



**mscrm-addons.com**  
DocumentsCorePack for MS CRM 2013

## DocumentsCorePack for MS CRM 2013

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Version 6.5, October 2013

### **Client User Guide**

(How to work with DocumentsCorePack for MS CRM 2013)

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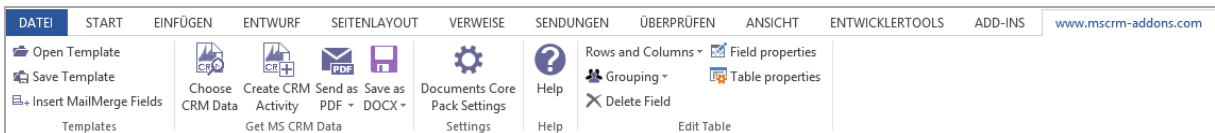
# 1 Introduction

This guide gives detailed explanations of all functionalities provided by DocumentsCorePack for MS CRM 2013.

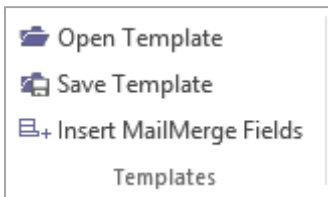
If you need to reach us, see the contact page.

DocumentsCorePack (DCP) provides the possibility to create and manage documents associated with data from CRM – in a comfortable and structured way. Additional utilities simplify and improve the use of MS CRM to optimize business processes like sending quotes or invoices.

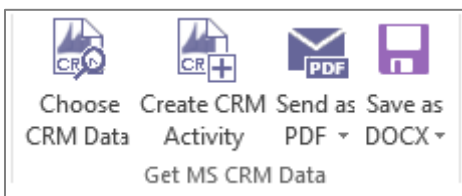
## 1.1 The Ribbon



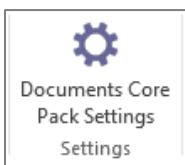
This Word-add-in works with our "Ribbon" in a very efficient way to use the following functions directly from Word.



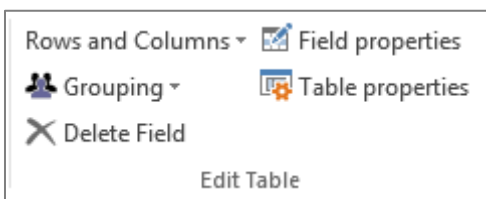
The "Templates" block provides the option to open and save templates, or to insert mail merge fields. Just everything you need to edit a new or an already existing template.



In the "Get MS CRM Data" block you can merge your created template directly within the Ribbon. "Choose CRM Data" to create an activity in CRM "Create CRM Activity" to send "send as" or to save "save as".



In the "Settings"-section all client-side settings can be specified.



The "Edit Table" offers table related and field related settings and the "Field properties" button with which you can make changes and advanced settings of the selected field.

## 1.2 Main Features:

- **Document generation**

This functionality enables the creation of Word-documents with data from CRM using templates. It is capable to resolve any relationship and works with custom, as well as standard CRM entities. Therefore, DocumentsCorePack provides the opportunity to e.g. create quotes or invoices including data from related records like "other contacts", accounts, products etc. The template management provides various features, such as the possibility to easily rename, save or relocate templates. Furthermore, users can choose the template which should be used for the document generation from a drop-down menu directly from the CRM menu ribbon.

- **Activity Creation**

DocumentsCorePack enables users to create letter-, e-mail- or fax-activities with the generated document as an attachment. Users can furthermore save a document directly to the proper location in CRM without the need of generating an activity due to the "Save as DOCX"-functionality. (Click [here](#) for details about this functionality.)

- **Send and Save capability**

The DocumentsCorePack addon provides the possibility to convert the generated documents into the listed file formats and to send them afterwards to their customers or partners. Therefore, DocumentsCorePack provides a powerful option to simplify accounting by handling invoices, quotes, orders, etc. more easily. Save as PDF, XPS, Doc, DocX, ODT.

- **Office Open XML (DocX)**

With DocX, a new technique for creating templates has been implemented. It provides several advantages like the automated creation of tables (e.g. list of quote-products, contacts from an account, activities) and an easy insertion of other documents or pictures from CRM. Furthermore, users have the possibility to insert contents which have been added to a CRM record via a html editor. This 'Insert as HTML'-functionality is able to interpret html codes stored in CRM and to display the contents appropriately in merged documents.(Click here for more details about this functionality and watch our Office Open XML demo-series for more details about the creation of docx templates.)

- **Bulk merge functionality for DocX templates**

With the bulk merge functionality, DocumentsCorePack offers further advantageous features for handling DocX templates. This new functionality enables users to create a large number of documents all at once using data from CRM. It provides several possibilities after the document generation, such as

- combining all generated documents to one single document whilst maintaining the page numbering
- storing all generated documents in one folder
- sending the documents to a printer
- Creating activities with the generated documents as attachments.

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

## 1.3 Demo Templates

Demo Templates provides the opportunity to start directly with DCP and you don't have to design an own Template to test the fully functionality of DocumentsCorePack.

After selecting a Template you can start directly to discover the wide Range of DCP. We offer you right after installing the DCP-Client, a wide variety of templates that can be found in the following Entities.

NOTE: If have just the MS CRM 2013 SAMPLE DATA not every Demo Template will show the correct Result. If you click at a following Template you will see all necessary requirements, and an exemplary use.

### Account

- [Account Reconnect .docx](#)
- [Account Overview .docx](#)
- [Contemporary Letter .docx](#)
- [List of Accounts related to this Account .docx](#)
- [List of Contacts related to this Account .docx](#)
- [Account QR Template .docx](#)

### Activity

- [Activity Overview .docx](#)
- [Contact Reconnect - Gift Certificate .docx](#)
- [List of Accounts related to this Contact .docx](#)
- [List of Contacts related to this Contact .docx](#)

### Quote

- [Quote Base .docx](#)
- [Quote With Grouping Base .docx](#)
- [Quote QR Template .docx](#)

### Invoice

- [Invoice Base .docx](#)
- [Invoice With Grouping Base .docx](#)

### Marketing list

- [Newsletter to all accounts of this marketing list .dot](#)
- [Newsletter to all contacts of this marketing list .dot](#)

### Opportunity

- [Opportunity Base .docx](#)

Account Reconnect

Which Data must your CRM contains to get a right Result

The Sample Data

What does the Template do

Simple Account Template just with fields from Account entity

Account Overview

Which Data must your CRM contains to get a right Result

The Sample Data and Data from each additional Entity

What does the Template do

Simple Account Template with Tables which contains Data from the given extra entities

Contemporary Letter

Which Data must your CRM contains to get a right Result

What does the Template do

List of Accounts related to this Account

Which Data must your CRM contains to get a right Result

The selected Account must contains other related Accounts

What does the Template do

Shows all Accounts from the selected Account

List of Contacts related to this Account

Which Data must your CRM contains to get a right Result

The selected Account must contains other related Contacts

What does the Template do

Shows all Contacts from the selected Account

Account QR Code

Which Data must your CRM contains to get a right Result

The Sample Data

What does the Template do

How to use the QR-Code Field with the Account entity

Activity Overview

Which Data must your CRM contains to get a right Result

The Sample Data and Data from each additional Entity

What does the Template do

Simple Activity Template with Tables which contains Data from the given extra entities

Contact Reconnect - Gift Certificate

Which Data must your CRM contains to get a right Result

The Sample Data

What does the Template do

Simple Activity Template just with fields from Activity entity



List of Accounts related to this Contact

Which Data must your CRM contains to get a right Result

The selected Contact must contains other related Accounts

What does the Template do

Shows all Accounts from the selected Contact

List of Contacts related to this Contact

Which Data must your CRM contains to get a right Result

The selected Contact must contains other related Contacts

What does the Template do

Shows all Contacts from the selected Contact

Quote Base

Which Data must your CRM contains to get a right Result

You must have at least One Quote

What does the Template do

Simple Quote Template just with fields from Quote entity

Quote With Grouping Base

Which Data must your CRM contains to get a right Result

You must have at least One Quote, Products and Prices

What does the Template do

Simple Quote Template

Quote QR Template

Which Data must your CRM contains to get a right Result

You must have at least One Quote, Products and Prices

What does the Template do

How to use the QR-Code Field with the Quote entity

Invoice Base

Which Data must your CRM contains to get a right Result

The Sample Data

What does the Template do

Simple Invoice Template just with fields from Invoice entity

Invoice With Grouping Base

Which Data must your CRM contains to get a right Result

The Sample Data

What does the Template do

Simple Invoice Template

Newsletter to all accounts of this marketing list

Which Data must your CRM contains to get a right Result

You must have a Marketing list with at least One Account

What does the Template do

Generates a Document for each Account in this Marketing list

---

|  |
|--|
| Newsletter to all contacts of this marketing list            |
| Which Data must your CRM contains to get a right Result      |
| You must have a Marketing list with at least One Contact     |
| What does the Template do                                    |
| Generates a Document for each Contact in this Marketing list |

---

|   |
|---|
| Opportunity Base  |
| Which Data must your CRM contains to get a right Result |
| The Sample Data   |
| What does the Template do                               |
| A Simple Sample Template for an Opportunity Letter      |

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## 1.4 Dependencies between AutoMerge and DocumentsCorePack

AutoMerge and DocumentsCorePack are separated mscrm-addon.com products which work very closely together.

DocumentsCorePack client is a standalone software to design complex templates and merge them to documents directly in MS Office Word. The DocumentsCorePack client is a Word Add-in.

AutoMerge is a service to fully automated merge templates right in your CRM workflows and dialogs. As AutoMerge does not have the capability to help you design your templates the DocumentsCorePack client takes over this role.

For a more detailed view on each Product take a look at the following links:

Automerger(AM)

[Automerger \(AM\) Documentations](#)

Documents Core Pack (DCP)

[Documents Core Pack \(DCP\) Documentations](#)

## 2 Usage

First things first so welcome to the “how to use DCP” User Guide. In this Chapter we introduce you the possibility of Generate and Merge a Document, out of a previous created Template. If you want to know how you can create a Template with DCP of MS CRM 2013 go to [How to create DocumentsCorePack Templates](#)

If you selected your Template, you have to choose if want to do a Single or a Bulk Merge

- [Single Merge](#)
- Bulk Merge

### 2.1 Single Merge and generate a Document

A Single Merge provides you the opportunity to Merge a previous created Template and further process by creating an activity, save it or send it.

If you don't know how to configure the Save-Locations please click [here](#)

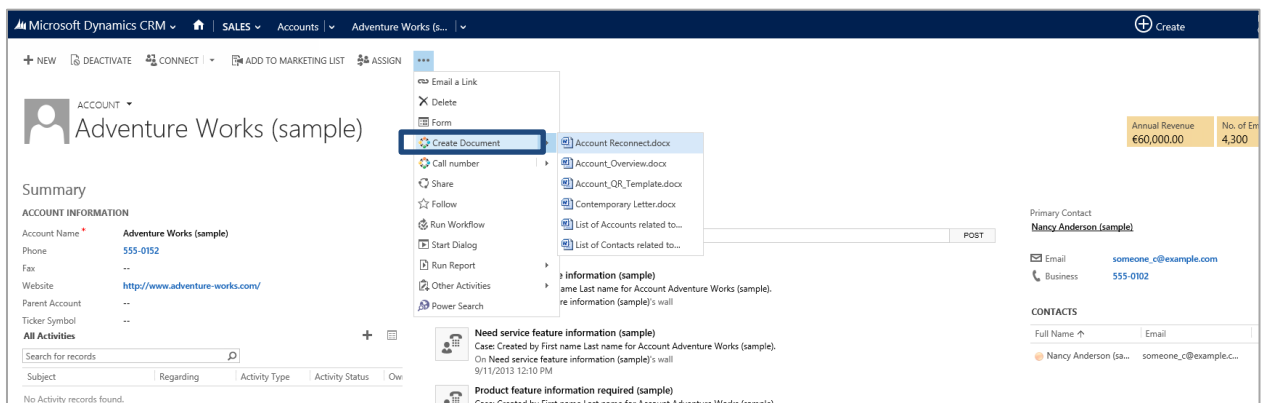
#### 2.1.1 Generate a Document – Step by Step

This is the Step by Step description for How to Generate a Document by already knowing which Template you want to merge. You can do this in two different ways, on the one hand directly out of CRM on the other hand right out of Word.

##### 2.1.1.1 Out of CRM

#### Step 1: Open a quote and click on the new button ‘Create Document’

First, we need to generate a document. Open the CRM-Record for which you want to generate the document. A merge can be directly started out of CRM with the “Create Document”-button which is placed at the CRM menu at the top. It is accessible from the grid view in order to select multiple records at once. And next to this, in the menu of the record itself.



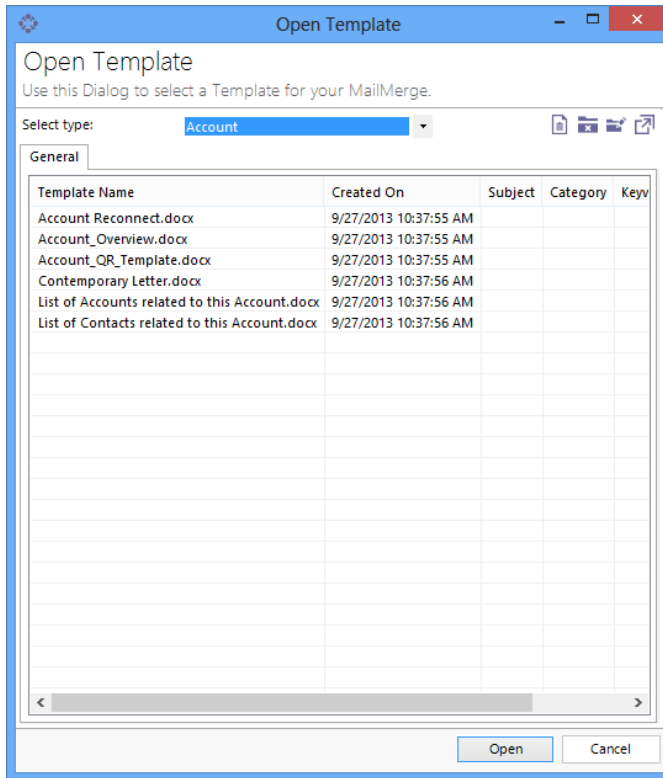
The screenshot shows the Microsoft Dynamics CRM interface for an account record named 'Adventure Works (sample)'. The 'Create Document' option is highlighted in the top menu bar and also in the account record's context menu. The context menu also includes options like 'Call number', 'Share', 'Follow', 'Run Workflow', 'Start Dialog', 'Run Report', 'Other Activities', and 'Power Search'. The account summary shows 'Annual Revenue' of €60,000.00 and 'No. of Emp' of 4,300. The primary contact is Nancy Anderson (sample) with email someone\_c@example.com and phone 555-0102. The bottom of the screen shows activity records for 'Need service feature information (sample)' and 'Product feature information required (sample)'.

We search and open the CRM-record we want to create a document for and start with a click on “Create Document”. In our case we will use a quote

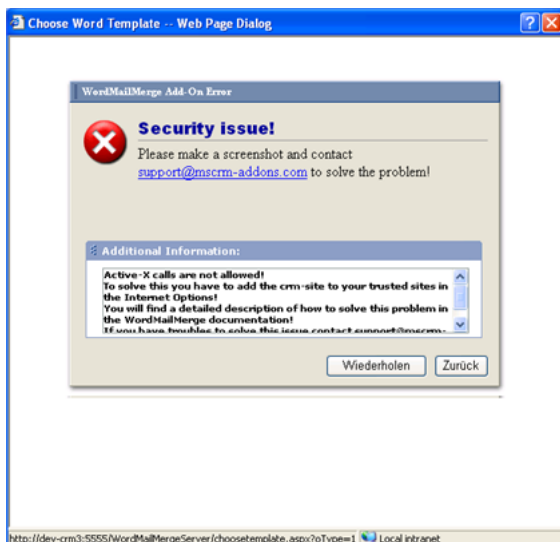
## Step 2: Select a Template

Click on the drop-down "Create Document"-button in the Menu and select the template. After chosen your template it will be opened in Word.

A window appears which allows you to select the template you want to use. Choose a template and proceed with a click on "Open Template".



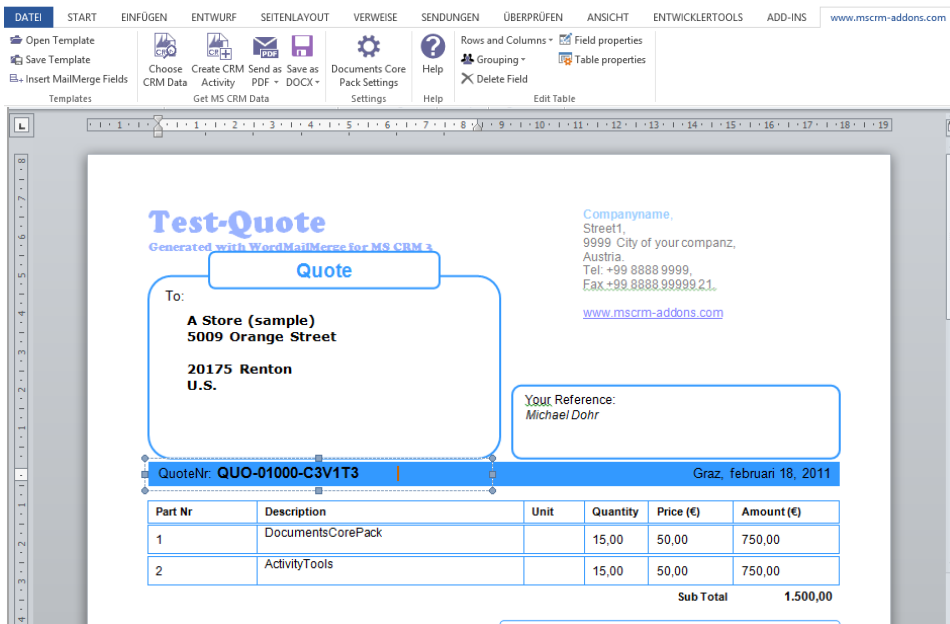
PLEASE NOTE: If you receive the following 'Security issue', open the installation guide and go to chapter 7 (Installing the client component/prerequisites). There, you will find a description of what you have to do to solve this issue.



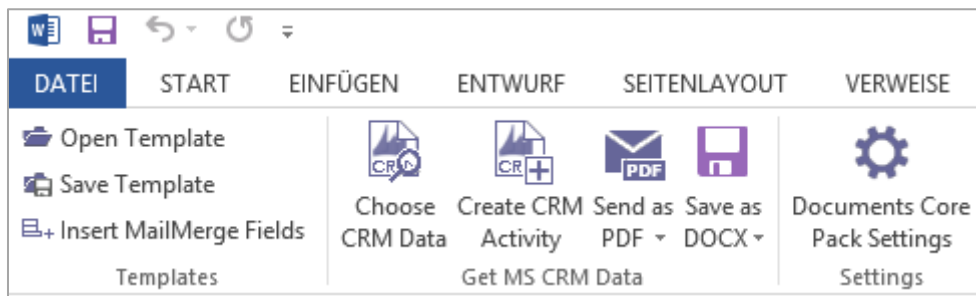
### Step 3: Result

Once this is done it will start to load the data and create a new document. (See screenshot below). You can see the information of the recipient at the top, the list of line-items referring to the quote.

As result you get a quote which has already replaced the merge fields with all the data out of the MS CRM.



Now, the document is ready and we proceed at the [www.mscrm-addons.com](http://www.mscrm-addons.com) – ribbon at the top. (See next screenshot).

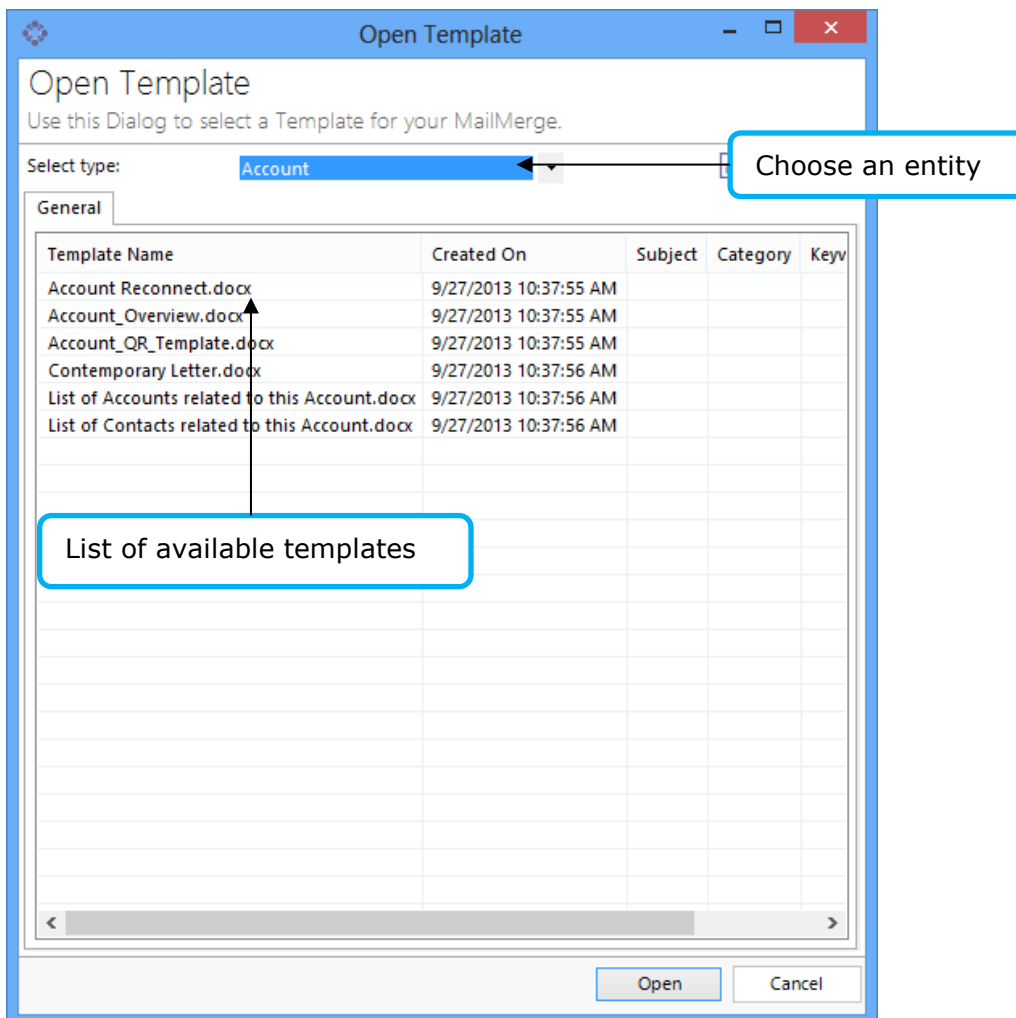
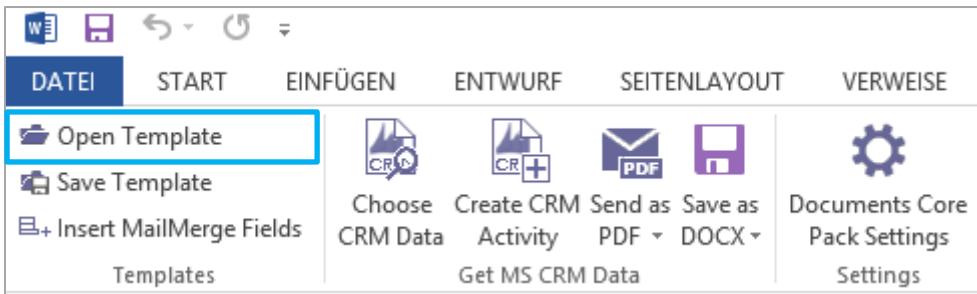


It contains several options, like create a template with the "Insert MailMerge Fields"-option, "Create CRM Activity" or to send the document as a .pdf. Click on the [www.mscrm-addons.com](http://www.mscrm-addons.com) sign. Here you can, for example save your document back to the specific SharePoint folder related to the CRM-record. Or send your Document directly by clicking on the "Send as"-button.

2.1.1.2 Out of Word

**Step 1: Open Word and choose a template**

The templates are separated by entities, this means that every template belongs to an entity. Click on "Open Template" in "DocumentsCorePack for MS CRM".

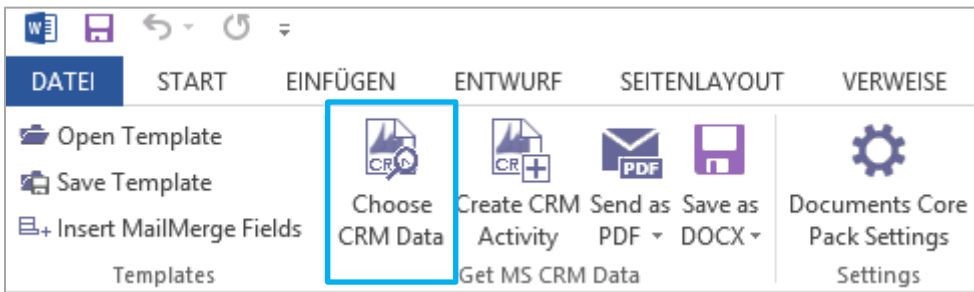


We can proceed with a click on [Open Template].

A document based on the selected template will be opened. Now we can proceed with merging the Template.

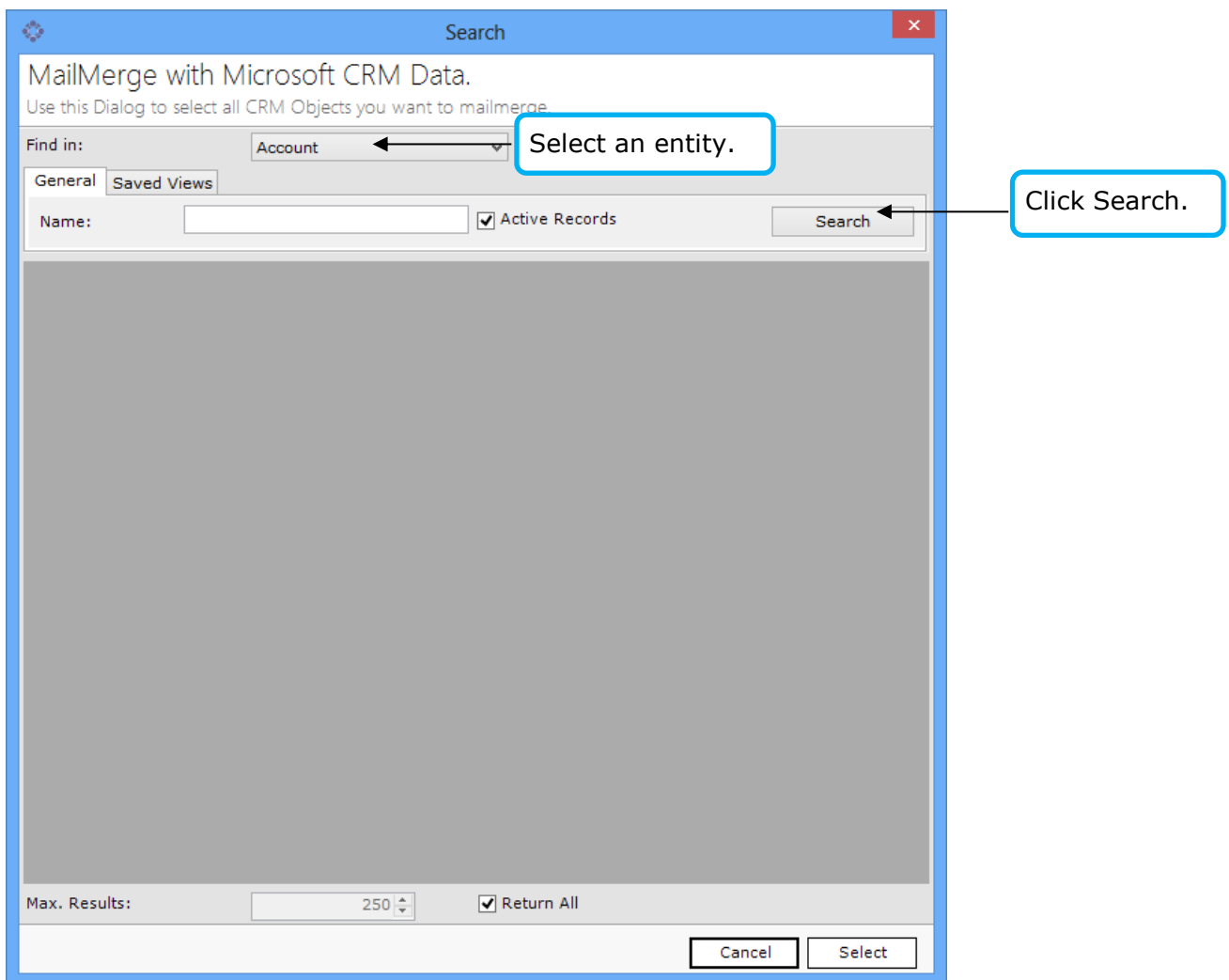
### Step 2: Choose CRM Data

Now we have to select the contacts we want to create a letter for. Therefore, we proceed with a click on "Choose CRM data"



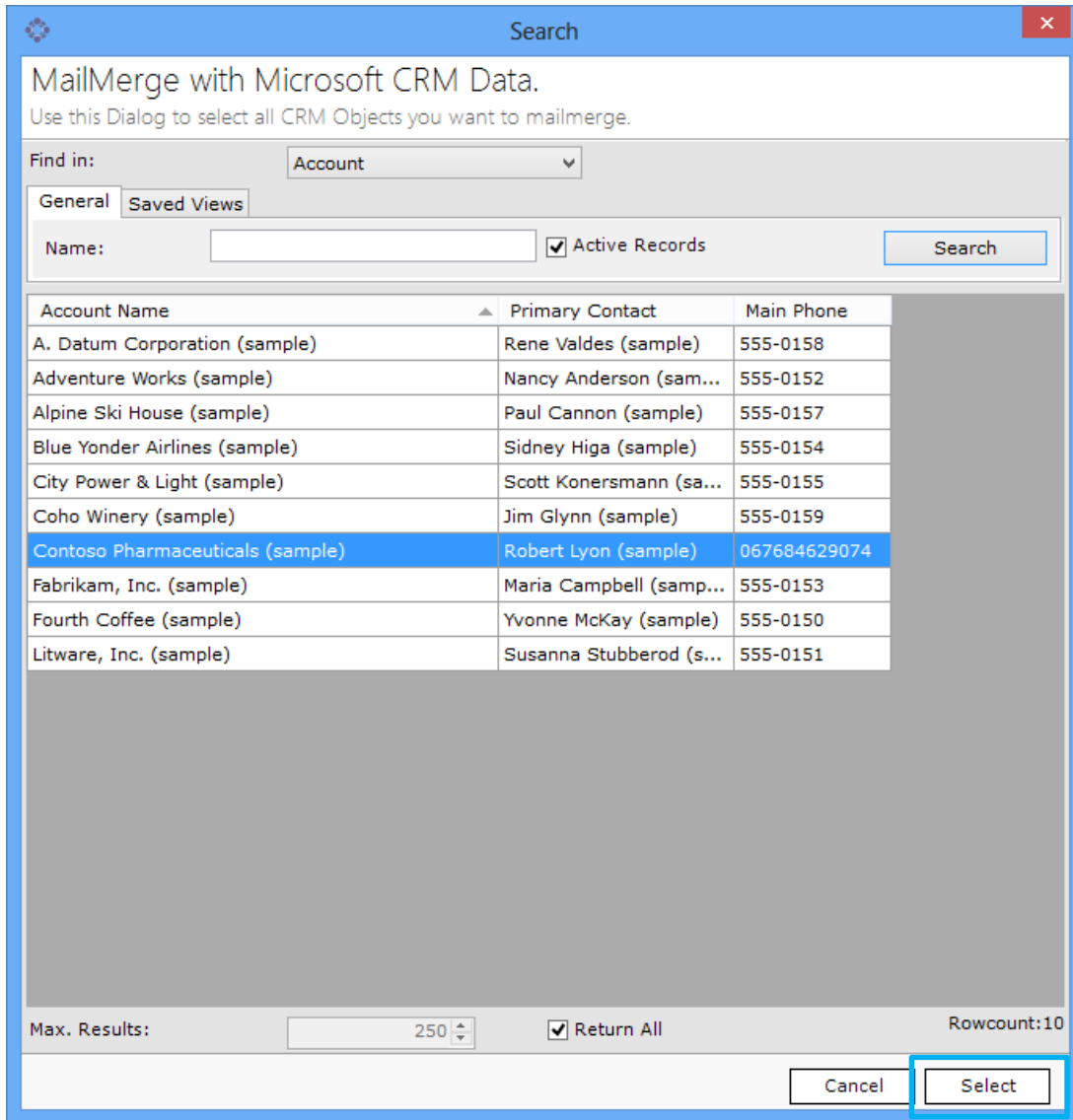
### Step 3: Search Window

The search window appears.



**Step 4: Select the records and click on the [Select] button**

Once we have found the record we want to merge, we can select the entry and proceed with a click on [Select]

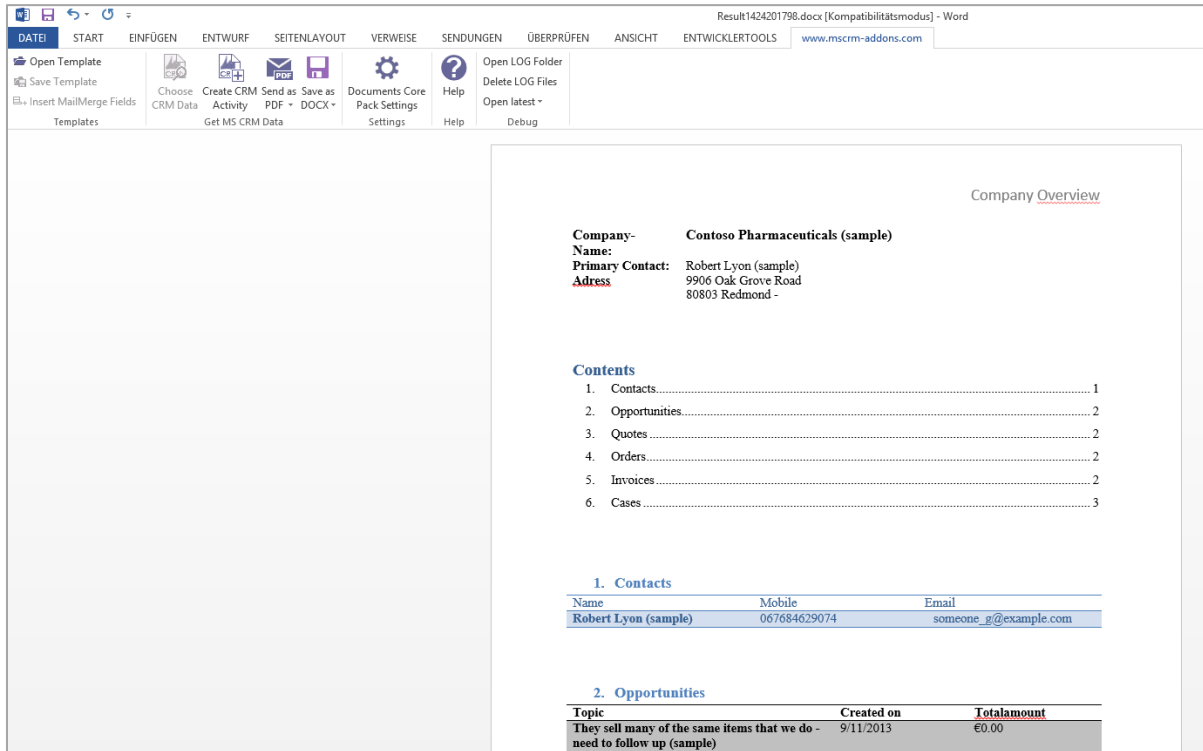


The data will be loaded into MS Word, and now a new Instance of Word appears with the merged Content.



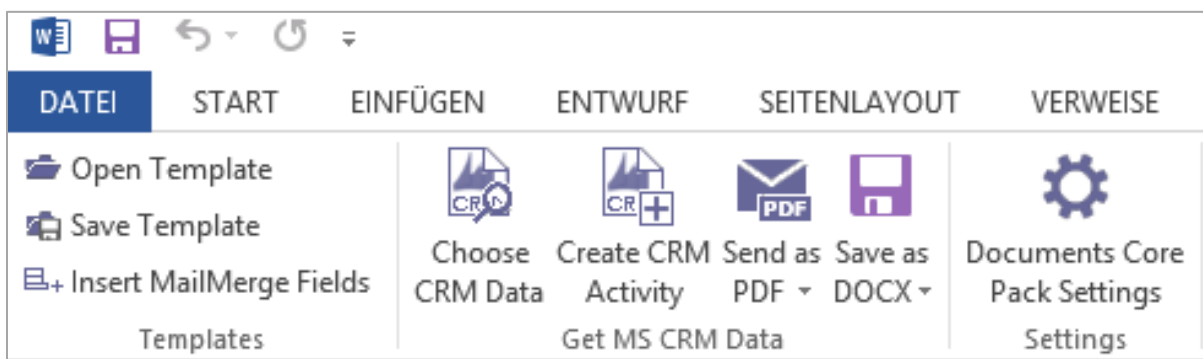
## Step 5: The Result

Once this is done it will start to load the data and create a new document. (See screenshot below).



As result you get a Document which has already replaced the merge fields with all the data out of the MS CRM.

Now, the document is ready and we proceed at the [www.mscrm-addons.com](http://www.mscrm-addons.com) – ribbon at the top. (See next screenshot).



It contains several options, like "Create CRM Activity" or to send the document as a .pdf. Here you can, for example save your document back to the specific SharePoint folder related to the CRM-record. Or send your Document directly by clicking on the "Send as"-button.

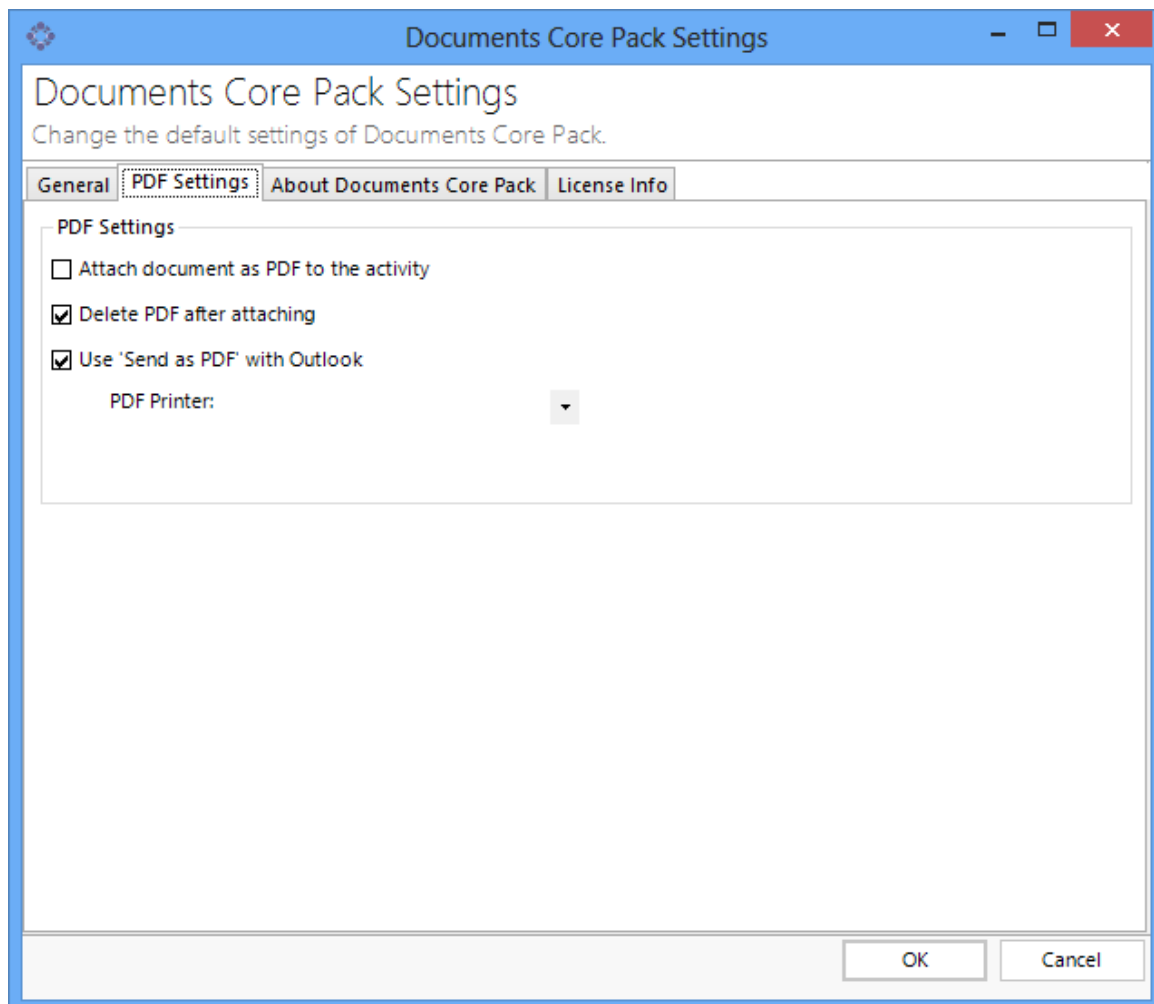
## 2.1.2 Additional DCP functions

In this Chapter we show you the further process of Templates after you merged them. For that you have three main functions "creating an activity", "save as" and "send as". The following steps require a correct configured Save-Location. For more information, please read [chapter 5.2](#).

### 2.1.2.1 Send as PDF

INFO: PDF-settings

These settings can be accessed in MS Word->DocumentsCorePack Settings->PDF-settings (2<sup>nd</sup> tab). Here we can define which PDF-printer should be used, how the temporarily saved PDF files should be handled and whether Outlook should be used to send the email or not.

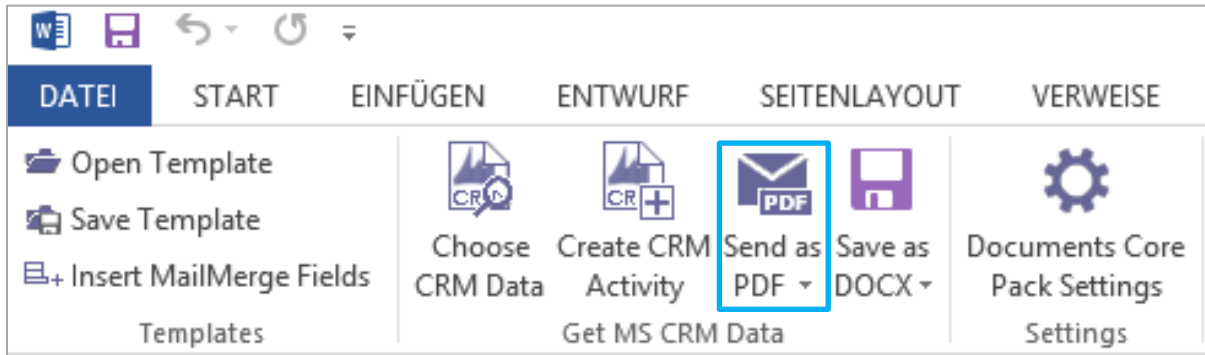


A PDF Printer:

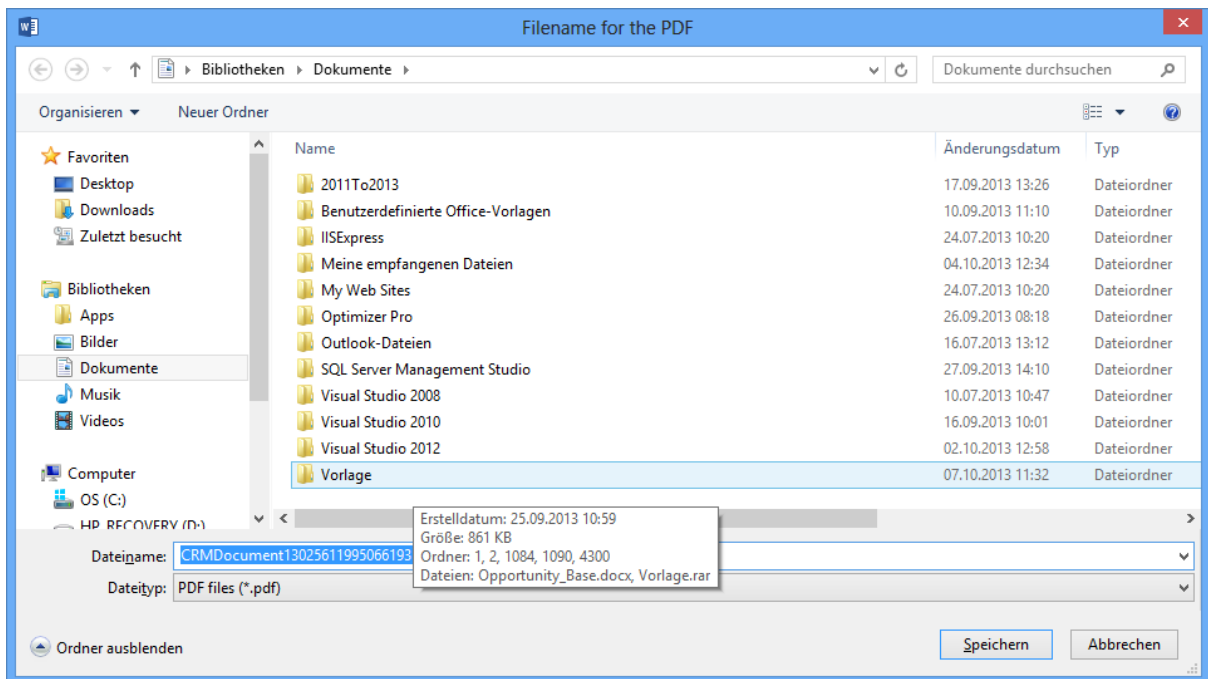
- MS Office Save as PDF Add-In for Office 2007 / 2010 ([free Download](#))
- PDF Creator ([free Download](#))

**Step 1: Click on "Send as PDF"**

Click on the button.



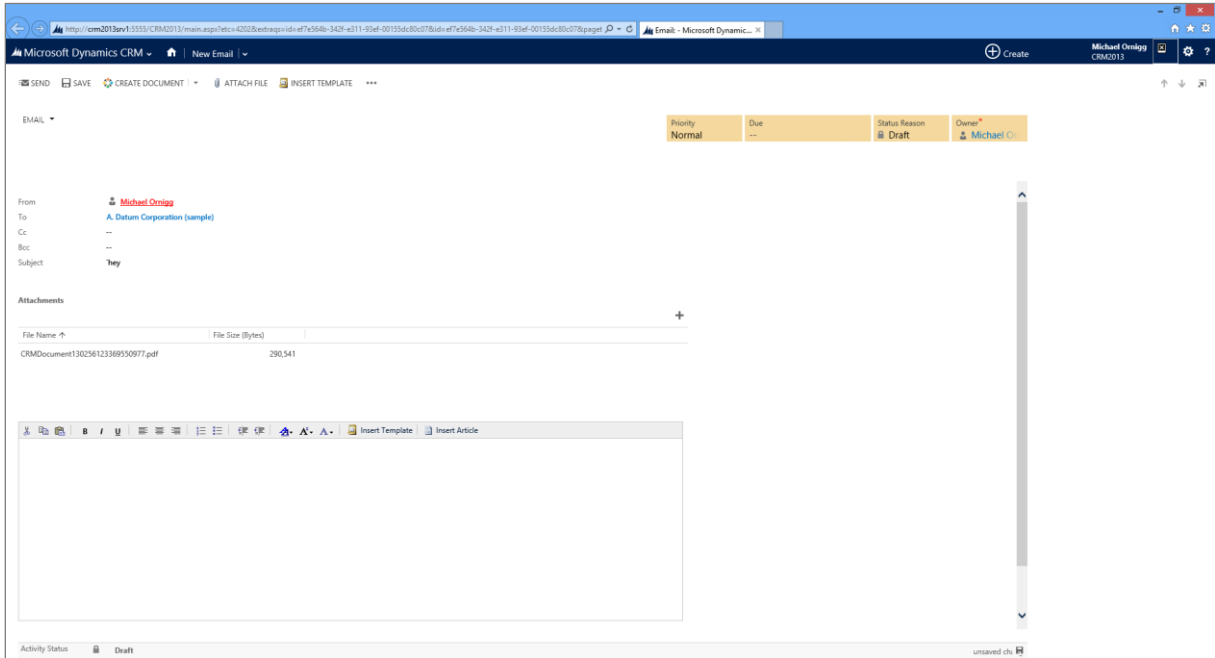
Afterwards, a "SaveFile-dialog" will appear that allows us to choose the name for the PDF-file and the location where it should be saved temporarily.



After clicking [Save], DCP will automatically generate the PDF and will create and bring up a new email-activity with the PDF-file attached.

## Step 2: Result

The following window appears and we can now add email-content before sending the email with the attached PDF.



In the "Attachment"-section below (shown in the next screenshot), we will see the attached PDF-file.

| Attachments                       |                   |
|-----------------------------------|-------------------|
| File Name ↑                       | File Size (Bytes) |
| CRMDocument130256123369550977.pdf | 290,541           |

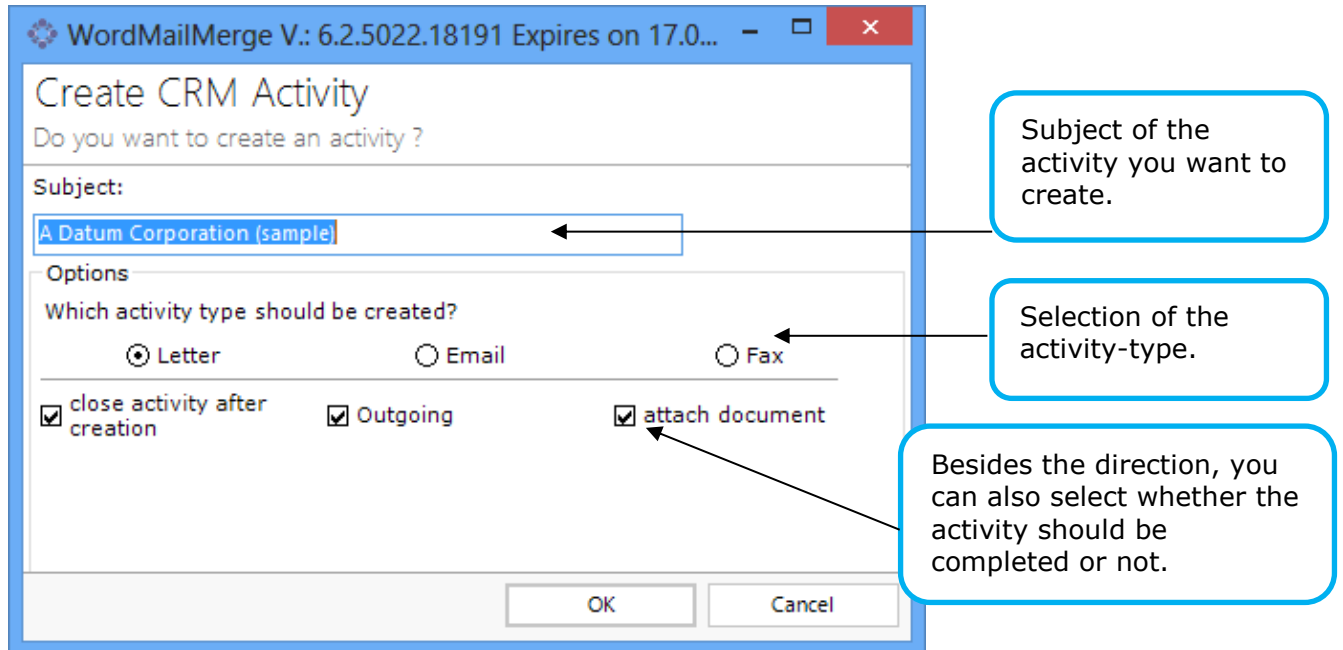
NOTE: Result – With "use Send as Pdf with Outlook" Option

In this case, a new email will be opened in Outlook. (For more information, please read [chapter 6 "Sending Mails via Outlook"](#)). Or click on the E-Mail-Tap at the top and send it to the customer.

### 2.1.2.2 Create CRM Activity

Next to the "Send as PDF"-option, DCP provides the possibility to Create letter-, fax- and email-activities with the document attached.

The following dialog will pop up after pressing the [Create CRM Activity]-button:



If you want to create a new activity for a document where an activity has already been created, you'll see a dialog that allows to select whether to create a new activity, add the document to the existing activity or to replace the existing document with the new one.

#### 2.1.2.2.1 Fax/Letter

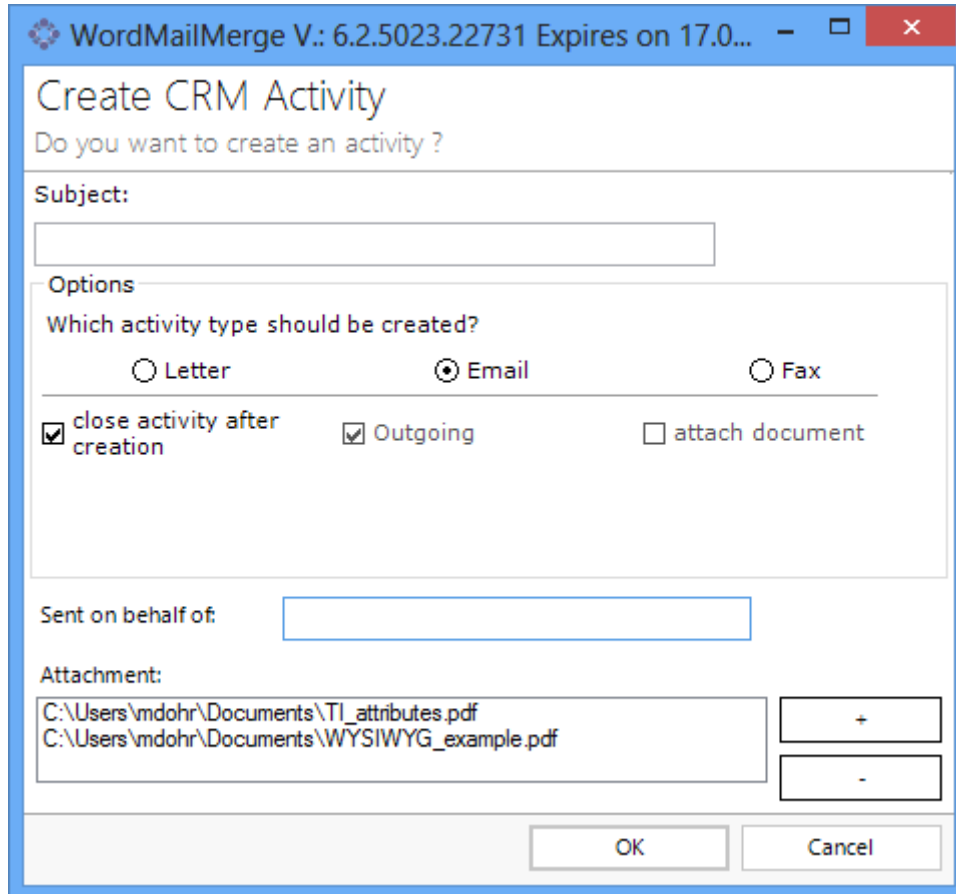
After you've selected a Subject you have to choose what type of Activity you want to create. If you've chosen "Letter" or "Fax" the following steps are the same.

Click [OK] and the Word-document is saved now.

INFO: What happened with the Document in you CRM and how/where the File will be saved depends on your Save-Location Configuration. For more information, please read [chapter 5.1](#) "Configure Save-Location (SharePoint/File share Paths)".

## 2.1.2.2.2 Email

Selecting "Email" allows you to define some email-specific properties:



Subject: subject of the created email

Sent on behalf of: define the sender (from-email address); If empty, the default sender used by Outlook will be set.

Attachment: allows to add some attachments like Terms & Conditions or any other document  
In our example we are sending the "Gift Certificate" mail including 2 files to 4 contacts.

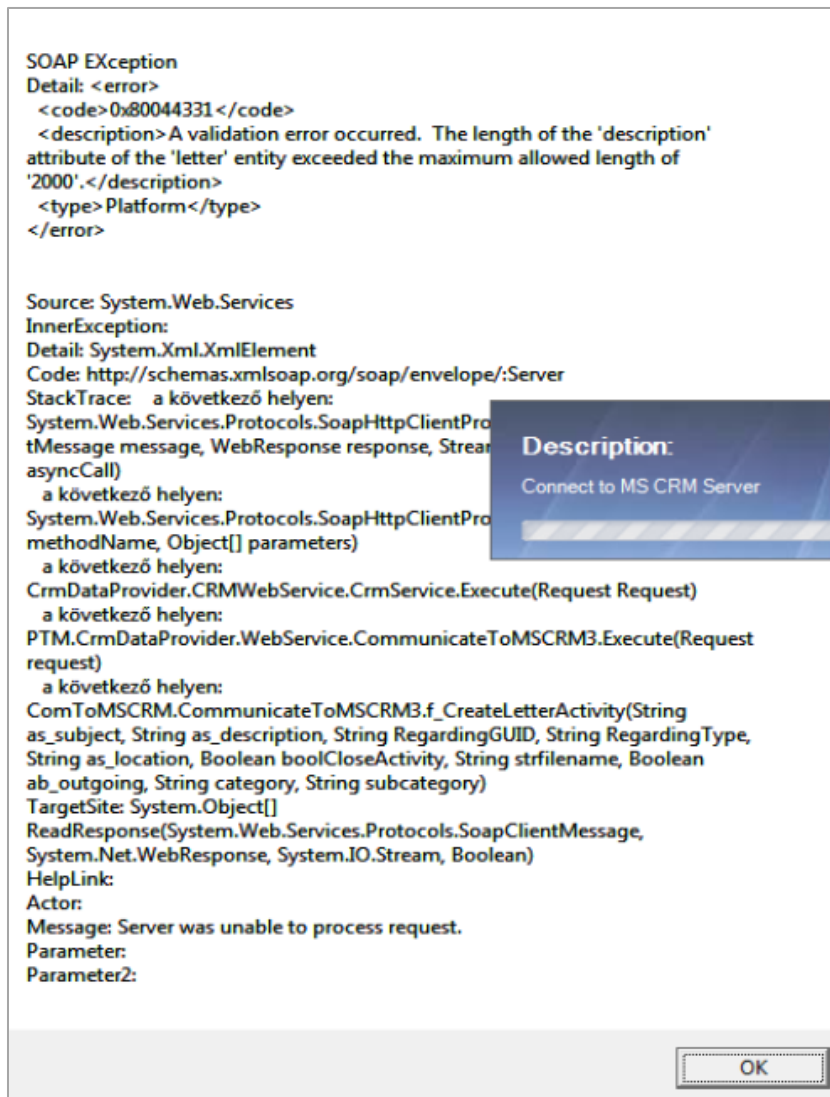
Everything is defined, so we can proceed with a click on [OK]

INFO: What happened with the Document in you CRM and how/where the File will be saved depends on your Save-Location Configuration. For more information, please read [chapter 5.1](#) "Configure Save-Location (SharePoint/File share Paths)"

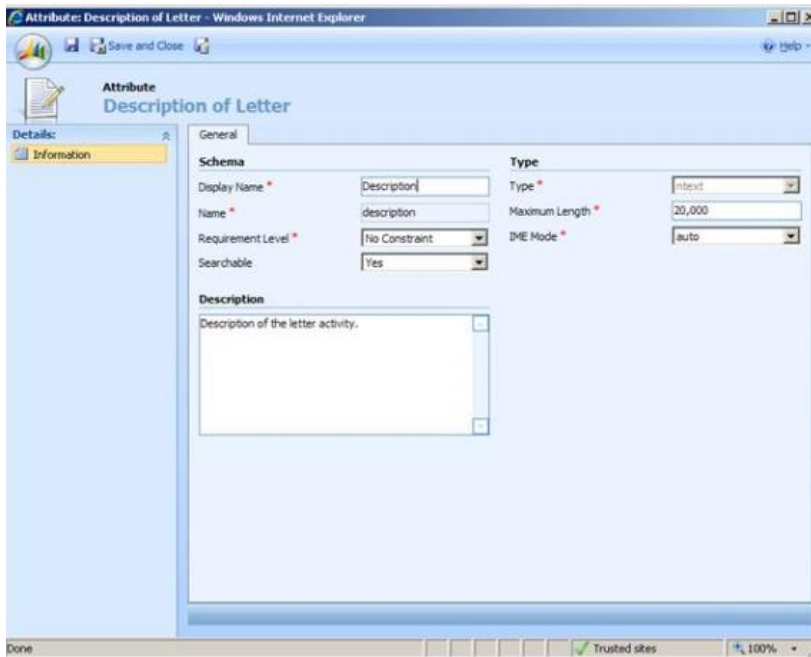
### 2.1.2.2.2 Troubleshooting

The length of the CRM "description"-field is limited to a maximum length of 2000 characters. Following window will pop up if you try to create a letter activity and its description exceeds the maximum length:

Fail: Soap Exception



To change the value of the CRM "description"-field open CRM with Internet Explorer and click on "Attributes". Click on the "description" attribute and change the field "Maximum Length". (See next screenshot)

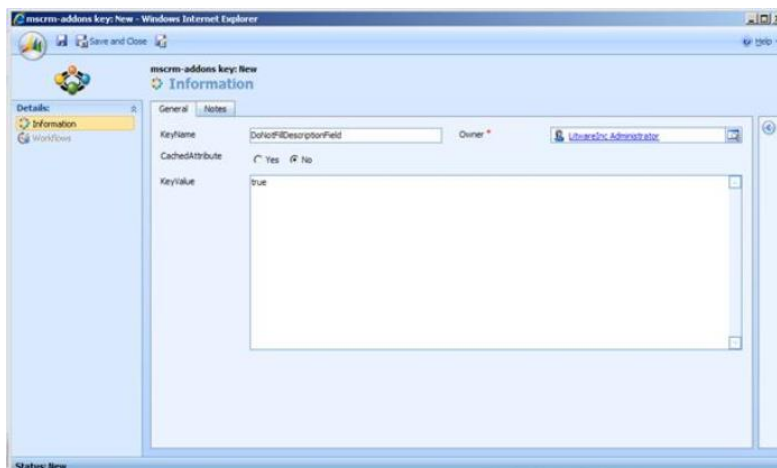


After the changes are saved, click on the "Publish" button within the "Customize Entity" window. (See next screenshot)



The second option would be to define a new "Settings-key". (Only possible since DCP Client v4.53). To do this, open your CRM and go to "Settings" and choose "MSCRM-ADDONS.com". Then go to "Products:" and select "DocumentCorePack". With left click on "MSCRM-ADDONS.com" you get to the "Settings-key".

Now create a new "Settings-key" with the name "DoNotFillDescriptionField" and give it a value "true" (field blank) or an integer (number of characters is either the same or smaller than the actual length attribute). E.g.: if you type in a value of "400" then 400 characters will be shown and the rest is cut.





### 2.1.2.3 Save as DOCX

Saving documents back to CRM without creating an activity

This new feature offers you the option to save a document directly to the proper location in CRM without the need of generating an activity. Up until now, the only option you had was "Create CRM Activity" which always generated an email-, fax- or letter-activity. The location depends on the configuration. This is defined within the DocumentsCorePack server configuration tool.

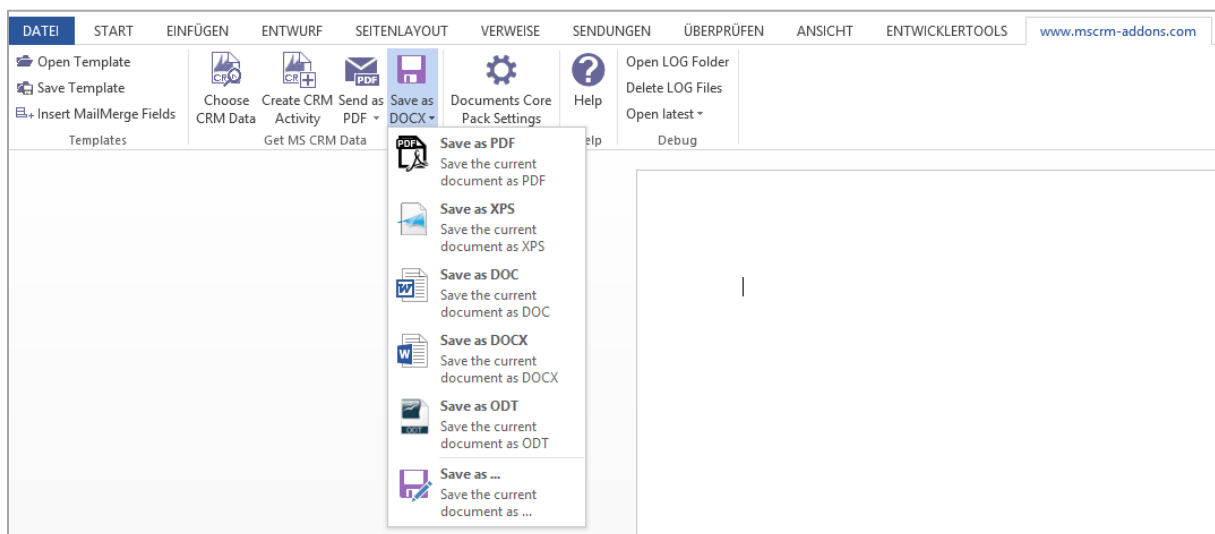
Once the latest DocumentsCorePack client version is installed (version upgraded), this new feature will be available as an additional button in the ribbon of our add-on in Microsoft Word.

#### Specification

The save document feature is an additional button in the ribbon of the DocumentsCorePack add-on.

The button enables you to save a merged document to a specific location without the need of generating an activity.

The document can be saved in various formats, directly from the drop down menu. The button itself saves the document as a Microsoft Office Word Open XML document (docx). Document types that are support by Word but not listed in the menu can be selected with the "Save as..." option.



DocumentsCorePack template properties like "Document Name", "Create Activities For" and "Save-To Subfolder" affect the location and the name of the document when using this feature.

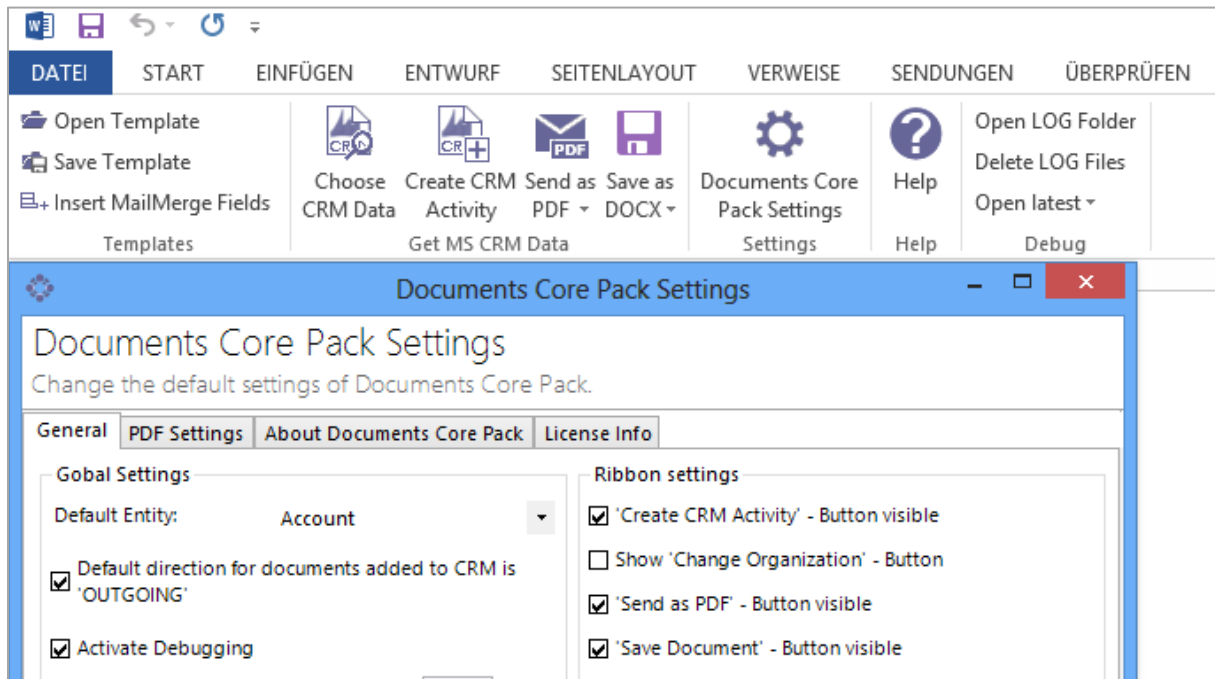
PLEASE NOTE: Directly after the merge the document might only have a generic name (e.g. "Result1223473.docx") the DocumentName property will then be applied when you use the "Save as DOCX" button.

If no DocumentName property is set, the name that is displayed in the header of Word (e.g. "Document1", "Result1223473.docx") will be used in the save document location.

## Configuration

If you do not want to use this new feature or if you want to enable it again, you can change your DocumentsCorePack Settings.

To gain access to the settings dialog, open Word and navigate to "www.mscrm-addons.com" -> "Documents Core Pack Settings" -> "General".



The needed setting is called "'Save Document' - Button visible" as in the screenshot above.

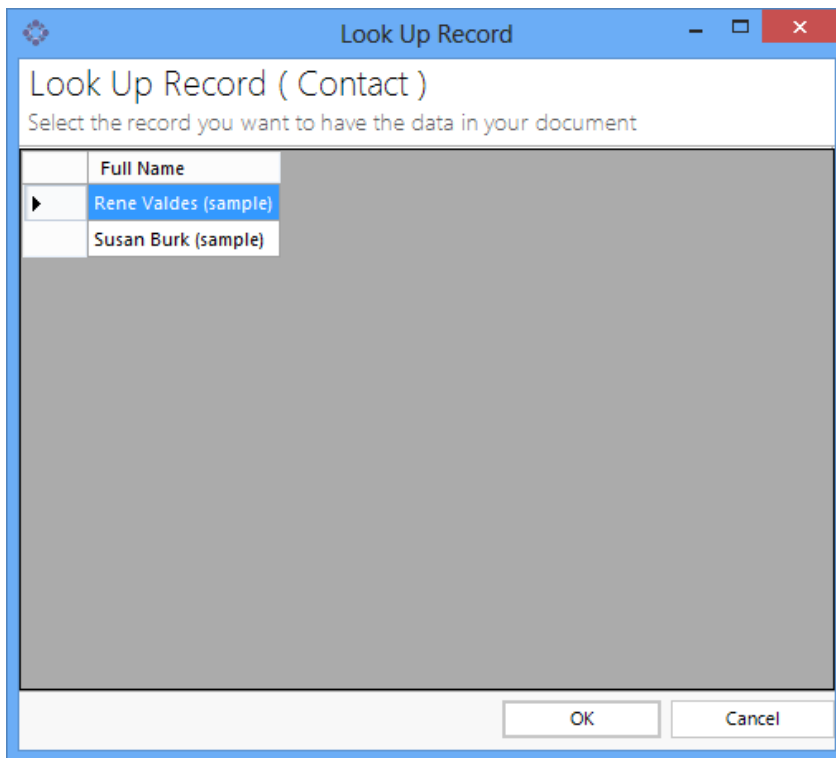
### 2.1.3 How to pre-filter result rows before generating a document

We have created a new function offering the possibility to use a dialog to pre-filter the result rows. This will be helpful when the user needs to select a specific related entity (e.g. contact...) before starting to generate the document.

This feature is available with version 5.26 upwards and only for DOCX-templates.

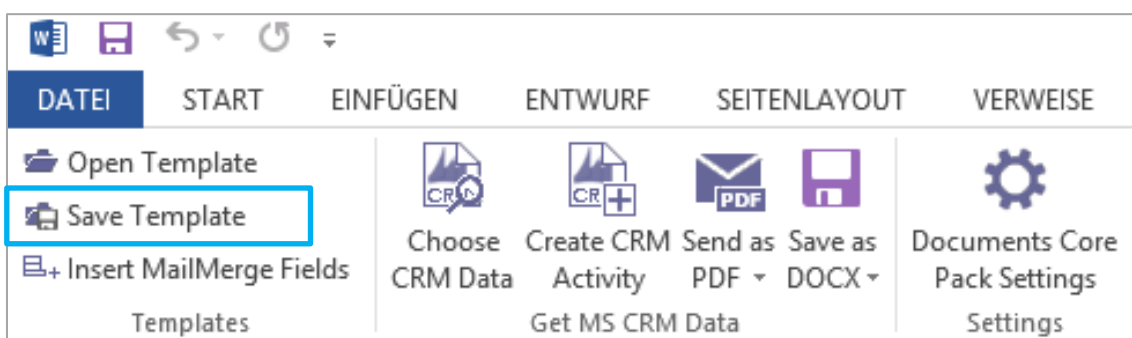
After the configuration steps described below, the users will get a "Look Up Record"-window (e.g. like the one in the screenshot below) when opening the DocX-template. In this window, they can choose one or more of the pre-filtered records and afterwards start to generate the document.

In the example shown in the following screenshot, users can select one or more contact(s) of an account. Afterwards, they are able to generate the documents with the selected contact(s).

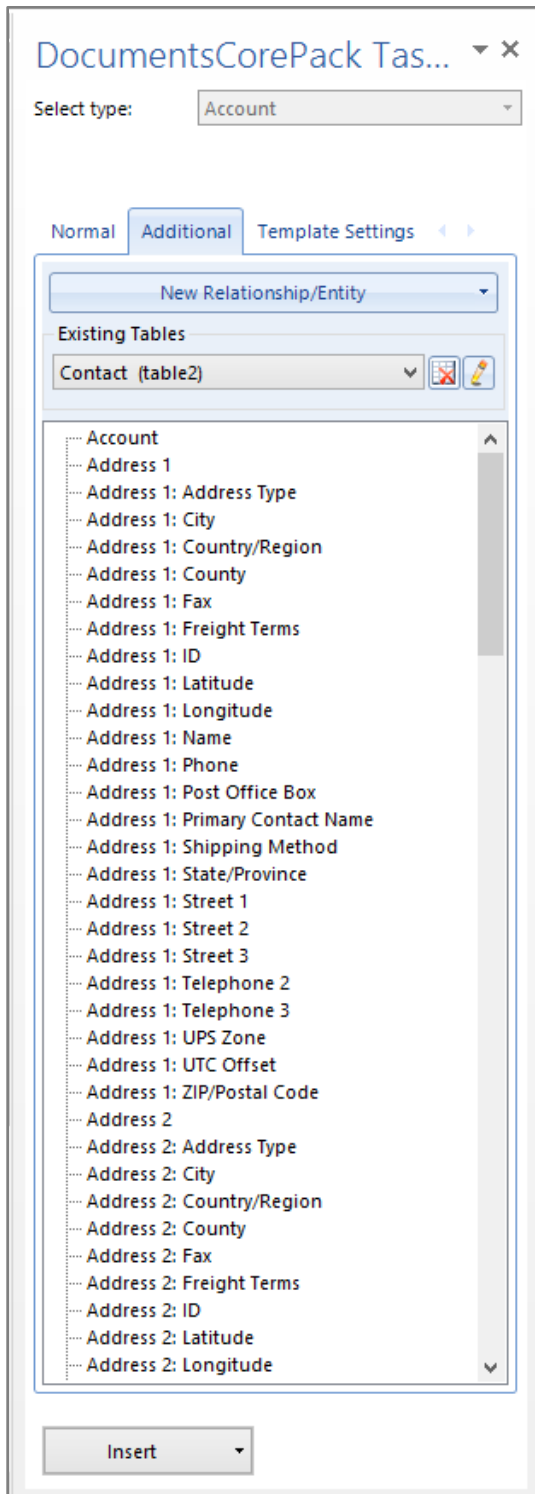


How to set this up in the template:

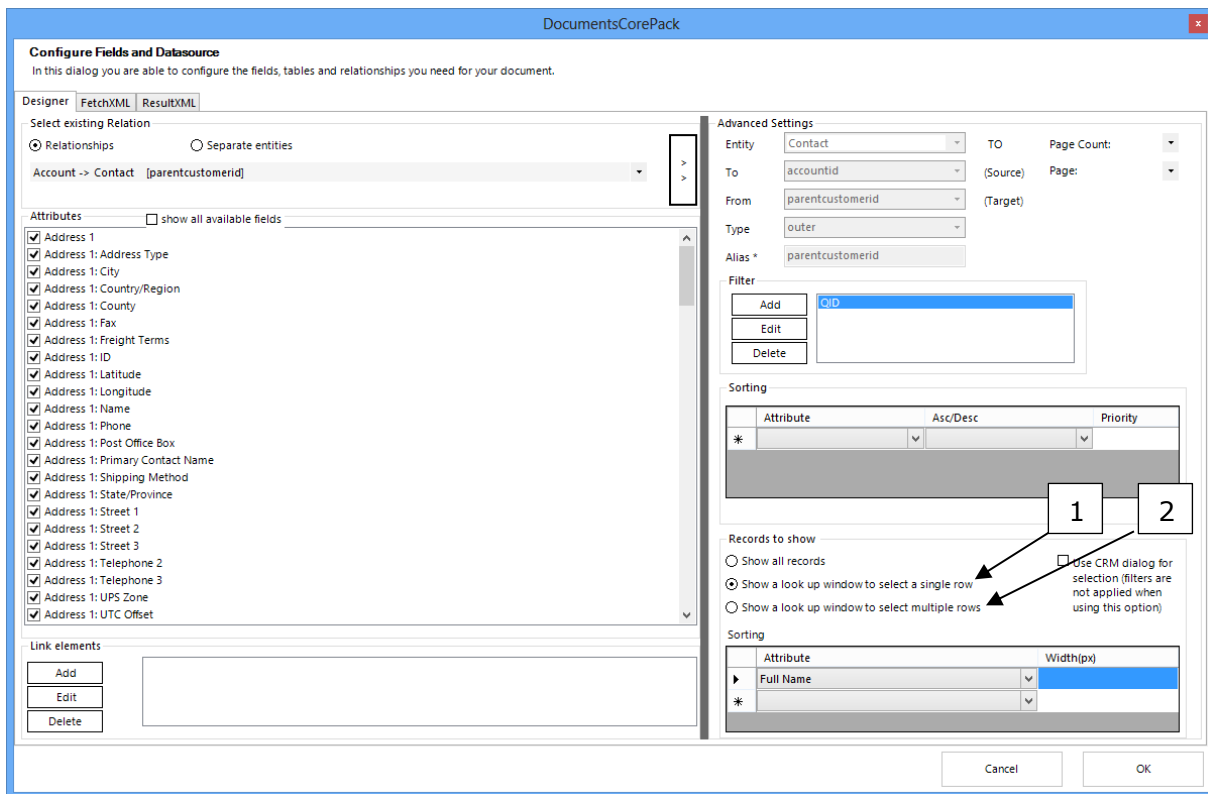
First, you have to open the template and to click on "Insert MailMerge Fields".



Go to the additional tab, select a relationship and click on the "edit"-button. This is the base for the filtering process.



In the "Records to Show"-section of the window you can choose if you want a selection and which type. (Single or multiple, see arrows in next screenshot)



The "column order"-section enables you determine the order and the width of the columns within this lookup window.

## 2.2 Bulk Merge and Letter with more than one Record

This chapter will show some of the basic features provided by DCP regarding mailmerge-procedures with multiple records.

This includes:

- 1) Create letters for multiple records (e.g. contacts)
- 2) Using saved views to choose data
- 3) Running a mailmerge for marketing lists

### 2.2.1 "Office Open XML (.docx)" – Bulk Merge

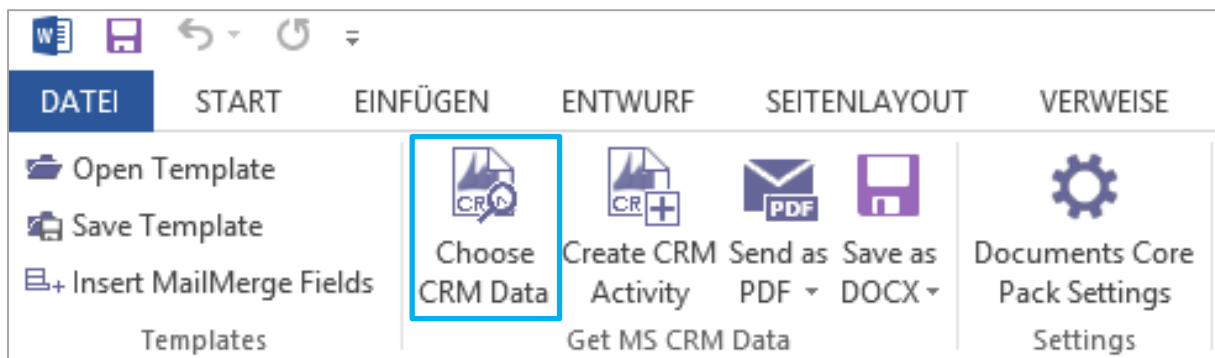
All the following Step by Step descriptions will presuppose that you had a "ready to merge" Template. If you don't know how to get a Template ready to merge take a look at [open a Template](#)

#### 2.2.1.1 Letters with more than one record – Step-by-Step

In our example we want to send a certificate-letter to some contacts.

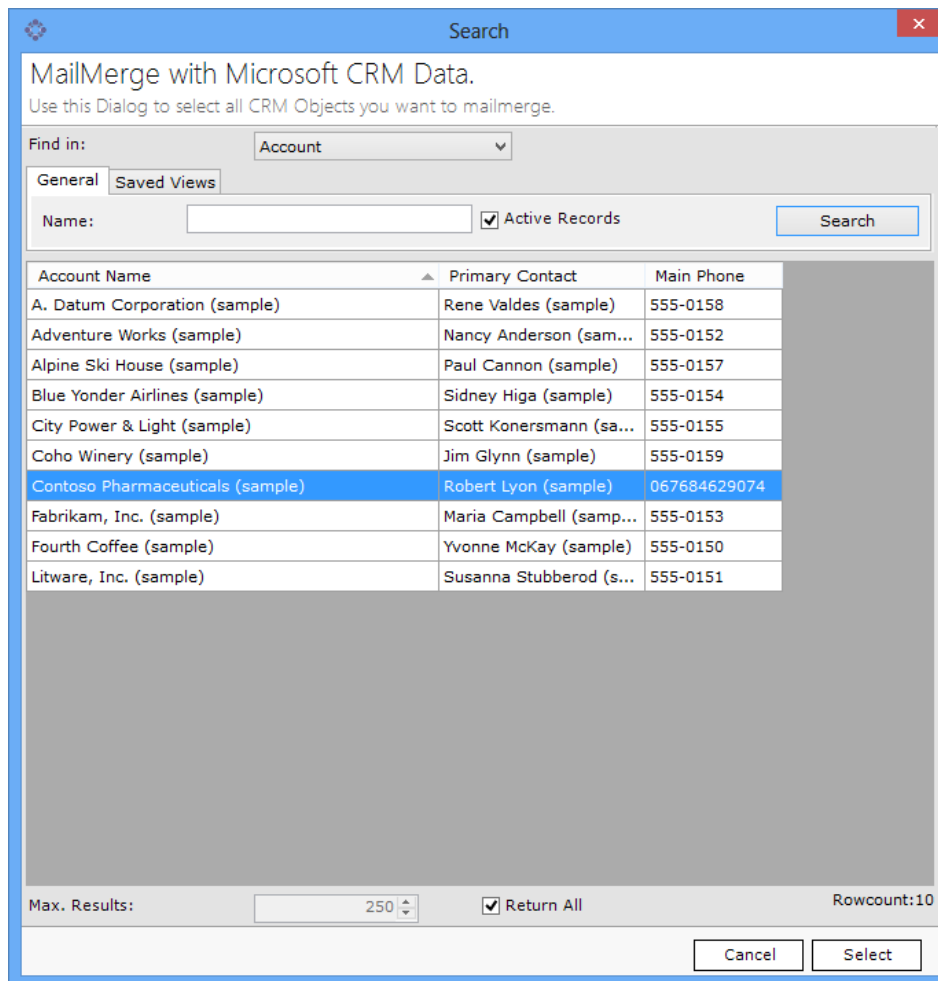
#### Step 1: Choose CRM Data

Now we have to select the contacts we want to create a letter for. Therefore, we proceed with a click on "Choose CRM data"



## Step 2: Search Window

The search window appears:



MailMerge with Microsoft CRM Data.  
Use this Dialog to select all CRM Objects you want to mailmerge.

Find in: Account

General Saved Views

Name:   Active Records

| Account Name                     | Primary Contact         | Main Phone   |
|----------------------------------|-------------------------|--------------|
| A. Datum Corporation (sample)    | Rene Valdes (sample)    | 555-0158     |
| Adventure Works (sample)         | Nancy Anderson (sam...  | 555-0152     |
| Alpine Ski House (sample)        | Paul Cannon (sample)    | 555-0157     |
| Blue Yonder Airlines (sample)    | Sidney Higa (sample)    | 555-0154     |
| City Power & Light (sample)      | Scott Konersmann (sa... | 555-0155     |
| Coho Winery (sample)             | Jim Glynn (sample)      | 555-0159     |
| Contoso Pharmaceuticals (sample) | Robert Lyon (sample)    | 067684629074 |
| Fabrikam, Inc. (sample)          | Maria Campbell (samp... | 555-0153     |
| Fourth Coffee (sample)           | Yvonne McKay (sample)   | 555-0150     |
| Litware, Inc. (sample)           | Susanna Stubberod (s... | 555-0151     |

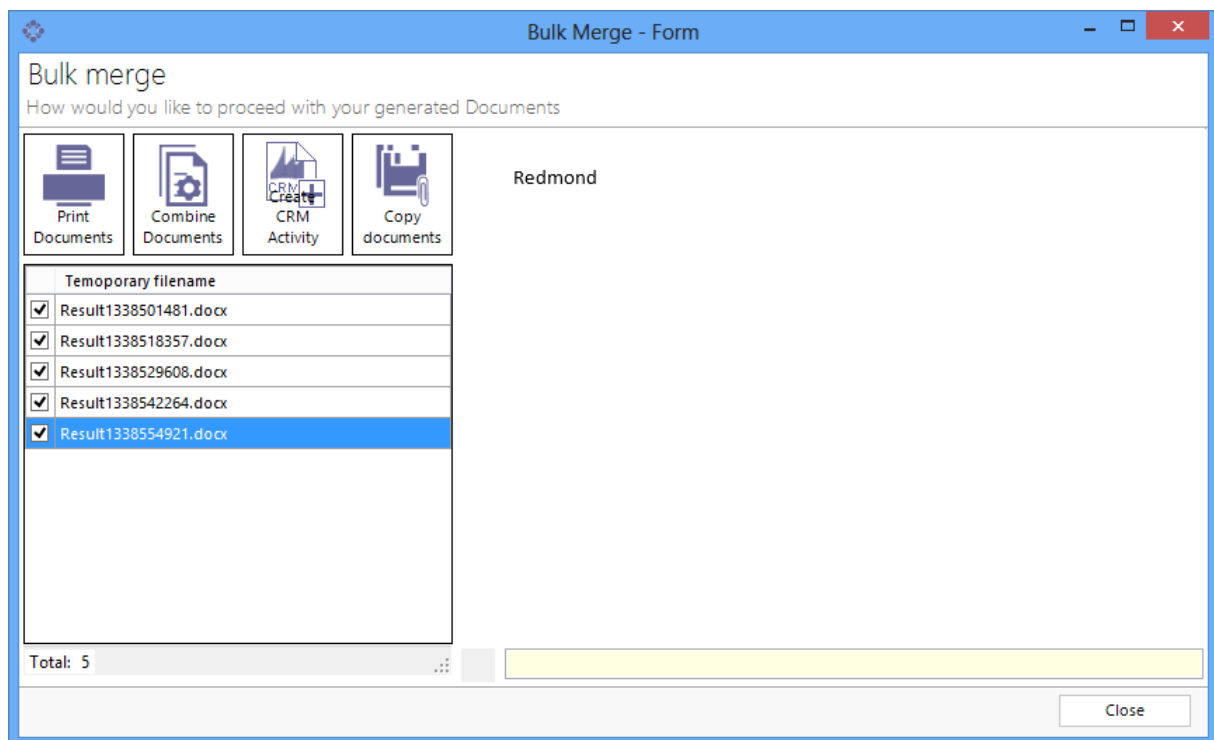
Max. Results: 250  Return All Rowcount:10

## Step 3: Select the records and click on the [Select] button

Once we have found the records we want to merge, we can select the entries and proceed with a click on [Select]

You will see the following dialog. This dialog shows you a list of the generated documents.

At this point, the documents only have a temporary name. This name will be replaced with the "DocumentName" property if this is set in the properties. You can click on the single entries and check the preview on the right side of the dialog. Open and edit the generated documents by double clicking on the item.



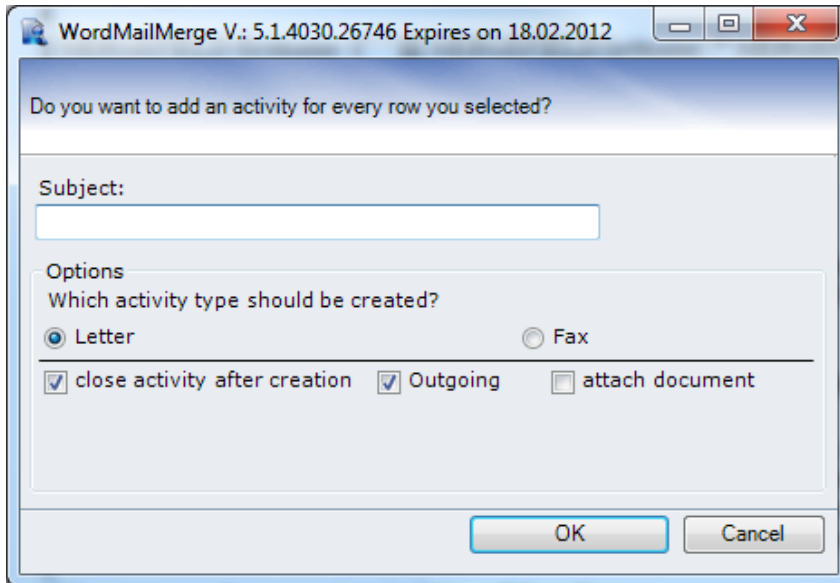
Within this dialog you also have additional features:

- **Print Documents:**  
Sends all the generated documents to your default printer; The printer itself or the settings can be changed within Windows printer settings.
- **Combine Documents:**  
When this option is used, all generated documents will be combined into one big Word-document. This document will be opened after the process has finished.
- **Create CRM Activity:**  
See: Step 6 below
- **Copy documents:**  
You can copy the temporarily generated documents to a location of your choice. During this step, the "DocumentName" property will be applied. In case of name conflicts, the name will be extended with a continuing number.



**Step 4: Click on the [Create CRM Activity]**

We can choose the activity type, the subject and we can specify some further settings and proceed with a click on [ok].

**Step 5: Result**

Within CRM we can see that a new activity has been created for each of the chosen contacts.

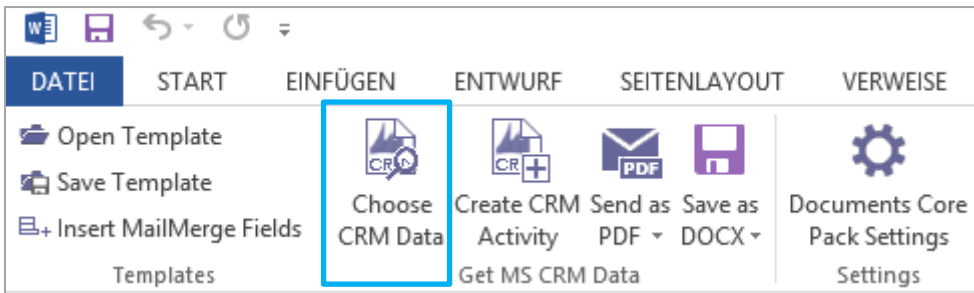
## 2.2.2 "Deprecated Word Standard (.dot)" – Bulk Merge

### 2.2.2.1 Letters with more than one record – Step-by-Step

In our example we want to send a certificate-letter to some contacts.

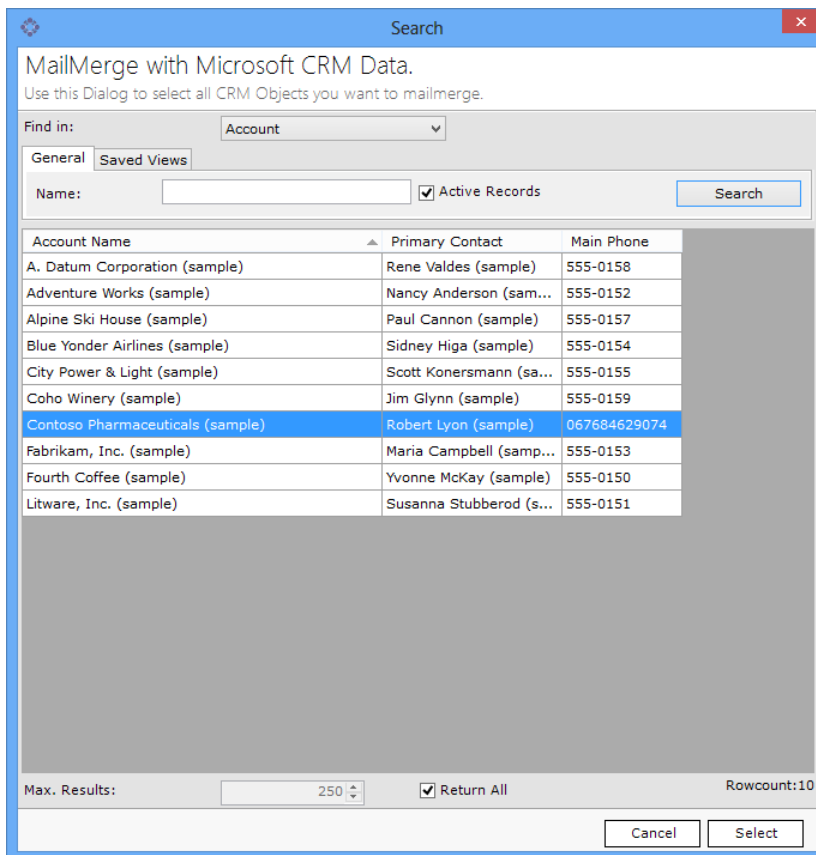
#### Step 1: Choose CRM Data

Now we have to select the contacts we want to create a letter for. Therefore, we proceed with a click on "Choose CRM data"



#### Step 2: Search Window

The search window appears.



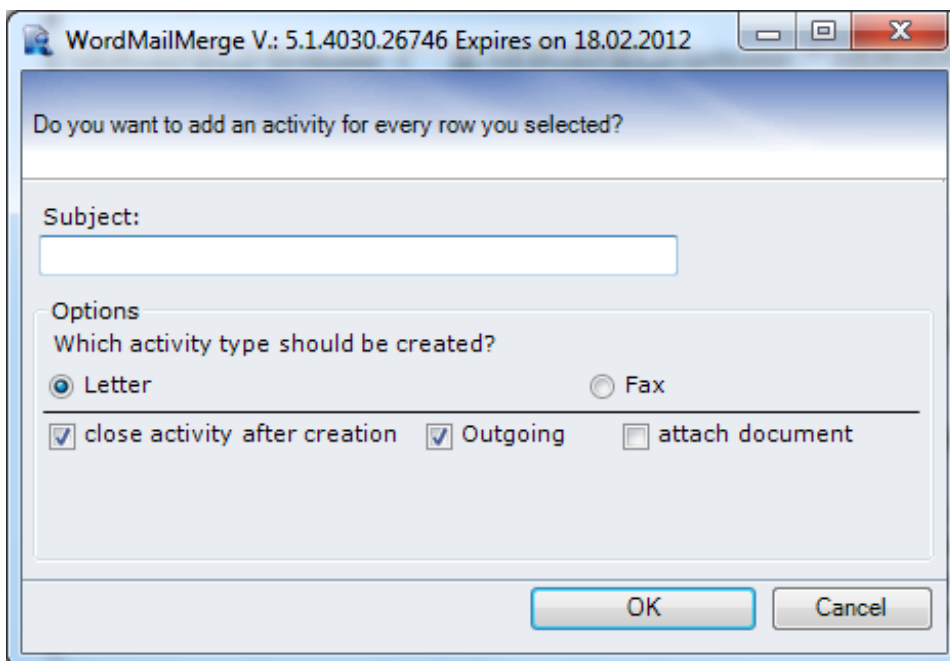
**Step 3: Select the records and click on the [Select] button**

Once we have found the records we want to merge, we can select the entries and proceed with a click on [Select]

The data will be loaded into MS Word. It will not automatically generate documents for each record (as the number of records could be e.g. > 500), but we can generate and write the documents back to CRM via "Create CRM Activity"

**Step 4: Click on the [Create CRM Activity]**

We can choose the activity type, the subject and we can specify some further settings and proceed with a click on [ok].

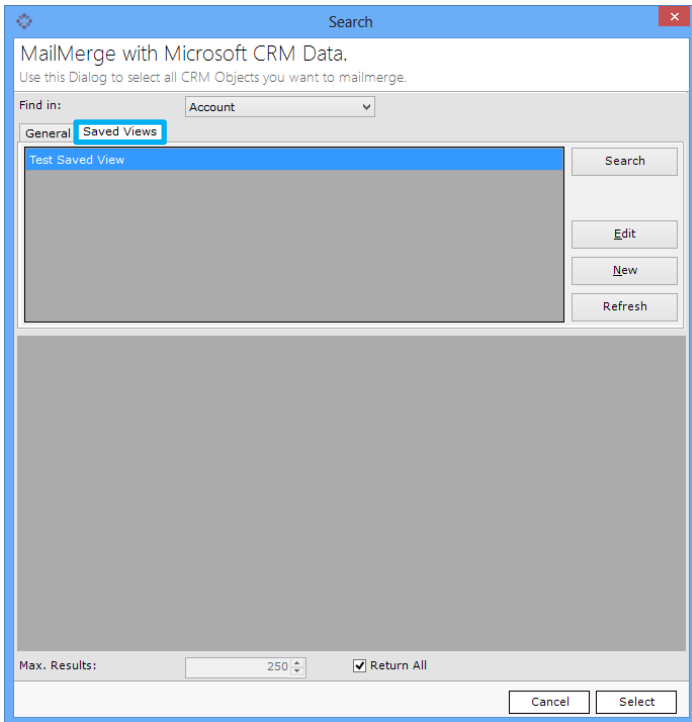
**Step 5: Result**

Within CRM we can see that a new activity has been created for each of the chosen contacts.

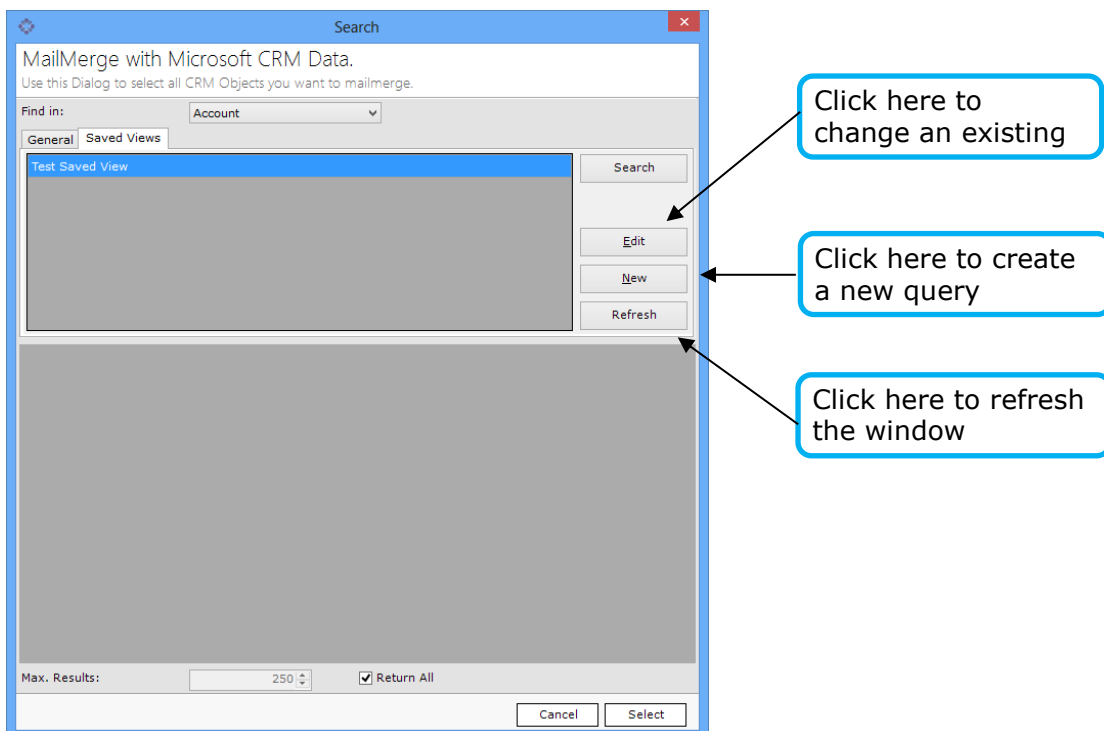
2.2.2.2 Using „Saved Views“ to choose data

**Step 1: Click on [Choose CRM Data]**

By clicking on [Choose CRM Data] in MS Word, the search window will be opened.

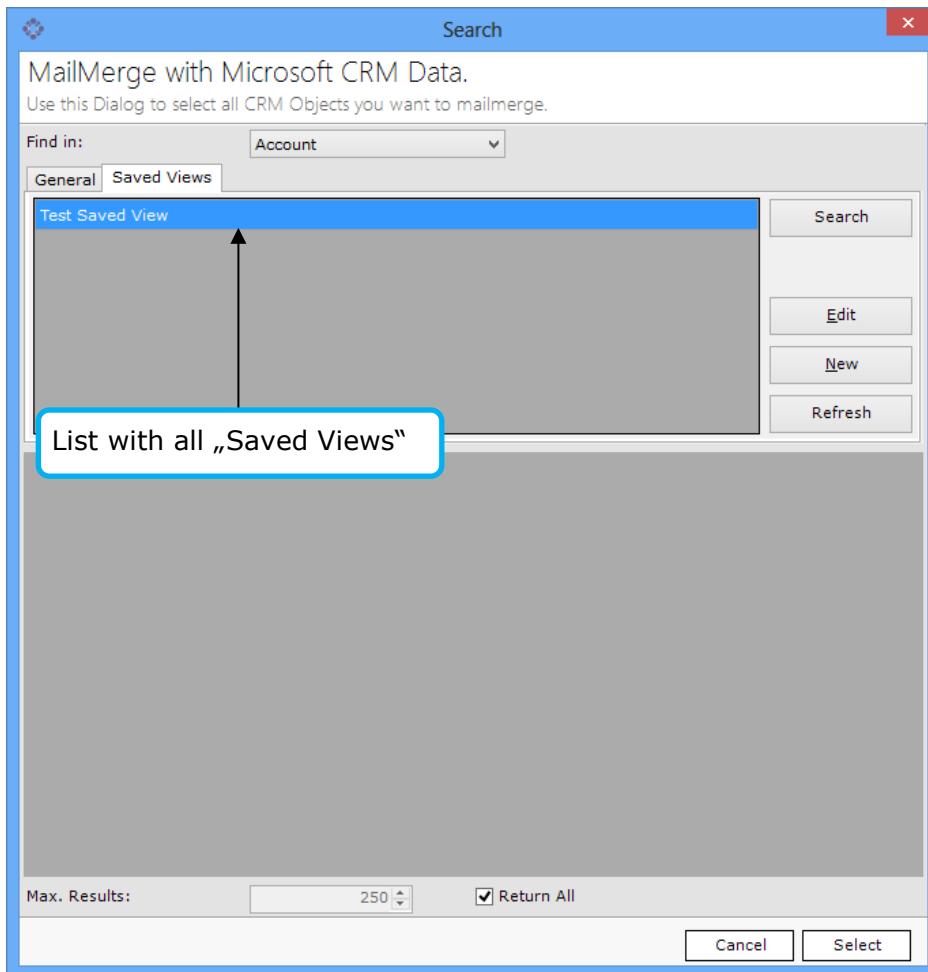


To choose the records by using saved views, we have to change to the register [saved views]. The following window appears:



## Step 2: Choosing the view

We can proceed and open the records retrieved by this view with a double click on the view.



The results will appear. We can choose the records we want to use and go ahead by clicking on the [Choose] button. DCP will now load the data to Word and we can e.g. "Create CRM Activities".

## 3 DocumentsCorePack-Templates

DocumentsCorePack – templates include predefined fields, so-called mail merge fields. These are references to attributes in the CRM-system (name of company, address, primary contact, mobile phone number...).

It is possible to create templates for each MS CRM – entity (contacts, companies...). The created templates can then be used by each user for generating documents.

For example:

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

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

We recommend you the new Office Open XML (.docx) Standard.

Docx Templates are based on an Open XML standard and are not limited to only one data source. Due that fact the Docx Content Controls are more fixable and much more efficient as the old Mail Merge fields. You can resolve any relationships between the entities, the following descriptions offers you the possibility to learn how to do this.

### 3.1 Office Open XML (.docx)

In the following Chapter we show you how to use Documents Core Pack 2013 in conjunction with Microsoft Office Word, and how to handle and use DCP Templates.

#### 3.1.1 Creating Office Open XML (.docx) Template

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

This chapter contains a step-by-step description about how to create a quote-with-grouping template. This means that the quote-products are grouped by the value of a specific CRM-attribute (e.g. subject) which is quite a common requirement.

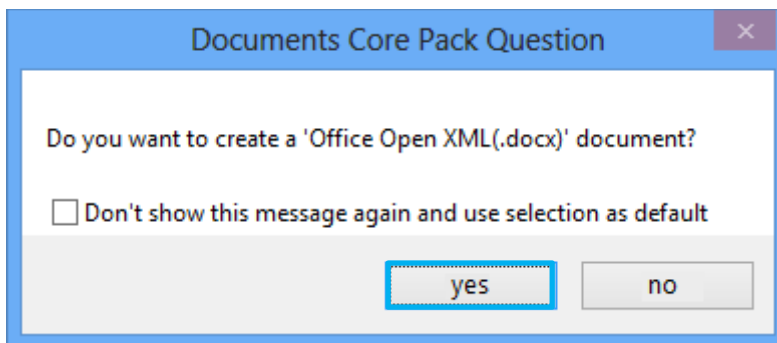
---

**Step 1: Create template layout**

First, we need to create the basic layout of the template.

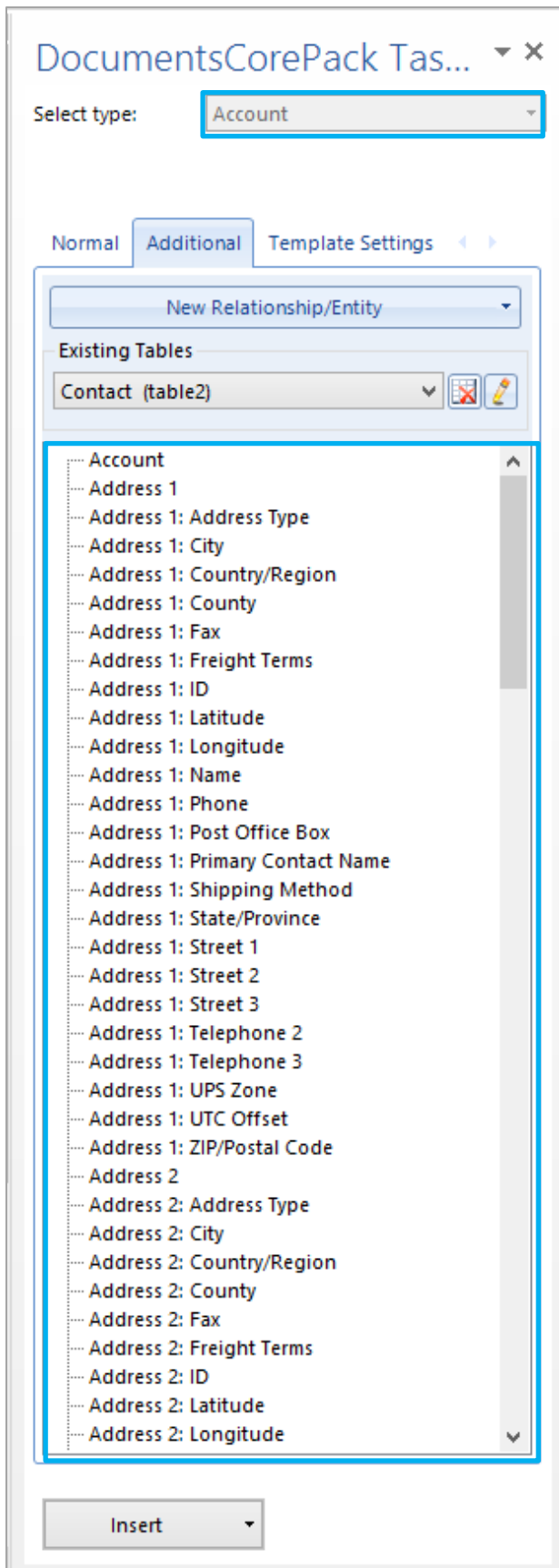
In our case it contains a header with information about the customer (address, contact-information...), a list of products grouped by subject and a footer.

As described in the previous chapter, we can do this by simply opening the "Insert Mailmerge Fields" dialogue. The following message will appear:



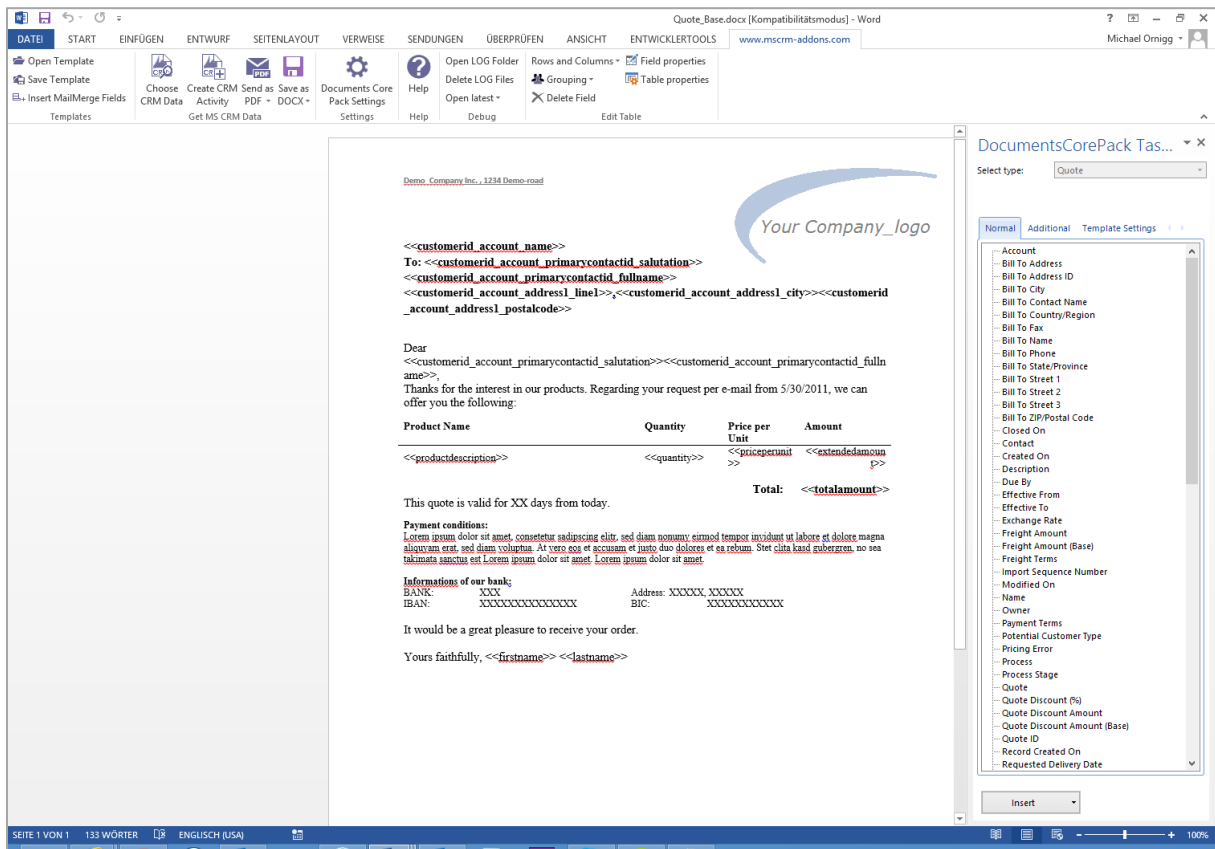
Press [Yes] to create a 'Office Open XML (.docx)' document. The DocumentsCorePack Task Pane appears. Now we can insert the fields we want. All N:1 relations are resolved automatically. Therefore, we can insert fields from the potential customer, owner, etc. as well

First, we have to choose "Quote" in the "Select type"-dropdown-box.





After inserting some fields and pictures, our basic quote template is ready and looks like this:

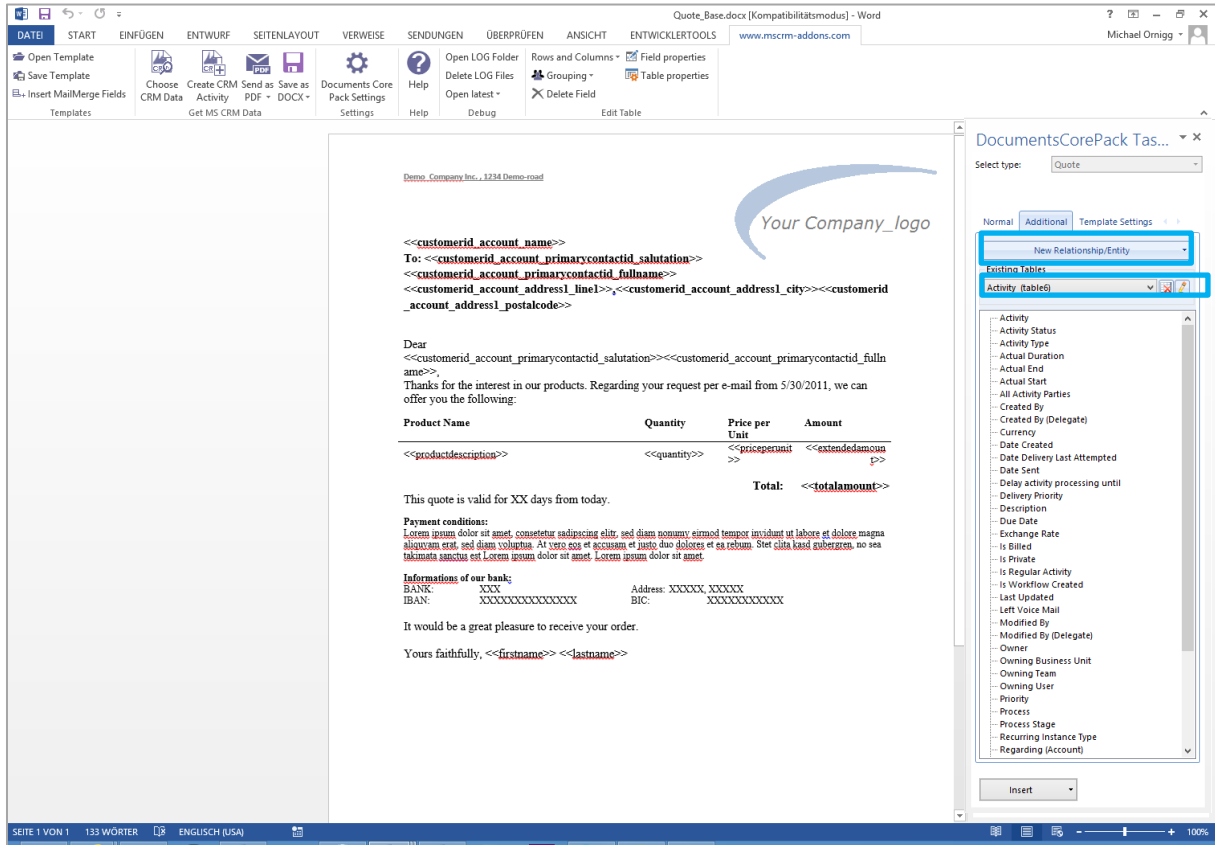


The XXXX – part marks the place where we want to add the list of quote-products including a total-sum field at the end.

When using standard templates, we would now have to add if-statements and switch the directory type, etc. With Office Open XML, this is a lot easier.

## Step 2: Add line-item relationship

First, we need to resolve the quote-quoteproduct relationship. Therefore, we need to click on the [Additional]-tab in the DocumentsCorePack Task Pane.



The „Additional“ section allows to resolve any relation/entity within CRM and brings up a list of all attributes from the related entities so that they can be used within the document too.

When hitting the "New Relationship/Entity" button, following window appears:

**Add New Relationship...**  
With this functionality you can add new relationships/tables to this template.

**Add one of the following predefined relationships for this entity.**

**All Contacts**  
Insert a table of contacts associated with this account

**All Cases**  
Insert a table of cases associated with this account

**All Opportunities**  
Insert a table of opportunities associated with this account

**All Quotes**  
Insert a table of quotes associated with this account

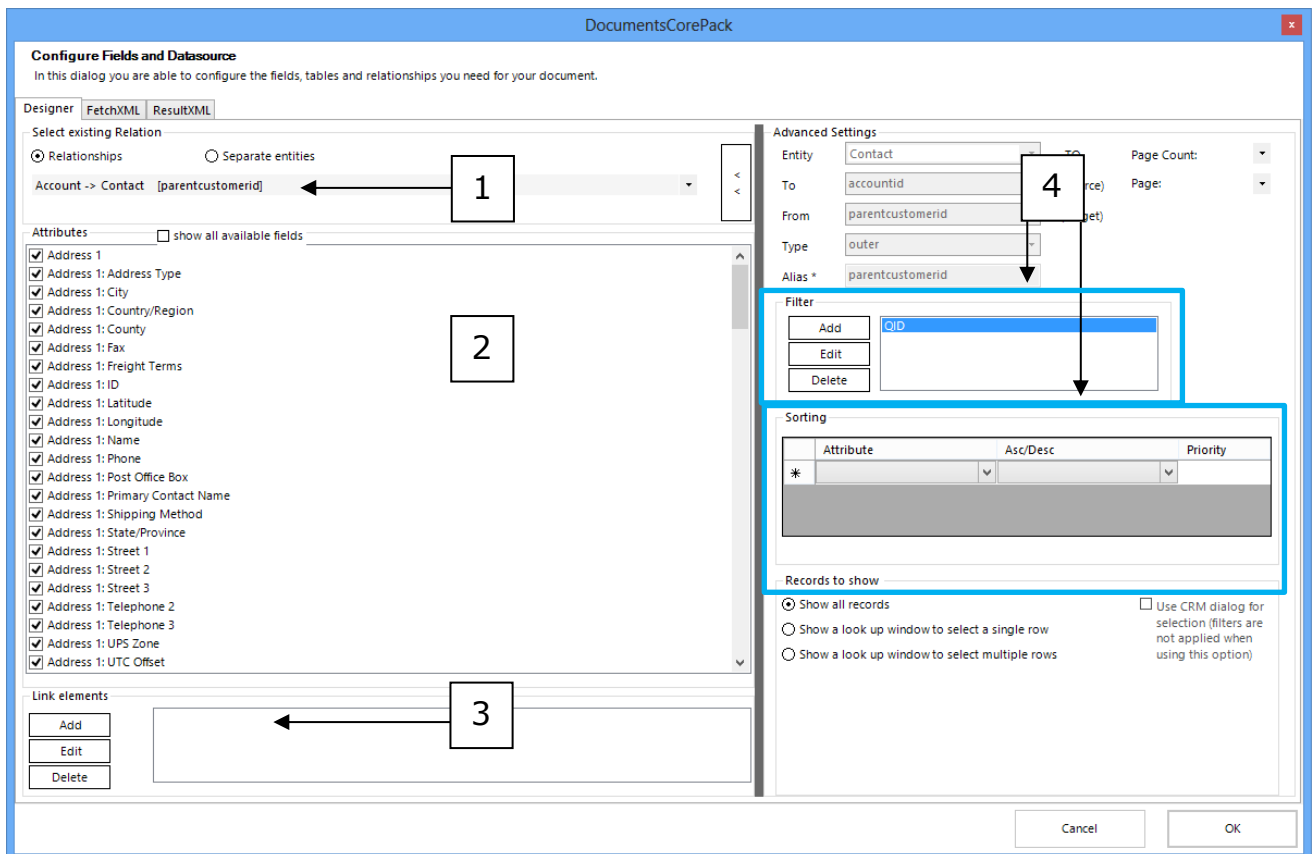
**All Invoices**  
Insert a table of invoices associated with this account

**User Info**  
Use all the fields from the logged on user in your document

**All Activities**  
Insert table of activities attached to this account

DocumentsCorePack provides already predefined relationships for certain entities, which you can use straight away.

Choose "Add New Relationship..." to move on.

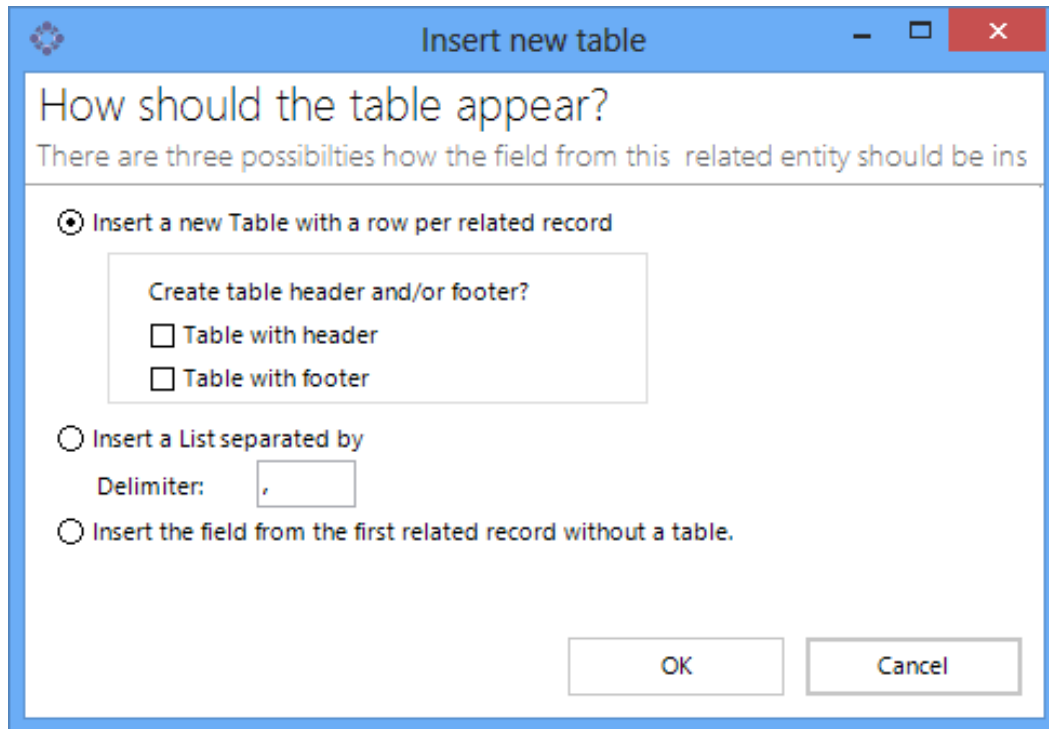


- Here we can choose a relationship(1) (Quote->Quote Product in our example) and select the fields that should be available for insertion (2).
- At the bottom we can add further link-elements in the same way. E.g QuoteProduct->Product (3).
- If necessary we could also define a sort-order for the quote-products or specify a filter value (4).
- That's basically all we need. We can finish this procedure with a click on [OK].
- We can resolve new relationships if there is no predefined ones.

### Step 3: Inserting table

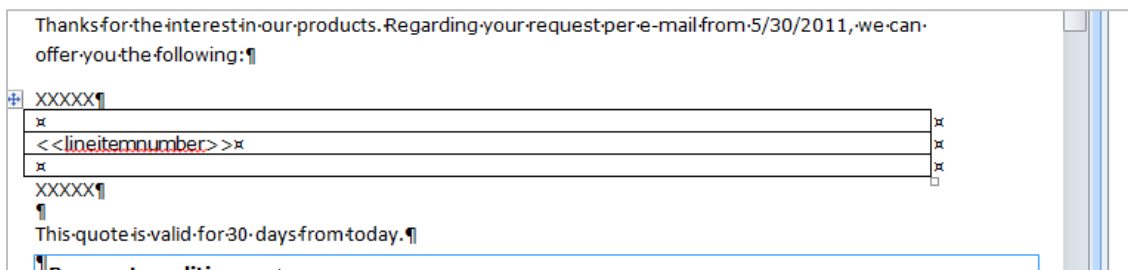
When getting back to the template, we can see that the attributes chosen at step 2 are now listed in the task-pane.

The procedure of inserting a table of items is completely automated, so we just need to set the cursor to the position where we want to add the table and double click on one of those attributes. The following message will appear:



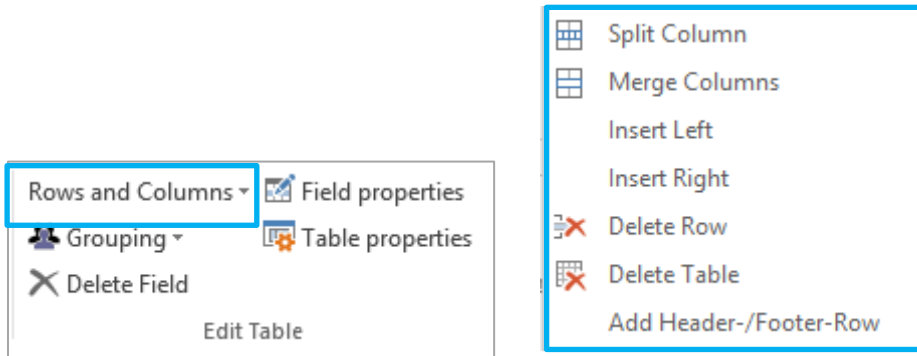
So we can choose whether we want to add a table header or not. In our case we choose header + footer and proceed with a click on [OK].

As a result, the table will be inserted at the determined position:



**Step 4: Formatting the table**

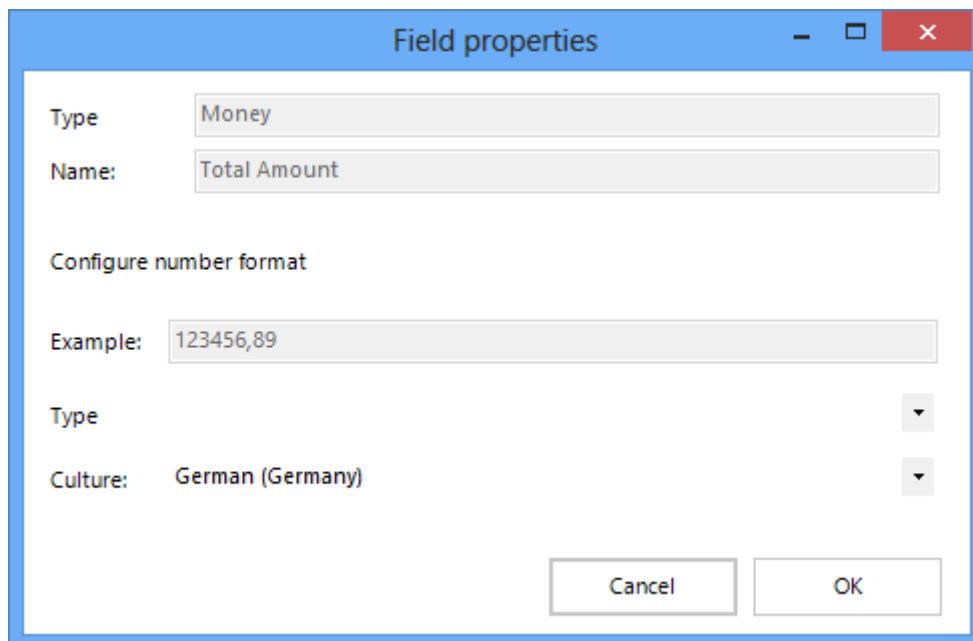
Once the table is inserted we can add fields like quantity, product-name or even a table header with column-names with the formatting options available in the [www.mscrm-addons.com](http://www.mscrm-addons.com)



Once finished, our table could look like this:

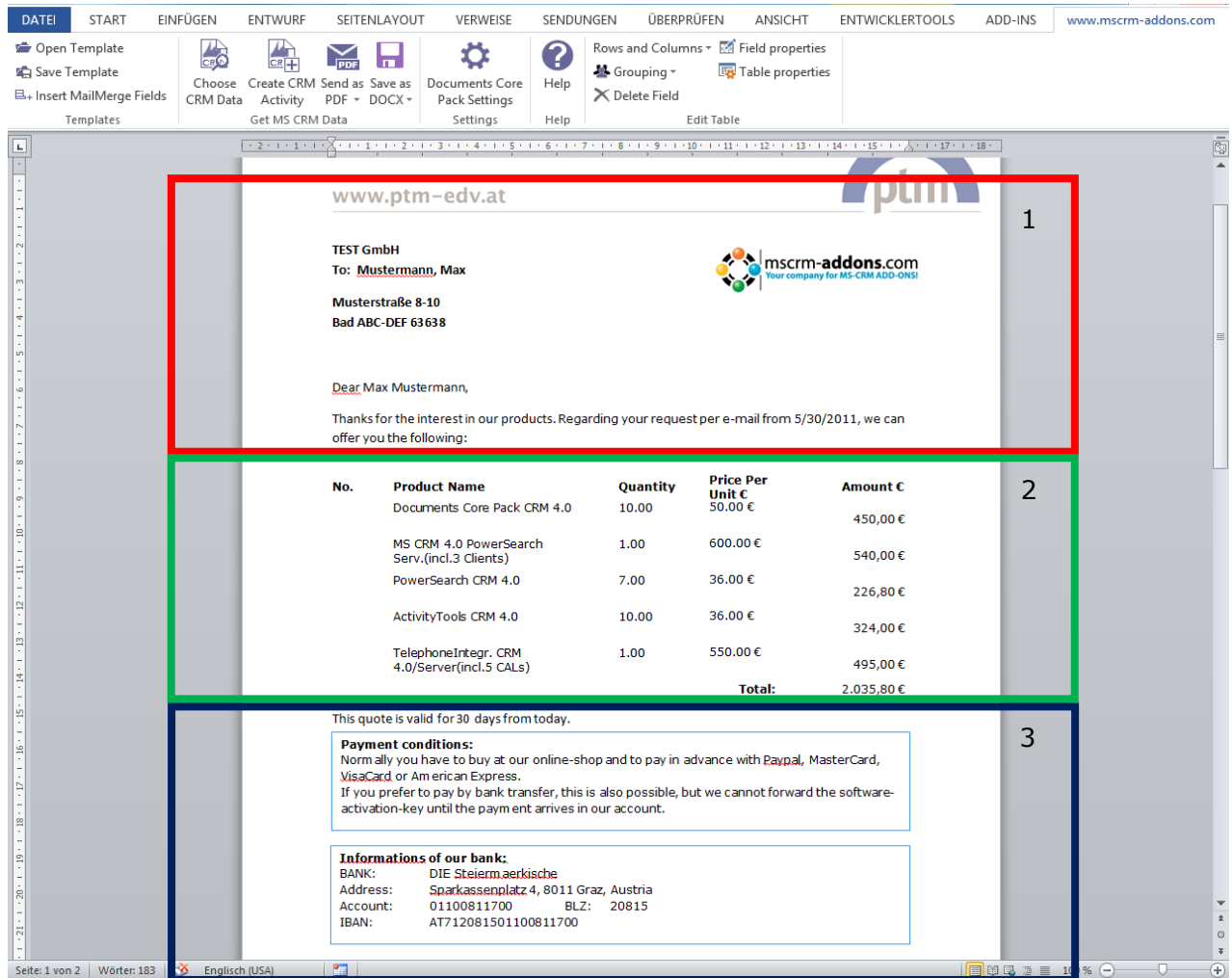
| No.             | Product Name               | Quantity     | Price Per Unit € | Amount €           |
|-----------------|----------------------------|--------------|------------------|--------------------|
| <<lineitemnum>> | <<quoteid_productid_name>> | <<quantity>> | <<priceperunit>> | <<extendedamount>> |
| <b>Total:</b>   |                            |              |                  | <<extendedamount>> |

The "Field properties" allow us to specify e.g. the format of money fields like <<extendedamount>>:



**Step 5: Result**

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



The screenshot shows a software interface for editing a document. The document content is as follows:

**Section 1 (Red border):** Header information including the website [www.ptm-edv.at](http://www.ptm-edv.at), the company name TEST GmbH, recipient information (To: Mustermann, Max), address (Musterstraße 8-10, Bad ABC-DEF 63638), and a personalized greeting (Dear Max Mustermann). It also includes a thank you message and an offer of products.

**Section 2 (Green border):** A table of products and their prices.

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

**Section 3 (Blue border):** Payment conditions and bank information. The payment conditions state that the quote is valid for 30 days and that payment should be made in advance via PayPal, MasterCard, VisaCard, or American Express. Bank information includes: BANK: DIE Steiermärkerische, Address: Sparkassenplatz 4, 8011 Graz, Austria, Account: 01100811700, BLZ: 20815, IBAN: AT712081501100811700.

### 3.1.2 Document/Template Settings

Here we tell you all about the Documents Core Pack 2013 settings and usage. The three main points are

- Document Task Pane Code Pack
- "Additional" - Tab
- "Template Settings" - Tab.

In addition to these main points we will give you accurate instructions for use of the entire pane.

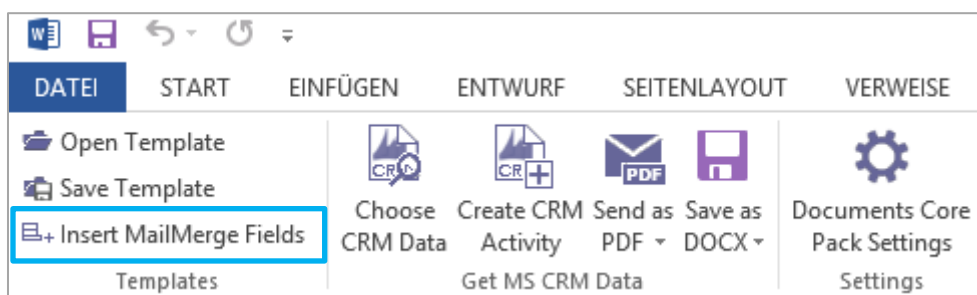
Many photos and additional information make the content easy to understand should you still have questions do not hesitate to contact our support team or take a closer look at our [Blog](#).

#### 3.1.2.1 DocumentsCorePack Task Pane

The Task pane is the main constituent of DocumentsCorePack, via this central component is it possible to do the following things:

- insert Fields
- add Entities
- manage Tables
- configure various settings

The now coming Content statements, Information, Explanations and Step by Step Instructions gives you an insight of the function and scope of functions.



At first the only thing you have to do to access to the Task Pane is click at [Insert MailMerge Fields]

Now the Task Pane appears.



### Task Pane Overview

**Select Type**  
Select an Entity from which you want to insert your fields

The screenshot shows a task pane window titled "DocumentsCorePack Tas...". At the top, there is a "Select type:" dropdown menu with "Account" selected. Below this are three tabs: "Normal", "Additional", and "Template Settings". The "Normal" tab is active, displaying a tree view of fields. The tree view is organized into two main sections: "Account" and "Address 1" (with a sub-section "Address 2"). Under "Account", there are fields like "Account Name", "Account Number", "Account Rating", etc. Under "Address 1", there are fields like "Address 1: Address Type", "Address 1: City", "Address 1: Country/Region", etc. Under "Address 2", there are fields like "Address 2: Address Type", "Address 2: City", "Address 2: Country/Region", etc. At the bottom of the task pane, there is an "Insert" button.

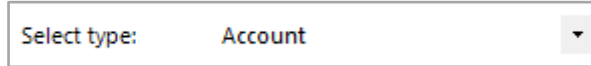
**Tabs**  
The Main Sections of the Task Pane. In this Chapter we just need the "Normal" - Tab

**Tree view**  
Here you can see every Field from your previous selected entity. Just double click to insert.

**Insert Button**  
Click on it to insert the selected Field.  
  
For more information check out the REF Insert button Chapter

### Select entity

In the "Select Entity"-Dropdown every Standard and Custom entity is available.

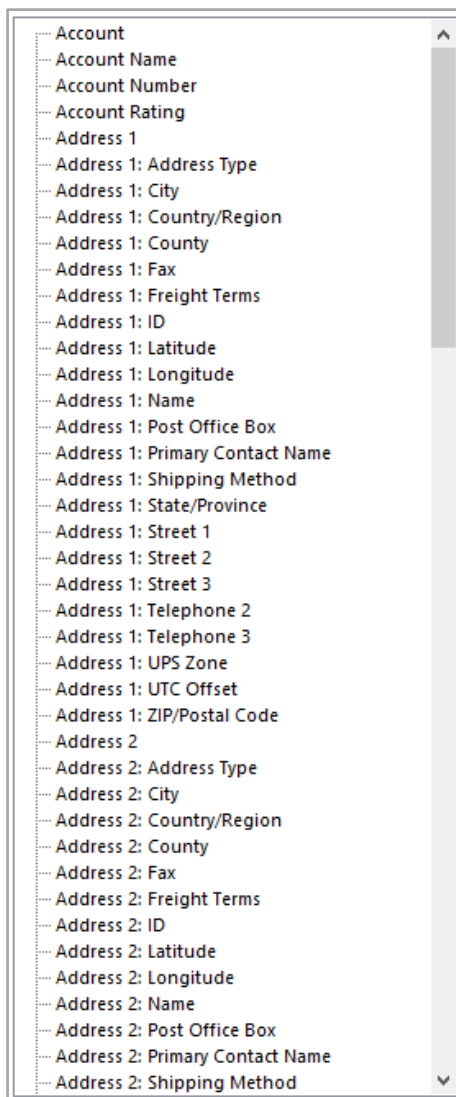


Select type: Account

Just select an entity and every Field will be shown in the Treeview.

### Treeview

See every available Field from your previous selected entity. Double click a Name to insert a Field or select it and click the Insert Button.



- Account
  - Account Name
  - Account Number
  - Account Rating
  - Address 1
    - Address 1: Address Type
    - Address 1: City
    - Address 1: Country/Region
    - Address 1: County
    - Address 1: Fax
    - Address 1: Freight Terms
    - Address 1: ID
    - Address 1: Latitude
    - Address 1: Longitude
    - Address 1: Name
    - Address 1: Post Office Box
    - Address 1: Primary Contact Name
    - Address 1: Shipping Method
    - Address 1: State/Province
    - Address 1: Street 1
    - Address 1: Street 2
    - Address 1: Street 3
    - Address 1: Telephone 2
    - Address 1: Telephone 3
    - Address 1: UPS Zone
    - Address 1: UTC Offset
    - Address 1: ZIP/Postal Code
  - Address 2
    - Address 2: Address Type
    - Address 2: City
    - Address 2: Country/Region
    - Address 2: County
    - Address 2: Fax
    - Address 2: Freight Terms
    - Address 2: ID
    - Address 2: Latitude
    - Address 2: Longitude
    - Address 2: Name
    - Address 2: Post Office Box
    - Address 2: Primary Contact Name
    - Address 2: Shipping Method

### 3.1.2.2 "Additional"-Tab

The Additional Tab is the control Center to manage all Additional Entities and Relationships. It is necessary to distinguish between predefined standard Entities and custom entities.

- Predefined Entities

Each entity has already predefined additional Entities resolved, so it is possible for everybody to use fields from the related entities.

As Example if you select Account as Main Entity for your Template you have the following additional entities predefined:

- All Contacts
- All Cases
- All Opportunities
- All Quotes
- All Invoices
- User Info
- All Activities

So as you can see a large number of entities has already been prepared for you.

- Custom Entities

DCP offers you the possibility to resolve additional custom entities, with this Feature it is possible to get access to nearly every Field from every Entity in your CRM regardless of your "Base-Entity".

For more information, please read [chapter 5](#) "Administrator Section / High Qualified User".

**"Additional" - Tab**

**New Relationship**

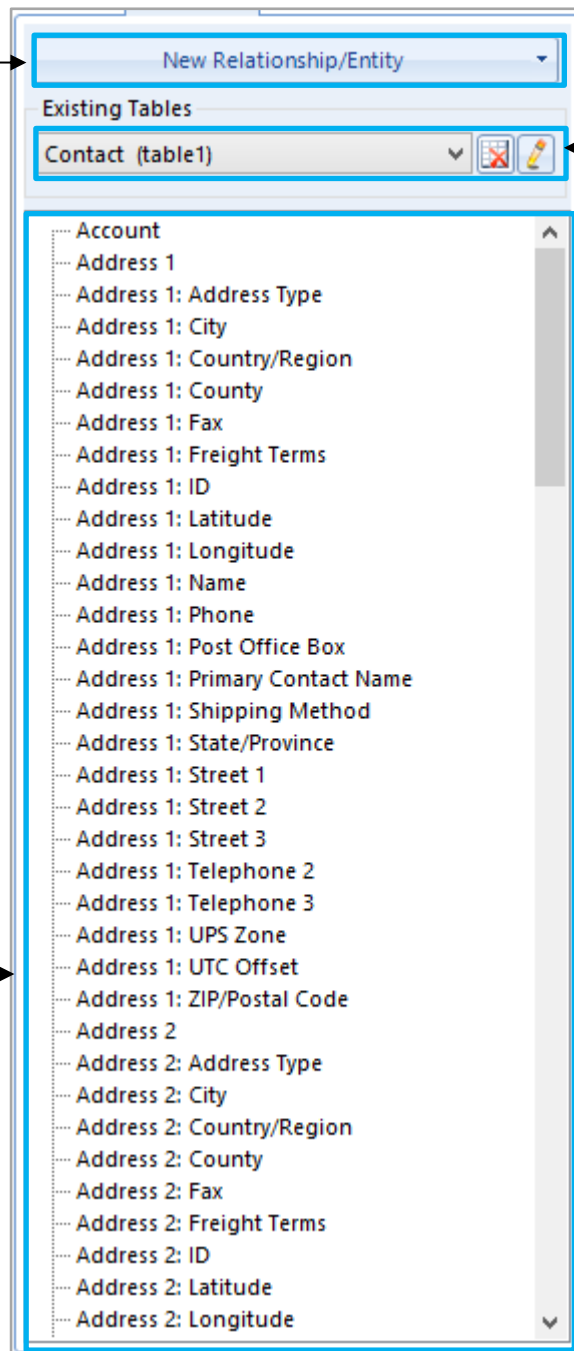
Click on it to see the already predefined additional Entities or to resolve a new one

**Existing Tables**

See the List of all resolved entities and with the Buttons it is possible to delete or edit these

**Additional Tree**

Here you can see every Field from your selected additional entity.

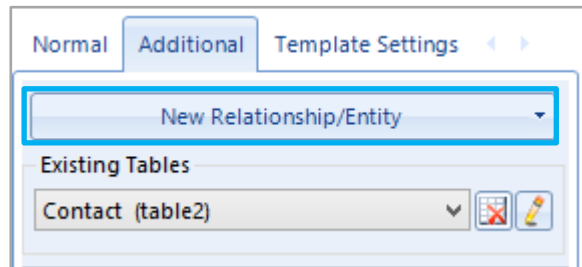


### 3.1.2.2.1 Add a new Entity

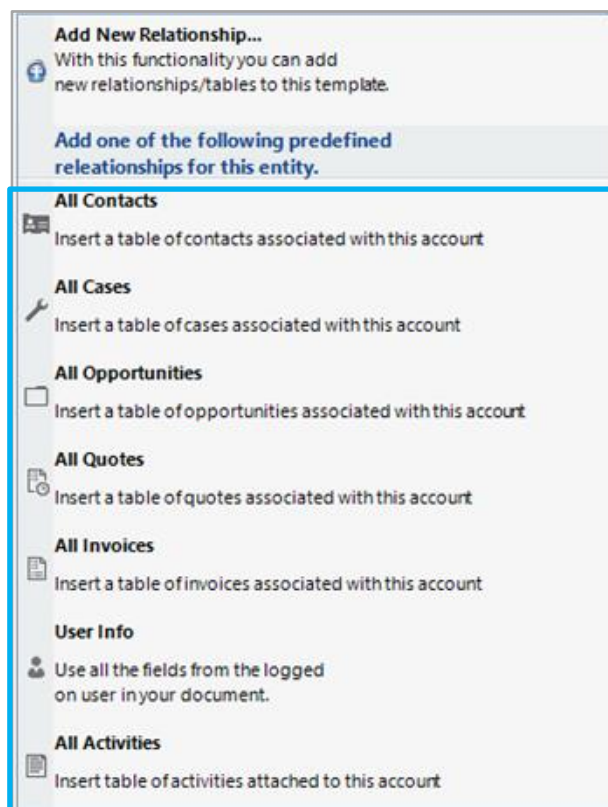
In this Part we introduce you how to resolve a predefined additional Entity. To do this just follow the upcoming Steps.

#### Step1: Click [New Relationship/Entity]

Click the Button in the marked section.



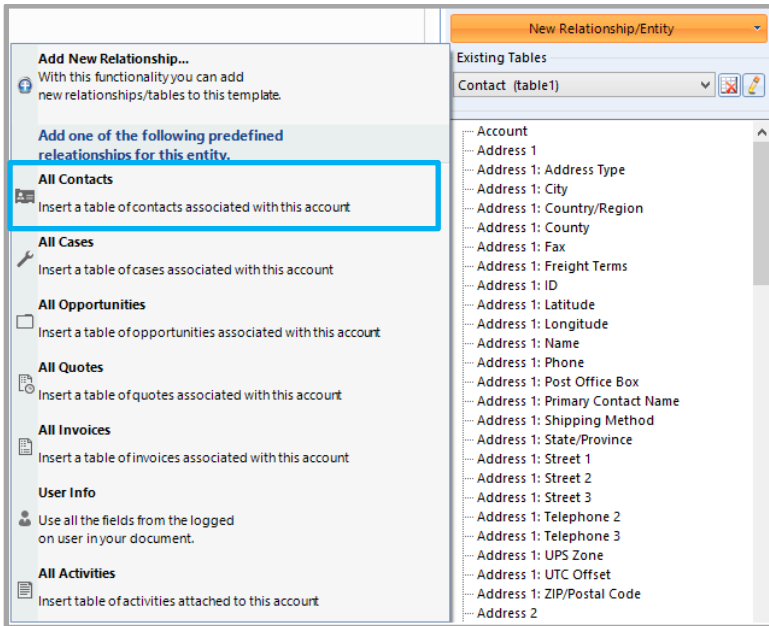
The following Message appear ...



### Step 2: Select an Entity

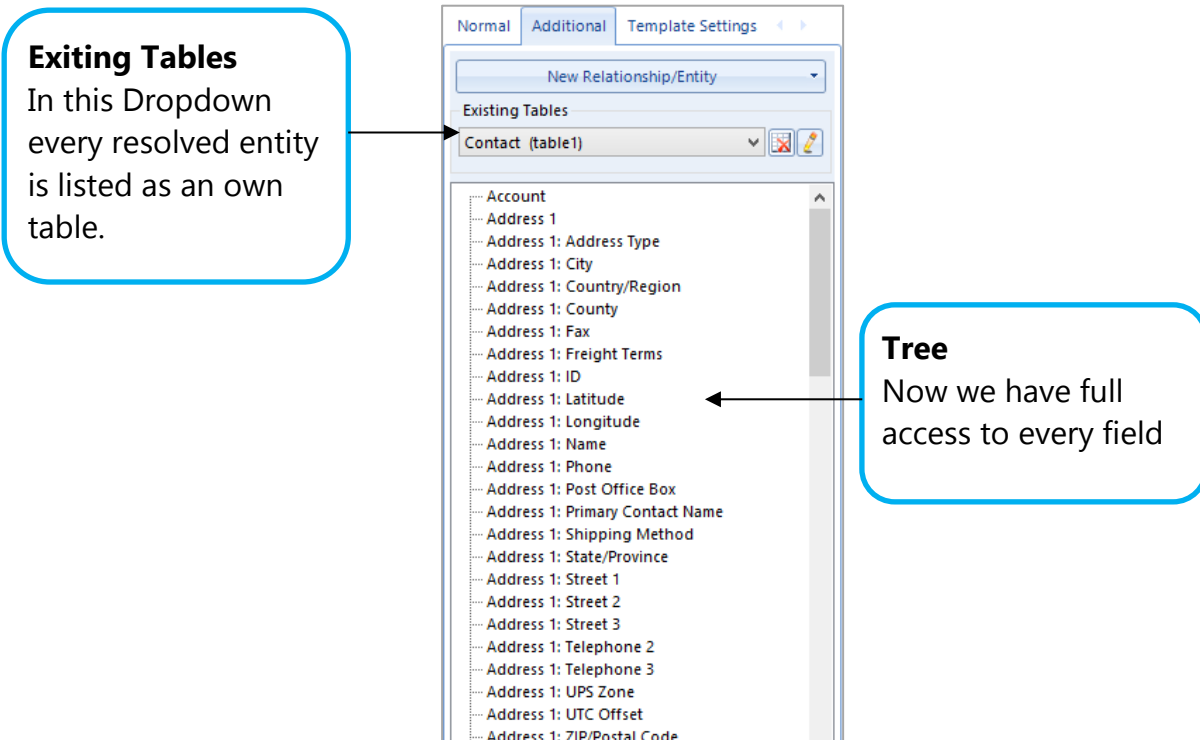
The marked Area includes all predefined Relationships, now you have to select one of those. If you found the Entity you want click on it.

In our Case we clicked on All Contacts, to get access to the fields from Contact Entity.



### Step 3: The Result

Now all fields are added to our Treeview and now we can insert the field we want to.




3.1.2.2.2 Manage Tables

After adding an additional Entity you can manage them in the marked area.

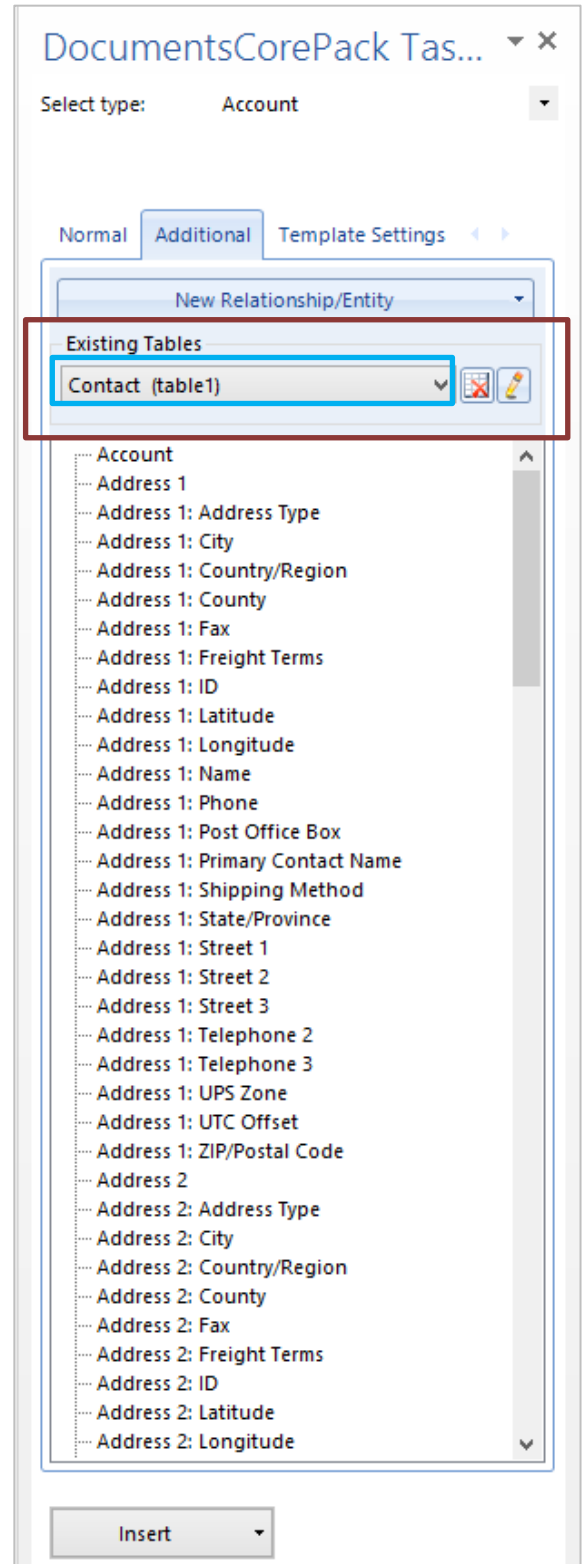
A click on the Table-Dropdown displays a List of all resolved Entities. So it is possible to switch between all Lists of Fields.

The Delete Button 

With the delete Button you the possibility to delete the Relationship and to delete all inserted Tables from this Entity too.

The Edit Button 

This button allows you to edit the existing entity, for more details click here. [REF 5.3](#)

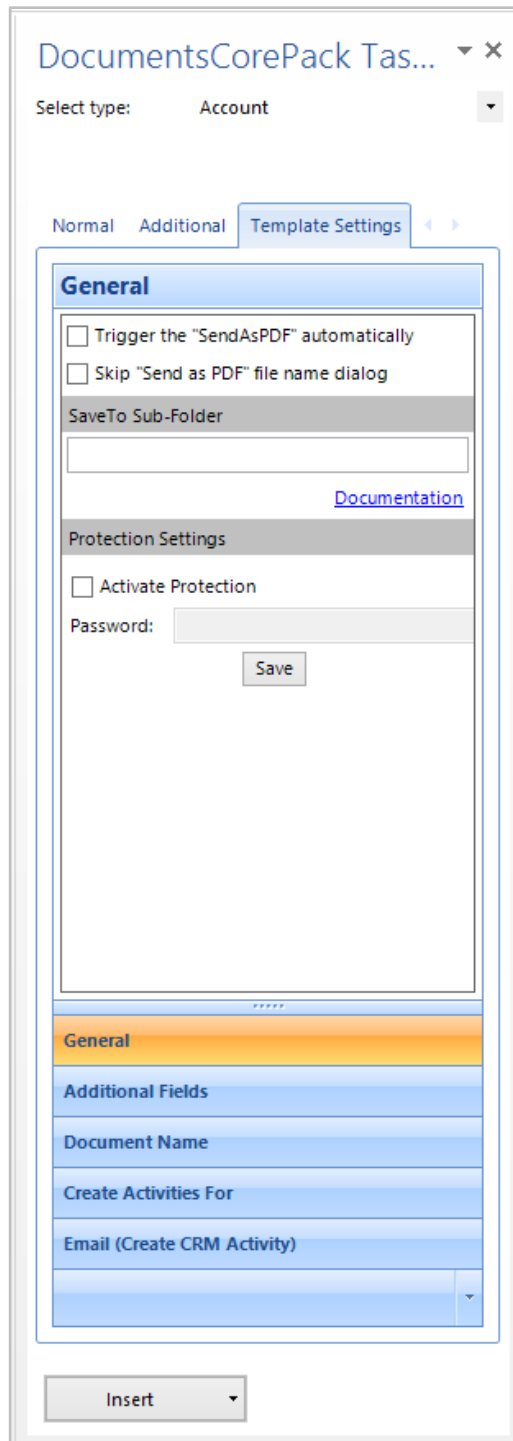


### 3.1.2.3 "Template Settings" – Tab

The "Template Settings" – tab are an easy way to use all necessary Settings and Options for DCP. With this multifunctional Toolbar have you a simple and easy access to all options of the template at one central point

Due to the good restructuring the "Template Settings" – Tab is jointed into 4 sections.

- General
- Additional Fields
- Document Name
- Email
- Create Activities For
- Email



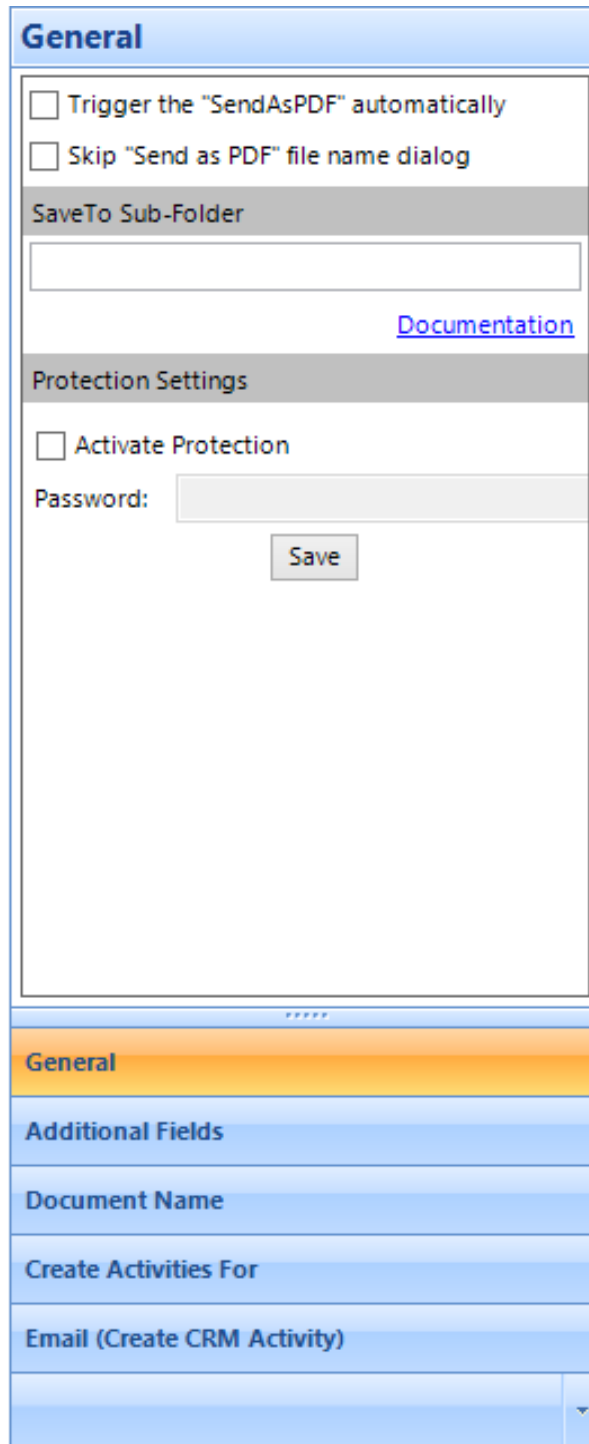


3.1.2.3.1 "General" - Tab

### General

Functions:

- General
- SaveTo Sub-Folder
- Protection Settings



**General**

Trigger the "SendAsPDF" automatically

Skip "Send as PDF" file name dialog

SaveTo Sub-Folder

[Documentation](#)

Protection Settings

Activate Protection

Password:

Save

\*\*\*\*\*

**General**

Additional Fields

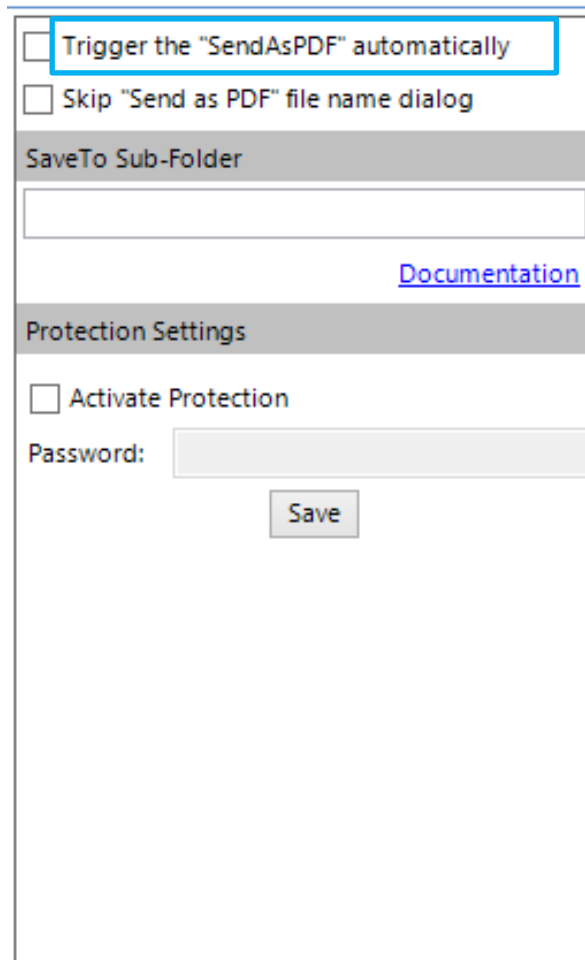
Document Name

Create Activities For

Email (Create CRM Activity)

### Trigger the "SendAsPDF" automatically

If this checkbox is checked it allows you to automatically send the document as PDF without pressing any Button. In Case you press the [Generate Document] Button in you MSCRM and you don't want to always manually press [SendAsPDF] this is the perfect feature for you. After checking this Option every step beyond the [Generate Document] Button will be automatically executed.



Trigger the "SendAsPDF" automatically

Skip "Send as PDF" file name dialog

SaveTo Sub-Folder

[Documentation](#)

Protection Settings

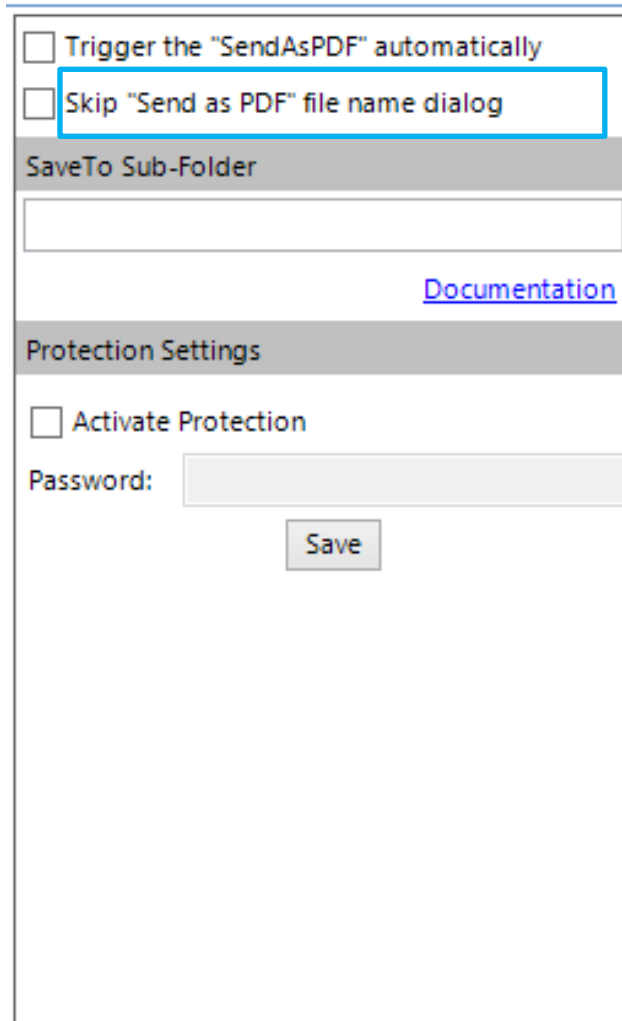
Activate Protection

Password:

Save

### Skip the "SendAsPDF Name" Dialog

If this checkbox is checked it allows you to automatically skip the "file name" - dialog. In Case you press [SendAsPDF] you always have to enter a File Name, but with this Feature it is not necessary. After checking this Option it proceed automatically without asking for a File Name.



Trigger the "SendAsPDF" automatically

Skip "Send as PDF" file name dialog

SaveTo Sub-Folder

[Documentation](#)

Protection Settings

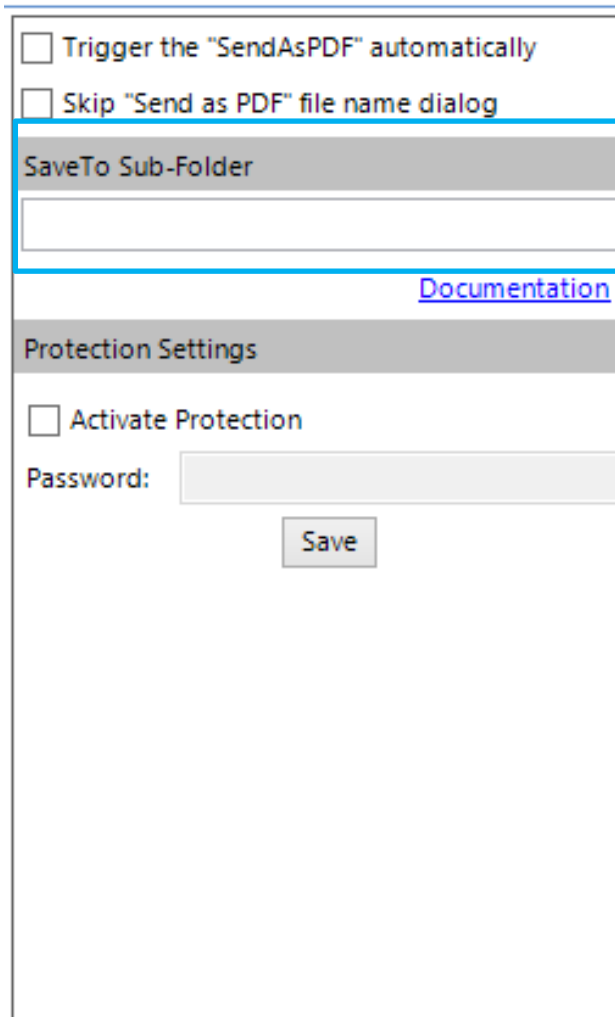
Activate Protection

Password:

Save

### Save To Sub-Folder

This setting predefines the name of the subfolder generated with this template. With this setting it is possible to save the generated document in a subfolder. It is possible to use data from Fields out of CRM to be part of the subfolder name.

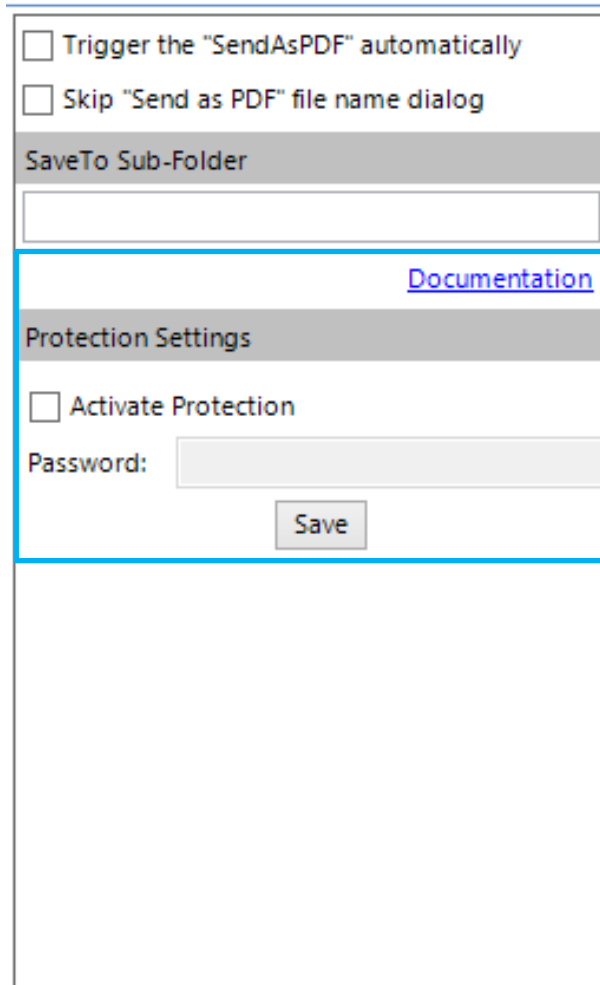


That gives you the possible to generate the subfoldername dynamically, based on constant characters and/or values of fields . Constant characters have to be in single quotes. To use field values in the DocumentName you have to write the fieldname ( schemaname ) surrounded by << and >>. Some examples:

| SaveTo Sub-Folder                   | possible Subfolder results |
|-------------------------------------|----------------------------|
| 'quote-' + <<quotenumber>>.pos(4,5) | quote-12345                |
| 'invoices'                          | invoices                   |

### Protection Settings

The Protection-Setting is a very powerful Option in DCP  
It enables the possibility to Lock your whole Document and arrange a Password.



Trigger the "SendAsPDF" automatically

Skip "Send as PDF" file name dialog

SaveTo Sub-Folder

[Documentation](#)

Protection Settings

Activate Protection

Password:

Save

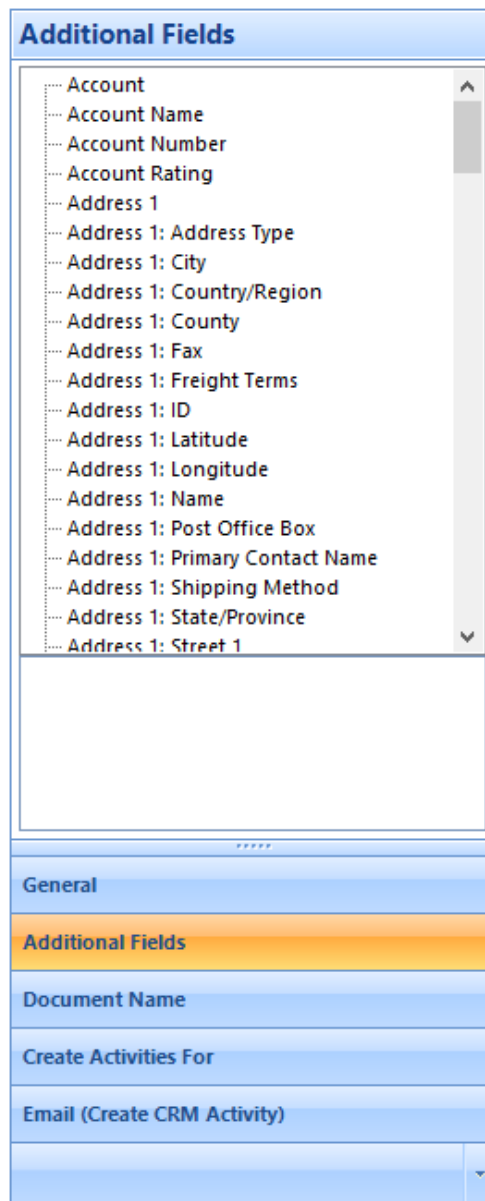
3.1.2.3.2 "Additional Fields " - Tab

Additional Field will be needed to read out additional fields (attributes) which are not defined in the document this means that those fields are loaded into the template automatically. This is very helpful e.g to send emails via DocumentsCorePack and you don't want the email address to be shown on the template.

**NOTE:** for the user it is deprecated it is only internally in use!

Functions:

- Add Fields to the Fetch without being in the Document

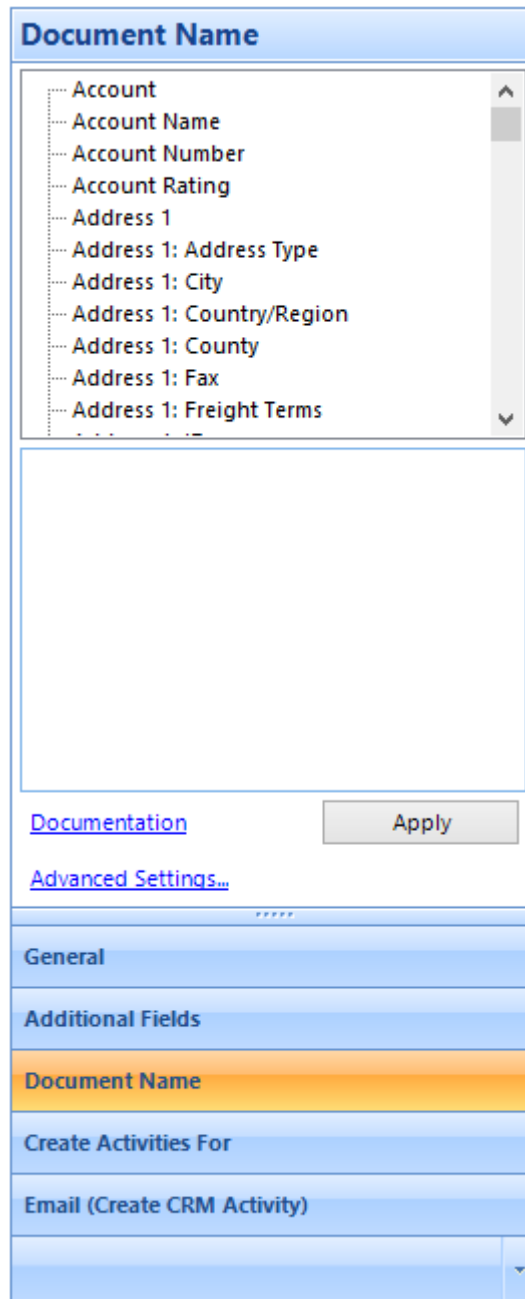


3.1.2.3.3 "Document Name" - Tab

**General**

Functions:

- Name Settings
- Advanced Settings



**Document Name**

- Account
- Account Name
- Account Number
- Account Rating
- Address 1
- Address 1: Address Type
- Address 1: City
- Address 1: Country/Region
- Address 1: County
- Address 1: Fax
- Address 1: Freight Terms

[Documentation](#)

[Advanced Settings...](#)

\*\*\*\*\*

**General**

**Additional Fields**

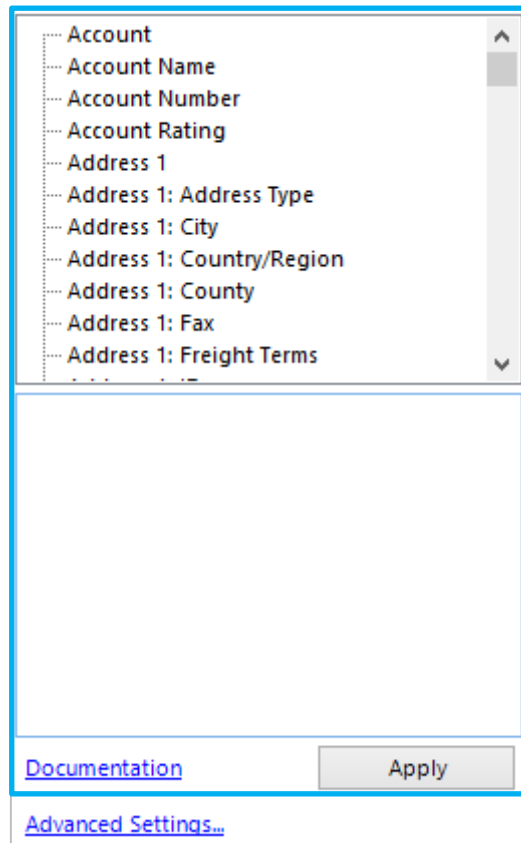
**Document Name**

**Create Activities For**

**Email (Create CRM Activity)**

### Name Settings

This setting predefines the name of the documents generated with this template. It is possible to use data from Fields out of CRM to be part of the document name.



With this it is possible to generate the document name dynamically, based on constant characters and/or values of fields. Constant characters have to be in single quotes. To use field values in the DocumentName you have to write the fieldname ( schemaname ) surrounded by << and >>. Some examples:

| DocumentName                                      | possible DocumentName results |
|---|-------------------------------|
| 'quote-' + <<quotenumber>>.pos(4,5)               | quote-12345                   |
| <<customerid_account_name>>+'-' + <<quotenumber>> | TestCompany-QUO-12345-KWKJQ6  |
|   |                               |

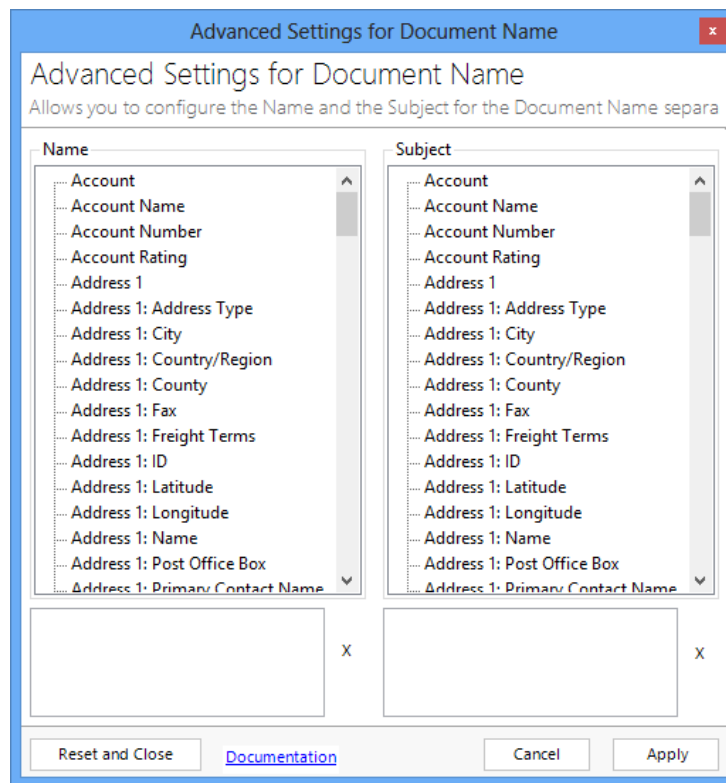


## The Advanced Settings

The new Settings of DocumentsCorePack now allows you to configure the Name and the Subject for the Document Name separately.



Click on [Advanced Settings] and the following window appears



Choose a template for "Name" to define the documents name and a separate "Subject" name for your document. You can add additional information e.g. by typing 'account number:' + <<accountnumber>>

The possible result appears as follows:

account number: 18953

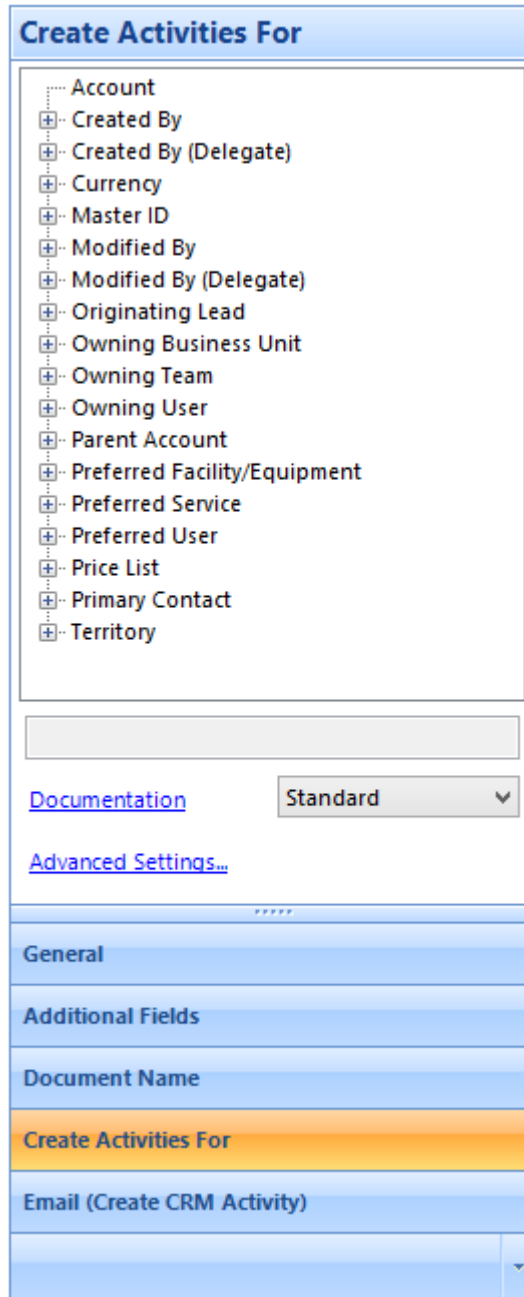
Click on [Apply] to continue. Now your Advanced Settings are set.

3.1.2.3.4 "Create Activities For" - Tab

**General**

Functions:

- Create Activities For
- Advanced CAF Settings



**Create Activities For**

- Account
- Created By
- Created By (Delegate)
- Currency
- Master ID
- Modified By
- Modified By (Delegate)
- Originating Lead
- Owning Business Unit
- Owning Team
- Owning User
- Parent Account
- Preferred Facility/Equipment
- Preferred Service
- Preferred User
- Price List
- Primary Contact
- Territory

[Documentation](#) Standard

[Advanced Settings...](#)

General

Additional Fields

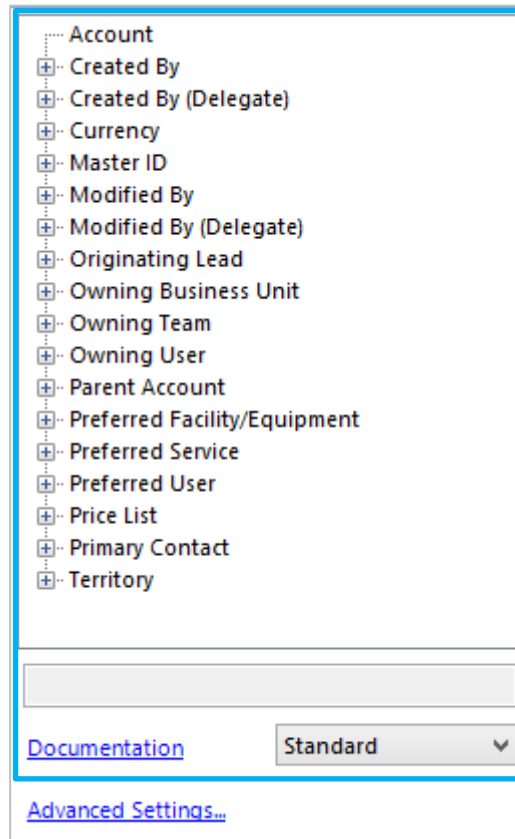
Document Name

**Create Activities For**

Email (Create CRM Activity)

## Create Activities For

If you don't want to add the activity into the Main-Entity (e.g. you are generating a quote and want to save the activities to the related contact or account.)  
Select in the tree the related entity to which the created activity should be associated.



The screenshot shows a dialog box titled "Create Activities For". It features a tree view of entities with expandable nodes. The entities listed are:

- Account
- Created By
- Created By (Delegate)
- Currency
- Master ID
- Modified By
- Modified By (Delegate)
- Originating Lead
- Owning Business Unit
- Owning Team
- Owning User
- Parent Account
- Preferred Facility/Equipment
- Preferred Service
- Preferred User
- Price List
- Primary Contact
- Territory

Below the tree view is a search bar. At the bottom, there is a "Documentation" link, a "Standard" dropdown menu, and an "Advanced Settings..." link.

Syntax: Entityname, primarykeyfield. e.g.: contact,contact\_contactid -> In this case the activity will be saved to the contact.

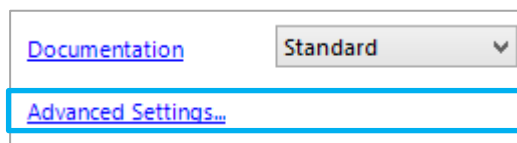
## The Advanced Settings

This new feature extends the already existing CreateActivitiesFor-property of DocumentsCorePack.

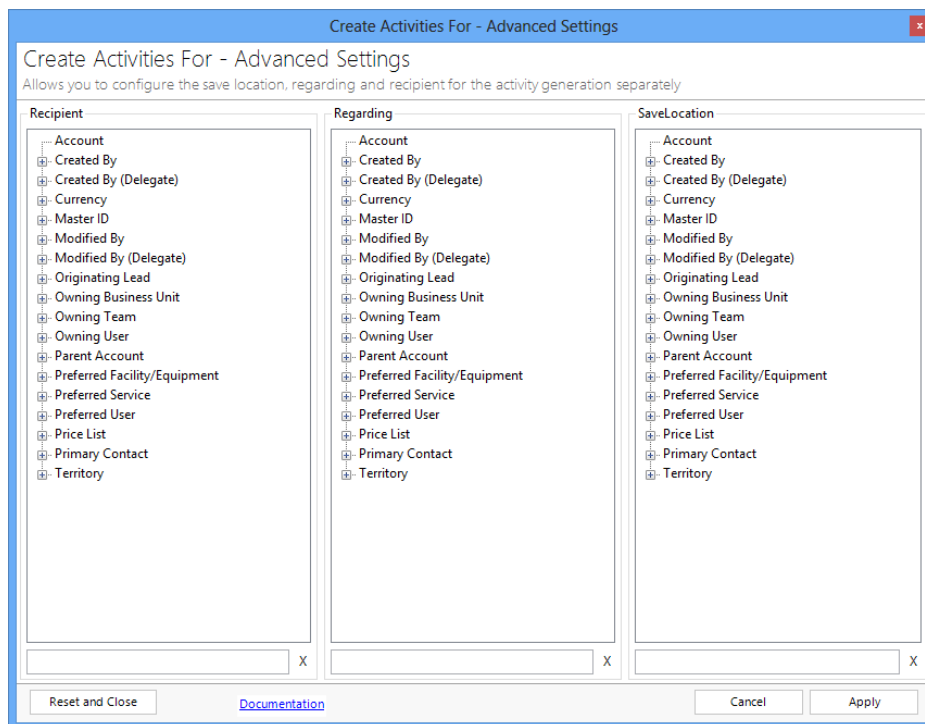
The new configuration options allow template editors to define

- Recipient
- Regarding
- Save-location

of activities based on a template independently.



Click on [Advanced Settings] and the following window appears



Here you can select the the "Recipient", "Regarding" and the "SaveLocation" for the template.

The options which can be selected for each area ("Recipient", "Regarding", "SaveLocation") are displayed in a tree view. You can insert the required relation by clicking on the nodes and by double clicking on the correct option

Click on [Apply] to continue. Now your Advanced Settings are set.

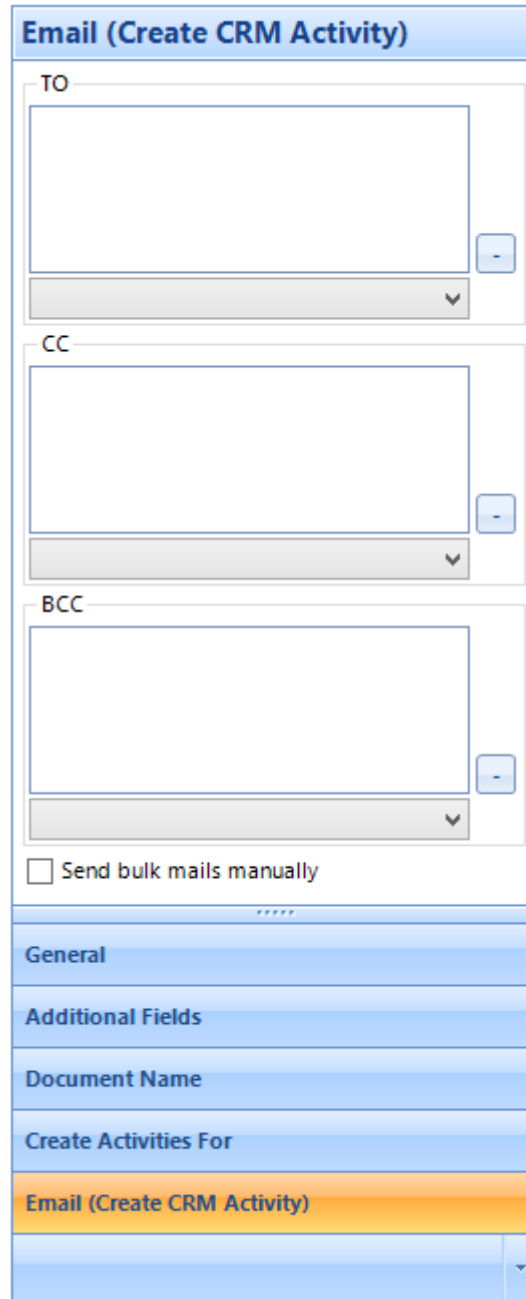
For more Technical Details and Examples visit our [Blog](#).

3.1.2.3.5 "Email" - Tab

**General**

Functions:

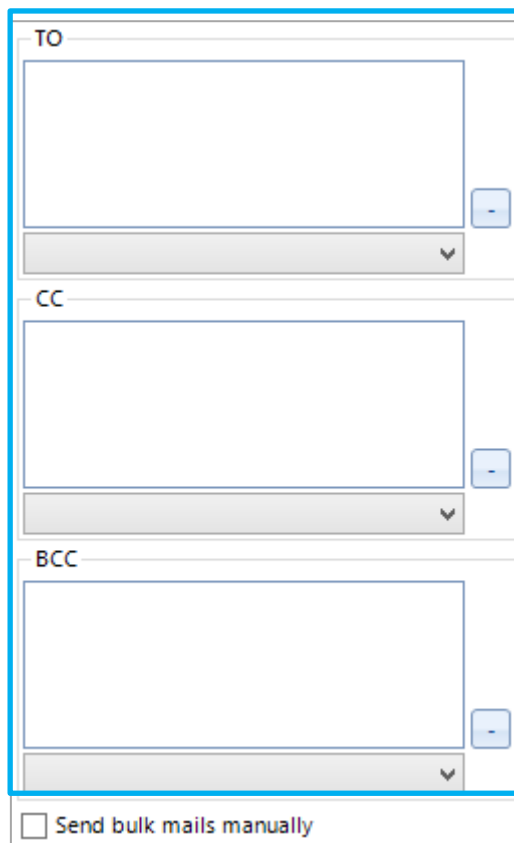
- To, CC, BCC
- Send bulk Mails manually



The screenshot displays the 'Email (Create CRM Activity)' form. It features three text input fields for 'TO', 'CC', and 'BCC', each with a small minus sign button to its right. Below these fields is a checkbox labeled 'Send bulk mails manually'. The form is part of a larger interface with a sidebar on the left containing tabs: 'General', 'Additional Fields', 'Document Name', 'Create Activities For', and 'Email (Create CRM Activity)'. The 'Email (Create CRM Activity)' tab is currently selected and highlighted in orange.

## To, CC, BCC

This setting offers the possibility to predefine "recipient", "Carbon Copy" and "Blind Carbon Copy" - addresses. It is possible to use data from Fields out of CRM to be part of the entries. The predefined email Addresses will show up in every email Activity.

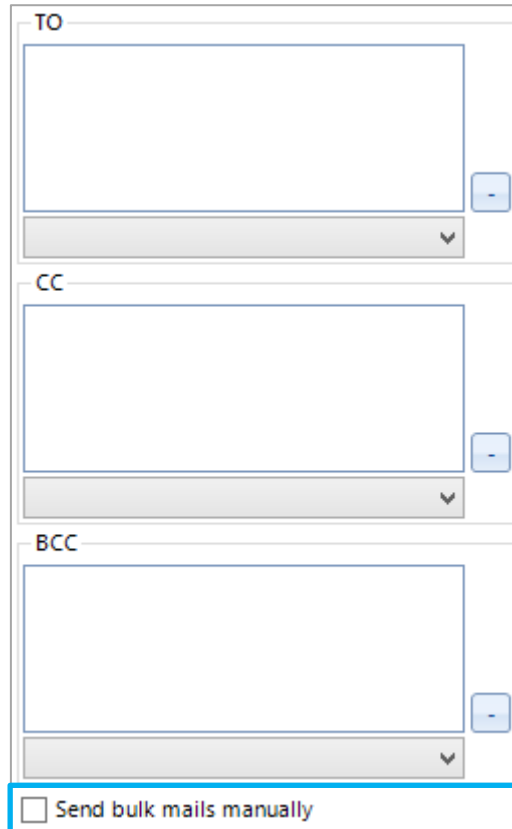


The screenshot displays a configuration window for email recipients. It is divided into three sections: TO, CC, and BCC. Each section contains a large text input area for entering addresses, a small blue button with a minus sign to the right, and a dropdown menu below. At the bottom of the window, there is a checkbox labeled "Send bulk mails manually".

Here you can select the "Recipient", "CC" and the "BCC" for the template. The options which can be selected for each area are displayed in a Dropdown. You can insert the required relation by double clicking on the nodes.

### Send Bulk Mails manually

This additional possibility makes sure no Email will be send after creating a Bulk merge - email Activity. It is possible to read and edit every Email before send it by pressing [send] on each email.



The screenshot shows an email composition window with three recipient fields: TO, CC, and BCC. Each field has a text input area, a small blue button with a minus sign, and a dropdown arrow. At the bottom of the window, there is a checkbox labeled "Send bulk mails manually".

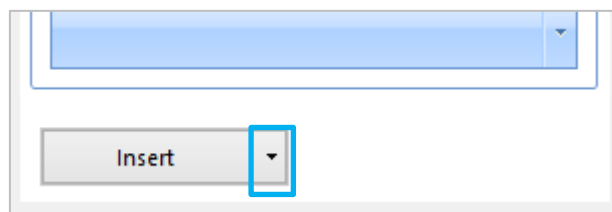
This option can be activated by crossing the Checkbox. If questions remain, please do not hesitate to contact us.

### 3.1.3 Insert Button

This feature allows to insert additional contents in your open office xml docs the [Insert] - Button is like a gateway to any additional insert options. The Insert Button is a simple and centralized way to insert every MSCRM Field as a "Special"-Field.

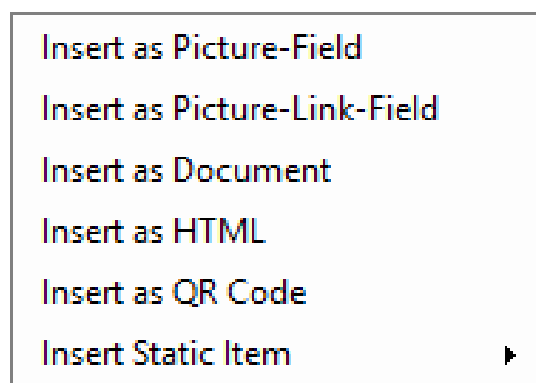
These optional modes of insertion are disposal:

- Insert as Picture/Picture-Link
- Insert as Document
- Insert as HTML
- Insert as QR-Code
- More Static insert Options
  - Insert as Static Document
  - Insert "Page Break"
  - Insert "Remove Empty Lines"
  - Insert "Join Tables"



To Access the "Insert Options"-Menu click on the arrow besides the [Insert] – Button.

After selecting a Field in the Tree above and clicking the [Insert] – Button, following Dialog appears.



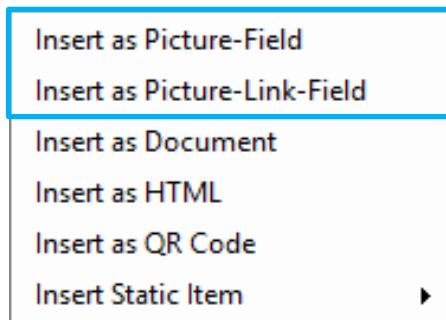
Now just select one of these opportunities.



### 3.1.3.1 Insert as Picture/Picture-Link

These two Options are very similar, "Insert as Picture-Field" allows to Insert an in CRM deposited Picture, or to Insert a Picture via a Local path restored in a CRM-Field.

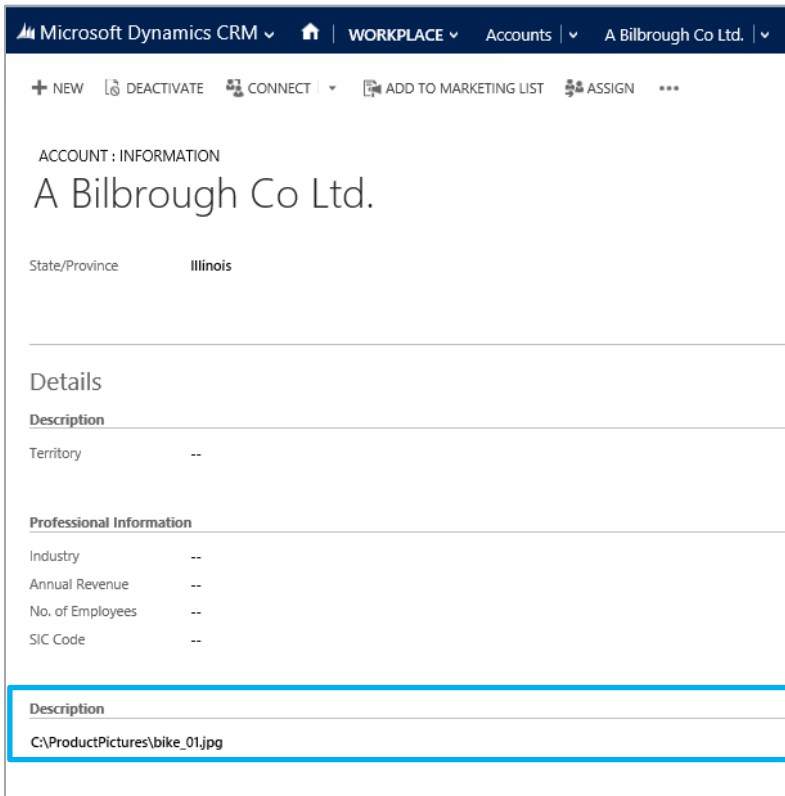
"Insert as Picture-Link-Field" though insert a Picture directly from the Link which is stored in the CRM-Field.



#### Step by Step

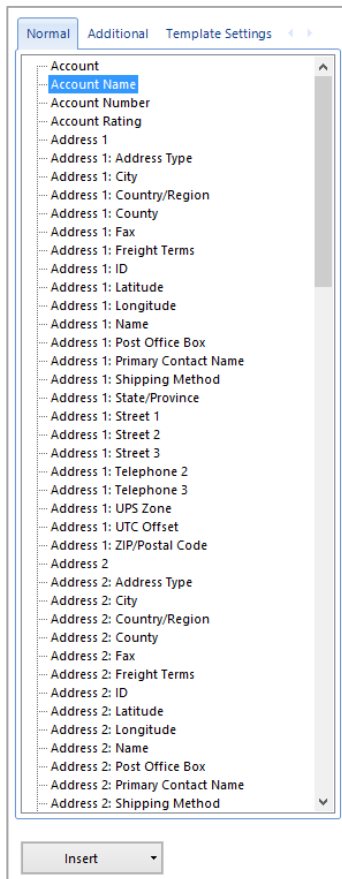
This Step by Step – Description presupposes a new or opened Template.

In this example we prepared our CRM-entry as you can see in the Screenshot blow.



## Step 1: Select a Field

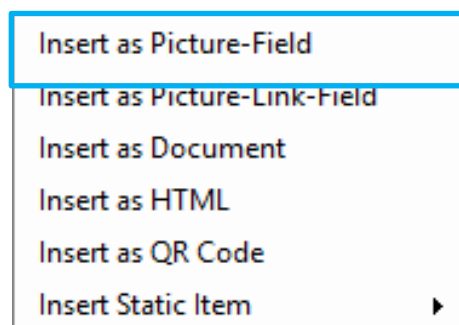
Open the DocumentsCorePack – Task Pane and select a Field to be inserted. Click once on this Name so that it is highlighted in blue.



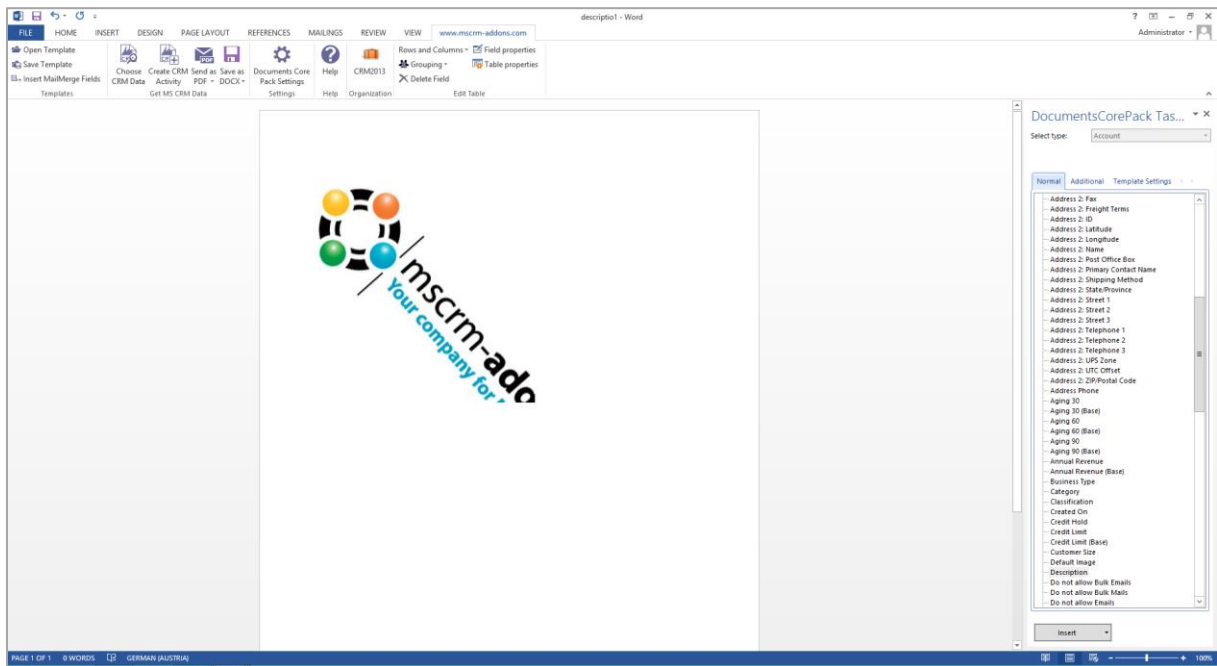
## Step 2: Insert Option

Now click on the arrow next to the [Insert] – Button.  
In our Case we insert the Field “Description” as Picture-Field.

Click on “Insert as Picture-Field”

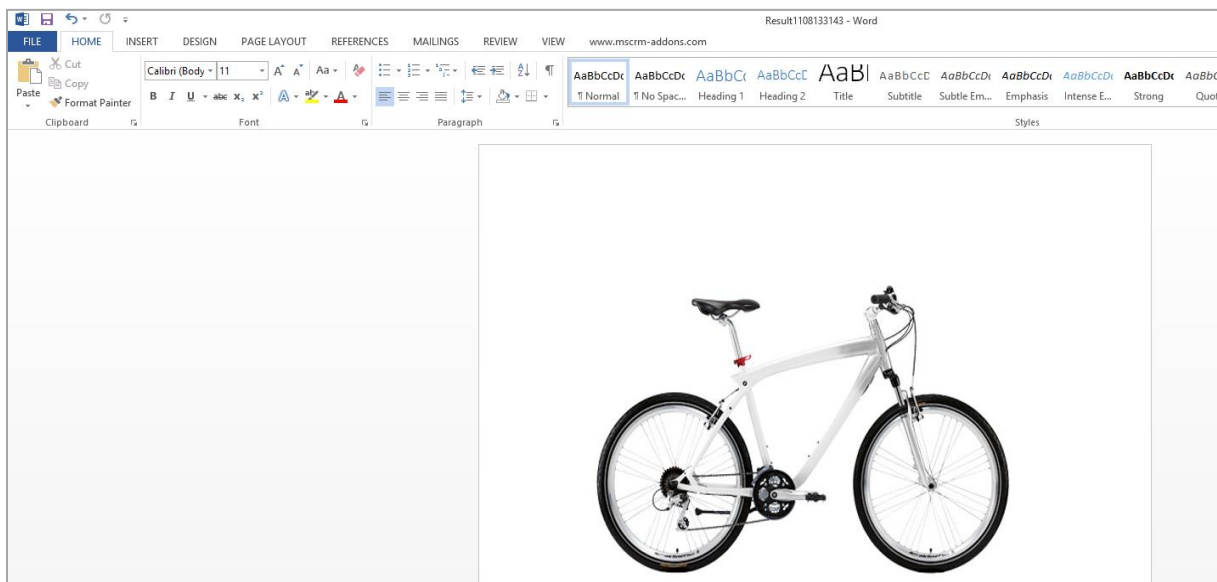


Right after your Click, a Placeholder-Picture appears in your Document.



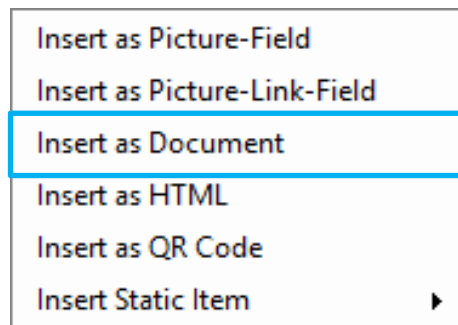
### Step 3: The Result

As you can see in the Picture below, if you merge this template, DCP resolved the Path to our Picture and inserted it into the Document.



### 3.1.3.2 Insert as Document

This feature allows you to insert a document that is stored as an annotation in your CRM.

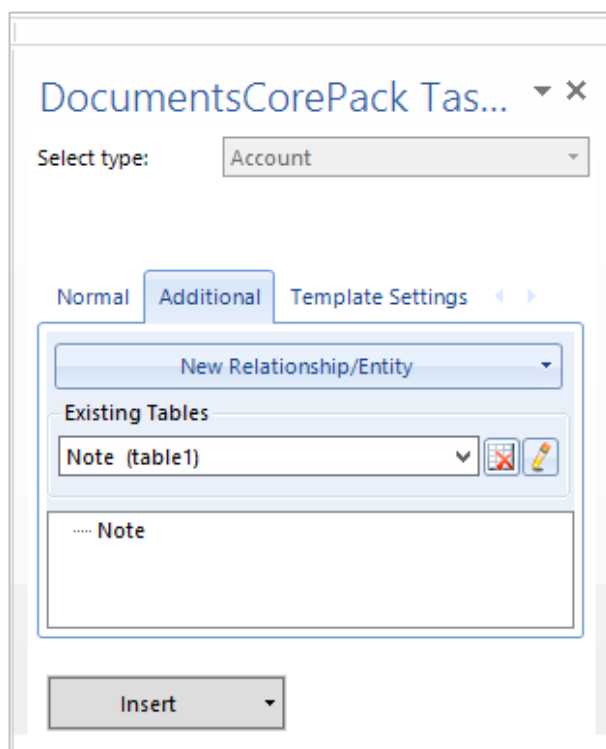


#### Step by Step

This Step by Step – Description presupposes a new or opened Template. You have to insert a Document as annotation to follow this step by step description.

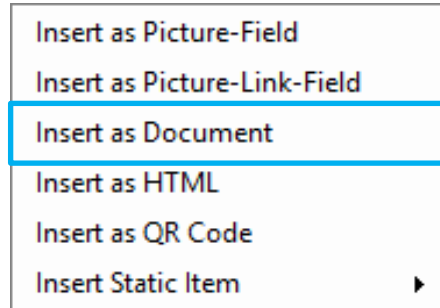
#### Step 1: Select a Field

Open the DocumentsCorePack – Task Pane and add the “Note”-Entity as additional Relationship. (For more information, how you add additional Entities click [here](#)) Click once on “Note” so that it is highlighted in blue.

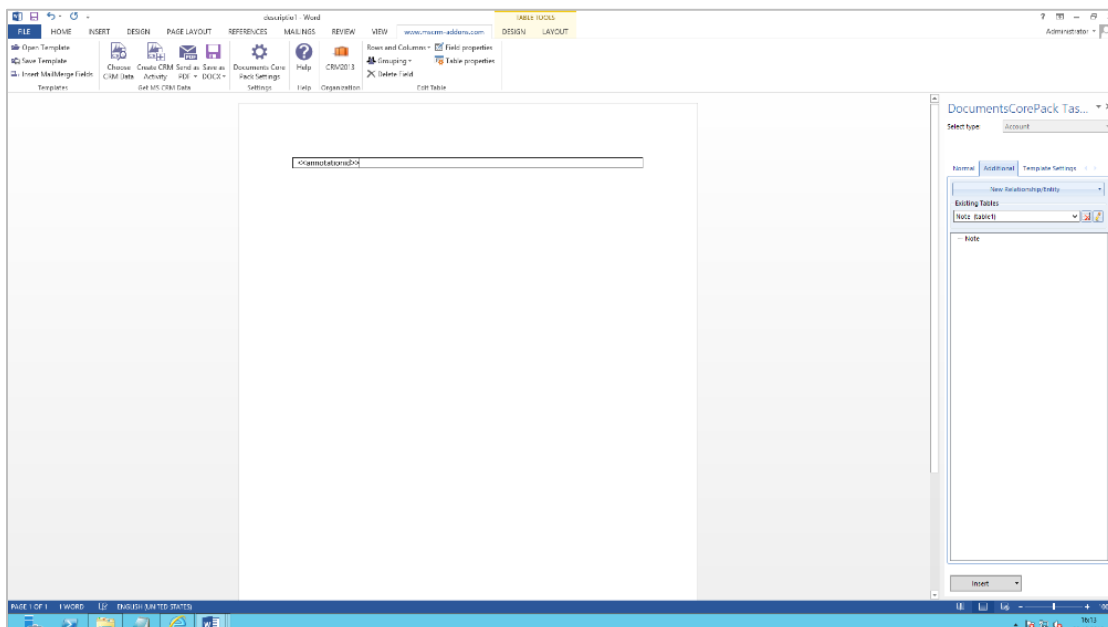


## Step 2: Insert Option

Choose the "Insert as Document"-option at the bottom to add the field as document.




After that, the merge field <<annotationid>> is added to the template.




### Step 3: The Result

Merge your Template to get the Data from the CRM-System

Here you can see the Template has a Document in our previous created Table.

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<<customerid\_account\_name>>  
 To:  mscrm-addons.com  
 Your company for MS-CRM ADD-ONS!

<<customerid\_account\_primarycontactid\_salutation>>  
 <<customerid\_account\_primarycontactid\_fullname>>  
 <<customerid\_account\_address1\_line1>>  
 <<customerid\_account\_address1\_city>><<customerid\_account\_address1\_postalcode>> -  
 <<customerid\_account\_address1\_country>>

Dear <<customerid\_account\_primarycontactid\_salutation>><<customerid\_account\_primarycontactid\_fullname>>,

Thanks for the interest in our products. Regarding your request per e-mail from 10/9/2013, we can offer you the following:

| No.  | Product Name                      | Price            | Qty.         | Amount             |
|--|-----------------------------------|------------------|--------------|--------------------|
| <<quoteid_productid_subjectid_title>>              |                                   |                  |              |                    |
| <<quoteid_productid_name>>                         | <<quoteid_productid_description>> | <<priceperunit>> | <<quantity>> | <<extendedamount>> |
| Group <<quoteid_productid_subjectid_title>> total: |                                   |                  |              | <<extendedamount>> |

Total: <<totalamount>>

This quote is valid for 30 days from today.

Insert as Picture-Field

Insert as Picture-Link-Field

Insert as Document

Insert as HTML

Insert as QR Code

Insert Static Item

#### 3.1.3.3 Insert as HTML

This feature enables you to easily insert contents (pictures, texts, etc.) into documents which have been added to a CRM record via an html editor. The new functionality is able to interpret html codes stored in CRM and to display the contents appropriately in merged documents. Furthermore, the last versions of DocumentsCorePack enable user to insert pictures into documents.

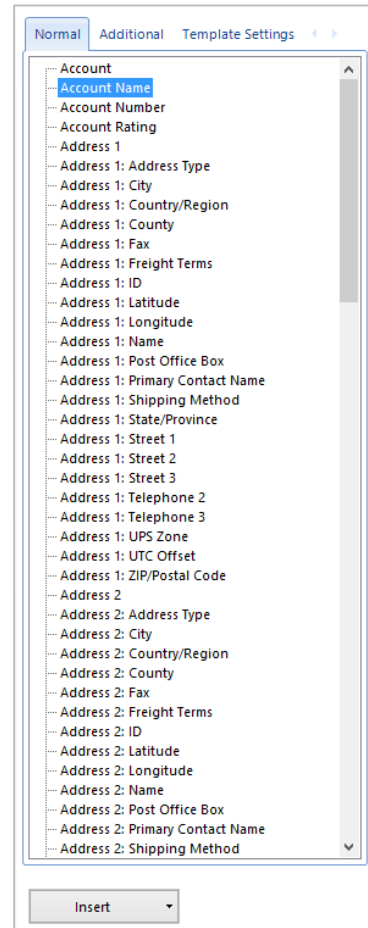
**NOTE:** Before you are able to use this functionality, you need to implement a HTML editor into your CRM system. There are various free and charged HTML editors which you can use. In our example, we work with the 'tinyMCE' HTML editor.

## Step by Step

This Step by Step – Description presupposes a new or opened Template.

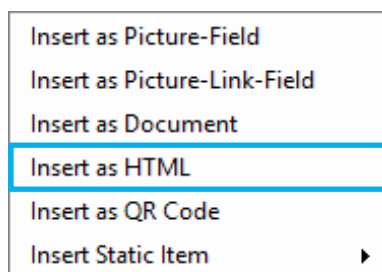
### Step 1: Select a Field

If you would like to insert the content which you added to the account using the HTML editor, set the cursor to the position in the document where you want the information to be inserted. Then navigate to the 'Normal'-tab within the DocumentsCorePack Task Pane on the right and choose the field 'HTML\_description' from the tree menu.



### Step 2: Insert Option

Choose the "Insert as HTML"-option from the "Insert"-options at the bottom to add the field correctly.

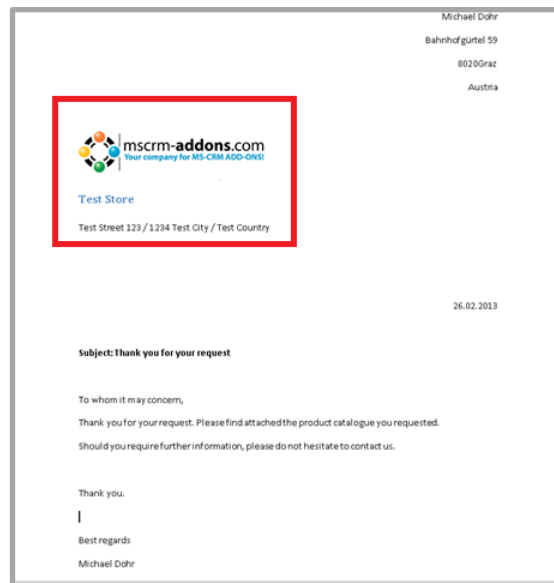


After that, the merge field <<new\_html\_description>> is added to the template. Continue to create your template by inserting the mail merge fields and the text you need. When you finished to create your template, save it.

### Step 3: The Result

After finishing and saving the template, you can start a mail merge process to get the document including data from CRM.

After the mail merge process, the document including the data from the CRM record, the document is available for further processing. In the merged document, the text parts are displayed corresponding to the settings of the style sheets of MS Word



#### 3.1.3.4 Insert as QR-Code

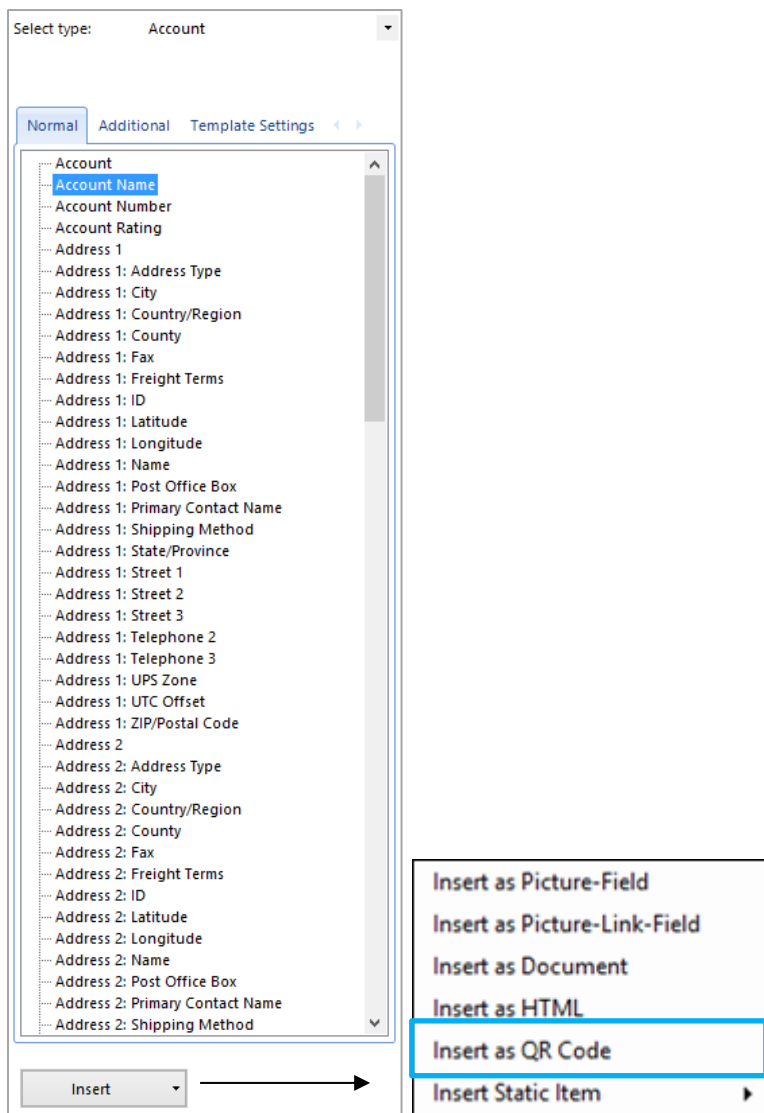
This article describes, how to insert QR-code fields in Office Open XML template (.docx). For more general information about QR-codes please click [here](#).

### Insert QR-code field

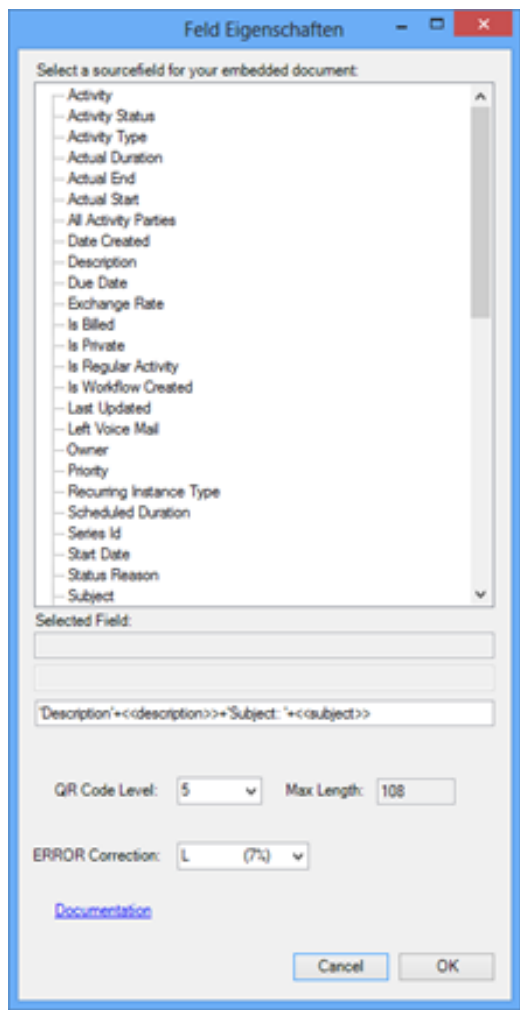
The "Insert as QR Code"-function is available on every selected template type and for every inserted field. You can find the new function in the "DocumentsCorePack Task Pane". To get there, please open an existing or create a new template.



The "DocumentsCorePack Task Pane" appears:



Choose the required type in the "Select type"-dropdown box in our example "Quote". Next click on the drop-down button within the [Insert]-button and choose the "Insert as QR Code"-function. Following window appears:



Now the required QR-code field(s) can be inserted with a double-click.

NOTE: The displayed tree contains the same fields as you have chosen before in the "DocumentsCorePack Task Pane" under "Select type". If you want to insert e.g.: account related fields, close the "field properties"-window displayed above, go back to the "DocumentsCorePack Task Pane" and choose "account":

You can insert as many fields as you want. Fields are displayed with angle brackets and separated with a "+"-sign in between. E.g.: <<description>>+<<subject>> additionally you have also the possibility to specify the name of the QR-code as follows:

Specify QR-code-Content:

This setting predefines the Content of the QR-code generated with this template. As mentioned above it's possible to use data from fields out of CRM to be part of the QR-code name. With this it is possible to generate the QR-code-name dynamically, based on constant characters and/or values of fields.

Constant characters have to be in single quotes.

To use field values in the QR-code-Content you have to choose the fields as described above or write the fieldname (schemaname) surrounded by <<and>>. Some examples:

| QR-code-name   | possible QR-code-name results |
|--|-------------------------------|
| 'quote-' + <<quotenumber>>.pos(4,5)                    | quote-12345                   |
| <<customerid_account_name>>+'-'<br>' + <<quotenumber>> | TestCompany-QUO-12345-KWKJQ6  |

It is important that the inverted commas are also set!

Functions:

".pos(x,y)" will insert y signs from the xth position.

".left(x)" will insert the first x – signs

".right(x)" will insert the last x signs of the string

- Type: shows the inserted field type. In our case it is "qrcode".
- Name: shows the name of the inserted field.
- QR Code Level: shows the displayed level of the QR-Code. The default-setting detects the smallest value. If e.g.: the value of this option is set with 5 with a maximum sign-length of 108, then only 108 signs will be displayed. All the signs which exceeds this maximum length is cut. By clicking on the dropdown-button the level can be set from 1-20.
- Max Length: shows the maximum length of the information the QR-code contains. The maximal length changes automatically with the chosen QR-code level.

**IMPORTANT:** It is recommended to choose the default value to ensure that the information is resolved properly! Standard QR-code readers are able to dissolve the QR-code properly if the level has a maximal value 8. Otherwise the QR-code reader has to provide a higher quality.

- ERROR Correction: defines the capacity and fault tolerance of the QR-code. The value shows the amount that can be restored in percent. Please find in the list below the common level.

Capacity of the different error correction levels:

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

Afterwards all the selected types and fields will now be inserted as a QR Code:



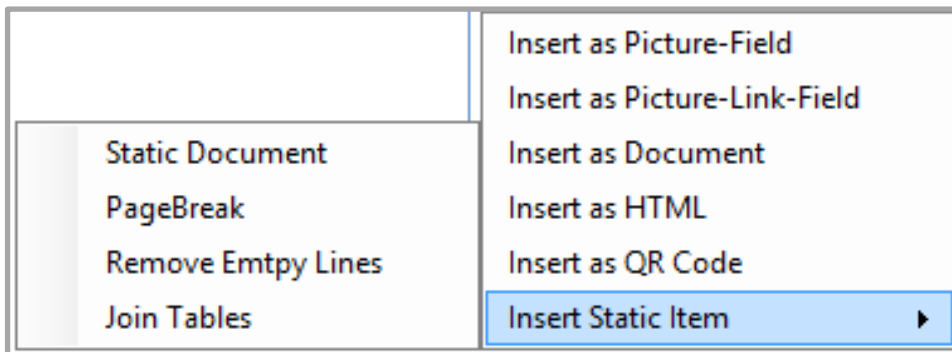
Now the QR-code is ready to be merged with data from CRM. The QR-code can be a link, a visit-card-contact, contact, product information etc.

NOTE: The information that the QR-code contains has to be plain text information!

If you have any questions about this product, please send an Email to [support@mscrm-addons.com](mailto:support@mscrm-addons.com)

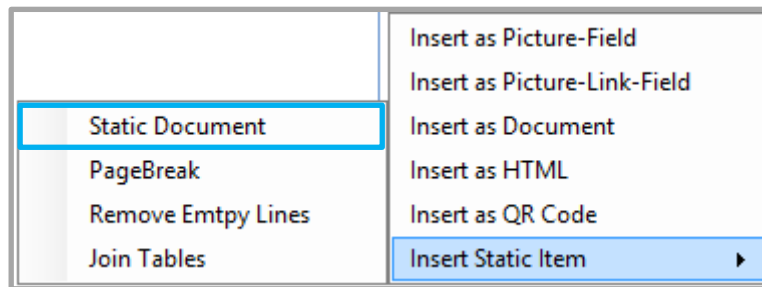
### 3.1.3.5 More Static insert Options

These additional Static Options include the possibilities to format and structure the Document as well as to insert Static Document.

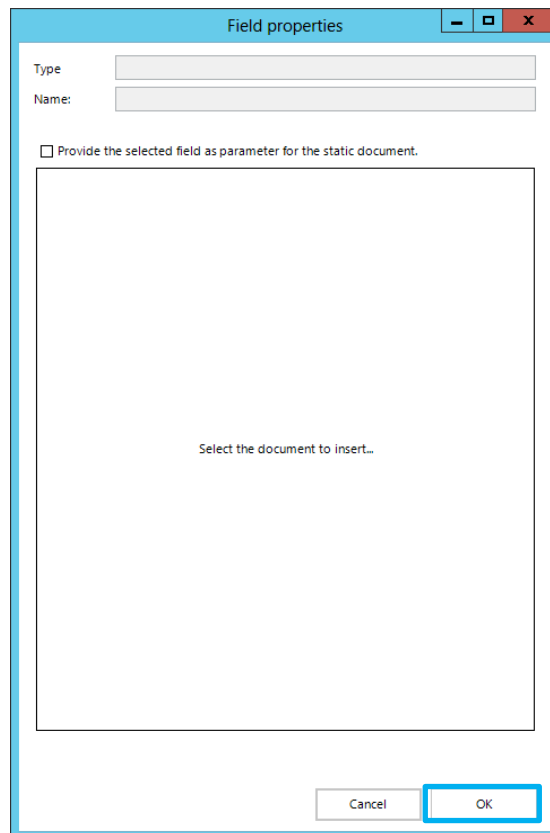


3.1.3.5.1 Insert as Static Document

Insert Static Document provides the possibility to insert every Document that is located in the Save location of your CRM. The Difference between [Insert as Document] and [Insert as Static Document] is with Insert as Document you could insert every Document provided it is added as Annotation to a Record, and with Insert as Static Document every Document in your DCP Save Location can be inserted.



After [Static Document] was pressed immediately following window appears



Once a .docx Document is selected confirm the selection with [OK]

### 3.1.3.5.2 Insert "Page Break"

Simply explained this Feature inserts a page break. Before the merge a placeholder is displayed after the merge it is a page break

#### Before

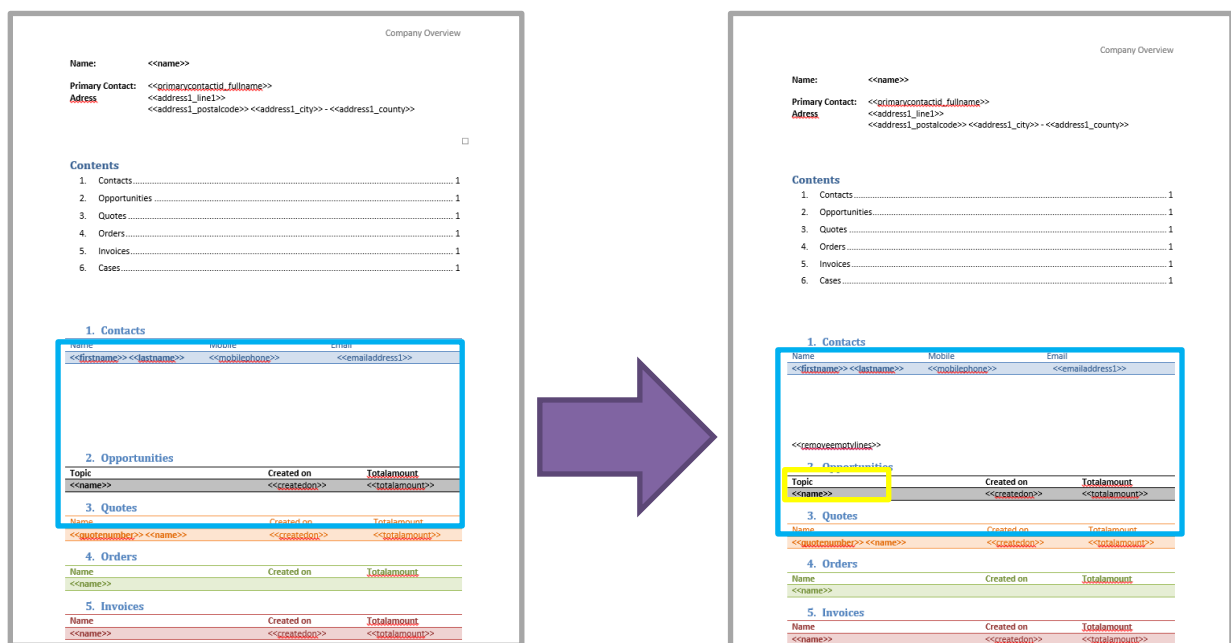


#### After



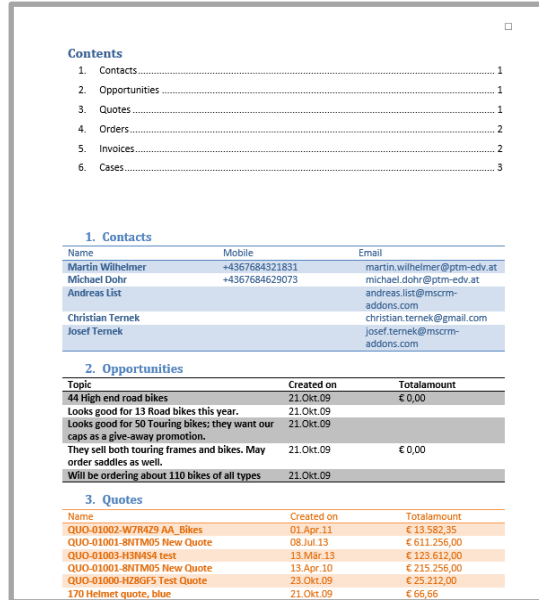
### 3.1.3.5.3 Insert "Remove Empty Lines"

"Remove Empty Lines" – Fields are a simple way to dynamically structure your Document after the merge process. For Example you want to delete these unnecessary Lines, between Contacts and Opportunities, just insert a "Remove Empty Lines" – Field.



We inserted the "Remove Empty Lines" – Fields at the Position where all empty Lines above should be deleted.

The Result:



**Contents**

- 1. Contacts..... 1
- 2. Opportunities..... 1
- 3. Quotes..... 1
- 4. Orders..... 2
- 5. Invoices..... 2
- 6. Cases..... 3

**1. Contacts**

| Name             | Mobile         | Email                         |
|------------------|----------------|-------------------------------|
| Martin Wilhelm   | +4367684321831 | martin.wilhelm@ptm-edv.at     |
| Michael Dohr     | +4367684629073 | michael.dohr@ptm-edv.at       |
| Andreas List     |                | andreas.list@mscrm-addons.com |
| Christian Ternek |                | christian.ternek@gmail.com    |
| Josef Ternek     |                | josef.ternek@mscrm-addons.com |

**2. Opportunities**

| Topic   | Created on | Totalamount |
|---|------------|-------------|
| 44 High end road bikes  | 21.Okt.09  | € 0,00      |
| Looks good for 13 Road bikes this year.                                       | 21.Okt.09  |             |
| Looks good for 50 Touring bikes; they want our caps as a give-away promotion. | 21.Okt.09  |             |
| They sell both touring frames and bikes. May order saddles as well.           | 21.Okt.09  | € 0,00      |
| Will be ordering about 110 bikes of all types                                 | 21.Okt.09  |             |

**3. Quotes**

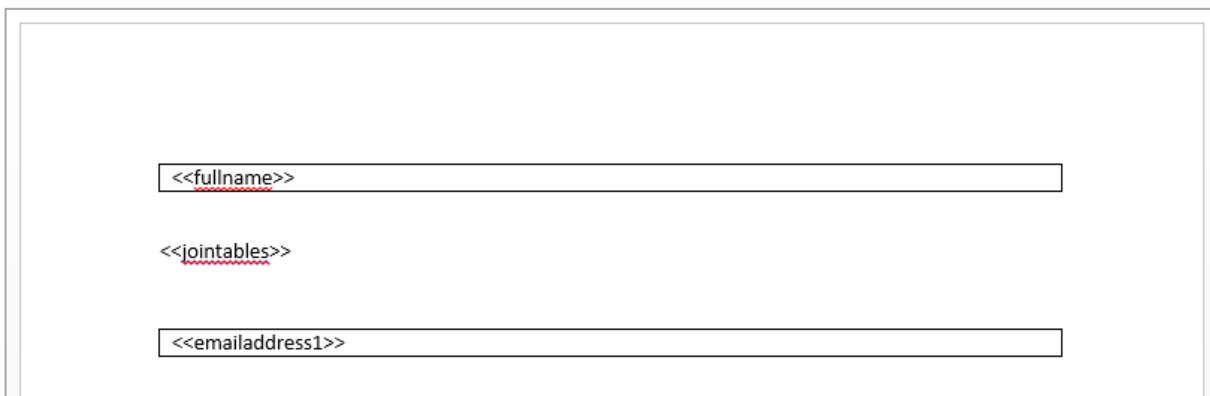
| Name                        | Created on | Totalamount  |
|-----------------------------|------------|--------------|
| QUO-01002-W7R4Z9 AA_Bikes   | 01.Apr.11  | € 13.582,35  |
| QUO-01001-8NTM05 New Quote  | 08.Jul.13  | € 611.256,00 |
| QUO-01003-H3W454 test       | 13.Mar.13  | € 123.612,00 |
| QUO-01001-8NTM05 New Quote  | 13.Apr.10  | € 215.256,00 |
| QUO-01000-HZ8GF5 Test Quote | 23.Okt.09  | € 25.212,00  |
| 170 Helmet quote, blue      | 21.Okt.09  | € 66,66      |

As you can see in the Screenshot above, every Empty Line is deleted and, the Document is proper structured now.

### 3.1.3.5.4 Insert "Join Tables"

"Join Tables" combines the table above the statement and the table under the statement with each other, making a single table out of it.

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



<<fullname>>

<<jointables>>

<<emailaddress1>>

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

|                     |
|---------------------|
| Michael Ornigg      |
| Herbert Dorner      |
| test@test.com       |
| someone@example.com |

### 3.1.4 Other Functions

In this Chapter we introduce every not previously classified Template functions

#### 3.1.4.1 Insert "If/Else" - conditions

It is often required to place conditional fields within a template like e.g. only print address lines when stored in the regarding CRM-record.

Syntax:

The syntax needed is pretty simple:

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

where the yellow part marks the condition, the green part the content that will be printed if the conditions is fulfilled and the red part the content that is printed if the condition is not met vice versa.

**IMPORTANT:**

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

Examples:

Printing a gender-specific salutation:

```
Dear {if" <<salutation>> "="Mr." "Mister" "Misses"} <<lastname>>
```

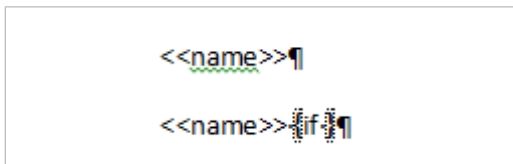
Showing fields only if available within CRM:

```
{if" <<emailaddress1>>" <>"" "Email: <<emailaddress1>>" ""}
{if" <<mobilephone>>" <>"" "<<mobilephone>>" }
```



## Common problems:

- Field – code brackets cannot be inserted inside a content control. Please ensure that the content control of the CRM-field you are using is not marked when trying to insert the {}-brackets.
- For some reasons it is not possible to insert the brackets even outside the content-controls once there is nothing else than the content-control in the whole line. To overcome this issue you can simply insert any text or a space after or before the field and then insert the {} brackets.



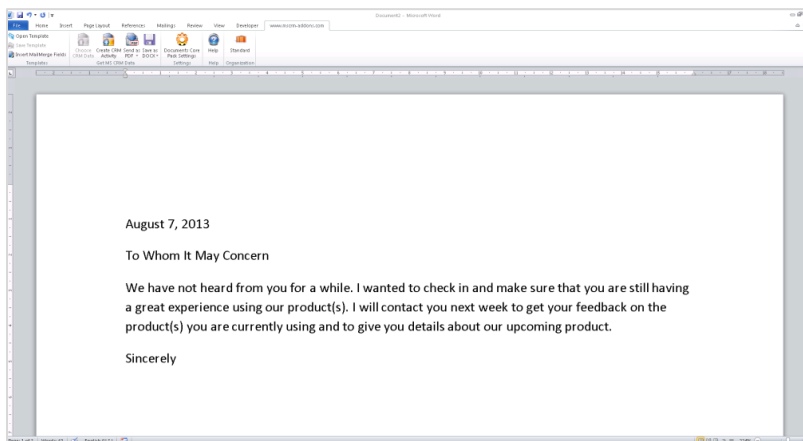
The {} cannot be inserted in the upper line of this picture without placing any kind of text. In the second line a space has been inserted after the name-field.

## 3.2 Deprecated Word Standard (.dot)

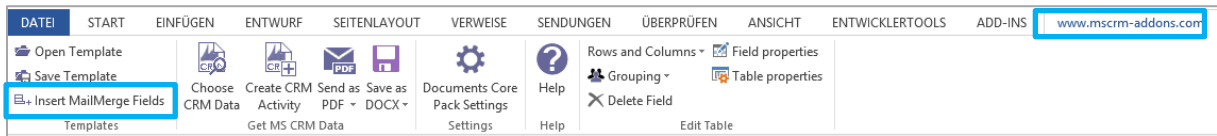
### 3.2.1 Deprecated Word Standard – generate Template

The following steps will show you how to create a DocumentsCorePack-template.

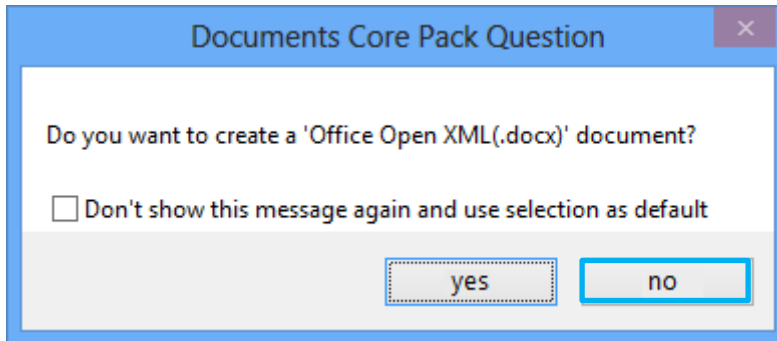
1. Start Microsoft Word.
2. Write or open a document with the required content.



3. We will add the MS CRM fields now. To do this, click [Documents Core Pack for MS CRM] -> [Insert MailMerge Fields] in the toolbar.

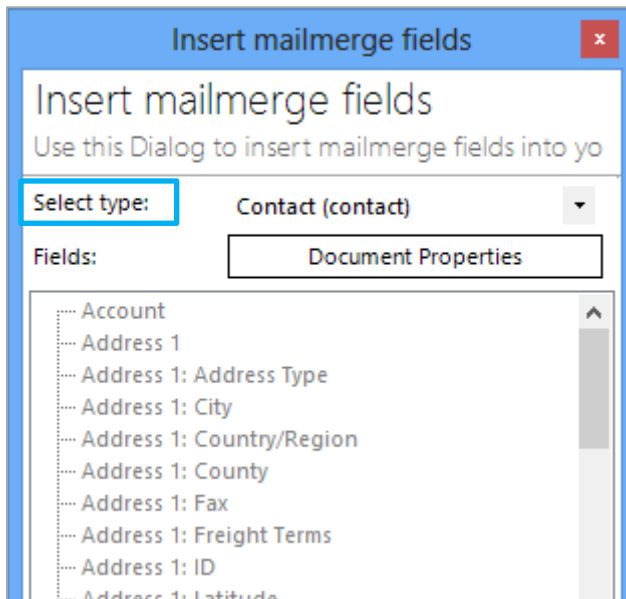


4 The following message will appear:



Press [No] to proceed creating the .dot template.

5. The following taskbar will appear:



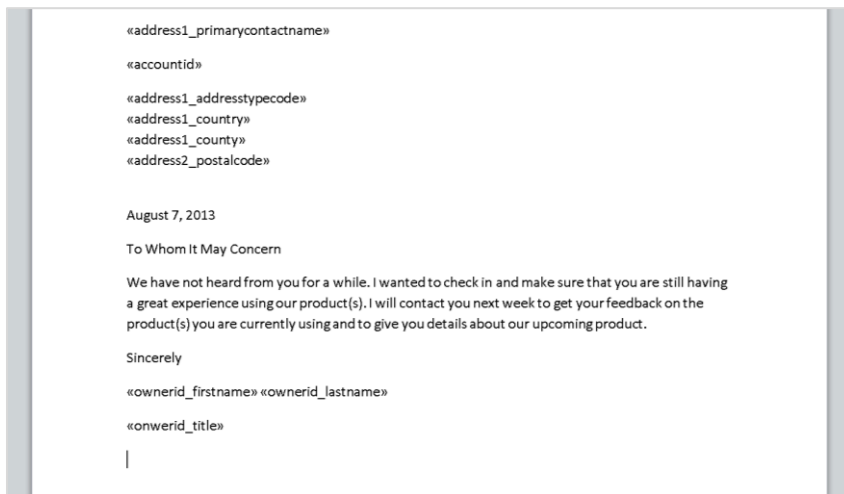
First, choose the entity of the template you want to create [Select Type].

There are specific CRM-attributes and different form letter-fields for each entity.

If "Contact" is selected, CRM will only work with fields of the entity "Contact". We have chosen "Contact" in our example.

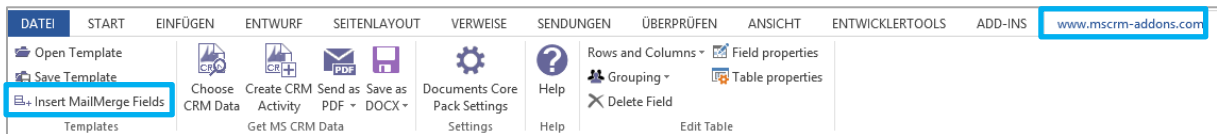
With a double click on the various fields or by selecting specific fields and clicking on the button [Insert] the selected fields are inserted into the template.

6. After adding some fields, the template will look like this:

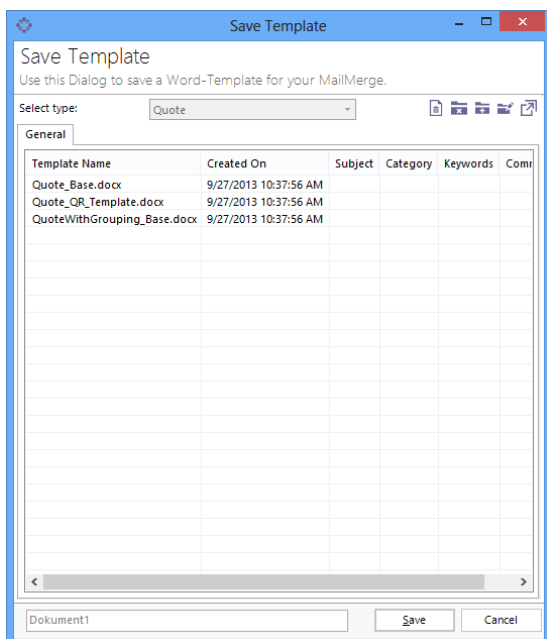


7. Now save the template.

[Documents Core Pack for MS CRM] -> [Save Template]



8. The following dialog will appear:

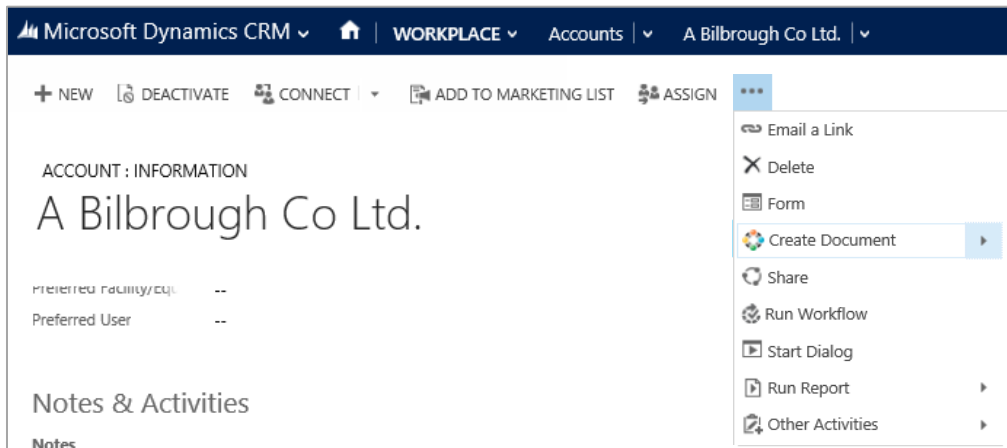


In this window you can name the template you created and decide in which category it should be stored.

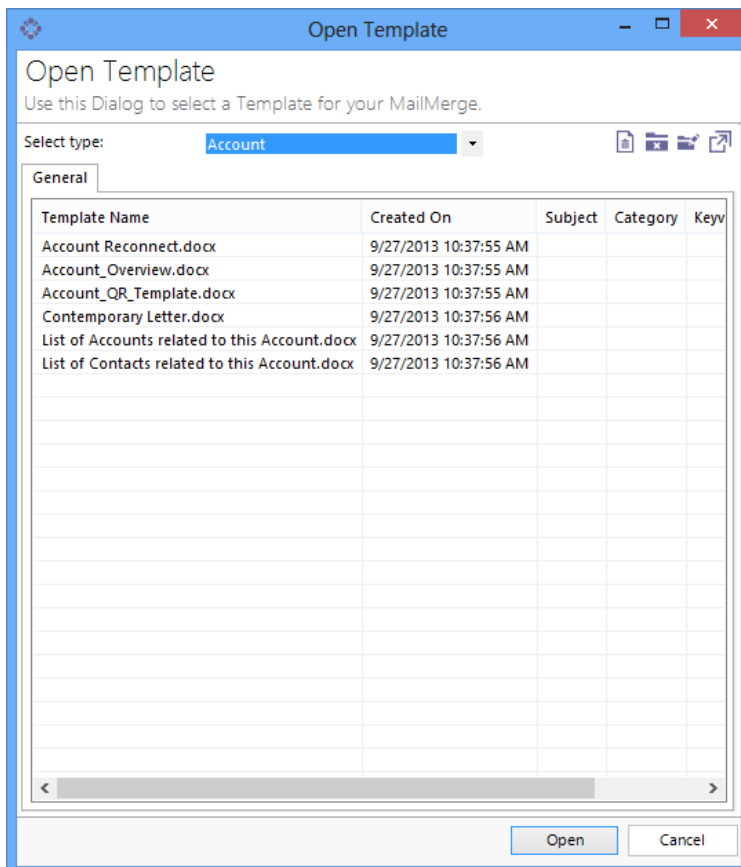
In this dialog you are able to:

- Create new groups
- Update existing groups
- Delete templates

The template is now ready to be used. To run a first mailmerge, we open the MS CRM Client and open an account. A merge can be started with a click on the "Create Document" button at the top.



9. After clicking on [Create Document], a new dialogue that allows us to choose the template we want to use appears:



10. Select your template and click [Open Temp]. You will see that the letter contains the selected fields. The fields are filled with data from the selected contact.
11. In order to produce a letter-activity with the generated template and the content you wrote as a description, click the [CRM Activity]- button in MS Word.

The content of the word file will be used automatically as description.

### 3.2.2 Document/Template Settings

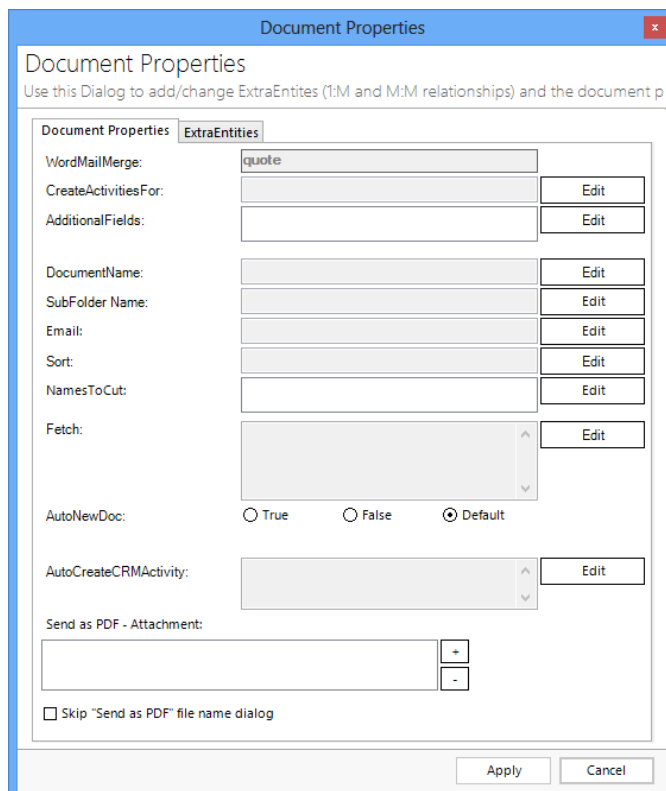
Document properties are template – specific settings that improve the use of the templates by predefining things like:

- the document name of the created document
- the default save location
- Sort-order of the loaded data

Many photos and additional information make the content easy to understand should you still have questions do not hesitate to contact our support team or take a closer look at our [Blog](#).

#### 3.2.2.1 “Document Properties” - Tab

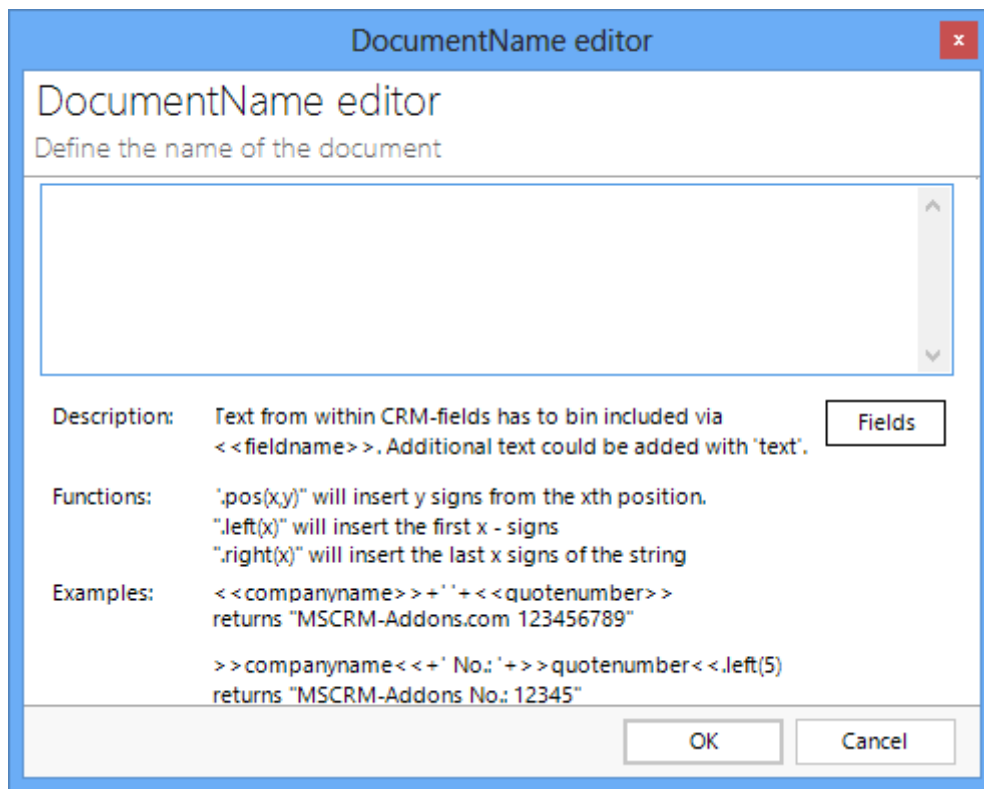
This Dialog can be used to add or change ExtraEntities (1:M and M:M relationships) and the Document Properties.



To change any DCP-Property please use the [Edit] Button!

**Settings:**

- WordMailMerge: displays the CRM-entity the template belongs to (e.g. account)
- CreateActivitiesFor: needed if you don't want to add the activity into the main-entity (e.g. you are merging a marketing list and want to save the activities to the contacts or accounts from in the marketing list)  
Syntax: Entityname, primarykeyfield. e.g.: contact,contact\_contactid -> In this case the activity will be saved to the contact.
- Additionalfields: to read out additional fields (attributes) which are not defined in the document; This means that those fields are loaded into the template automatically (e.g id-fields,...). This is very helpful e.g to send emails via DocumentsCorePack and you don't want the email address to be shown on the template.
- DocumentName: Here it's possible to predefine the name of the documents generated with this template. It's possible to use data from fields out of CRM to be part of the document name. (e.g. Company+Quotenumder.doc)

Functions:

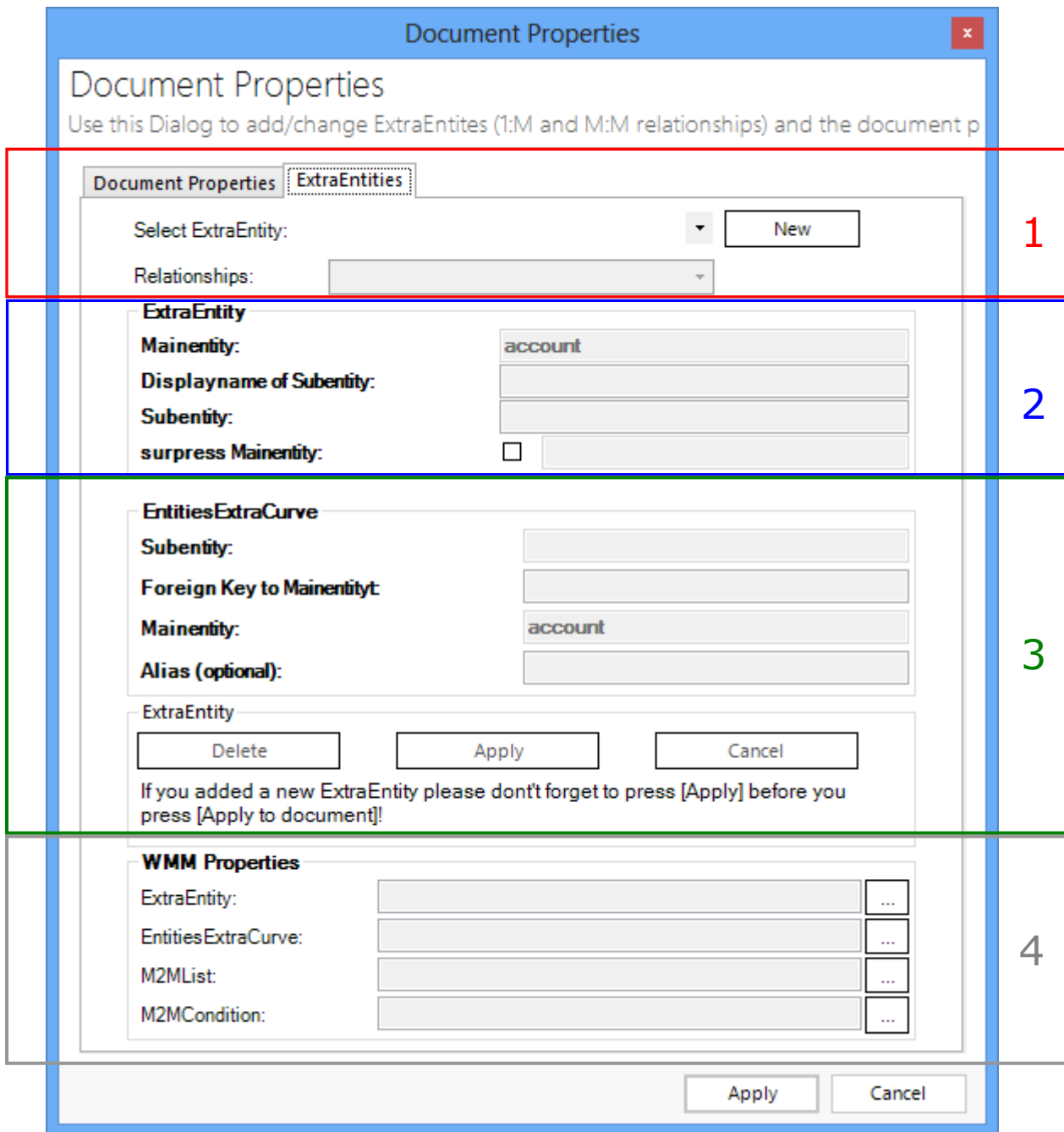
- ".pos(x,y)" will insert y signs from the xth position.
- ".left(x)" will insert the first x – signs
- ".right(x)" will insert the last x signs of the string

- SubFolderName: When using the SharePoint or FileExplorer-integration, the documents are saved in a specific folder. This option allows defining CRM-record-specific subfolders. (e.g. save a quote in the standard-quote-folder + a ParentCustomer-Subfolder)
- Email: This property allows predefining an email attribute. Email address stored in this field will be used by all mailing procedures within DCP.
- Sort: This property allows setting sort-parameters for the loaded records. E.g. Sort quote-product by LineItemNumber- ascending, or sort loaded contacts by lastname – ascending. Syntax: fieldname collation (e.g name A -> sorted ascending by name , D for descending)
- NamesToCut: In MS Word mergefields are not allowed to be longer than 42 characters. With this setting, parts of a fieldname can be shortened to work around this limitation. Syntax: [Text to abbreviate] – [short name], e.g. parentcustomer-pc1
- AutoNewDoc: If you just select one row (of contact, account, a.s.o.) DCP automatically merges your template into a doc. Sometimes you don't want DCP to do so (e.g. if you want to send it as an email). In this case, set this property to false. Values: true, false, default (setting is overtaken from the DocumentsCorePack settings)
- Send as PDF Attachment: Here it's possible to define static attachments that should be added to the email activity. E.g. add a "Terms & Conditions.pdf" when sending a quote as a PDF.
- Skip Send as PDF –Filename dialog: Allows skipping the SaveFileDialog when using the "Send as PDF" functionality.

3.2.2.2 "Extra Entities" - Tab

This tab allows resolving one – to – Many relationships. (It's possible to create M:M relationships too, but this is quite complex and requires help from our support team members)

Basically, this tab is separated into 4 areas:



The screenshot shows the 'Document Properties' dialog box with the 'ExtraEntities' tab selected. The dialog is divided into four numbered regions:

- Region 1 (Red border):** Contains the 'Document Properties' and 'ExtraEntities' tabs, a 'Select ExtraEntity:' dropdown menu, a 'New' button, and a 'Relationships:' dropdown menu.
- Region 2 (Blue border):** Contains the 'ExtraEntity' section with fields for 'Mainentity:' (value: account), 'Displayname of Subentity:', 'Subentity:', and 'surpress Mainentity:' (checkbox).
- Region 3 (Green border):** Contains the 'EntitiesExtraCurve' section with fields for 'Subentity:', 'Foreign Key to Mainentity:', 'Mainentity:' (value: account), and 'Alias (optional):'. Below this are 'Delete', 'Apply', and 'Cancel' buttons, and a note: 'If you added a new ExtraEntity please don't forget to press [Apply] before you press [Apply to document]!'.
- Region 4 (Blue border):** Contains the 'WMM Properties' section with fields for 'ExtraEntity:', 'EntitiesExtraCurve:', 'M2MList:', and 'M2MCondition:', each with a corresponding '...' button.

At the bottom of the dialog are 'Apply' and 'Cancel' buttons.



## 1. Select / Create relationship

In this section it is possible to select an existing extra entity by choosing one out of the listbox. To create a new one press [New] and select one of the given relationships in the drop-down listbox. It is also possible to create a new relationship from scratch (only for enhanced users). After that, you are in the "edit-mode". This means that the tree button [Delete], [Apply] and [Cancel] are now active. Furthermore, some fields from the sections below are active.

## 2. Groupbox ExtraEntity

\* DisplayName of the sub-entity: That's the DisplayName of your "new" sub-entity, as it will be shown in the tree.

\* Subentity: the entity you want to show in the tree

\* suppress mainentity: (this field is the same as 'Foreign Key to Mainentity' of Groupbox EntitiesExtraCurve - so please prefill this field.) Check the box if you don't want to show the main-entity in the new sub-entity. E.g. If you want to add product-details to the entity product. If you don't check the "suppress main-entity" option, the field product will be shown again in the "product details"-submenu.

## 3. Groupbox EntitiesExtraCurve

\* Subentity: the entity you want to show additional in your tree

\* Foreign key to main-entity: the attribute which is the key to the main-entity. (in XML: Referencingattribute) After you have filled in all the fields you can press [Apply] to add this 1:M Relationship to the:

## 4. DCP Properties Groupbox

\* ExtraEntity: This DCP-Prop is used to show the additional entity in the tree.

\* ExtraEntityCurve: This one defines how the data is fetched out of CRM.

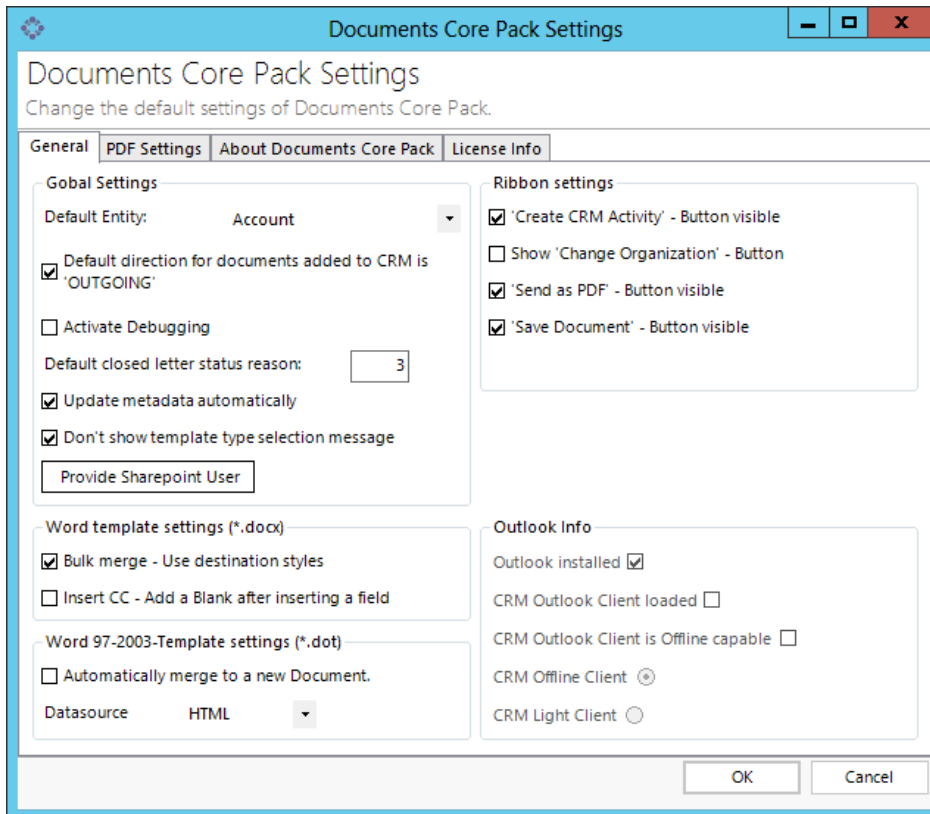
\* M2MList: This is to create/add M:M relationships by hand.

\* M2MCondition: Field to add special conditions to M:M relationships.

## 4 DocumentsCorePack Settings (WordMailMerge Settings)

This chapter explains the settings of the DocumentsCorePack-Client (MS Word->www.mscrm-addons-Ribbon->WordMailMerge Settings). In most cases the default settings are fitting the users-requirements.

### 4.1 General - Tab



#### Settings:

- Global Settings
- Word Template settings (\*.docx)
- Word 97-2003-Template settings (\*.dot)
- Ribbon Settings
- Outlook Info

If your internet download bandwidth is low, it is recommended to disable this option

---

## Global Settings

- Default Entity: defines the default Entity for a new Template.
- Default direction for documents added to CRM is ,Outgoing': defines the default direction for created activities (letter, fax).
- Activate debugging: required for support-issues only; The log-files contain detailed descriptions about what was happening in case of errors. As logging always comes with a decrease in performance, you should leave this setting deactivated unless a mscrm-addons- support team member asks you to activate it.
- Default Closed Letter status reason: Specifies what the status of the Activity in CRM is
- Update Metadata automatically: Load all Changes and Data automatically into DCP after a restart of The DocumentsCorePack Data Provider. NOTE: If your internet download bandwidth is low, it is recommended to disable this option.
- Don't show Template Type Selection Message: With this Option you will no longer asked if you want to create a .dot or a .docx Template
- Provide SharePoint User: Enter extra SharePoint Credentials if needed and the SharePoint Settings are not on Integrated Security

### Word Template settings (\*.docx)

- Bulk merge: If this Option is unchecked only 4069 Aspose styles could be generated.
- Insert CC: Insert Automatically a Blank after every Field at the Insert process

### Word 97-2003-Template settings (\*.dot)

- Automatically merge to new Document: When checked, a new document will automatically be generated once the data is loaded. (e.g. after hitting the "Create Document"-button on a quote).
- Datasource: Choose the data source that should be used for storing temp-data.

### Ribbon Settings

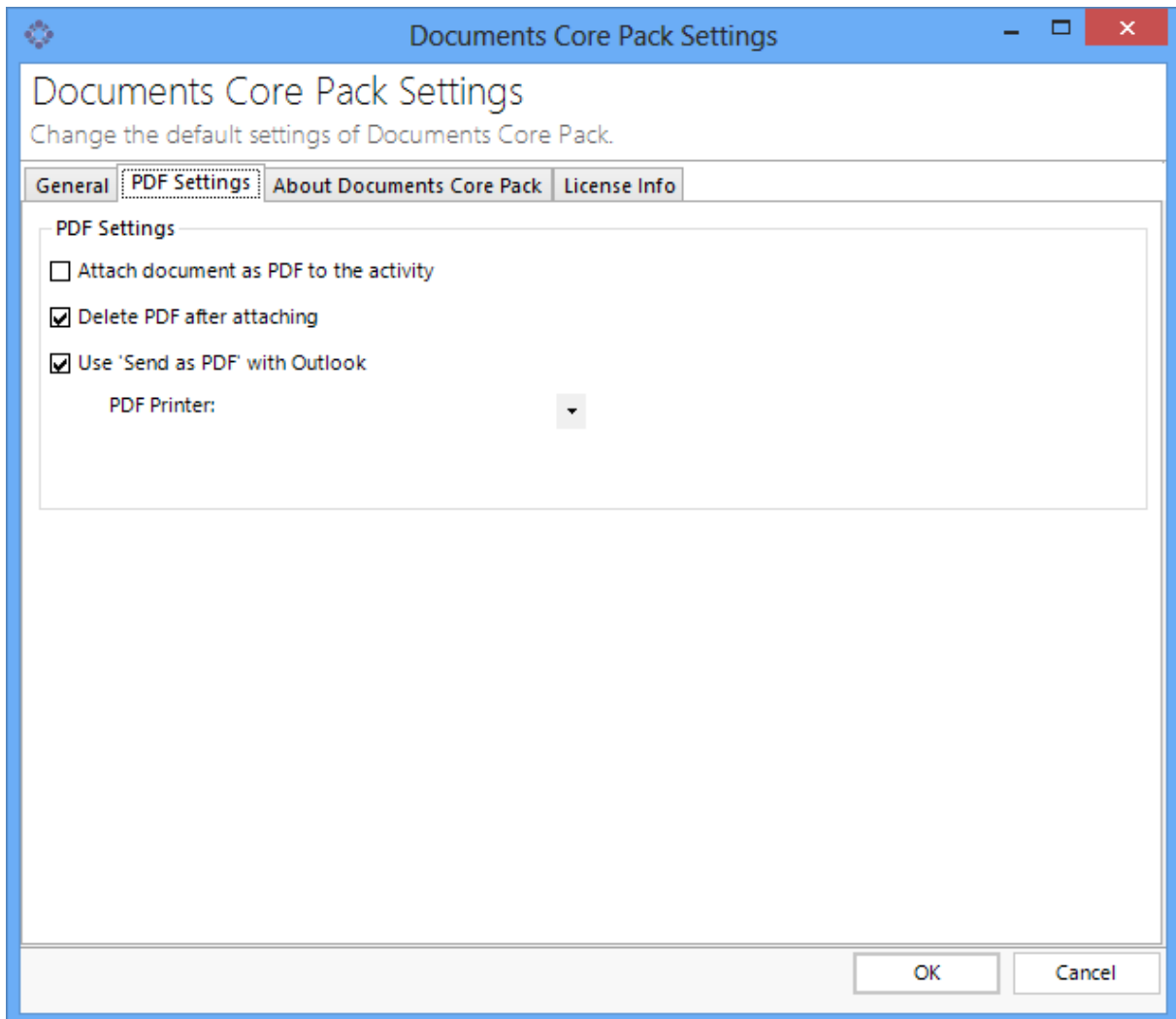
- Button visibility: Set the Visible State of every Ribbon Button

### Outlook Info

- Info: This is just an Information Box about the State of your Outlook

## 4.2 PDF-Settings- Tab

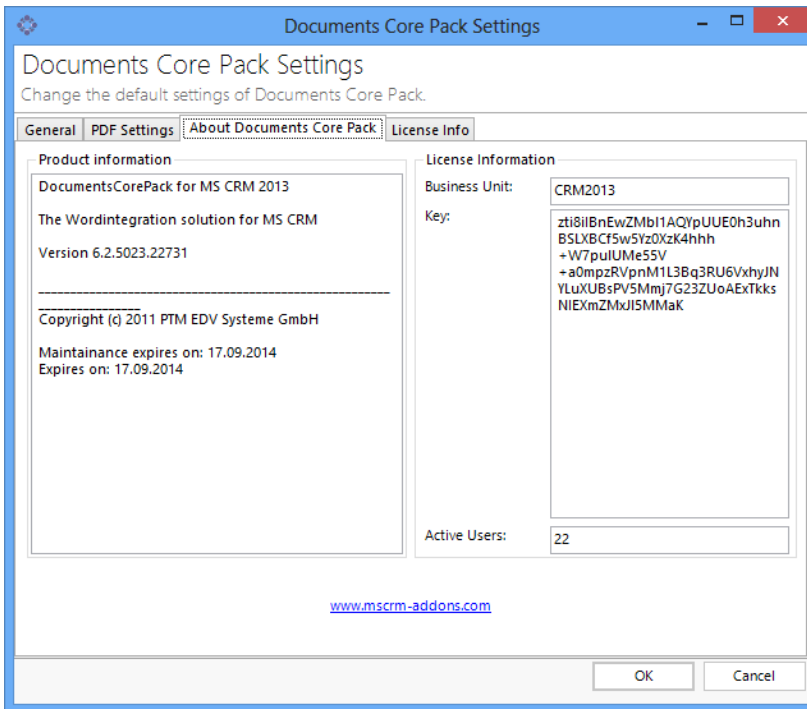
Contains some basic settings regarding the “send as PDF” – functionality ([see chapter 2.1.2.1](#)).



### Settings:

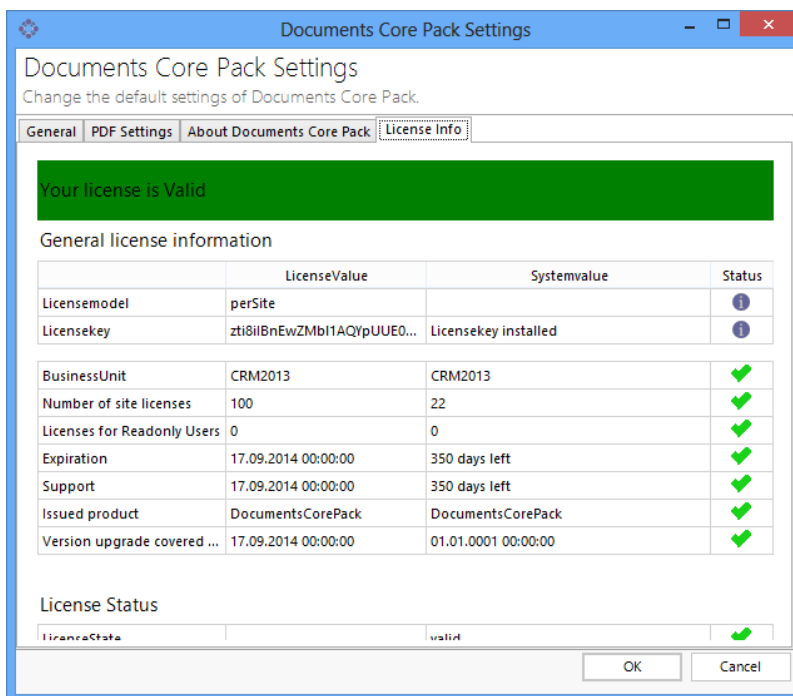
- PDF-Printer: defines the PDF-printer that should be used Supported printers:
  - Office 07 / 2010 – PDF-printer (default)
  - PDF Creator
- Delete PDF after attaching: Defines whether the temporarily locally saved PDF file should be deleted after attaching the PDF to the email activity.
- Attach document as PDF to the activity: By default, the document will be saved as a \*.doc – file when using “Create CRM activity”. This setting enables to save PDF files instead.
- Use “Send as PDF” with Outlook: If checked, the document generated by the “Send as PDF” – routine will be attached to an email in Outlook instead of an email-activity.

### 4.3 About Documents Core Pack – Tab



- **About Documents Core Pack** contains detailed information about the installed version and some facts about the currently used license.

### 4.4 License Info – Tab



- **License Info:** shows details about the license (validity, type, users) and some facts about the currently used license.

## 5 Administrator Section / High Qualified User

This section is only relevant for you if you are an administrator or if you already have experience with DCP. The specific options and settings that are of importance are explained here for you if you are only already familiar with all the standard settings of DCP client.

For further questions or if in doubt please do not hesitate to [contact us](#).

### 5.1 Configure Save-Location (SharePoint/File share Paths)

This chapter contains a detailed description about how to predefine SaveLocations for generated documents with the "Document Properties".

E.g. It is possible to define that a quote template should be automatically saved into the "Parent-customer"-share with the Quote-number as the filename.

The path to which merged documents are saved to depends on two settings:

- 1) DocumentsCorePack Server Configuration (Server)

Here it's possible to define root-paths for all entities. (e.g. contact, account)

So all documents created for the entity e.g. contact will be saved to the contact-root unless no subfolder is defined on the client side.

- 2) Document Properties (Client)

In the document properties of the template you can find a setting called "SubFolder Name" which allows you to specify a subfolder for the created document.

**Examples:**

1. We will create a gift certificate for a contact and save it to a new folder for the contact :

- Server-Settings

The gift certificate is a template for the contact entity, so the Fileshare/SharePoint –root will be taken from the depending server setting:

|            |        |   |  |
|------------|--------|---|--|
| Competitor | Folder | X | (default)                                  |
| Contact    | Folder | X | \\Dev-crm3\WordMailMergeDocuments\Contacts |
| Contract   | Folder | X | (default)                                  |

- Client-Settings:

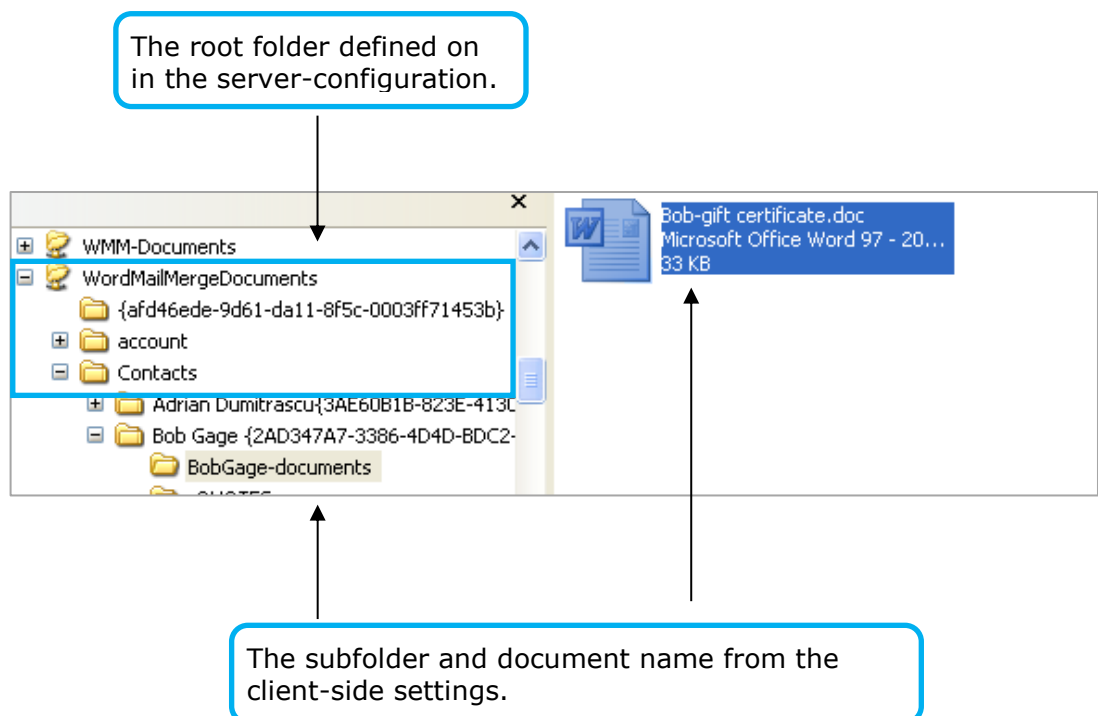
In the document-properties, we can define a subfolder-name and a document name for the created gift-certificate.

Document Name: <<firstname>>+'-Gift Certificate'

SubFolder Name: <<fullname>>+'-documents'

- Result:

The settings described above result in following document path on the fileshare:



2. We will generate a quote and save it to the PrimaryContact on the Fileshare.

- Server Settings:

As the document will be created for the entity "Contact", the root folder will be taken from the contact-settings rather than the quote-setting in the DocumentsCorePack server configuration.

|            |        |   |  |
|------------|--------|---|--|
| Competitor | Folder | X | (default)                                  |
| Contact    | Folder | X | \\Dev-crm3\WordMailMergeDocuments\Contacts |
| Contact    | Folder | Y | (default)                                  |

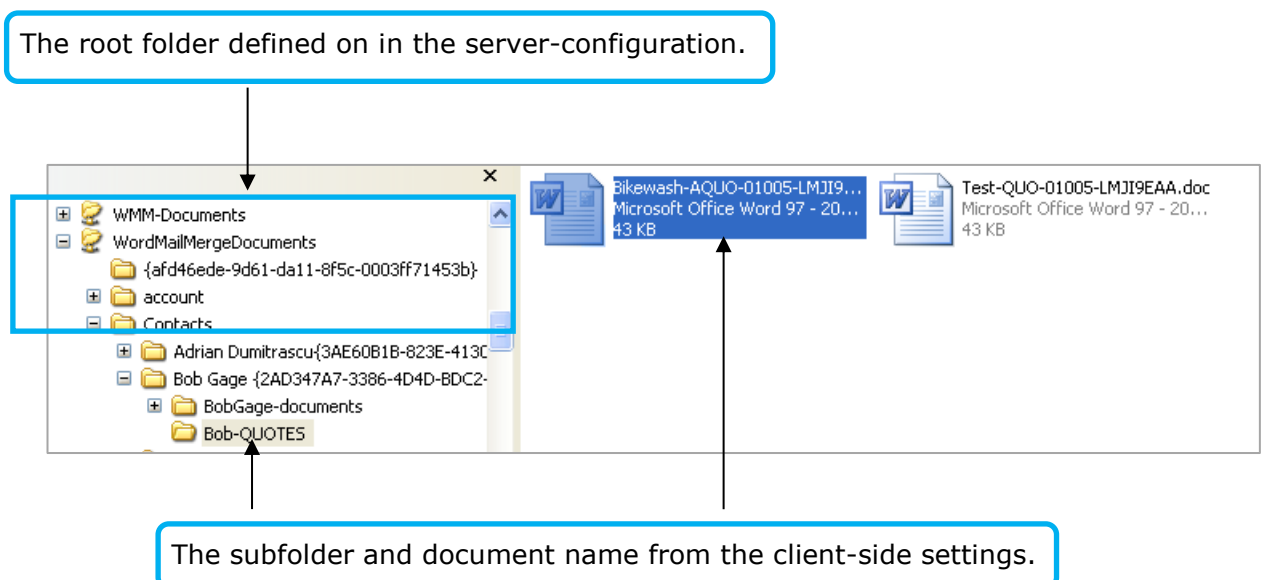
- Document Properties:

In this case we have to use the "Create Activities for" –option as the quote should not be saved to the quote-folder.

Therefore, the client side settings have to look like this:

|                      |  |     |
|----------------------|--|-----|
| CreateActivitiesfor: | contact.customerid_contact_contactid       | ... |
| Document Name:       | <<name>>+''+<<quotenumber>>                | ... |
| SubFolder Name:      | <<customerid_contact_firstname>>+'-QUOTES' | ... |

- Result:





## 5.2 Resolve an additional Relationship

In the following chapters will be introduced how you can resolve a new entity and how you can use them. If you do don't understand a term, an explanation or a technical term, please refer to [Glossary](#).

### 5.2.1 "Office Open XML (.docx)"

This Explanations are just for .docx Templates. For a simple elucidation please check [3.1.2.2.1 Add a new Entity](#).

#### 5.2.1.1 Resolve an additional Relationship - Step by Step

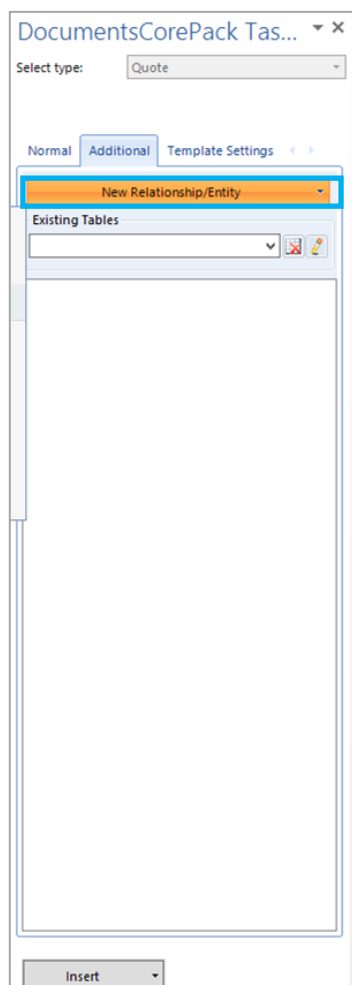
This feature enables you to easily resolve Relationships into your documents. The functionality is able to access to all the entities in your CRM. Furthermore, it is possible to resolve 1:n, n:1, n:n and n:m cardinalities.

#### Step by Step

Here we need a new or a previously created template, follow the next steps to resolve an additional relationship. In our Case we want to create a template with a product table.

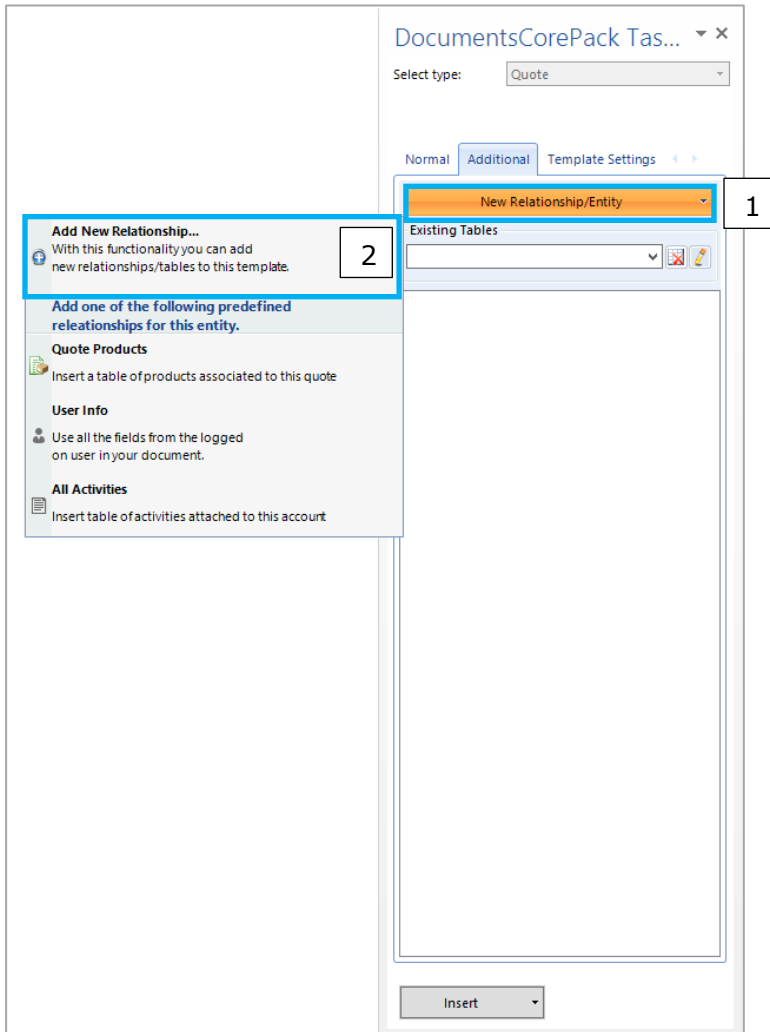
#### Step 1: Task Pane

Open the DocumentsCorePack Task Pane and click on "Additional".  
(Marked in the red square)

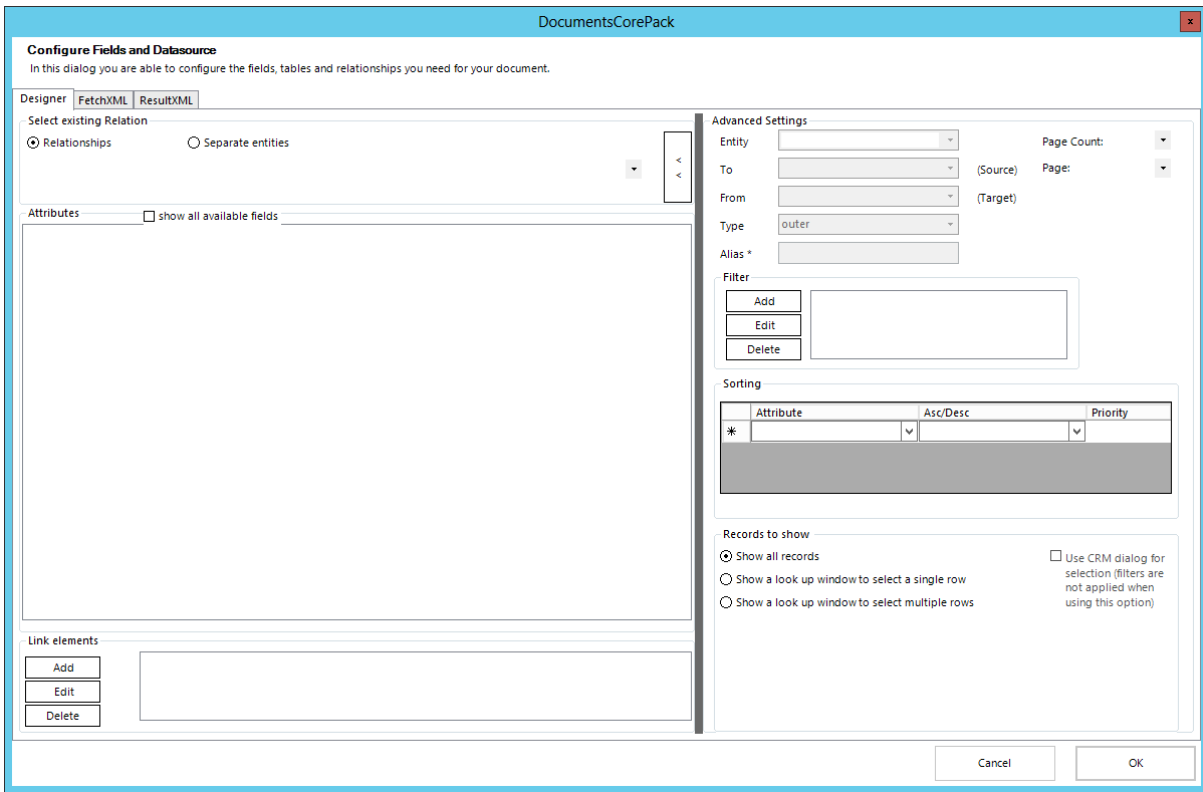


## Step 2: Add Relationship Table

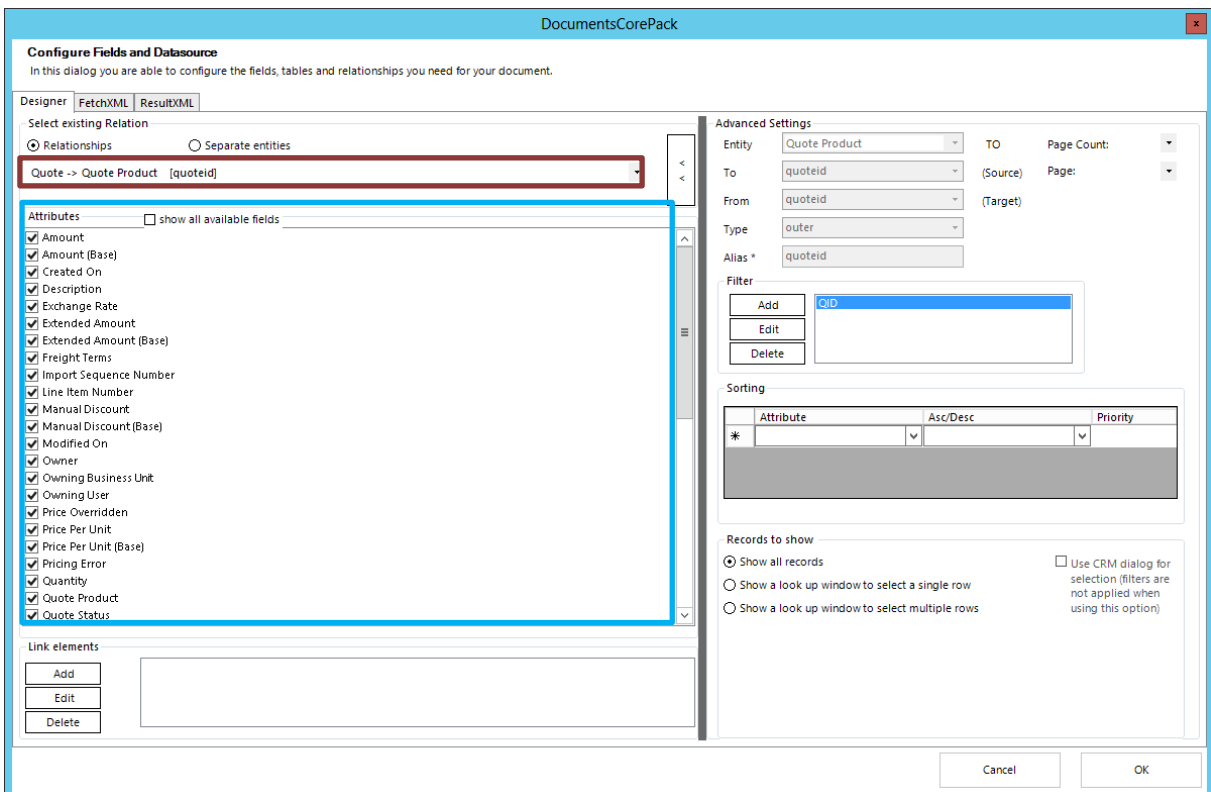
Click at the **[Add new Relationship/Entity]**-Button - **[1]** and then press **[Add new Relationship...]** - **[2]**



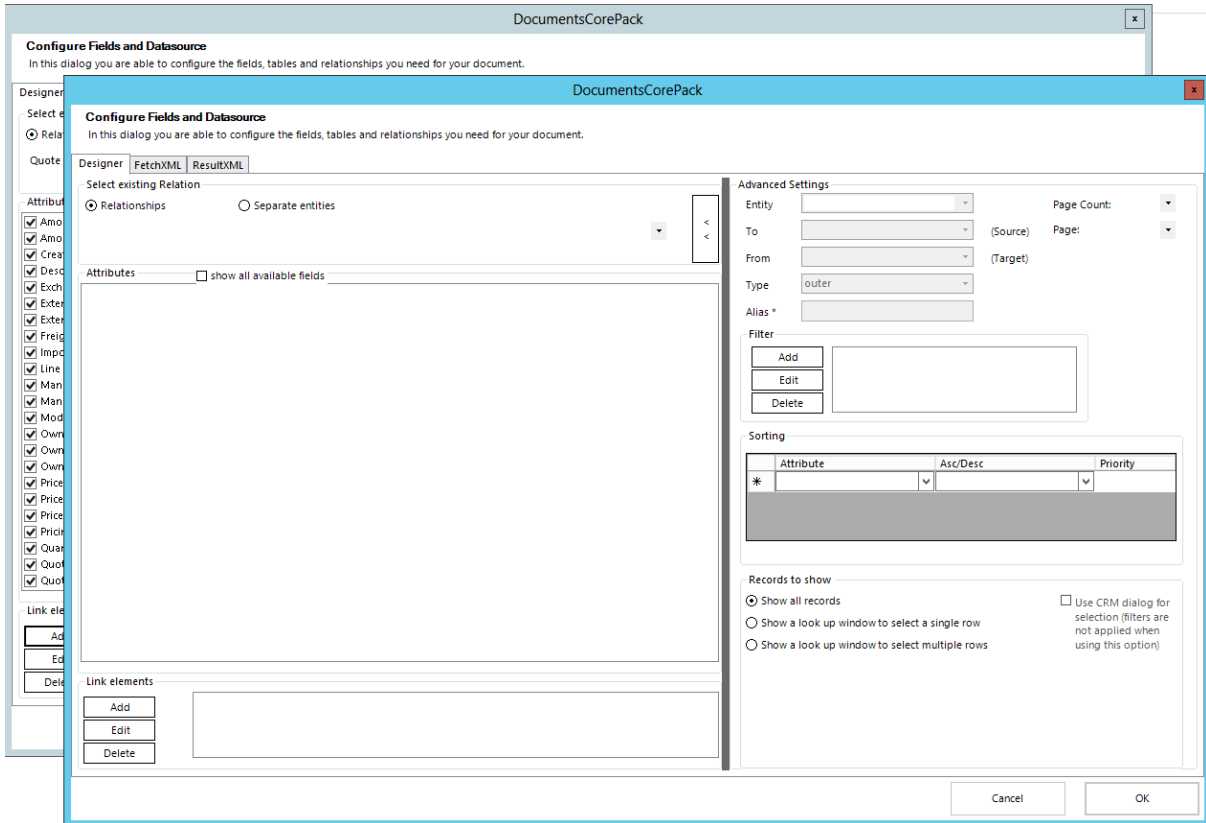
After these steps the following window appears...



Choose "Quote => Quote Product" (1:n) in the dropdown (Red Square) to get all Fields from Quote Product. Now select all Fields you need for your Template (Blue Square).



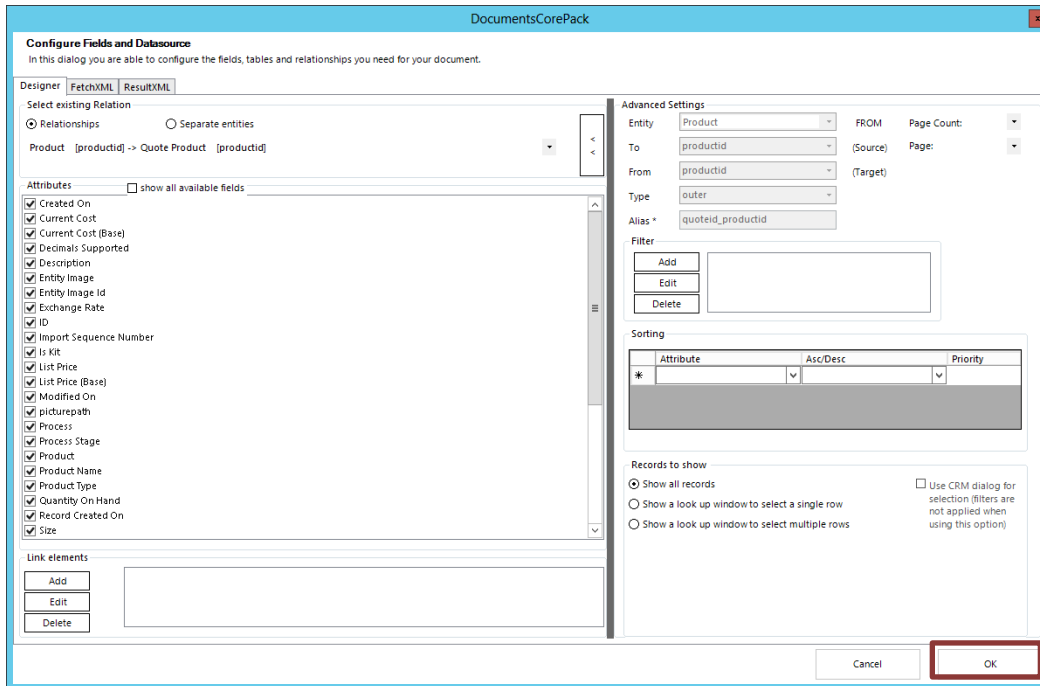
After you did your necessary field selection click the [Add] – Button. At this point we have access to all Field from “Quote Product” but we want the Fields from “Product” too. So click [Add] and another Form will open.



At this Time we are able to add the further relationship “Product => Quote Product” (n:1).

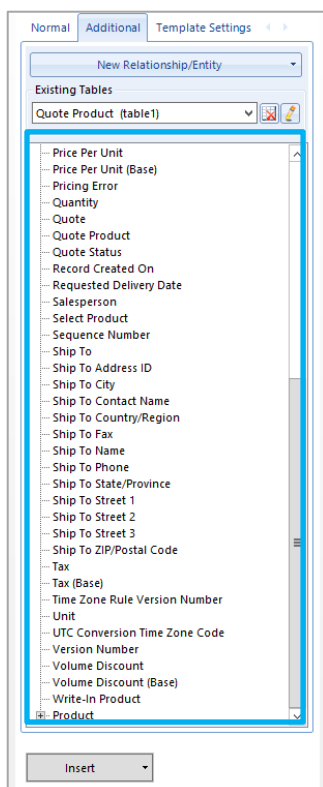
### Step 4: Accept the Entities

Now we have set all our Relationship and have to accept them, we are doing this by click at the [OK]-Button.



### Step 5: The Result

Now all our selected Fields are available in the DCP TaskPane Tree



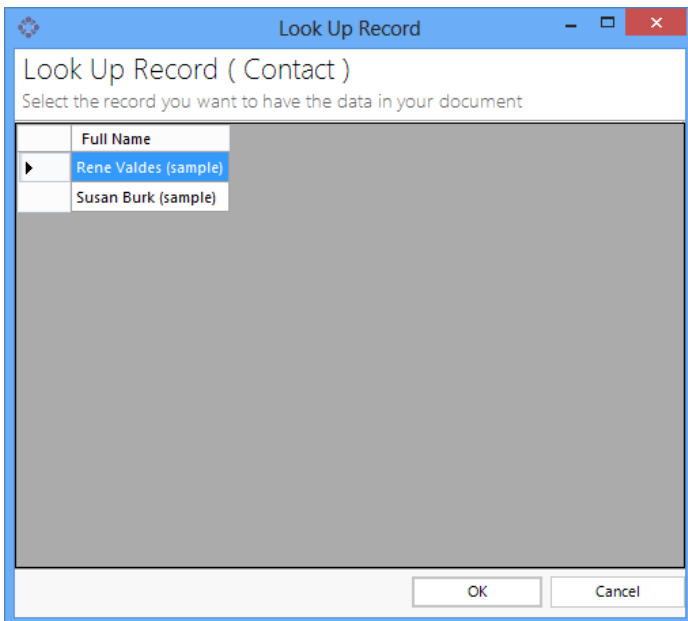
5.2.1.2 How to pre-filter result rows before generating a document

We have created a new function offering the possibility to use a dialog to pre-filter the result rows. This will be helpful when the user needs to select a specific related entity (e.g. contact ...) before starting to generate the document.

This feature is available with version 5.26 upwards and only for DOCX-templates.

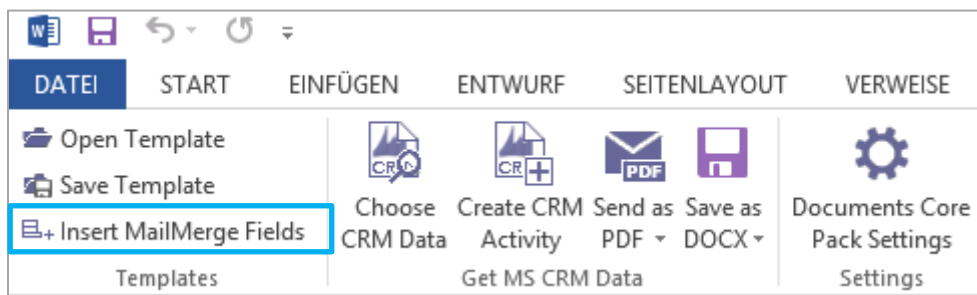
After the configuration steps described below, the users will get a "Look Up Record"-window (e.g. like the one in the screenshot below) when opening the DocX-template. In this window, they can choose one or more of the pre-filtered records and afterwards start to generate the document.

In the example shown in the following screenshot, users can select one or more contact(s) of an account. Afterwards, they are able to generate the documents with the selected contact(s).

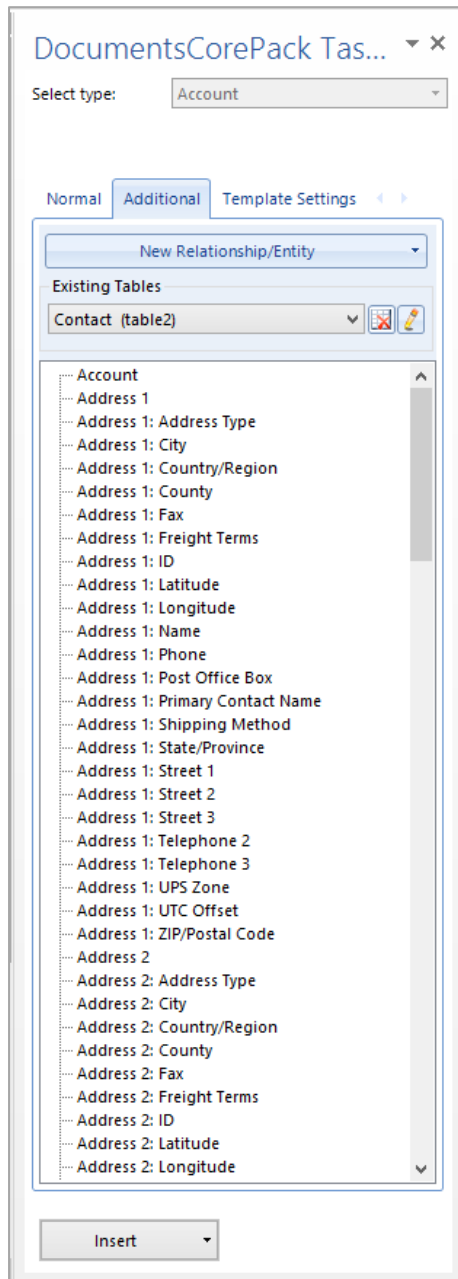


**How to set this up in the template:**

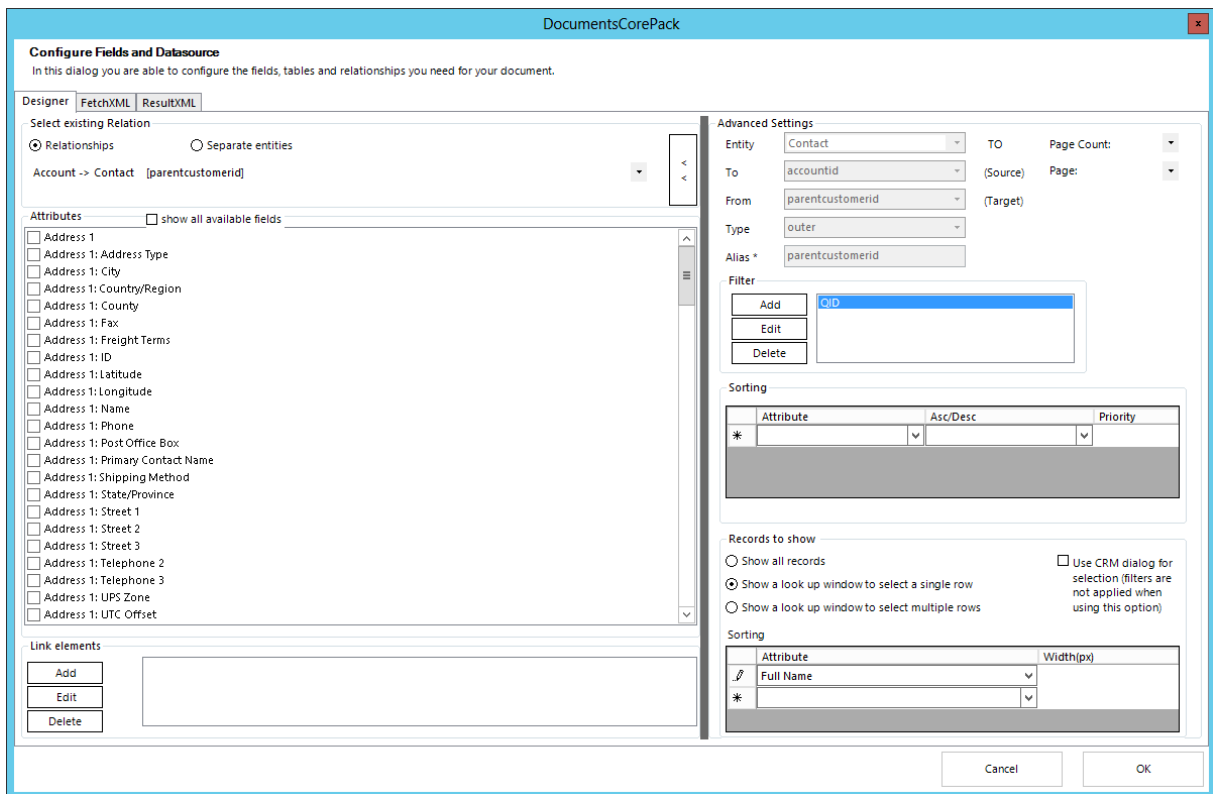
First, you have to open the template and to click on "Insert MailMerge Fields".



Go to the additional tab, select a relationship and click on the "edit"-button. This is the base for the filtering process.



In the "Records to Show"-section of the window you can choose if you want a selection and which type.



The "column order"-section enables you determine the order and the width of the columns within this lookup window.



## 5.2.2 "Deprecated Word Standard (.dot)"

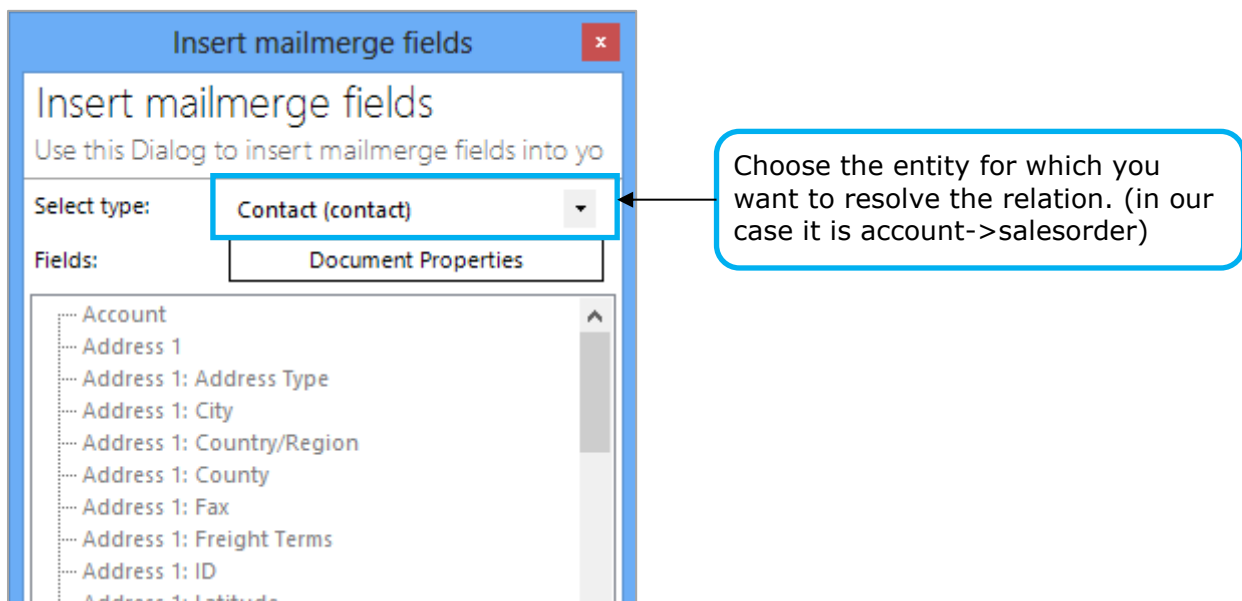
The following Instructions are just for .dot Templates. For a simple declaration please check [3.1.2.2.1 Add a new Entity](#).

### 5.2.2.1 Resolve an additional Relationship - Step by Step

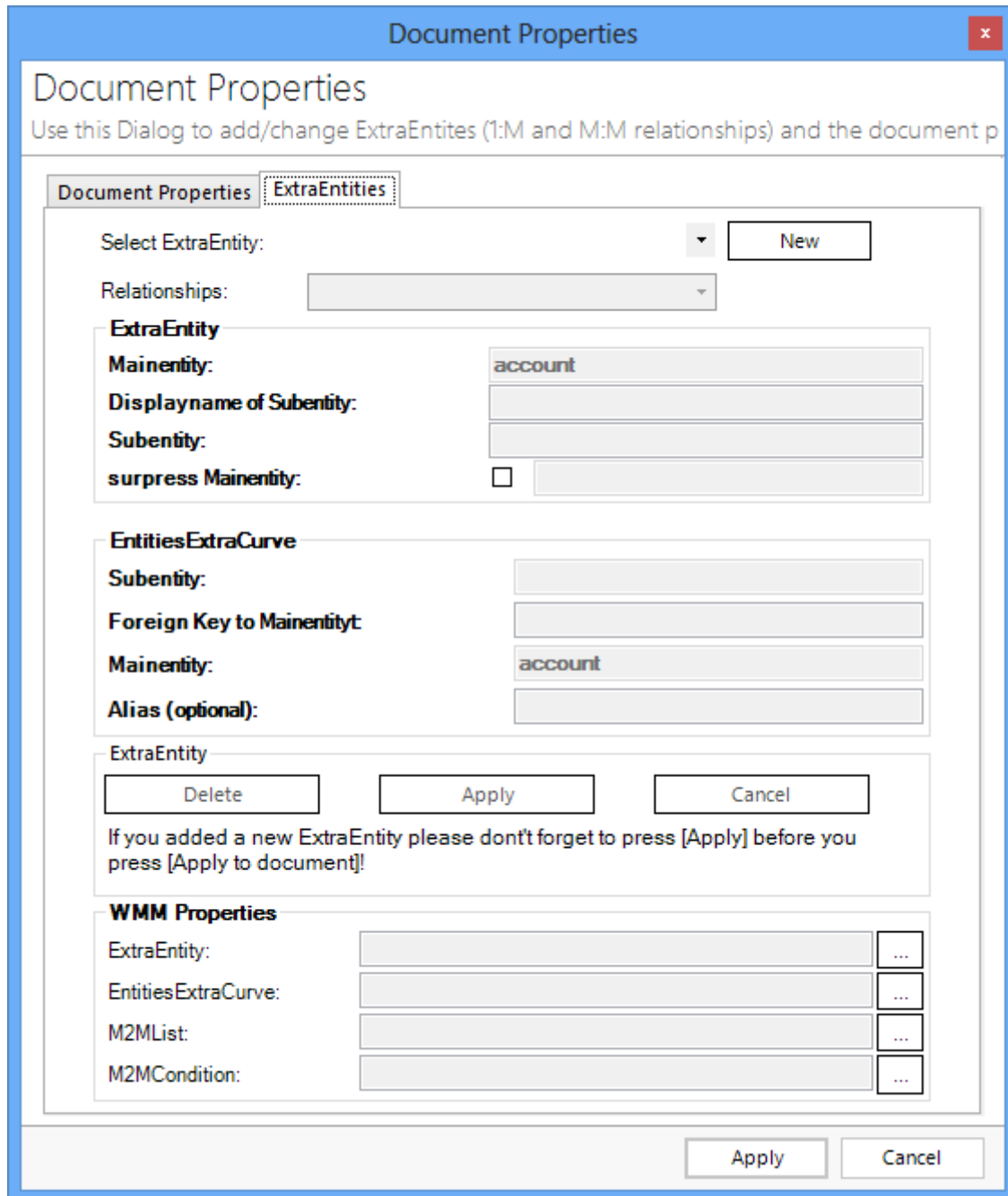
With the option to define "One to Many" and "Many to Many" relationships it is possible to link entities together and load data from both into the MS Word-document.

In our example we define a relationship which allows us get all orders that are saved for an account.

**Step 1:** First, you have to click on "DocumentsCorePack for MS CRM"->"InsertMailMerge fields" and choose the entity you want to define a relationship for.



**Step 2:** After that, we proceed with a click on „Document Properties” and switch to the „Extra Entity tab”.



**Document Properties**

Use this Dialog to add/change ExtraEntites (1:M and M:M relationships) and the document p

Document Properties **ExtraEntities**

Select ExtraEntity:

Relationships:

**ExtraEntity**

Mainentity:

Displayname of Subentity:

Subentity:

surpress Mainentity:

**EntitiesExtraCurve**

Subentity:

Foreign Key to Mainentity:

Mainentity:

Alias (optional):

ExtraEntity

If you added a new ExtraEntity please don't forget to press [Apply] before you press [Apply to document]!

**WMM Properties**

ExtraEntity:

EntitiesExtraCurve:

M2MList:

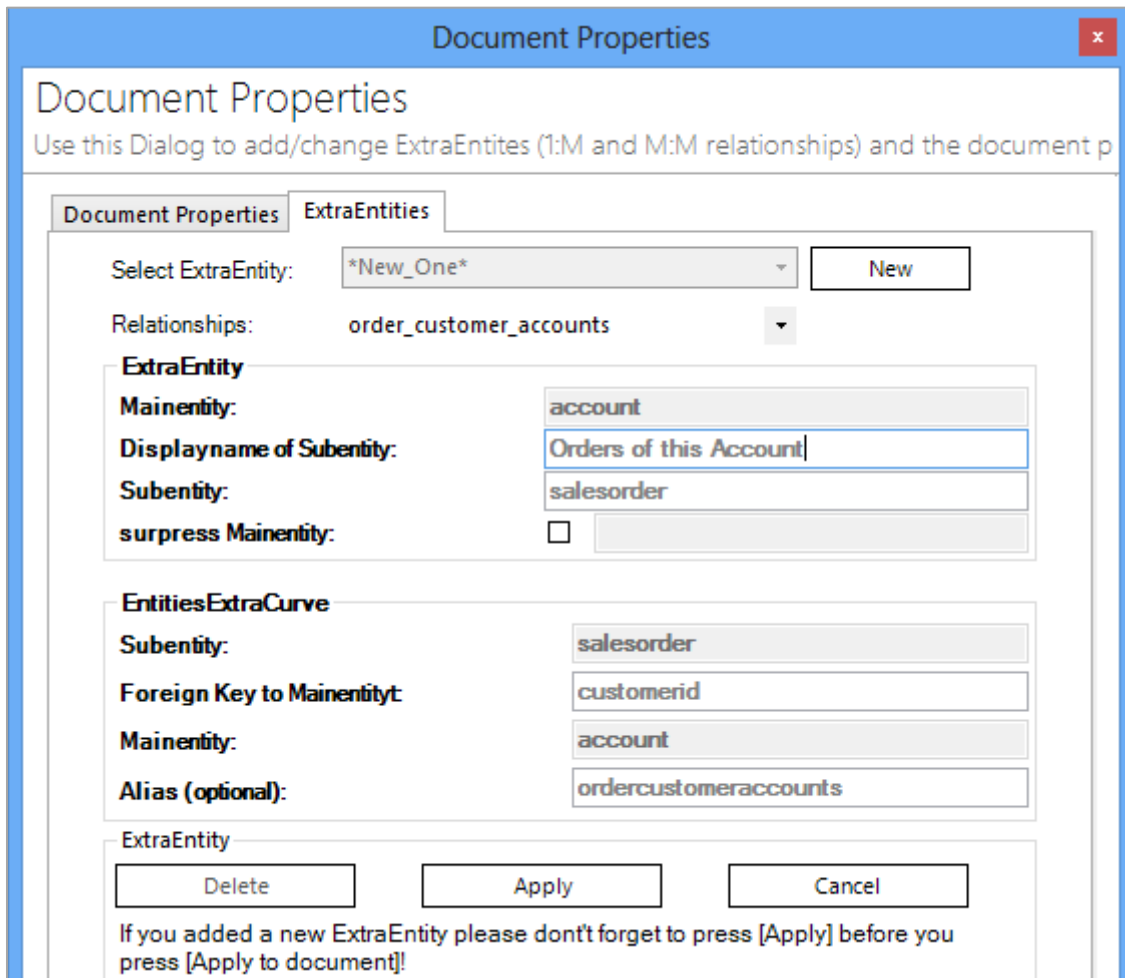
M2MCondition:

To add a new relation, we need to choose the entity/relation we want to add. Therefore, we proceed with a click on "New".

You are now in the "edit-mode". This means that the tree button [Delete], [Apply] and [Cancel], as well as some of the form fields are active and we can start defining the account->order relationship.

**Step 3:** Choose relation

The combobox allows choosing any relation defined within MS CRM.



**Document Properties**

Use this Dialog to add/change ExtraEntites (1:M and M:M relationships) and the document p

Document Properties | **ExtraEntities**

Select ExtraEntity: \*New\_One\* [New]

Relationships: order\_customer\_accounts

**ExtraEntity**

Mainentity: account

Displayname of Subentity: Orders of this Account

Subentity: salesorder

surpress Mainentity:

**EntitiesExtraCurve**

Subentity: salesorder

Foreign Key to Mainentity: customerid

Mainentity: account

Alias (optional): ordercustomeraccounts

ExtraEntity

Delete Apply Cancel

If you added a new ExtraEntity please don't forget to press [Apply] before you press [Apply to document]!

Most of the fields are filled automatically. All we have to do is to add a DisplayName for the new relation. In our example this is "Orders of this account".

**Step 4:** After filling all fields we can proceed with a click on "Apply" and finally „Apply“ all relations and properties to the Word-document.

Now we can see a new entity "Orders of this account" in the list of the available fields for entity account and therefore use it to load data of the orders into the template.

## 5.3 Advanced Settings

Enter into any advanced settings for all the options deeper into the CRM.

For the users with less experience in CRM settings should advise there Administrator for these settings.

### 5.3.1 How to filter group-templates

This feature offers the possibility to set a filter for DocumentsCorePack templates. Templates are filtered based on the template-group they are assigned to. Applying this One single template-group. This prevents users from getting confused by a variety of available templates as they can only see and select templates of the corresponding template-group defined by the applied filter.

#### **Specification**

DocumentsCorePack templates can be organized in groups. These groups are shown as separate tabs in the "Open Template" dialog and are also available as sub-items in the generate document button.

To improve the DocumentsCorePack-usability for end-users, you can set a filter for these template-groups in the DocumentsCorePack server configuration. Applying this filter limits the available templates in the template selection menu of a CRM record to just one specific template.

Therefore, users do not get confused with a variety of available templates as they can only see and select templates of the corresponding template-group defined by the applied filter.

The following paragraph describes how to configure this feature.

**ATTENTION:** This feature only works for single records and is not enabled for bulk merges of documents as different records can have different filter criteria!

## Configuration

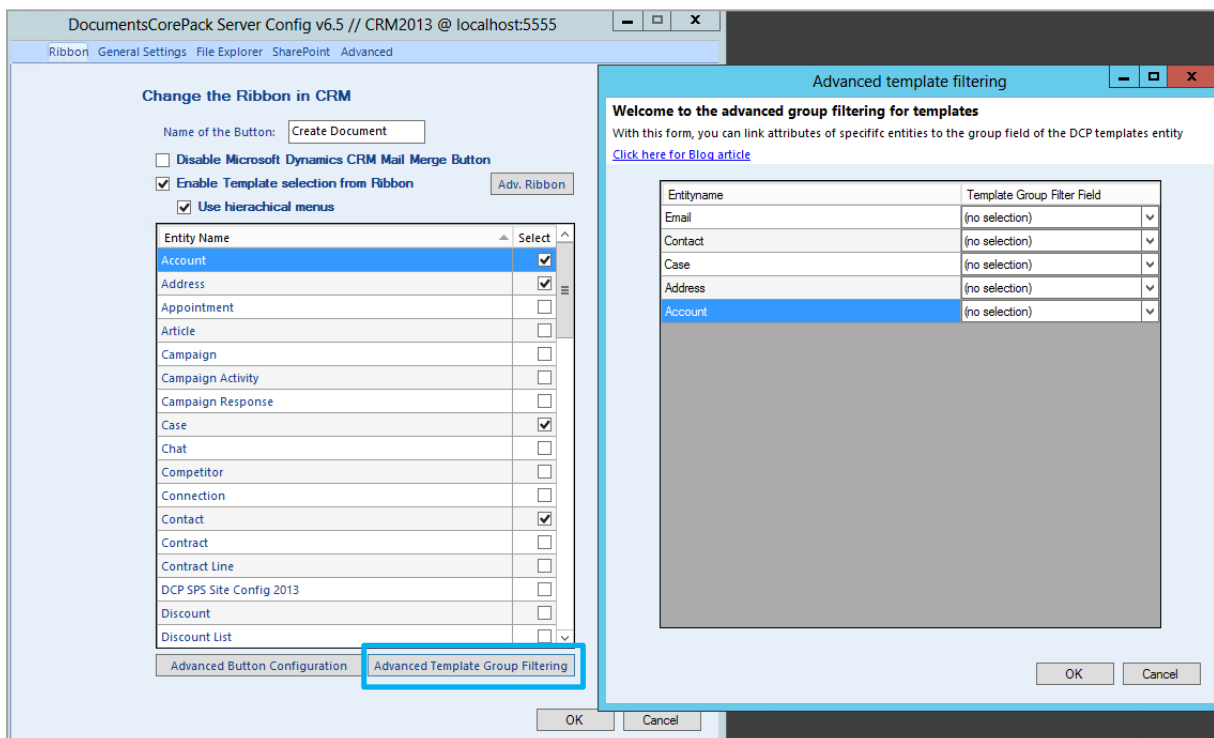
Start the DocumentsCorePack Server Configuration Tool and click on the additional button below the Create Document entity selection window which is named "Advanced Template Group Filtering" (see screenshot below).

After clicking on this button, a new window opens. This window displays all entities that have been configured to show the "Create Document"-button.

Here, you have the possibility to configure the feature for the template-group filtering. To do so, select the entity that should be used to filter the template-groups. After that, choose a text attribute of the selected entity. e.g. The configuration shown in the screenshot below enables the filtering process for the "Account" entity based on the value of the attribute "GroupFilterText" which is defined within each CRM record individually. This example corresponds to the result in the specification section above.

If you look at the first two screenshots of this chapter, you can see that you can define which template-group should be displayed within accounts. In our example, we defined to only display templates of the template-group 'Group B' for the account 'MSCRM-ADDONS'. Therefore, we typed in 'Group B' within the 'GroupFilterText'-field within this account.

After saving the changes and when opening the "Create Document" flyout button within this record next time, only templates of the group 'Group B' will be displayed (as shown in screenshot 2).



### 5.3.2 How to filter linked entities during a merge process

It is possible to filter the linked entities of a 1:N and a N:N relationship during the merge process based on their IDs. This works in combination with DocumentsCorePack and AutoMerge but only with "docx"-templates.

To achieve this, you have to create a new record of the "MSCRM-ADDONS.com User/Temp Settings" entity containing a filter.

#### Name

Use the "Name"-field to define for which user, entity type and record ID the filter should be used.

- **Structure:** AMPreFilter|<<ID of the user who should use the filter>>|<<the logical name of the starting entity of the template>>|<<ID of the record (of template starting entity) for which the filter should be used>>|<<logical name of the linked entity which should be filtered>>|
- **Example:** AMPreFilter{|DC9B80F8-C781-46D8-9FD6-A3B610836975}|account{|7b069E5412-84F6-E111-977B-00155DC8AE09}|contact|

#### Value

Use the "Value"-field to define the IDs of the linked records which should be shown in the template.

- **Structure:**  
 <filter>  
 <entity><<logical name of the linked entity which should be filtered>></entity>  
 <values>  
 <value><<ID of linked record which should be shown>></value>  
 <value><<ID of linked record which should be shown>></value>  
 .....  
 </values>  
 </filter>
- **Example:**  
 <filter>  
 <entity>contact</entity>  
 <values>  
 <value>{12E5214A-88BF-E111-A7C1-00155DC8AE09}</value>  
 <value>{12E5214A-88BF-E111-A7C1-00155DC8AE09}</value>  
 </values>  
 </filter>

#### **Important: The IDs must be in upper case and must contain brackets.**

During each merge process of "docx"-templates, the DocumentsCorePack Client or the AutoMerge add-on looks for a suitable filter. If such a filter is found, only linked records with a matching ID will be shown. The filter gets delete afterwards. Otherwise, the usual merge process remains unchanged.

**Example**

Here you can see an account named "A Bike Store". It has several contacts related.

ACCOUNT : INFORMATION

## A Bike Store

Contact Associated View ▾

+ ADD NEW CONTACT  
 + ADD EXISTING CONTACT  
 ✕ BULK DELETE  
 📊 CHART PANE ▾  
 📄 RUN REPORT ▾  
 ...

| ✓   Full Name ↑ | Business Phone |
|-----------------|----------------|
| Herbert Domer   | 555-0135       |
| Michael Dohr    | 555-0137       |
| Michael Ormigg  | 555-0136       |

By using the following filter, only contacts which match the GUIDs in the filter will be shown in the result document. The defined user-GUID and the user running must match as well.

```
AMPreFilter[|C9D75E9F-1336-E111-945B-00155DCBAE09|]account[|BD917846-5CAE-E111-BA50-00155DCBAE09|]contact[|FE6A9F9C-57C4-E111-A7C1-00155DCBAE09|]
<filter> <entity>new_personaldispo</entity> <values> <value>[12E5214A-88BF-E111-A7C1-00155DCBAE09]</value> <value>[00689F9C-57C4-E111-A7C1-00155DCBAE09]</value> </values> </filter>
```

---

## 6 Contact

If you have questions to the product send an Email to

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

Or visit our blog

<http://blogs.mscrm-addons.com>

PTM EDV-Systeme GmbH

Bahnhofgürtel 59

A-8020 Graz, Austria

Tel US +1 404.720.6066

Tel Austria +43 316 680-880-0

Fax +43 316 680-880-25

[www.ptm-edv.at](http://www.ptm-edv.at)

[www.mscrm-addons.com](http://www.mscrm-addons.com)