



AutoMerge for MS CRM 4

Version 4.0(server)

Implementation Guide (How to install/uninstall,..)

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1 Installation of AutoMerge

Before installing AutoMerge, please read this document and follow the steps carefully.

Intended Audience

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

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

The installation consists of the following steps:

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

1. Installing the server components of AutoMerge
2. Configure the Service User
3. Configuring the CRM Workflows
4. Installing DocumentsCorePack Client (required Version: 4.42 or higher)

1.1 *Installing the server component*

The server component of AutoMerge provides you with the capability to start a mail merge from a workflow.

The AutoMerge Component can be installed on a machine in the same domain or outside the domain (tested with Windows XP, Windows Vista x86 and Windows Vista x64).

Recommended solution: Setting up a Virtual PC (hosting Windows XP or Vista) that runs AutoMerge only.

It is not recommended to install it on the CRM server itself.

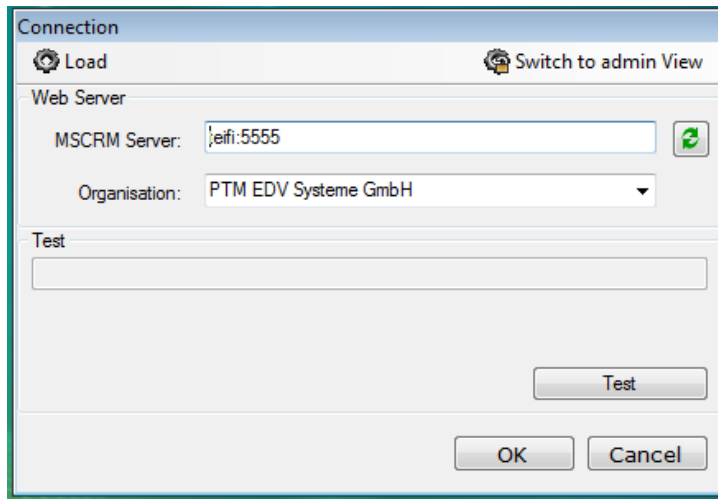
Please note that you can install AutoMerge only on one machine for each Organization.

AutoMerge can basically be used in two ways:

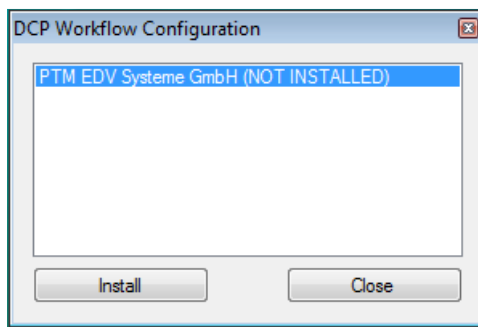
- **AutoMerge in combination with DocumentsCorePack:** DCP can be extended with AutoMerge. Templates can be defined and configured on every client and provides the possibility to use DCP features like SharePoint or FileExplorer integration.
- **AutoMerge without DCP (standalone):** AutoMerge can be used without DCP too. The DocumentsCorePack Client will only work on the machine where AutoMerge is installed. Therefore, templates can be defined and configured on this machine only.

- **The Installation Process**

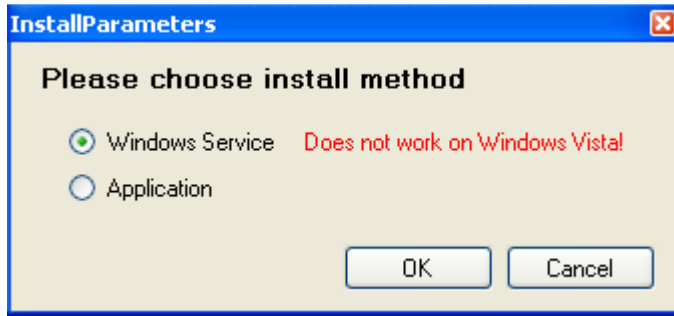
1. Extract the DCPWorkflowComponent.zip to any location you want. Recommended is "C:\Program Files\PTM EDV-Systeme GmbH\AutoMerge for MS CRM 4.0".
2. Start the DCPWorkflowClientSetup.exe and then you'll have to enter the name of the CRM-Server on the following screen. Don't forget the portnumber if it's not 80 (e.g. servername: teifi, port: 5555)



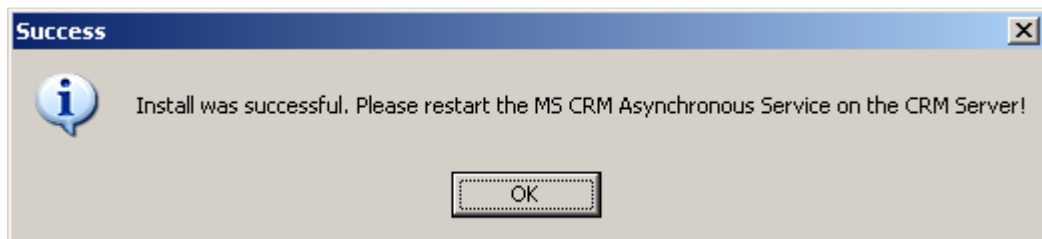
3. After that you'll see a list of all organizations on this CRM Server. In brackets you see if you have installed AutoMerge on this organization. Please select a organization and click on "Install"



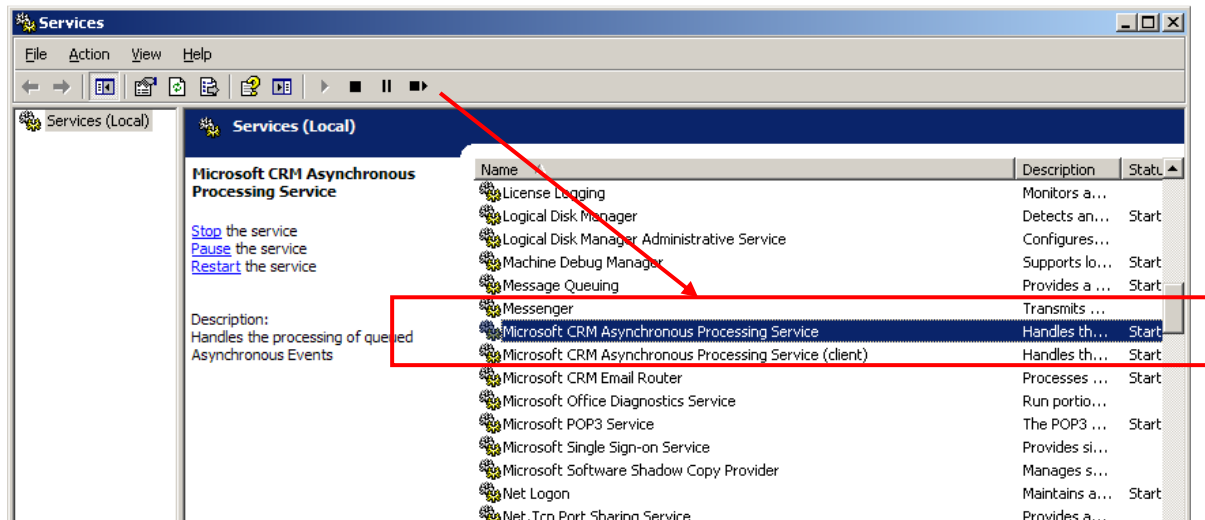
4. You'll be prompted by following screen. You have to choose either to install AutoMerge as Windows Service or as an Application. The Windows Service does not work on Windows Vista. When you install AutoMerge as a Service, AutoMerge will work if no one is logged on to the machine. Also there is the possibility to work with DocumentsCorePack on this machine while the AutoMerge Service is running. The application only runs when you're logged on to the machine because the application is started during the logon. Also it is not recommended to work with DocumentsCorePack while AutoMerge is running.



After installing the Addon, following window, asking to restart the CRM Asynchronous Service, appears:



Therefore, Open the services (e.g Start->Administrative Tools->Services) on the CRM server and restart the "Microsoft CRM Asynchronous Processing Service"

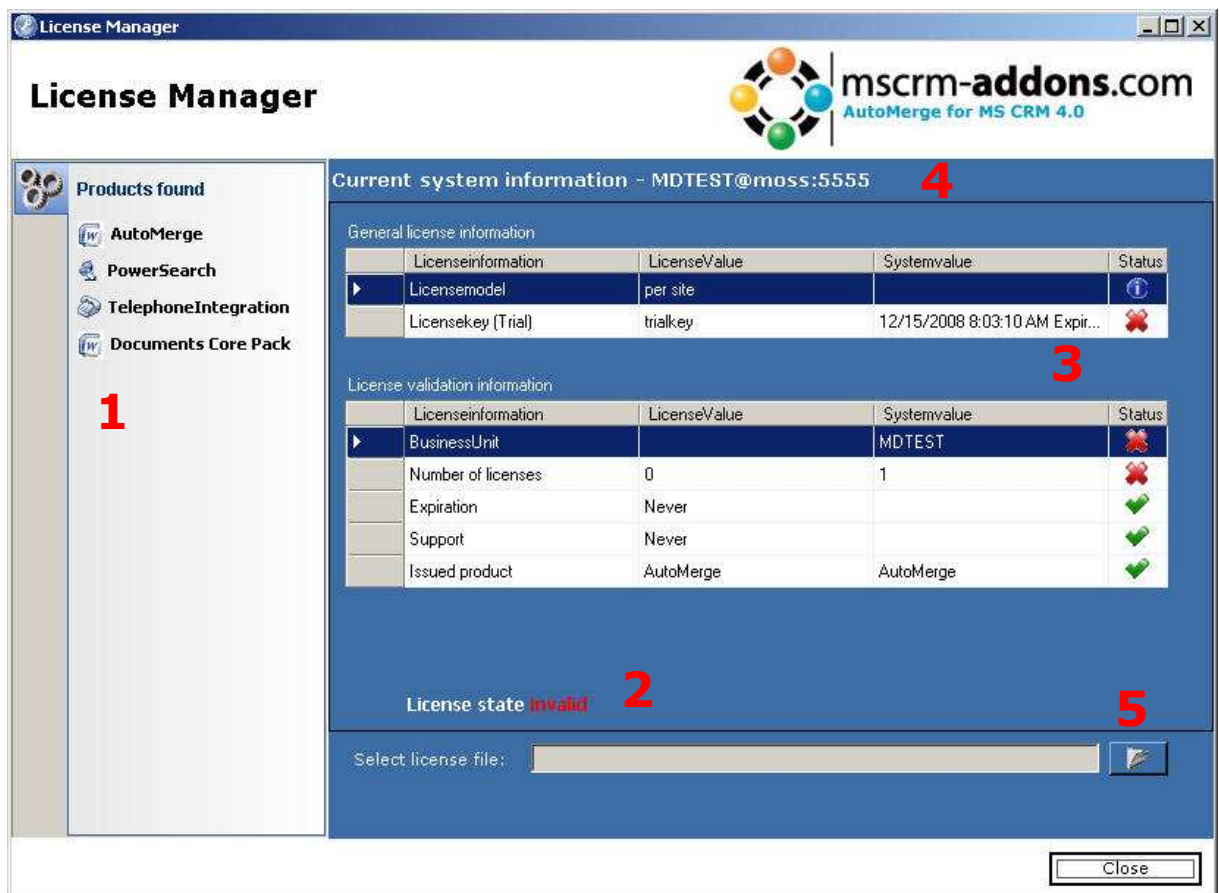


1.2 Install the License

In the .zip file you've extracted, you'll also find the LicenseManager to install your license for AutoMerge. Double-click the file "PTM.LicenseManager.exe" to start the License-Manager.

Important: After you've installed the license, you have to restart the Windows Service "DCP Workflow Service" when you installed AutoMerge as a service. When you've installed it as an application, close the DCP Workflow Application in the taskbar and restart DCPWorkflowApplication.exe from the installation directory.

1.2.1 License Manager-Main window

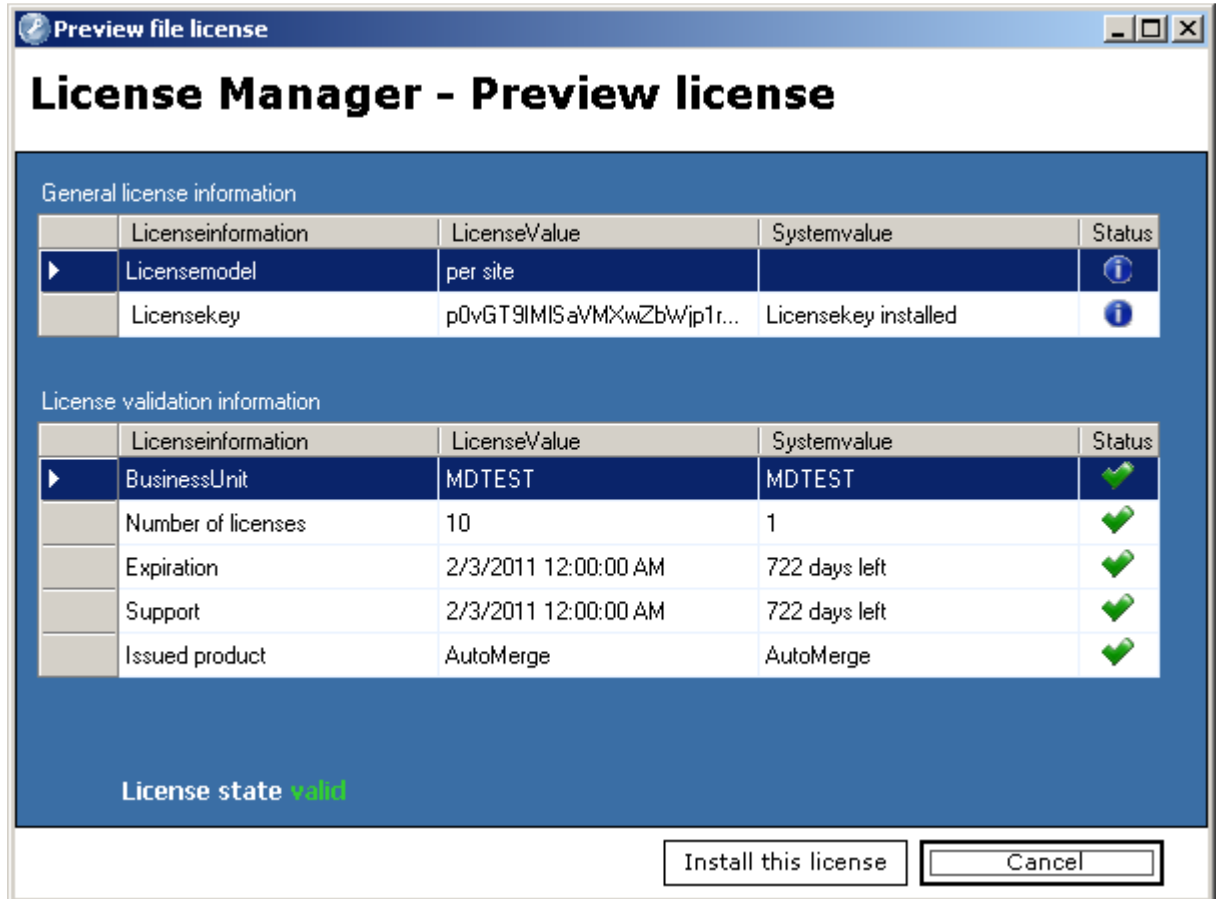


Explanation:

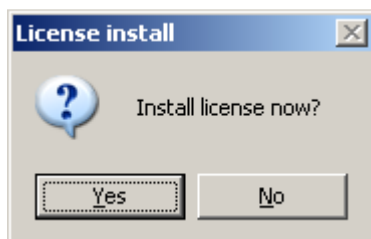
- (1) This lists all your installed products, which have been identified by the License Manager.
- (2) Your current license state concerning the selected product depending on (3)
- (3) Displays detailed information about the current license state
- (4) Displays the selected product and the CRM Organisation
- (5) Provides a FileOpen-dialogue to choose the license file that should be installed

1.2.2 Selecting the license file

After selecting the license file (5), a Preview comes up, displaying detailed information about the license and whether it fits with your system or not.

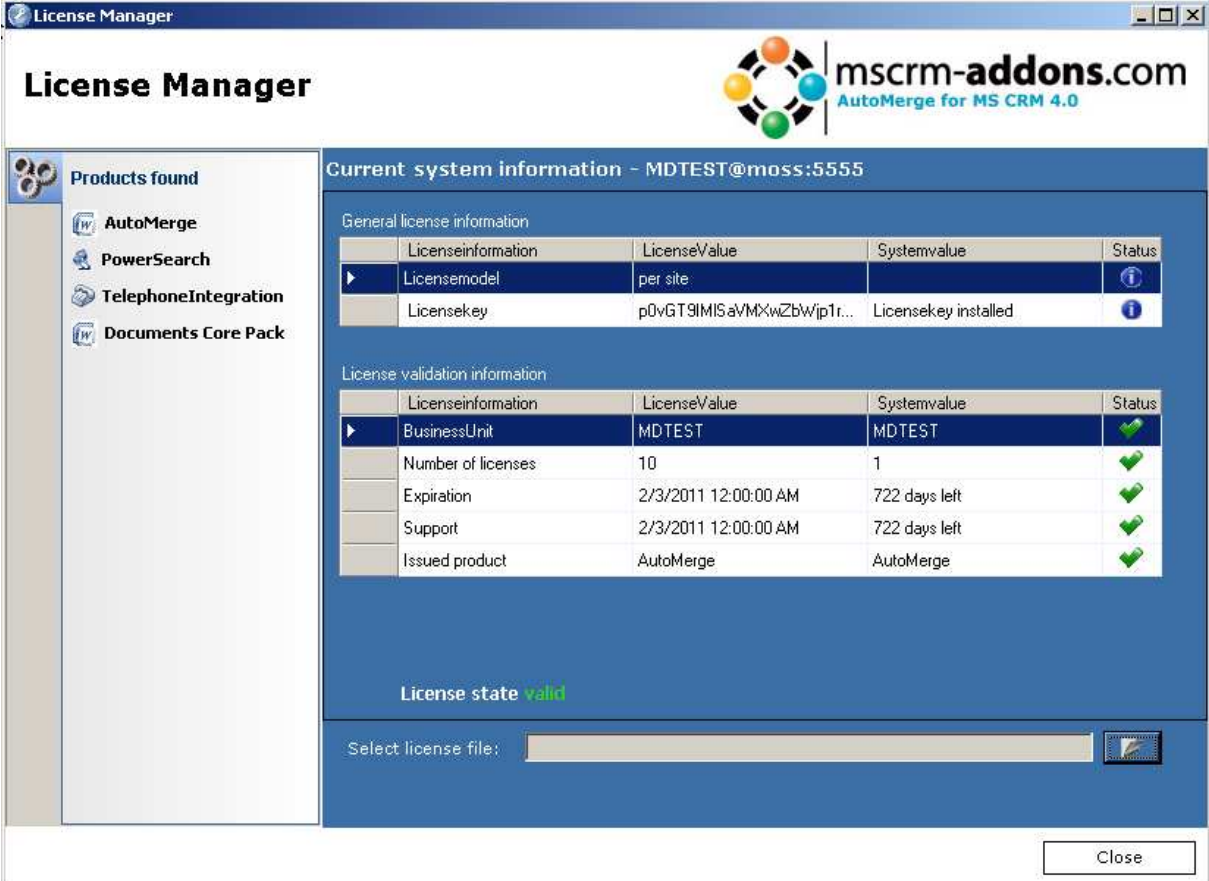


When everything is ok, you can proceed by clicking on [Install this license]. A final confirmation window comes up.



1.2.3 License installed

The license-info is overtaken to the License manager –main window. All details about the license (e.g. maintenance end-date number of licenses,...) show up in the detail section (3)



The screenshot shows the License Manager application window. The title bar reads "License Manager". The main header area contains the "License Manager" title and the "mscrm-addons.com AutoMerge for MS CRM 4.0" logo. On the left, a sidebar lists "Products found" with icons for AutoMerge, PowerSearch, TelephoneIntegration, and Documents Core Pack. The main content area is titled "Current system information - MDTEST@moss:5555" and is divided into two sections: "General license information" and "License validation information".

General license information

Licenseinformation	LicenseValue	Systemvalue	Status
Licensemodel	per site		
Licensekey	p0vGT9IMISaVMXwZbw/p1r...	Licensekey installed	

License validation information

Licenseinformation	LicenseValue	Systemvalue	Status
BusinessUnit	MDTEST	MDTEST	
Number of licenses	10	1	
Expiration	2/3/2011 12:00:00 AM	722 days left	
Support	2/3/2011 12:00:00 AM	722 days left	
Issued product	AutoMerge	AutoMerge	

Below the tables, the text "License state valid" is displayed in green. At the bottom, there is a "Select license file:" label followed by a text input field and a "Browse" button. A "Close" button is located in the bottom right corner of the window.

ATTENTION: The application will also install invalid licenses.

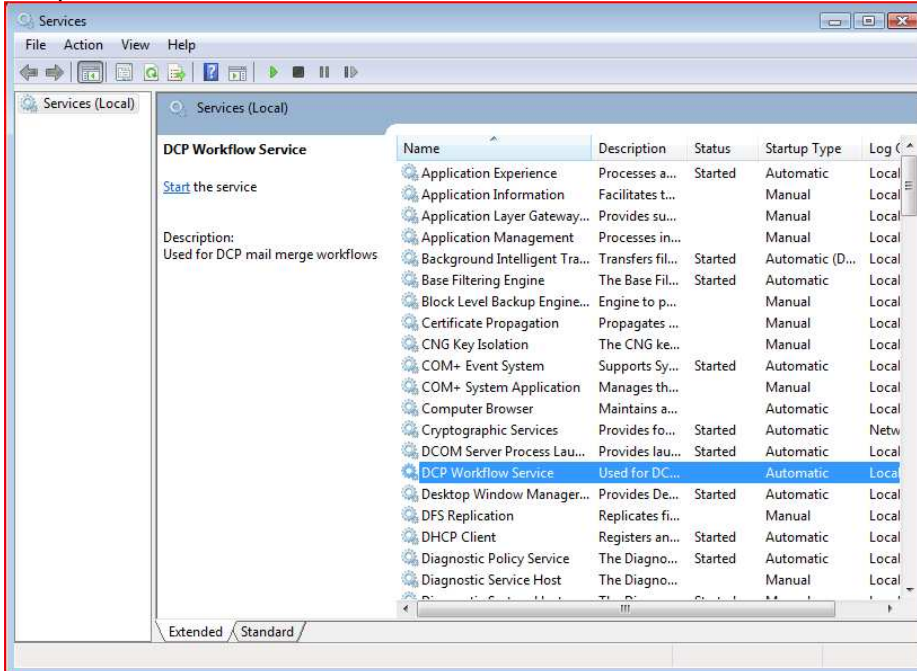
The current license information is updated and displays the License information. This should now be the same as in the license preview window.

1.3 Configure the Service User

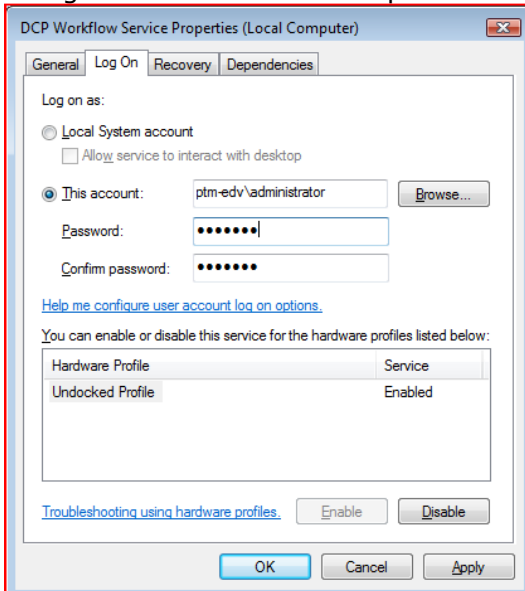
You have to do this step only, when you've installed AutoMerge as a service.

If you have not specified a user for the CRM connection profile, you will have to configure a user for the Windows Service which is processing the Workflows.

1. Open the Windows Services and find the "DCP Workflow Service"



2. Right-click and select "Properties". Then go to the tab "Log On"



On this screen you have to specify a user account which is a enabled CRM user and also have rights on this machine to run a mail merge. It's also recommended to use a user, that has privileges over all entities on a organization based level. Click on "OK" to save the settings.

After you have finished the configuration of the DCP Client you have to start the Windows Service. AutoMerge will not work if this service is not running.

1.4 Installing the client component :

Required DCP-client-version: 4.42 or higher

1.4.1 Prerequisites

Setting Internet Explorer Security, to enable mail merge from the CRM web client
The tasks below are done on each client machine or on the terminal server.

Documents Core Pack will run under the standard security settings pre-defined for the zone "Trusted sites", however as part of the Internet Explorer security, you will be prompted if you want to activate the Documents Core Pack ActiveX add-in.

In order to run Documents Core Pack without being prompted, follow the steps below.

First, you need to check what Security Zone the CRM system runs in, on the client machine.

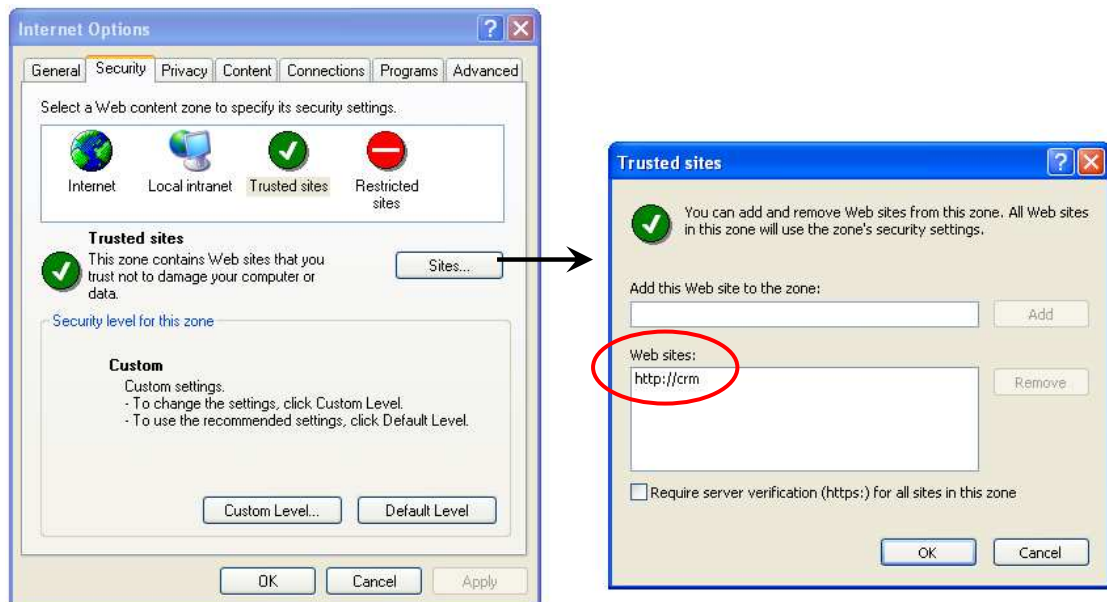
To complete this task, do the following:

1. Start Internet Explorer
2. Type the CRM Server address in the "Address Bar"
3. Check the Zone Setting on the right side of the Internet Explorer Status Bar

Example of the Zone Settings:



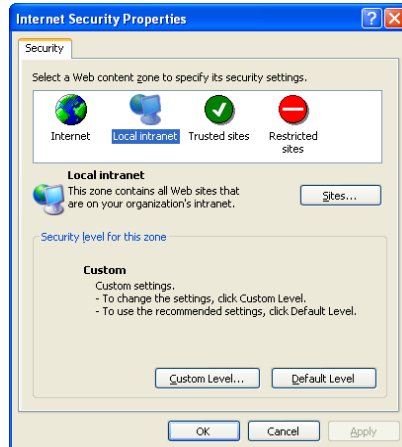
The following screenshot shows you how to change the security zone of MS CRM.



Please enter your crm-site to this list on every client!

Setup Internet Explorer to allow the Documents Core Pack ActiveX controls to run:

4. Double-Click on the **Zone Setting Icon** (Local Intranet in this example).
The following dialog box will appear:



5. Click on the **Custom Level** button, to view the current Security Zone Settings. You must now set the following settings, to either "Enable" or "Prompt" ("Enable" is recommended):

- Initialize and script ActiveX controls not marked as safe
 - Disable
 - Enable
 - Prompt
- Run ActiveX controls and plug-ins
 - Administrator approved
 - Disable
 - Enable
 - Prompt
- Script ActiveX controls marked safe for scripting
 - Disable
 - Enable
 - Prompt

6. Click OK twice to accept and close the Security Zone Settings

The Documents Core Pack Client is now setup and ready to mail merge from both Microsoft Word and the Microsoft CRM Web Client.

1.4.2 Installing Documents Core Pack Client

IMPORTANT Before installing the components:

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

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

Install the component on the client:

1. Run the "Documents Core Pack Client for MS CRM 4.0.msi" Setup file. You will see following window:

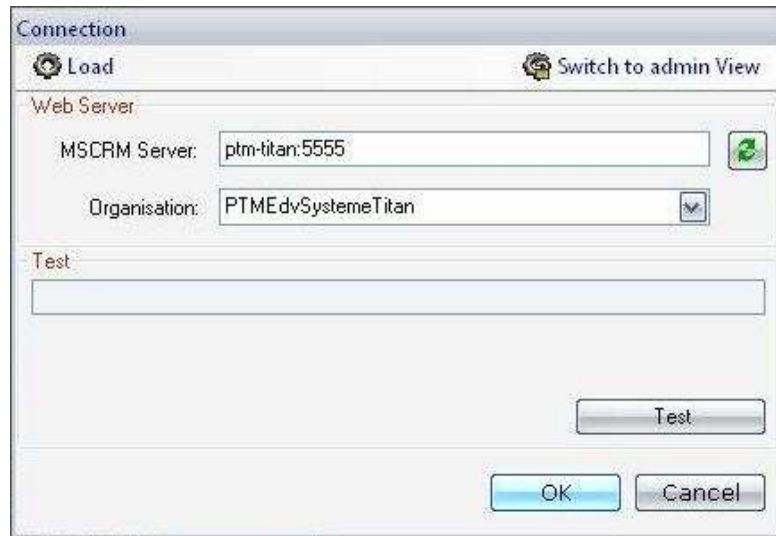


Click Next ->

2. End User License Agreement(EULA)



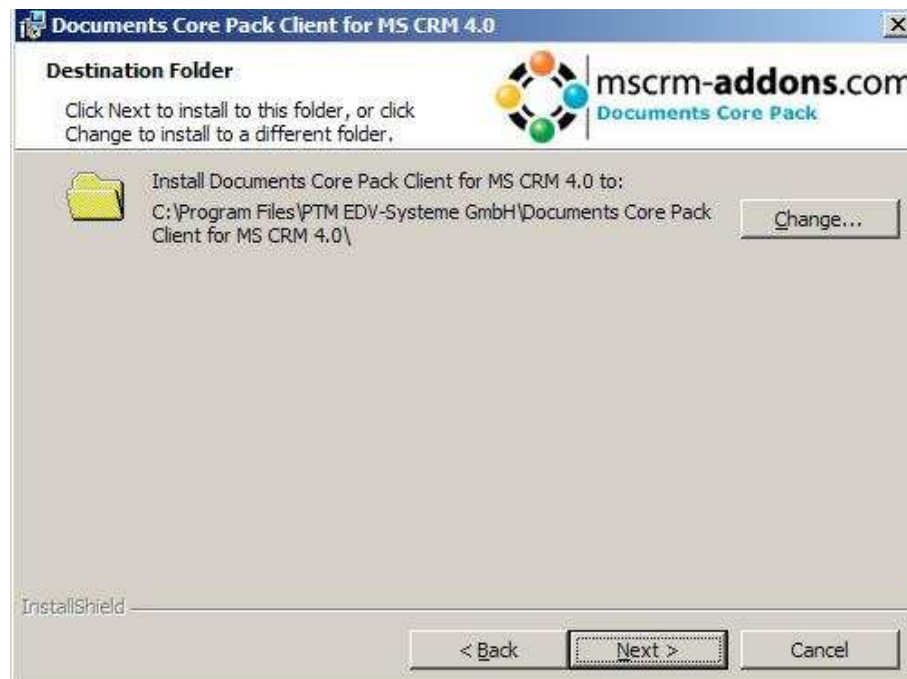
3. MSCRM Server



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

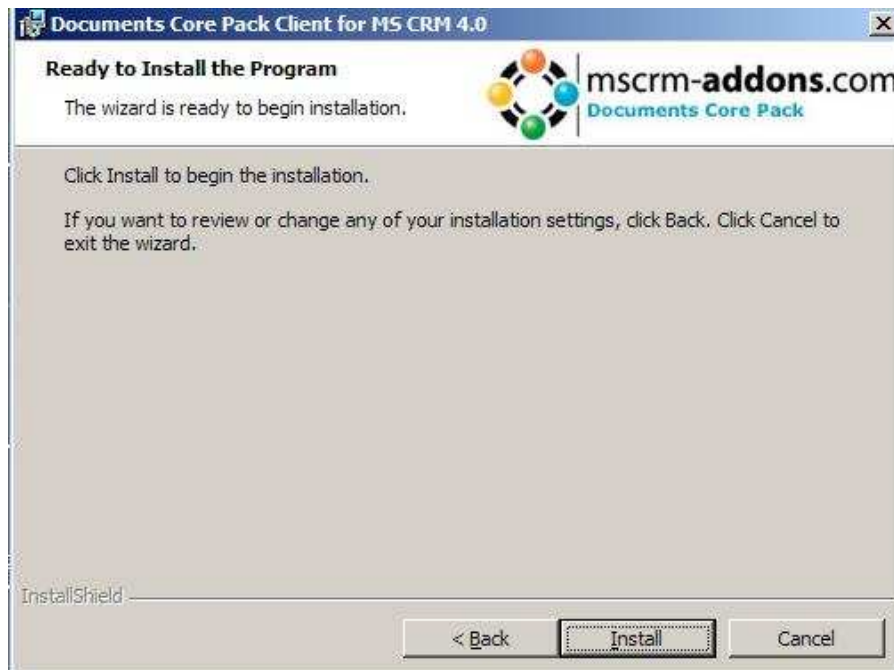
Click Next ->

4. Select Installation Folder



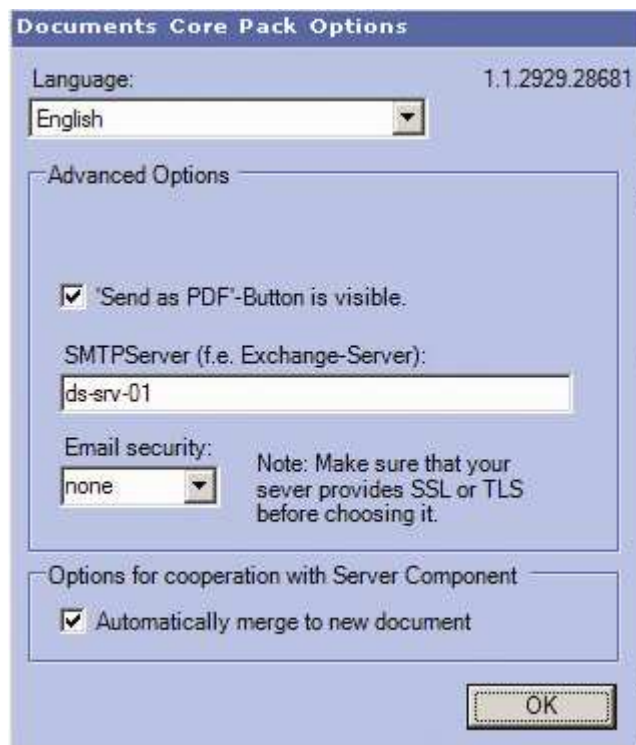
Click Next ->

5. Confirm Installation

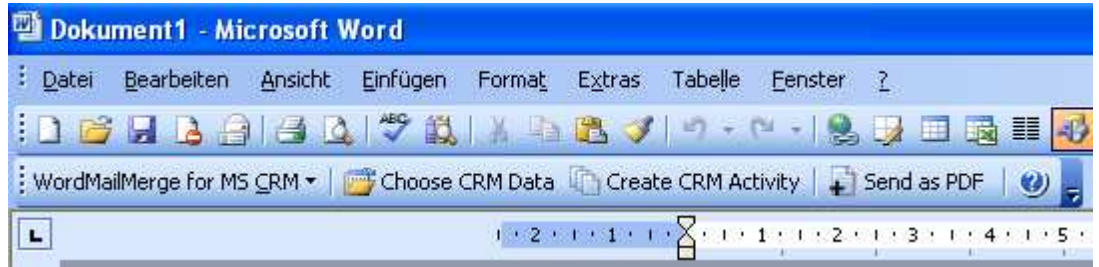


Click Install->

6. Choose the language you want to use and click OK



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



1.5 Language Settings for Documents Core Pack

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

1.5.1 Language Settings on the Client

1.5.1.1 Location of the Language Settings on the Client

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

The language file is located in the sub folder **localization** of Documents Core Pack installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Client for MS CRM 4\Localization"

Example:

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

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

1.5.1.2 Modifying the UI language on a client

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

1. Press START – RUN
2. Type "regedit" and click OK
3. Locate the registry key **HKEY_LOCAL_MACHINE\Software\PTM EDV-Systeme\CRMailMerge**
4. Change the value of the "language" setting to another language
5. Close the registry editor

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

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

1.5.1.3 How to translate a language file

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

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

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

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

1.5.2 Too Long Mergefields Problem

In some cases there occurs a problem with too long Mergefield Names. Winword just support a length of 40 characters for a Mergefield.

So if you add two Fields called

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

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

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

```
«customerid_contact_parentcustomerid_addr»
```

```
«customerid_contact_parentcustomerid_addr»
```

So Documents Core Pack can't differentiate them !!

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

1.5.2.1 Set up Too Long Mergefields

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

```
<add key="NamesToCut" value="parentcustomerid-pc1,parentaccountid-pa1"/>
```

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

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

It also changes them by order.

So if you change it to `value="customerid-cid1,parentcustomerid-pc1,parentaccountid-pa1"` it replaces the Mergefield above to "cid1_parentcid1_pa1_name".

If you add customerid to the End (`value="parentcustomerid-pc1,parentaccountid-pa1,customerid-cid1"`) the result is "cid1_pc1_pa1_name"

1.5.2.2 Important thing you should know!!

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

Example:

A existing Document with two Mergefields.

parentaccountid_name and parentaccountid_fax

Now you change the Web.config to shorten parentaccountid to pc1.

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

But all the OLD Templates which uses Mergefields including parentaccountid will not work any more! So you have to edit them! (Maybe the Replace... Function of Winword will be a good Idea.)

Sometimes it will be the better Way to replace full Mergefields. So instead of changing just a part of a Mergefield let WMM replace the whole one.

E.g.:

"customerid_contact_parentcustomerid_address1_fax" to

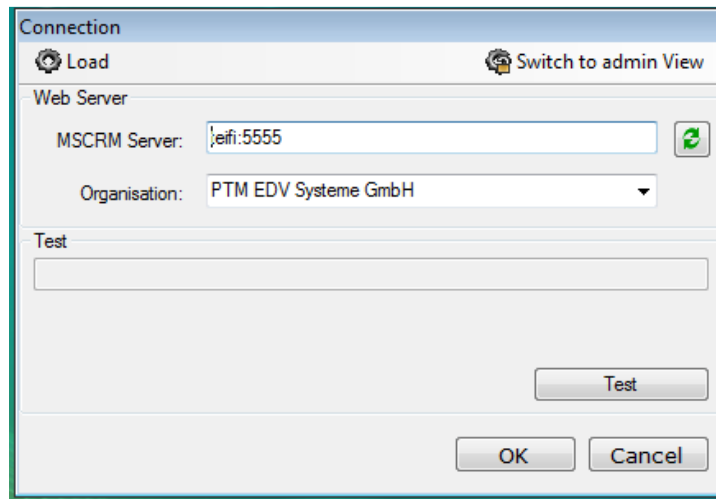
"cust_cont_par_adr1_fax"

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

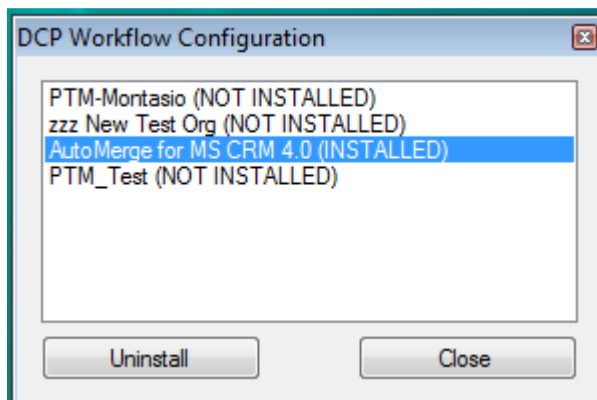
1.6 Uninstall AutoMerge

To uninstall AutoMerge follow the steps below.

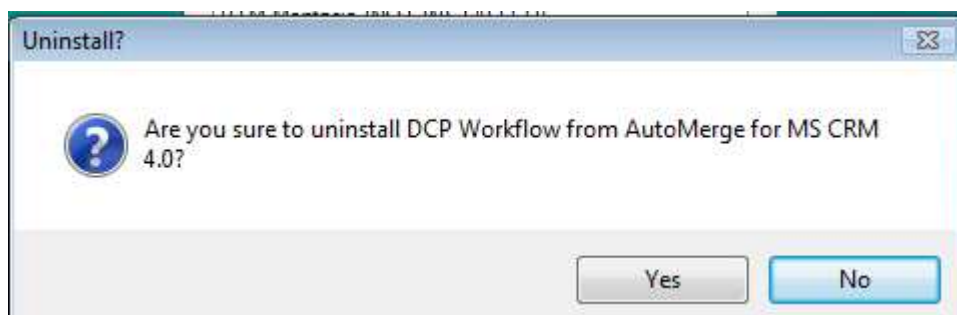
1. Go to the installation directory and start the DCPWorkflowClientSetup.exe. You'll see the connection dialog. Click OK to proceed



2. After that you'll see a list of all organizations on this CRM Server. In brackets you see if you have installed AutoMerge on this organization. Please select a organization and click on "Uninstall"



3. You'll be asked if you really want to uninstall AutoMerge for this organization. Click on "Yes" and AutoMerge will be uninstalled from this organization



1.7 Upgrade AutoMerge

Follow the steps below to upgrade AutoMerge:

1. Download the latest version of AutoMerge from www.mscrm-addons.com
2. Make sure you have your license file
3. Follow the uninstall instructions from step 1.6
4. Replace all files (except of the templates folder) with them from the new downloaded ZIP file
5. Follow the install instructions from step 1.1 and install the license again. Also you have to configure the WindowsService user again

2 Documents Core Pack Templates

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

For example you have a "Account reconnect" Template you often send to accounts. Then you create this template and save it as Account - Template and from this moment every MS CRM User can generate a "Account reconnect" Letter with this template from the MS CRM Web Client.

The installation of Documents Core Pack includes this "Account reconnect" template. Test this behaviour and open an account in the WebClient and click on the "Print in Word" Button.

2.1 How to create Documents Core Pack Templates

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

2.2 Security Settings for Documents Core Pack Templates

This section is just for NON-sharepoint users as the templates are stored on a share on the server in this case.

The save Documents Core Pack templates are saved in a share on the server where you installed the Documents Core Packr server component by default.

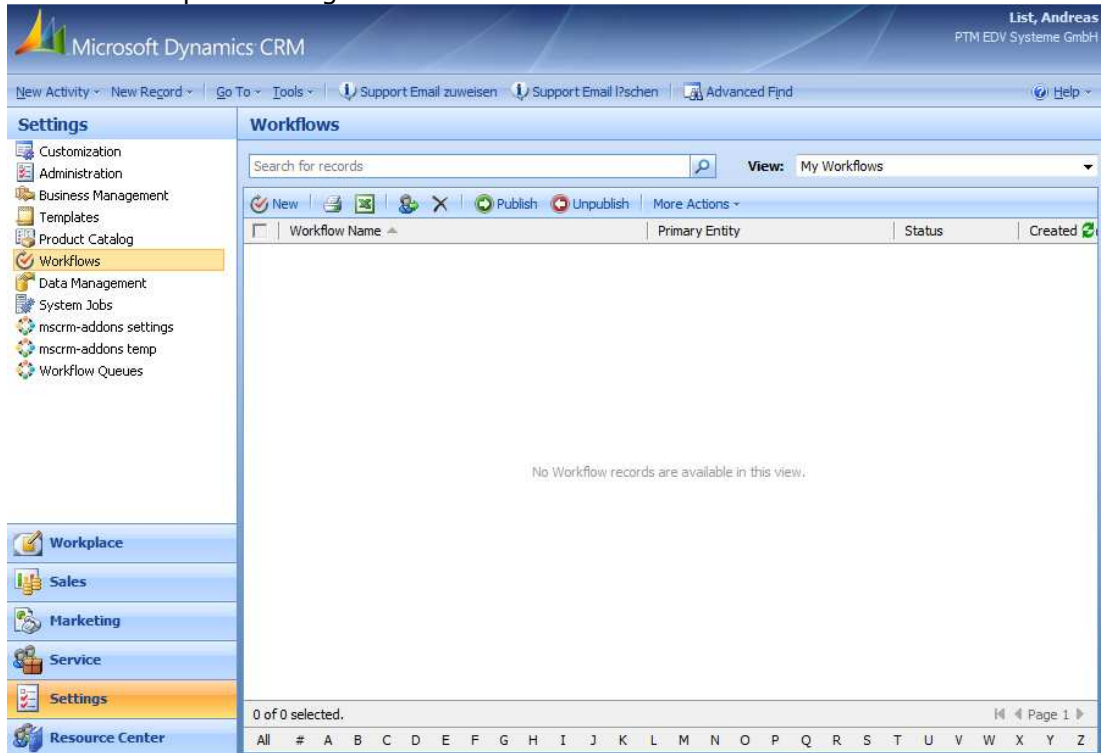
Typically under c:\program files\PTM EDV-Systeme GmbH\Documents Core Pack Server for MS CRM 4\templates\

If you want to allow only some users to create or change Documents Core Pack templates you can do that with defining some NTFS Security Settings on this File Share.

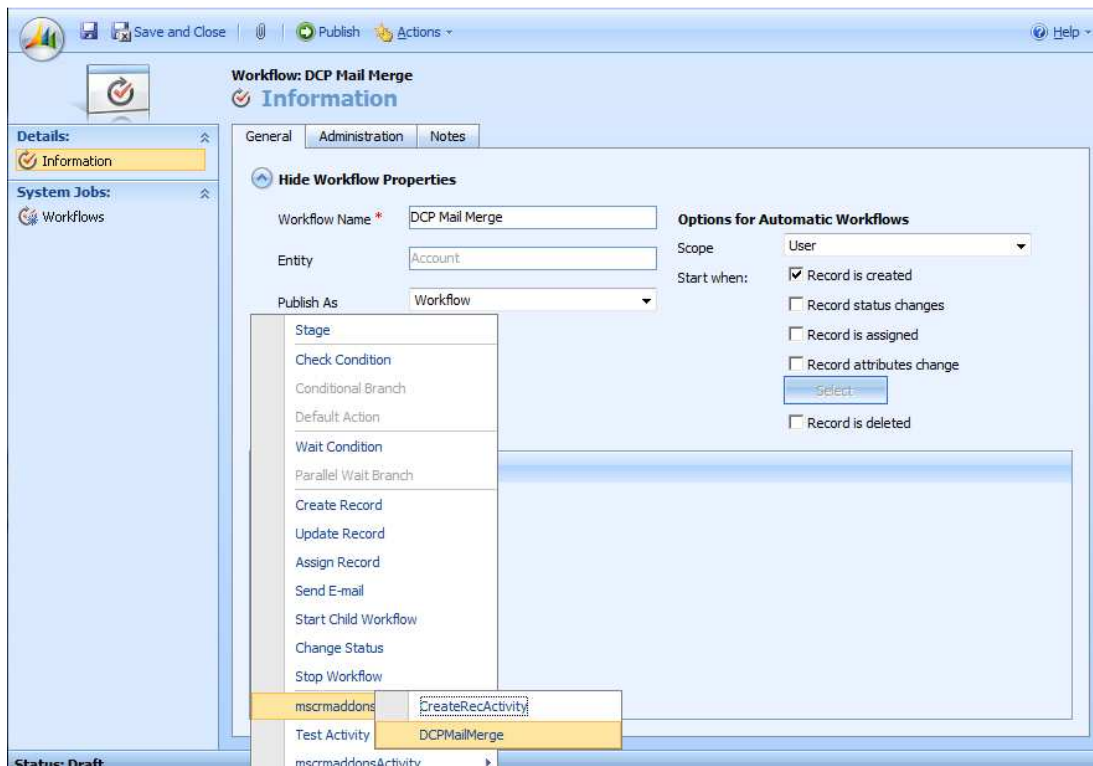
It's also possible to change the location of the Documents Core Pack templates. Therefore you have to start the DocumentsCorePack Server Config and choose a new location for the templates. You'll find this setting on the "General"-Tab of the configuration.

3 Configuring a CRM Workflow

Within CRM open Settings -> Workflows



Create a new Workflow and design it to your requirements. When you're at the part to start the mail merge, go to "Add Step" -> "mscrmaddonsWorkflows" -> "DCPMailMerge"



After that click on "Set Properties" and you'll see following screen

Property Name	Data Type	Value
template	nvarchar	http://montasio/DCPTemplates/1/AccountReconnect.dot
subject	nvarchar	subject
Hit "Create CRM Activity"-button	bit	<input type="radio"/> False <input checked="" type="radio"/> True

Form Assistant

Dynamic Values

Dynamic Values

Operator:
Set to

Look for:
Account
Credit Hold

Add

Move Up Move Down

Default value:
 False True

OK

Here you can configure the basic settings for the creation of the document.

1. **Template:** Specifies the template to be used by AutoMerge
Examples:
File-Share: <\\teifi\DocumentsCorePackTemplates\1\Account Reconnect.dot>
SharePoint: <http://teifi/Templates/1/Account%20Reconnect.dot>.
Local path: <C:\Programme\PTM EDV\templates\1\Account Reconnect.dot>

IMPORTANT: The template has to be defined for the specified entity

2. **Subject:** specifies the default-subject of the activity that will be created.
If empty, following schema will be used:
"[NO SUBJECT] CURRENTDATEANDTIME"
If a DocumentName has been defined within the template (see chapter 4), this setting will be overwritten.
3. **Hit "Create CRM Activity"-button:** Specifies, whether the Create CRM activity button should be triggered automatically or not.
Per default it should be set to "True".
This option has to be set to "False", if you want to e.g. run a macro or use the "Send as PDF" option (See chapter 4.3)

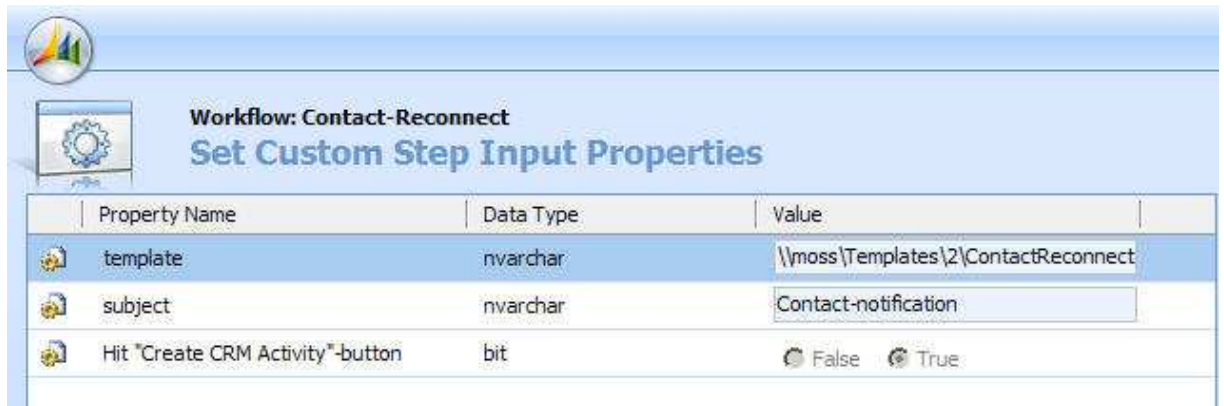
Click on "Save and Close" to close this screen. When you're finished with the workflow, you can publish it.

4 Examples

All templates used for the examples are delivered with the installation of AutoMerge for MSCRM 4.

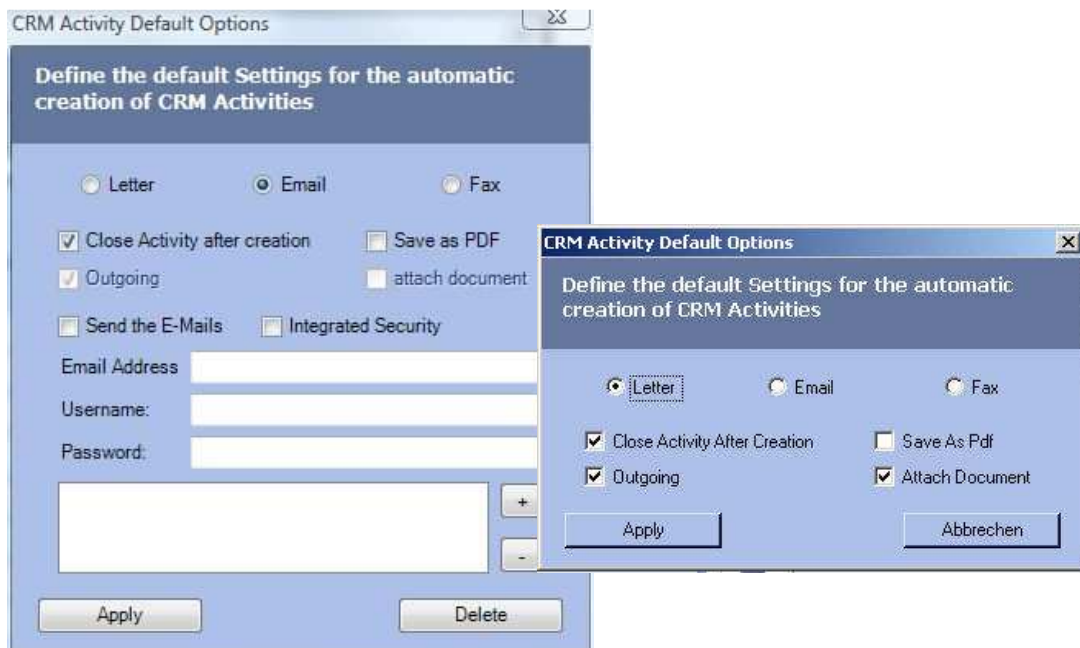
Basically, AutoMerge depends on two configurations

1. **CRM-Workflow:** Contains the template to be used, default-subject and whether to create an Activity automatically or not



2. **Document Properties of the template:** Accessible by opening the template in MS Word->Insert MailMerge fields->Document Properties(2nd tab).

Next to multiple settings like [Document Name],[CreateActivitiesfor] this section provides the possibility to define the activity-parameter like type, direction etc.



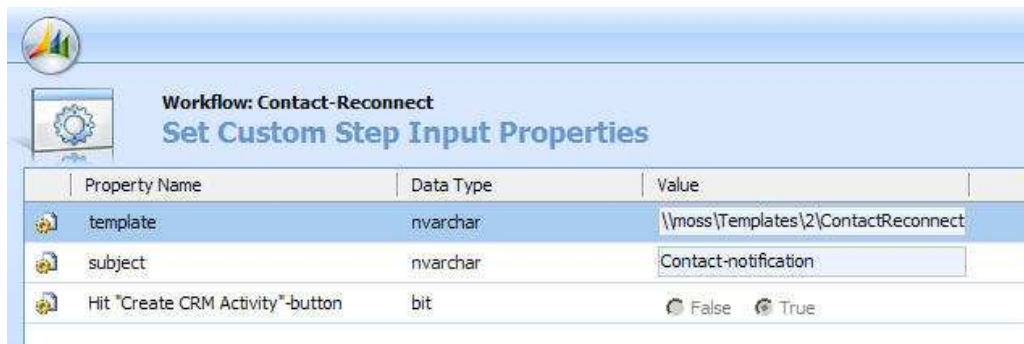
The following examples show some of the possibilities provided by AutoMerge for MS CRM 4. All used templates come with the installation.

4.1 Simple activity-creation

Template: ContactReconnect-GiftCertificate.dot

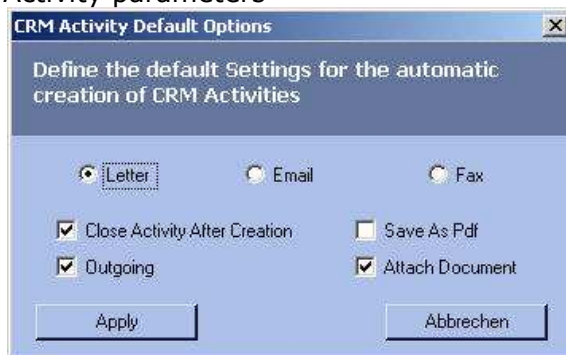
This example shows how to setup a template to create and save an activity with AutoMerge for MS CRM 4. Additionally, the FileExplorer-Integration has been configured for Documents Core Pack.

CRM-Workflow setup: Next to the template to be used, a default-subject is specified and the 'create CRM Activity'-button should be fired automatically. (see chapter 3 for details)



Property Name	Data Type	Value
template	nvarchar	\\moss\Templates\2>ContactReconnect
subject	nvarchar	Contact-notification
Hit "Create CRM Activity"-button	bit	<input checked="" type="radio"/> False <input checked="" type="radio"/> True

AutoCreateCRMactivity setup: Within the template, we define the following Activity parameters



CRM Activity Default Options

Define the default Settings for the automatic creation of CRM Activities

Letter
 Email
 Fax

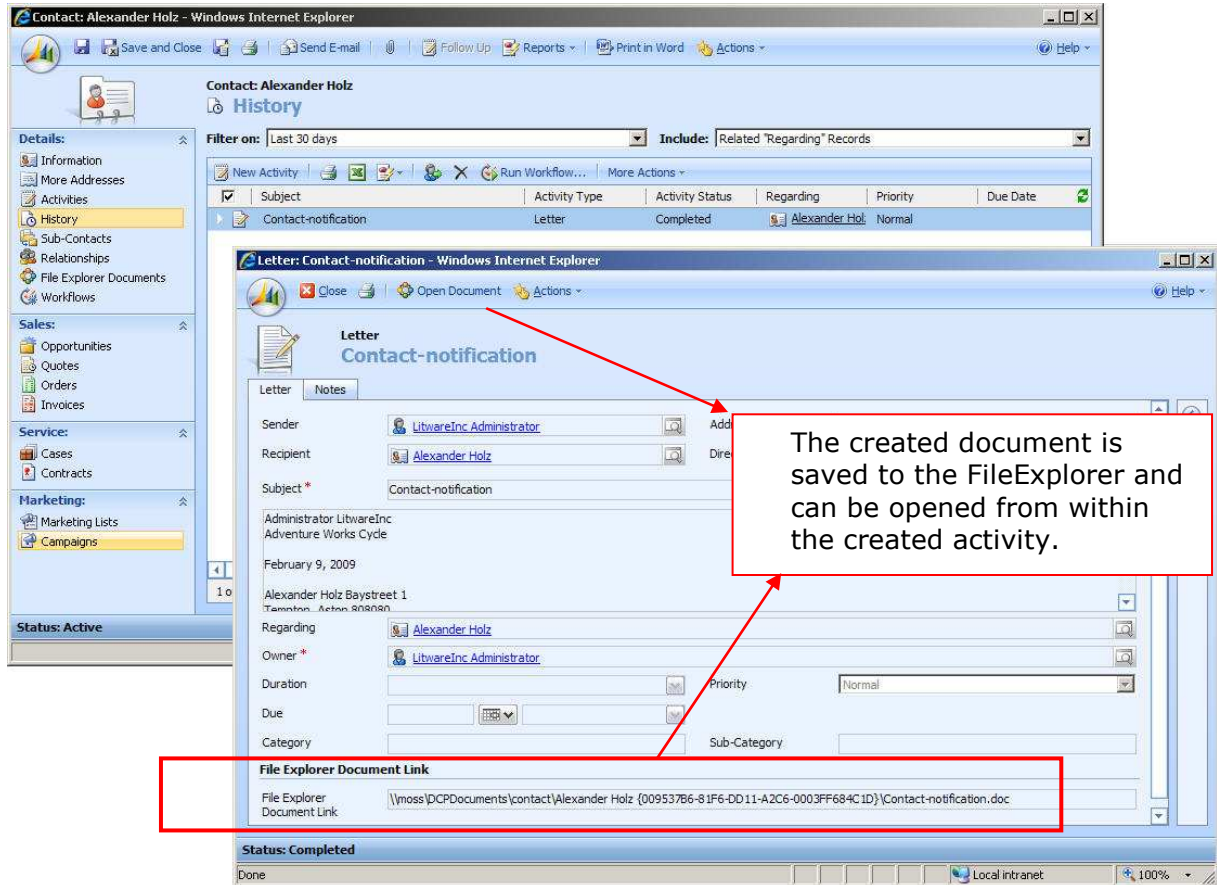
Close Activity After Creation
 Save As Pdf

Outgoing
 Attach Document

Apply Abbrechen

A letter activity should be created and closed (so it will show up in the history). The generated document should be attached to the activity (saved to the File Share)

Result: A letter activity with the document attached has been created and saved after creating a new Contact in CRM. The document itself is located on the File-Share(see DocumentsCorePack-UserGuide, chapter 12.2)



4.2 Send salutation-email to new Lead

Template: *Lead-Welcome-mail.dot*

In this example, AutoMerge is configured to create an email-activity and send it to the Lead including an attachment.

CRM Workflow-setup: Next to the template to be used, a default-subject is specified and the 'create CRM Activity' button should be fired automatically. (see chapter 3 for details)

The screenshot shows a CRM workflow configuration window titled "Workflow: Lead-salutation" with the sub-header "Set Custom Step Input Properties". It contains a table with the following data:

Property Name	Data Type	Value
template	nvarchar	\\moss\Templates\4\Lead-Salutation.doc
subject	nvarchar	Welcome to mscrm-addons
Hit "Create CRM Activity"-button	bit	<input type="radio"/> False <input checked="" type="radio"/> True

AutoCreateCRMactivity setup: Within the template (Document Properties), we define following activity-parameters:

The screenshot shows a dialog box titled "CRM Activity Default Options" with the instruction "Define the default Settings for the automatic creation of CRM Activities". The settings are as follows:

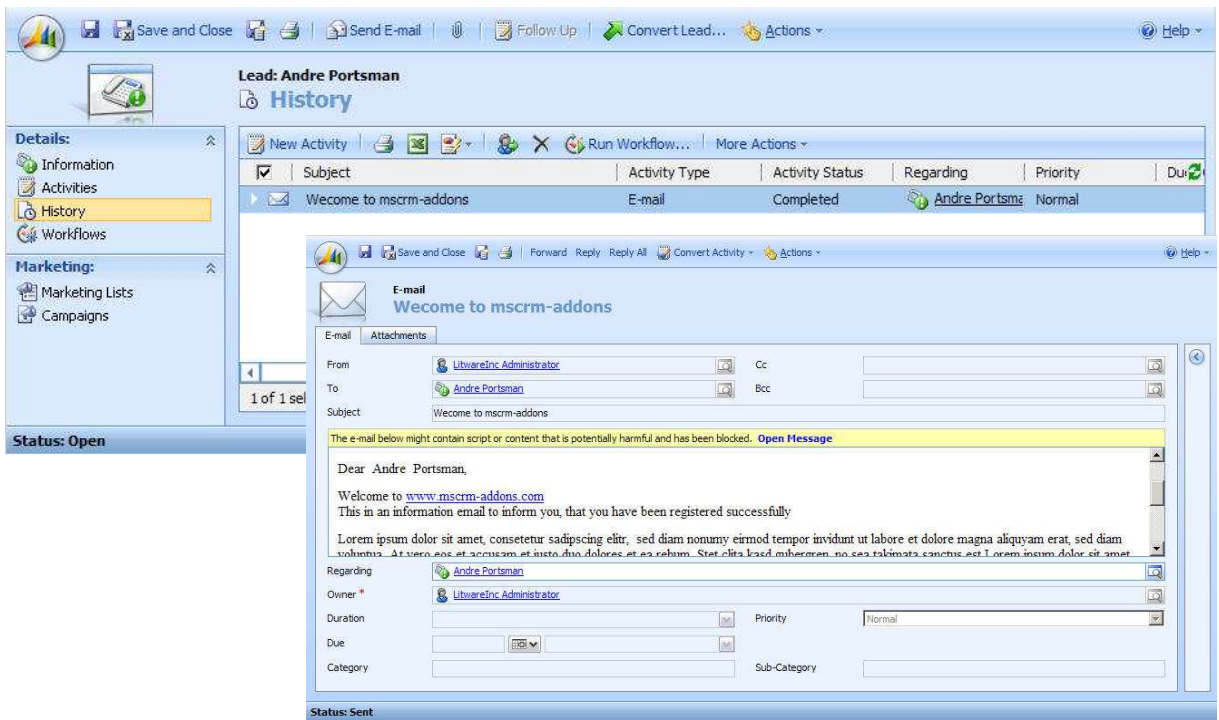
- Activity Type: Letter, Email, Fax
- Close Activity After Creation, Save As Pdf
- Outgoing, Attach Document
- Send Emails, Use Windows Integrated Security
- Email Address: administrator@litwareinc.com
- Username: [Empty field]
- Password: [Empty field]
- Attachment: C:\Additional-Information.doc

Buttons at the bottom: Apply, Abbrechen.

An email-activity should be created and sent including an attachment by using Windows integrated security.

IMPORTANT: The Attachment will not show up in the CRM-email-activity because of memory-reasons

Result: A new email-activity has been created and saved to CRM. Next to this, the mail has been sent with the attachment specified above.



4.3 Send quote as PDF

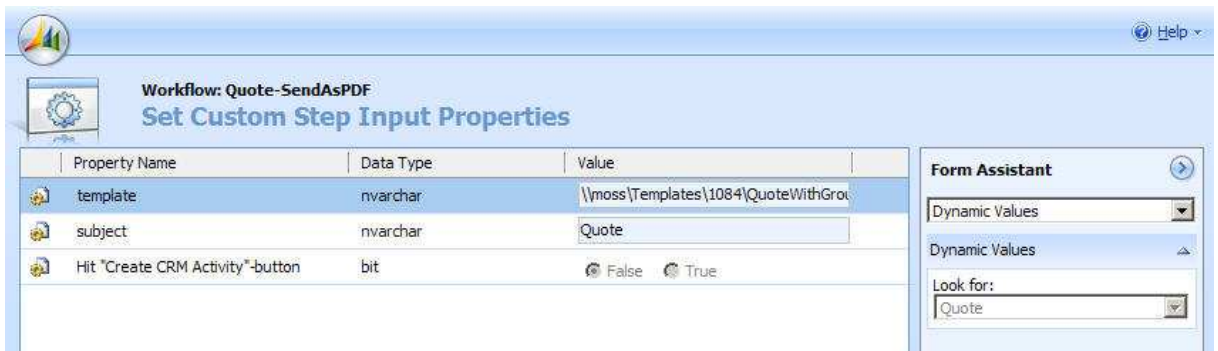
Template: *QuoteWithGrouping-SendAsPDF.dot*

Next to "Create CRM activity" it's possible to use the "Send as PDF"- functionality with AutoMerge as well.

This provides the possibility to e.g send Invoices, Quotes etc. to the customer by activating the workflow within CRM.

To use the [Send as PDF]-feature, the workflow-properties have to be modified and the Send as PDF-button has to be triggered via Macro

Workflow-Configuration: As the CreateCRM-activity-button should not be fired, the [Hit 'Create CRM Activity'-button] has to be set to **false!**



Macro: The following code triggers the SendAsPDF-button when the merge is finished. (the code is available in the template)

```
Public Sub DocumentsCorePackMacro()
```

```
'Automation
```

```
'ID          NAME          Index
' 1          WordMailMerge for MS &CRM  WordMailMerge for MS &CRM  1
' 1          Choose CRM Data          2
' 1          Create CRM Activity      3
' 1          Send as PDF              4
' 1          WordMailMerge Help      5
```

```
Dim myBar As CommandBar
```

```
Set myBar = CommandBars("www.mscrm-addons.com Toolbar")
```

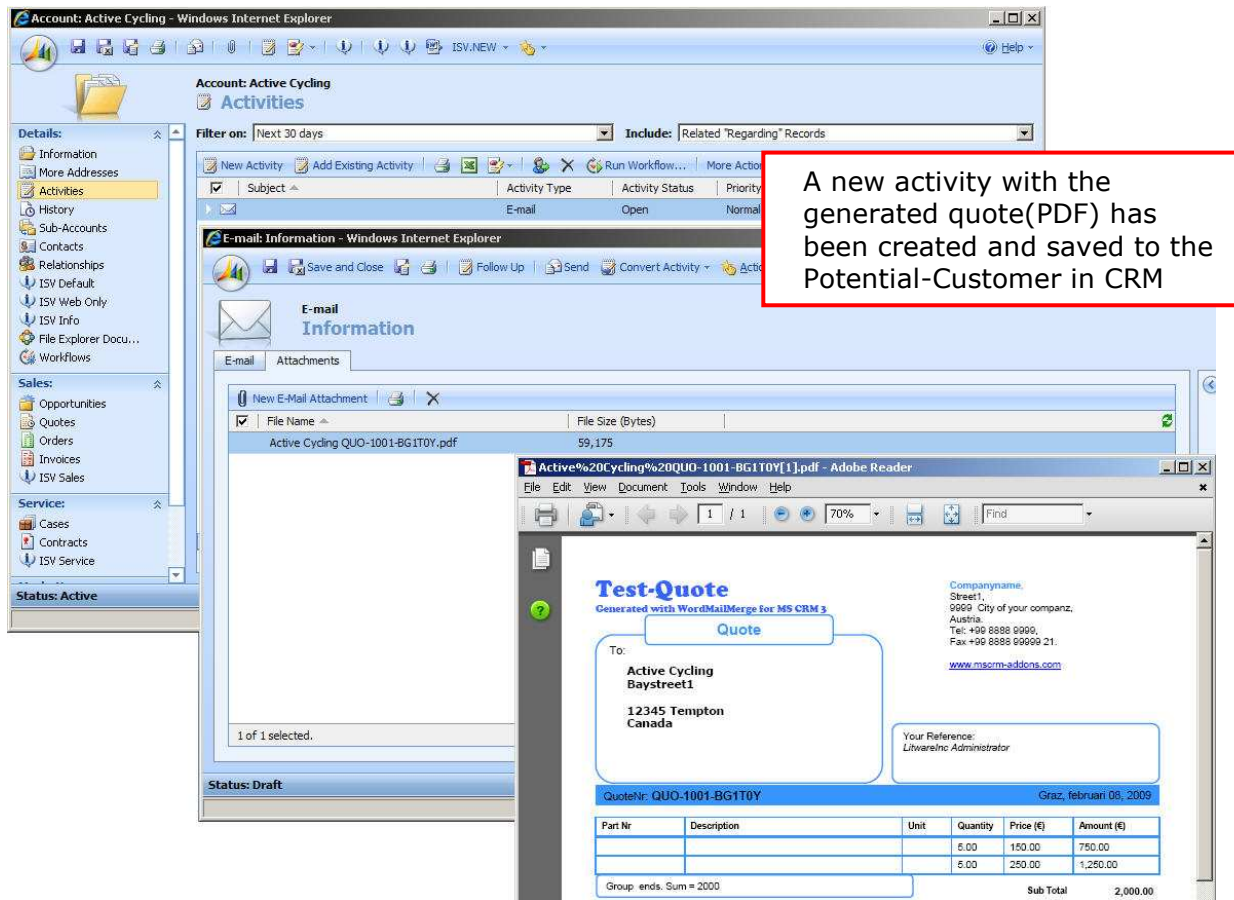
```
If Not myBar.Visible Then
```

```
    myBar.Visible = True
```

```
End If
```

```
myBar.Controls(4).Execute '4 specifies the event to execute (see table above)
```

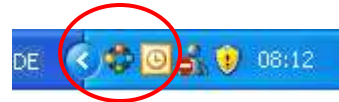
Result: A new e-mail activity with the generated PDF-file is created and saved to the activity.



5 The Documents Core Pack Data- Provider

Since version 2.18 the Documents Core PackDataProvider has been implemented. It builds up the webservice which is needed to load data from CRM to MS Word and inversely to save data into MS CRM. This improves the performance of Documents Core Pack as the webservice don't has to be established again.

You can see if the Provider is started in the taskbar.

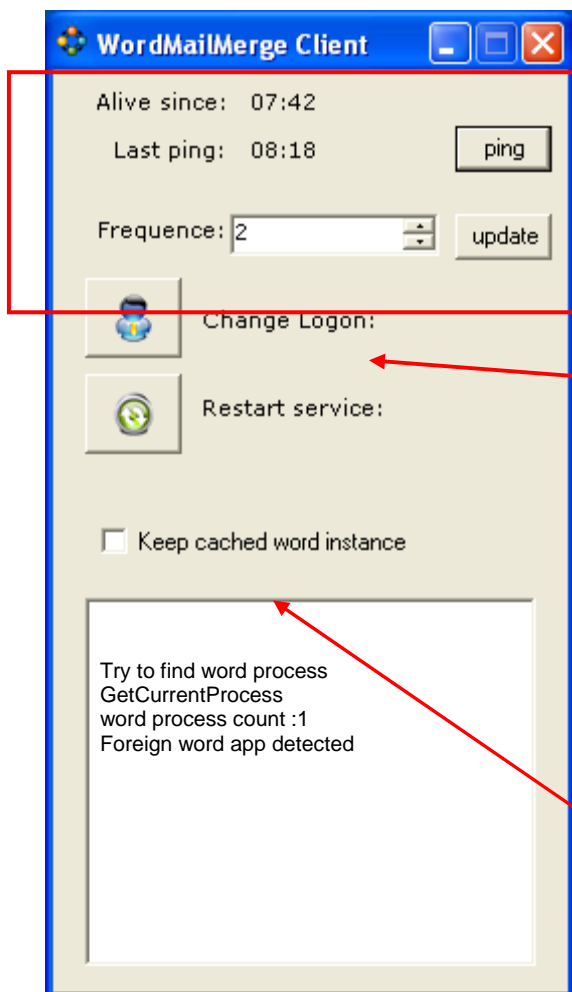


5.1 Configuration

Right-click on the icon in the taskbar -> "Config" to open the Documents Core PackDataProvider configuration.



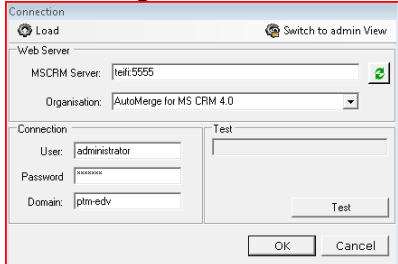
Following window appears:



Status & ping frequency:
Here you can see how long the service has been alive and when the last ping occurred.

In our case, a ping is set every two minutes to ensure that the connection to the server is O.K

User logon:
You can set the user whom you want to logon to CRM here.

A screenshot of the "Connection" dialog box. It has a "Load" button and a "Switch to admin View" button. The "Web Server" section includes "MSCRM Server:" (text: tel:5955) and "Organisation:" (dropdown: AutoMerge for MS CRM 4.0). The "Connection" section includes "User:" (text: administrator), "Password:" (masked), and "Domain:" (text: plm-edv). There is a "Test" button and "OK" and "Cancel" buttons at the bottom.

Cache word instance:
Furtheron ist possible to keep word instances cached. This improves the MS Word loading time. You can see information about cached word instances in the textbox.

6 Contact

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