization"

Example:

The Language file for the English UI is: **en.xml**

<Language setting> is the language code that Documents Core Pack should use on the client. Each client can have their own language settings and files.

10.1.2 Modify the UI language on the Client

The UI Language is determined at start up by the registry setting "**Language**". To modify this setting, follow this procedure:

1. Press START – RUN
2. Type "regedit" and click OK
3. Locate the registry key **HKEY_LOCAL_MACHINE\Software\PTM EDV-Systeme\DocumentsCorePackClient2011**

4. Change the value of the "language" setting to another language
5. Close the registry editor

NOTE: In order to use another language than English, you need to create a copy of the "en.xml" language file, and rename it for a valid language setting. For example, to create a Dutch language file, rename the file to "nl.xml" and then translate the strings in the file.

After that you open the registry and change the value of "language" setting to **nl**.

10.1.3 How to translate a language file

You can use a Text Editor or a generic XML Editor to edit the language files.

The format of the XML tags in the language file is:

```
<!-- MENU/Toolbar Name -->
<LabelValues>
  <name>MenuMainCaption</name>
  <value>Microsoft CRM</value>
</LabelValues>
<LabelValues>
  <name>MenuMainToolTip</name>
  <value>Microsoft CRM</value>
</LabelValues>
<LabelValues>
  <name>btnchoosedata</name>
  <value>Choose CRM Data</value>
</LabelValues>
<LabelValues>
  <name>tooltipchoosedata</name>
  <value>Choose CRM Data for mail merge</value>
</LabelValues>
<LabelValues>
  <name>btncrmmailmerge</name>
  <value>CRM MailMerge</value>
</LabelValues>
```

You should **ONLY** modify the contents of the **<value>** tags. Do not modify the **<name>** tag.

10.2 Language Settings on the Server

10.2.1 Location of the Language Settings on the Server

The UI of Documents Core Pack Server can be modified to any language. All UI display strings are stored in a XML File.

The name of the Language XML File is: <language>.XML

The language file is located in the sub folder **localization** of Documents Core Pack installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Server for MS CRM 2011\Localization"

Example:

The Language file for the English UI is: **en.xml**

Note: The language XML-Files from the server and client component are different. If you want to translate Documents Core Pack you have to translate both files the language file on the client and on the server.

NOTE: In order to use another language than English, you need to create a copy of the "en.xml" language file, and rename it for a valid language setting. For example, to create a Dutch language file, rename the file to "nl.xml" and then translate the strings in the file.

10.2.2 How to translate a language file

Look at chapter [10.1.3](#)

11 Too long merge fields problem

In some cases there occurs a problem with too long merge field names. Word just support a length of 40 characters for a merge field.
So if you add two Fields called

```
{ MERGEFIELD customerid_contact_parentcustomerid_address1_country \*  
MERGEFORMAT }
```

```
{ MERGEFIELD customerid_contact_parentcustomerid_address1_fax \*  
MERGEFORMAT }
```

Word shows you (after ALT-F9) two fields called

```
«customerid_contact_parentcustomerid_addr»
```

```
«customerid_contact_parentcustomerid_addr»
```

So Documents Core Pack can't differentiate them !!
Now to solve this Problem we added the possibility to replace long Names with short Names. For e.g. "parentcustomerid" with "pc1".

11.1 Setup too long merge fields

Now to solve this Problem we added the possibility to replace long Names with short Names. For e.g. "parentcustomerid" with "pc1".

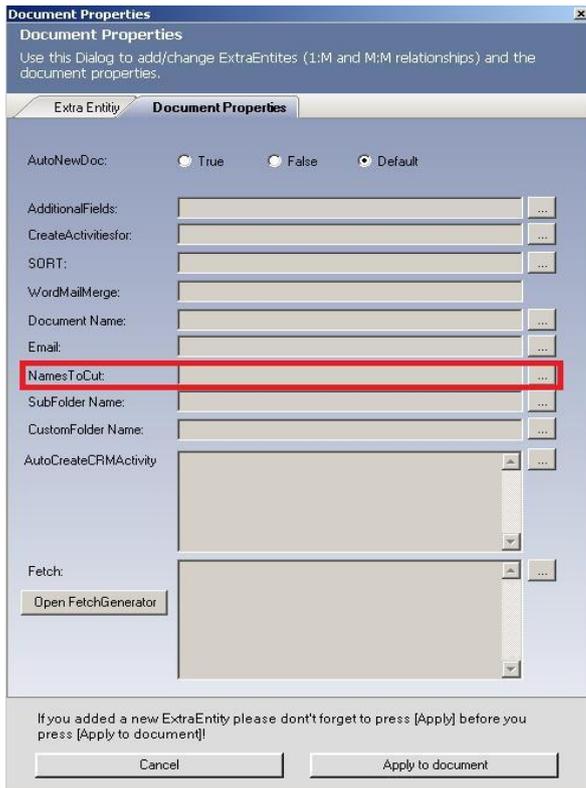
Notation: Old long – new short
Each pair separated by ",".

In the **settings-entity** of DCP-Server there is a new KEY called "**NamesToCut**".
(Do not change this name!)

```
parentcustomerid-pc1,parentaccountid-pa1
```

This means to replace "parentcustomerid" with "pc1", also to replace "parentaccountid" with "pa1".

You also are able to store this in the template.



So you can find "Document Properties": Microsoft Office Word <www.mscrm-addons.com><Insert MailMerge Fields><Document Properties>

These Template-NamesToCut-Settings **overwrites** the Settings from the server for the specific template!

DCP replaces now all findings, this means if you have an merge field called "customerid_parentcustomerid_parentaccountid_name" it will be changed to "customerid_pc1_pa1_name".

11.2 Important Information

If you change the NamesToCut KEY maybe all OLD Templates will be affected! Because in your old Templates the merge fields are still stored with the long name.

Example:

A existing Document with two merge fields.
parentaccountid_name and parentaccountid_fax

Now you change the setting to shorten parentaccountid to pc1.

NEW Templates will be filled right! (Insert Mail Merge Fields inserts the right short name into your Template.)

But all the OLD Templates which uses merge fields including parentaccountid will not work anymore! So you have to edit them! (Maybe the Replace... Function of Word will be a good Idea.)

Sometimes it will be the better Way to replace full merge fields. So instead of changing just a part of a merge field let DCP replace the whole one.

E.g.:

"customerid_contact_parentcustomerid_address1_fax" to
"cust_cont_par_adr1_fax"

So old Templates won't be affected but you have to add every Field to the settings.

12 Contact

If you have problems with the product send an Email to support@mscrm-addons.com or call +43 316 680 880 0