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# DocumentsCorePack Server Installation Guide for Microsoft 2015/2016 and Dynamics 365

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v.1.1, January 2019

Server and Client Based Installation Guide

(How to install and configure DocumentsCorePack for MS CRM 2015/2016 and Dynamics 365)

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## Preamble

This documentation is intended to guide you through the installation of DocumentsCorePack in Microsoft Dynamics 365.

Depending on the license bought, the Server Based and Client Based Document Generation provides you with a set of tools to create and process documents inside Dynamics 365 with a few clicks.

Before installing DocumentsCorePack Server and/or Client Based Document Generation for Dynamics 365, please read this document carefully and follow the steps as described to achieve the results.

This setup contains all installations and configuration needed for using DocumentsCorePack Server and/or Client Based Document Generation & Processing.

For detailed information about the different features and settings of DocumentsCorePack Server- and/or Client Based Document Generation, please [click here](#).

## Target Audience

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

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

The installation consists of the following steps (follow each of the steps to complete the installation):

- Installing DocumentsCorePack Server for Microsoft Dynamics 365
- Configuring DocumentsCorePack Server for Microsoft Dynamics 365

## Prerequisites

[Microsoft .NET Framework 4.5 RTM is required](#)

[One of the following versions of Microsoft Dynamics CRM must be available:](#)

- Microsoft Dynamics CRM Sever 2015/2016
- Microsoft Dynamics 365
- Microsoft Dynamics CRM Online

[Window Identify Foundation](#)

The Window Identify Foundation is included in the setup and will be installed as part of the DocumentsCorePack Server Installation.

## Supported Operating Systems

- Windows 8 32/64bit
- Windows 8.1 32/64bit
- Windows 10 32/64bit
- Windows Server 2012 32/64 bit
- Windows Server 2016
- Windows Server 2019

## 1 How to install DocumentsCorePack Server?

You can install the DocumentsCorePack Client on every supported operating system which is able to connect to your Dynamics 365 server. During the installation, you have to specify at least one organization in which the DocumentsCorePack Client will be installed.

Additional organizations can be setup from the installation manager after the original setup has finished.

### Prerequisites

Before you start the installation, you have to download the DocumentsCorePack Application. You can download files [here](#).

#### *Install directly on a Dynamics 365 On-Premise Server*

You could install the DCP Server directly on a Dynamics 365 On-Premise installation. By doing so, you will have full functionality like File Explorer- or SharePoint-integration. When you specify an On-Premise Connection Profile, you have to run the setup on the Dynamics 365 server.

#### *Install for Dynamics 365 Online*

When you want to use Dynamics 365 Online, you could install DCP on every supported operating system. You have to specify a valid Dynamics 365 Online profile. In that case, you have limited functionality of the DocumentsCorePack Server. You could not use the following features:

- SharePoint Folder and Site integration
- File Explorer integration

**Attention:** After the setup is completed, you could start the DocumentsCorePack Server Configuration in the Windows Start-menu to install and configure the DocumentsCorePack Server in other Dynamics 365 organizations.

## 2 Installation DocumentsCorePack Server

This chapter explains how to install the Server component. Important is to be sure that the machine is online to the Dynamics 365 server.

### 2.1 Online Service Configuration

The web-based setup allows users to configure DocumentsCorePack ServerBased Document Generation for Microsoft Dynamics 365 Online without local installations. The service, as well as licensing, can be configured and maintained on our website.

For detailed information for OnPremise installations please read [CHAPTER 2.5 SERVICE CONFIGURATION ON PAGE 23](#).

Also, follow the links below for more information:

- [Start Trial/Configure Services for DocumentsCorePack ServerBased for Microsoft Dynamics 365](#)
- [Watch our DocumentsCorePack ServerBased Online Configuration YouTube Video](#)
- [DocumentsCorePack SeverBased User Guide](#)

## 2.2 Installation

Run the “DocumentsCorePack Server for MS Dynamics 365.exe” setup file. You will see the following window:

Hit the **[Next >]**-button to continue with the license agreement.

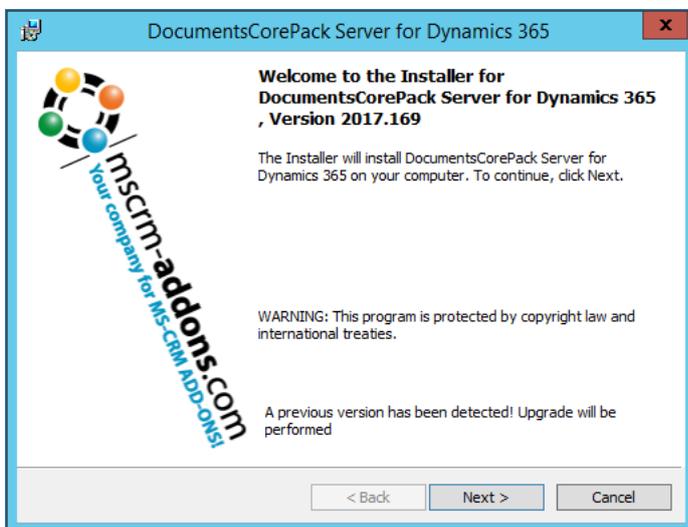


Figure 1: Installer DCP Server for Dynamics 365

### 2.2.1 End User License Agreement (EULA)

Please accept the license agreement by checking the first checkbox (highlighted in yellow) and click on the **[Next >]**-button.

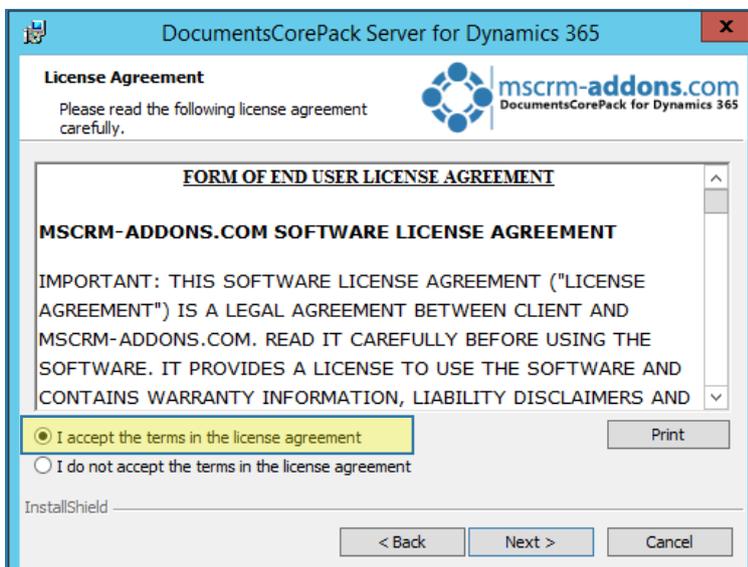


Figure 2: End User License Agreement (EULA)

## 2.2.2 Confirm the installation

Click on the **1 [Install]**-button to begin the installation as you can see in the figure below.

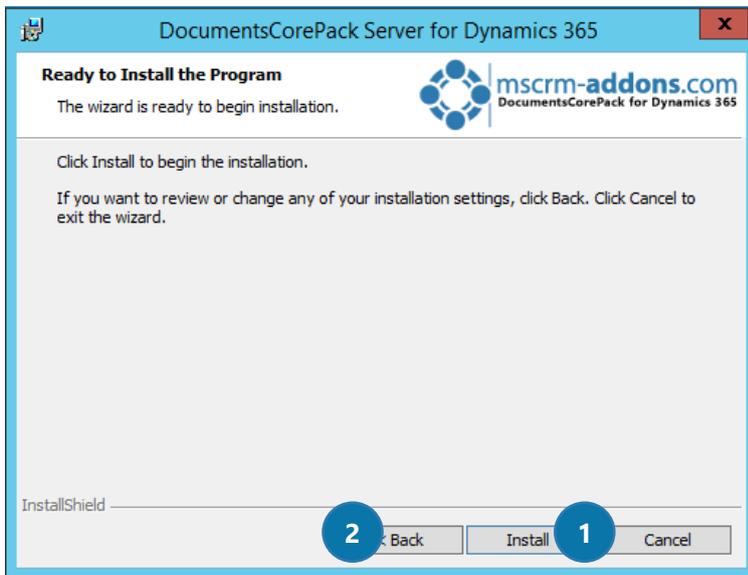


Figure 3: Confirm installation

If you want to change any of your installation settings, please hit the **2 [Back]**-button. If you go back, you can, for example, change the installation folder as you can see in the figure below. Click **[Change]** to specify a different installation path. Click **[Next]** to proceed.

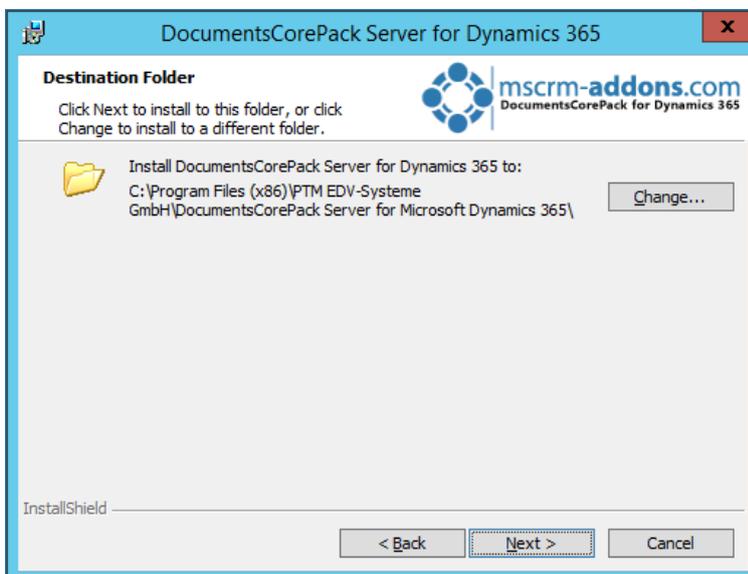


Figure 4: Change installation folder

While the installation is running, the window below appears. This may take several minutes.

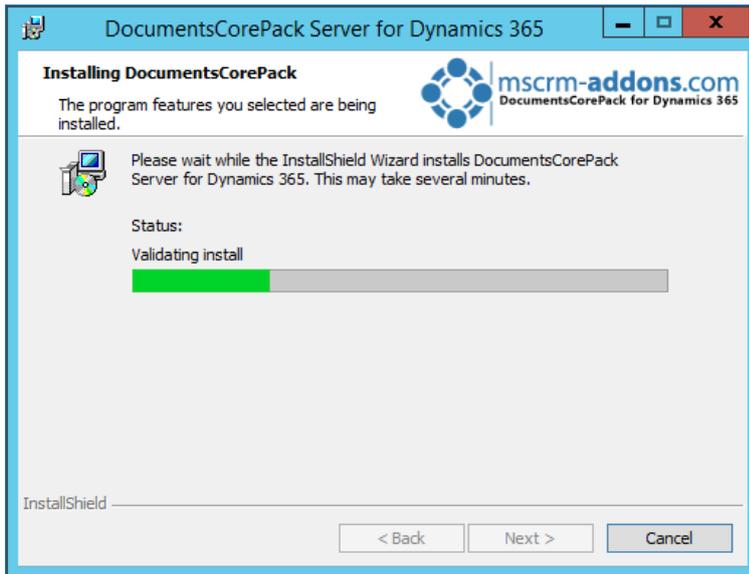


Figure 5: Installation Status

### 2.2.3 Install Windows Identify Foundation

To use the DocumentsCorePack Server for Microsoft Dynamics 365 you have to install the Windows Identify Foundation. This window will pop up when the Window Identify Foundation is not installed.

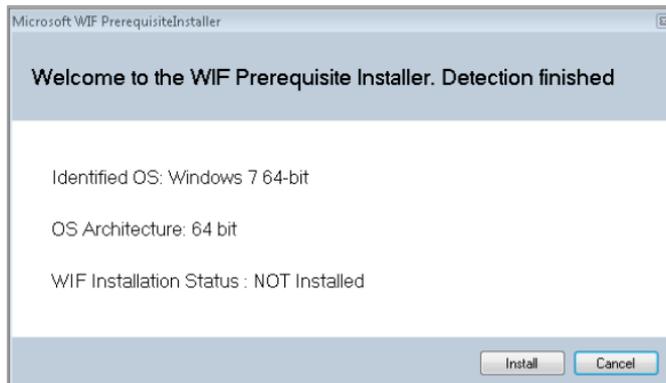


Figure 6: Install Windows Identify Foundation

### 2.2.4 Configure Dynamics 365 Server

Next, you have to configure your Dynamics 365 server. Therefore, select your **1** profile or create a new profile and select your **2** Dynamics 365 type. Choose the **3** server path and add your login credentials by filling in the field's **4** username, password and domain or choose the default credentials. Click on the **5** **[Retrieve all]**-button and as soon as the organizations are retrieved, choose one and press the **6** **[OK]**-button.

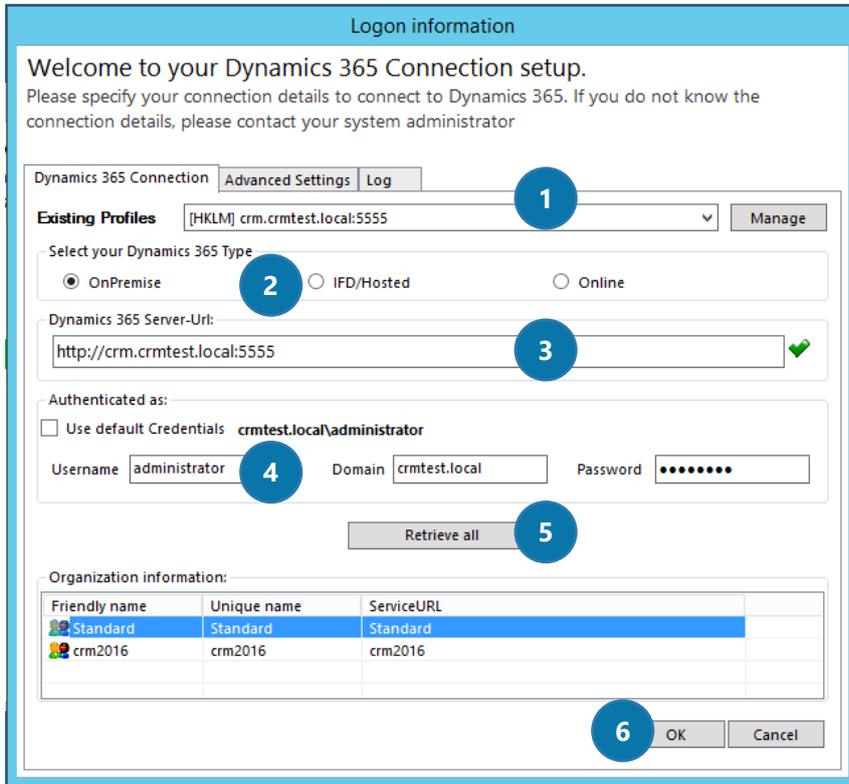


Figure 7: Dynamics 365 Connection setup

For DocumentsCorePack, the IFD setup is only required when using SharePoint Folder and Sites Integration. You have to install IFD before you can use it. You can find the IFD wizard [here](#).

Click on **[OK]** to continue. Following windows appear:

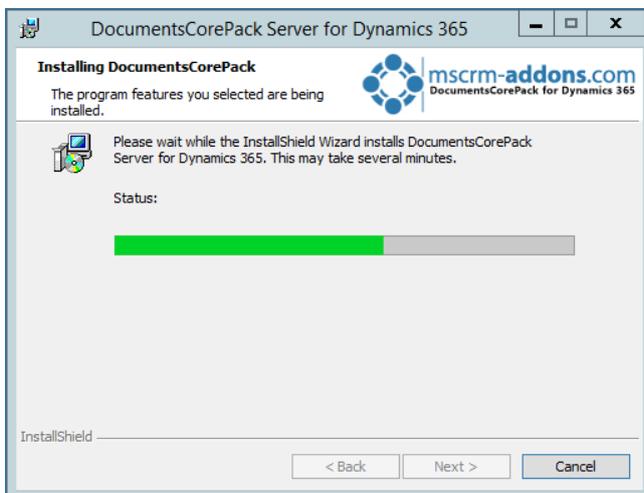


Figure 8: Installation Status

The installation can take a while. Please do not close the window. As reminder you will see following message-box in the Task pane:

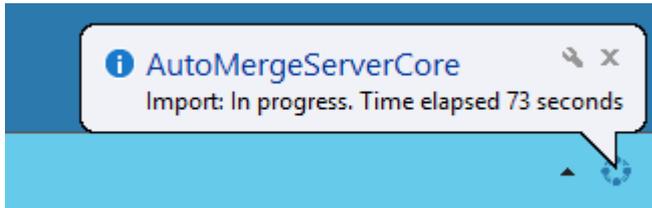


Figure 9: Installation Message

If an old DocumentsCorePack version is detected while installation, you will be prompting to uninstall.

## 2.2.5 Security Roles

### General security roles for all products:

The following security role is required by all our products:

- MSCRM-Addons General Security Role

This security role contains the basic requirements for using the product itself and to be able to perform the license-check.

### Product-specific security roles:

Following security roles are required only by specific products. All users that should work with the products require both the MSCRM-Addons General Security Role and the product-specific security roles.

- **DocumentsCorePack:**  
DocumentsCorePack Security Role
- **AutoMerge**  
MSCRM-ADDONS.com AutoMerge



Figure 10: Security Roles

Click **[Yes]** to allow setup to changing these security roles. Click **[No]** to skip this step.

**NOTE:** By passing this step requires you to either manually assign the roles to all users or to include the required rights into your existing security roles!

If SharePoint is already configured in your Dynamics 365-systeme, following window appears.

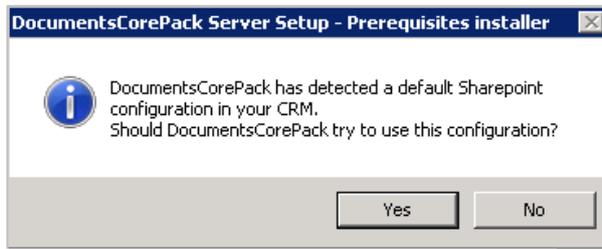


Figure 11: DCP Server Setup - Prerequisites

Click **[Yes]** to allow DocumentsCorePack Server setup to use this SharePoint.

Click **[No]** to skip this step.

Please read [CHAPTER 2.4.3 THE SHAREPOINT-TAB ON PAGE 22](#) for detailed information on how to configure your SharePoint.

## 2.2.6 Finish the installation

The DocumentsCorePack Server Configuration will start automatically for the organization you selected during the setup. Click on **[Finish]** to continue.

**NOTE:** If an obsolete product has been detected during the setup you will be asked to delete the unnecessary product(s) to avoid confusion between the two products.

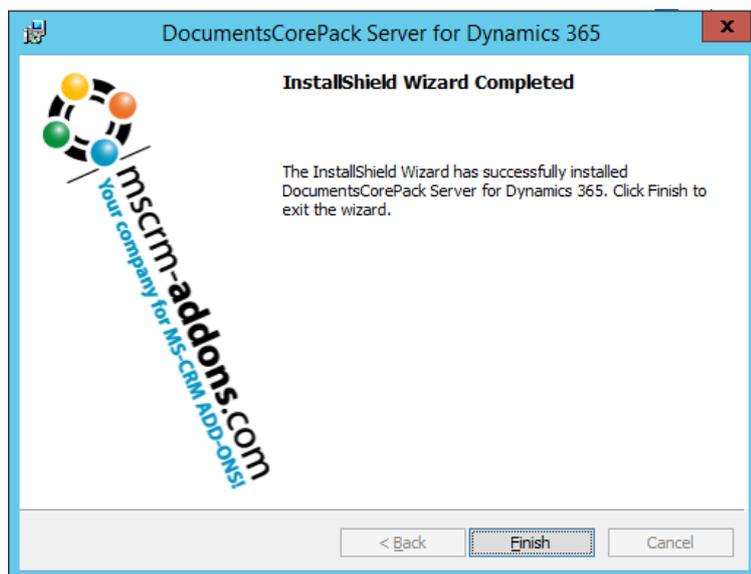


Figure 12: Finish installation

## 2.3 Organization overview

After finishing the configuration, the *Organization overview*-window opens. With a click on the configuration, you get the possibility to edit the service.

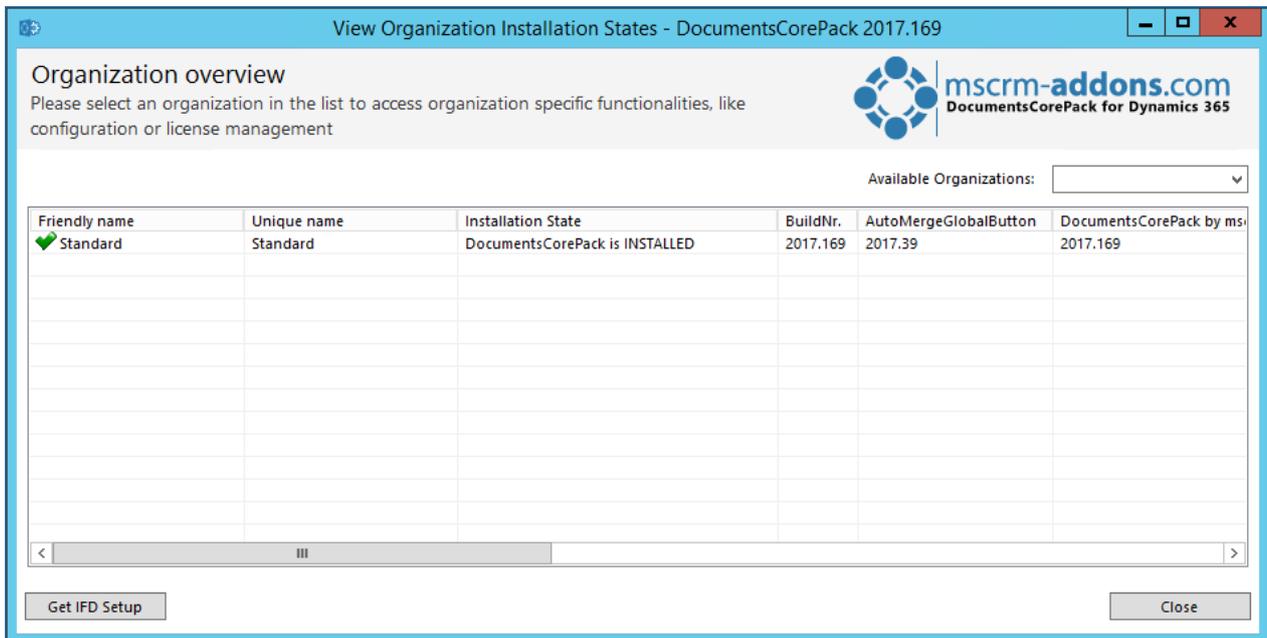


Figure 13: Organization overview

If you close the Organization overview, you have also the possibility to open this window via the Windows Start Pane. Therefore, please search for "Configuration – DocumentsCorePack for Dynamics 365".

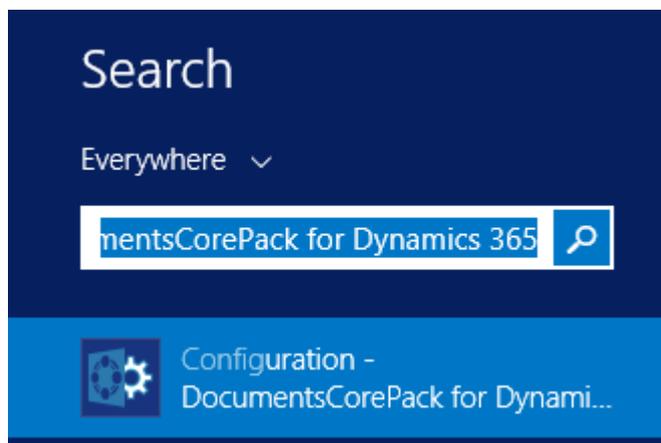


Figure 14: Start Pane – Configuration DocumentsCorePack

This action will open the Dynamics 365 Connection setup. Please proceed like in [CHAPTER 2.2.4 CONFIGURE DYNAMICS 365 SERVER ON PAGE 9](#). to open the Organization overview-window again.

By choosing an organisation in the Organization overview-window, the several function-buttons will be visible at the window-bottom.

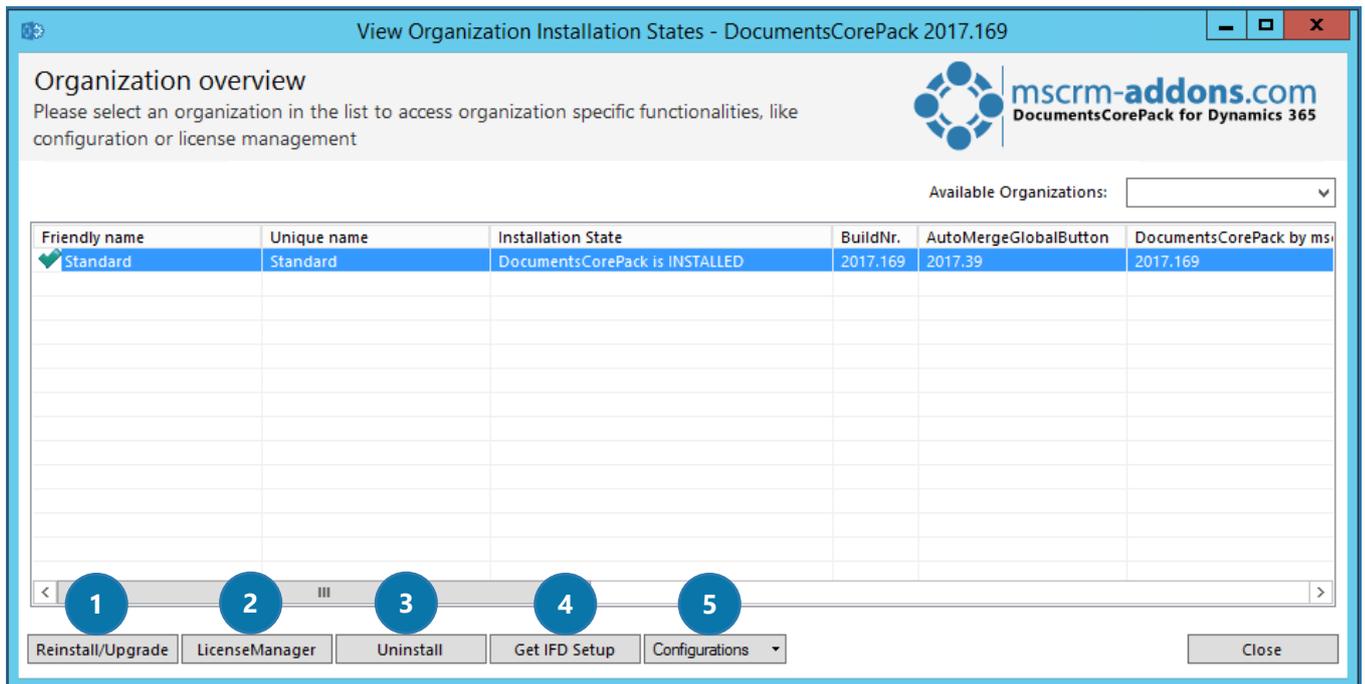


Figure 15: Organization overview function buttons

These buttons are described below and enable you to configure or modify your service:

### 2.3.1 Reinstall/Upgrade

With a click on the **[Reinstall/Upgrade]**-button, you can upgrade your solution to the latest version.

### 2.3.2 LicenseManager

A click on this button opens the local License Manager. The License Manager provides you with an overview of all the MSCRM-ADDONS products you have installed. Selecting a product in this overview will bring up the according to license details on the right side. A green check, next to an add-on icon, means that its license is valid. A cross symbolizes an invalid license. More information about the local License Manager can be found in the corresponding [documentation](#) (chapter 2.1 Local License Manager Overview).

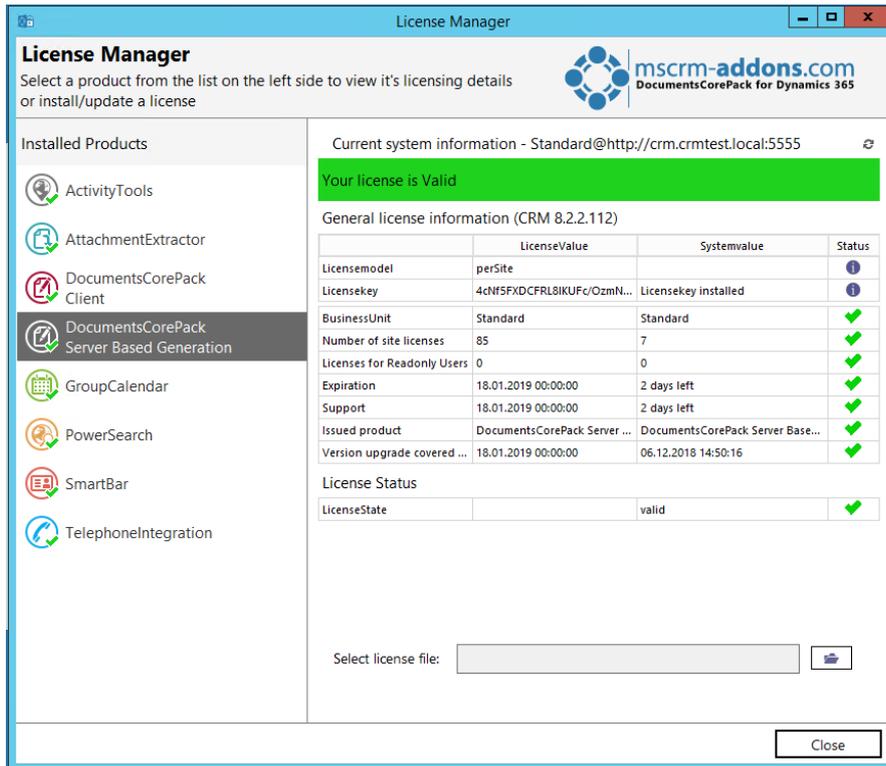


Figure 16: The local License Manager

### 2.3.3 Uninstall

With a click on this button, you have the possibility to uninstall DCP from the organization selected. Before it will be uninstalled, you will be provided with the *Uninstall*-window. Here, click on the **[Yes]**-button in order to uninstall the service or click on the **[No]**-button in order to cancel.

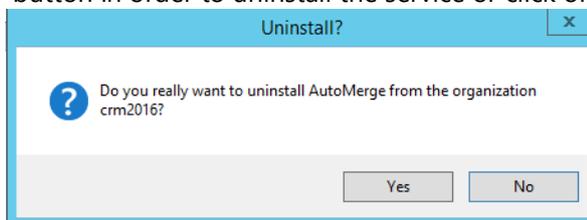


Figure 17: The Uninstall-window

### 2.3.4 Get IFD Setup

An IFD setup is only required when using FileExplorer or SharePoint Folder and Sites Integration. Therefore, you have to install IFD before you can use it – so please hit the **[Get IFD Setup]**-button.

### 2.3.5 Configurations

This button allows you to configure the ① Client & Server Based generation settings and to set up the ② Service Configuration in Dynamics 365-Online and print jobs.

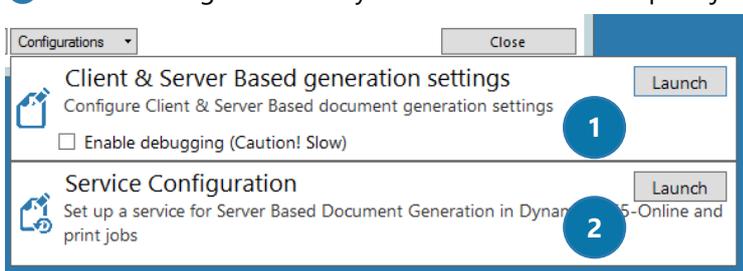


Figure 18: Configurations

## 2.4 Client & Server Based generation settings

Hit the **[Launch]**-button to open the settings for Client and / or Server Based Document Generation. The so opened window provides you with a few tabs, that help you configure your Client and ServerBased generation settings. Here users can configure on which entities the Server and/or Client Based Button should appear and rename the button label. (E.g. configure on which entities you want to see the „Export“-Button etc.).

### 2.4.1 The CommandBar-tab

The options in the *CommandBar*-tab help you to configure the commandbar button visibility and formatting for the Server Based and Client Based Document Generation.

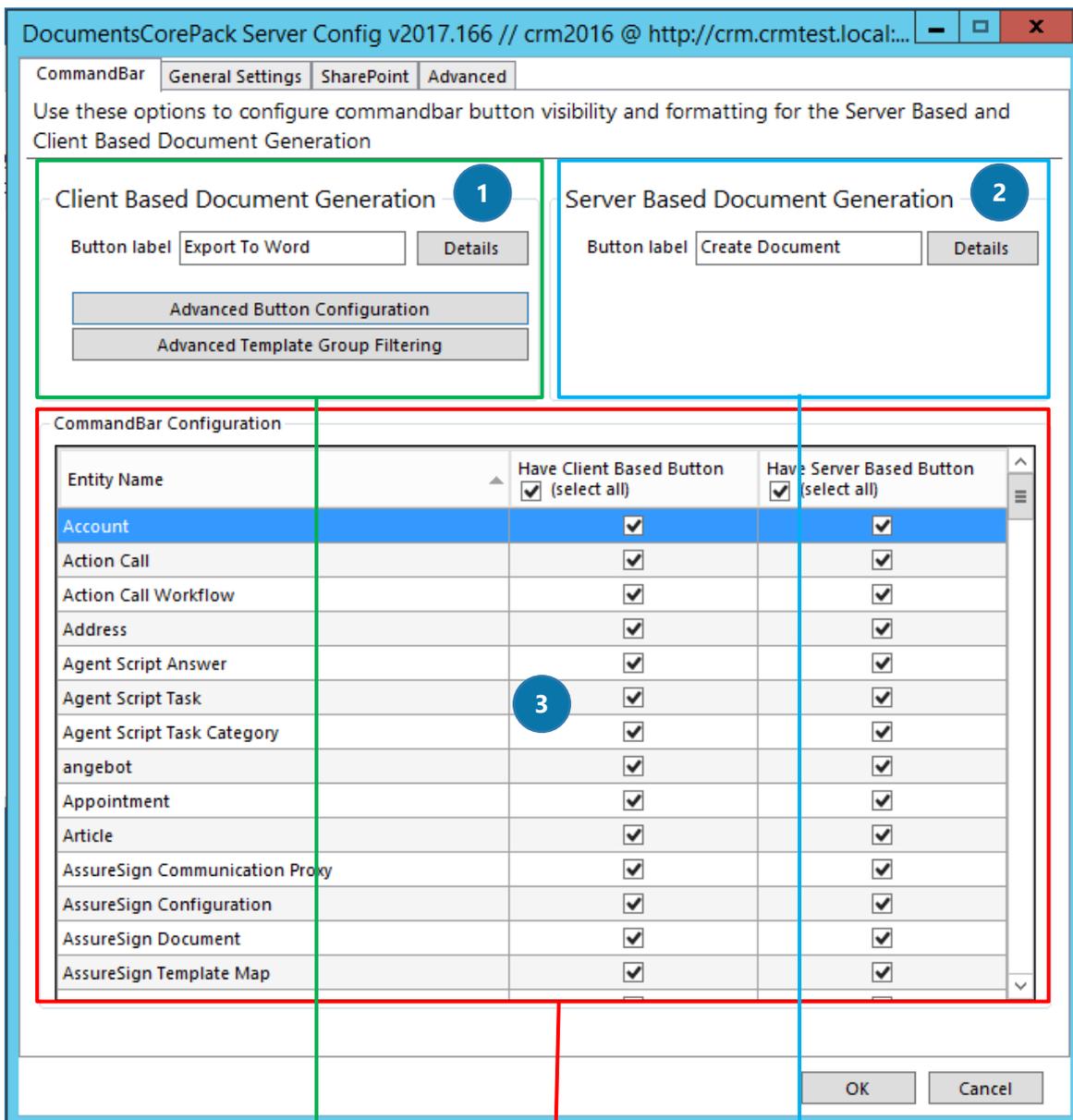


Figure 19: CommandBar-tab



Here users can configure the entities where you want to see:

- The “Export To Word”-button for the Client Based Document Generation as well as
- The “Create Document”-button for the Server Based Document Generation

as well as the display name of these buttons.

## 1 CLIENT BASED DOCUMENT GENERATION

This section contains all settings for Client Based Document Generation.

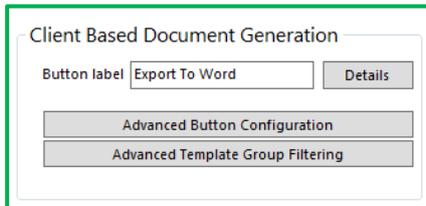


Figure 20: Client Based Document Generation

### Button label

“Export to Word” - here users can define a different name for the DocumentsCorePack Client Based button label. With a click on the **[Details]**-button, the following window appears:

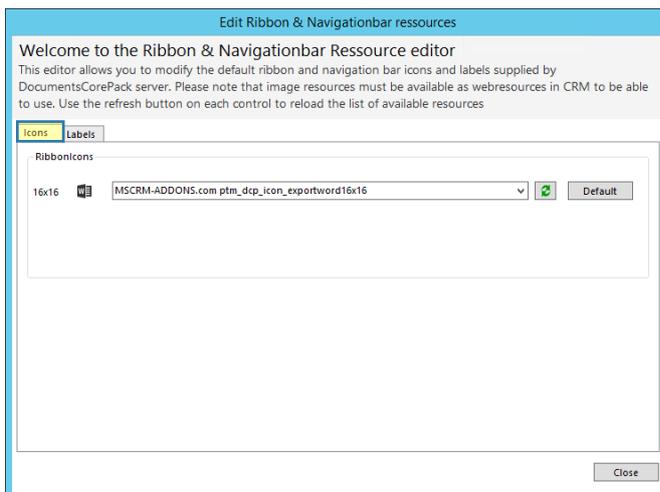


Figure 21: The Ribbon & Navigationbar Resource editor – Icons

This editor allows users to modify the default ribbon and navigation bar icons and labels supplied by DocumentsCorePack server. Please note, that image resources must be available as web resources in Dynamics 365 to be able to use. Use the refresh button on each control to reload the list of available resources.

**Icons:** The *Icons*-tab of this configuration window gives you the possibility to change the icons of the buttons. The icons are Dynamics 365 web resource you can upload some by yourself with the standard Dynamics 365 functionality.

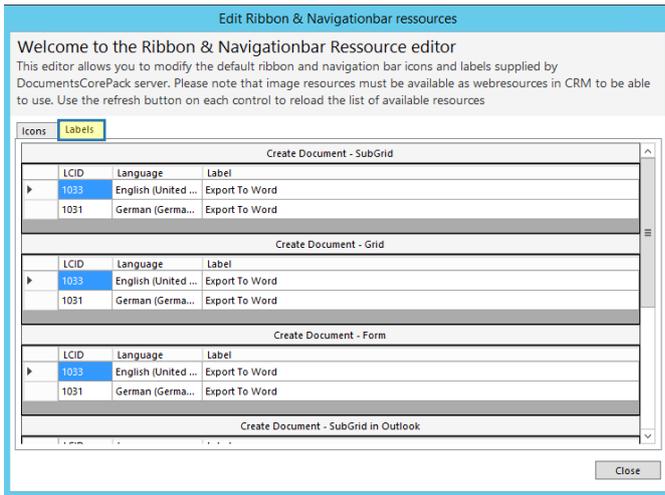


Figure 22: The Ribbon & Navigationbar Ressource editor – Labels

**Labels:** Within this dialog you can set the different labels for the different locations (Grid, Form...) of the "Export to Word" button for the different languages.

### Advanced Button Configuration

When clicking on this button, the Advanced Button Configuration-dialog appears. In this dialog, you can select the entity that you want to manage. E.g. Already existing custom **[Print in Word]**-buttons will be listed and can be deleted.

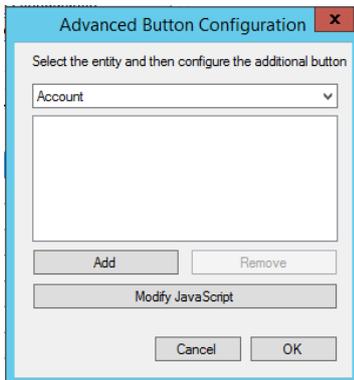


Figure 23: The Advanced Button Configuration

The *Add*-functionality gives you the possibility to define a *custom name* for your button and you can select the JavaScript function that should be executed if you hit the generated button.

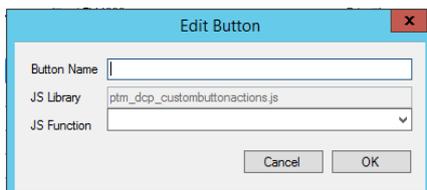


Figure 24: The Add-functionality

More information about the Advanced Button Configuration can be found in the corresponding [blog article](#).

### Advanced Template Group Filtering

This feature offers the possibility to set a filter for DocumentsCorePack templates. For detailed information, please read our [blog article](#).

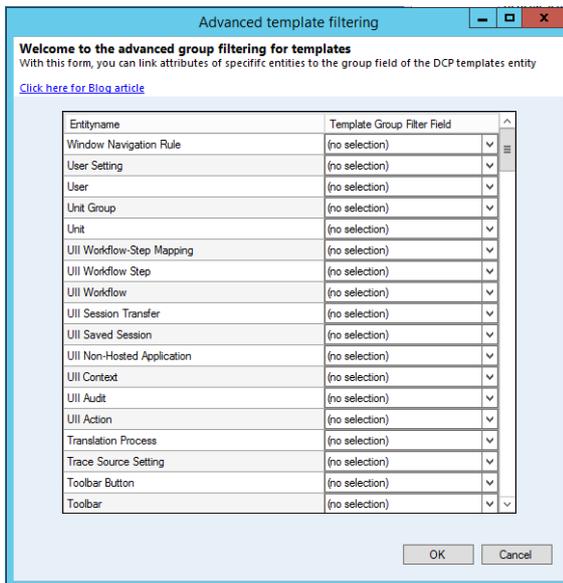


Figure 25: The Advanced template filtering

By saving the changes, following window appears:

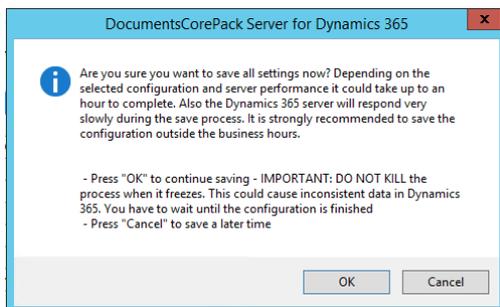


Figure 26: Saving the settings

Click **[OK]** to continue saving the changes, click on **[Cancel]** to cancel the settings.

## 2 SERVER BASED DOCUMENT GENERATION

Our **custom dialog** gives a quick start to server-based document generation. Users can directly after the installation start using the product without the need of designing own process or dialog to see the product in action.

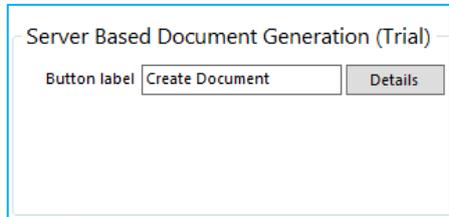


Figure 27: Server Based Document Generation

All our addons come with a 14-days trial license. If the trial license expired the window will look like in the screenshot shown above. Please contact our support team to get the permanent license for DocumentsCorePack Server- and / or Client Based Document Generation & Processing.

For detailed information about licensing, please read [CHAPTER 2.6 LICENSING ON PAGE 29](#).

## 3 COMMANDBAR CONFIGURATION

This part of the configuration allows users to select the entities where the Client Based and or Server Based Button should appear.

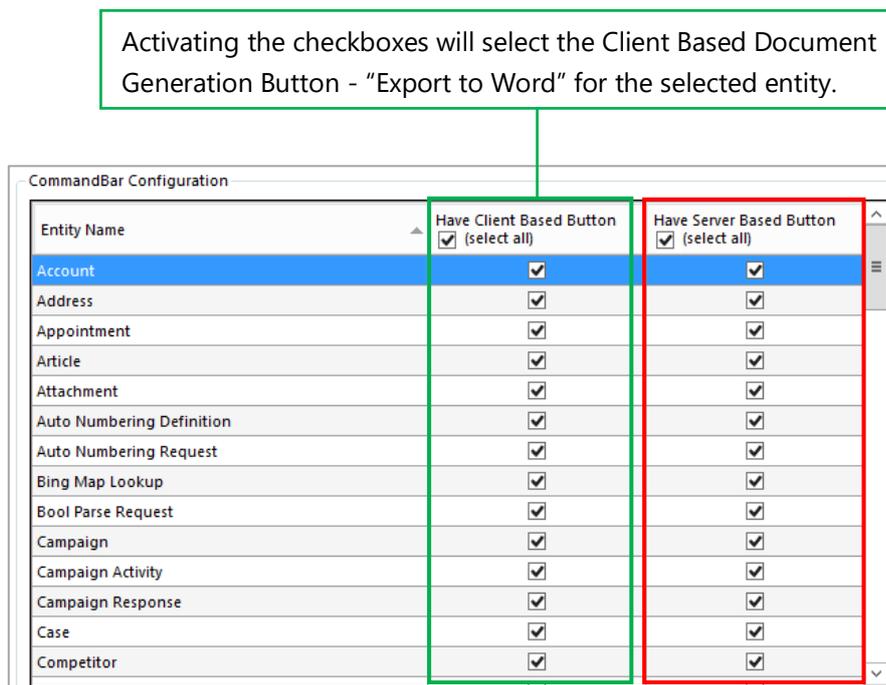


Figure 28: CommandBar Configuration

Activating the checkboxes will select the Server Based Document Generation Button - "Create Document" for the selected entity.

## 2.4.2 The General Settings-tab

In this tab you have the possibility to set up the general settings of your service and to import or export templates, as you can see in the figure below.

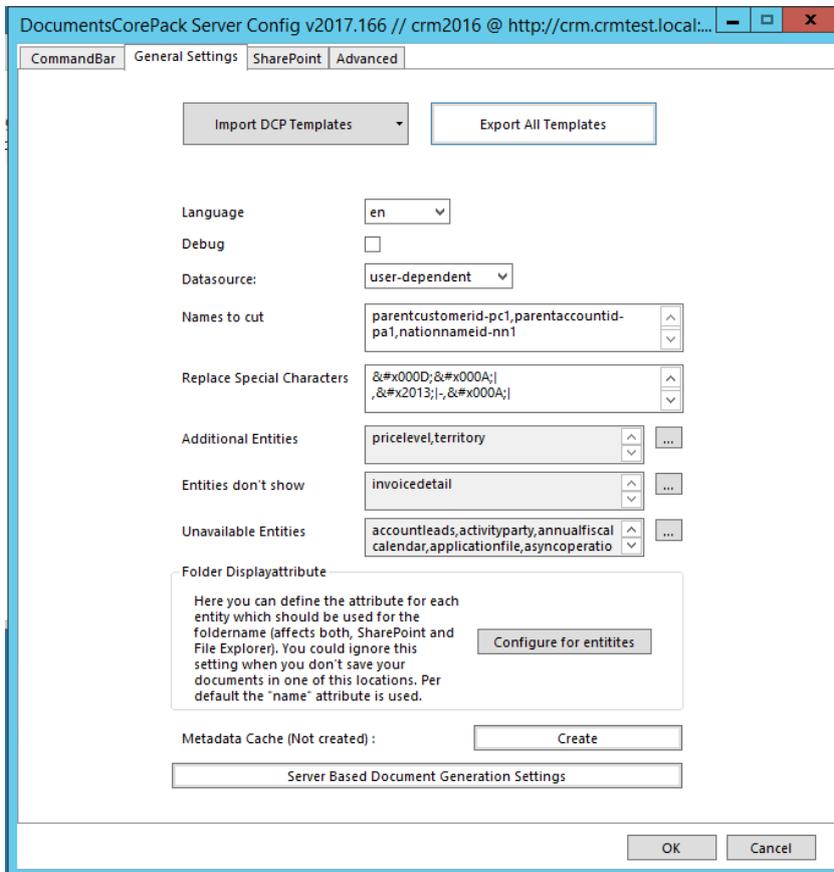


Figure 29: The General Settings-tab

### IMPORT/EXPORT TEMPLATES

For more information about the import/export of DCP templates, please have a look at [CHAPTER 6.2 IMPORT/EXPORT EXISTING DOCUMENTSCOREPACK TEMPLATES ON PAGE 45](#).

### LANGUAGE

You can choose the language from the dropdown-box. Languages are listed in language code (en for English, de for German). To add another language, please have a look at [CHAPTER 7 LANGUAGE SETTINGS FOR DOCUMENTSCOREPACK ON PAGE 48](#).

### DEBUG

Please leave this option unchecked: It is used by our support to simplify bug fixing.

### DATA SOURCE

Here you can select the type of data source. This contains cached information from Dynamics 365, which can be used with the DocumentsCorePack Client.

### NAMES TO CUT

This functionality is deprecated – for detailed information please read our DocumentsCorePack Client User Guide. (.dot). Details on [www.msrm-addons.com](http://www.msrm-addons.com).

#### REPLACE SPECIAL CHARACTERS

Treats special exceptions or certain coding problems with Dynamics 365.

#### ADDITIONAL ENTITIES

DocumentsCorePack only shows customizable entities by default. If you want to use other entities for DocumentsCorePack, you have to define them in here.

#### ENTITIES DON'T SHOW

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

#### UNAVAILABLE ENTITIES

Entities which are not included in the metadata cache.

#### FOLDER DISPLAYATTRIBUTE

Here you can define the attribute for each entity which should be used for the folder name (affects both, SharePoint + File Explorer). You can ignore this setting when you don't save your documents in one of these locations. Per default the "name" attribute is used.

#### 11. METADATA CACHE (NOT CREATED):

Create your metadata and save it to a local location. This is the fastest way to download metadata to the client. **Note:** once created this functionality needs to be updated manually!

#### 12. SERVER BASED DOCUMENT GENERATION SETTINGS

With a click on this button, users will get to the "AutoMerge Config" in DocumentsCorePack to set up a service for Server Based Document Generation in CRM-Online and print jobs. For detailed information, please read [CHAPTER 2.5 SERVICE CONFIGURATION ON PAGE 23](#).

### 2.4.3 The SharePoint-tab

Here, you have the possibility to define your SharePoint settings, if you want to save documents to SharePoint. The SharePoint Integration provided by DocumentsCorePack generates a separate folder in a site or a site for each record and gives you a structured and easy way to add files to your Dynamics 365-records.

*Because Microsoft has introduced his own SharePoint Integration with MS CRM 2011 the SharePoint Integration provided by DocumentsCorePack is depreciated and will not be further developed but can be used by existing customers also in MS CRM 2015. The DocumentsCorePack Client supports both SharePoint Integrations.*

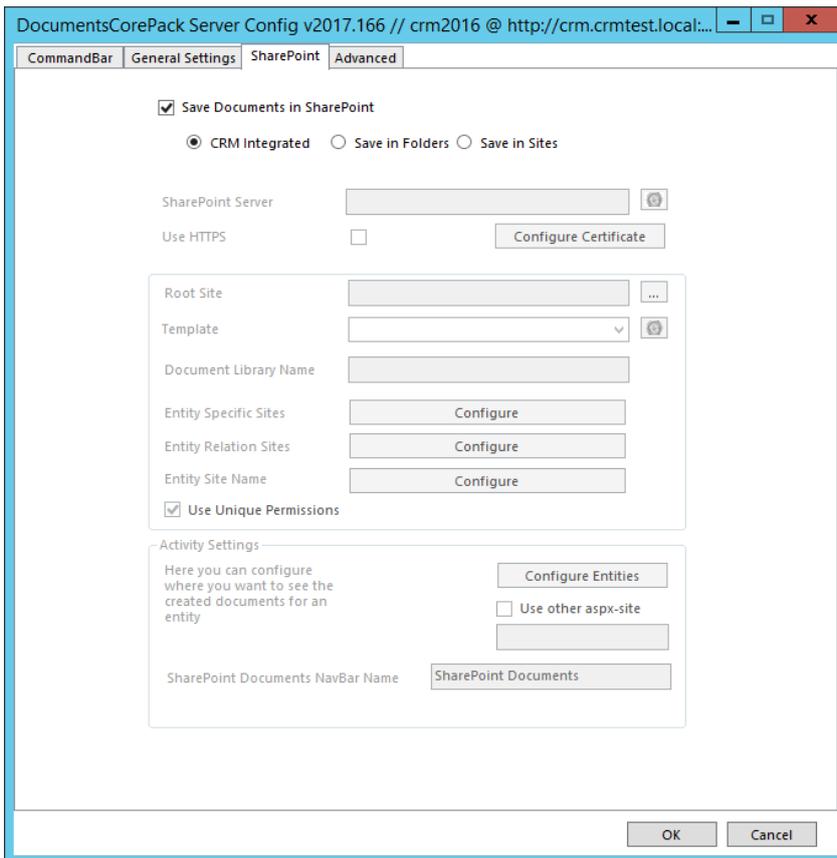


Figure 30: The SharePoint-tab

You can decide between three SharePoint integration options:

#### **CRM Integrated**

You have to configure the SharePoint integration within Dynamics 365 to use this integration. When enabled, the documents generated via the DocumentsCorePack Client will be saved in the Dynamics 365 specified SharePoint location for each record.

## 2.5 Service Configuration

To open the ServiceConfiguration, please search for **“Configuration – DocumentsCorePack for Dynamics 365”** in the Windows start-menu and run this application.

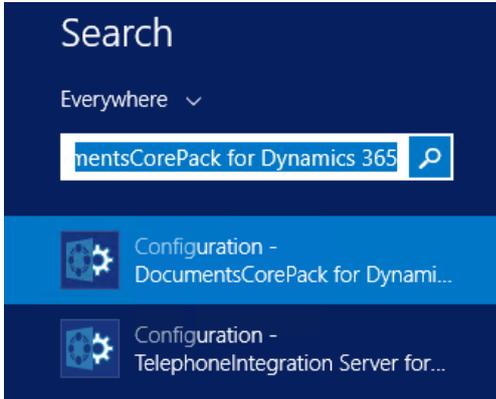


Figure 31: Configuration DCP for Dynamics 365

Another way to get to the Service Configuration is to open the **“ServiceManagement – DocumentsCorePack for Dynamics 365”** in the Start pane. This will open the Organization overview. There, click on the required organization, navigate to the Configurations-dropdown button, choose **Service Configuration** and hit the **[Launch]**-button. See next screenshot:

In the so opened Service Overview-window you have the possibility to Add a New service and lists of your Active Services and Inactive Services.

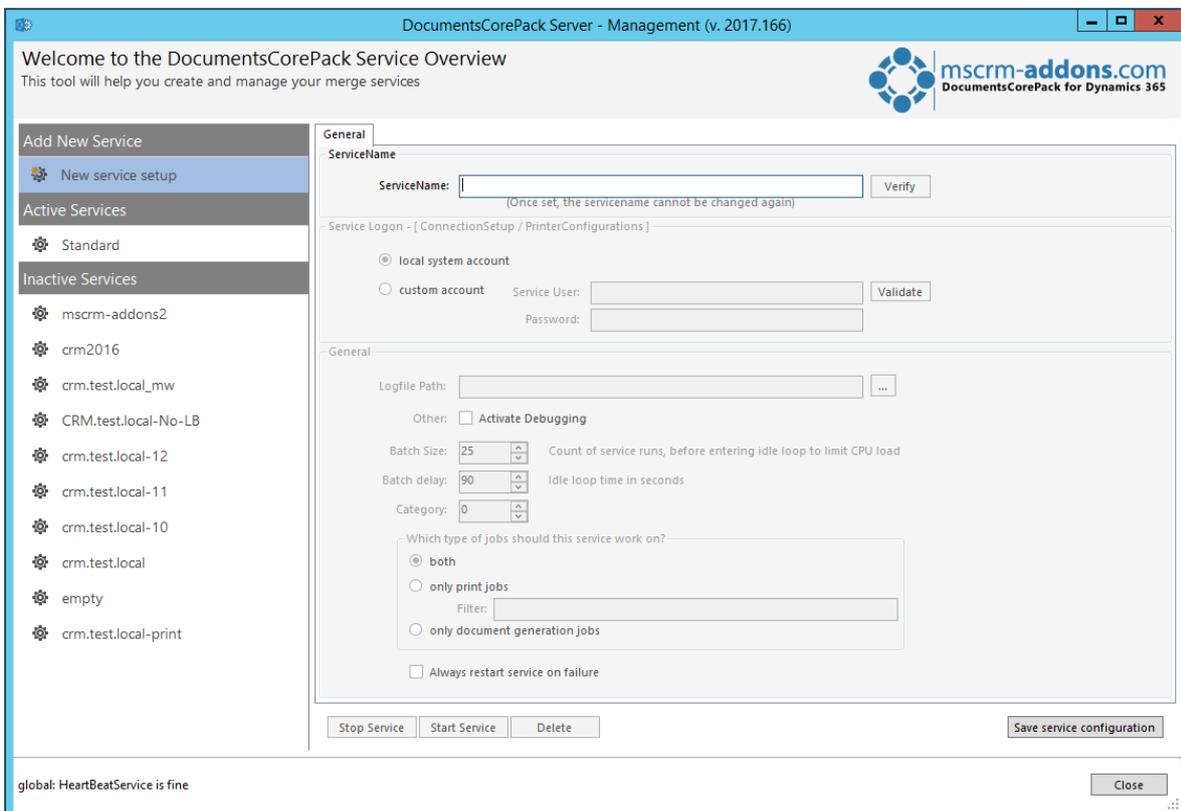


Figure 32: The local DCP Service Overview

### 2.5.1 The General-tab

Within the *General*-tab, (see screenshot below) you are able to put a name for your service and to specify the logfile-path. You are also able to activate debugging if there is a problem with your service. Click on the **[Save service configuration]**-button to continue.

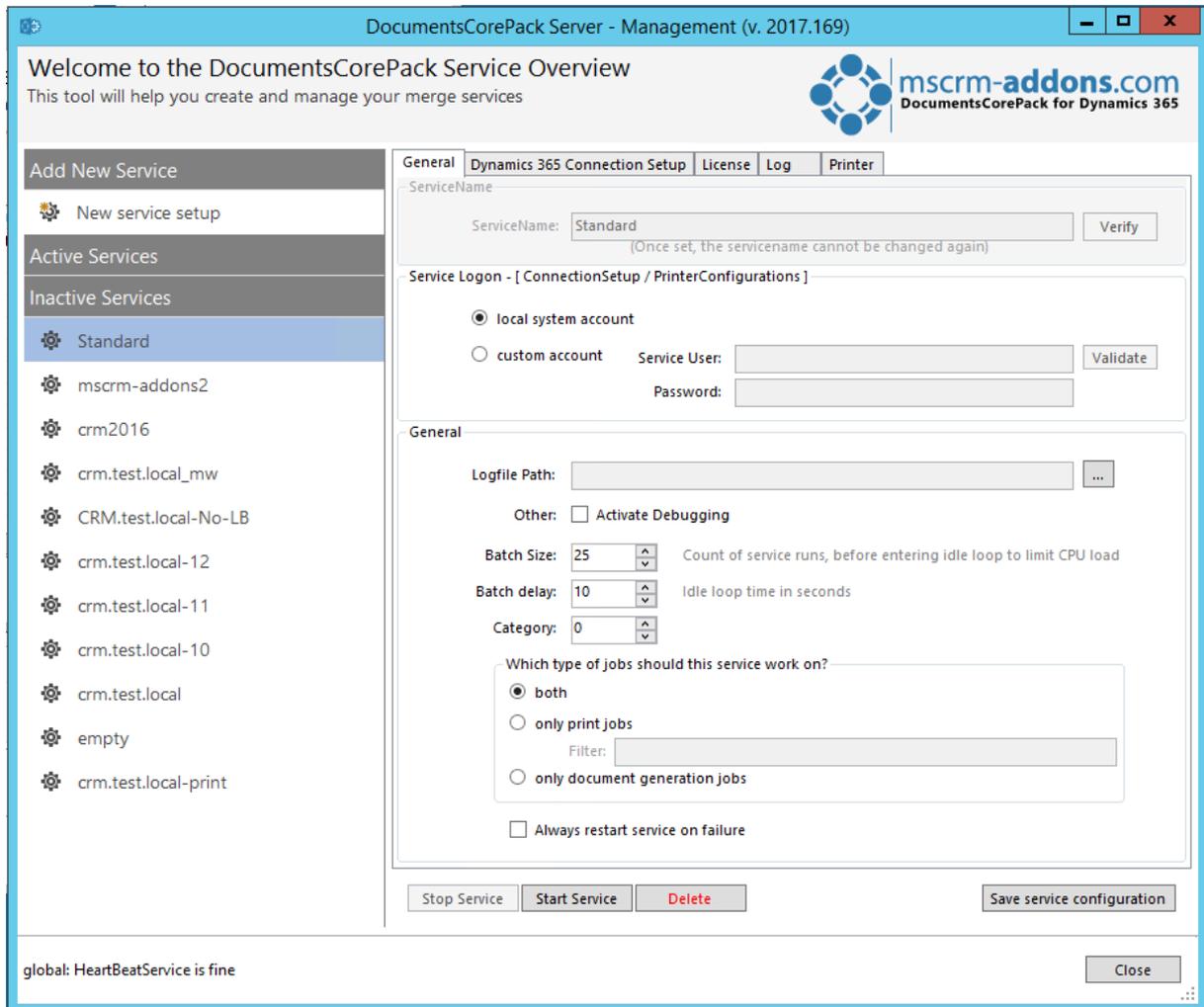


Figure 33: The General-tab

### 2.5.2 The Dynamics 365 Connection Setup-tab

Again, you have to specify your Dynamics 365-connection in the Dynamics 365 Connection Setup. Click on the **[Save service configuration]**-button to continue.

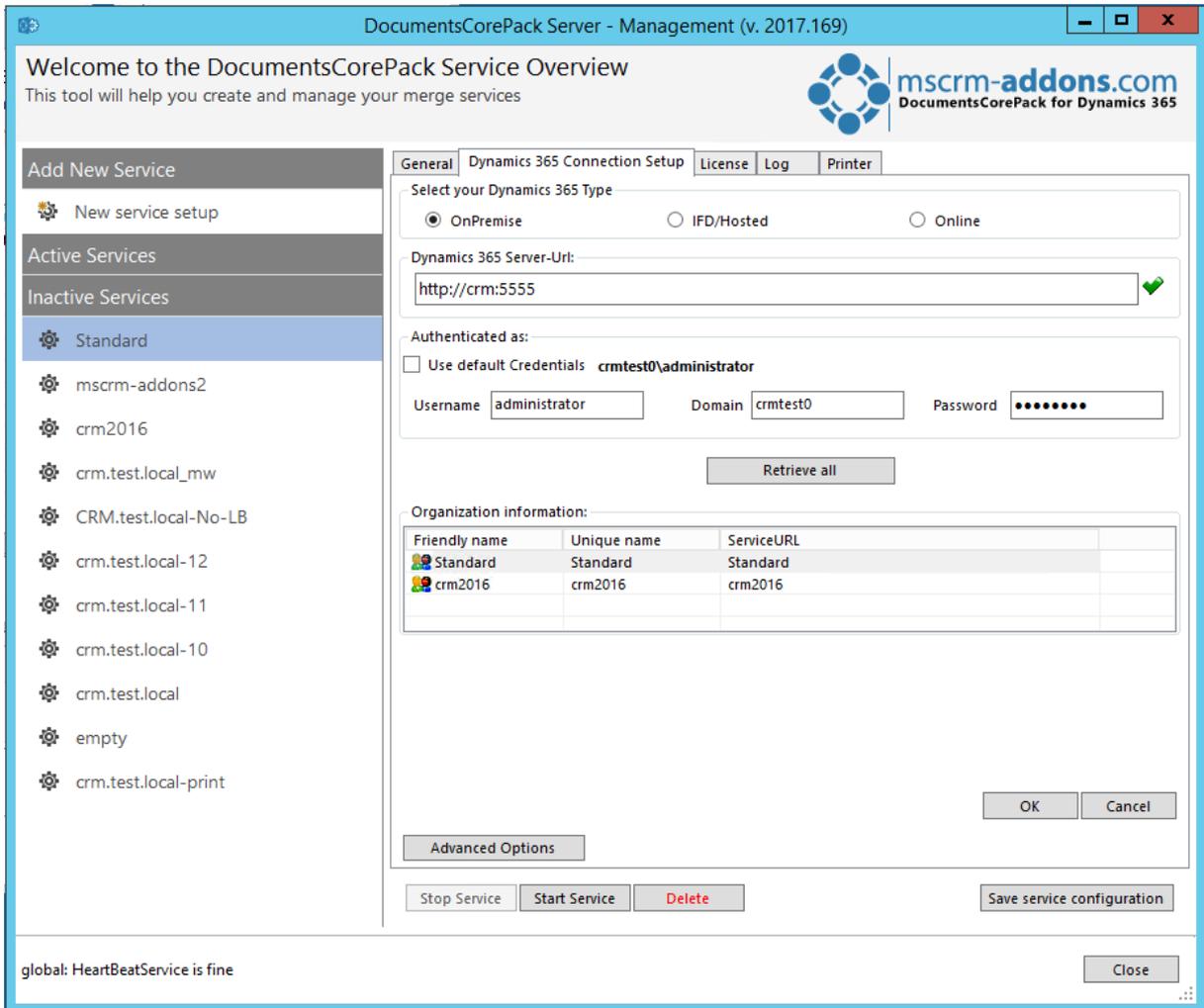


Figure 34: The Dynamics 365 Connection Setup-tab

### 2.5.3 The License-tab

In the *License*-tab, you are able to see the information about your license. In this case our license has expired. You have to update it.

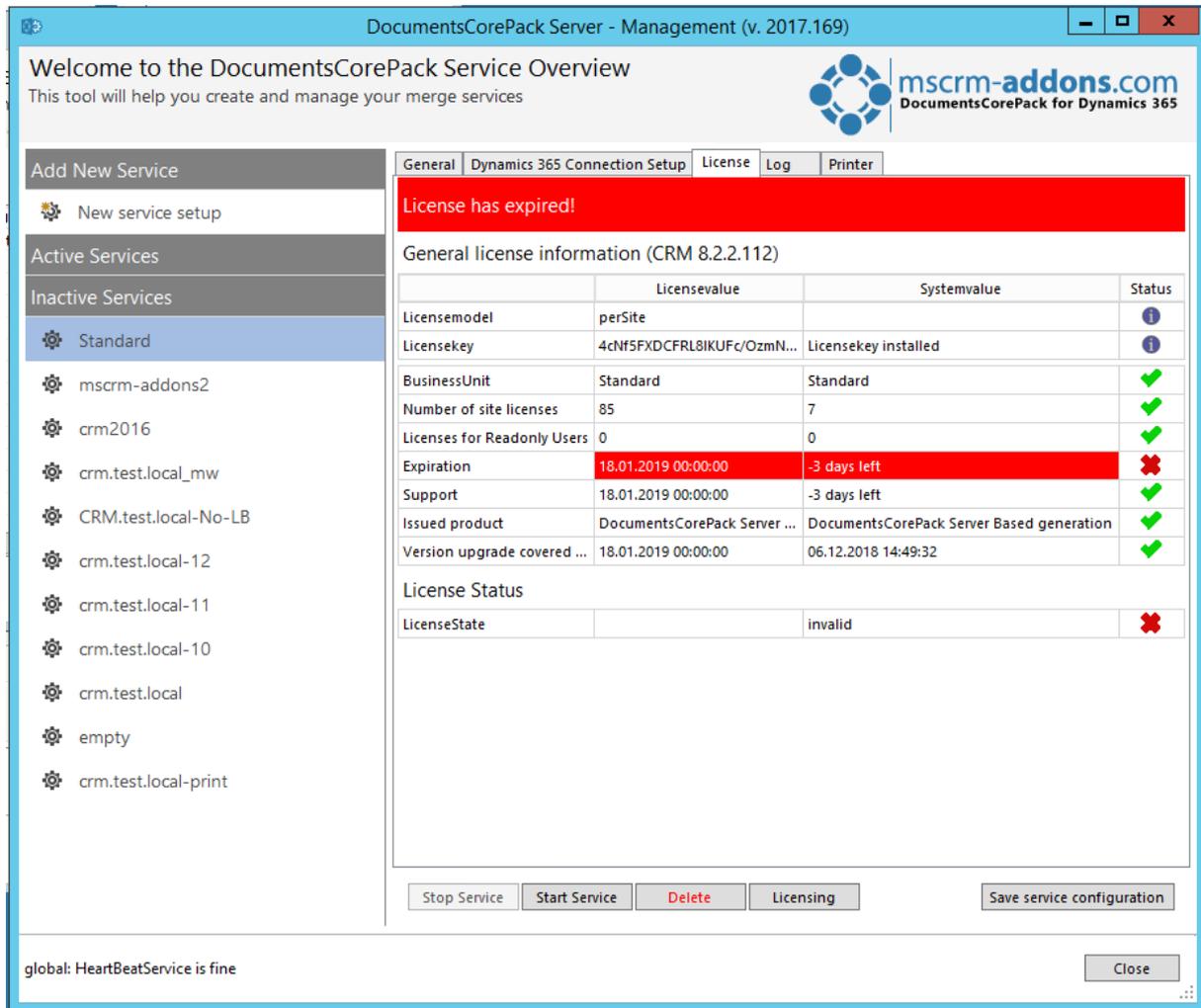


Figure 35: The License-tab

### 2.5.4 The Log-tab

In the *Log*-tab, you are able to see the latest events.

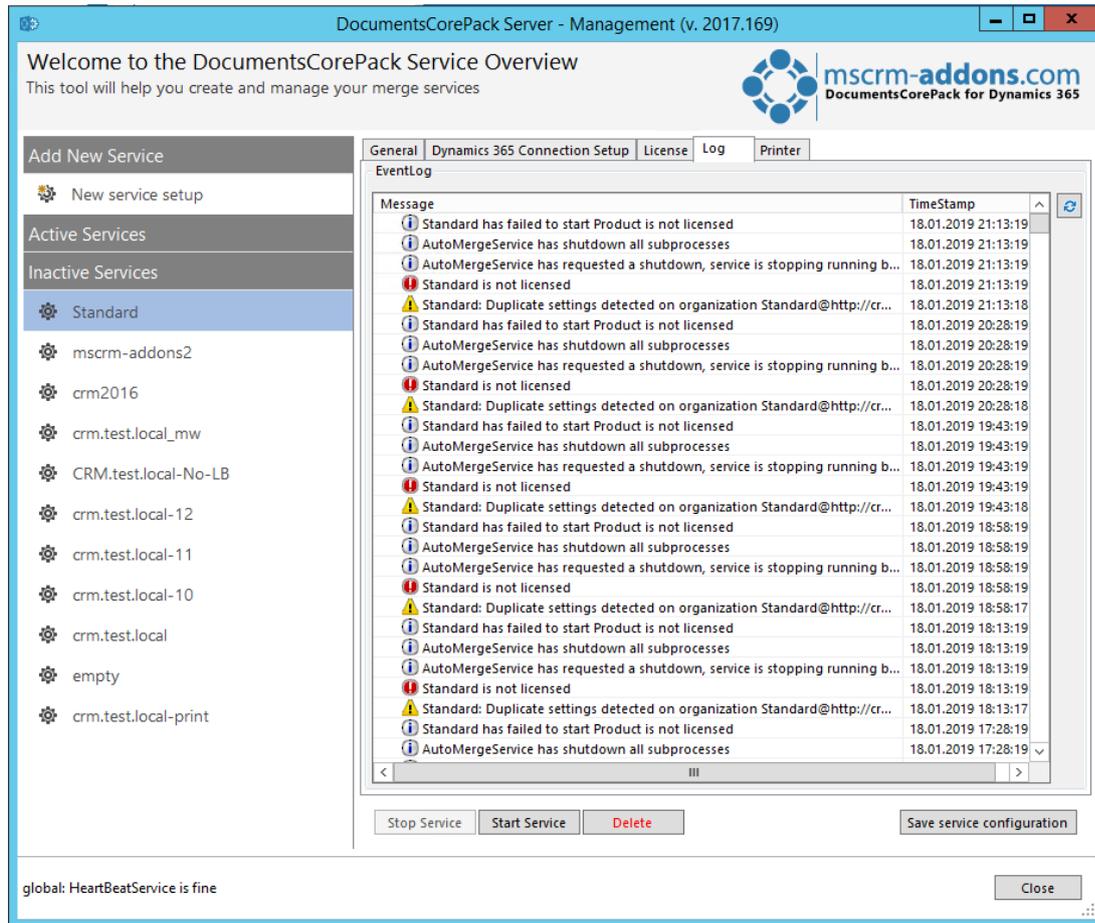


Figure 36: The Log-tab

### 2.5.5 The Printer-tab

DocumentsCorePack now offers a service-based printing option which is available additionally to the already known plugin-based printing-option. The additional option is available within DocumentsCorePack for MS Dynamics CRM 2013 v5.30 and higher and is based on a service which is running in the background.

For more information, please read our DocumentsCorePack ServerBased User Guide chapter 7.3 "Service based printing with DCP SB". Please download on [www.mscrm-addons.com](http://www.mscrm-addons.com).

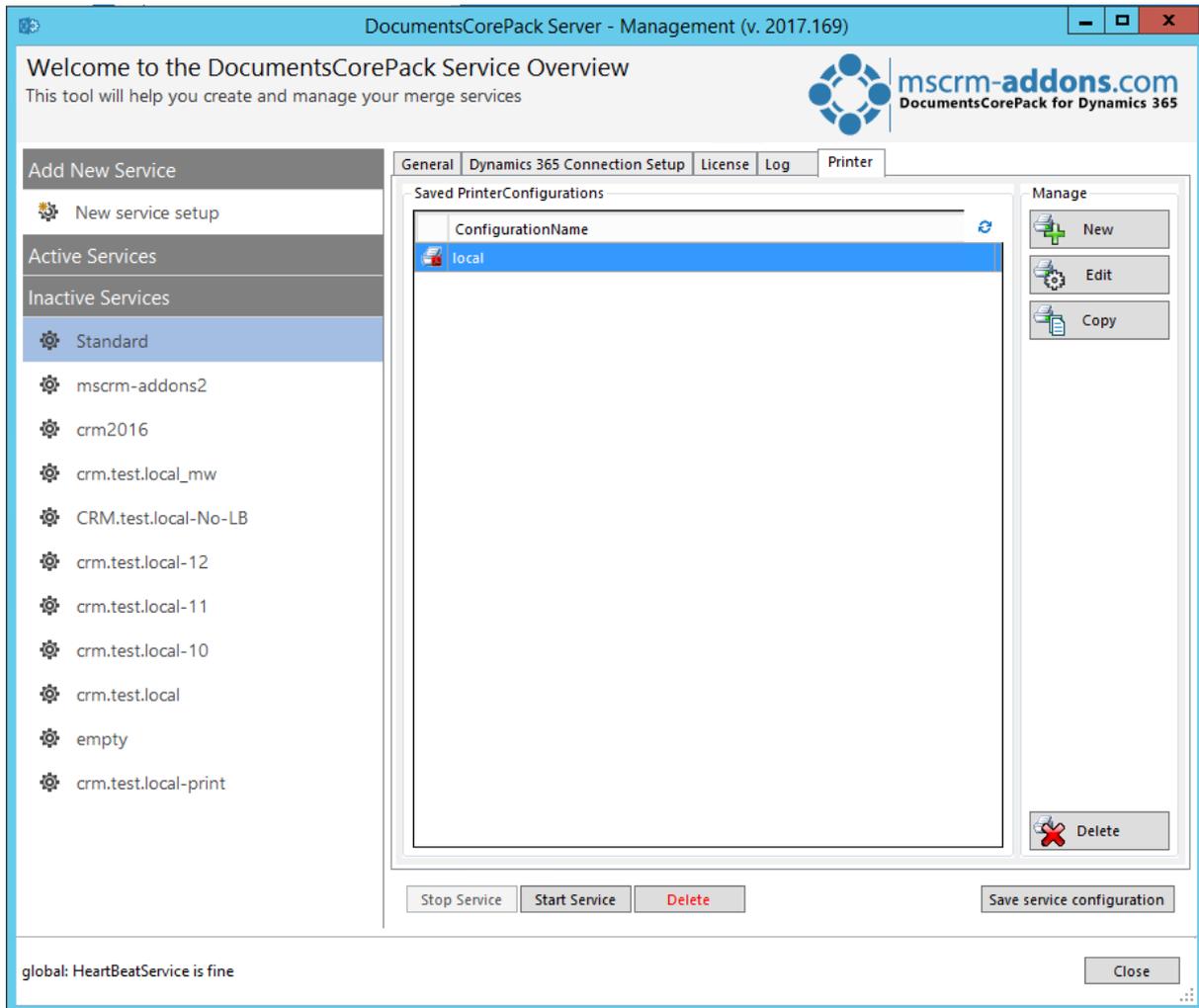


Figure 37: The Printer-tab

## 2.6 Licensing

Depending on your needs we offer Server- and/or Client-licenses. Please also have a look at the corresponding blog article [Licensing Guide for Dynamics 365](#).

If you answer the following questions with "Yes" you need **Server Based** Document generation license:

1. Do you want to generate documents based on a workflow or dialog?
2. Do you want to avoid the installation of a Client Based software on all your user machines?

If you answer the following questions with "Yes" you need a **Client-Based** Document generation license:

1. You want to generate the document in MS Word to confirm or modify before processing?
2. You need to generate documents offline?

### 2.6.1 License for Client Based Document Generation

You can license the "Client-Based" document generation in two different ways.

- **Normal license:** Requires as many licenses as there are active users in Dynamics 365.
- **Per User license:** If you do not want to purchase a license for all your users you should take the per user model. The limitation you have with this model is that you have to purchase initially at least 10 licenses.

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

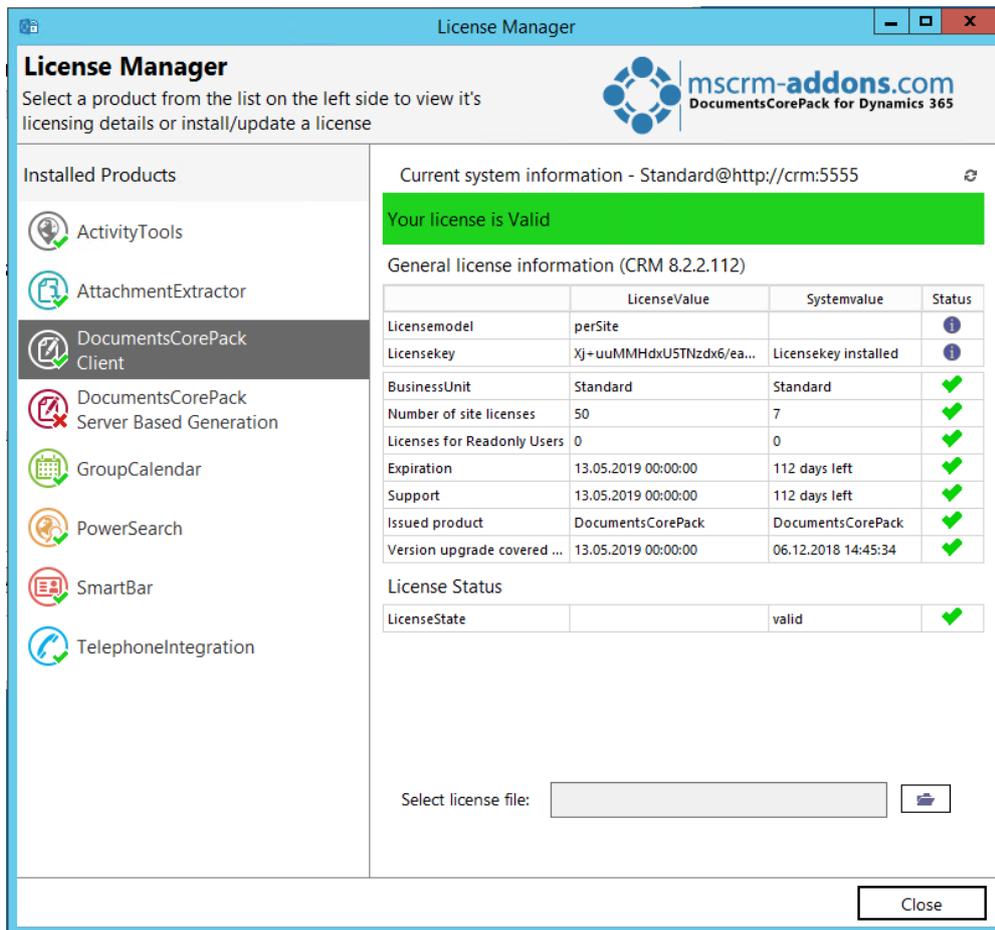


Figure 38: License Manager

If the license isn't installed or if Trial version has been expired, you have to upload the required license text file, sent by our support team with a click on the folder symbol as you can see in the figure below.

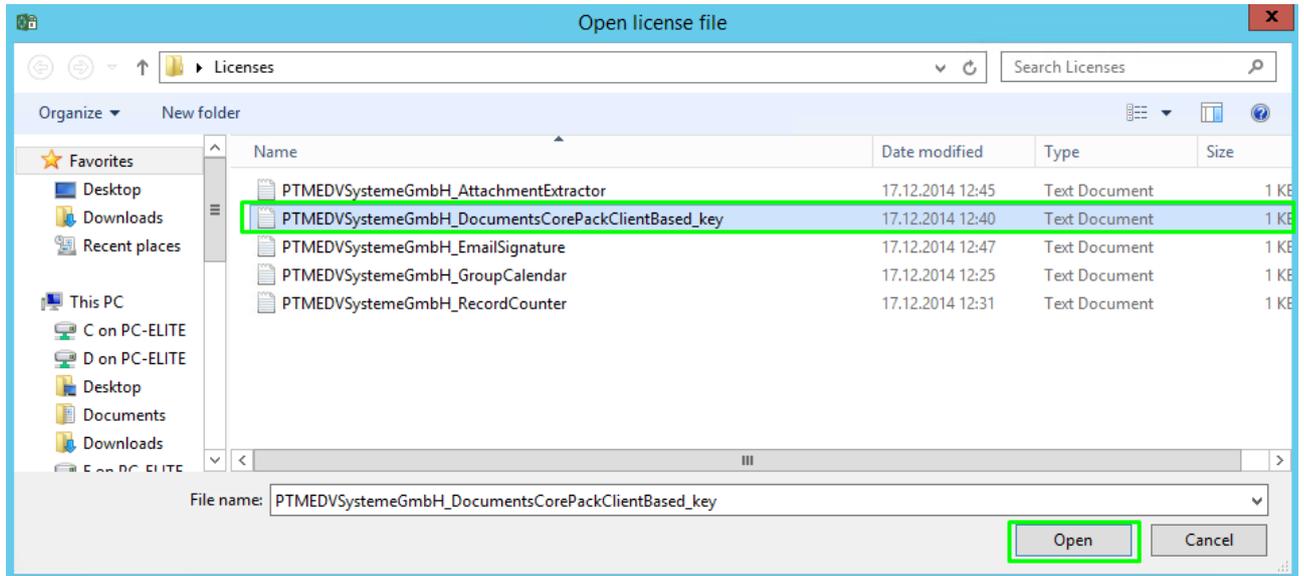


Figure 39: Upload license

Next, click in the *License Preview*-window on the **[Install this]**-button to finish the license installation.

## 2.6.2 License for Server Based Document Generation

The license for the Server Based document generation is based on the number of active users in your Dynamics 365. The Server Based license always comes with one Template Designer license. If you need more, you can purchase additional DocumentsCorePack licenses.

We have two ways to license the Server Based document generation:

### 1. Online Subscription

This is the correct licensing method if you have Dynamics 365 Online and don't want to install anything locally on your environment. Depending on the size of your Dynamics 365 Organization you can decide between Small, Medium, Large and Enterprise. Details can be found [here](#).

### 1. On-Premise purchase

This version can be installed on your Dynamics 365 server (On-Premise or IFD). Depending on the size of your Dynamics 365 Organization you can decide between the different packages. You can find the prices in the navigation on left.

General license information: shows details about the license (validity, type, users) and some facts about the currently used license. If the license isn't installed or if Trial version has been expired the license window looks like follows:

Search for "LicenseManager - DocumentsCorePack for Dynamics 365" in your Start Pane and run the program.

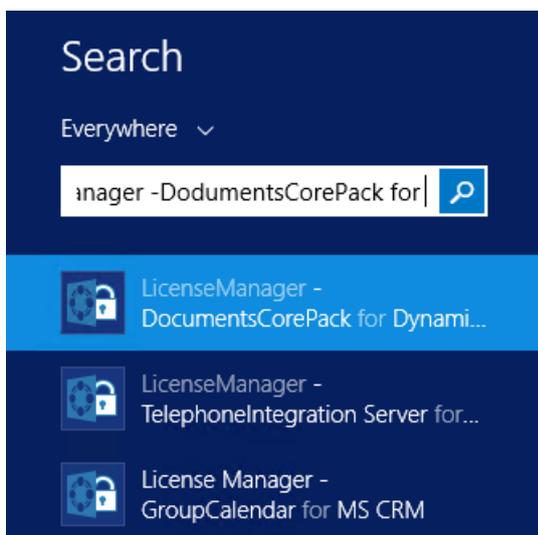


Figure 40: LicenseManager – DCP for Dynamics 365

The Dynamics 365 Connection setup window appears. Choose the appropriate organisation and click on **[OK]**. Normally you just need to hit **[OK]**.

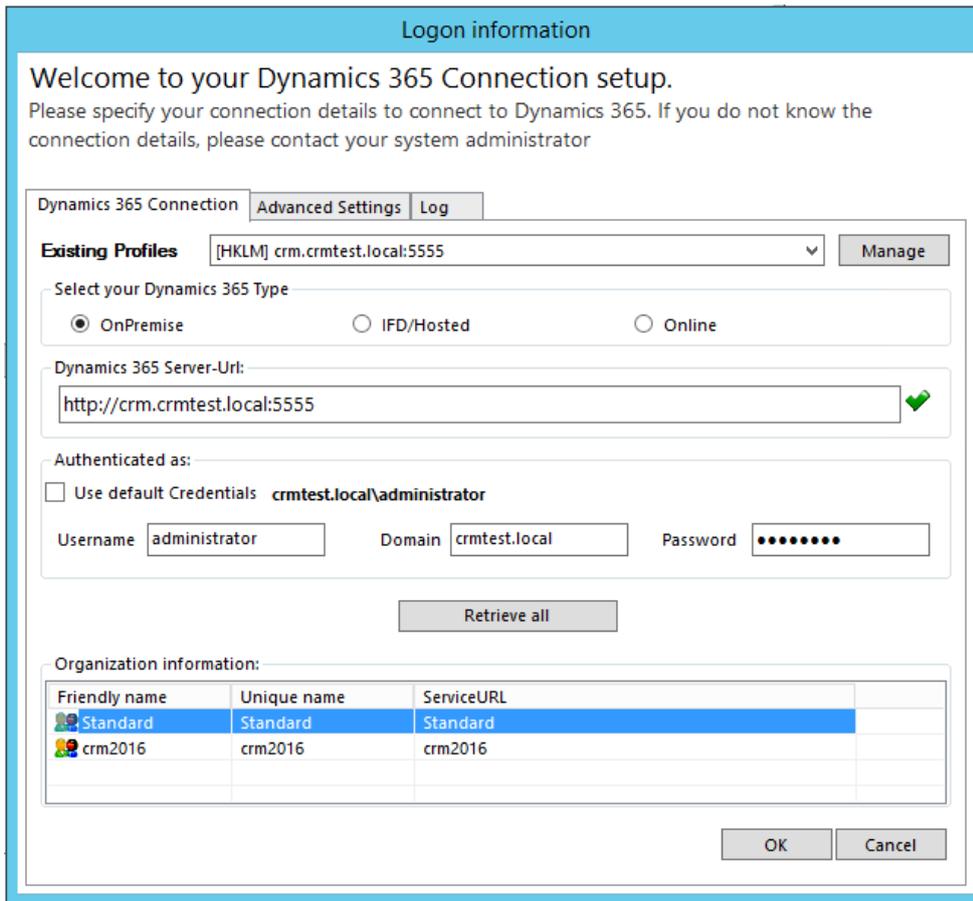


Figure 41: Logon information

In the so opened window navigate to LicenseManager to open the License Manager as you can see in the figure blow.

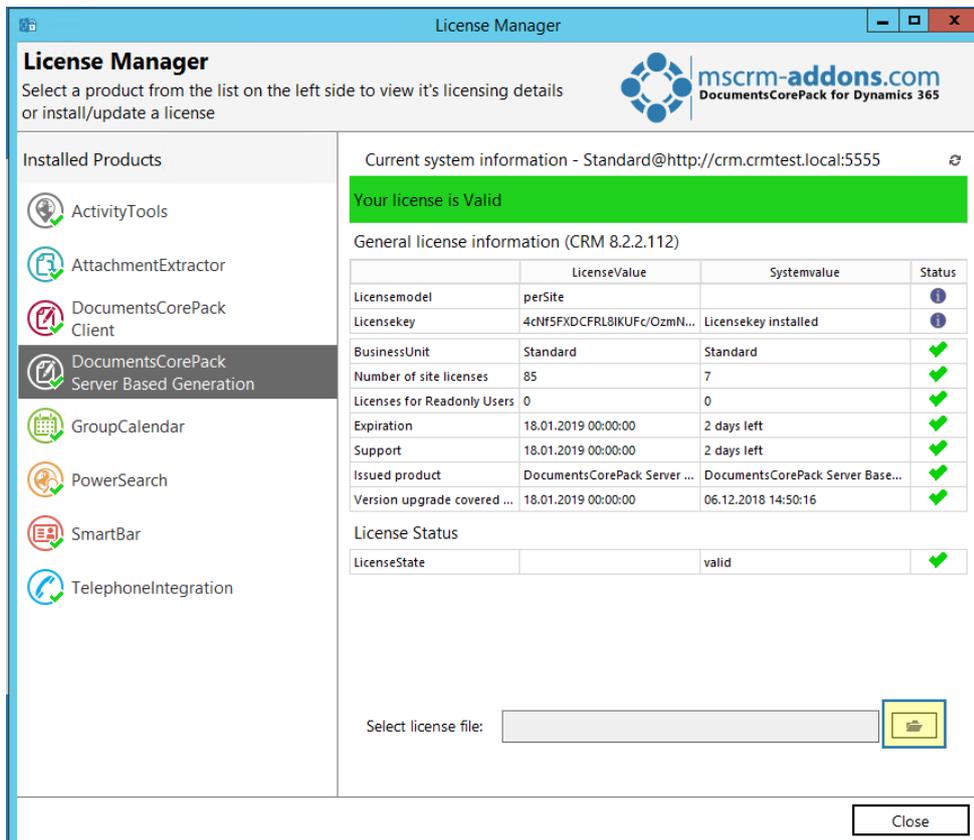


Figure 42: The License Manager

If your license has expired, please upload the license text file, sent by our support-team with a click on the folder-symbol, highlighted in yellow in the figure above.

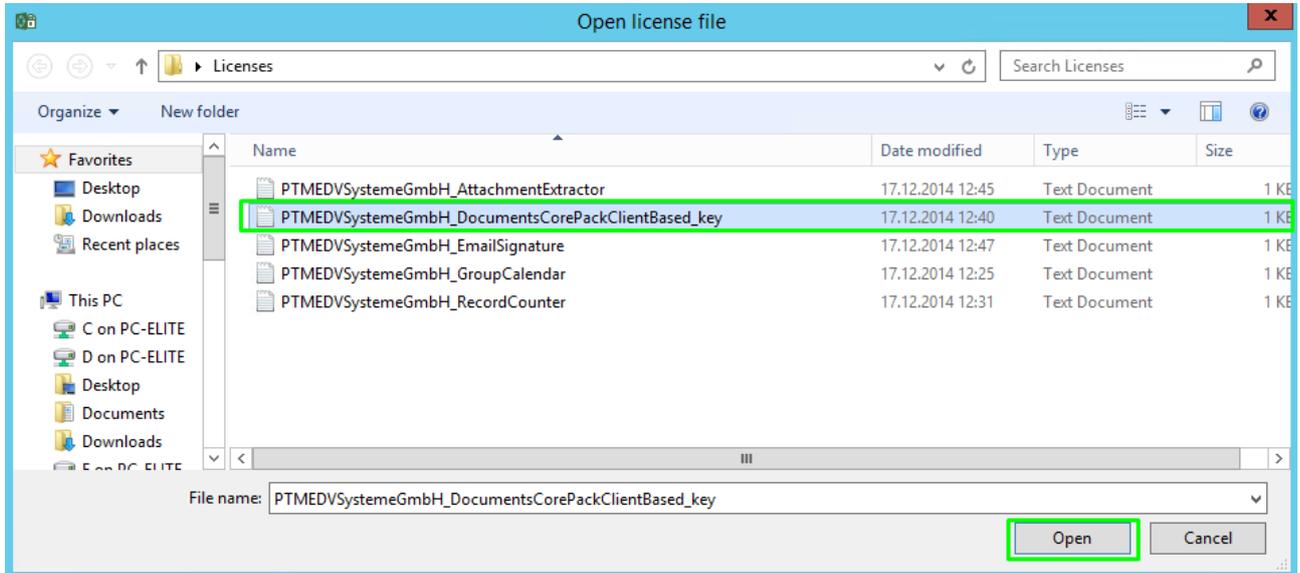


Figure 43: Upload license

Once the permanent license for your mscmr-addons.com solution has been installed the window looks like in figure 63:

## 2.7 Upgrade

For upgrading your DocumentsCorePack version, just rerun the setup. The final step of the upgrade is to execute the DocumentsCorePack Configuration as shown in [CHAPTER 2.4 CLIENT & SERVER BASED GENERATION SETTINGS ON PAGE 15](#). **The configuration is necessary to upgrade DocumentsCorePack properly!**

### 3 How to install DCP in an IFD/Claims-based environment

In this chapter we will walk you through the required steps to install DocumentsCorePack in an IFD/Claims-based-environment.

You need to have the following downloads present to successfully setup the addon:

- IFD-Tool -> [Download Link](#) you need to have a login on our web site
- For installing DocumentsCorePack you need at least version 5.18 from our [Download Section](#)

Before you start installing, Dynamics 365 is required to be working correctly in IFD/Claims-Mode, including your ADFS, which should be installed correctly and configured to work with Dynamics 365.

More details on how to configure MSCRM for IFD/Claims can be found in the Microsoft Guide "Configuring Claims-based Authentication for Microsoft Dynamics CRM 2011" [Download](#)

The following system configuration is the basis for our guide. Your setup will differ in these URLs, make sure you are replacing the URLs with your own URLs when following the guide.

- Internal Url used to access Microsoft Dynamics CRM:  
`https://internalcrm.rc1ifd.ptm-edv.at`
- External Url used to access Microsoft Dynamics CRM:  
`https://[orgname].rc1ifd.ptm-edv.at`
- AD FS Server: `https://win2008domain.ptm-edv.at`
- The Addon itself also requires a dns name:  
`https://documentscorepackserver.rc1ifd.ptm-edv.at`

Basic installation/configuration of our addon:

**ATTENTION:** There is no IFD Configuration required for DocumentsCorePack for MS CRM 2015 Installation

1. Install the addon on the Dynamics 365 Server.
2. You will be asked for the Logon Information. Fill in the internal IFD name of your Dynamics 365. In our case it is `internalcrm.rc1ifd.ptm-edv.at` – select the organization on which you want to install the addon and click on **[OK]**.

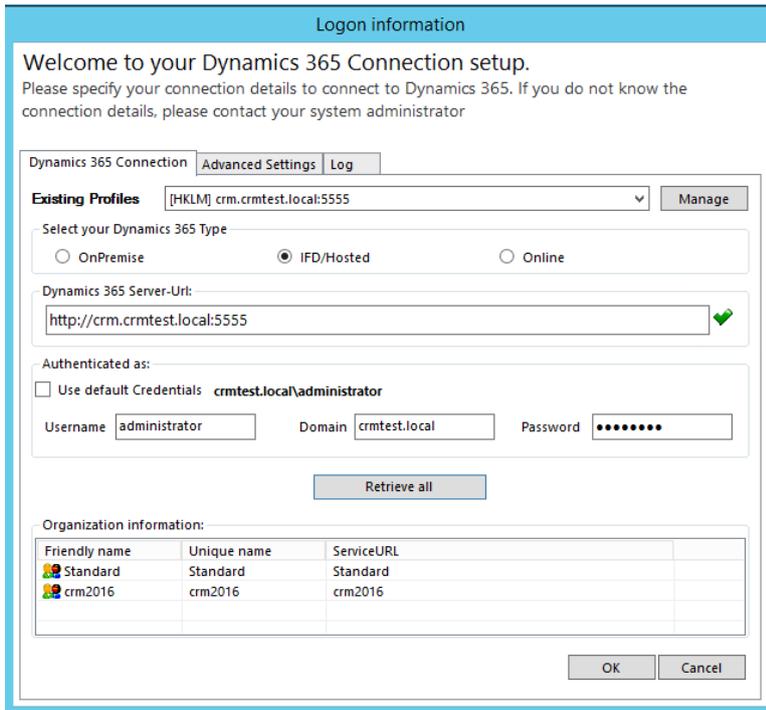


Figure 44: Logon information: IFD/Hosted Connection

3. After the installation is finished you have to open the IIS (inetmgr.exe ) and go to the Sites -> the Addon Website. Right click the DocumentsCorePackserver - WebSite and select "Edit Bindings...".

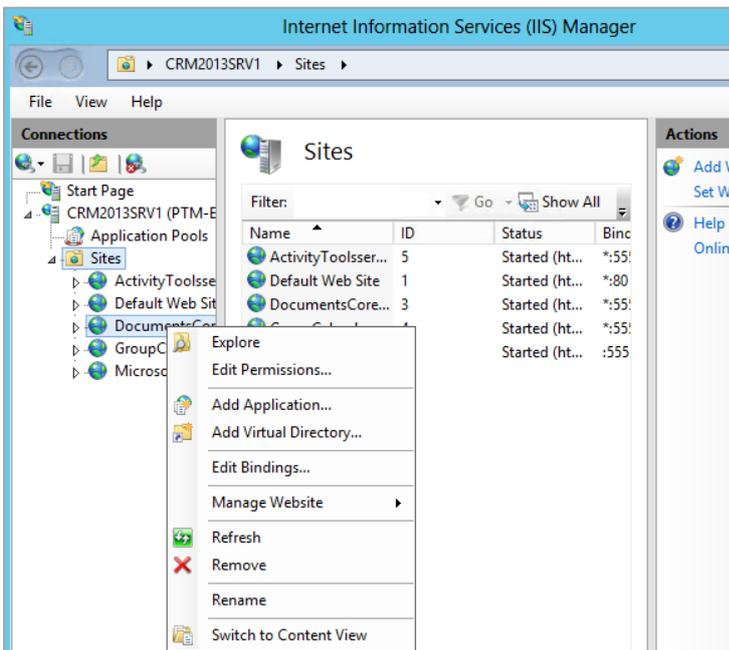


Figure 45: Internet Information Services

On the bindings click on "Add..." and select the type "https" in the "Add Site Binding". You also have to specify the port. In our example we use 4446.

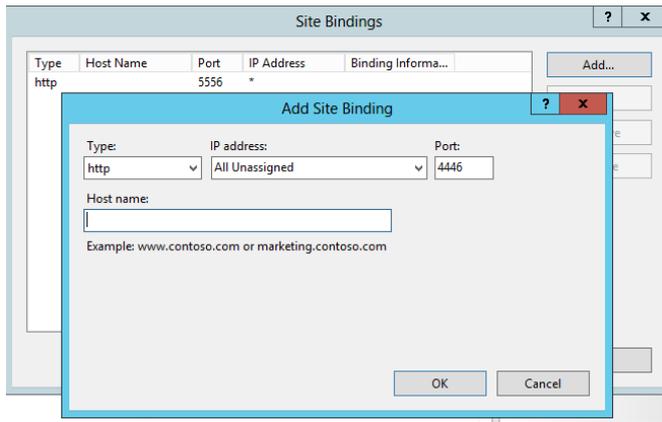


Figure 46: Add Site Bindings

With this step, we made the web site available for https. Click on the **[OK]**-button.

4. Reselect the addon website and double click on the "Authentication" item on the right-side details pane. Verify that the options "Anonymous" and "ASP.Net Impersonation" settings are enabled.

5. The addon Url needs to be added to your DNS Server. Your DNS-servers have to resolve the documentscorepackserver.[your-domain] names correctly. That means that they should resolve it with the same IP address as your Dynamics 365 Server has. If you have an external DNS, make sure that both, the external and the internal DNS, are able to resolve the URL.

6. Extract the IFD-Tool (zip-file) that you downloaded before and execute the

IFDSetupWizard.exe. Follow the steps in the IFD Setup carefully.

7. Open your Dynamics 365 in the Internet Explorer and go to "Settings" -> "MSCRMADDONS.com Products" -> Open the Addon -> in the MSCRM-ADDONS.com Products from select the MSCRM-ADDONS.com Settingskeys and search for the "WebApplicationPort" entry.

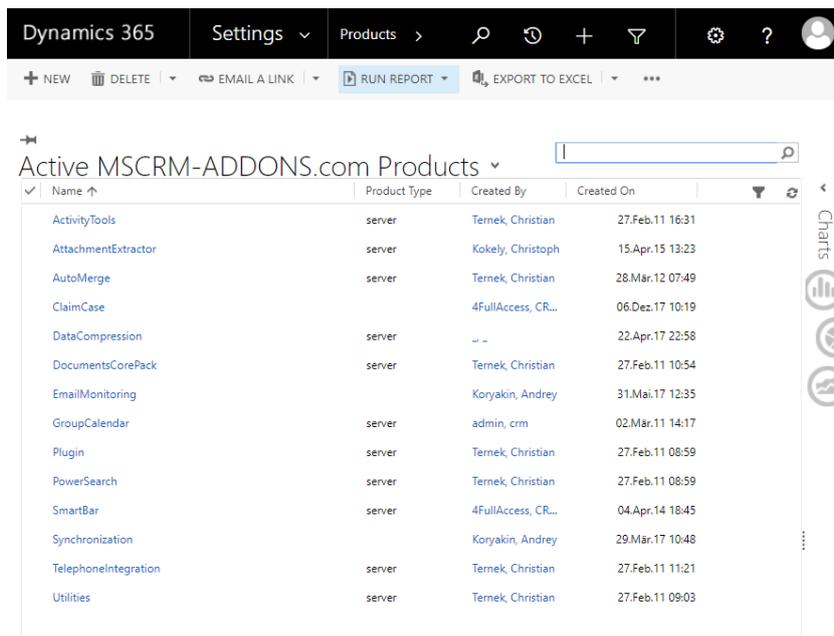


Figure 47: Active MSCRM-ADDONS.com Products

8. Open the WebApplicationPort and replace the existing KeyValue with the following:  
[httpsPort][httpPort][claimsbased][addonname][debugging],  
e.g.: 4446|5557|true|activitytoolsserver|false

We have finished the configuration of the Dynamics 365 Part and now need to **configure the ADFS**.

1. Please logon your AD FS Server and start AD FS 2.0 Management.
2. On the action menu located in the right column, click "Add Relying Party Trust".
3. In the "Add Relying Party Trust"-wizard, click "Start"
4. On the "Select Data Source" page, click "Import data about the relying part published online or on a local network" and then type in the URL to locate the "federationmetadata.xml" file.

This federation metadata is created with the IFD-tool on the Dynamics 365 server. For example, <https://activitytoolsserver.rc1ifd.ptmedv.at:4446/FederationMetadata/200706/FederationMetadata.xml>

Type this URL in your browser and verify that no certificate-related warnings appear.

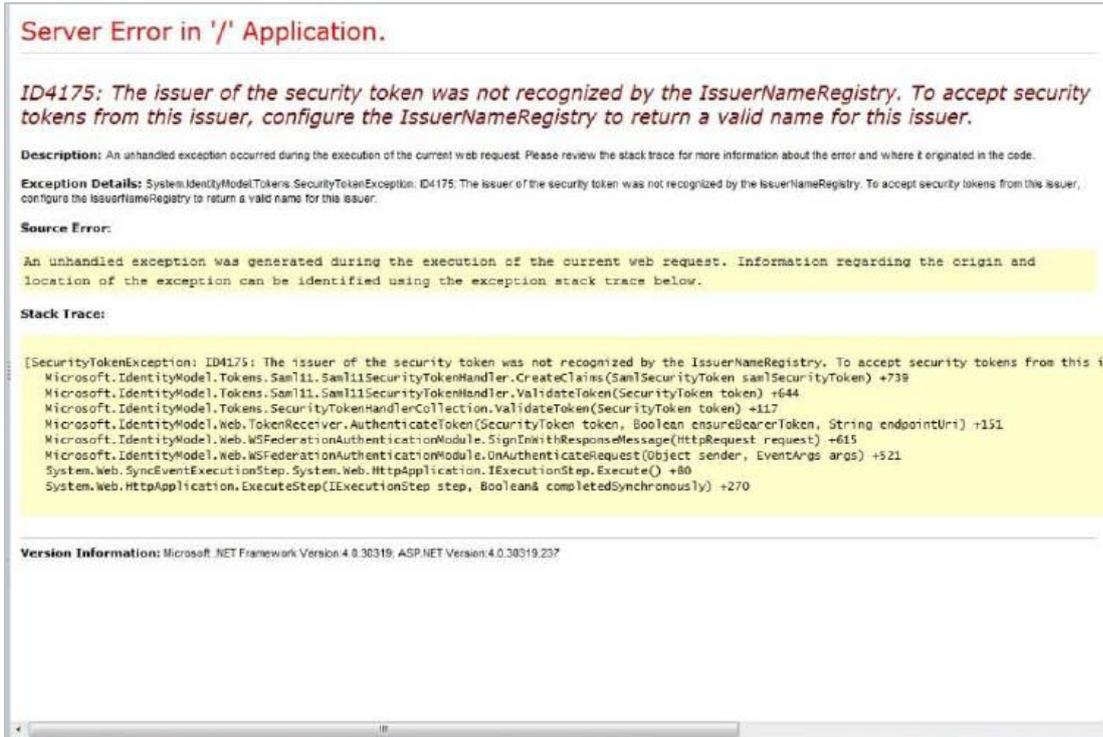
5. Click "Next".
6. On the "Specify Display Name" page, type in a display name such as DocumentsCorePack IFD, and click on "Next".
7. On the "Choose Issuance Authorization Rules" page, leave the "Permit all users to access this relying party" option selected and then click "Next".
8. On the "Ready to Add Trust" page, click "Next", and then click "Close".
9. If the "Rules Editor" appears, click on "Add Rule". Otherwise, in the "Relying Party Trusts" list, right-click the relying party object that you created, click "Edit Claims Rules" and then click "Add Rule". **Important:** Be sure that the "Issuance Transform Rules" tab is selected.
10. In the "Claim rule template" list, select the "Pass Through or Filter an Incoming Claim" template, and then click "Next".
11. Create the following rule:
  - Claim rule name: Pass Through UPN (or something descriptive)
  - Add the following mapping:
    - i. Incoming claim type: UPN
    - ii. Pass through all claim values
12. Click "Finish".

13. In the *"Rules Editor"*, click *"Add Rule"* and in the *"Claim rule template"* list select the *"Pass Through or Filter an Incoming Claim"* template. Then click *"Next"*:
  - Claim rule name: Pass Through Primary SID (or something descriptive)
  - Add the following mapping:
    - i. Incoming claim type: Primary SID
    - ii. Pass through all claim values
14. Click Finish.
15. In the *"Rules Editor"*, click *"Add Rule"*.
16. In the *"Claim rule template"* list, select the *"Transform an Incoming Claim"* template and then click *"Next"*.
17. Create the following rule:
  - Claim rule name: Transform Windows Account Name to Name (or something descriptive)
  - Add the following mapping:
    - i. Incoming claim type: Windows account name
    - ii. Outgoing claim type: Name
    - iii. Pass through all claim values
18. Click *"Finish"* and when you have created all three rules, click on *"OK"* to close the *"Rules Editor"*.

You have finished the configuration and you should be able to use the Addon in your IFD/Claims Environment now.

## 4 Troubleshooting

If you see the following error message, there may be two reasons for this:



**Server Error in '/' Application.**

**ID4175: The issuer of the security token was not recognized by the IssuerNameRegistry. To accept security tokens from this issuer, configure the IssuerNameRegistry to return a valid name for this issuer.**

**Description:** An unhandled exception occurred during the execution of the current web request. Please review the stack trace for more information about the error and where it originated in the code.

**Exception Details:** System.IdentityModel.Tokens.SecurityTokenException: ID4175: The issuer of the security token was not recognized by the IssuerNameRegistry. To accept security tokens from this issuer, configure the IssuerNameRegistry to return a valid name for this issuer.

**Source Error:**

An unhandled exception was generated during the execution of the current web request. Information regarding the origin and location of the exception can be identified using the exception stack trace below.

**Stack Trace:**

```
[SecurityTokenException: ID4175: The issuer of the security token was not recognized by the IssuerNameRegistry. To accept security tokens from this issuer, configure the IssuerNameRegistry to return a valid name for this issuer.]
Microsoft.IdentityModel.Tokens.Saml11.Saml11SecurityTokenHandler.CreateClaims(SamlSecurityToken samlSecurityToken) +739
Microsoft.IdentityModel.Tokens.Saml11.Saml11SecurityTokenHandler.ValidateToken(SecurityToken token) +644
Microsoft.IdentityModel.Tokens.SecurityTokenHandlerCollection.ValidateToken(SecurityToken token) +117
Microsoft.IdentityModel.Web.TokenReceiver.AuthenticateToken(SecurityToken token, Boolean ensureBearerToken, String endpointUri) +151
Microsoft.IdentityModel.Web.WSFederationAuthenticationModule.SignInWithResponseMessage(HttpRequest request) +615
Microsoft.IdentityModel.Web.WSFederationAuthenticationModule.OnAuthenticateRequest(Object sender, EventArgs args) +521
System.Web.SyncEventExecutionStep.System.Web.HttpApplication.IExecutionStep.Execute() +80
System.Web.HttpApplication.ExecuteStep(IExecutionStep step, Boolean& completedSynchronously) +270
```

**Version Information:** Microsoft .NET Framework Version: 4.0.30319; ASP.NET Version: 4.0.30319.237

Figure 48: Error message

### Reason 1:

This indicates you are using a wrong certificate for the ADFS signing. Make sure the thumbprint in the web.config matches the one the token signing certificate in ADFS.

```
<issuerNameRegistry
type="Microsoft.IdentityModel.Tokens.ConfigurationBasedIssuerNameRegistry,
Microsoft.IdentityModel, Version=3.5.0.0, Culture=neutral,
PublicKeyToken=31bf3856ad364e35">
  <trustedIssuers>
    <add thumbprint="37a59abae1a394ffd8f0fd750c2e38e98069e349"
name="http://win2008domain.ptm-edv.at/adfs/services/trust" />
  </trustedIssuers>
</issuerNameRegistry>
```

### Reason 2:

This error could also indicate access rights problems with the certificates private key (Mainly an issue for self-signed certificates).

Open your certificate store on the server (MMC, add certificate snapin for local computer) and find your HTTPS certificate. In the context menu, under all tasks select the "manage private keys" option and grant access to everyone.

**Checklist for general troubleshooting:**

- Is the Setting WebApplicationPort still intact
- Are there any not http/https bindings in Dynamics 365
- Are there any not http/https bindings in the products website
- Is the DNS correctly resolving the products link?
- Has the ConnectionProfile been created with IFD as connection type

## 5 Windows 12 WIF Framework installation (WindowsIdentityFoundation)

Windows Identity Foundation is included with the operating system (Windows Server 2012 R2, Windows Server 2012 and Windows 8.1) as a Feature in Turn Windows features on or off.

If you didn't previous install WIF then you should follow these steps:

- Start by running the "Server Manager", if it is not already open, from either:
  - On the Windows taskbar, click the Server Manager button
  - On the Start screen, click Server Manager.
- Under "Manage" menu, select "Add Roles and Features" (or press "Add roles and features" under the Dashboard panel)
- On the Before You Begin screen, click "Next"
- On the Installation Type screen, select "Role-based or Feature-based Installation" and click "Next"
- On the Server Selection screen, select the appropriate server, leave the default options and click "Next"
- On the Server Roles screen, click "Next"
- On the Features screen, select "Windows Identity Foundation 3.5" and click "Next"

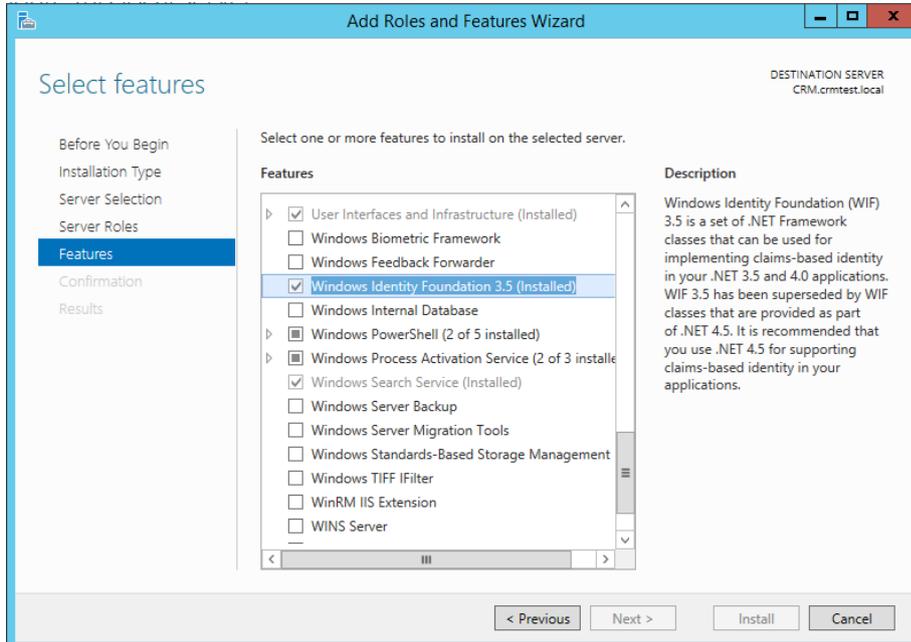


Figure 49: Windows features: WindowsIdentityFoundation 3.5

- On the Confirmation screen, select "Restart the destination server automatically if required" and click "Install":

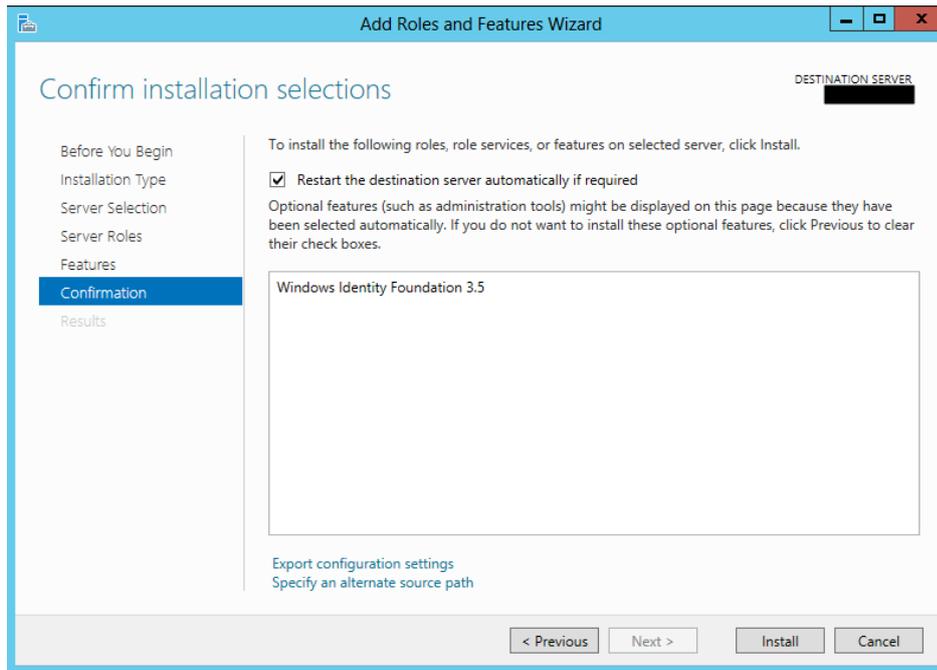


Figure 50: Confirm installation selection

- When the installation completes, the wizard reflects the installation status on the Results screen
- Click "Close" to exit the wizard.

## 6 DocumentsCorePack Templates

DocumentsCorePack templates are predefined Word-templates which have some DocumentsCorePack merge fields in it. You can define several templates for each Microsoft Dynamics 365 entity (e.g. account, contact...).

For example: You created an "Account reconnect"-template that should be used to send information to accounts. Once created and stored, every Microsoft Dynamics 365 user can generate "Account reconnect"-letters based on this template.

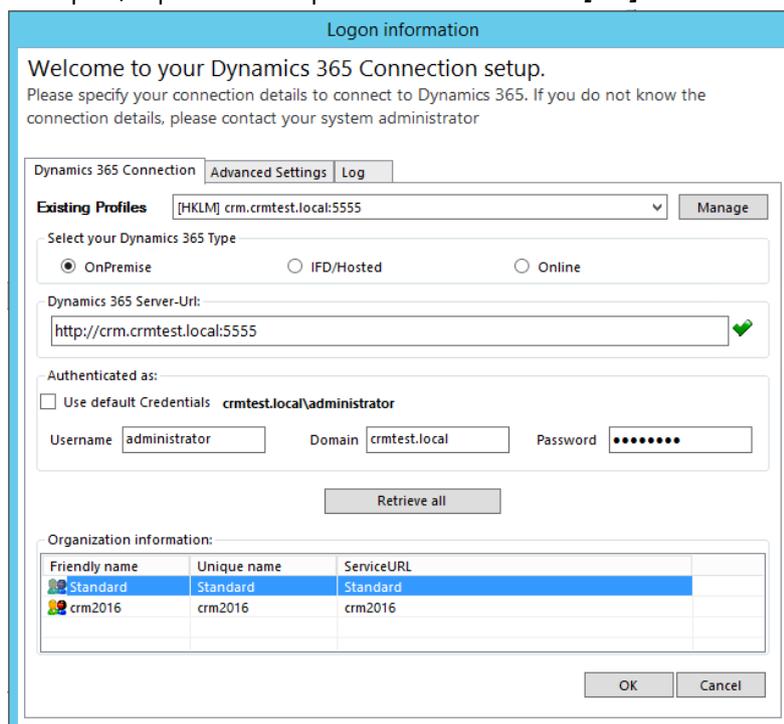
**NOTE:** Some basic templates like "Account Reconnect", "Gift Certificate" for contacts and "quote" – templates come with the installation of DocumentsCorePack.

### 6.1 How to create DocumentsCorePack templates?

Please read the corresponding [User Guide](#) (chapter 5.1 How to create DocumentsCorePack templates) to get more information about the creation of DocumentsCorePack templates.

### 6.2 Import/export existing DocumentsCorePack templates

Open your DocumentsCorePack Server Configuration and choose the organisation for which you want to import/export the Templates and click on the **[OK]**-button.



Logon information

Welcome to your Dynamics 365 Connection setup.  
Please specify your connection details to connect to Dynamics 365. If you do not know the connection details, please contact your system administrator

Dynamics 365 Connection | Advanced Settings | Log

Existing Profiles: [HKLM] crm.crmtest.local:5555 [Manage]

Select your Dynamics 365 Type

OnPremise  IFD/Hosted  Online

Dynamics 365 Server-Url: http://crm.crmtest.local:5555 ✓

Authenticated as:

Use default Credentials crmtest.local\administrator

Username: administrator Domain: crmtest.local Password: ●●●●●●

Retrieve all

Organization information:

| Friendly name | Unique name | ServiceURL |
|---------------|-------------|------------|
| Standard      | Standard    | Standard   |
| crm2016       | crm2016     | crm2016    |

OK Cancel

Figure 51: Logon information – open the organization to import/export templates

In the so opened Organization overview-window, select an organization to access to the Configurations and select "Client & Server Based generation settings" – highlighted in yellow in the figure below.

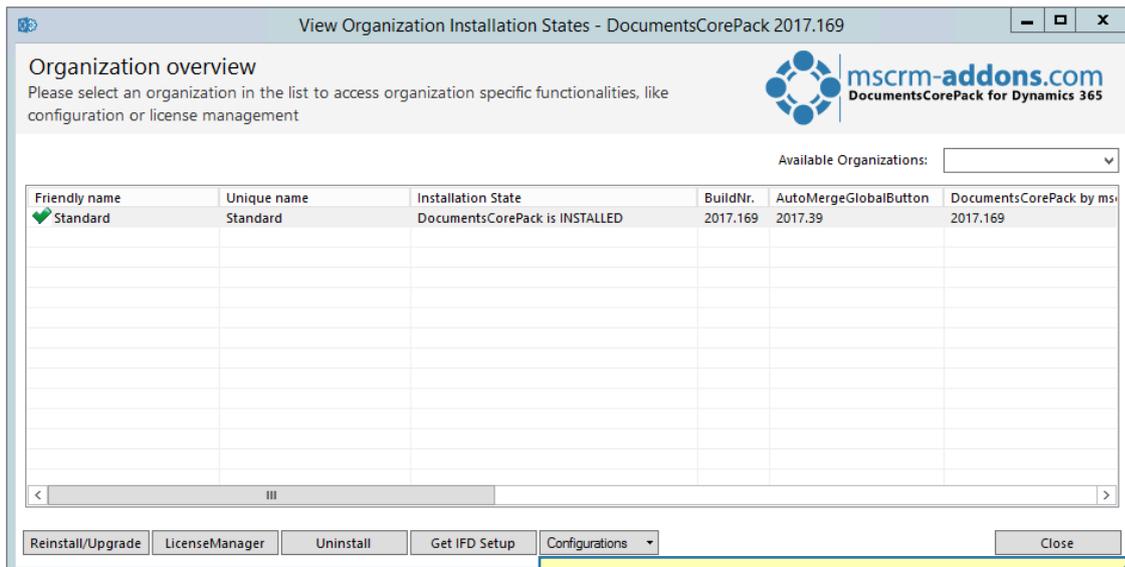


Figure 52: Client & Server Based generation settings

**Client & Server Based generation settings** Launch

Configure Client & Server Based document generation settings

Enable debugging (Caution! Slow)

---

**Service Configuration** Launch

Set up a service for Server Based Document Generation in Dynamics 365-Online and print jobs

This action will open the DocumentsCorePack Client Configuration. Here select the *General Settings* tab.

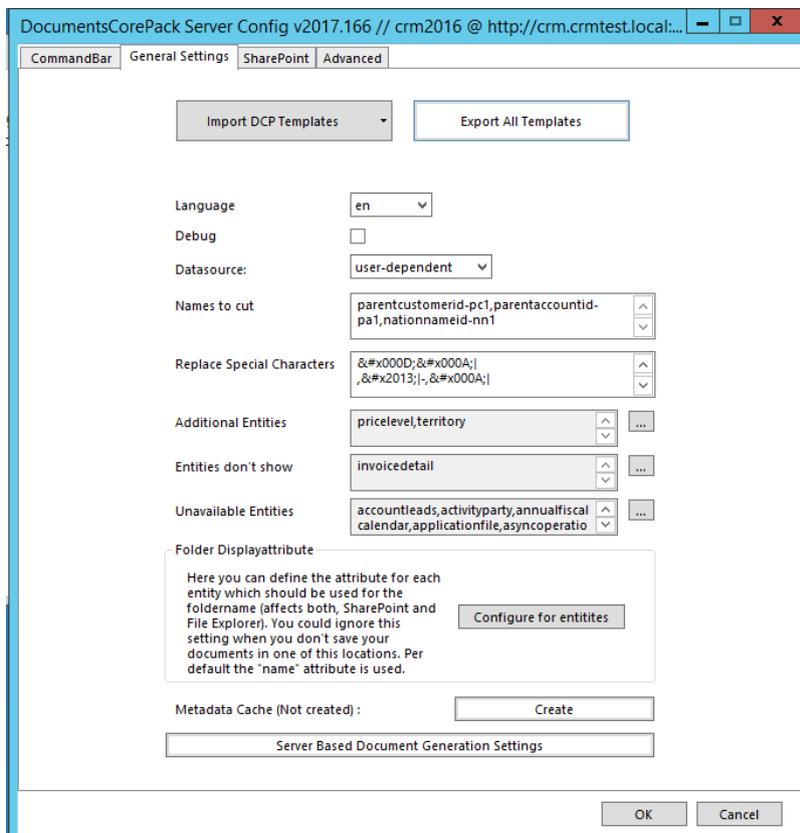


Figure 53: The General Settings-tab

Here you have the possibility to import and/or export templates. By clicking the **[Import DCP Templates]**-button or the **[Export All Templates]**-button the Template Import Manager opens. It allows you to either import, export or transfer your DocumentsCorePack templates.

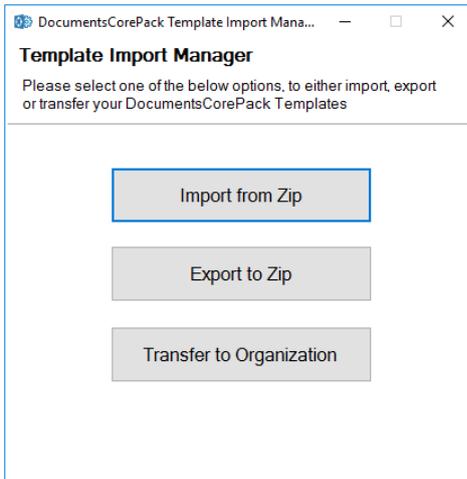


Figure 54: The Template Import Manager

For more information about how the Template Import Manager works, please have a look at the corresponding documentation – [DocumentsCorePack ServerBased User Guide](#) (chapter 5 DCP Template Import Manager).

Now the templates are imported/exported in MS Word and ready to use. Therefore go to the [www.mscrm-addons.com](http://www.mscrm-addons.com) – tab and click on “Open Template” (highlighted in yellow).

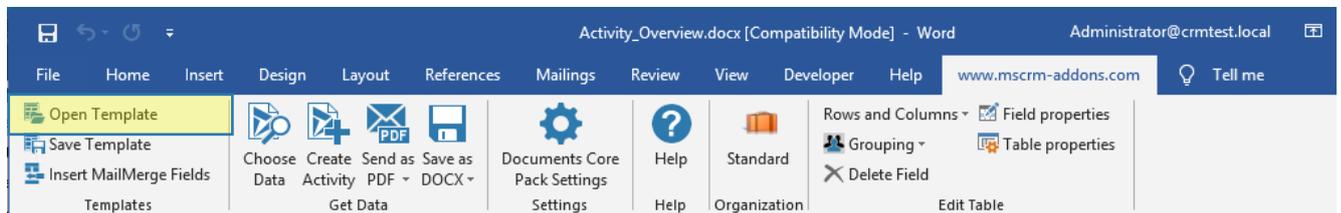


Figure 55: The [www.mscrm-addons.com](http://www.mscrm-addons.com) – tab: Open Template

## 7 Language Settings for DocumentsCorePack

The UI of DocumentsCorePack can be modified to any language. All UI display strings are stored in an XML File.

### 7.1 Language Settings on the Client

This chapter outlines how to modify the language settings on the Client.

#### 7.1.1 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 the DocumentsCorePack installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Client for Dynamics 365\Localization".

#### **Example:**

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

<Language setting> is the language code that DocumentsCorePack should use on the client. Each client can have its own language settings and files.

**NOTE:** Please note that these languages files can only be used if the set language is the same as the user language of your Dynamics 365 system.

#### 7.1.2 Modify the UI on the Client

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

2. Press START – RUN.
3. Type "regedit" and click OK.
4. Locate the registry key **HKEY\_LOCAL\_MACHINE\Software\PTM EDVSysteme\**
5. **DocumentsCorePackClient2018.**
6. Change the value of the "language" setting to another language.
7. 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 have to open the registry and to change the value of "language" setting to **nl**.

### 7.1.3 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.

## 7.2 Language Settings on the Server

This chapter outlines how to modify the language settings on the Server.

### 7.2.1 Location of the Language Settings on the Server

The UI of DocumentsCorePack Server can be modified to any language. All UI display strings are stored in an XML File.

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

The language file is located in the sub folder **localization** of DocumentsCorePack installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Server for Dynamics365\Localization".

#### **Example:**

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

**NOTE:** The language XML-files from the server and client component are different. If you want to translate DocumentsCorePack, you have to translate both files, the language file on the client and on the server.

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

### 7.2.2 How to translate a language file on the server

Have a look at [CHAPTER 7.1.3 HOW TO TRANSLATE A LANGUAGE FILE ON PAGE 49](#).

## 8 Per User Licensing-option

Open your Dynamics 365 and navigate to Settings and select Security as you can see highlighted in yellow below.

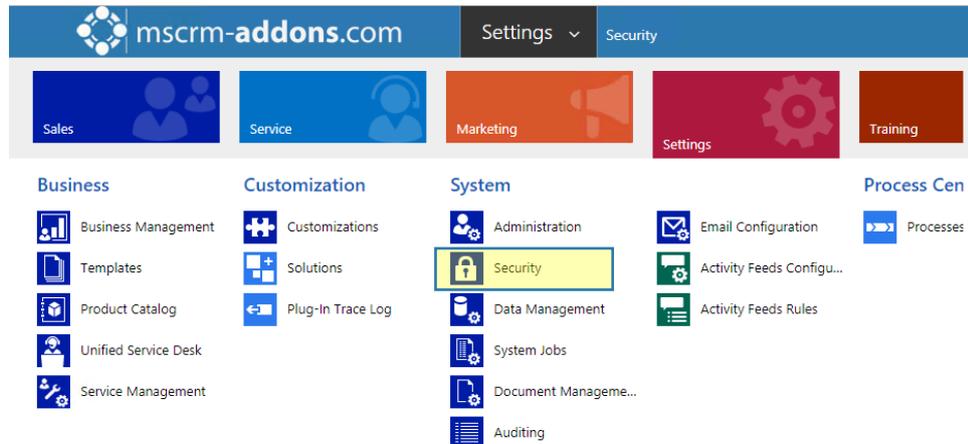


Figure 56: Dynamics 365 Settings – Security

In the *Security*-window you see the option “Users” where you are able to add, edit information about users and activate/deactivate.

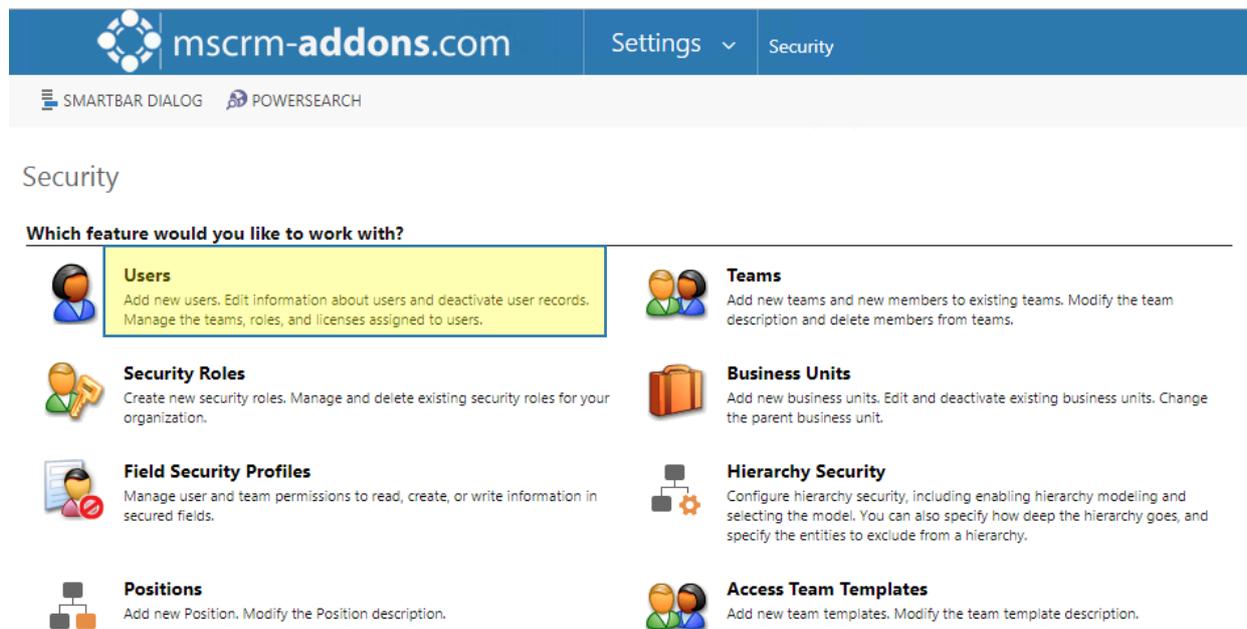
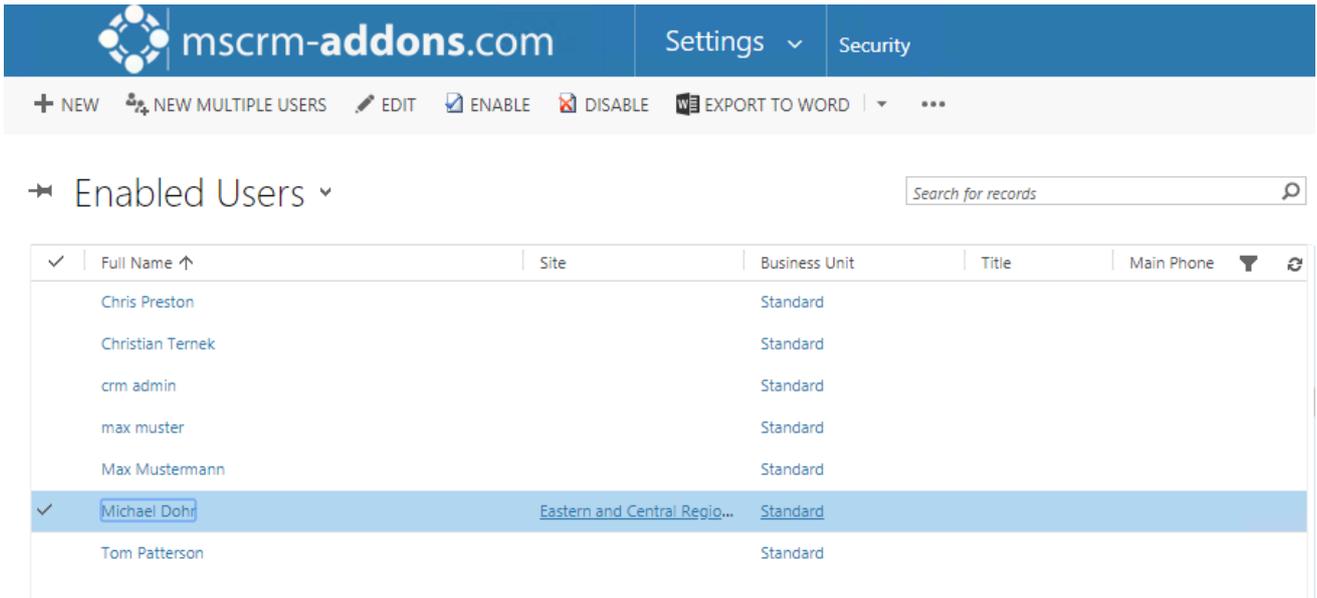


Figure 57: Security – Users



If you activate more users as you have licenses, the product will stop working for all users.

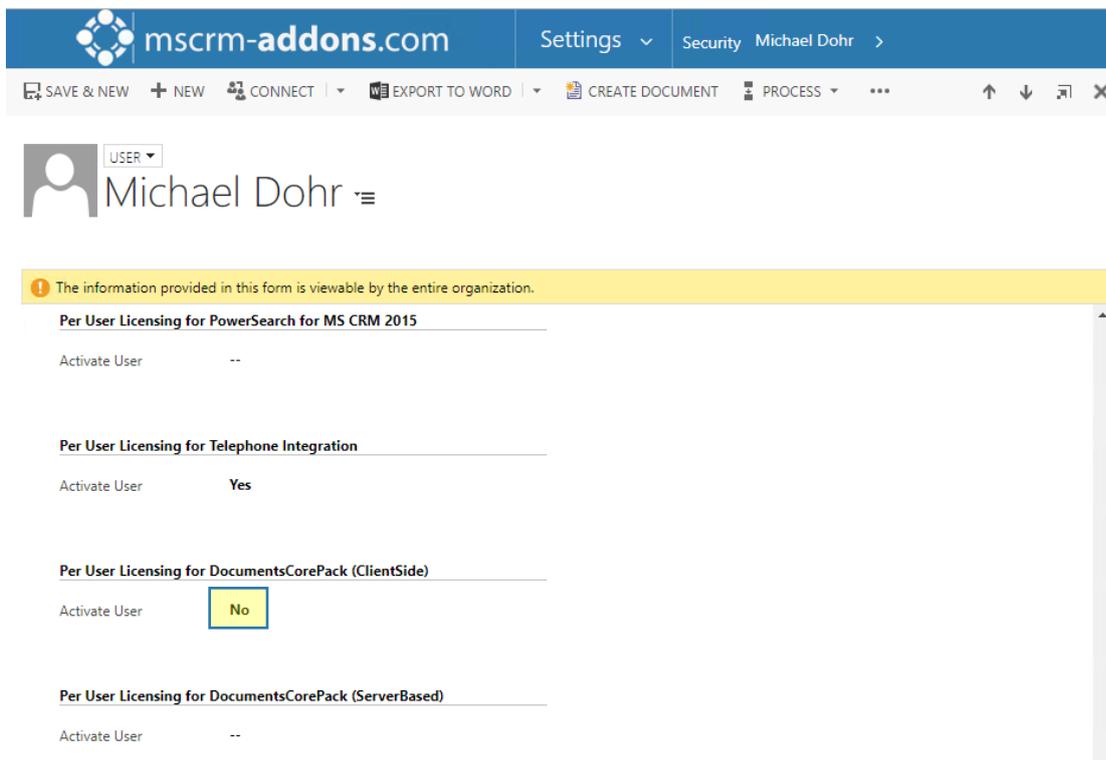


The screenshot shows the 'Enabled Users' section of the application. At the top, there is a navigation bar with the 'mscrm-addons.com' logo and 'Settings' and 'Security' menus. Below the navigation bar is a toolbar with icons for '+ NEW', 'NEW MULTIPLE USERS', 'EDIT', 'ENABLE', 'DISABLE', and 'EXPORT TO WORD'. The main content area is titled 'Enabled Users' and includes a search box labeled 'Search for records'. Below the search box is a table with the following columns: 'Full Name', 'Site', 'Business Unit', 'Title', and 'Main Phone'. The table contains several rows of user data, with the row for 'Michael Dohr' highlighted in blue. The 'Michael Dohr' row shows 'Eastern and Central Regio...' for the Site and 'Standard' for the Business Unit.

| Full Name        | Site                         | Business Unit | Title | Main Phone |
|------------------|------------------------------|---------------|-------|------------|
| Chris Preston    |                              | Standard      |       |            |
| Christian Ternek |                              | Standard      |       |            |
| crm admin        |                              | Standard      |       |            |
| max muster       |                              | Standard      |       |            |
| Max Mustermann   |                              | Standard      |       |            |
| Michael Dohr     | Eastern and Central Regio... | Standard      |       |            |
| Tom Patterson    |                              | Standard      |       |            |

Figure 58: Enabled Users

Double-click on the user you want to activate/deactivate and scroll down. By setting this option to “No” for Per User Licensing for DocumentsCorePack (ClientSide) (highlighted in yellow), the license will be disabled for this user.



The screenshot shows the user settings page for 'Michael Dohr'. At the top, there is a navigation bar with the 'mscrm-addons.com' logo and 'Settings' and 'Security' menus. Below the navigation bar is a toolbar with icons for 'SAVE & NEW', '+ NEW', 'CONNECT', 'EXPORT TO WORD', 'CREATE DOCUMENT', and 'PROCESS'. The main content area is titled 'Michael Dohr' and includes a dropdown menu for 'USER'. Below the user name is a yellow warning banner that reads: 'The information provided in this form is viewable by the entire organization.' Below the warning banner are four sections for licensing options, each with an 'Activate User' label and a radio button. The 'Per User Licensing for DocumentsCorePack (ClientSide)' section has a yellow box around the 'No' radio button, indicating it is selected. The other sections are 'Per User Licensing for PowerSearch for MS CRM 2015', 'Per User Licensing for Telephone Integration', and 'Per User Licensing for DocumentsCorePack (ServerBased)'. The 'Per User Licensing for PowerSearch for MS CRM 2015' and 'Per User Licensing for DocumentsCorePack (ServerBased)' sections have their 'Activate User' radio buttons set to 'No'.

Figure 59: Deactivate User

The disabled User license also disables the “Create Document” -button as shown in the following screenshot.

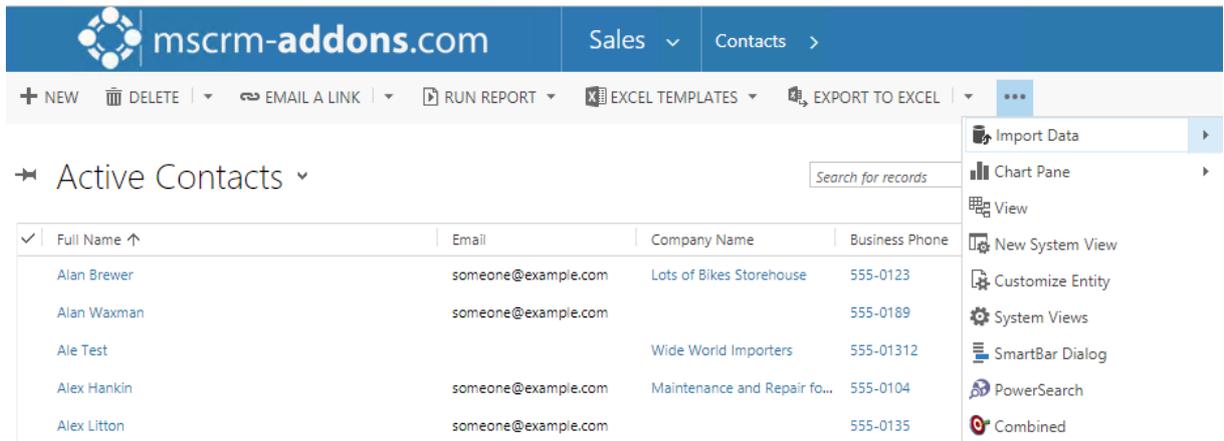


Figure 60: Disabled User – disabled “Create Document”-button

## 9 Important information

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

### **Example:**

You have an existing document with two merge fields:

parentaccountid\_name and parentaccountid\_fax

Now you change the setting to shorten parentaccountid to pc1. NEW Templates will be filled correctly! (Insert Mail Merge Fields inserts the correct short name into your template.)

All OLD templates which use merge fields and which include parentaccountid will not work anymore! So, you have to edit them! (maybe by using the Replace...-function of Word) Sometimes it will be the better way to replace full merge fields. So instead of changing just a part of a merge field let DCP replace the whole one.

### **For example:**

From "customerid\_contact\_parentcustomerid\_address1\_fax" to

"cust\_cont\_par\_adr1\_fax"; Old templates won't be affected, but you have to add every field to the settings.

## 10 Uninstall DocumentsCorePack Server Component

In order to uninstall DocumentsCorePack Server for Microsoft Dynamics 365 select “Programs and Features” in the Control Panel.

Search for the DocumentsCorePack Server for Dynamics 365 in “Uninstall or change a program” and click on “Uninstall” (highlighted in yellow).

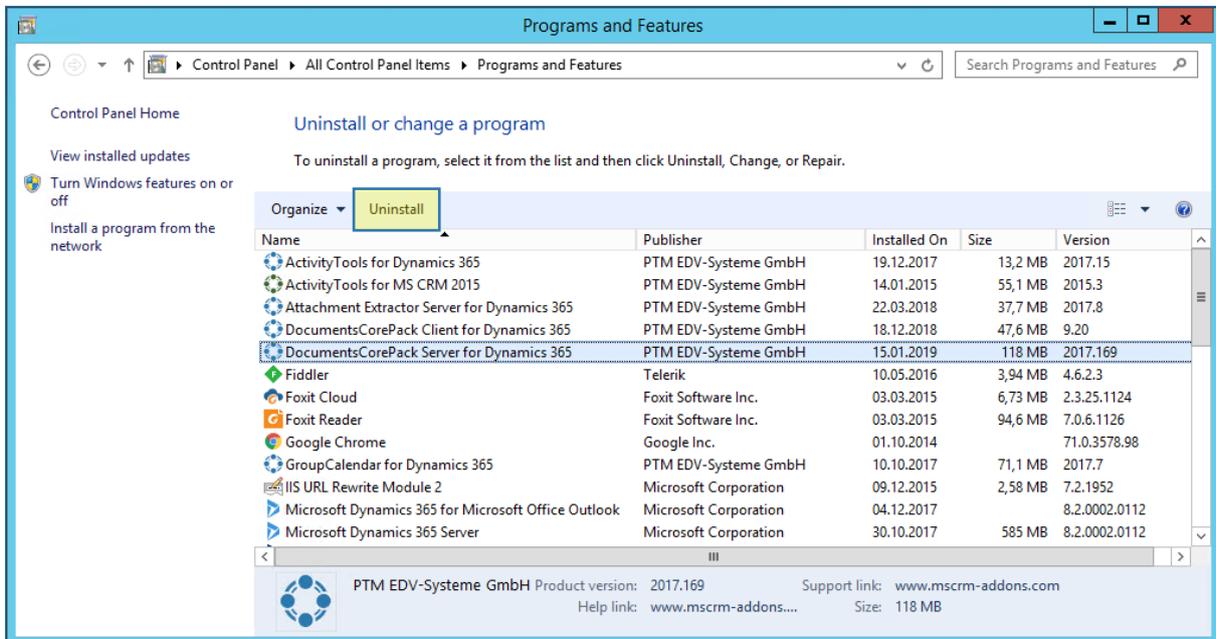


Figure 61: Uninstall DCP Server for Dynamics 365

Following window appears:

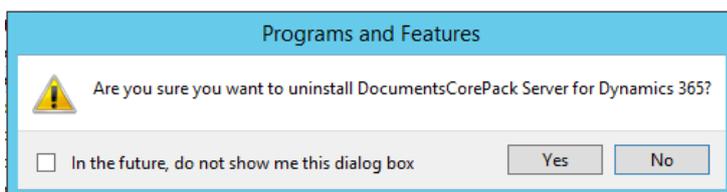


Figure 62: Uninstall window DCP Server for Dynamics 365

Click on **[Yes]** to confirm Uninstall.

Click on **[No]** to stop the process.

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## Contact

For further technical questions, please visit our blog <http://blogs.mscrm-addons.com> or contact [support@mscrm-addons.com](mailto:support@mscrm-addons.com).

For sales and licensing questions please contact [office@mscrm-addons.com](mailto:office@mscrm-addons.com) or the corresponding contact information below.



### Headquarter – Europe

PTM EDV-Systeme GmbH  
Bahnhofgürtel 59  
A-8020 Graz  
Austria

Tel Austria +43 316 680-880-0  
Fax +43 316 680-880-25

**Support:**

7AM - 8PM GMT+1 (Monday-Friday)

**Sales:**

+43 316 680 880 14

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

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

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



### Headquarter – US

mscrm-addons.com Corp  
1860 North Rock Springs Rd  
Atlanta, GA 30324  
United States

Tel US +1 404 720 6066

**Support:**

9AM - 6PM EST (Monday-Friday)

**Sales:**

+1 404 720 6046

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

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