DocumentsCorePack ServerBased User Guide for Microsoft CRM 2015/2016 and Dynamics 365

August 2020

Server Based user guide
(How to work with DocumentsCorePack ServerBased for MS CRM 2015/2016 and MS Dynamics 365)

Content

Preamble

This guide gives detailed explanations of all functionalities provided by DocumentsCorePack ServerBased Document Generation and Processing for Microsoft CRM 2015/2016 (former AutoMerge) and Microsoft Dynamics 365.
It aims to describe the main settings, including step-by-step descriptions about how to use all the benefits provided by our solution.

This guide applies to version 7.110 (8.110) or higher.

Please read this document carefully and follow the steps as described in order to achieve the best results.

Should you have any further questions, please do not hesitate to contact us.

Target Audience

This guide is intended for users processing documents with DocumentsCorePack on a server who have the following minimum skills:

- Basic Knowledge of Microsoft Office Word
- Basic Microsoft Dynamics CRM Knowledge

Purpose of the DocumentsCorePack ServerBased?

DocumentsCorePack ServerBased runs either directly in your Dynamics 365 or as a service in the cloud or server and is accessible for all users after a central installation.

DocumentsCorePack ServerBased (DCP SB) provides the possibility to create and print documents automatically triggered from a workflow or dialog anywhere you want to, as long as you have access to your Microsoft Dynamics 365 server. After the document is created, it can be attached to emails and letters as well. A Microsoft Word installation is not required!

The main features are

- Creating Word documents merged with data from Microsoft Dynamics 365

- Creating SharePoint folders and subfolders.
- Attaching documents to emails, letters and entities
- Printing created documents
- Deleting temporary documents
- Sending eMails
- Concatenating different documents in a single one

1 Available demo templates

DocumentsCorePack already has a set of templates to allow you to quickly start.

Name	Function/Usage	Minimum Data Input
Account reconnect	Simple account template just with fields from account entity.	The sample data
Account overview	Simple account template with tables which contain data from the given entities.	The sample data and data from each additional entity
Contemporary letter		
List of accounts related to this account	Shows all accounts related to the selected account.	The selected account should contain other related accounts.
List of contacts related to this account	Shows all contacts related to the selected account.	The selected account should contain other related contacts.
Account QR Code	How to use the QR-Code-Field with the Account entity	The sample data
Activity Overview	Simple activity template with tables which contain data from the given extra entities.	The sample data and data from each additional entity.
Contact Reconnect – Gift Certificate	Simple Activity Template just with fields from the Activity entity.	The sample data
List of Accounts related to this contact.	Shows all accounts from the selected contact.	The selected contact should contain other related contacts.
Quote Base	Simple Quote Template just with fields from the quote entity.	You should have at least one quote.
Quote with Grouping Base	Simple Quote Template.	You should at least have one quote, some products and some prices.
Quote QR Template	How to use the QR-Code-Field with the Quote entity.	You should at least have one quote, some products and some prices.
Invoice Base	Simple invoice template just with fields from the invoice entity.	The sample data
Invoice with grouping base	Simple invoice template.	The sample data.
Newsletter to all accounts of this marketing list	Generates a document for each account in a marketing list.	You should have a marketing list with at least one account.
Opportunity Base	A simple sample template for an opportunity letter.	The sample data.

2 Main functionalities of DocumentsCorePack ServerBased

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

Main Features:

- **CreateDocuments**
  Enables the creation of Word-documents with data from Microsoft Dynamics 365. It is capable to resolve any relation and works with custom entities, as well as with standard Dynamics 365 entities. This means, that DocumentsCorePack ServerBased provides the opportunity to automatically create e.g. quotes, invoices, etc. that include specific data from related records like "other contacts", accounts, products, etc.

- **CreateSharePointFolder**
  Creates SharePoint locations, folders and subfolders automatically within Microsoft Dynamics 365. This can be done via AutoMergeWorkingItem which can be triggered automatically when creating a new workflow in a process.

- **ConcatenateDocuments**
  Select this option to concatenate different documents in one single document.

- **Attach to Email/Letter/Entity**
  With this functionality the generated document can be attached to emails, letters and entities.

- **PrintOut**
  DocumentsCorePack ServerBased also provides the possibility to print out the created document.

- **DeleteTempDocument**
  Delete an existing document from the "MSCRM-ADDONS.com User/Temp Settings" entity.

- **SendEmail**
  Gives you the ability to send an existing email.

Further information on how to create workflows in DocumentsCorePack ServerBased (on premise) can be found in chapter 3.4.2 DocumentsCorePack workflow activities (.

Further information on how to create workflows in DocumentsCorePack ServerBased (Online) can be found in chapter 3.5.1 How to create a workflow.

3 How to use DocumentsCorePack ServerBased

There is no client software necessary to use the DocumentsCorePack functionality. It can be accessed directly within MS Dynamics CRM from workflows and dialogs. The following descriptions show where the DocumentsCorePack ServerBased functionality can be found and which requests are available.

There are two possibilities to set up DocumentsCorePack ServerBased (On-Premise or CRM Online). While DCP ServerBased On-Premise works as a Plugin in CRM, DCP ServerBased for CRM Online needs a service (Please find a brief description in our DCP ServerBased and Client INSTALLATION GUIDE FOR MICROSOFT DYNAMICS CRM 2015/2016 AND MS DYNAMICS 365.

The access to workflows works similarly for both versions. For more information, please have a look at CHAPTER 3.1 HOW TO OPEN THE DOCUMENTSCOREPACK DIALOG ON PAGE 10.

The DocumentsCorePack Dialog is an easy accessible tool to create and process documents.

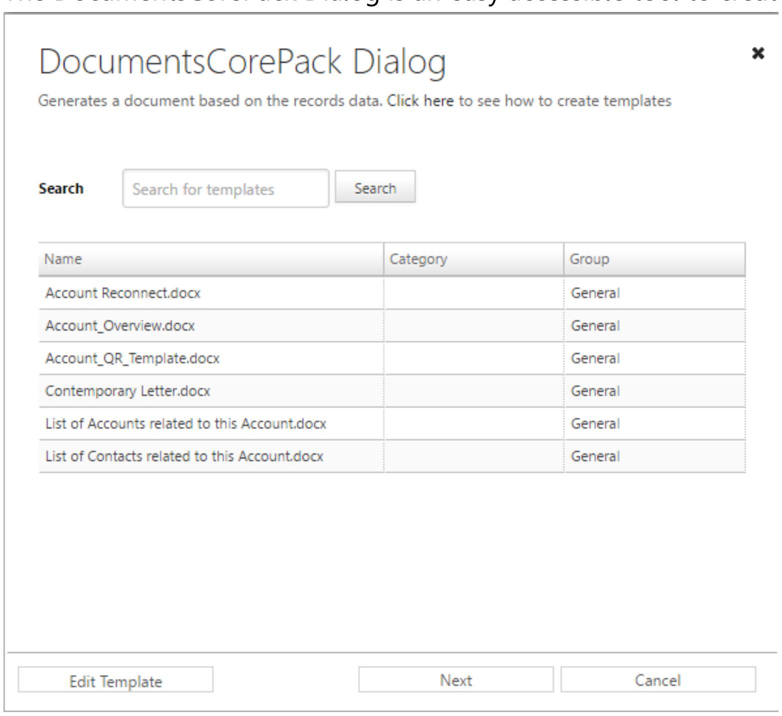


Figure 1: DocumentsCorePack Dialog overview

3.1 How to open the DocumentsCorePack Dialog

Per default, the create document button is available on each entity. If you do not have any templates created by yourself, you are able to use any of the demo templates that are delivered with the default installation. A list of all available demo template can be found in CHAPTER 1 AVAILABLE DEMO TEMPLATES ON PAGE 9.

There are three different ways to open the DocumentsCorePack Dialog:

- when using single merge
  (SEE CHAPTER 3.1.1 HOW TO OPEN THE DOCUMENTSCOREPACK DIALOG USING SINGLE MERGE, PAGE 11)
- when using bulk merge
  (SEE CHAPTER 3.1.2 HOW TO OPEN THE DOCUMENTSCOREPACK DIALOG USING BULK MERGE, PAGE 12)

3.1.1 How to open the DocumentsCorePack dialog using single merge

To open the dialog, simply open a random account. Then, click on the ***[Create Document]***-button within the CRM Command bar.

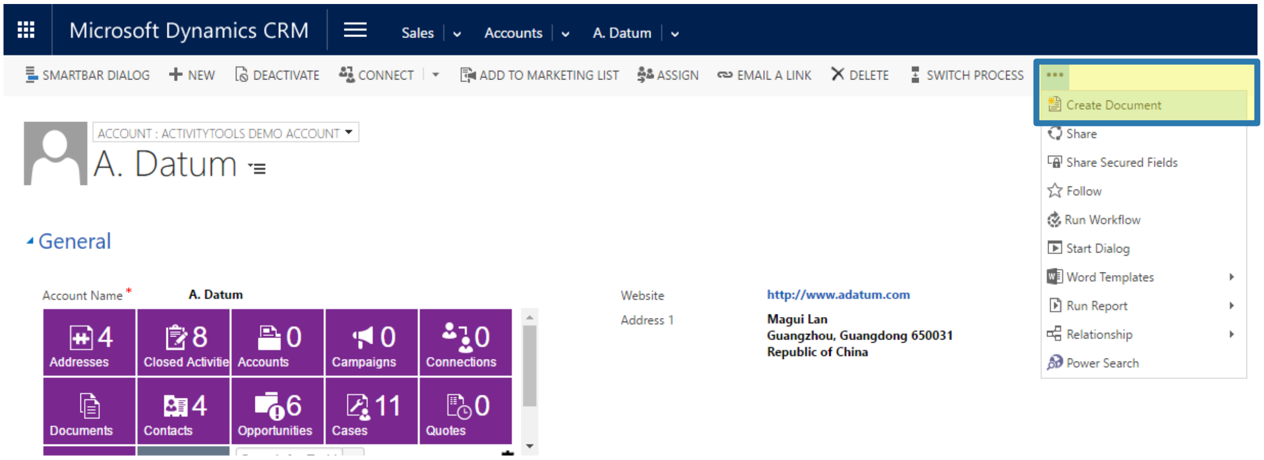


Figure 2: How to open DocumentsCorePack dialog using MS CRM Command bar

That's it! DocumentsCorePack dialog opens after a quick click!

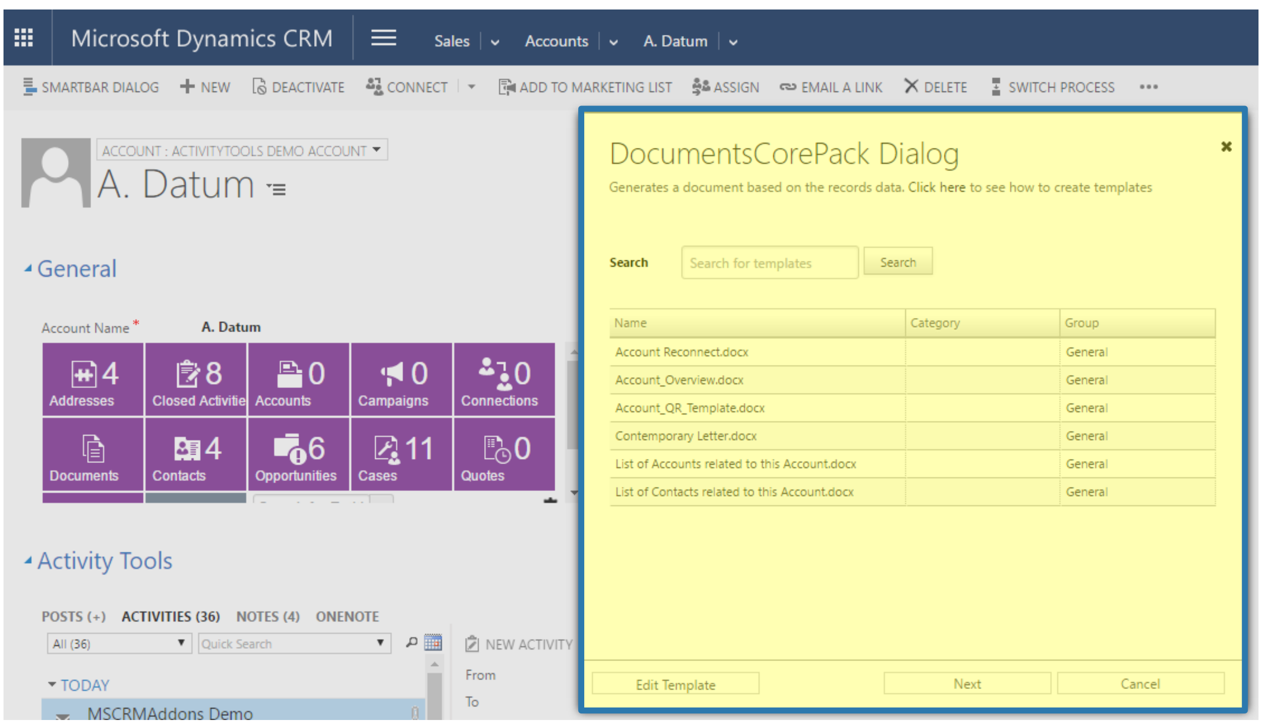


Figure 3: How to open DocumentsCorePack dialog – single merge example

For further information on how to merge a document with information from a single source, please have a look at our 'How-to'-section and see CHAPTER 7.1 HOW TO MERGE A DOCUMENT (SINGLE MERGE).

3.1.2 How to open the DocumentsCorePack dialog using bulk merge

If you want to merge data from more than one source, you can do so using the entity grid, which provides you with a list of certain entities, e.g. account.

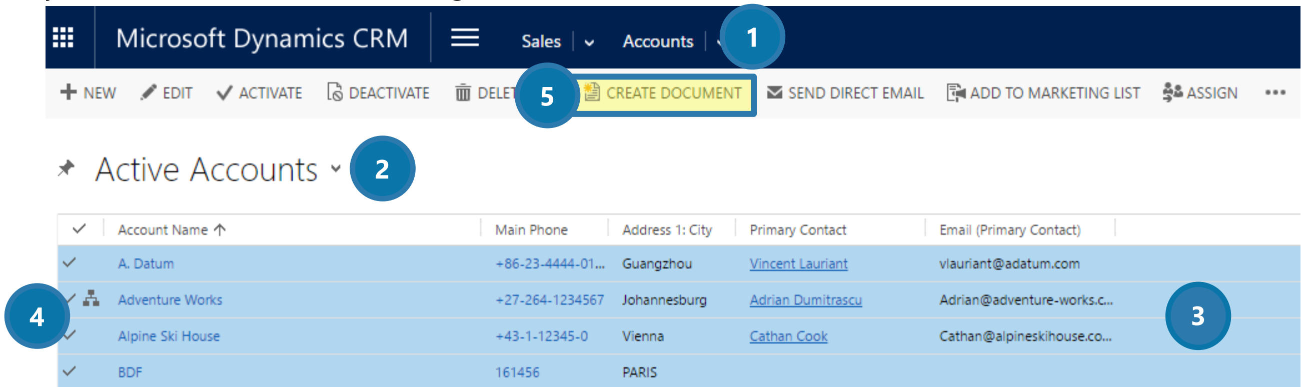


Figure 4: How to open DocumentsCorePack dialog using more than one source entity

To do so, simply select your starting entity (e.g. Account) 1.
Select, which view (e.g. active accounts) 2 you would like to apply to the results in the below grid 3.
Now simply check the records you would like to add to your merge process. 4
Finally, click on the ***[Create document]***-button in the command bar. 5

When using bulk merge, the DocumentsCorePack dialog looks a little different than when you open it for a single merge purpose. This is, because you have more than one data source. For further information on how to merge a document with information from many sources, please have a look at our 'How-to'-section and see CHAPTER 7.2 HOW TO MERGE A DOCUMENT (BULK MERGE) ON PAGE 70.

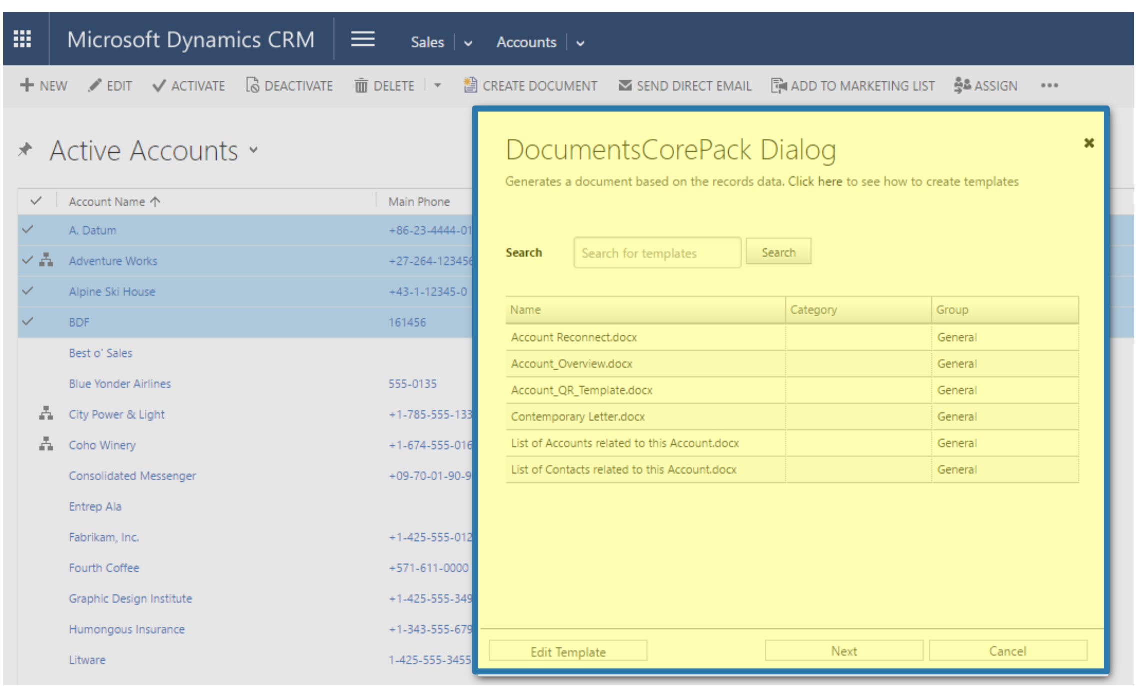


Figure 5: How to open DocumentsCorePack dialog – bulk merge example

3.2 DocumentsCorePack Dialog options

The DocumentsCorePack Dialog contains a set of options. The options vary and change depending on the selections you perform.

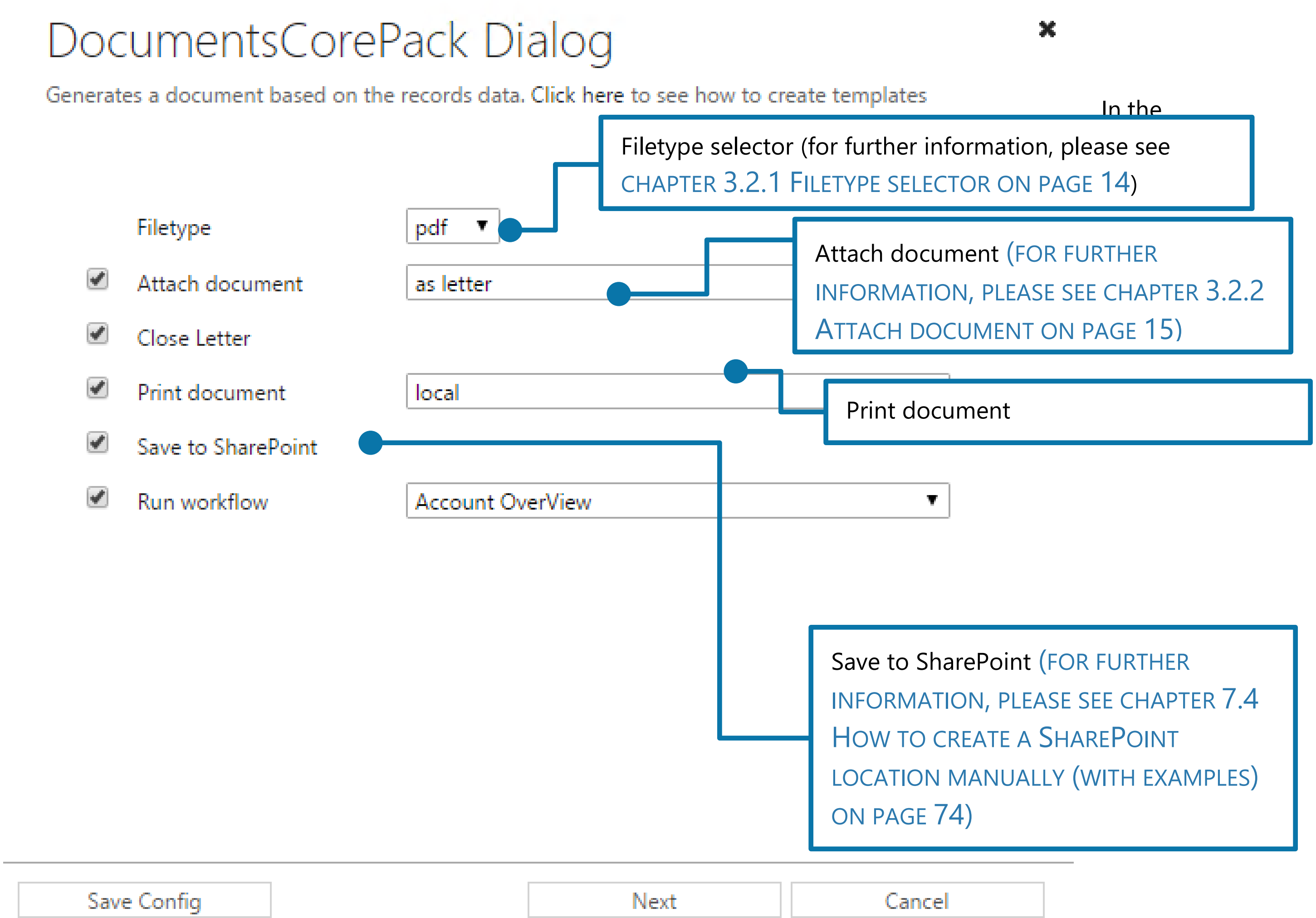


Figure 6: DocumentsCorePack dialog overview

In the course of the following chapters, you will be provided with further information on the DocumentsCorePack dialog.

3.2.1 Filetype selector

The filetype selector enables you to select your preferred file type.

To do so, simply click on the drop-down arrow and choose one of the supported file types:
.docx, .pdf, .doc, .xps, .text, .html, .png, .jpeg, .bmp, .epub.

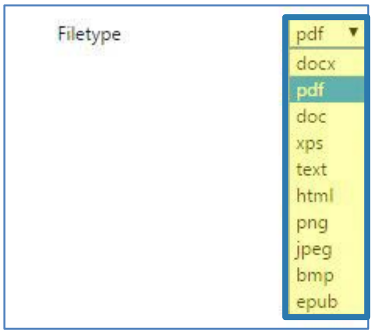


Figure 7: Filetype selector

The only exception is 'Attach as e-Mail content'. In that case, the file type is already set as .html and cannot be changed.

3.2.2 Attach document

This drop-down menu provides you with a few options on how to attach your document. You can select between

Attach as note
Attach as email attachment
Attach as email content
Attach as DocuSign eMail

Attach as DocuSign eMail
Attach as AssureSign eMail

Simply click on the option how you would like to attach your document and you will be forwarded automatically.

Please have a look at our eSignature User Guide in order to get more information about the Attach as DocuSign/AssureSign eMail attachment.

ATTACH AS NOTE

This option enables you to attach your document as a note in the file type that has been selected previously.

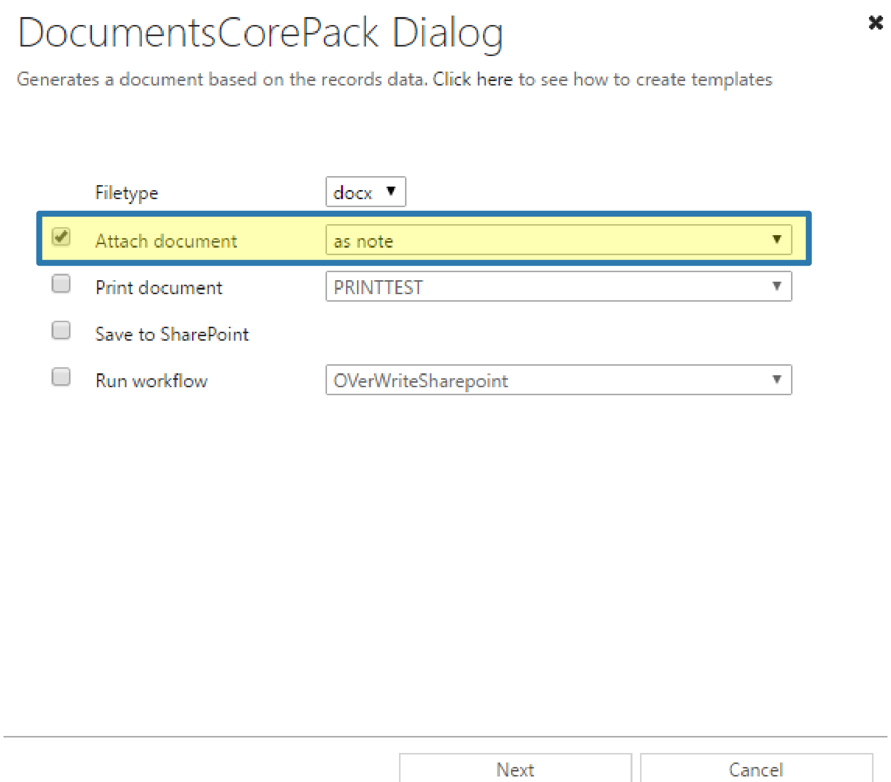


Figure 8: DocumentsCorePack Dialog: Attach as note

You can decide whether you want to print the note, save it to SharePoint or to run a workflow after the note is attached. In our example, one possible workflow would be *Overwrite SharePoint*.

Attach as email attachment

With this option the created document will be attached to the email in the file type that has been selected previously.

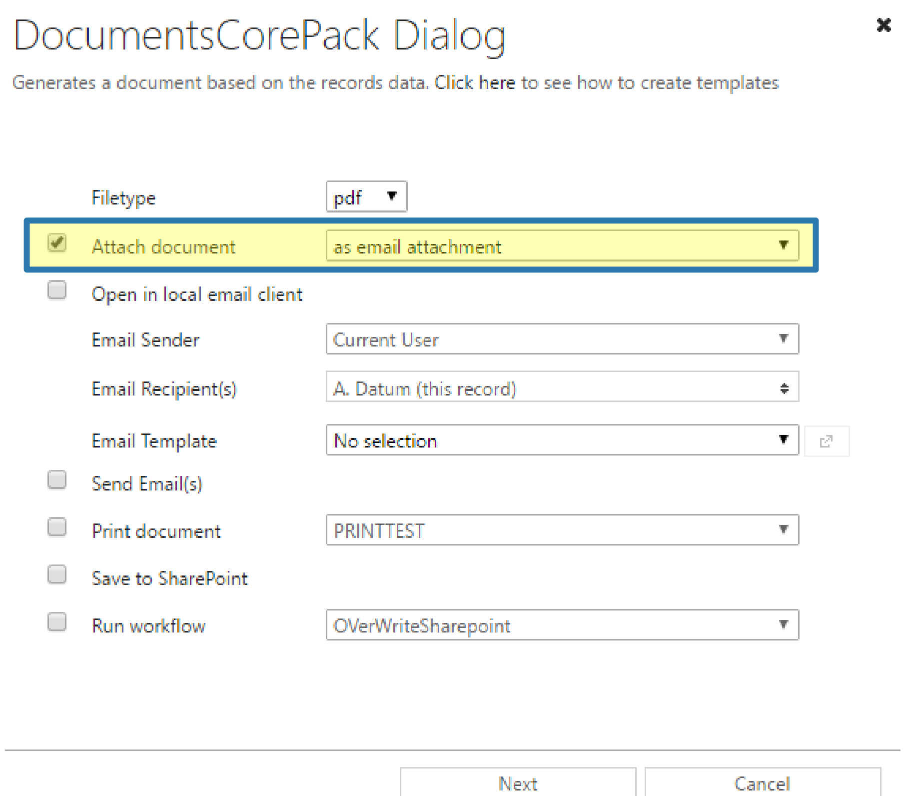


Figure 9: DocumentsCorePack Dialog: Attach as email attachment

You can decide whether you want to open the attachment in the local email client and if you would like to use an email template ①. Furthermore, this option allows you to define which recipient(s) you want the email to be sent to ②.

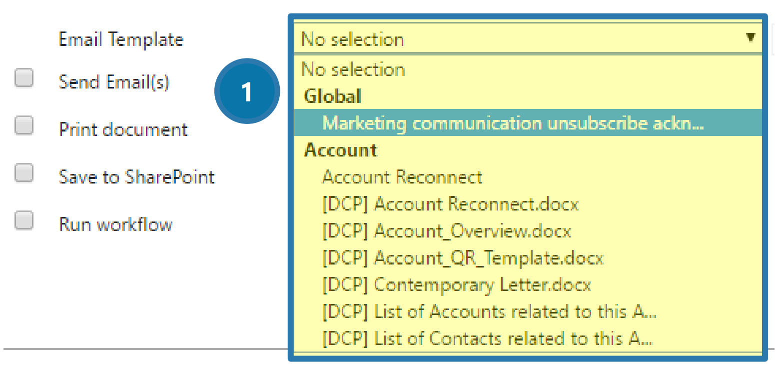


Figure 10: DocumentsCorePack Dialog: Set email template

The *Email Recipient(s) fields drop-down menu* allows you to check the records you would like the email to be sent to. If you uncheck a record, it will not be used as recipient.

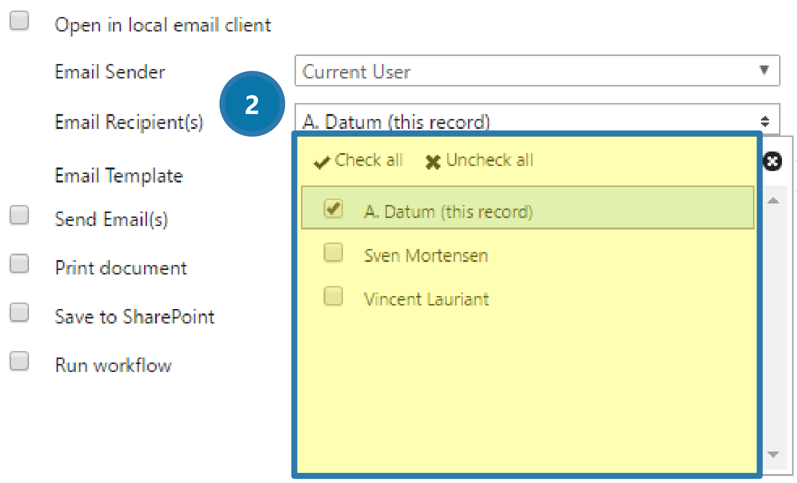


Figure 11: DocumentsCorePack Dialog: Set email recipient(s)

You can set various recipients of the differently related entites (e.g. account, or primary contact…), but only one sender!

After setting the email options, you can decide whether you want to send the email and/or print the document. Furthermore, you can save the document to SharePoint or run a workflow after the document is attached to an email.

ATTACH AS EMAIL CONTENT

Basically, this option provides you with the same possibilities as ATTACH AS EMAIL ATTACHMENT
The only difference is that the file type is automatically set as *html* and cannot be changed.

Attach as letter

This option provides you with the possibility to attach a document as a letter.

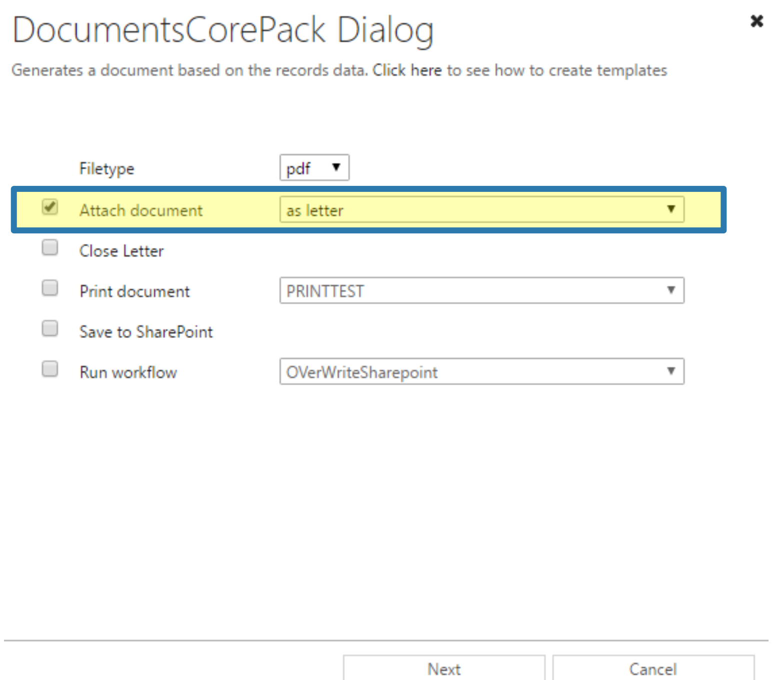


Figure 12: DocumentsCorePack Dialog: Attach as letter

Attach as letter enables you to close the letter, print the document, save it to SharePoint or to run a special workflow.

3.3 Create a Command (Requires the CRM Administrator privilege)

Depending on the type of the field type that you have added in the document you can call the properties windows.

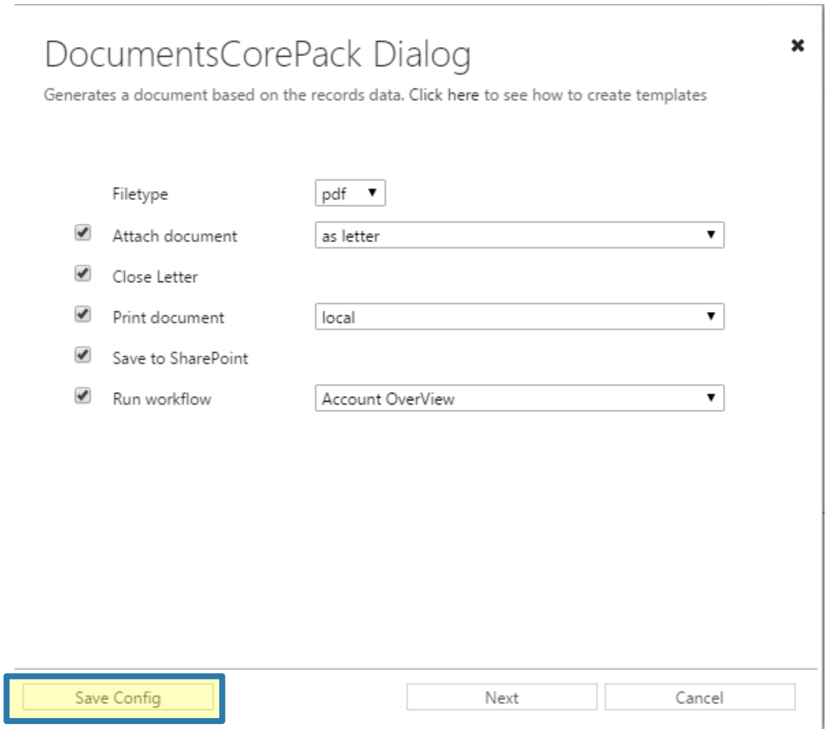


Figure 13: [Save Config]-button

In the left lower corner of the dialog, administrators usually find the ***[Save Config]***-button. It is usually hidden from regular Dynamics 365 users. Using this button, administrators can save certain frequently used settings under one button. This button is then provided to Dynamics 365-users, who can proceed their work with one click (instead of picking frequently used terms again and again).

Please find some further information on the ***[Save Config]***-button in the One-click-actions documentation ON OUR WEBSITE.

3.3.1 The Save Configuration Dialog

This dialog enables you to create one-click actions for future Microsoft Dynamics 365 users.

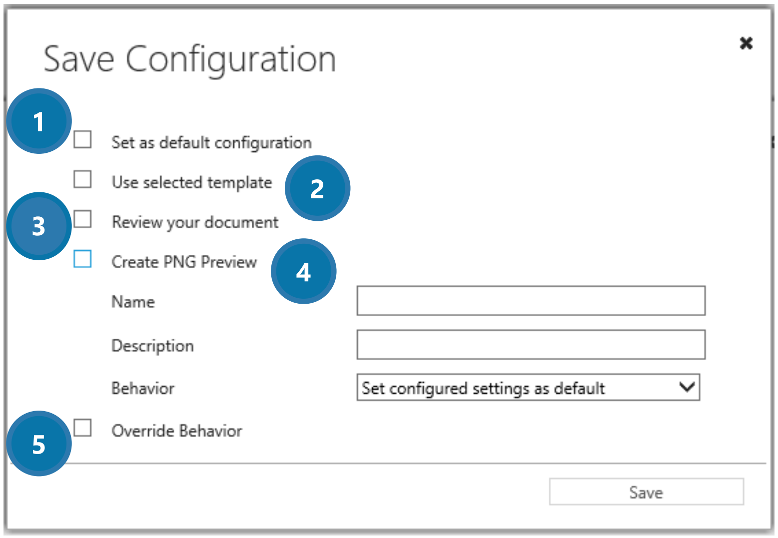


Figure 14: Save Configuration dialog

❶ SET AS DEFAULT CONFIGURATION

❷ USE SELECTED TEMPLATE

❸ REVIEW YOUR DOCUMENT

❹ CREATE PNG PREVIEW

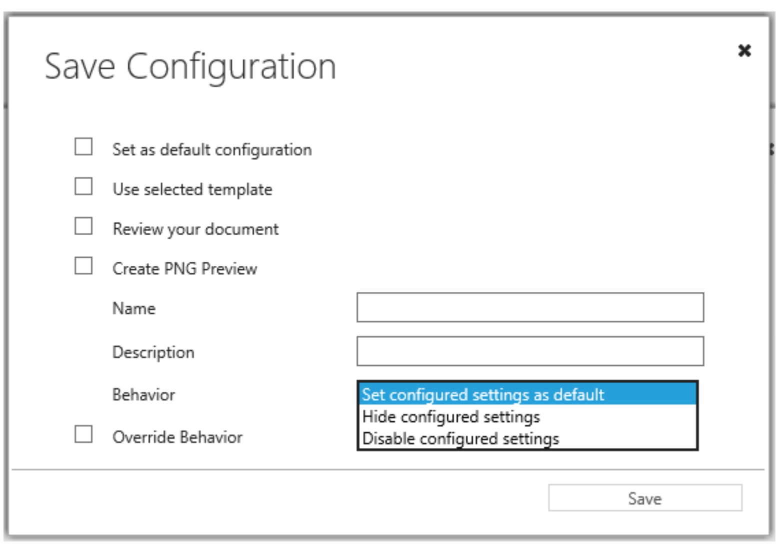


Figure 15: Save Configuration dialog – Create PNG Preview

❺ Override Behavior

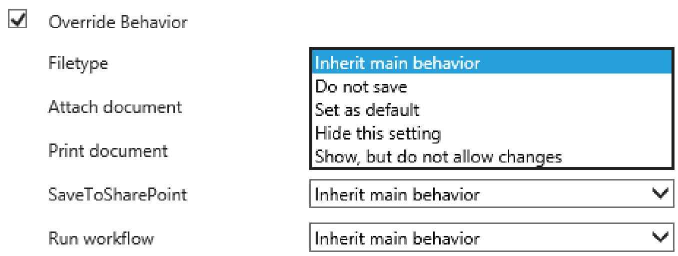


Figure 16: Save Configuration dialog – Override Behavior

3.4 Creating workflows in an OnPremise environment

In this step by step instruction, you will learn how the DocumentsCorePack ServerBased functionality can be used when starting from a workflow.

3.4.1 How to create a workflow

Follow the next steps in order to create a new workflow in DocumentsCorePack OnPremise:

STEP 1: HOW TO ACCESS THE SETTINGS PROCESSES

To do so, open the *Settings* Drop-Down menu within Dynamics 365, navigate to *Processes* and click on the button in order to open the section.

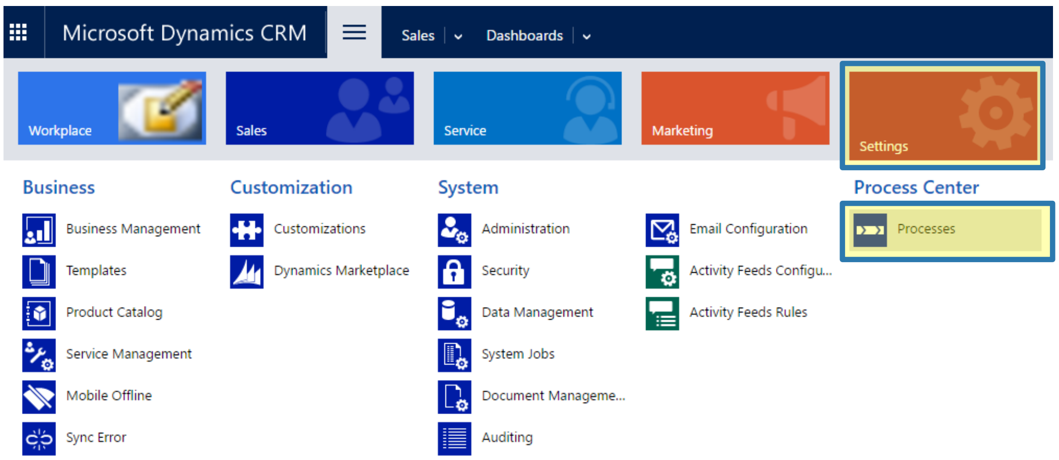


Figure 17: Enter Settings>Processes

STEP 2: CREATE A NEW PROCESS

To do so, click on the ***[New]***-button. This action opens the *Create process* dialog, which enables you to define a new process.

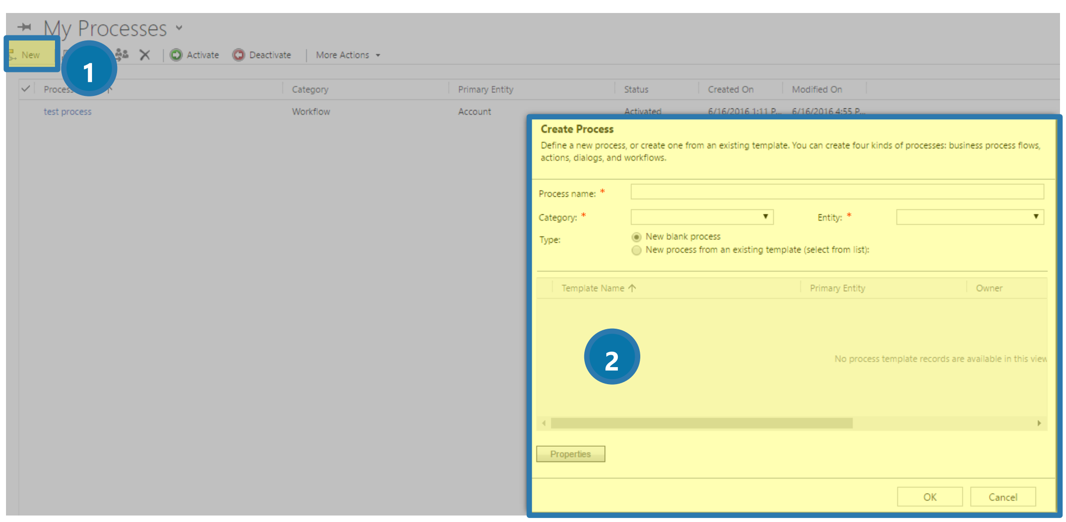


Figure 18: Create a new process

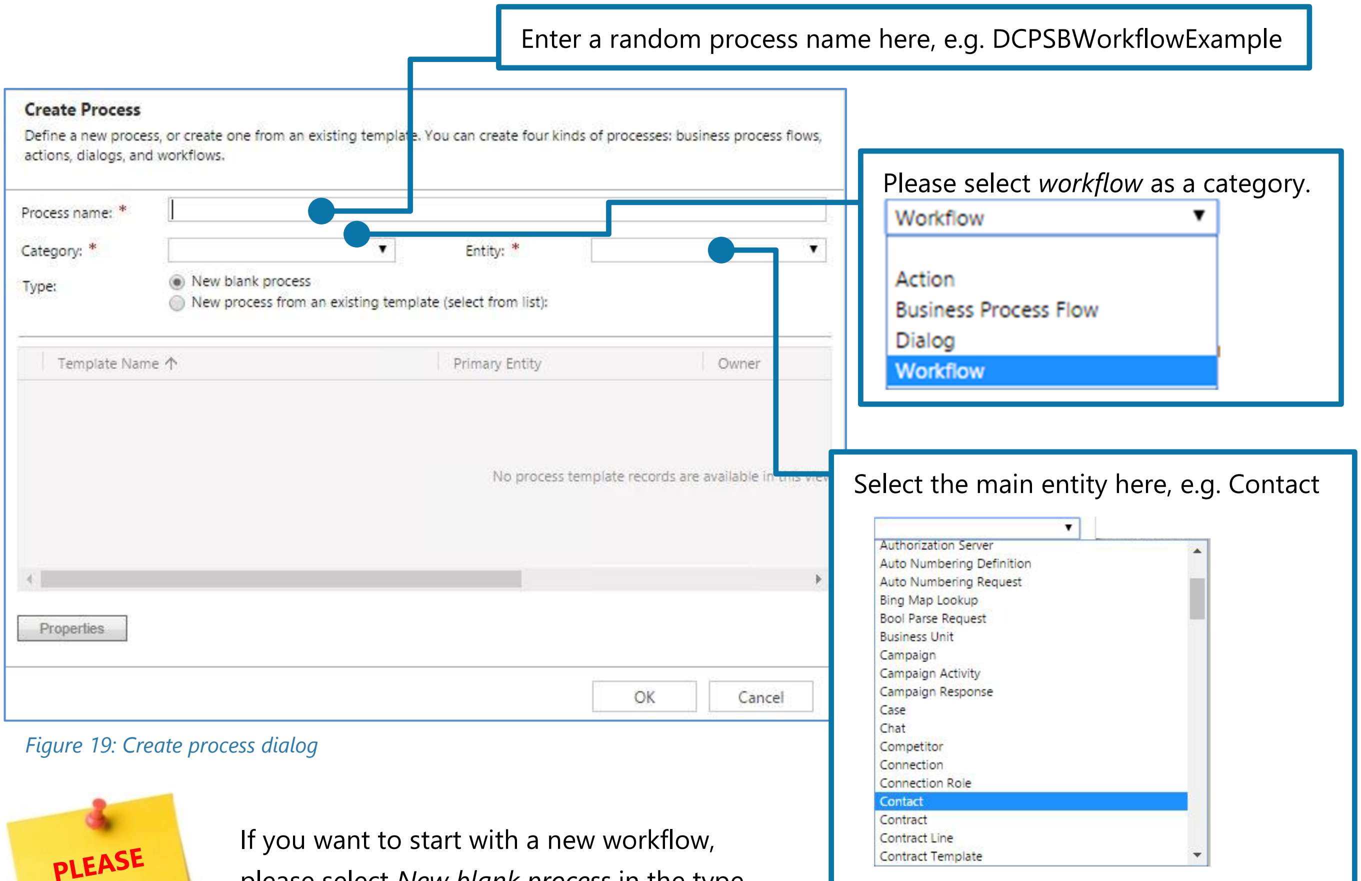


Figure 19: Create process dialog

If you want to start with a new workflow, please select *New blank process* in the type section. If not, select *New process form an existing template (select from list)* and select the corresponding template from the list.

Once prepared, the dialog will look more or less like the below figure. "More or less" because the final look depends on the information you add to the dialog. Please click on the ***[OK]-button*** in the right lower corner in order to proceed.

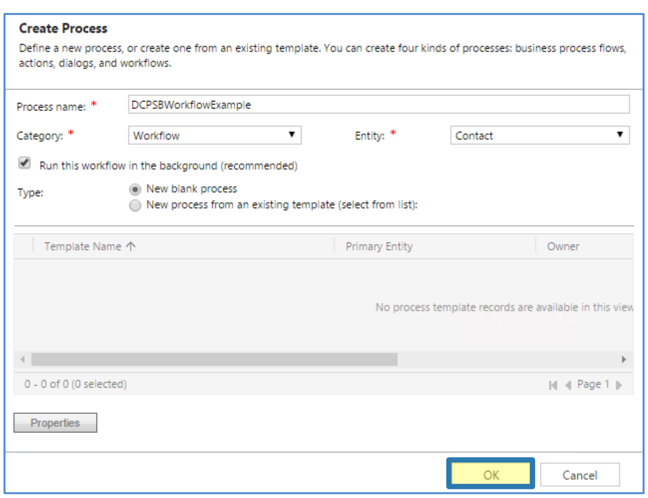


Figure 20: Create process dialog – filled (example)

Step 3: Customize the new workflow

Basically, you could start any workflow from the window that opens now with a click on the ***[Add Step]***-button. But to start DocumentsCorePack ServerBased from a workflow, you have to click on the ***[AutoMergeWF]***-button and select one of the eight DocumentsCorePack ServerBased steps.

Next, to the *Add Step*-functionality, you have the possibility to insert or delete random steps.

A click on the ***[Insert]***-button enables you to insert a random step between two already existing steps.
A click on the ***[Delete this Step]***-button enables you to delete this step.

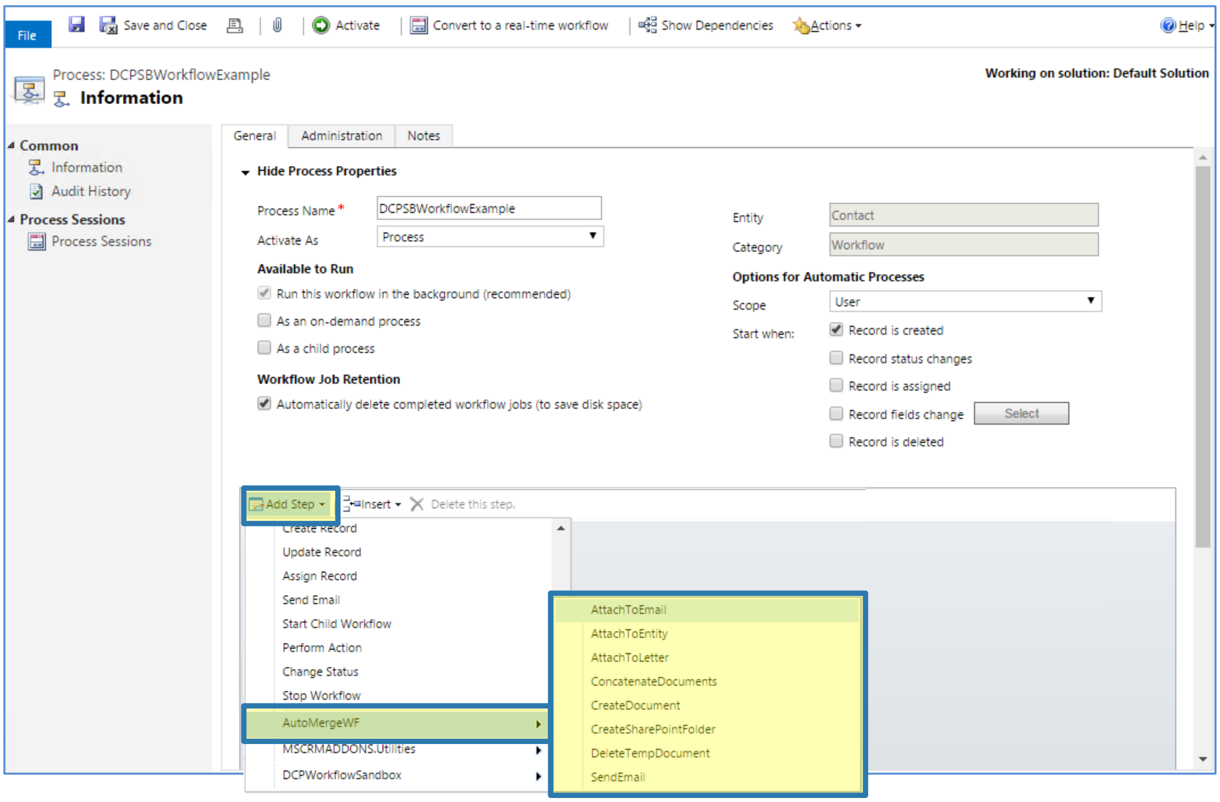


Figure 21: DocumentsCorePack workflow main surface

That's it!
Further information on how to create workflows in DocumentsCorePack (On Premise) can be found in chapter Creating workflows in an OnPremise environment.

Further information how to create workflows in DocumentsCorePack (Online) can be found in chapter Creating workflows in an Online environment.

3.4.2 DocumentsCorePack workflow activities (OnPremise)

DocumentsCorePack ServerBased workflow is delivered with the possibility to create eight different steps. Within the course of the next chapters, we will provide you with additional information on each DocumentsCorePack ServerBased step.

3.4.2.1 AttachToEmail

Select this option to attach a created document to an existing e-Mail. This step is also very often used in combination with the *SendEmail* step described ON PAGE 42.

This step only works efficiently as additional step to the *CreateDocument* step. Learn more about the *CreateDocument* step ON PAGE 36.

First, you may want to give your newly created step ❶ a name that reminds you of what it contains. Second, click on the ***[Set Properties]***-button ❷ in order to define the steps' settings.

Figure 22: Add step: AttachToEmail

The next window provides you with the AttachToEmail Properties.

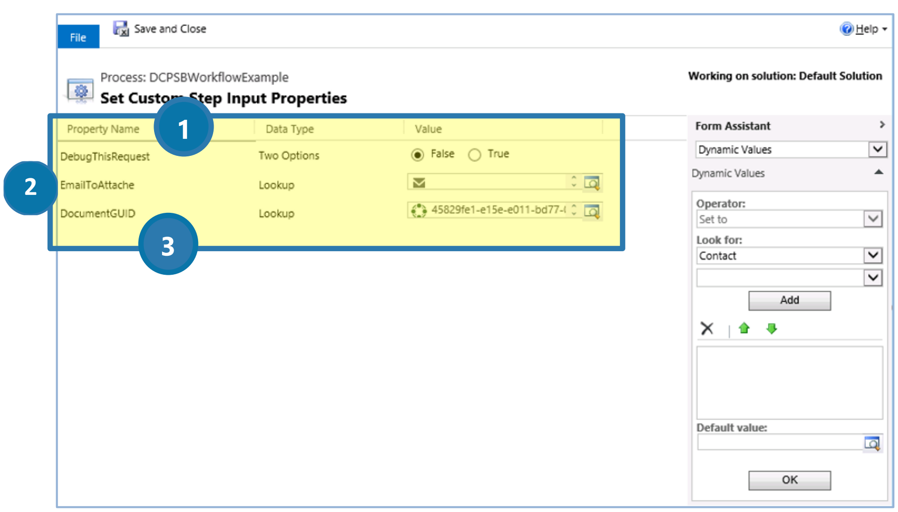


Figure 23: Add step: AttachToEmail Properties

Please find a detailed description to the AttachToEmail Properties below.
The *AttachToEmail* properties provide the following possibilities:

❶ DEBUGTHISREQUEST

If this box is set to *True* the DCP Server will write debug information while executing this request. This is only required if this part of the process does not work out correctly. Due to the fact that it will slow down the whole process, we recommend setting it to False during your everyday business.

❷ EMAILTOATTACH

This lookup enables you to define to which email the created document should be attached. You have the possibility to select an existing mail, but you could as well refer to an email that had been created earlier in this workflow.

❸ DOCUMENTGUID

This lookup provides the possibility to select the document which should be attached. The handling of this property is similar to ❷. You can select an existing document by clicking on the lookup button, but you could as well use a document that had been created in this workflow before.

3.4.2.2 AttachToEntity

Select this option if you want to attach a created document to any Microsoft Dynamics CRM standard and/or custom entity.

This step only works efficiently as additional step to the *CreateDocument* step. Learn more about the *CreateDocument* ON PAGE 36.

First of all, you may want to give your newly created step 1 a name that reminds you of what it contains. Second, click on the ***[Set Properties]***-button 2 in order to define the steps' settings.

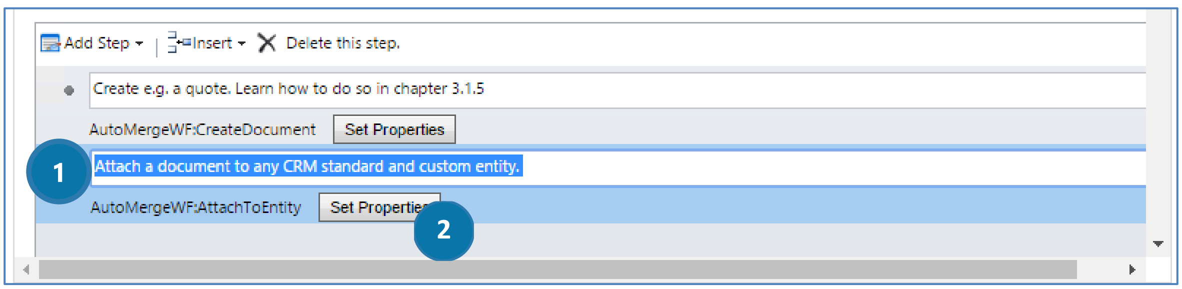


Figure 24: Add step: AttachToEntity

The next window provides you with the AttachToEntity Properties.

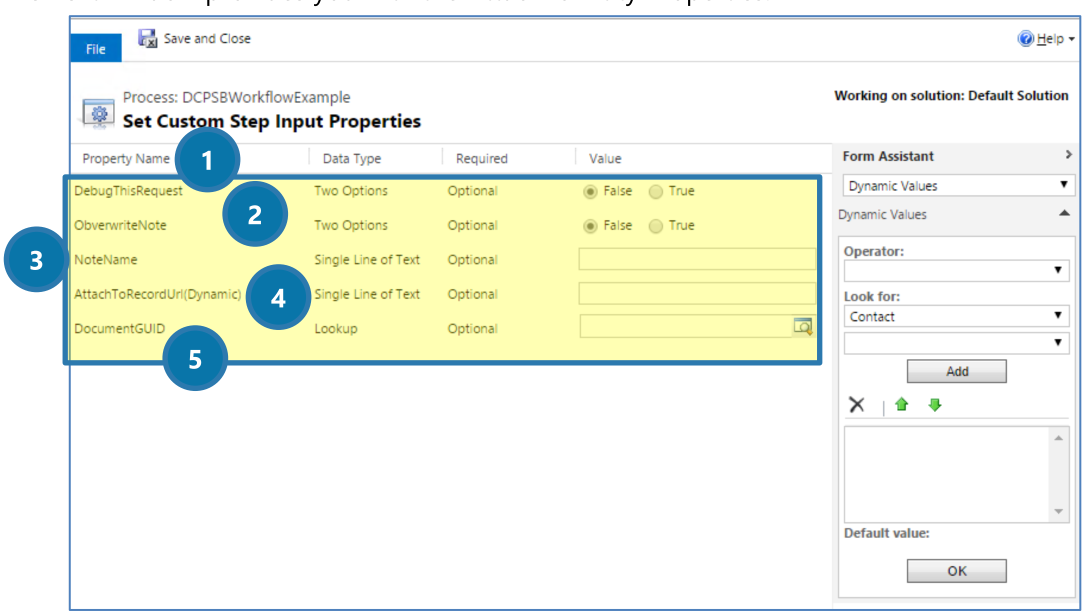


Figure 25: Add step: AttachToEntity Properties

Please find a detailed description to the AttachToEntity Properties below.

The *AttachToEntity* properties provide the following possibilities:

❶ DebugThisRequest

If this box is set to *True* the DCP Server will write debug information while executing this request. This is only required if this part of the process does not work out correctly. Due to the fact that it will slow down the whole process, we recommend setting it to False during your everyday business.

❷ OverwriteNote

Set this option to True if the note should be overwritten. Set this option to False if every note should be saved.

❸ NoteName

Define a name for the note.

❹ AttachToRecordUrl (Dynamic)

Connect your workflow with a dynamic record URL.

❺ DocumentGUID

This lookup provides the possibility to select the document which should be attached. You can select an existing document by clicking on the lookup button, but you could as well use a document that had been created in this workflow before.

3.4.2.3 AttachToLetter

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

This step only works efficiently as additional step to the *CreateDocument* step. Learn more about the *CreateDocument* step in CHAPTER 3.4.2.5 CREATEDOCUMENT ON PAGE 36.

First of all, you may want to give your newly created step 1 a name that reminds you of what it contains. Second, click on the ***[Set Properties]***-button 2 in order to define the steps' settings.

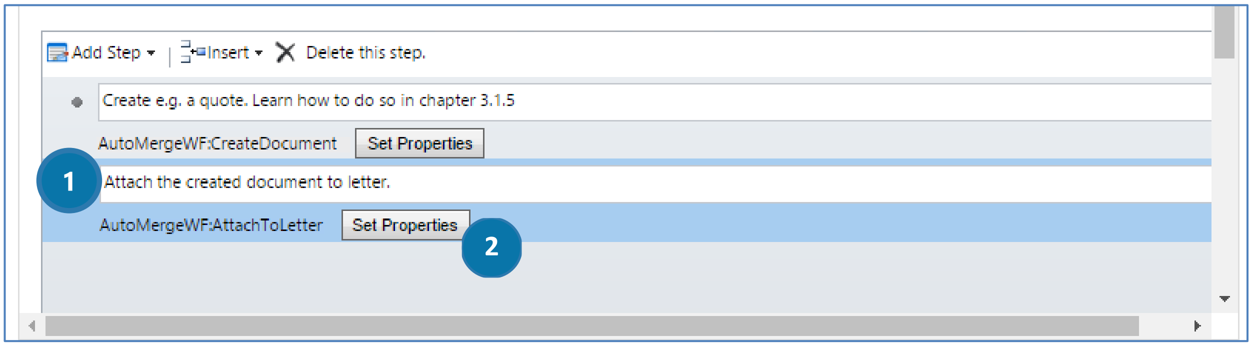


Figure 26: Add step: AttachToLetter

The next window provides you with the AttachToLetter Properties.

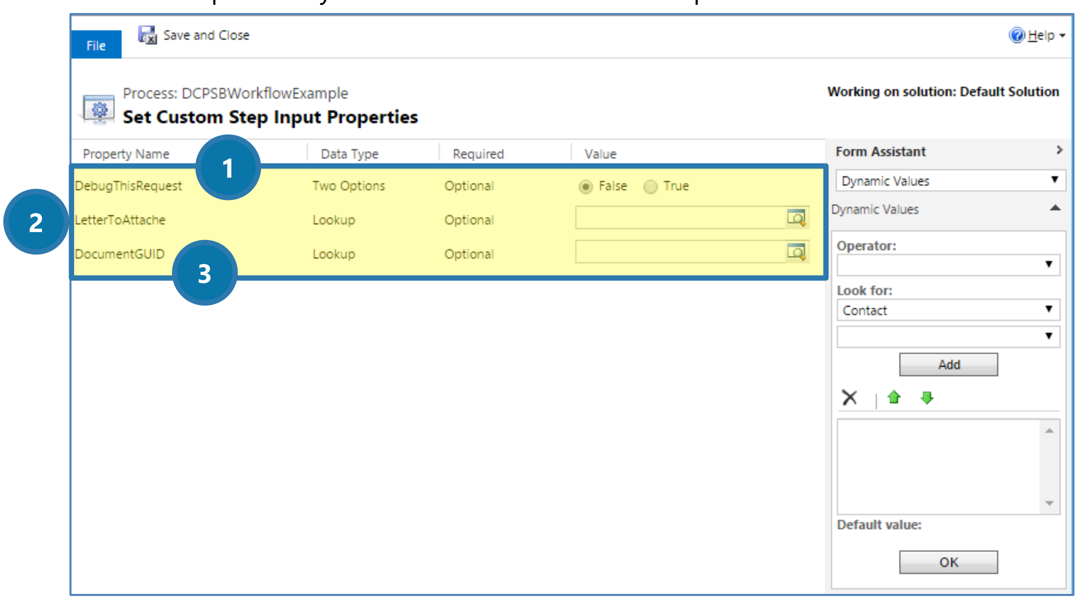


Figure 27: Add step: AttachToLetter Properties

Please find a detailed description to the AttachToLetter Properties below.

The *AttachToLetter* properties provide the following possibilities:

❶ DebugThisRequest

If this box is set to *True* the DCP Server will write debug information while executing this request. This is only required if this part of the process does not work out correctly. Due to the fact that it will slow down the whole process, we recommend setting it to False during your everyday business.

❷ LetterToAttach

This lookup can be used to define the letter to which the created document should be attached. You have the possibility to select an existing letter, but you could as well refer to a letter that had been created earlier in this workflow.

❸ DocumentGUID

This lookup provides the possibility to select the document which should be attached. You can select an existing document by clicking on the lookup button, but you could as well use a document that had been created in this workflow before.

3.4.2.4 ConcatenateDocuments

Select this option to concatenate different documents in one single document.

First of all, you may want to give your newly created step 1 a name that reminds you of what it contains. Second, click on the ***[Set Properties]***-button 2 in order to define the steps' settings

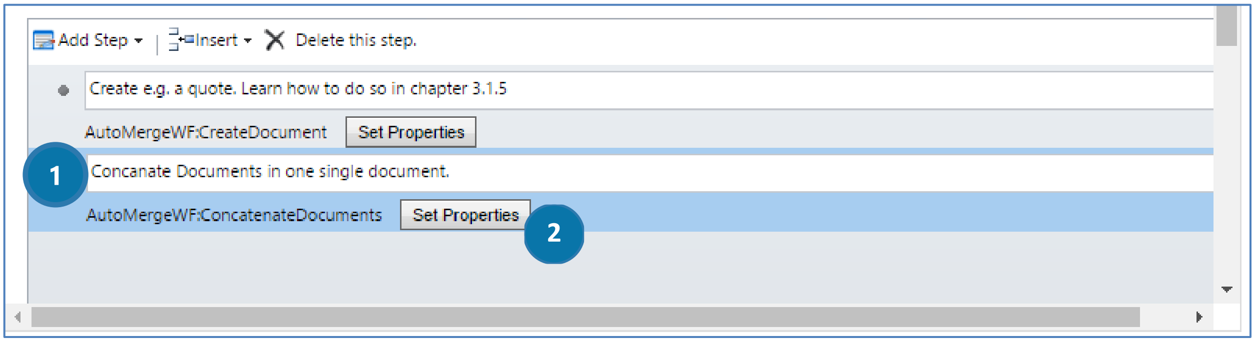


Figure 28: ConcatenateDocuments

The next window provides you with the ConcatenateDocument Properties.

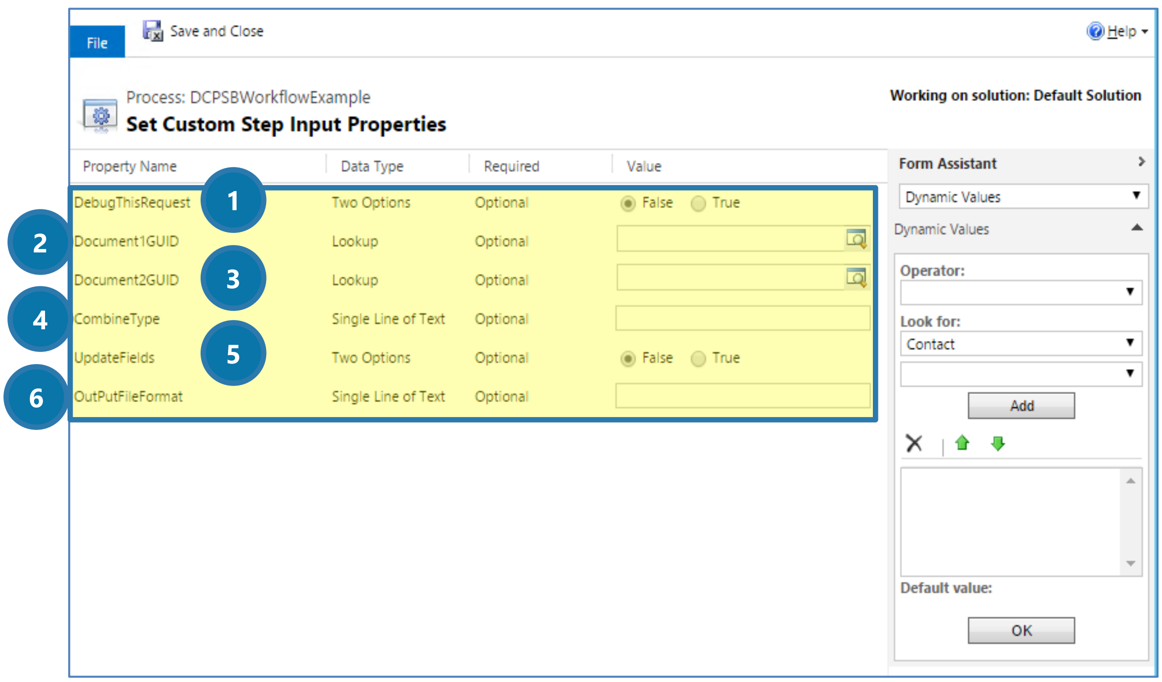


Figure 29: Add step: ConcatenateDocument Properties

Please find a detailed description to the ConcatenateDocument Properties below.

The *ConcatenateDocument* properties provide the following possibilities:

➊ DebugThisRequest

If this box is set to *True* the DCP Server will write debug information while executing this request. This is only required if this part of the process does not work out correctly. Because it will slow down the whole process, we recommend setting it to *False* during your everyday business.

➋ Document1Guid

This lookup provides the possibility to select the document which should be removed. You can select an existing document by clicking on the lookup button and you can also use a document created in this workflow before.

➌ Document2Guid

Offering the same functionalities like Document1Guid, this is the Document GUID for the second document you want to concatenate.

➍ CombineType

There are 5 different options that enable you to combine the documents' styles (so they all look similar).

Option 0

Select this option, if you want to **apply the style from the second document.**

```
"appenddocumentusedestinationstyle"
"0"
```

Option 1

Select this option, if you want to **apply the style from the first document.**

```
"appenddocumentkeepsourceformatting"
"1"
```

Option 2

Select this option, if you want to **apply the style from the second document** and combine the header & footer from the first & second document.

```
"appenddocumentkeepsourceformatting"
"2"
```

Option 3

Select this option, if you want to **apply the style and header & footer from the first document.**

```
"appenddocumentkeepsourceformatting"
"3"
```

Option 4

Select this option, if you want to **apply the style from the second document** and combine the header & footer from the first & second document. A page break will be added for the second document.

```
"4"
```

Option 5

Select this option, if you want to **apply the style and header & footer from the first document.** A page break will be added for the second document.

```
"5"
```

Option 6

Select this option, if you want to **attach the documents. Independent from the style.**

```
"appendcontent"
"99"
```

5 UpdateFields

Please set this field on true if you would like to update certain field functions when concatenating documents, like for example the TOC (table of content) or page numbers.

6 OutPutFileFormat

This field provides you with the possibility to set a certain file format to be output.

3.4.2.5 CreateDocument

Select this option to create a new document based on a template, e.g. a quote.

First, you may want to give your newly created step 1 a name that reminds you of what it contains. Second, click on the ***[Set Properties]***-button 2 to define the steps' settings

Figure 30: CreateDocument

The next window provides you with the CreateDocument Properties.

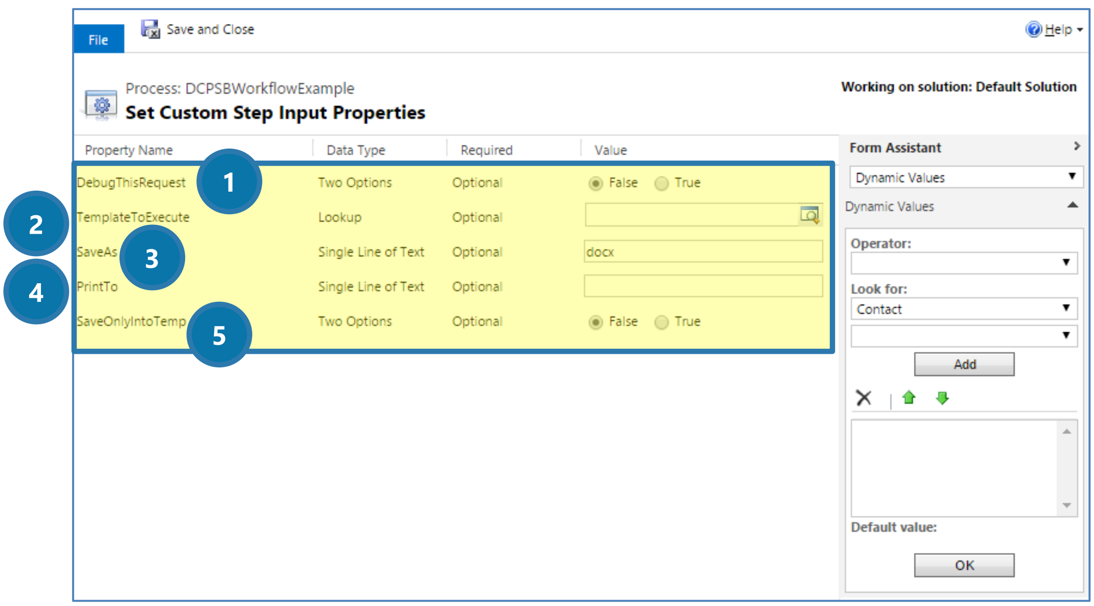


Figure 31: Add step: CreateDocument Properties

Please find a detailed description to the CreateDocument Properties below.

The *CreateDocument* properties provide the following possibilities:

1 DebugThisRequest

If this box is set to *True* the DCP Server will write debug information while executing this request. This is only required if this part of the process does not work out correctly. Due to the fact that it will slow down the whole process, we recommend setting it to *False* during your everyday business.

2 TemplateToExecute

Use this lookup-field to select a template. It will be the base of your generated document. You have the choice between all templates stored in the "DocumentsCorePack Templates" entity in Dynamics 365.

Please note: The selected template must be compatible with the entity of this workflow. Say, if you create, for example, a workflow for the entity *Contact*, the main entity of the selected template must be *Contact* as well. Please also keep in mind that **".dot"-templates only will work** with DocumentsCorePack ClientBased and not with DocumentsCorePack ServerBased.

3 SaveAs

Define the data type of the previously created document. The following file extensions are available. The left column shows the text you have to enter in order to receive the corresponding file extension on the right side. If left empty, the document is assigned a ".docx"-extension automatically.

Type in this...	... in order to receive this file extension.
text	.txt
png	.png
jpeg	.jpg
html	.html
epub	.epub
doc	.doc
docx	.docx
bmp	.bmp
pdf	.pdf

Figure 32: File extensions for documents

4 PrintTo

Define the path of a network printer. If DocumentsCorePack ServerBased can connect an available printer with this path, the document will be printed out after its creation.

5 SaveOnlyIntoTemp

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

3.4.2.6 CreateSharePointFolder

Select this option to automatically create SharePoint folder, subfolder, and locations.

The usage of SharePoint integration is mandatory if you want to apply this step!

First of all, you may want to give your newly created step ① a name that reminds you of what it contains. Second, click on the ***[Set Properties]***-button ② in order to define the steps' settings.

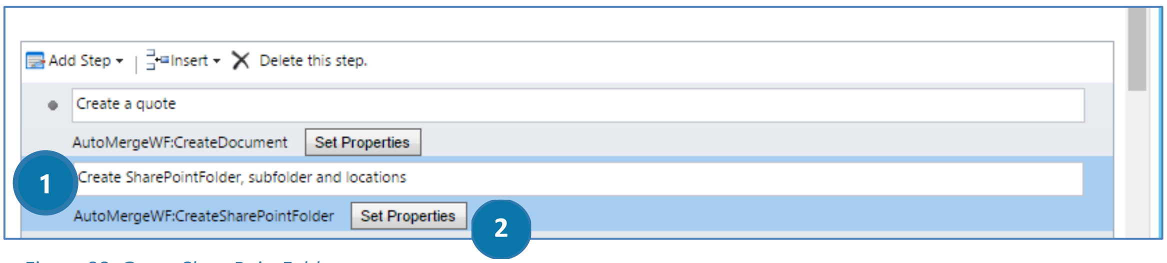


Figure 33: CreateSharePointFolder

The next window provides you with the CreateSharePointFolder Properties.

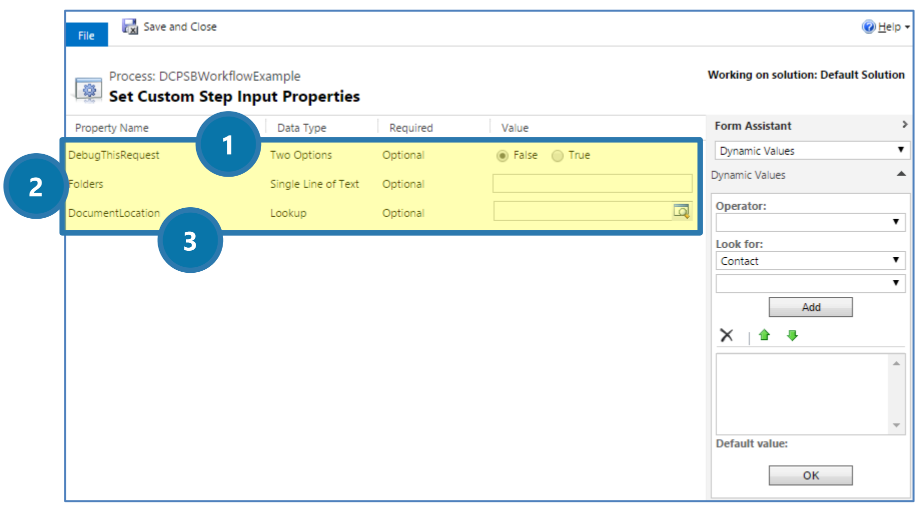


Figure 34: Add step: CreateSharePointFolder Properties

Please find a detailed description to the CreateSharePointFolder Properties below.

The *CreateSharePointFolder* properties provide the following possibilities:

❶ DebugThisRequest

If this box is set to *True* the DCP Server will write debug information while executing this request. This is only required if this part of the process does not work out correctly. Because it will slow down the whole process, we recommend setting it to *False* during your everyday business.

❷ Folders

You are able to define the SharePoint folder(s) and subfolder(s) here. Please apply the following logic to your structure.

Example: *TEST/subfolder1/subfolder 2;*

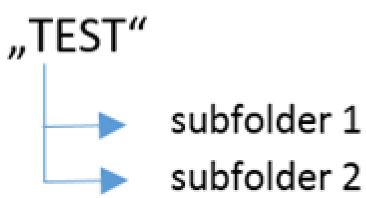


Figure 35: Structure of TEST/subfolder1/subfolder2

And a more practical example: Account/quotes/2017

Figure 36: Structure of Account/Quotes/2017

❸ DocumentLocation

You can search for a located document with a click on the Lookup field next to the *DocumentLocation* field.

For more information on this option, have a look at our How-to section. Please see chapter 7.4 How to create a SharePoint location manually (with examples) on page 74 and chapter 7.5 How to apply SharePoint, folder(s), subfolder(s)… automatically when an account is set up on page 77.

3.4.2.7 DeleteTempDocument

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

First of all, you may want to give your newly created step 1 a name that reminds you of what it contains. Second, click on the ***[Set Properties]***-button 2 in order to define the steps' settings.

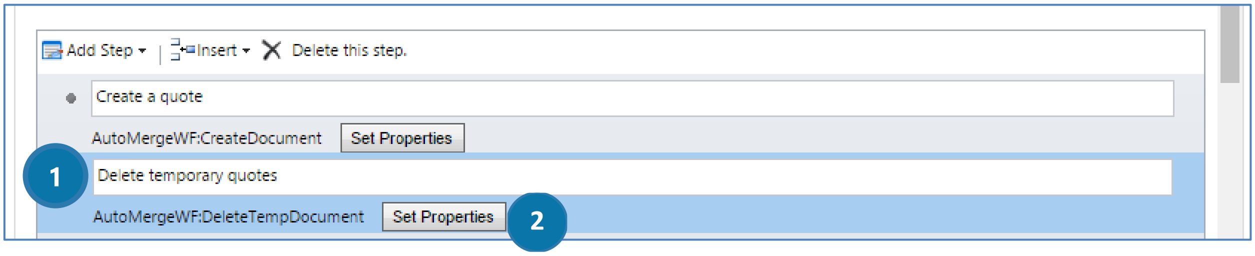


Figure 37: DeleteTempDocument

The next window provides you with the DeleteTempFolder Properties.

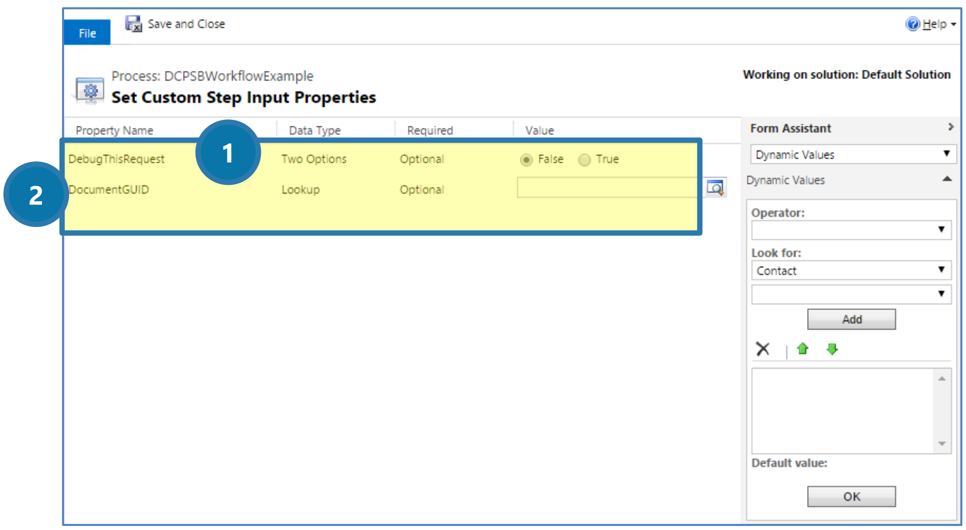


Figure 38: Add step: DeleteTempDocument

Please find a detailed description to the DeleteTempFolder Properties below.

The *DeleteTempDocument* properties provides you with the following properties:

❶ DebugThisRequest

If this box is set to *True* the DCP Server will write debug information while executing this request. This is only required if this part of the process does not work out correctly. Due to the fact that it will slow down the whole process, we recommend setting it to *False* during your everyday business.

❷ DocumentGuid

This lookup provides the possibility to select the document which should be removed. You can select an existing document by clicking on the lookup button, but you could as well use a document that had been created in this workflow before.

3.4.2.8 SENDEMAIL

First of all, you may want to give your newly created step 1 a name that reminds you of what it contains. Second, click on the ***[Set Properties]***-button 2 in order to define the steps' settings.

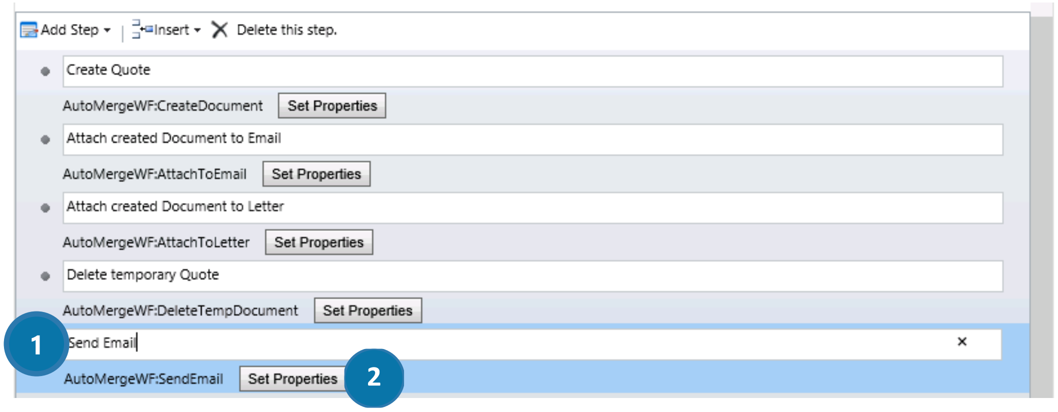


Figure 39: SendEmail

The next window provides you with the DeleteTempFolder Properties.

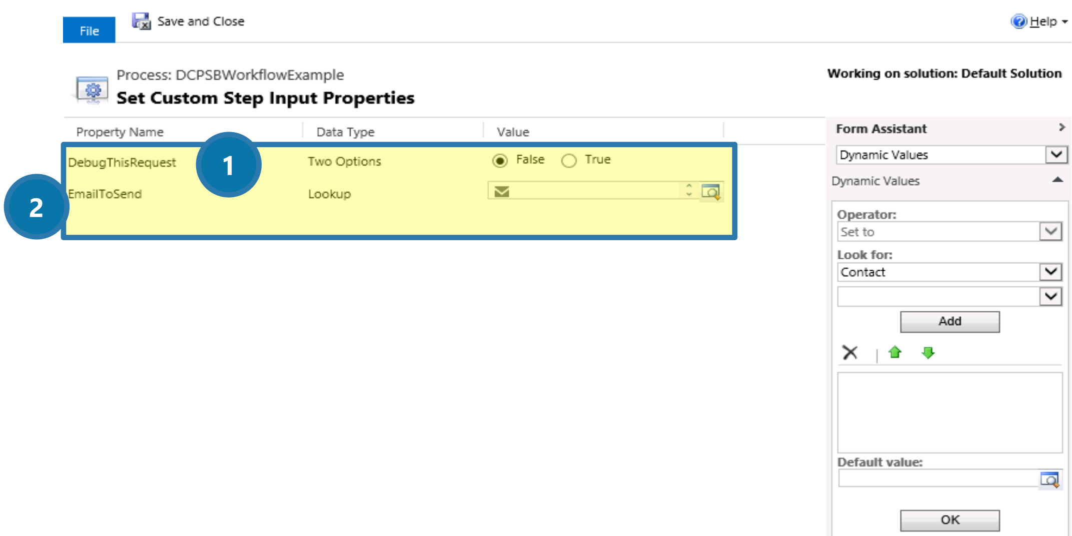


Figure 40: Add step: SendEmail

Please find a detailed description to the DeleteTempFolder Properties below.

The *SendEmail* properties provide you with the following properties:

❶ DebugThisRequest

If this box is set to *True* the DCP Server will write debug information while executing this request. This is only required if this part of the process does not work out correctly. Due to the fact that it will slow down the whole process, we recommend setting it to *False* during your everyday business.

❷ EmailToSend

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

3.5 Creating workflows in an Online environment

In this example, you will learn how to create workflows in Dynamics 365 Online.

3.5.1 How to create a workflow

Follow the next steps in order to create a new workflow in DocumentsCorePack Online:

STEP 1: HOW TO ACCESS THE SETTINGS PROCESSES

Open the Settings drop-down menu within Dynamics 365 and navigate to Processes.

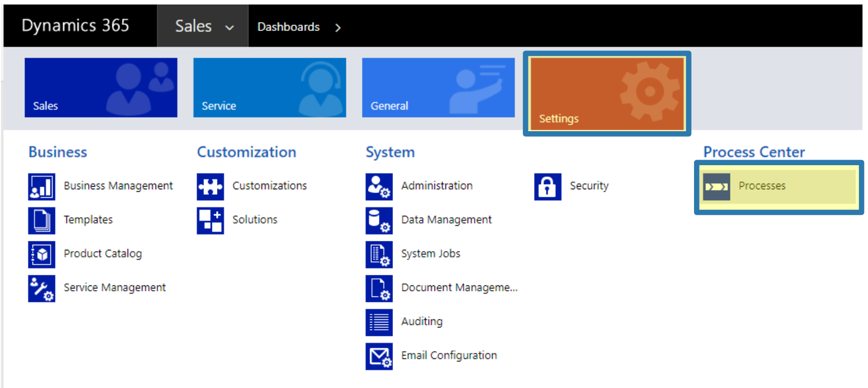


Figure 41: Enter Settings > Processes

STEP 2: CREATE A NEW PROCESS

Therefore, click on the ***[New]***-button in order to create a new workflow. A webpage dialog pops up. Type in a name, determine an entity and select "Workflow" as the process category. Afterwards, click on the ***[OK]***-button.

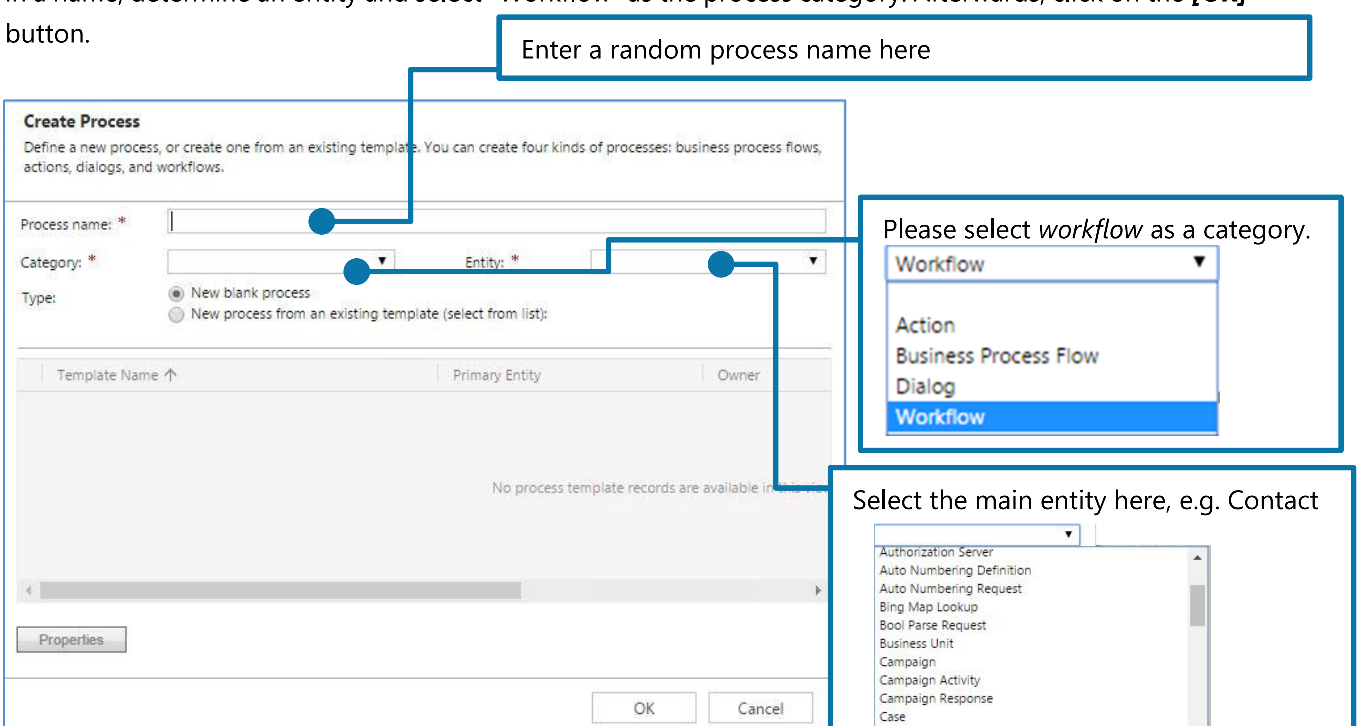


Figure 42: Create process dialog

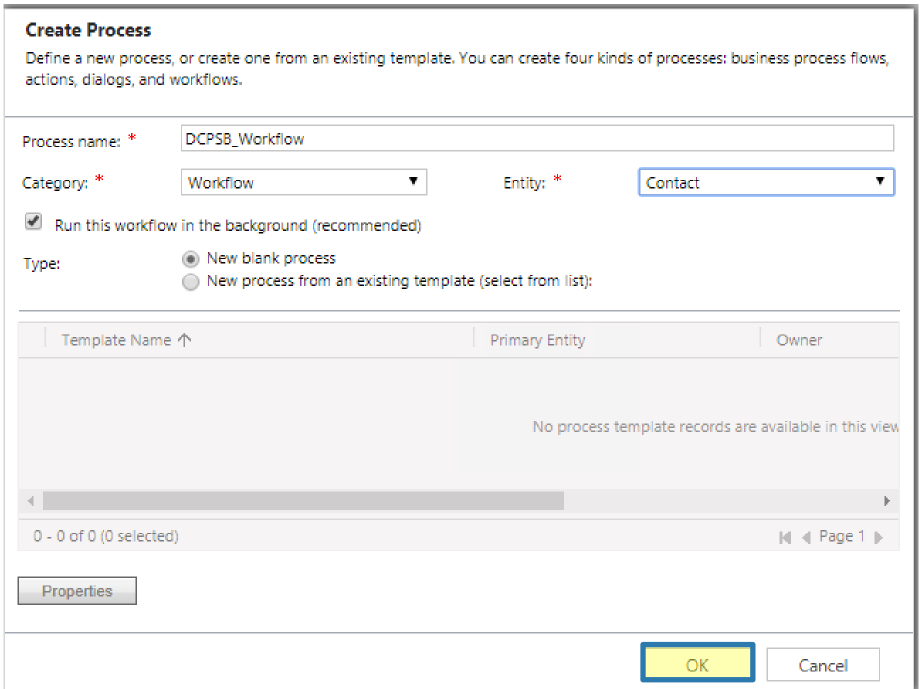


Figure 43: Create process dialog – filled (example)

After preparing your process please click on the the ***[OK]-button*** in the right lower corner in order to proceed as you can see in the figure above.

Step 3: Customize the new workflow

Depending on what your workflow should do, you now have to configure your steps.

3.5.2 Example: Create a workflow with DCP SB Online

In this chapter we want to show you how a workflow can be configured in DCP Online with the help of an example. Within this example, we will create the following steps:

1) Create a document (On page 45)
2) Insert a Wait Condition - Has the document creation been finished yet?
3) Attach document to letter – Step A (AttachToLetter)
4) Attach document to letter – Step B (AttachToLetter)
5) Insert a Wait Condition - Has the letter been attached yet?
6) Delete document (On page 53)

❶ CREATE DOCUMENT

This option supports you when dealing with the creation of documents. To create a new record (e.g. document), simply click on the ***[Add Step]***-drop-down menu ❶ and select *Create Record* ❷.

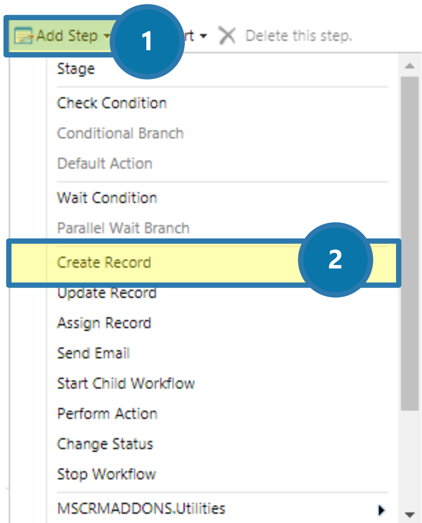


Figure 44: Add Step > Create Record

As soon as the step has been added to your workflow, you may want to give it a name that reminds you of what it contains, e.g. create document ❶. Then open the drop-down menu next to *Create*, select *MSCRM-ADDONS.com AutoMergeWorkingItems* ❷ and click on the ***[Set Properties]***-button ❸.

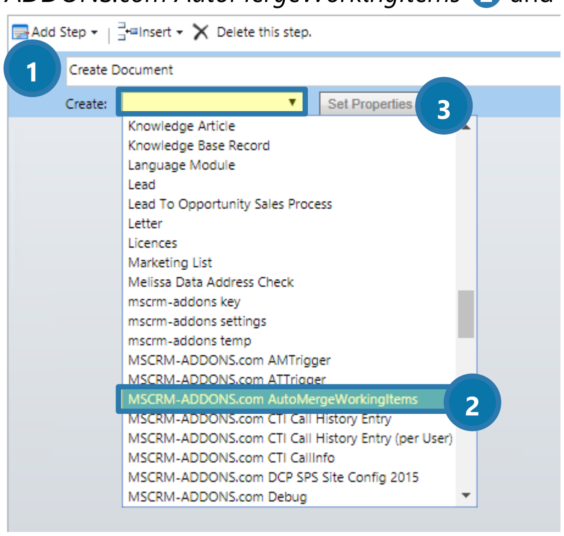


Figure 45: MSCRM-ADDONS.com AutoMergeWorkingItems Record

The dialog below opens. It allows you to configure the step of your workflow. Again, give it a name – in this case ❶ Create Document and look for ❷ CreateDocument in the *AutoMergeAction*-field.

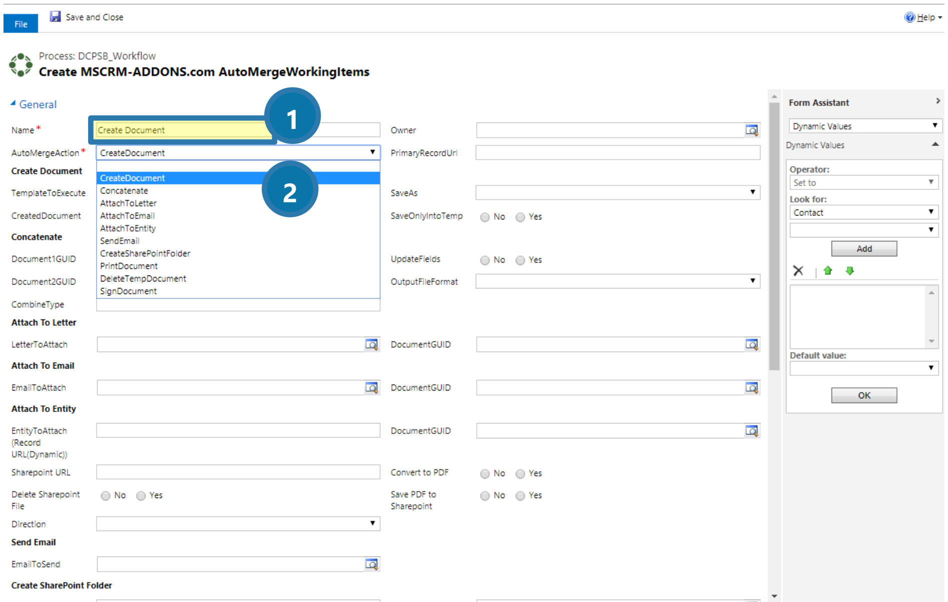


Figure 46: Set Properties – MSCRM-ADDONS.com AutoMergeWorkingItems Record

Now, click on the magnifying glass next to the *TemplateToExecute* field and select the template that should be used within the workflow ① and the file format the document should be saved as ② pdf.

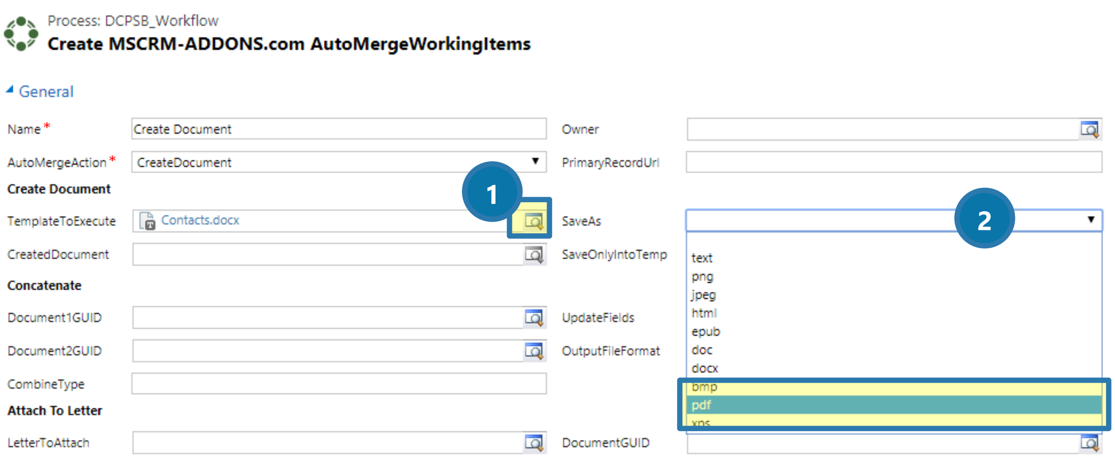


Figure 47: Select template to be executed

It is also very important to insert the *PrimaryRecordUrl*. To do so, set the cursor in the *PrimaryRecordUrl*-field ① and select *Record URL (Dynamics)* in the drop down-menu in the Form Assistant ②, click on the ***[Add]***-button and on the ***[OK]***-button. The *PrimaryRecordUrl*-field is filled now. Do not forget to save your changes!

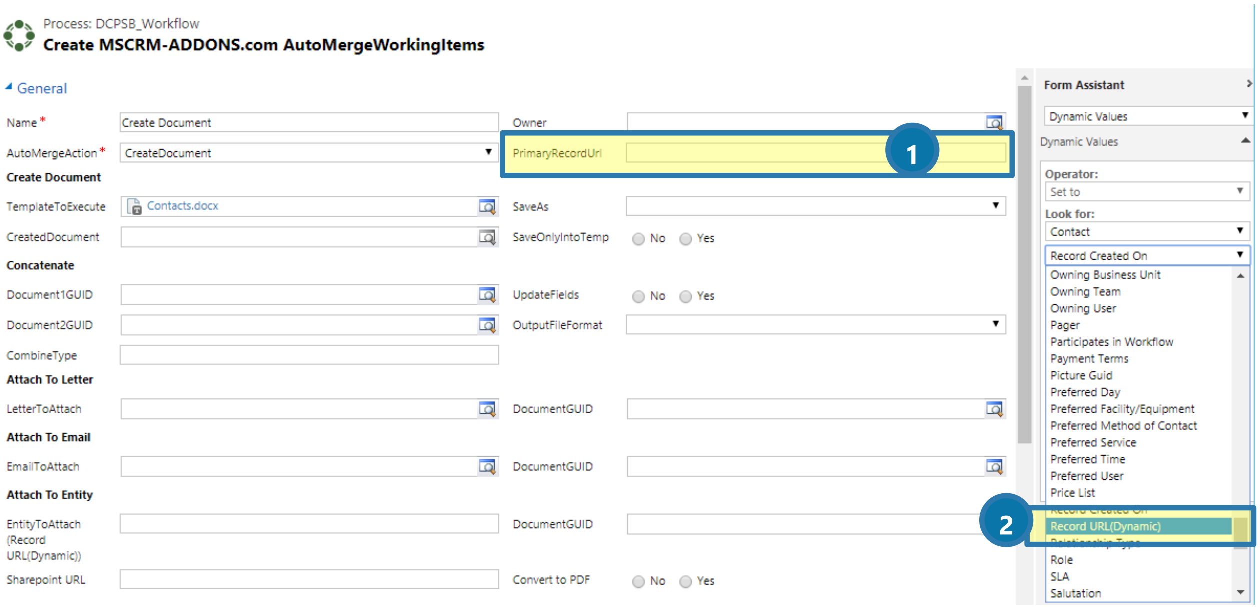


Figure 48: Insert the PrimaryRecordUrl

The first step of your workflow is now added and fully configured. If you want to stop your workflow at this point, please click on the ***[Save and Close]***-button and finish here. If you want to add further steps, you have to define a condition to be fulfilled before adding further steps.

2 WAIT CONDITION – HAS THE DOCUMENT CREATION BEEN FINISHED YET?

Whenever you add a step, you need to make sure that the step has been finished before you start with the next step. The *Wait condition step* checks this automatically.

For example, if you want to create a letter-activity with the previously generated document as an attachment, you need to make sure that the document creation is completed, before you attach the document to the letter activity. To do so, open the ***[Add-Step]***-drop-down menu and select the *Wait Condition*.

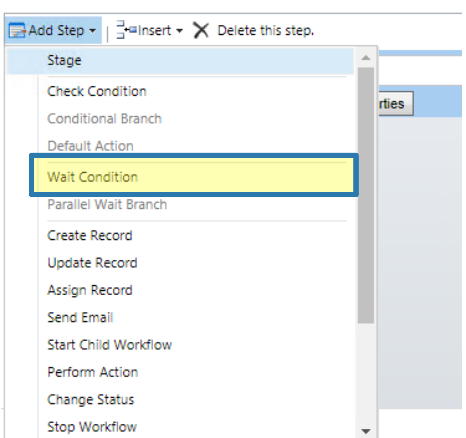


Figure 49: Add the Wait Condition

When the step has been added to your workflow, you may want to give it a 1 name that reminds you of what it contains, e.g. Wait condition. Then click on 2 *(click to configure).*

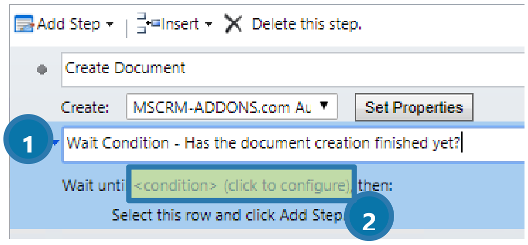


Figure 50: Name the Wait Condition

The next window allows you to configure the condition to be fulfilled for the workflow proceeding.

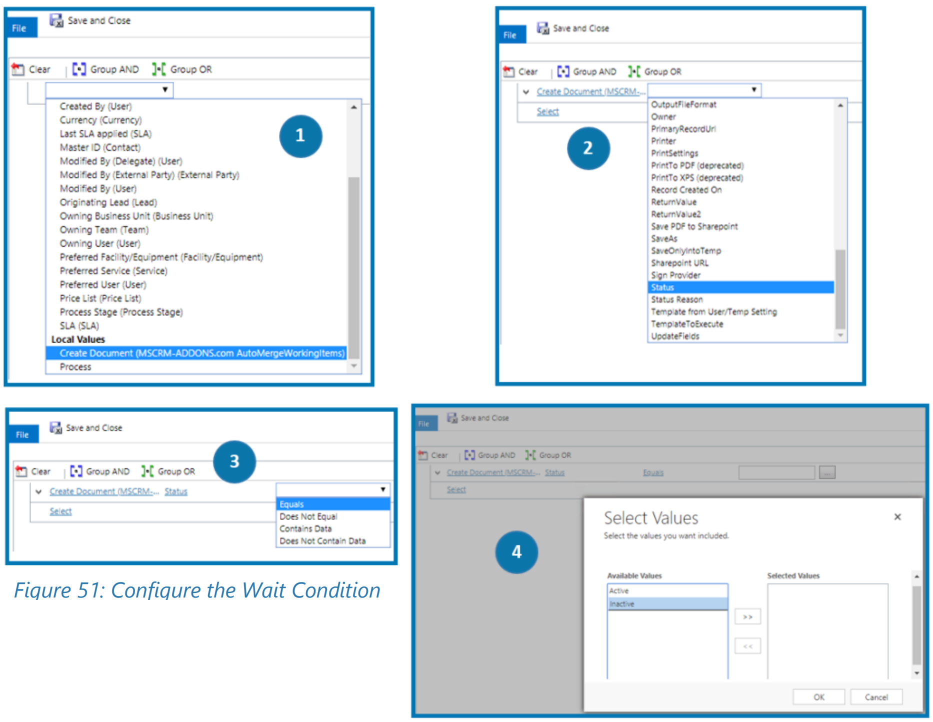


Figure 51: Configure the Wait Condition

Open the first drop-down menu that allows you to set the conditions for this step. For our purpose, we select ❶ *Create document (MSCRM-ADDONS.com AutoMergeWorkingItems)*, ❷ *Status* and as operator ❸ *Equals* and ❹ *Inactive* from the *Select Values* dialog.
By setting this step, you have determined that step 2 of this workflow will only be executed if step 1, the document generation, has been finished successfully.

❸ Attach Document to letter – Step A

This step enables you to attach a document to an already existing letter. To add the next step, simply click on ❶ *Select this row and click Add Step* and afterwards, click on the ❷ ***[Add Step]***-button and select *Create Record* from the drop-down menu.

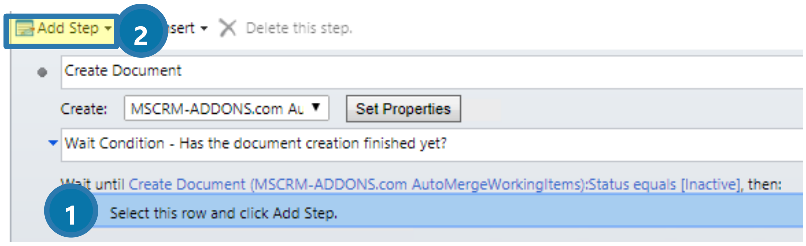


Figure 52: Add Step – Create Record

When the step has been added to your workflow, you may want to give it a name that reminds you of what it contains, e.g., ❶ *Attach document to letter – Step A*. Then open the drop-down menu, select ❷ *Letter* and click on the ❸ ***[Set Properties]***-button.

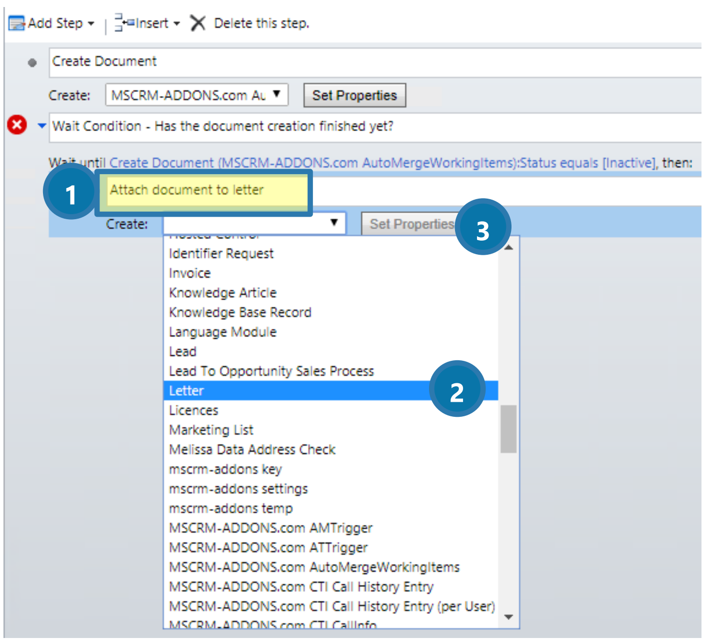


Figure 53: Name the step

Within the next window, you must define a sender and a subject and type in the letter's text. To define the recipient, click in the ❶ *Recipient*-field and go to the *Look for*-area within the *form assistant* on the right side. Select ❷ ***Contact*** in both drop-down-menus, click on the ❸ ***[Add]***-button and then on the ***[OK]***-button. Once finished, do not forget to save your settings.

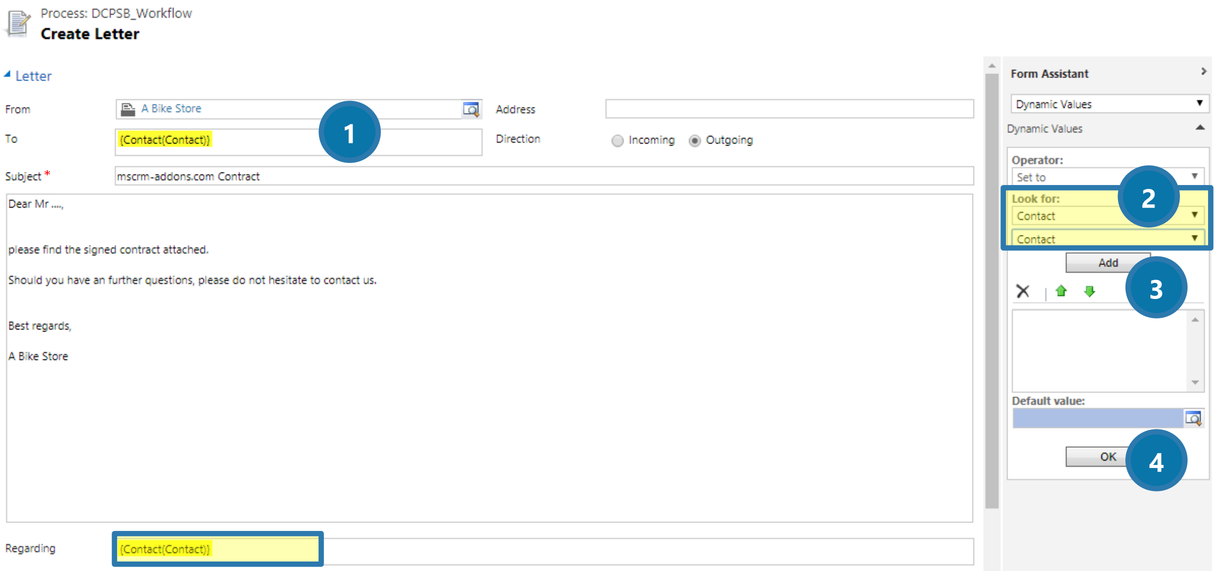


Figure 54: Set the recipient

4 ATTACH DOCUMENT TO LETTER – STEP B

This step makes sure that the previously created document will be added to the letter-activity. To attach a document to the letter, simply click on the 1 ***[Add Step]***-drop-down menu and select 2 *Create Record* as explained before.

After your step has been added to your workflow, please give it a name – in this case 1 *Attach document to letter – Step B*. Then select 2 *MSCRM-ADDONS.com AutoMergeWorkingItems* in the drop-down menu and click on the 3 ***[Set Properties]***-button.

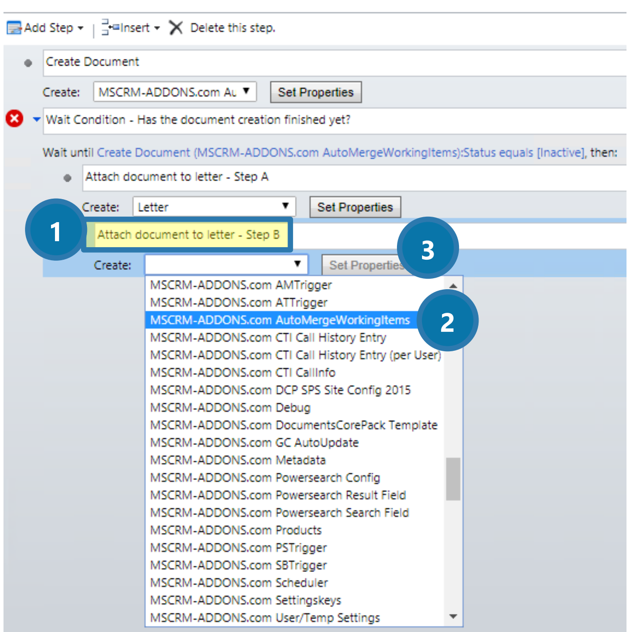


Figure 55: Attach document to letter – Step B

Next, name and define the corresponding *AutoMergeAction* – in this case ① *AttachToLetter*. Within the *Attach to Letter*-section, you can determine the letter-activity to which the created document will be attached to and the document which should be attached.

To **determine the letter-activity**, which the document should be attached to, set the cursor in the ② *LetterToAttach*-field in the *AttachToLetter*-section and select ③ *CreateDocument (MSCRM-Addons.com AutoMergeWorkflow)* from the first drop-down menu in the *Look For*-section and *LetterToAttach* from the second within the form assistant on the right side. Once finished, click on the ④ ***[Add]***-button and then on the ⑤ ***[OK]***-button.

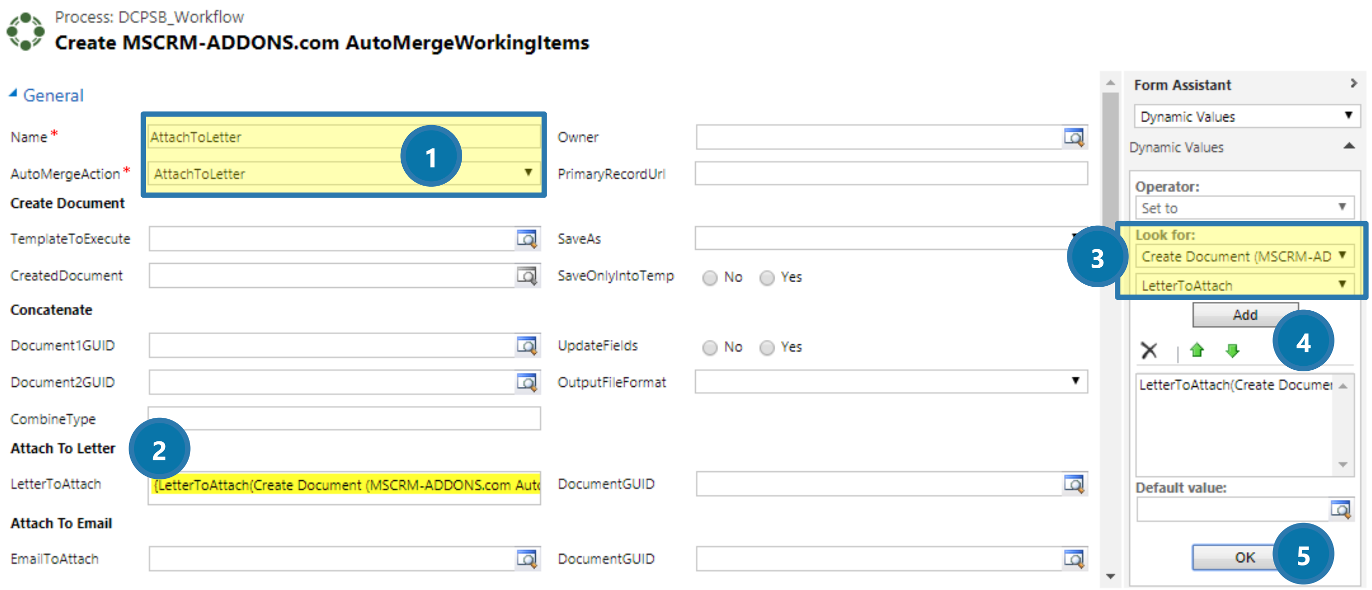


Figure 56: Step 1: Determine the letter activity

To **determine the document** which should be attached, set the cursor in the 1 *DocumentGUID_Letter*-field and select the correct document from the drop-down box in the 2 *Look For*-section within the form assistant on the right side. Then click on the ***[Add]***-button and on the ***[OK]***-button.

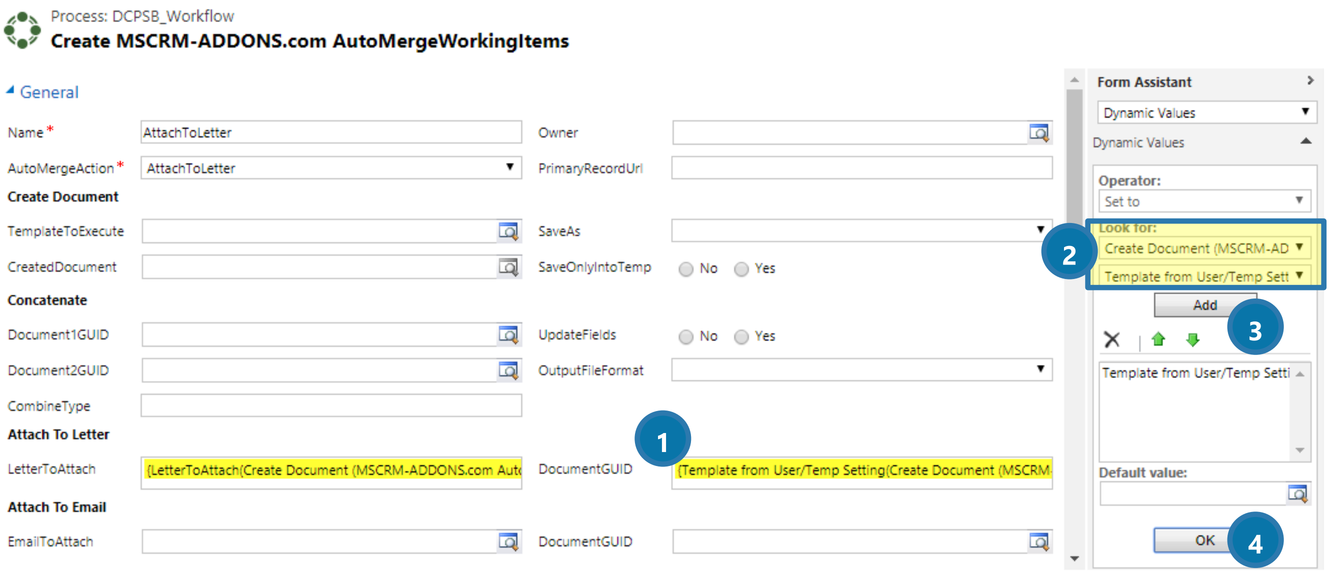


Figure 57: Step 2: Determine the document activity

You have now completed the configuration of this step. Do not forget to save the settings!
However, if you want to stop your workflow at this point, simply click on the ***[Save and Close]***-button within the general workflow-configuration-window and finish here.

5 WAIT CONDITION – HAS THE LETTER BEEN ATTACHED YET?

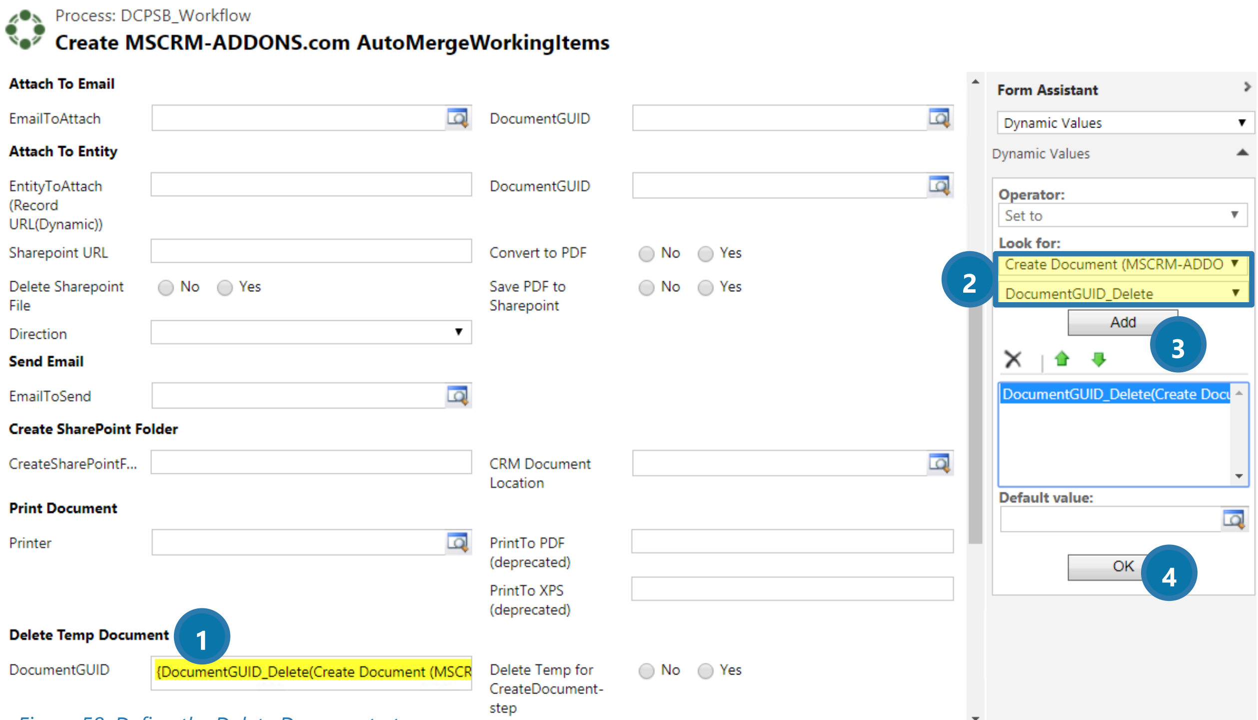
In this example we want to add further steps to this workflow. Please define another *Wait Condition* to be fulfilled before you add further workflow-steps. Configure your Wait Conditions as explained before in Step 2)

6 DELETE DOCUMENT

However, as soon as the condition is set, you can add another step. In our example, we want the document to be deleted after it has been attached to the letter-activity.

To create this step, click on *Select this row and click Add Step* and open the ***[Add Step]***-drop-down menu. Select *Create Record* and type in a description. Select *MSCRM-ADDONS.com AutoMergeWorkingItems* from the drop-down box within the step and click on the ***[Set Properties]***-button.

A dialog pops up in which you can set that the document will be deleted. To do so, name the process and the action (we decided to call the process '*DeleteTempDocument*'). Afterwards, click in the 1 *DocumentGUID_Delete*-field within the *Delete Temp Document*-section and select the document to be deleted from the drop-down box in the 2 *Look For*-section within the form assistant. Click on the 3 ***[Add]***-button and then on the 4 ***[OK]***-button. Do not forget to save your settings!



-Figure 58: Define the Delete Document-step

If you have followed all the steps, your result should look similar to the below screenshot.

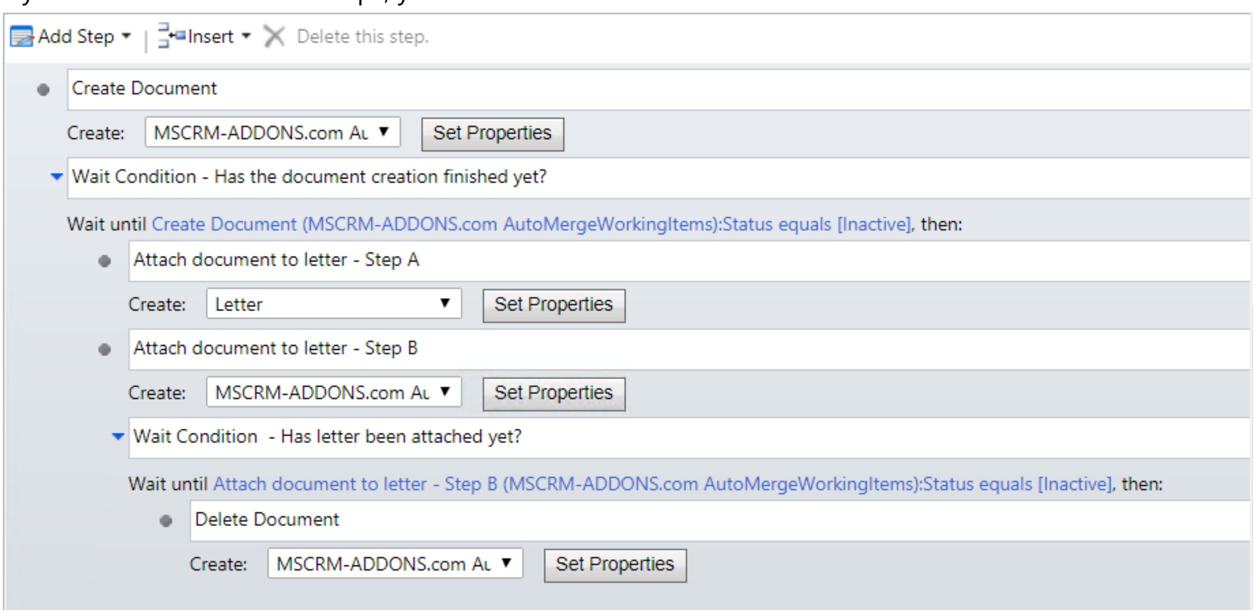


Figure 59: The result of the workflow

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

Usually, you would save it on SharePoint or attach it to an activity and delete it at the end of the process by using *DeleteTempDocument* step. But sometimes, it is very helpful not to delete documents automatically. For example, if you want to continue working with this temp document.

Learn how to do so in our Step by Step tutorial in CHAPTER 7.8 HOW TO NOT TO DELETE TEMP DOCUMENTS AUTOMATICALLY ON PAGE 105.

This workflow also works for DCP OnPremise if the DCP Service is installed locally but not otherwise!
More information can be found in the corresponding documentation.

4 DCP Client / Templates

DocumentsCorePack offers a great tool that helps you to create templates: the DCP Template Designer.

To be able to create or modify templates the DocumentsCorePack Client is required. It can be downloaded from our website by using the following link: DocumentsCorePack. But before you install the DCP Client, we recommend reading the "Install Guide". The guide can be found here: Installing DocumentsCorePack.

Additional information for administrators:
The Template Designer documentation will help you to modify the Template Designer for your team.

5 DCP Template Import Manager

If you are using the latest version of DCP, you will find the DCPIE (highlighted in yellow) in the install directory, which allow you to easily import, export or transfer templates from a source organization to a target organization.

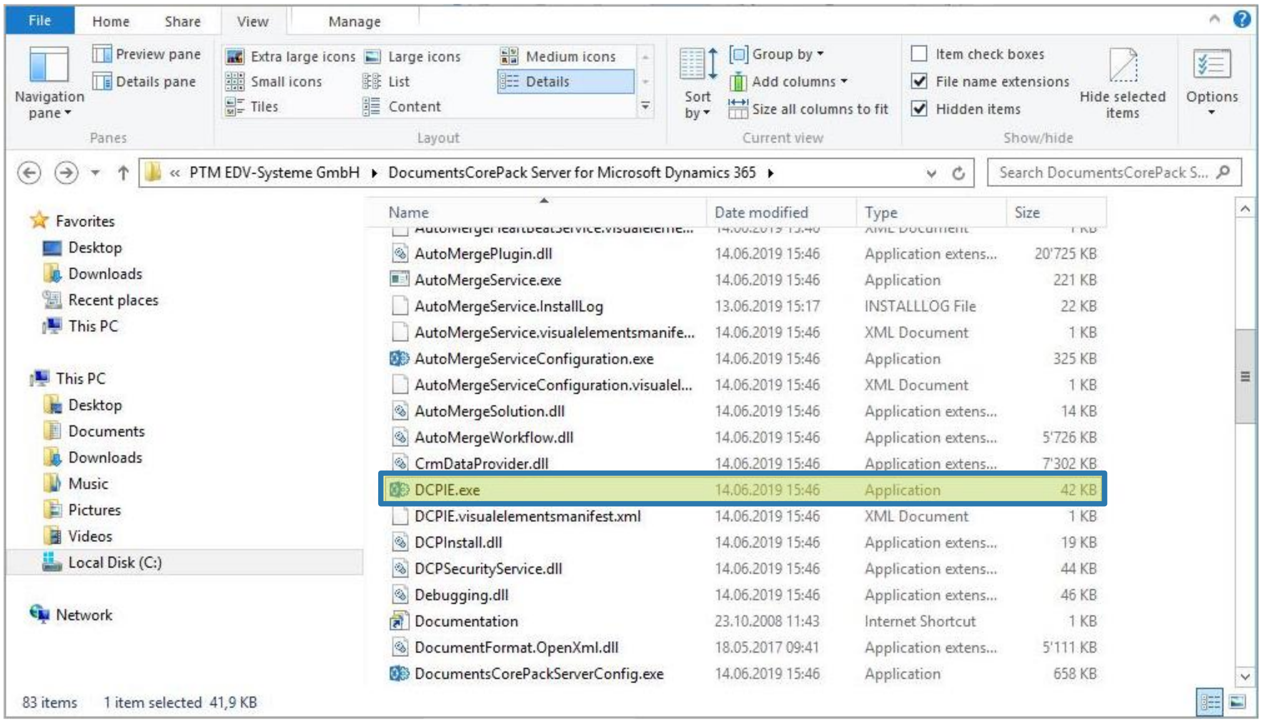


Figure 60: The DCPIE

5.1 The TemplateImportManager

Open your DocumentsCorePack install directory and select the TemplateImportManager. A double-click on the Application opens the Template Import Manager dialog, which allows you to either import, export or transfer your DocumentsCorePack templates. These three options will be explained in this chapter.

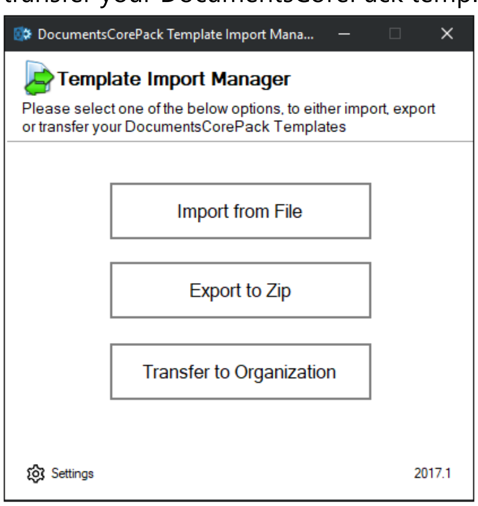


Figure 61: The Template Import Manager dialog

5.1.1 Import from Zip

Like it says, the first option allows you to import templates. After hitting on the ***[Import from Zip]***-button, the window below opens. Here you have to specify a connection to the organization where you want to import your templates. Therefore, select an ❶ existing profile, click on the ❷ ***[Retrieve all]***-button, select the ❸ target organization you wish and hit the ***[OK]***-button.

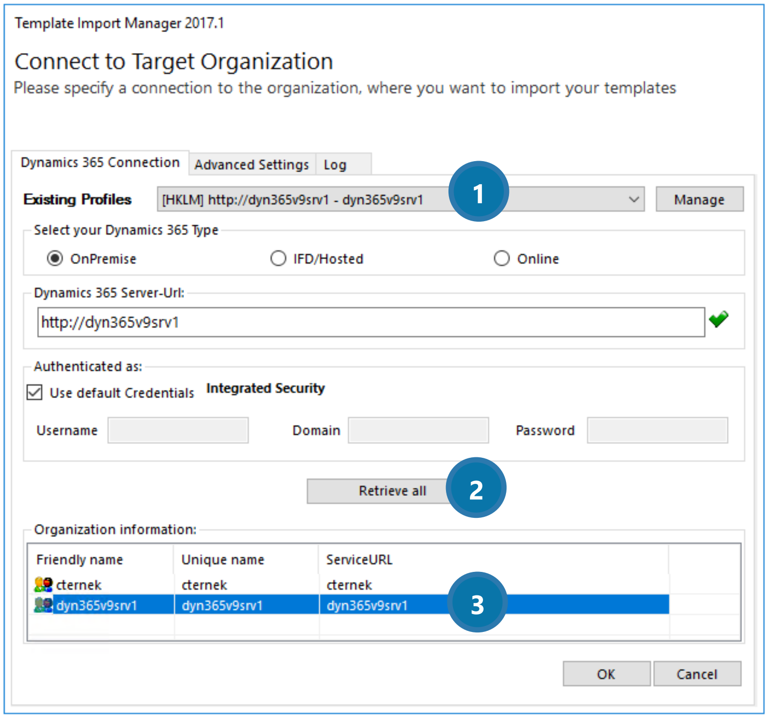


Figure 62: Connect to Target Organization

Next, double-click on the 1 ***[Load from Zip]***-button and open the directory containing your Zip-file – 2 "Export" in this case.

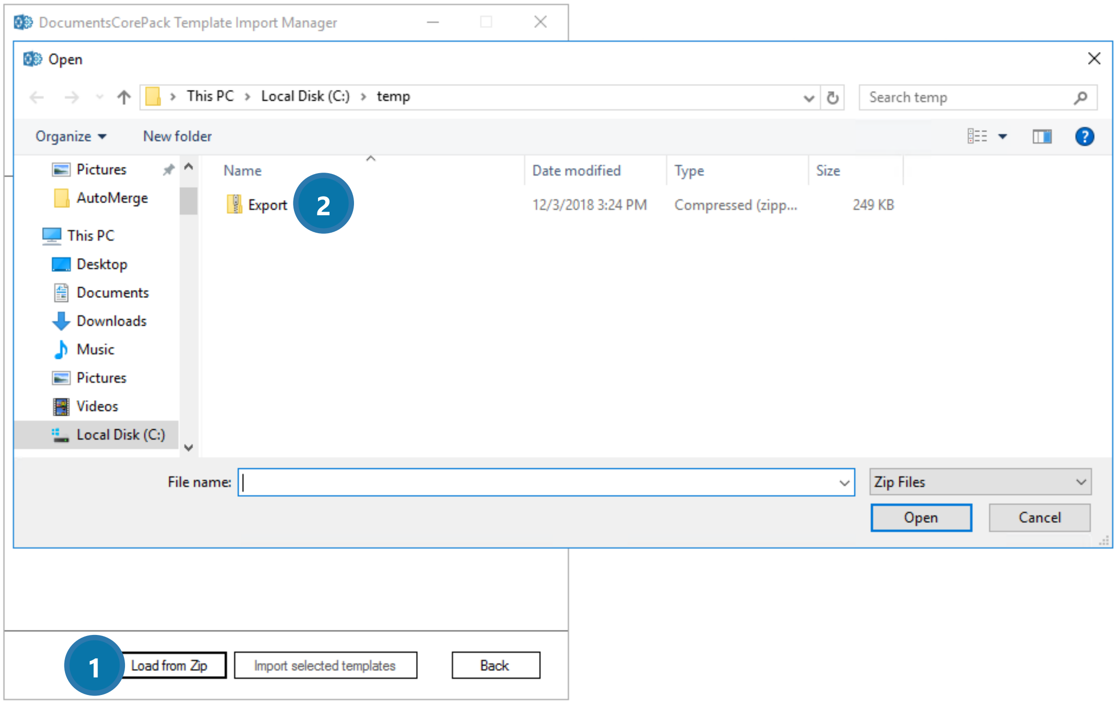


Figure 63: Load from Zip

Next, open your Zip-file and select the templates you want to import. It is possible to 1 "Select All" or single templates from your Zip-file by checking the corresponding checkboxes on the left side. Click on the 2 ***[Import selected templates]***-button to finish the Import.

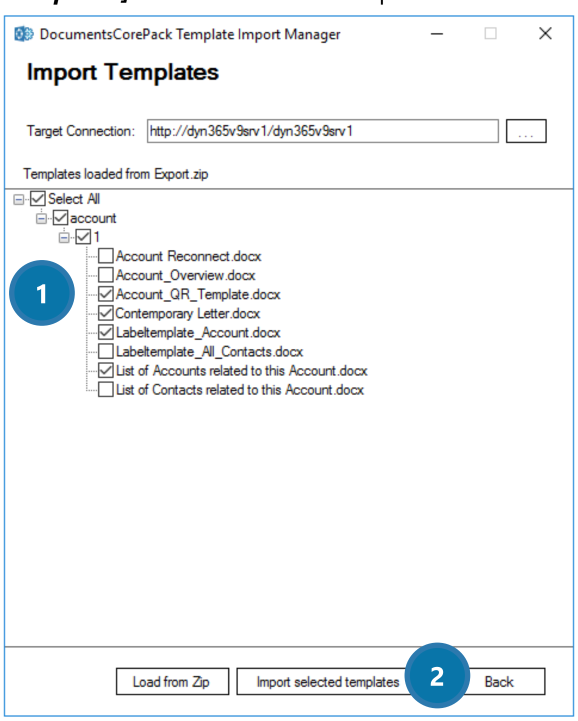


Figure 64: Select templates to import

5.1.2 Export from Zip

Hit on the ***[Export from Zip]***-button to export DCP templates. Here you have to specify a connection to the organization from where you want to export your templates. Like explained before, select an 1 existing profile, click on the 2 ***[Retrieve all]***-button, select the 3 source organization you wish and hit on the ***[OK]***-button.

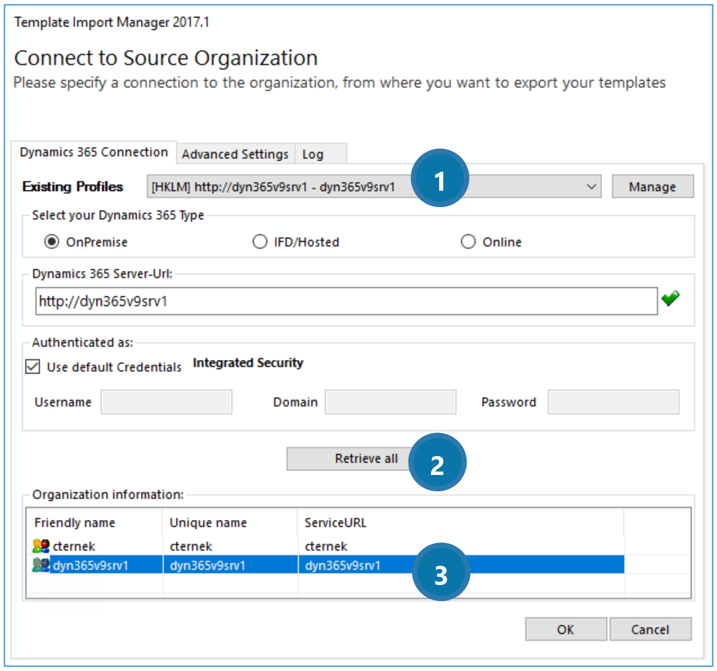


Figure 65: Connect to Source Organization

As mentioned before, double-click on the ***[Load from Zip]***-button and select the templates you want to export by selecting 1 all or only single template from your Zip-files. Click on the 2 ***[Export]***-button to finish the Export.

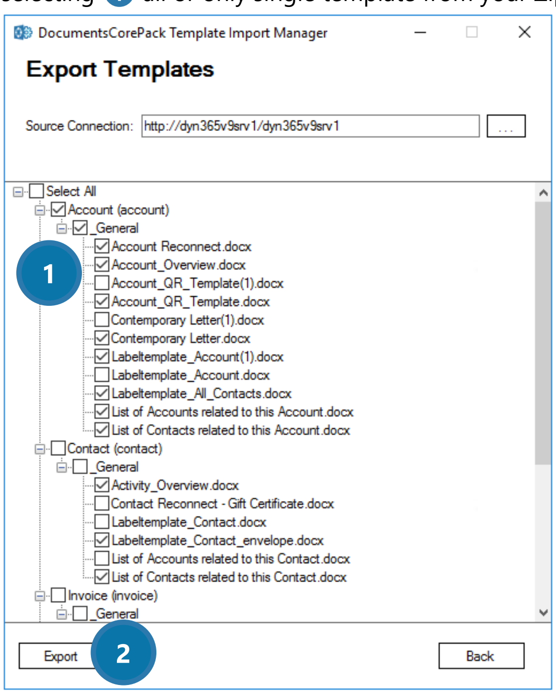


Figure 66: Select templates to export

5.1.3 Transfer to Organization

The third option allows you to transfer DCP templates from a source organization to a target organization. Therefore, please select the ❶ source and the ❷ target organization, like explained before. Next, select the ❸ templates you want to transfer and hit the ❹ ***[Transfer]***-button.

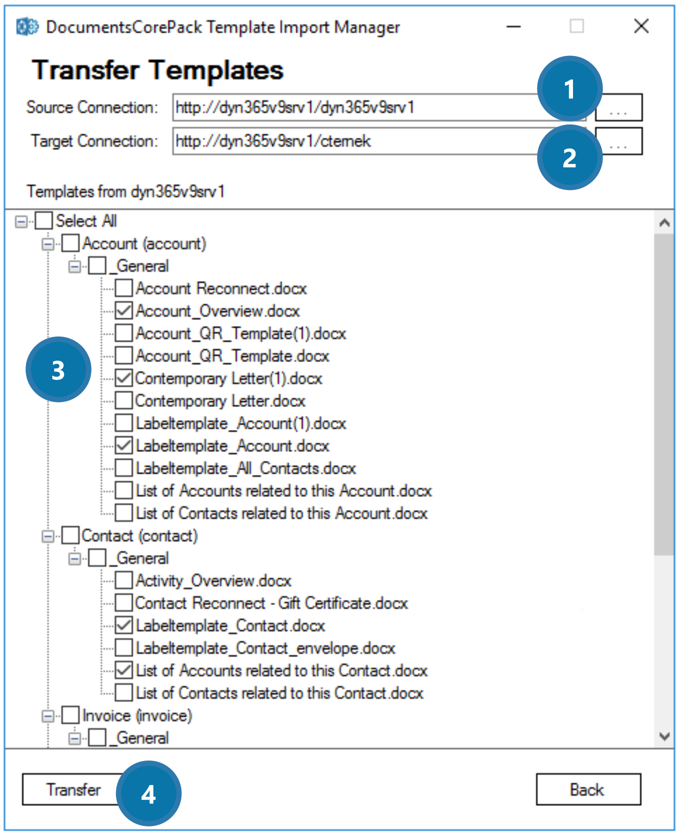
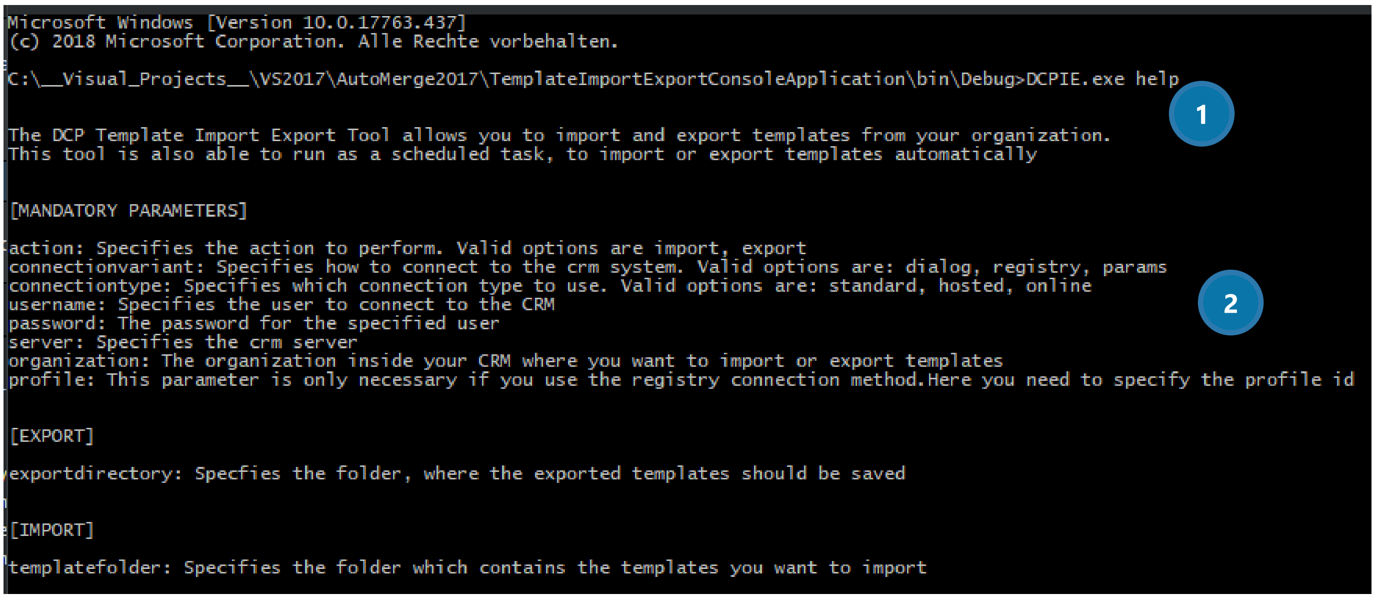


Figure 67: Transfer templates between organizations

5.2 DCPIE

The TemplateImportExportConsoleApplication does the same as the TemplateImportManager – it automates the actions: import and export.

Therefore, please open your cmd from the Start pane or by pressing the Windows key + R. Next, search for the DCPIE.exe and enter the command 1 help. This action displays you 2 a list of parameters which are needed to perform the necessary actions as you can see in the figure below.

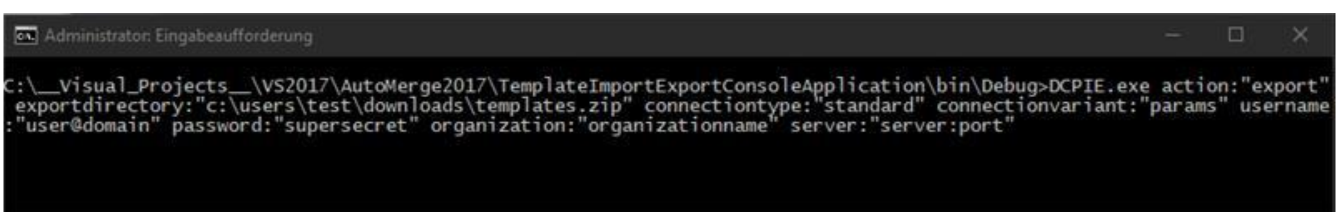


```
Microsoft Windows [Version 10.0.17763.437]
(c) 2018 Microsoft Corporation. Alle Rechte vorbehalten.

C:\__Visual_Projects__\VS2017\AutoMerge2017\TemplateImportExportConsoleApplication\bin\Debug>DCPIE.exe help

The DCP Template Import Export Tool allows you to import and export templates from your organization.
This tool is also able to run as a scheduled task, to import or export templates automatically

[MANDATORY PARAMETERS]

action: Specifies the action to perform. Valid options are import, export
connectionvariant: Specifies how to connect to the crm system. Valid options are: dialog, registry, params
connectiontype: Specifies which connection type to use. Valid options are: standard, hosted, online
username: Specifies the user to connect to the CRM
password: The password for the specified user
server: Specifies the crm server
organization: The organization inside your CRM where you want to import or export templates
profile: This parameter is only necessary if you use the registry connection method.Here you need to specify the profile id

[EXPORT]

exportdirectory: Specfies the folder, where the exported templates should be saved

[IMPORT]

templatefolder: Specifies the folder which contains the templates you want to import
```

Figure 68: List of parameters of the DCPIE

5.2.1 Export/import templates via the DCPIE

The following scenario explains the syntax of an export process. If you want to export templates and handle the necessary arguments by yourself, you need to use the **params** argument, which indicates that you are providing these parameters. The function looks like in the figure below.



```
Administrator: Eingabeaufforderung

C:\__Visual_Projects__\VS2017\AutoMerge2017\TemplateImportExportConsoleApplication\bin\Debug>DCPIE.exe action:"export"
 exportdirectory:"c:\users\test\downloads\templates.zip" connectiontype:"standard" connectionvariant:"params" username
:"user@domain" password:"supersecret" organization:"organizationname" server:"server:port"
```

Figure 69: Syntax to export templates

The arguments in the **export scenario** are the following:

- **Connectionvariant**:
  - Parameter:
    action: Defines which operation should be performed (allowed are „import" and „export").
    connectionvariant: Defines how to connect to Dynamics 365 (allowed options are: params, registry and dialog).
  - Registry: You have to enter your profile ID here. You can find the profile ID in the registry under the following path: HKEY_LOCAL_MACHINE\SOFTWARE\PTM EDV-Systeme\Profiles
  - Dialog: Opens the default CRM connection dialog.

Only if the connectionvariant is "params" you will need the following additional parameters.

- **Server**: dyn365srv2:555
  This is the Dynamics 365 server on which you want to perform the actions.
- **Connectiontype**: standard
  Here you have the possibility to choose between standard, online and hosted
- **Organization**: ptmedvsystemegmbh
  Enter the name of the organization you want to use.
- **Action**: export
  You can choose between export, import and transfer.
- **Exportdirectory**: c:\users\administrator\desktop\myTemplates
  Please specify here the directory which serves as destination for your exported templates.
- **Username**: mpoelzl@ptm-edv
  This is the username you use to login to Dynamics 365.
- **Password**: xxx
  Please enter your secret password here.

The example above shows the syntax for the export functionality. The import functionality shares the same syntax with the export functionality, except that the parameters **zip and zippath** are removed, the parameter **exportdirectory** is replaced with **templatefolder.**

In the templatefolder parameter, you need to specify the folder which contains your templates. And there also is a new parameter called mbresgult.

Mbresult: Valid options are Yes or No.
This indicates that all templates should be overwritten if they are already existing.

6 How to filter linked entities during the merge process

You can filter the linked entities of a 1: N and a N: N relationship during the merge process based on their IDs. This works in combination with DocumentsCorePack and DocumentsCorePack ServerBased but only with .*docx*-templates.

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

NAME

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

- **Structure:**
  AMPreFilter|<<ID of the user who should use the filter>>|<<the logical name of the starting entity of the template>>|<<ID of the record (of template starting entity) for which the filter should be used>>|<<logical name of the linked entity which should be filtered>>|

- **Example:**
  AMPreFilter|{DC9B80F8-C781-46D8-9FD6-A3B610836975}|account|{7b069E5412-84F6-E111-977B-00155DC8AE09}|contact|

VALUE

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

- **Structure:**

```
<filter>
   <entity><<logical name of the linked entity which should be filtered>></entity>
   <values>
      <value><<ID of linked record which should be shown>></value>
      <value><<ID of linked record which should be shown>></value>
      .......
   </values>
</filter>
```

- **Example:**

```
<filter>
   <entity>contact</entity>
   <values>
      <value>{12E5214A-88BF-E111-A7C1-00155DC8AE09}</value>
      <value>{12E5214A-88BF-E111-A7C1-00155DC8AE09}</value>
   </values>
</filter>
```

The IDs must be in upper case and must contain brackets.

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

Example:

Here you can see an account named "MSCRM-ADDONS.com". It has several related contacts.

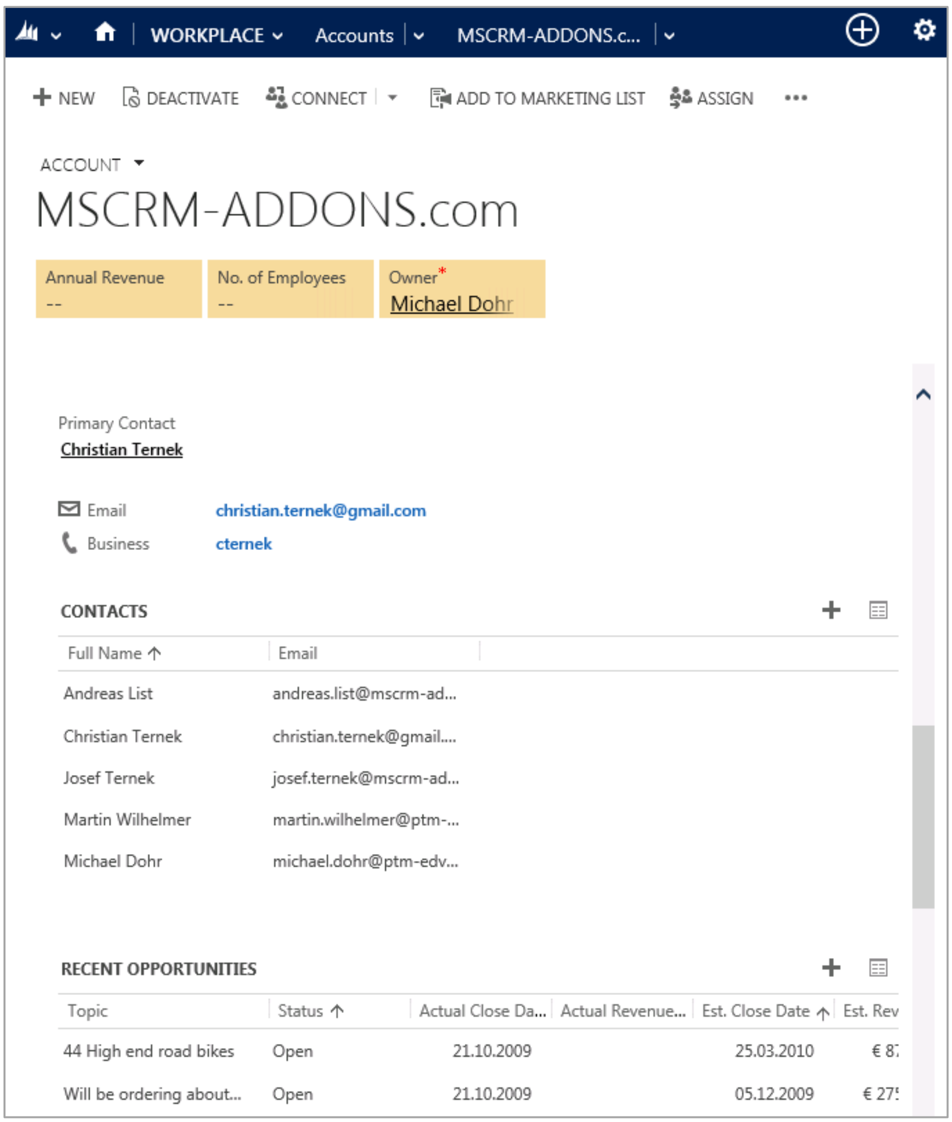


Figure 70: Mscrm-addons.com account with related contacts

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

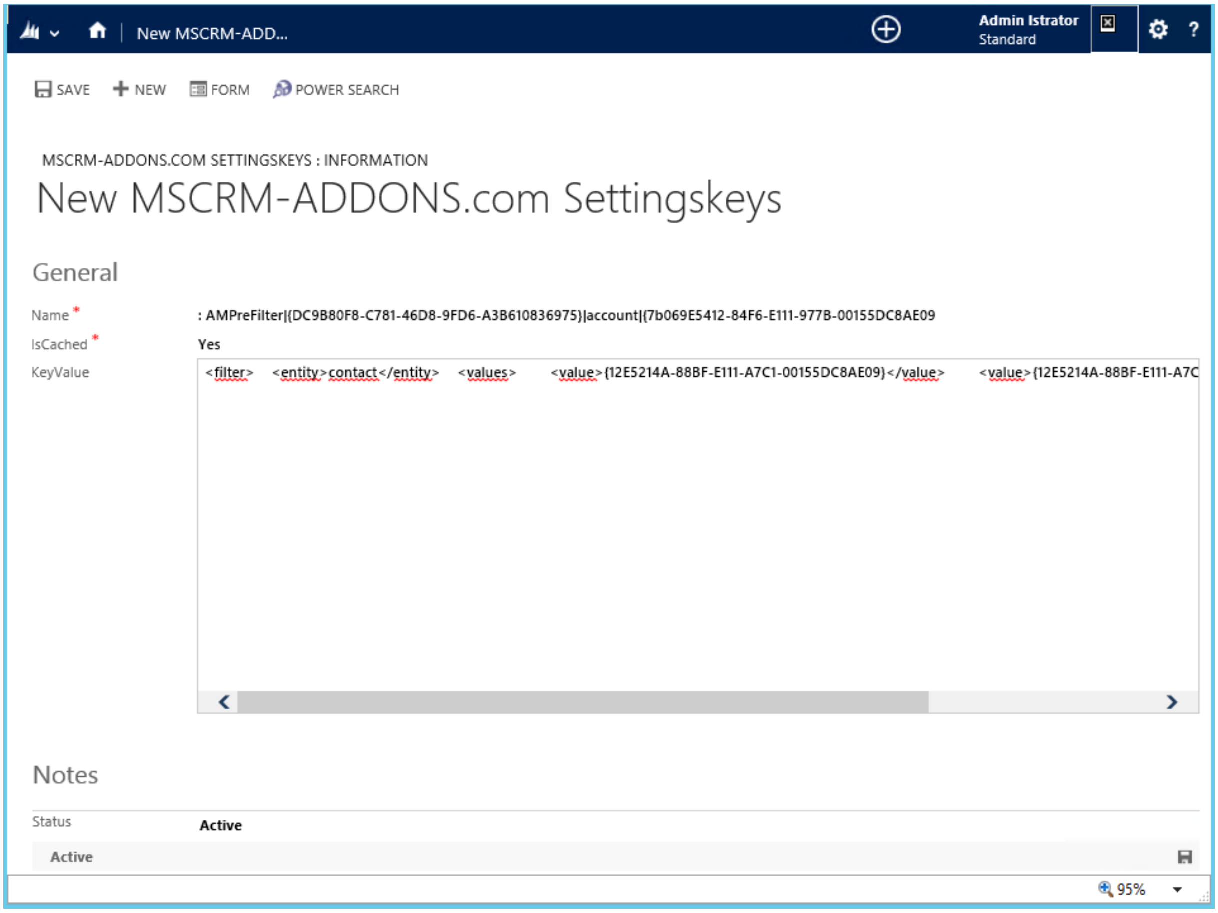


Figure 71: Mscrm-addons.com account: How to set a filter

7 Tutorials (How To's)

This section provides you with all available 'How-To's' that are described in this document.

7.1 How to merge a document (single merge)

This step-by-step tutorial supports you when it comes to merge a document as single merge.

7.1.1 Select your preferred template in the DocumentsCorePack dialog

As soon as you have opened the DocumentsCorePack Dialog, you can select your preferred template there. Learn more about how to open the dialog in CHAPTER 3.1.1 HOW TO OPEN THE DOCUMENTSCOREPACK DIALOG USING SINGLE MERGE ON PAGE 11. In our example, we want to create a contemporary letter. So, we select the corresponding field (1) and click on the ***[Next]***-button in the right lower corner. Should you have a huge number of templates, you could also search for them (2) and define categories (3). The categories can be structured, customized, and set by yourself.

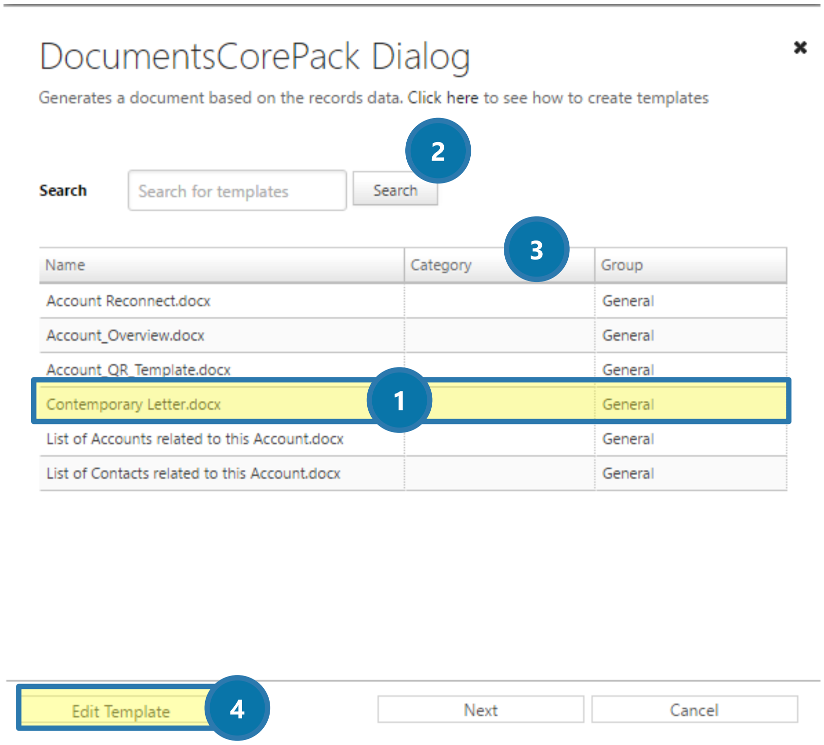


Figure 72: DocumentsCorePack dialog – select template

With a click on the ***[Edit Template]***-button (4) in the left lower corner, you can edit your template like you probably already know it from the good old Microsoft Word form letters. Say, if you wanted to add some additional text to your template before you merge it, it is this button you may want to click on.

7.1.2 Customize your template

The dialog that opens now, provides you with the possibility to define how to proceed with your future template (e.g., how to attach/send/print/save/… it.) Please find more information on the dialog in CHAPTER 3.2 DOCUMENTSCOREPACK DIALOG OPTIONS ON PAGE 13. Our letter should be printed and saved to SharePoint, but you can customize your template as you wish. Click on the ***[Next]***-button in order to proceed.

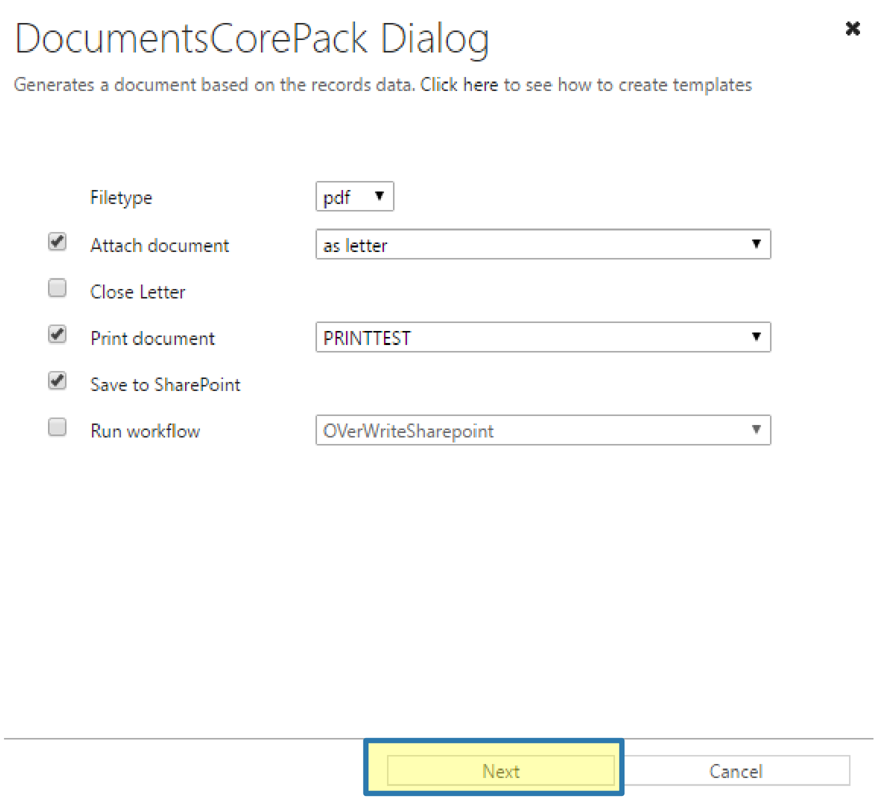


Figure 73: DocumentsCorePack dialog – customize template

7.1.3 Finish the process

The next dialog provides you with an overview to your merged document. You can review it once more and edit it in Word or Word online if necessary.

Furthermore, the dialog provides you with an overview of the next steps. Click on the ***[Finish]***-button to finish the merge.

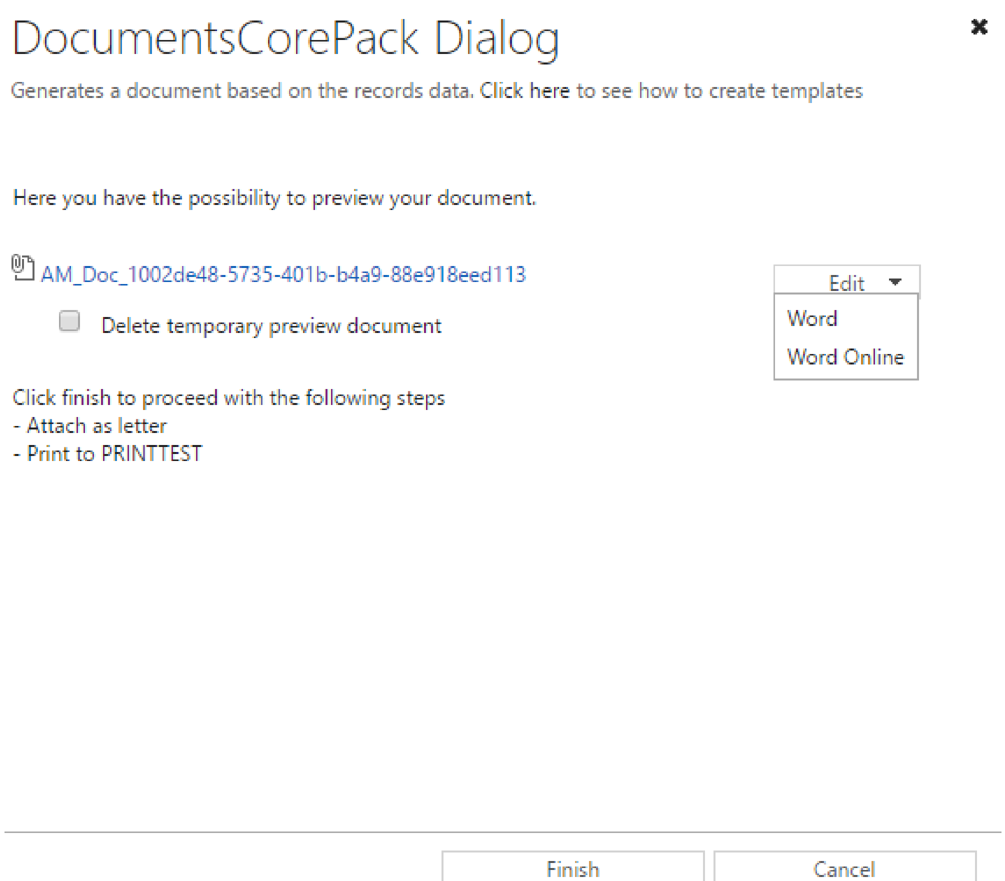


Figure 74: DocumentsCorePack dialog – finish template

That's it! Start to create your own single merged documents and try out all the possible settings of DocumentsCorePack dialog!

7.2 How to merge a document (bulk merge)

This step-by-step tutorial supports you when it comes to merge a document as bulk merge.

7.2.1 Select your preferred template in the DocumentsCorePack dialog

As soon as you have opened the DocumentsCorePack Dialog, you can select your preferred template there. Learn more about how to open the dialog in chapter 3.1.2 How to open the DocumentsCorePack dialog using bulk merge on page 12. In our example, we want to create a contemporary letter. So, we select the corresponding field (1) and click on the ***[Next]***-button in the right lower corner. Should you have a huge number of templates, you could also search for them (2) and define categories (3). The categories can be structured, customized and set by yourself.

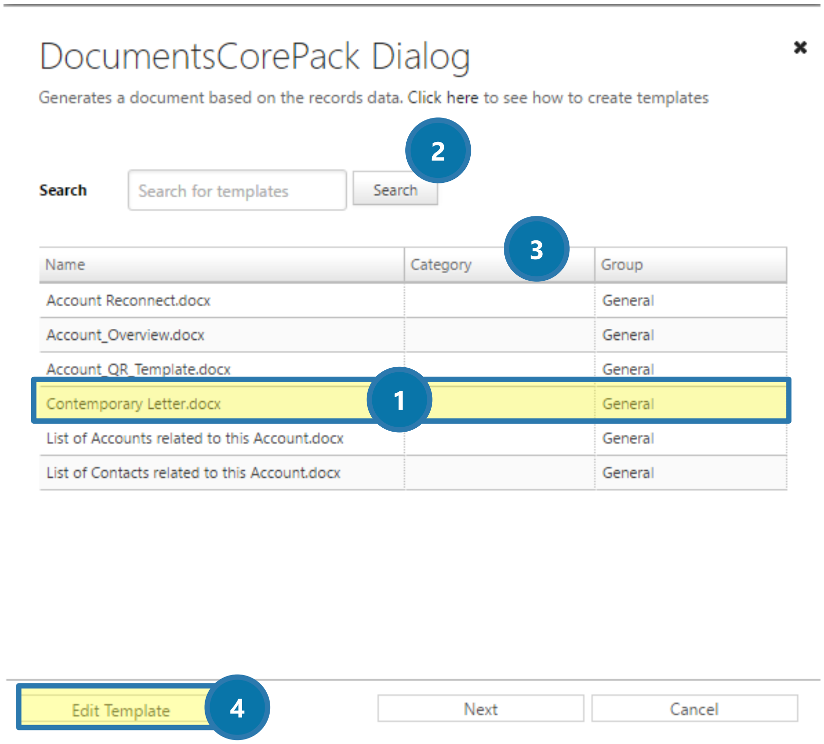


Figure 75: DocumentsCorePack dialog – select template

With a click on the ***[Edit Template]***-button (4) in the left lower corner, you can edit your template like you probably already know it from the good old Microsoft Word form letters. Say, if you wanted to add some additional text to your template before you merge it, it is this button you may want to click on.

7.2.2 Decide if you want to create a single document or to attach your document

The dialog that opens now enables you to decide, if you want to create a single document or if you want to attach your document.

7.2.2.1 How to create a single document (bulk merge)

If you check the checkbox next to *Create single document*, you will be creating a single document. You can print your document here or close the letter. Click on the ***[Start Batch]***-button to finish the process.

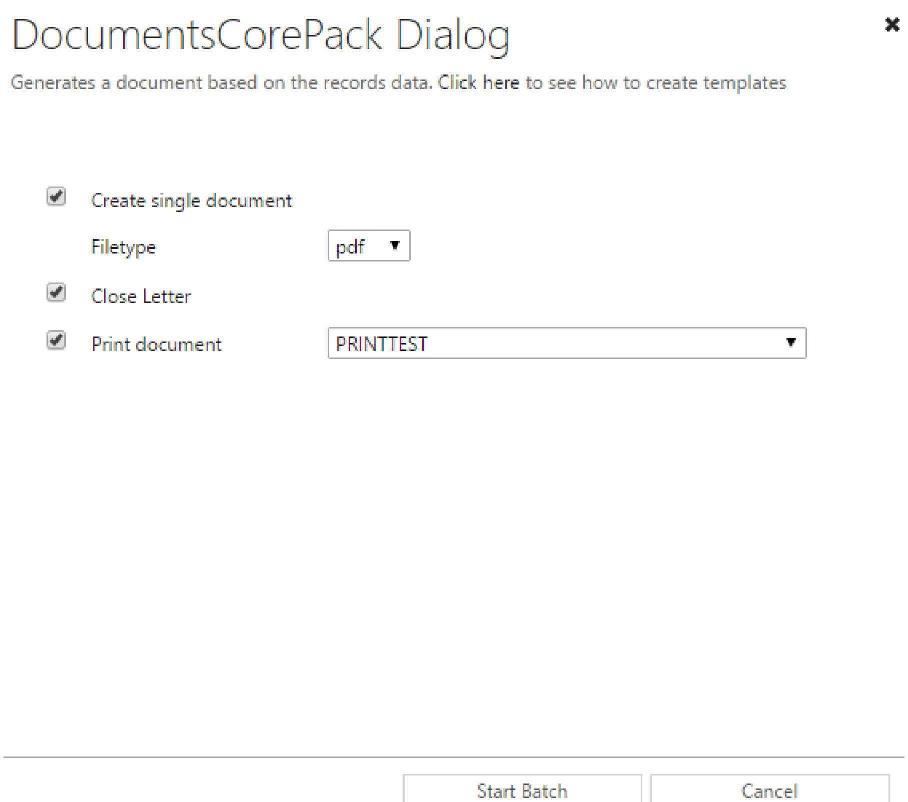


Figure 76: DocumentsCorePack dialog – customize template (create single document)

When using this option, you can only select between .docx and .pdf templates.

Once you have finished the process, you will be provided with an overview on the next steps and can also edit your template. That's it!

7.2.2.2 How to attach a document (bulk merge)

If you leave the checkbox next to *Create single document* unchecked, you will attach your document. You can print your document here or close the letter, save it to SharePoint or run a certain workflow.

Please find more information on the dialog in CHAPTER 3.2 DOCUMENTSCOREPACK DIALOG OPTIONS ON PAGE 13. Our letter should be printed and saved to SharePoint, but you can customize your template as you wish. Click on the ***[Start Batch]***-button to finish the process.

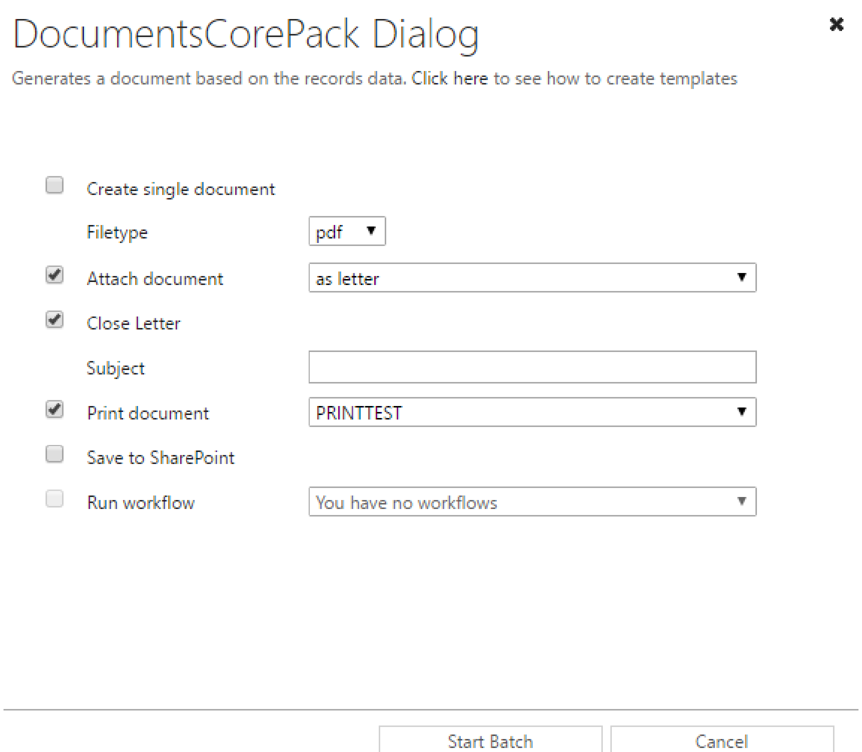


Figure 77: DocumentsCorePack dialog – customize template (attach a document – bulk merge)

The next dialog provides you with an overview of all the documents that were created during the bulk merge. With a click on the ***[Preview]***-button you can have a look at your templates.

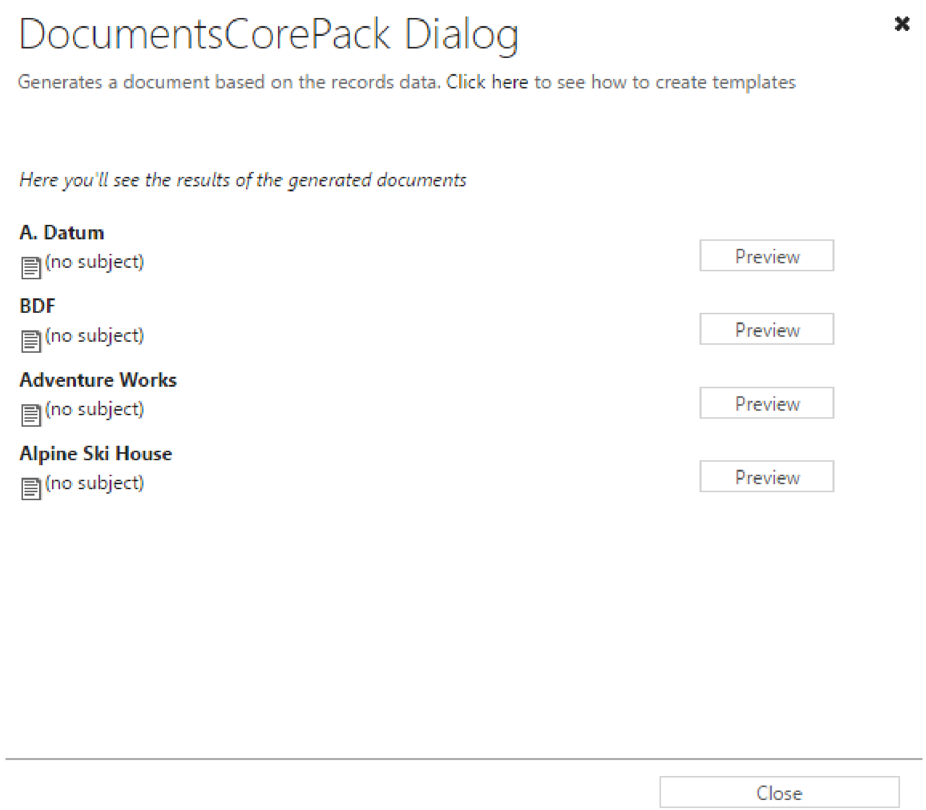


Figure 78: DocumentsCorePack dialog – customize template (attach a document – bulk merge)

That's it! Start to create your own bulked merged documents and try out all the possible settings of DocumentsCorePack dialog!

7.3 How to create a Command

Please find all How-Tos related to Commands and the **[Save Config]**-button in the One-Click actions documentation on our website.

7.4 How to create a SharePoint location manually (with examples)

In the course of the following tutorial, you will learn how to create a SharePoint location manually.

7.4.1 How to create SharePoint locations manually

Whenever a new account in Microsoft Dynamics CRM is created, all appropriate documents (e.g. quotes, invoices, etc.) will be saved in the entity *Documents* in MS CRM.
As you can see in the screenshot below, the CRM Save location "Documents" can be accessed with the drop-down-button next to the current company (1) in the main navigation area at the top. Of course, you could also use our add-on SmartBar, (2) which enables a simple navigation between all related CRM records and entities.

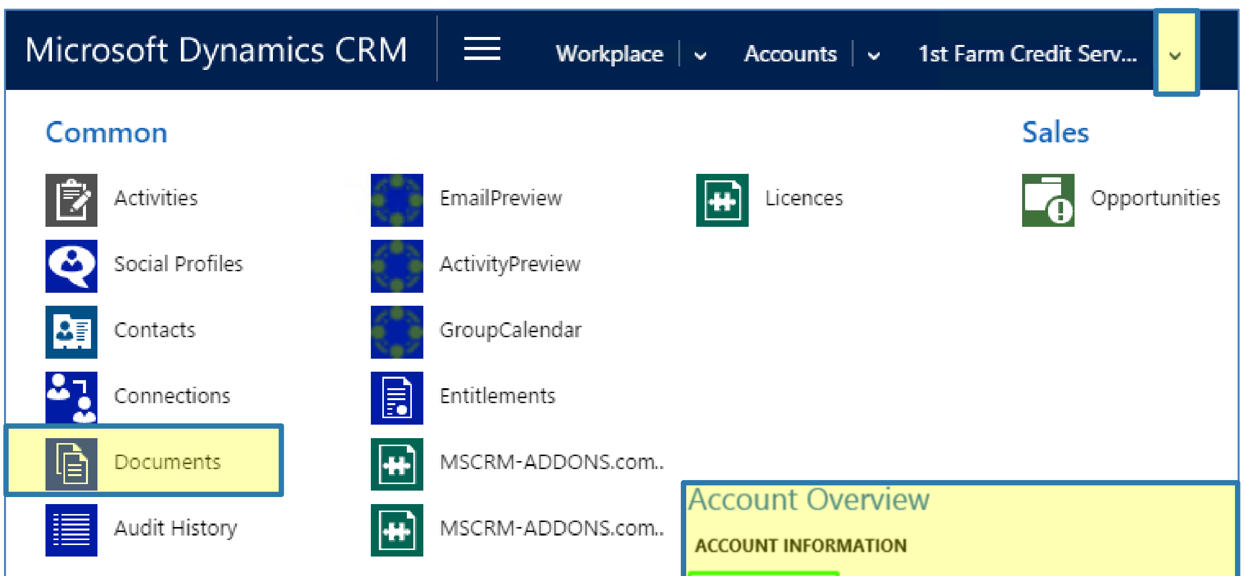


Figure 79: Access documents via CRM

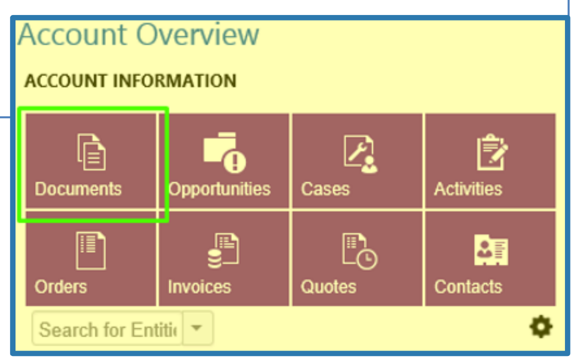


Figure 80: Access documents via SmartBar

However, when you click on *Documents*, the following message box appears. This message box indicates, that a SharePoint location will be created manually when you click on the ***[OK]***-button. Depending on your settings, the SharePoint location will look like one of the examples on the next page.

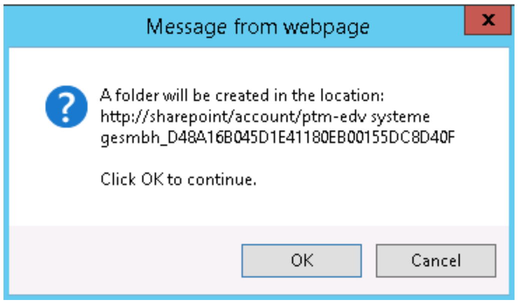


Figure 81: Access documents via SmartBar

7.4.2 Examples of SharePoint locations

As you can see in the below screenshot, the standard SharePoint location window is empty and does not contain any folder(s) or subfolder(s).

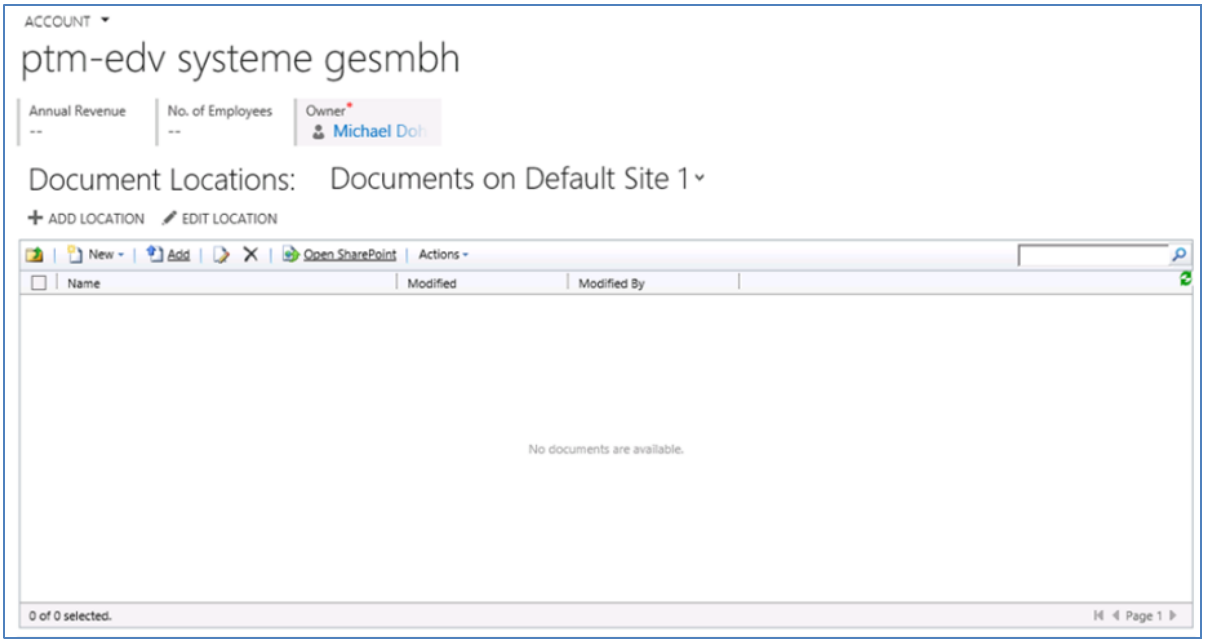


Figure 82: Standard SharePoint location

Once documents are saved, it could look like one of the examples below.

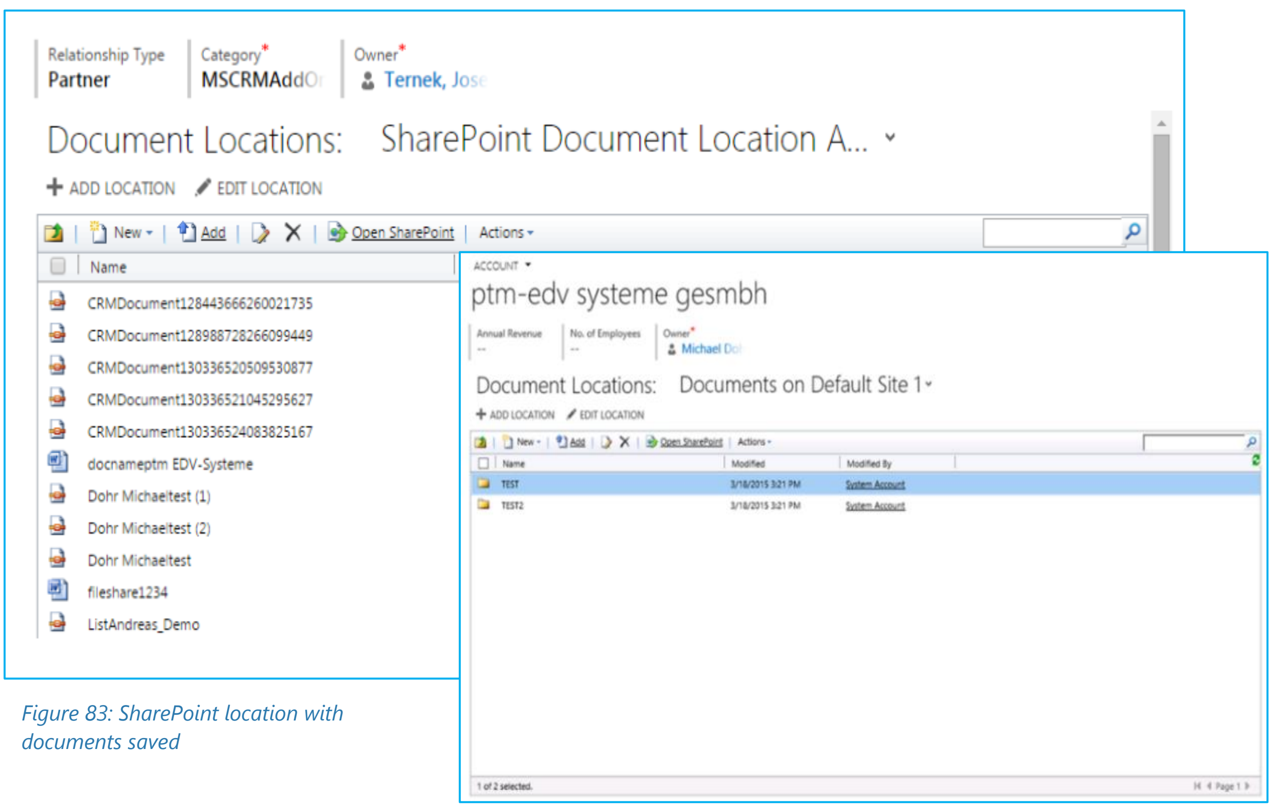


Figure 83: SharePoint location with documents saved

7.5 How to apply SharePoint, folder(s), subfolder(s)… automatically when an account is set up

It is possible to create various folders and subfolders, where the appropriate document should be saved (e.g., Quotes, Invoices …) This can be done with a single workflow to save precious time. Our example shows how users can define if the creation of

a SharePoint location, folder(s) and/or subfolder(s)

is automatically triggered when a new account is set up.

7.5.1 Create a new process for CreateSharePointFolder

If you have not created a new process yet, learn how to do so in CHAPTER 3.4 STEP 2: CREATE A NEW PROCESS ON PAGE 24.

During the following step-by-step description, we want you to learn how to create a dialog. For our example, we thought of the following scenario:

After the user has selected or opened a quote, the user should have the possibility to select a template for the merge process. Furthermore, the user should be able to define the file extension of the generated document and whether the document should be attached to an email or letter or not. If the user selects the *attachtoletter* function, he should have the possibility to define whether he wants to print the letter or not. If the user chooses *attachtoemail*, the mail should be sent automatically.

This example is built on Microsoft Dynamics CRM On Premise. It does not apply to the online version.

We put this into practice by using the DCP SB functionality inside a Dynamics 365 dialog.

Within CRM, we open a new process. Please look at CHAPTER 3.4 STEP 2: CREATE A NEW PROCESS ON PAGE 24 if you have not opened a new process before.

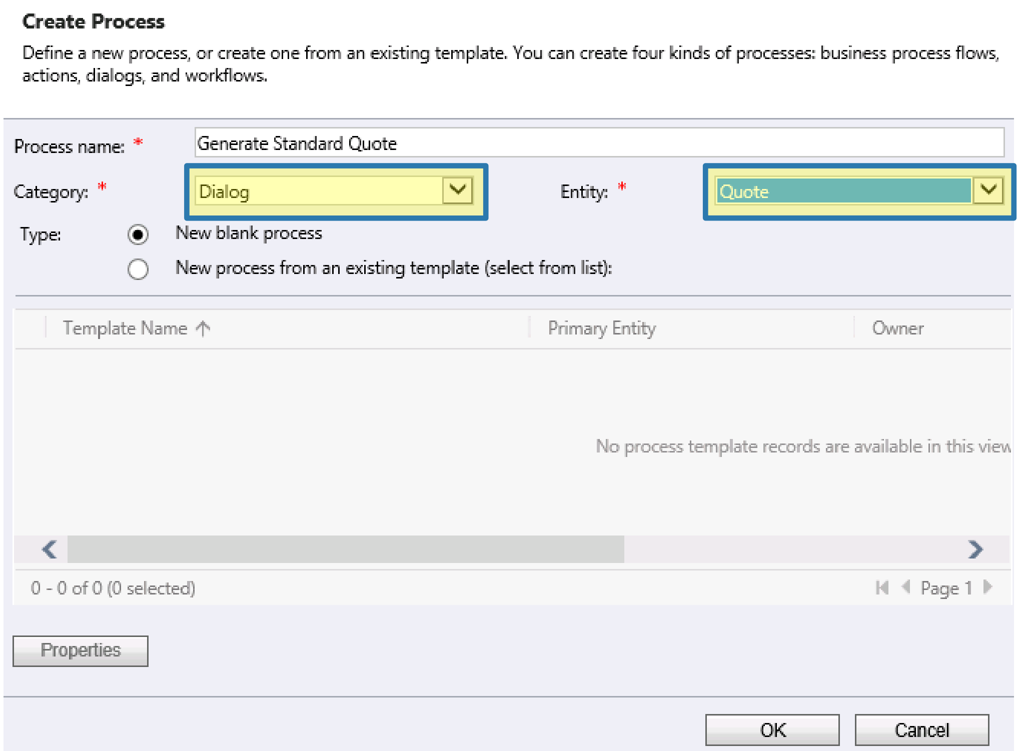


Figure 84: New process – webpage dialog

In the popped-up window we type in a name of the process (*Generate Standard Quote*), select *Quote* as entity and choose the *Dialog* category. Press the ***[Ok]***-button to continue.

The following window will open:

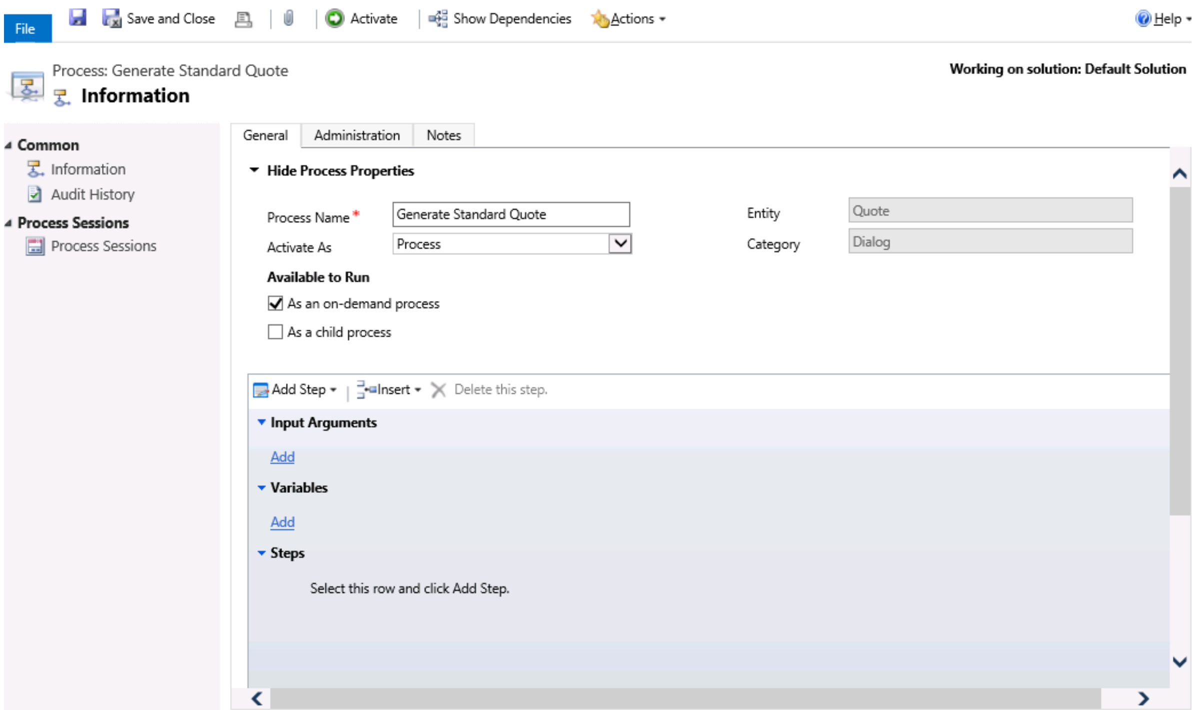


Figure 85: New process - information

7.5.2 Part 1: User Interaction

First, the user should be able to select a template from a pick list. Therefore, we add the "Query CRM Data"-step to our dialog.

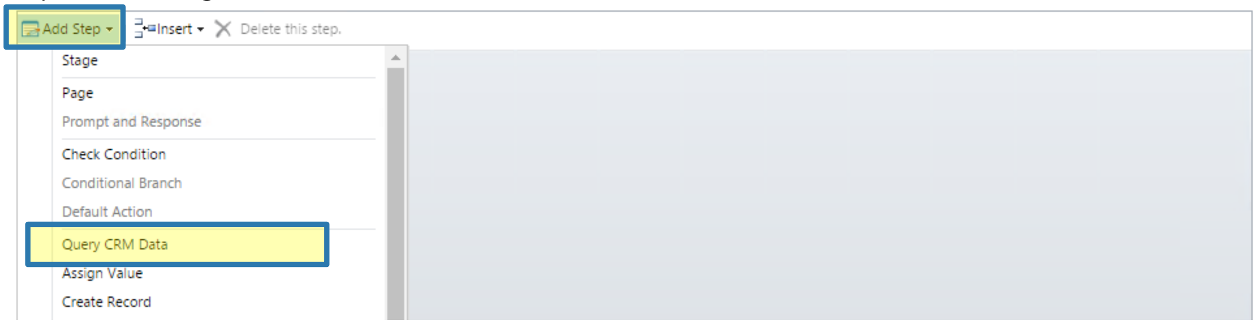


Figure 86 Add step – query CRM data

Next, we call the step *Retrieve Standard Templates* and hit the ***[Set Properties]***-button.

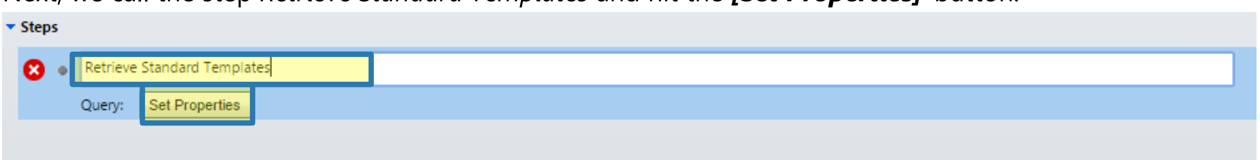


Figure 87: Name the step and hit the [Set properties]-button

We use the popped up window to define a query. It will retrieve all templates of the type *quote* starting with *Standard_Quote_" of the "MSCRM-ADDONS.com DocumentsCorePack Templates*-entity. Then, we hit the ***[Save and Close]***-button to proceed.

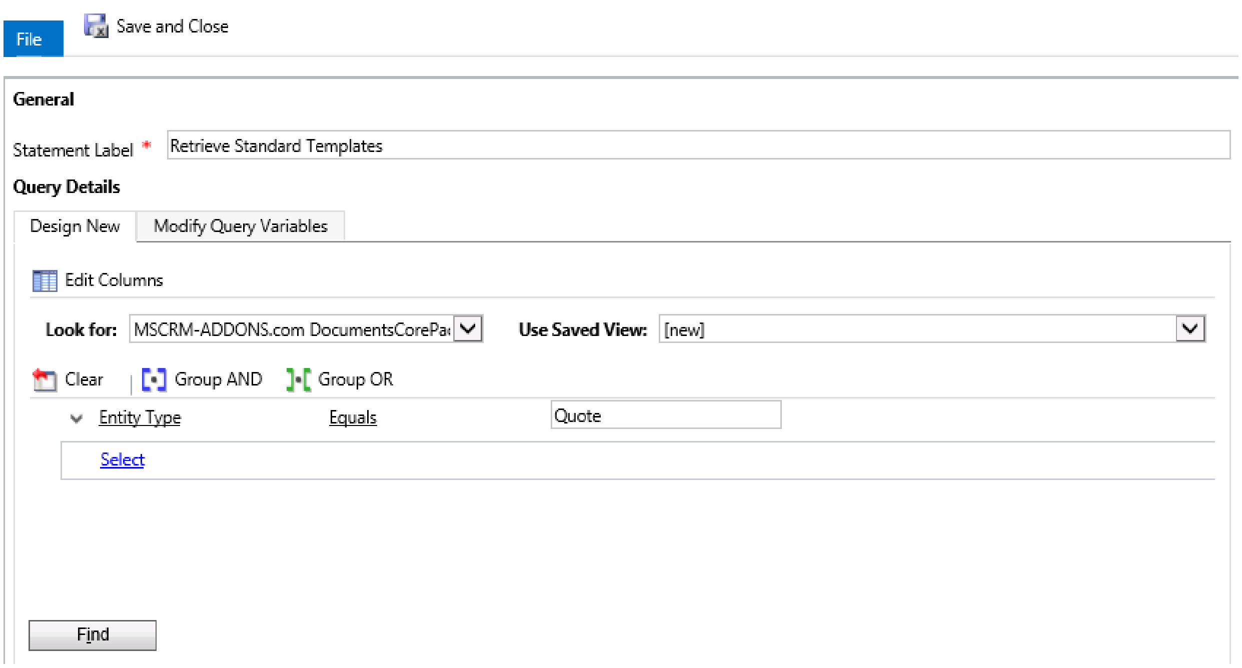


Figure 88: Retrieve Standard Templates query

Next, we add a new step (*Page*) to the dialog and name it *Quote Templates*.

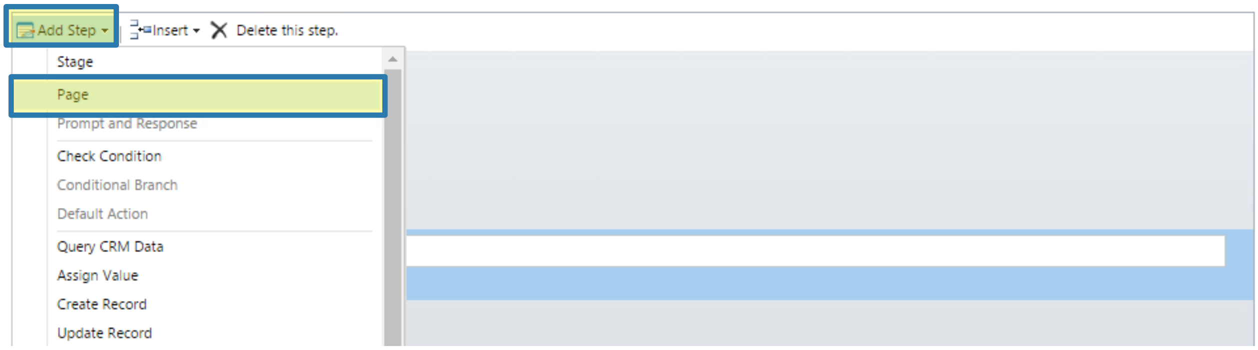


Figure 89: Add new step: Page

Then, we add another step (*Prompt and Response*) which we name *Which Template do you want?*

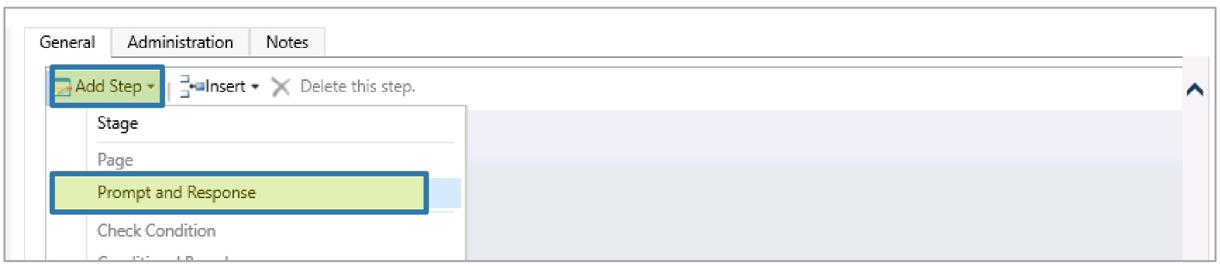


Figure 90: Add new step: Prompt and Response

Now your dialog should look like the below figure. To define the properties of the Prompt and Response step, we now click on the ***[Set properties]***-button.

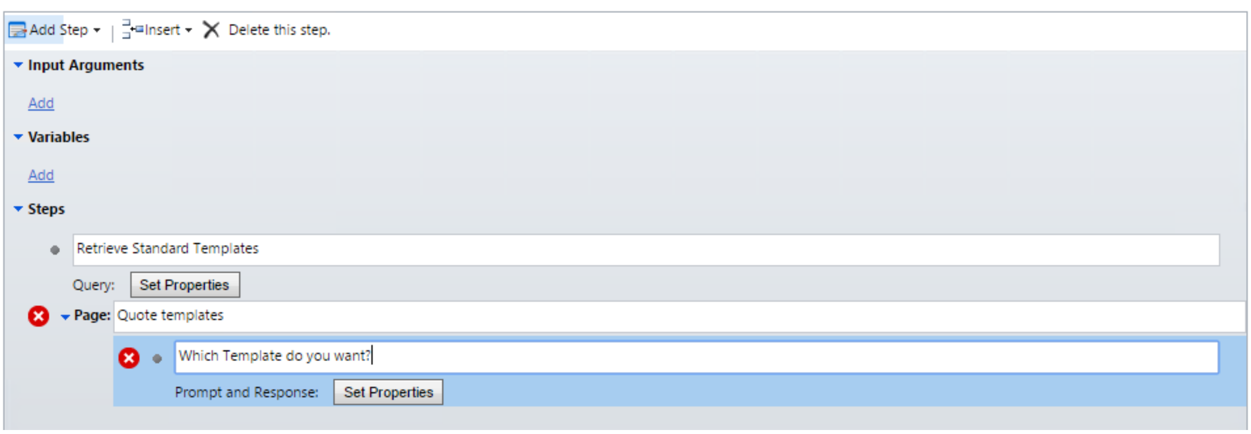


Figure 91: Prompt and Response: Which Template do you want?

The properties of the *Prompt and Response* – step open. Here, we can define *Please select a template* as *Prompt Text* (1) and set the *Response Type* to *Option Set (picklist)* (2). We check *Query CRM data* (3), then select *Retrieve Standard Templates* (4) and check the *Name*-column (5). When finished, we hit the ***[Save and Close]***-button (6)to continue.

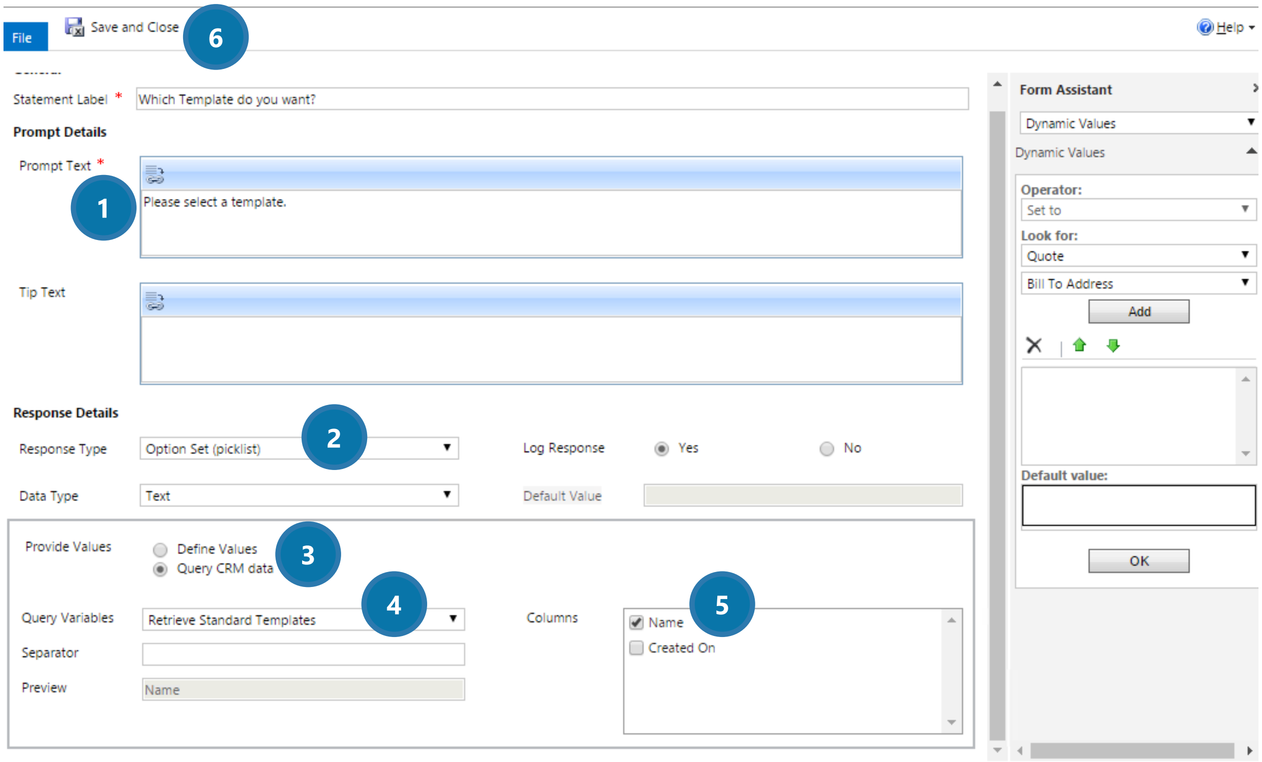


Figure 92: Prompt and Response properties

Next, we want to give the user the possibility to select the file extension of the generated document. So we add a further *Page* to our dialog and name it *File Types*. Same as above, we add a *Prompt and Response*-step to it. We name it “What file type do you want?” (See next screenshot)

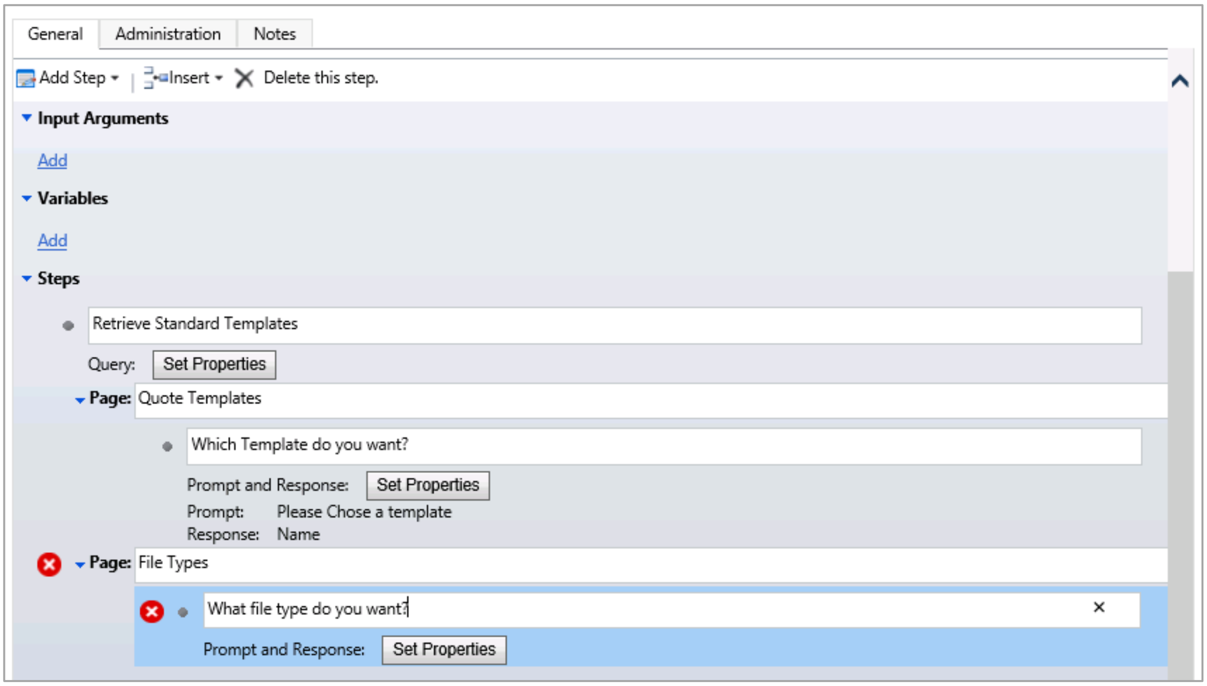


Figure 93: Add Page: File type

We again click on the ***[Set Properties]***-button to set them up.

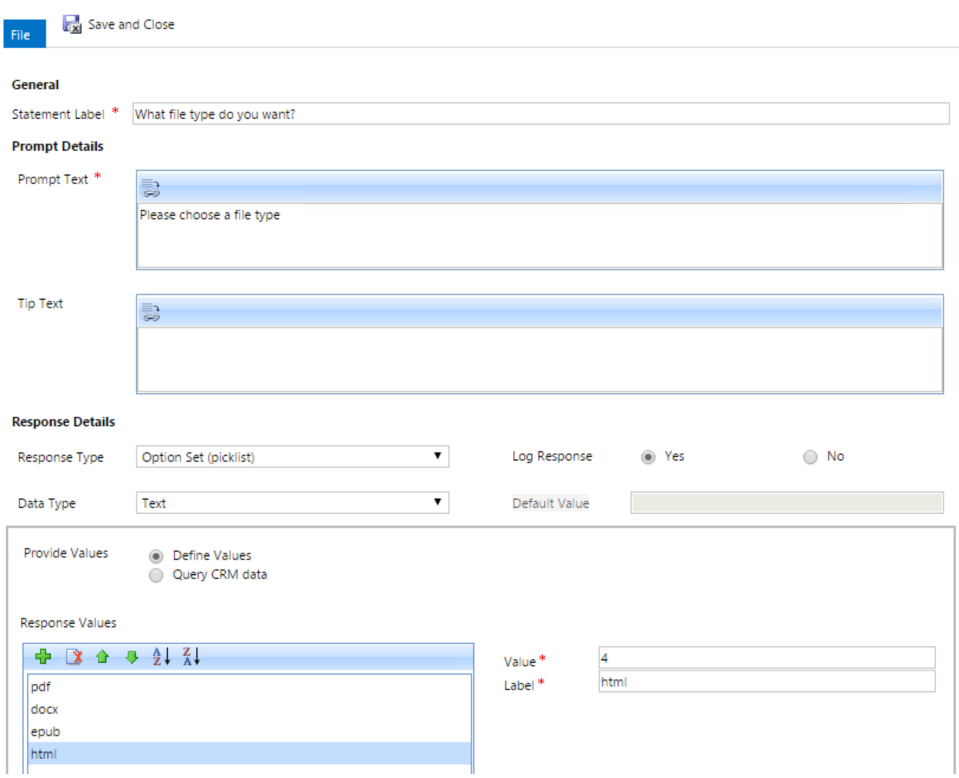


Figure 94: Add Page: File type

The *Prompt Text* should be *Please choose a file type*. As *Response Type* we select *Option Set (picklist)* again. But in this case, we check *Define Value* and add *docx, pdf, epub and html* as *Response Values*. This can be achieved by entering a value and a label into the fields on the right side and then clicking on the green cross. We click on the ***[Save and Close]***-button in order to proceed.

At last, we want to provide the user with the possibility to select if he wants to attach the generated document to an email, to a letter or to a letter and print it out.

So we add a further *Page* to the dialog and name it *Actions*. Again, we add a *Prompt and Response*-step as well. We name it *Actions*. Next, we press the ***[Set Properties]***-button to set them up.

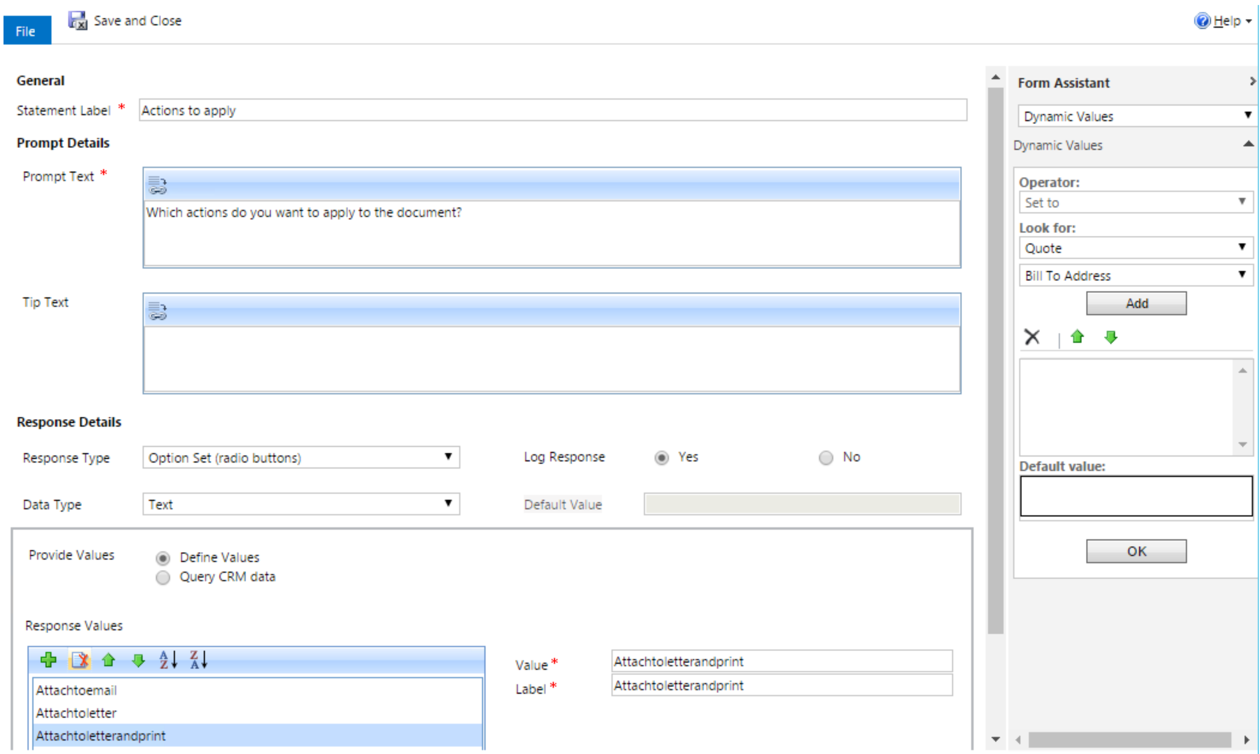


Figure 95: Actions to apply – Step properties

We define *Which actions do you want to apply to the document?* as *Prompt Text* and select the *Response Type Options Set (picklist)*. Then we check *Define Values* and add the following items by hitting the green cross to the list:

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

We hit the ***[Save and Close]***-button to proceed.

7.5.3 Part 2: DocumentsCorePack ServerBased steps

Next, we add a *Check Condition*-step and name it *Print or not*. We use it to decide if the document should only be generated or if it should be printed as well. To define it, we click on *<condition> (click to configure)*.

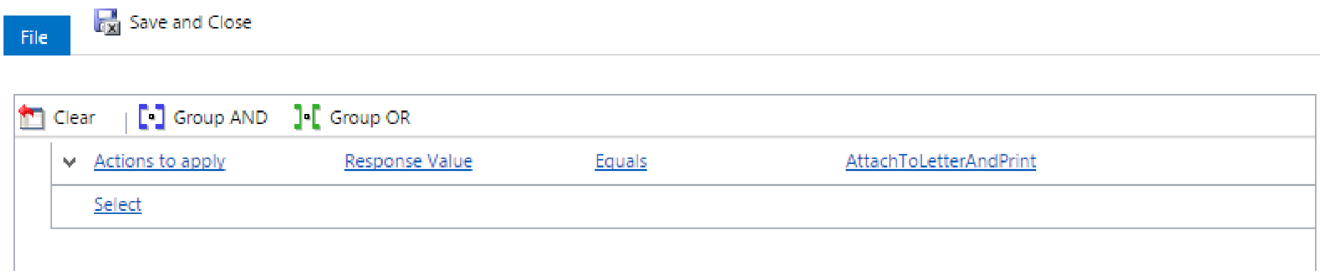


Figure 96: Check condition step: Print or not

We select the previously created *Actions to apply*, *Response Value* and define that it has to *Equals AttachToLetterAndPrint*.

We complete the condition by clicking on the ***[Save and Close]***-button in the left upper corner.

7.5.3.1 Part 2.1: Generate and print

If this condition is true, a document should be generated, printed, and attached to a letter. To fulfill this condition, we add the *CreateDocument*-step of the DocumentsCorePack ServerBased functionalities to it underneath. We name it *Generate and print document* and press the ***[Set Properties]***-button.

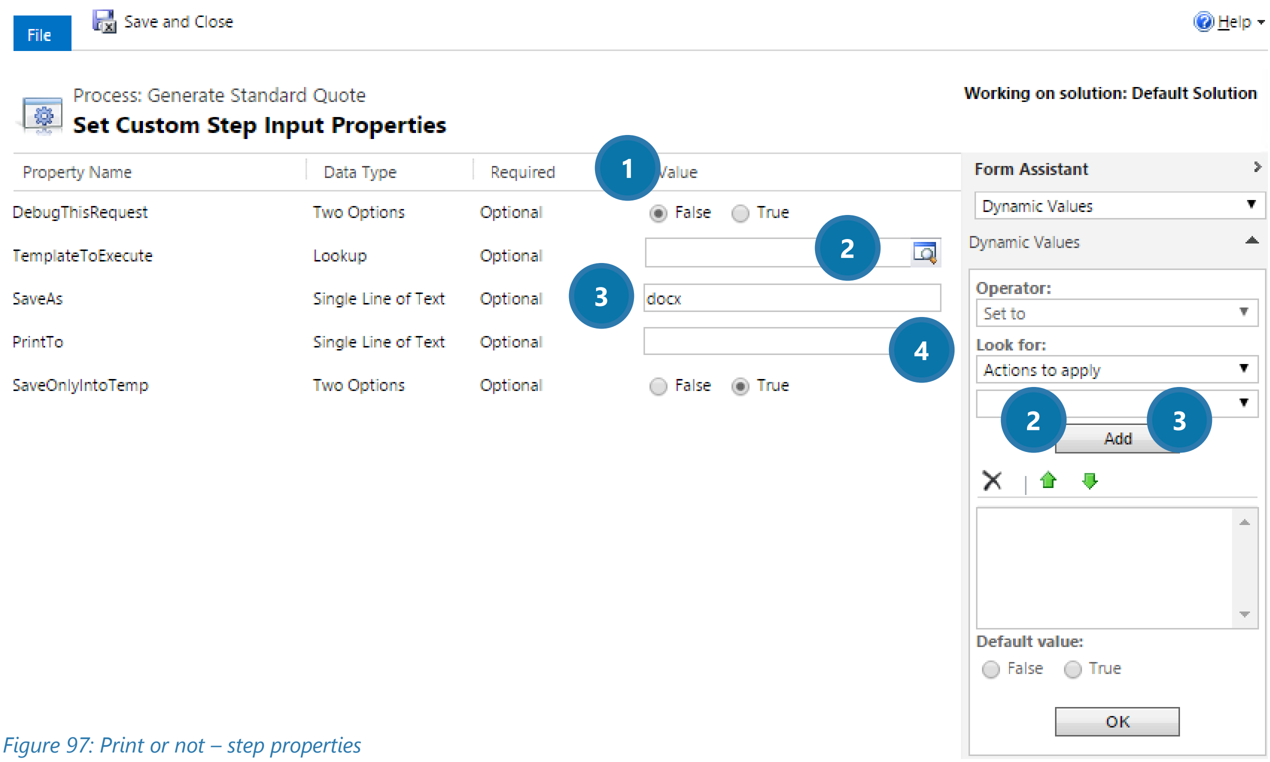


Figure 97: Print or not – step properties

This window allows us to define the following properties:

① DEBUGTHISREQUEST We set this property to "False" because we do not need any log files.

② TEMPLATETOEXECUTE Here we have to refer to the template previously selected by the user. To do so, we put the cursor into the field and use the *Form Assistant* on the right side of the window. We select *the Actions to apply* and *Response label* as shown in the above figure. Then we select "DocumentsCorePack Template" hit [Add] and [Ok].

③ SAVEAS Here we refer to the selected file type. This works the same way as for the above property, except that we select *What file type do you want?* and *Response Value* in the form assistant.

④ PRINTTO We are using this property to define the path of a network printer.

⑤ SAVEONLYINTOTEMP We set this property to *True*.

Click on the ***[Save and Close]***-button in order to proceed.

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

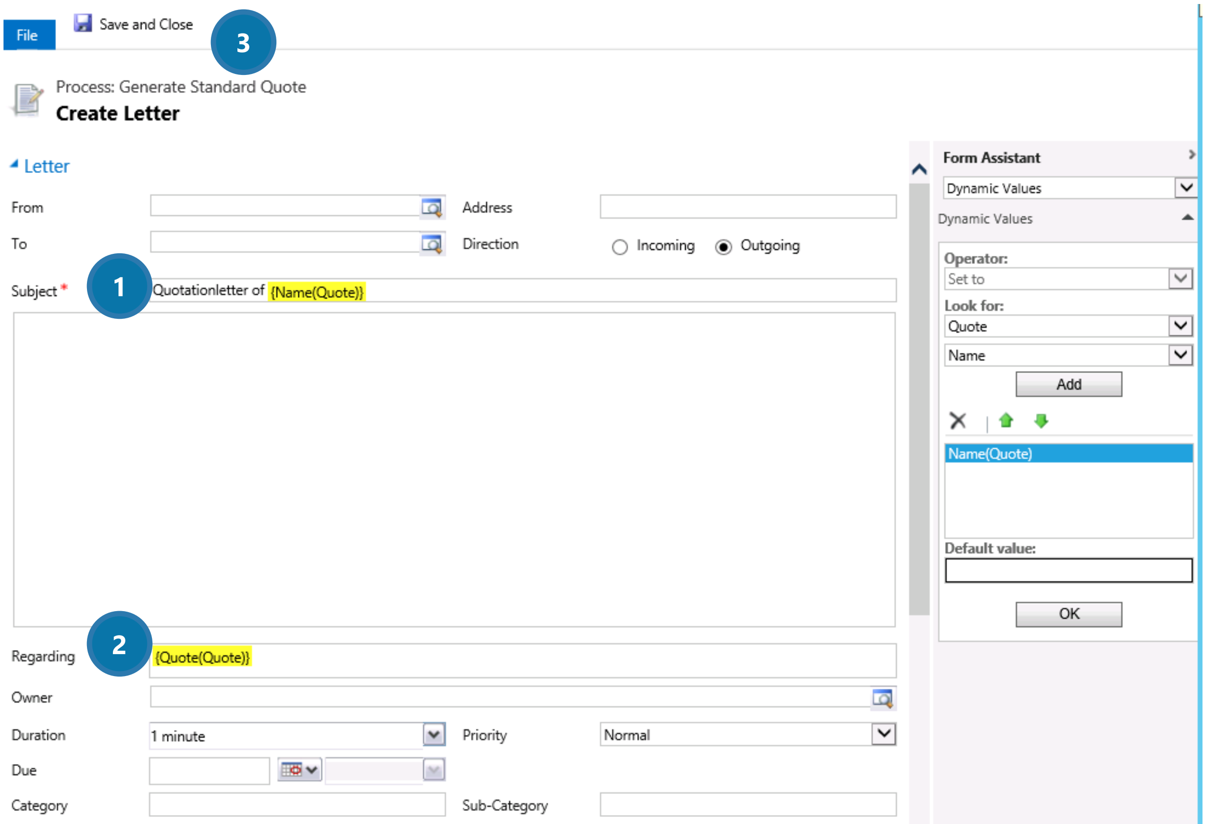


Figure 98: Create letter1 properties

❶ We define its *Subject* using the *Form Assistant*.

❷ The *Regarding*-field is set automatically.

❸ We hit the ***[Save and Close]***-button to continue.

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

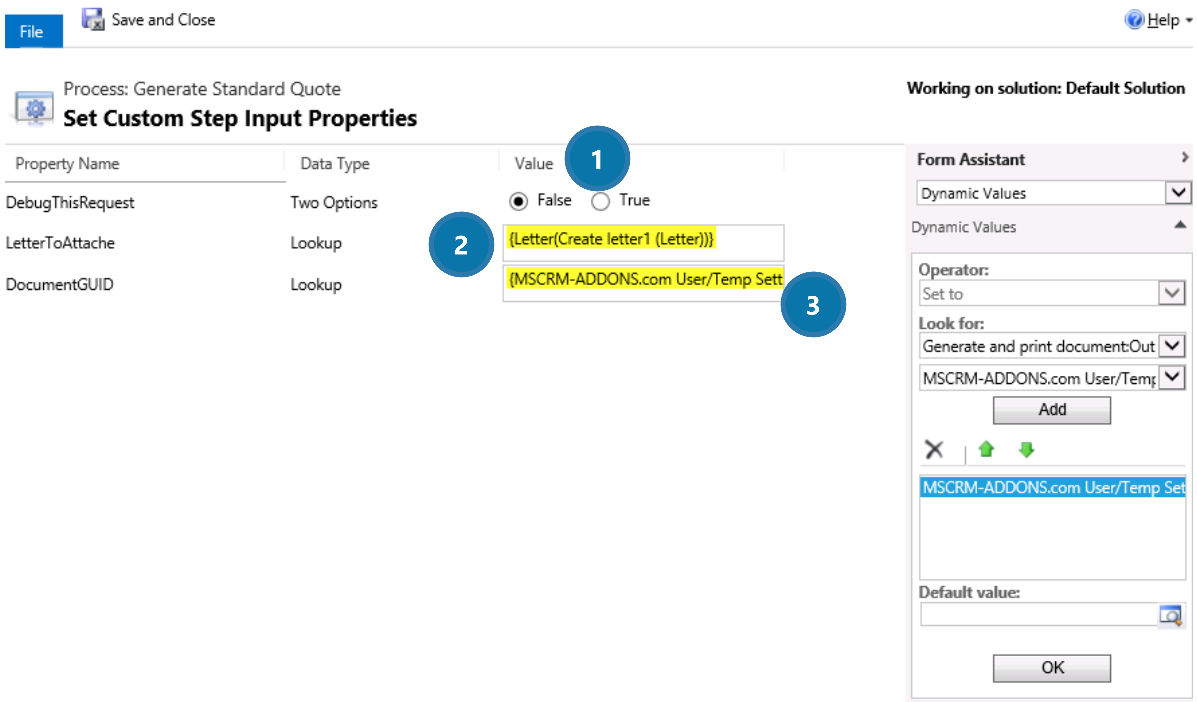


Figure 99: Create letter1 properties

❶ DEBUGTHISREQUEST We set this property to *False* because we do not need any log files.

❷ LETTERTOATTACH We refer to the before created letter using the *Form Assistant* (Select: *Create letter1 (Letter)* and *Letter*)

❸ DOCUMENTGUID Here we have to link to the generated document. We use the *Form Assistant* again and select *Generate and print document: OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings)* and *MSCRM-ADDONS.com User/Temp Settings*.

Click on the ***[Save and Close]***-button in order to proceed.

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

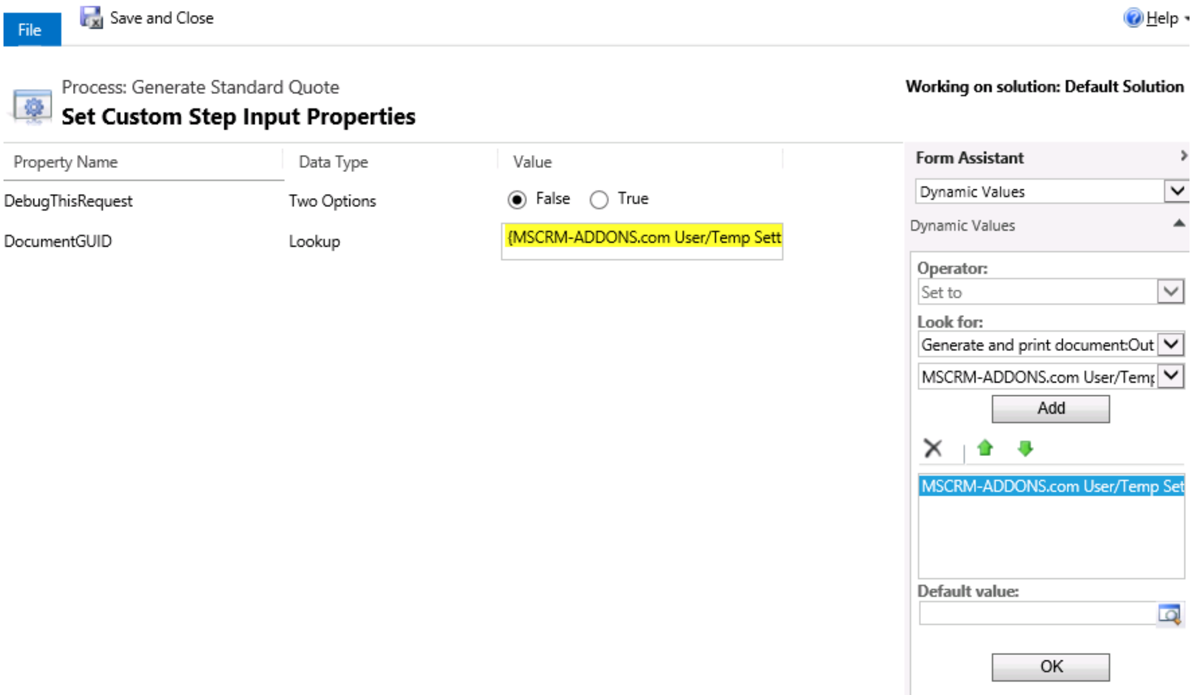


Figure 100: Create letter1 properties

We use the "DocumentGUID"-property to refer to the generated document. To do so, we select *Generate and print document: OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings* and *MSCRM-ADDONS.com User/Temp Settings*.

7.5.3.2 Part 2.2: Generate only

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

First, we have to add the *Default Action*–step (else branch) to create the if condition.

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

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

This can be done by adding a new *Check Condition*-step to the dialog. We name it *Email or Letter* and define it as *Actions to apply* > *Response Value* > *Equals* > *AttachToEmail.*

If the value of *Actions to apply* is *AttachToEmail* the condition is true, otherwise, it is false.

7.5.3.3 Part 2.3: Attach to Email

In the true branch of this condition, we create an email by using the *Create Record*-step. We type in the name *Create Email* and define it as shown in the below figure:

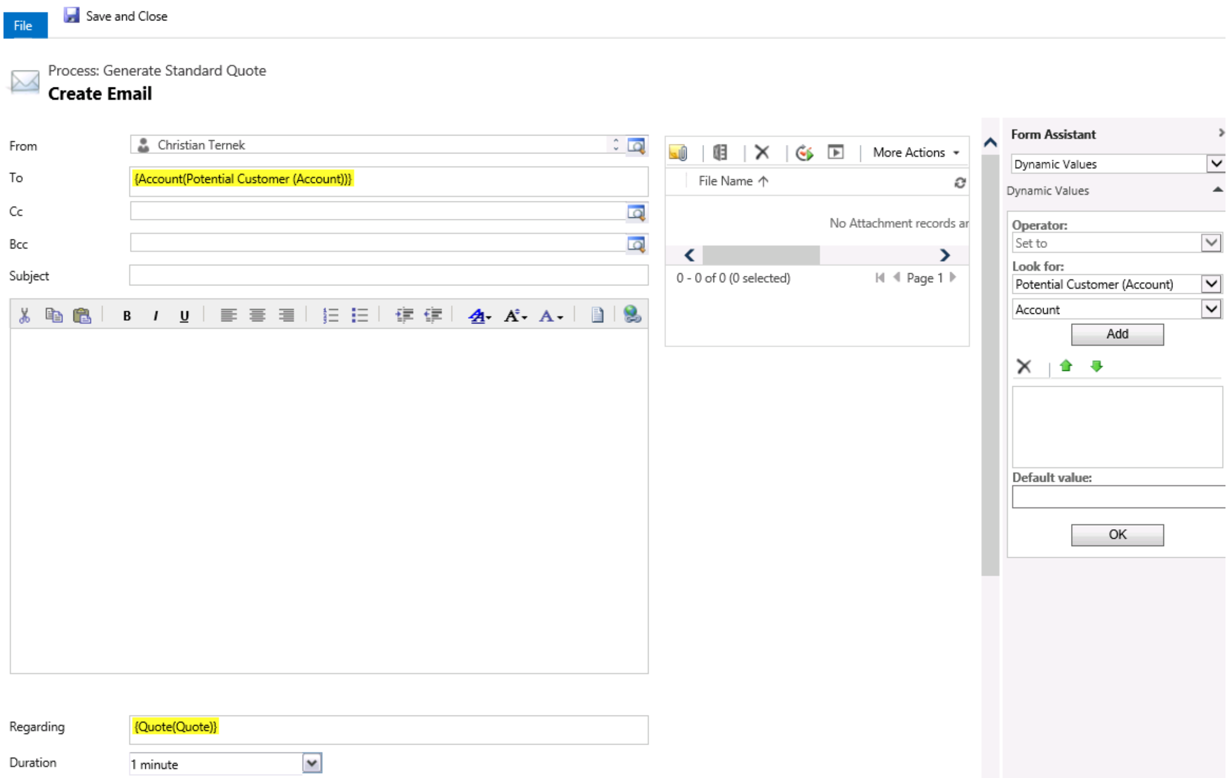


Figure 101: Create email properties

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

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

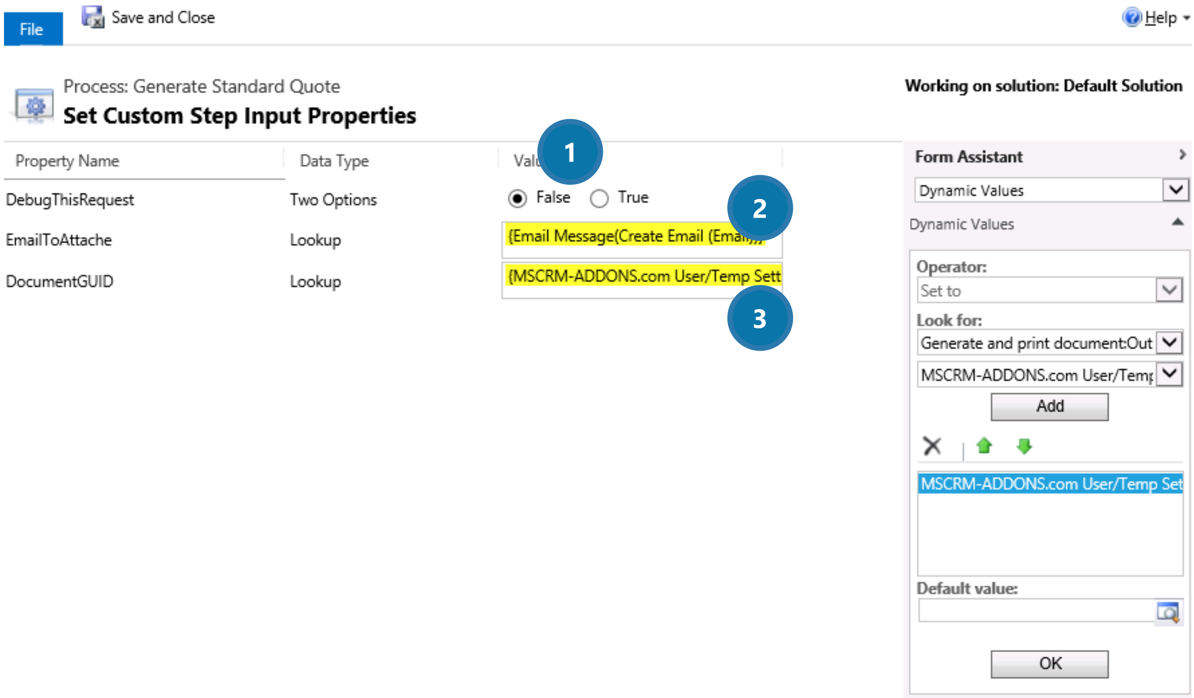


Figure 102: Create email properties

❶ DEBUGTHISREQUEST We set this property to *False* because we do not need any log files.

❷ LETTERTOATTACH We refer to the before created email using the *Form Assistant* (*Create (email)*) and *email message*).

❸ DOCUMENTGUID Here we have to link to the generated document. We use the *Form Assistant* again and select *Generate document only: OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings)* and *MSCRM-ADDONS.com User/Temp Settings*.

If the file type of the generated document is “html” this step will copy its content into the email body. Otherwise, the generated document will be added as an attachment to the email.

Now, the email is ready for sending. We use the *SendEmail*-step to do this. We name it *Send Email* and define its properties like in the below figure.

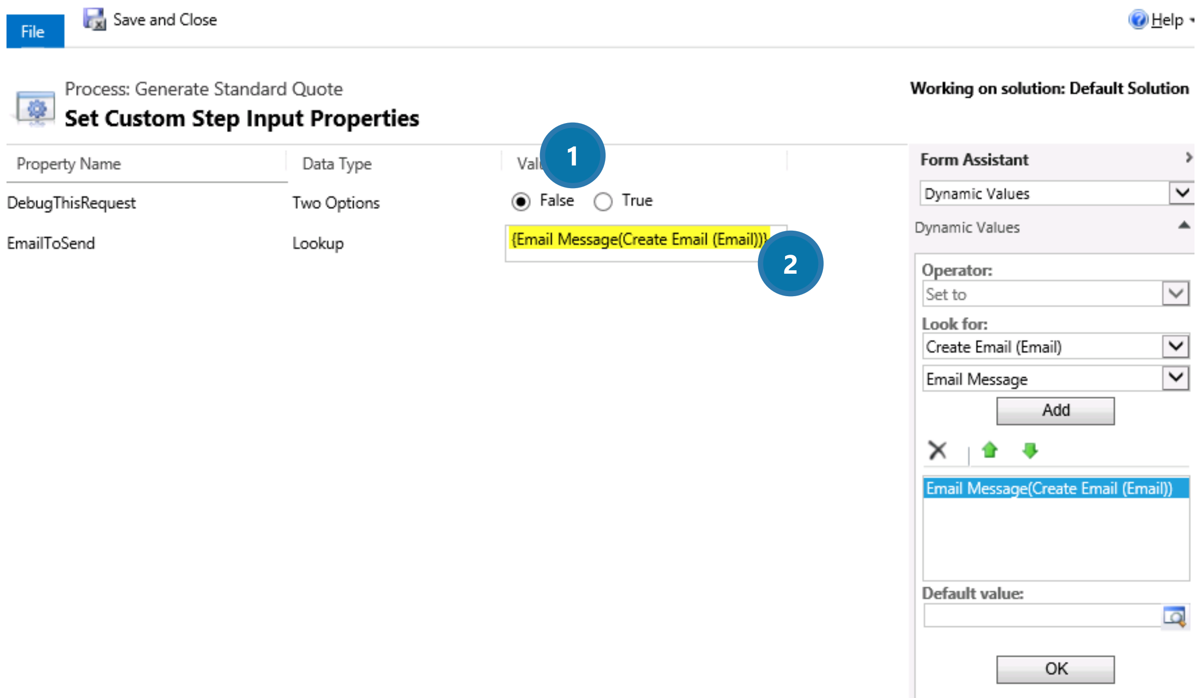


Figure 103: Send email properties

❶ DEBUGTHISREQUEST We set this property to “False” because we do not need any log files.

❷ EMAILTOSEND We refer to the before created email using the *Form Assistant (Create (email))* and *email message*).

7.5.3.4 Part 2.4: Attach to Letter

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

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

To this else branch, we add the following two steps:

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

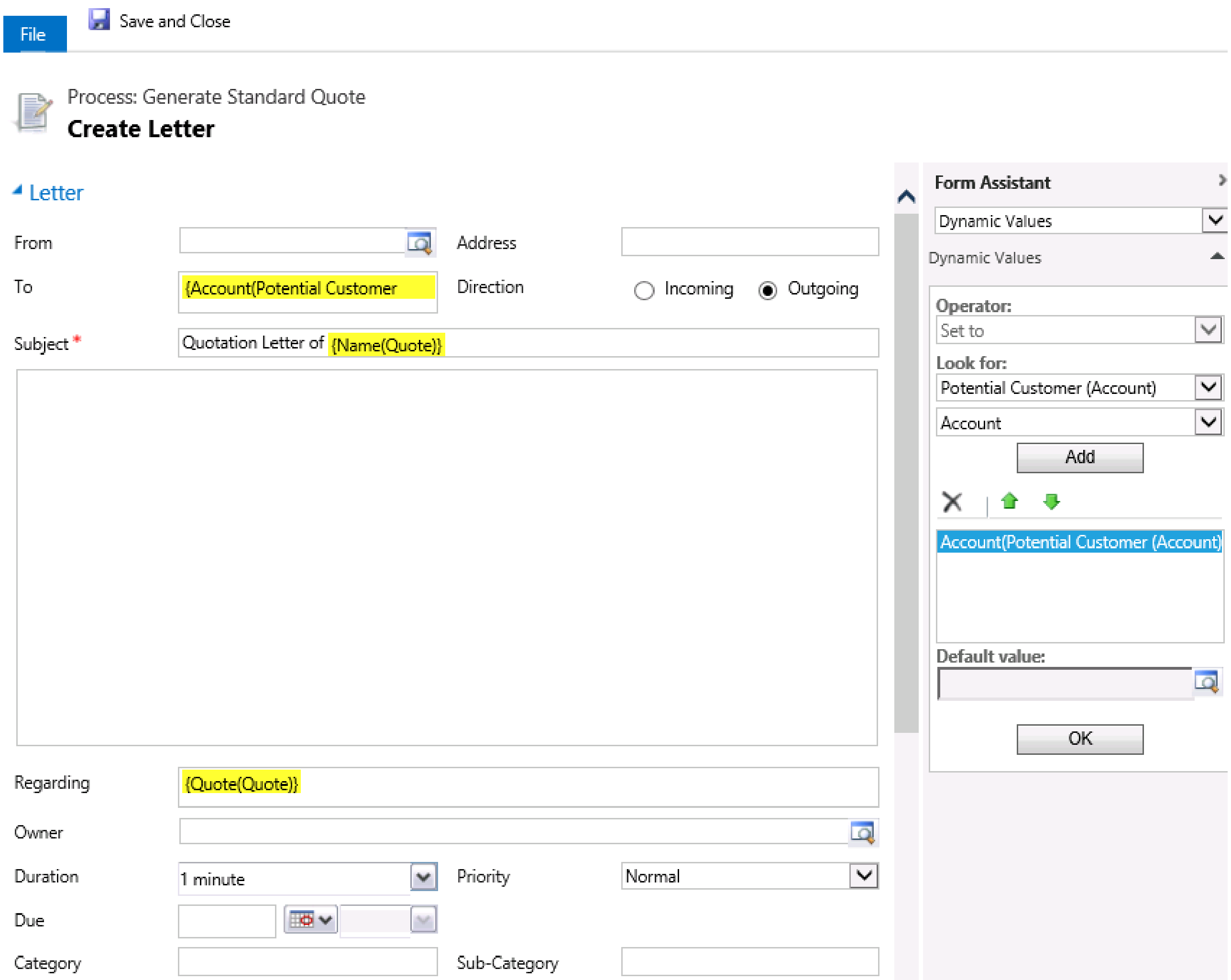


Figure 104: Create Letter properties

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

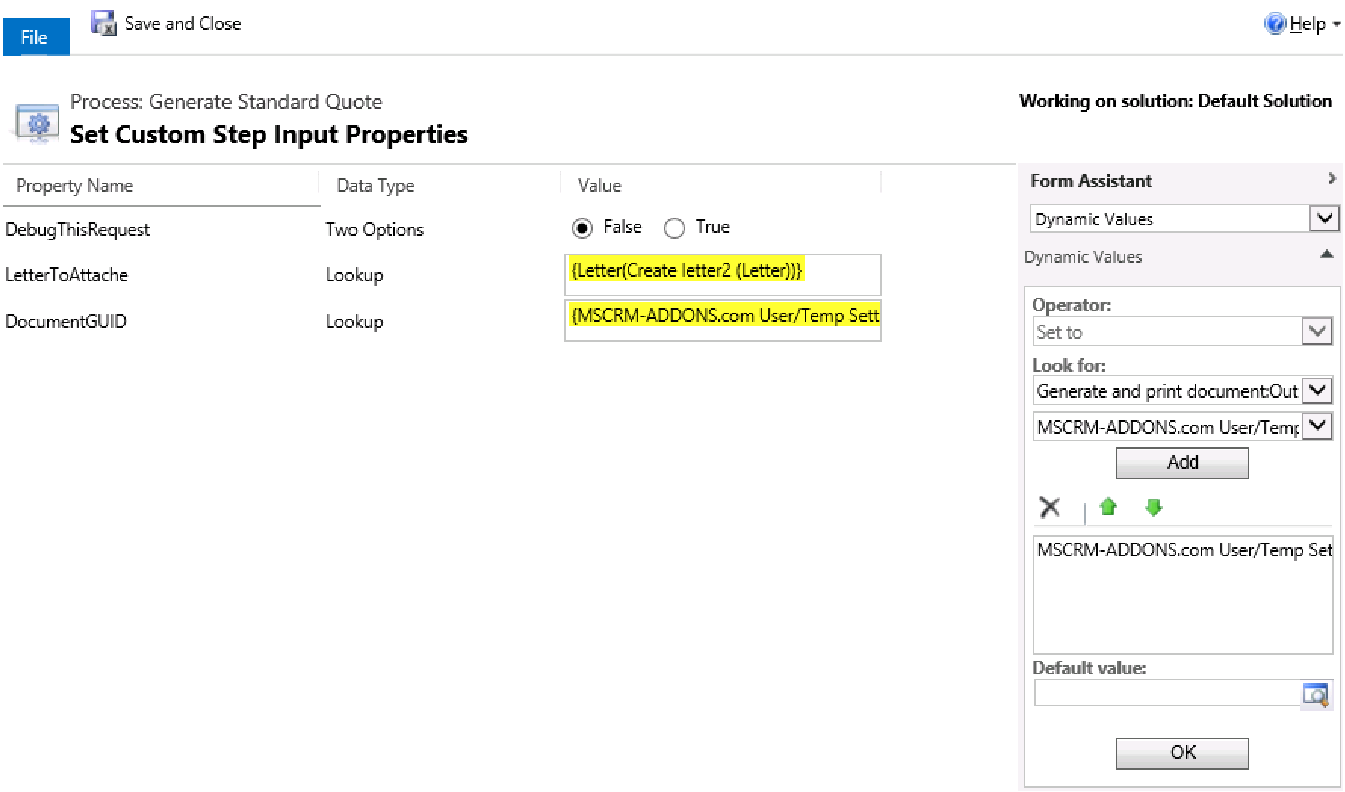


Figure 105: Attach to Letter Properties

At this point, the document is created and attached to an email or a letter, which means that we can now delete the temporary document again.

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

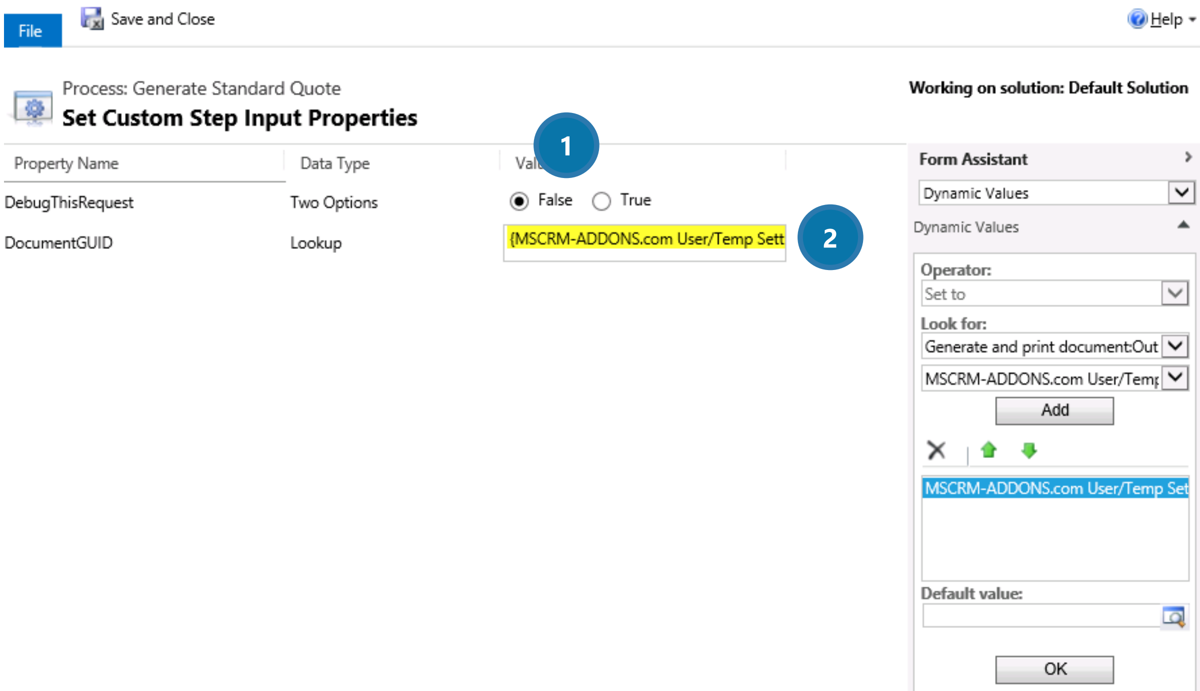


Figure 106: DeleteTempDocument

1 DEBUGTHISREQUEST We set this property to *False* because we do not need any log files.

2 DOCUMENTGUID Here we have to link to the generated document. We use the *Form Assistant* again and select *Generate document only: OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings)* and *MSCRM-ADDONS.com User/Temp Settings*.

Well, that's it!
After the dialog has been activated, it can be used.

7.6 Part 3: The Result Dialog

Once the dialog is ready to activate, the result looks like the below figure.

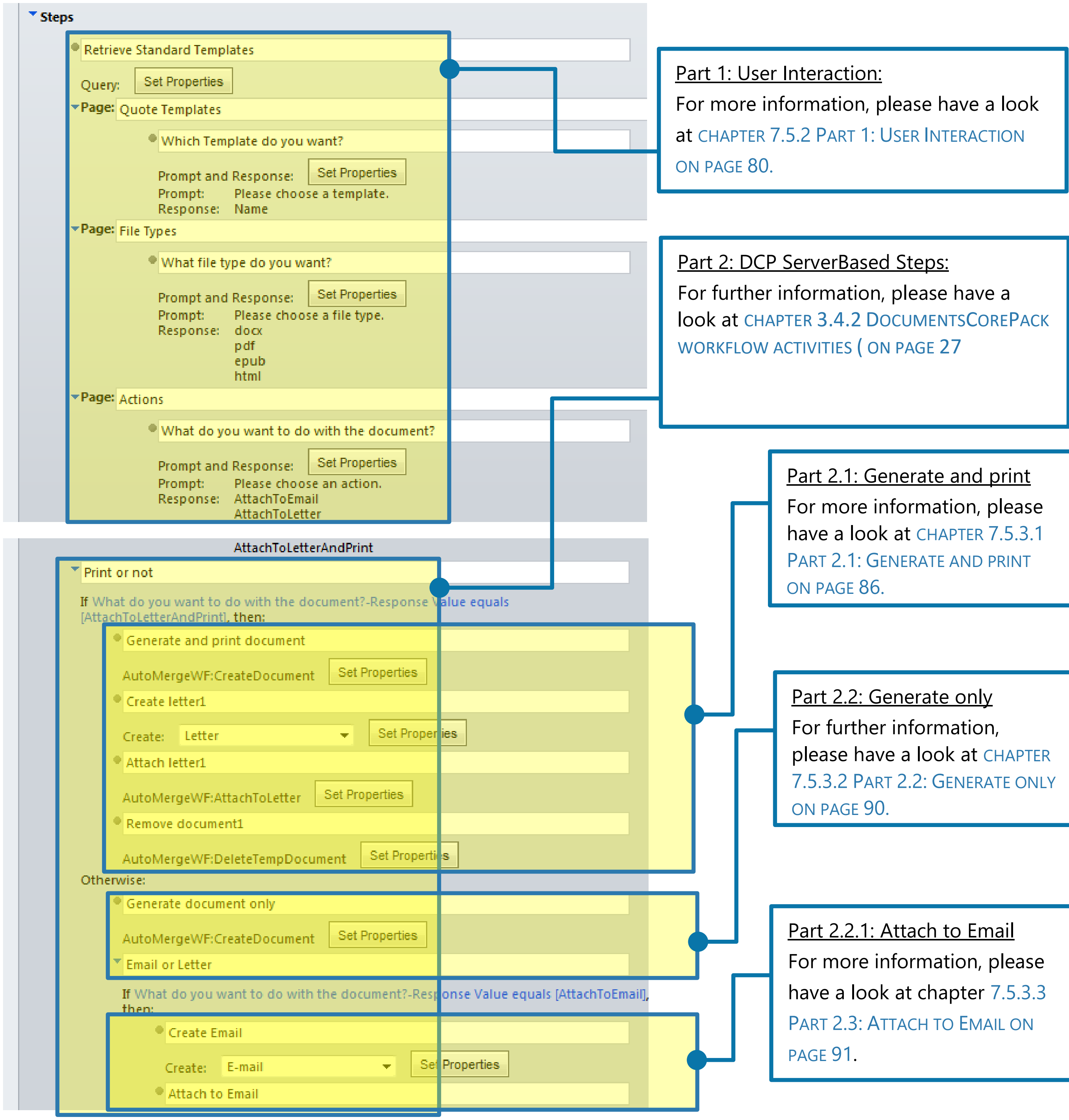


Figure 107: Result dialog

7.7 How to test a dialog

Whenever you create a new dialog, it is necessary to test it. We will test our dialog with a random quote.

7.7.1 Start the dialog

To start our dialog, we open a quote and press the ***[...]***-button (*more commands*) in the command bar. There, click on *Start Dialog*:

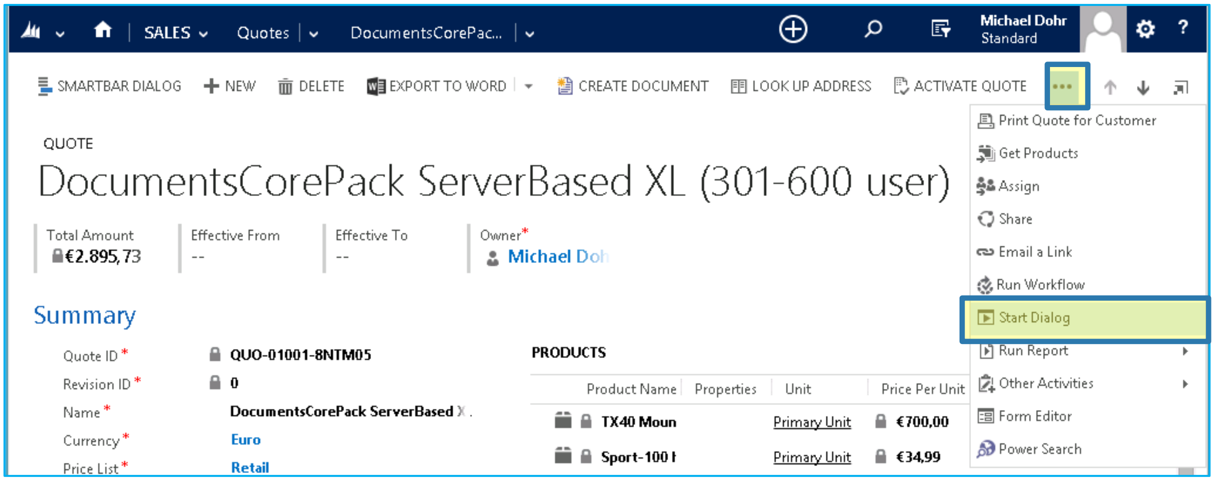


Figure 108: Open Start dialog in command bar

Now, we select a dialog of our choice, for example *Quote*. Click on the ***[Add]***-button to proceed.

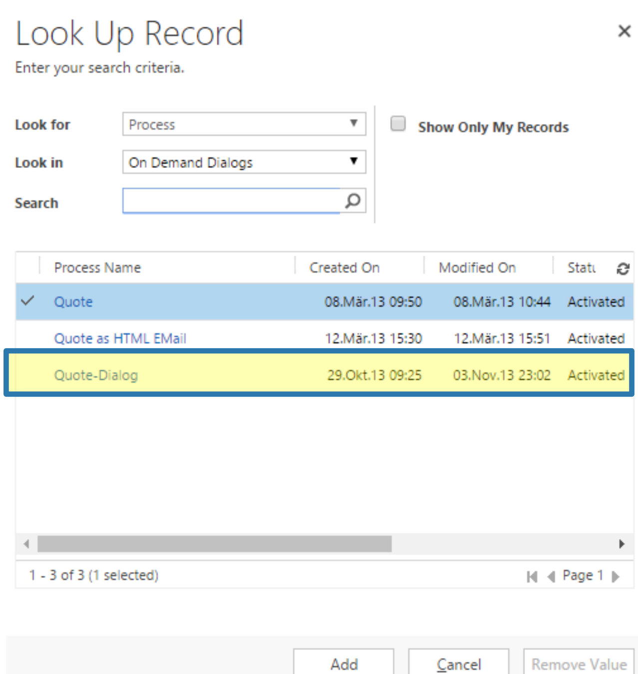


Figure 109: Select dialog: Generate Standard Quote

7.7.2 Select a standard template

First, we must choose between the standard templates. We select *Quote English Nice.docx* and click on the ***[Next]***-button to proceed.

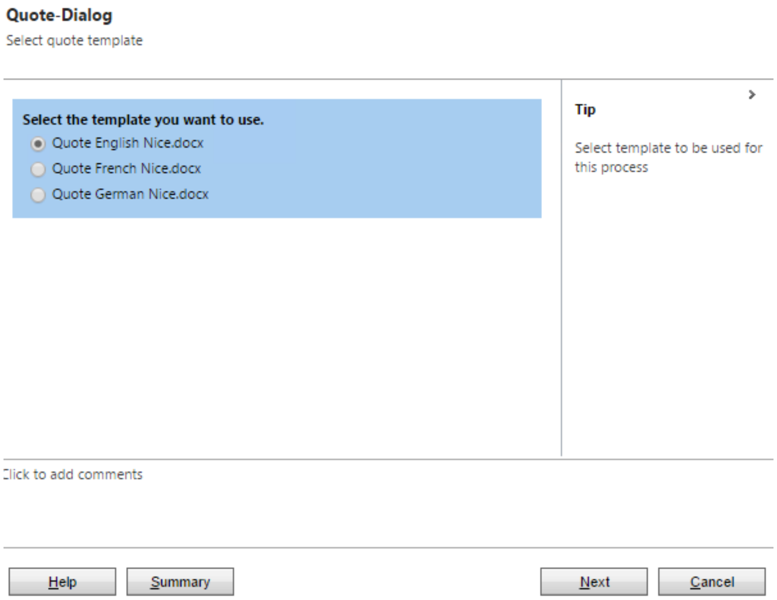


Figure 110: Select a template

7.7.3 Select the dialogs' steps

In the next window, you are asked if you want to print the created document or not. We check *Yes*.

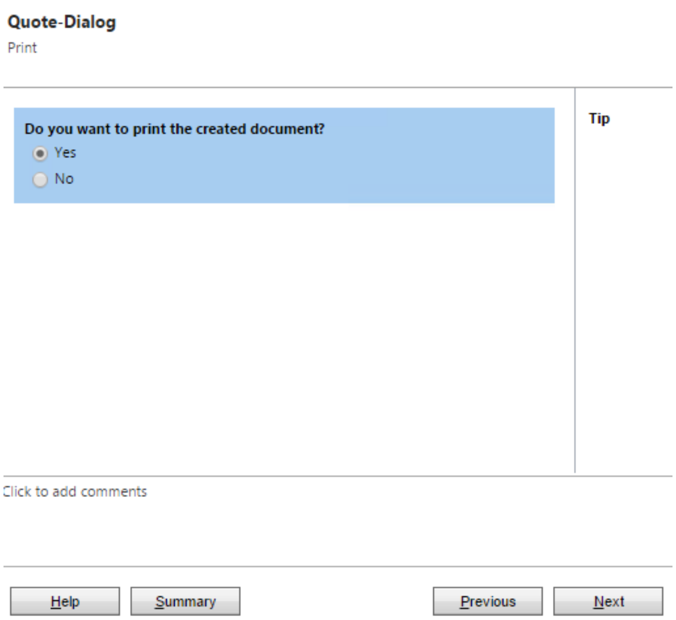


Figure 111: Do you want to print? (Dialog)

In this window, we have the possibility to select the file type. We select *pdf* and hit the ***[Next]***-button in order to continue.

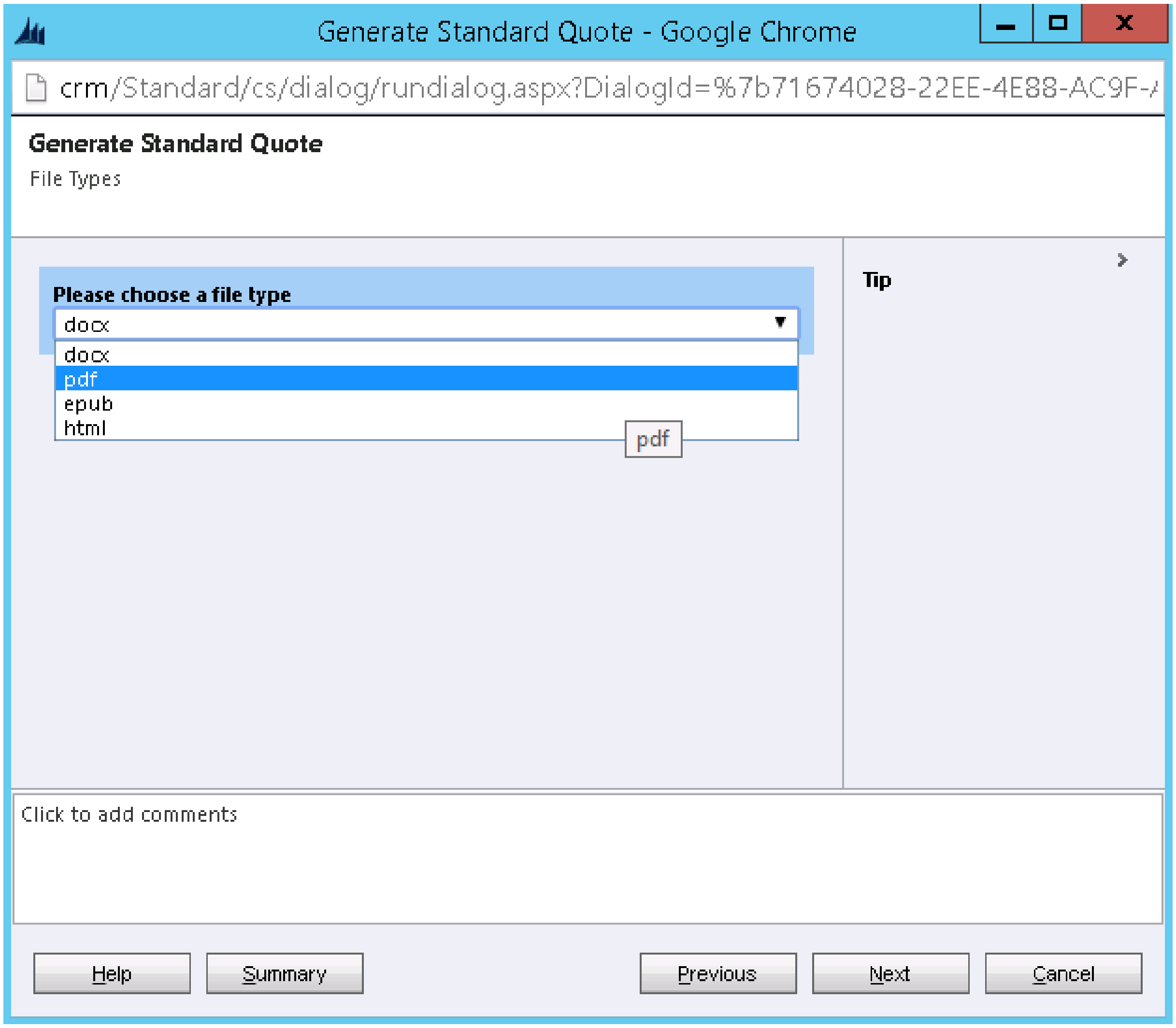


Figure 112: Select a file type

Next, we select an action and click on the ***[Next]***-button.

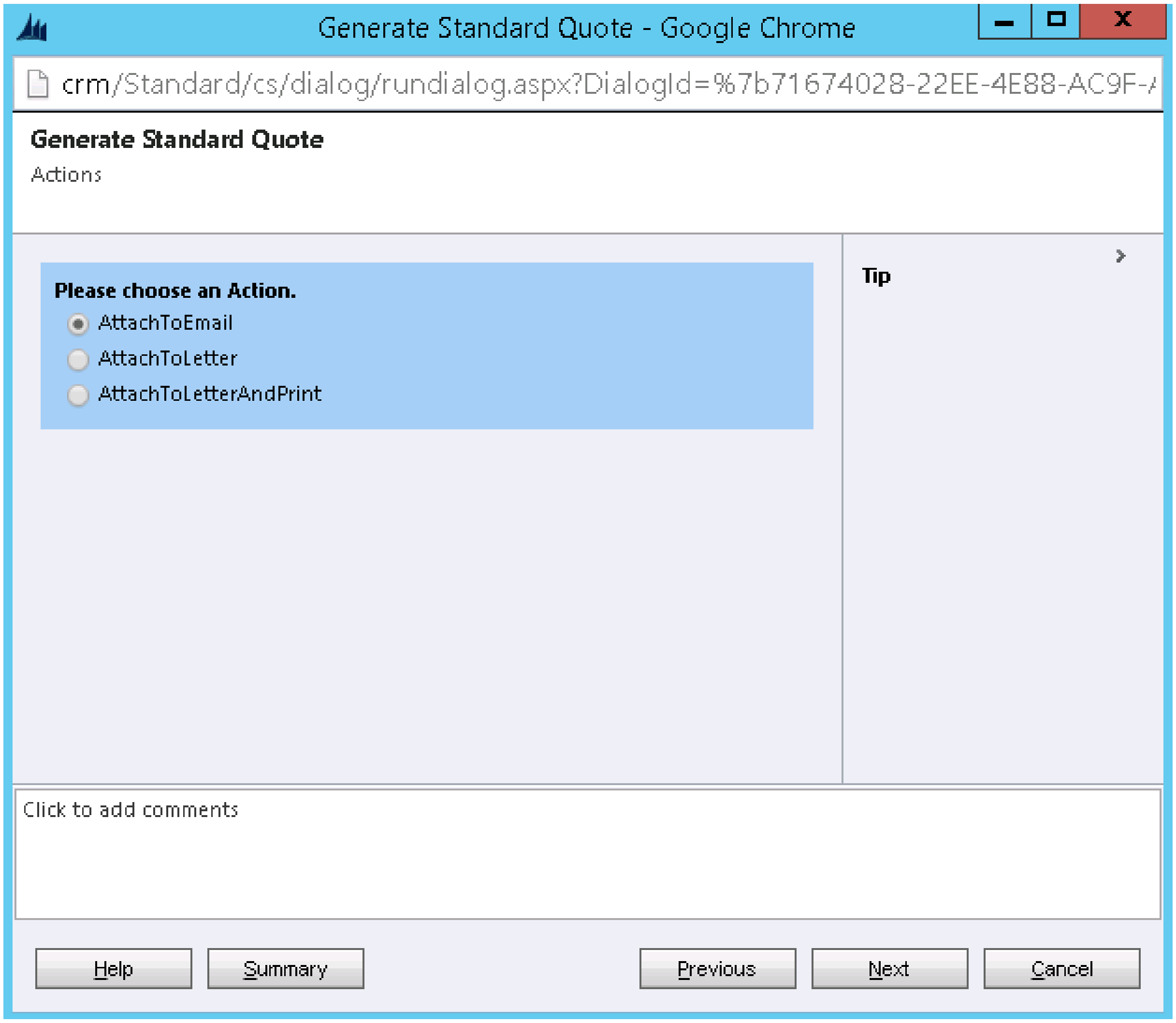


Figure 113: Select a file type

7.7.4 Finish the dialog

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

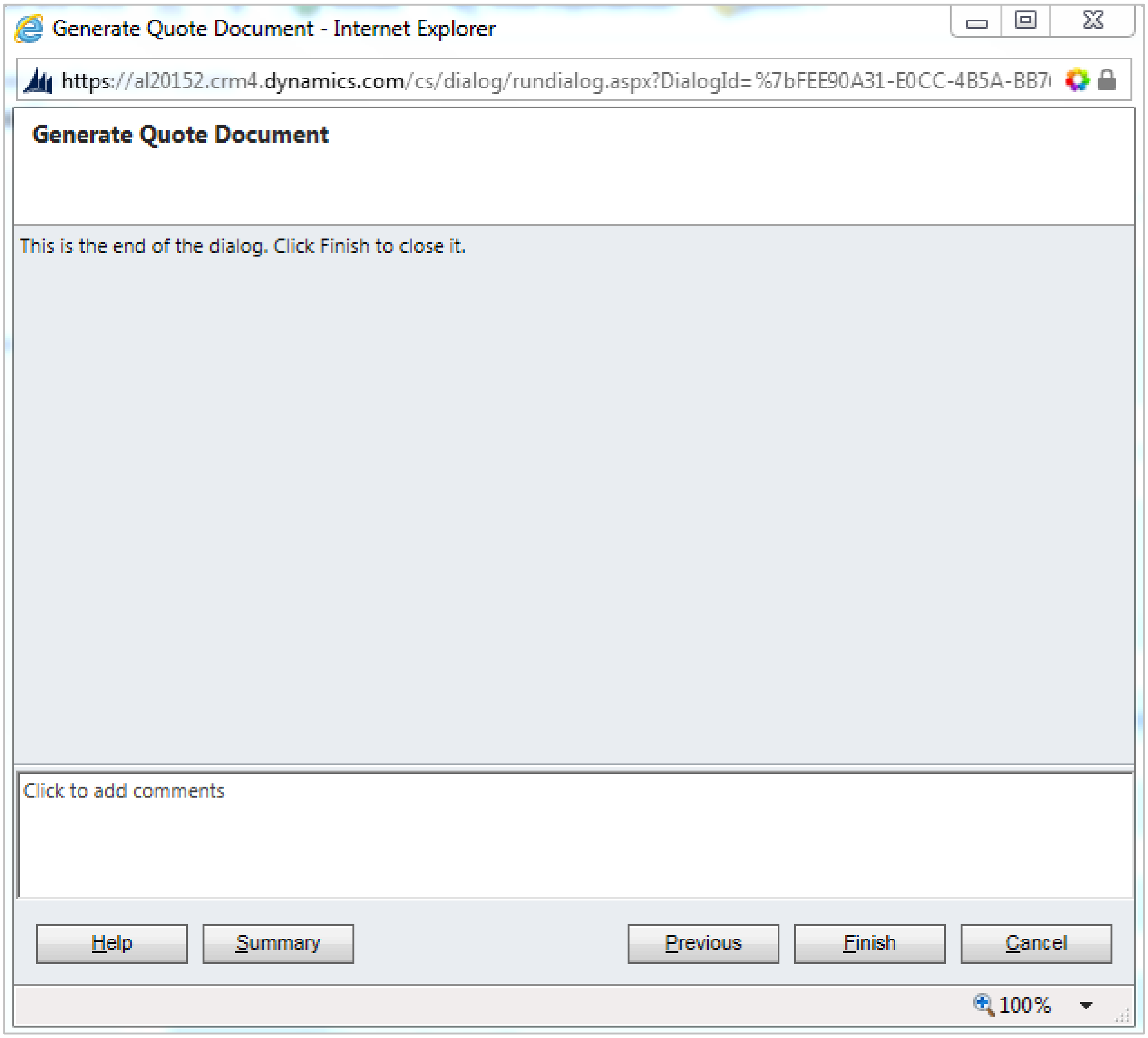


Figure 114: Proceed with a click on the [Finish]-button

7.7.5 The result

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

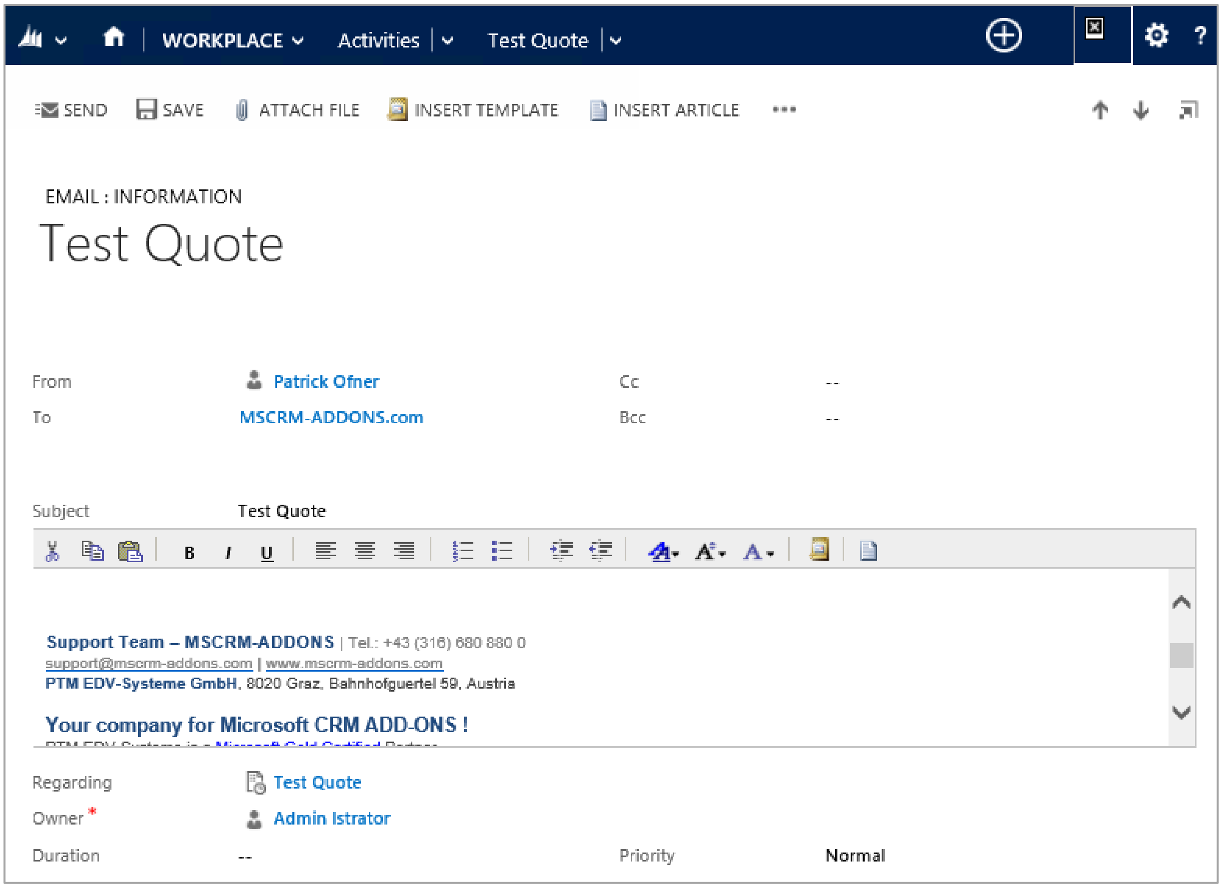


Figure 115: Closed activity area

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

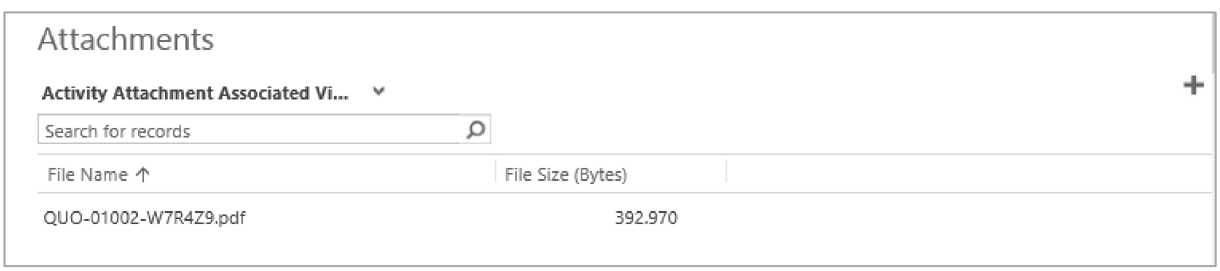


Figure 116: Generated document stored as .pdf

Also, we can open the attachment and are provided with our demo quote.

Demo-Company Inc., 1234-Demo Road

Your Company_logo

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

DearMr.James Elliott,

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

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

Total:€1,120.00

This quote is valid for XX days from today.

Terms and conditions conditions:
Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet.
Consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, n sea takimata sanctus est Lorem ipsum dolor sit amet.

Payment conditions:
Normally you have to buy at our online-shop and to pay in advance with Paypal, MasterCard, VisaCard or American Express.
If you prefer to pay by bank transfer, this is also possible, but we cannot forward the software-activation-key until the payment arrives in our account.

Figure 117: The result – demo quote

7.8 How to NOT to delete temp documents automatically

Sometimes, it is necessary to keep temp documents. If you have temp documents that you do not want to delete immediately after their creation or print, please follow this step-by-step tutorial.

7.8.1 Open the Advanced Find

Within CRM click on the ***[Advanced Find]***-button in the ribbon.

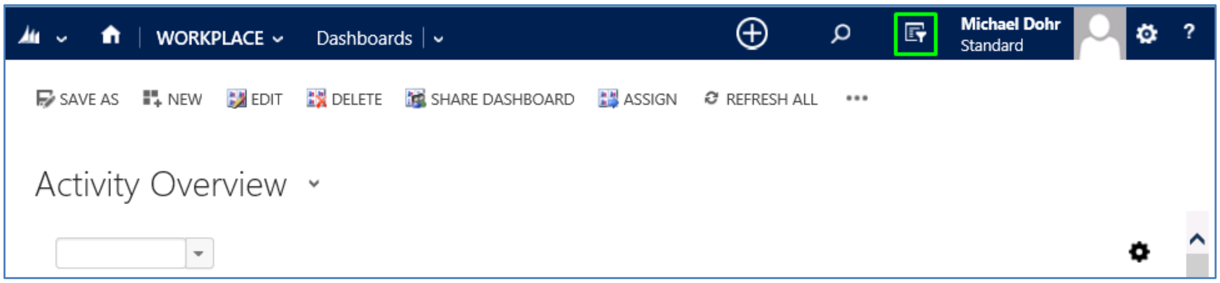


Figure 118: Open advanced find

7.8.2 Look for the Temp Settings

The following window will open. In the „Look for" box select the „MSCRM-ADDONS.com User/Temp Settings" entity.

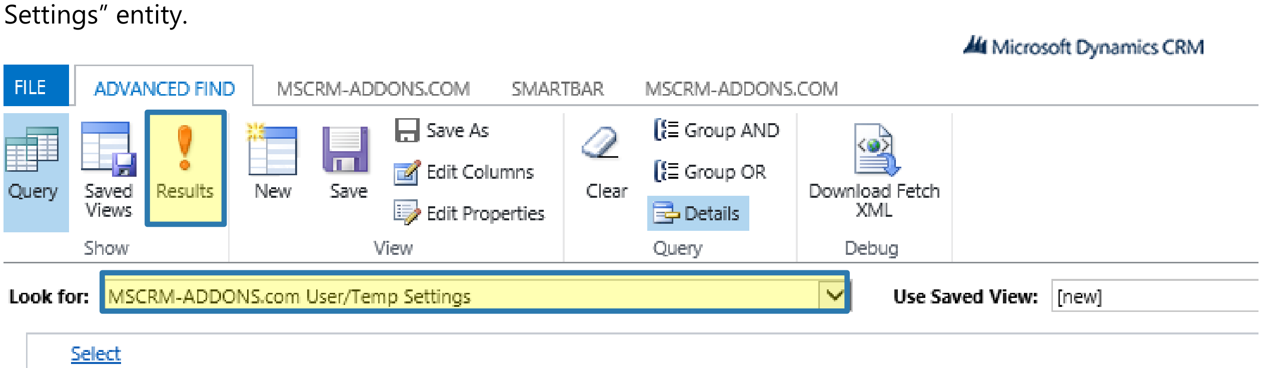


Figure 119: Look for the temp settings

7.8.3 Press Results

In order to receive all stored settings, simply hit the ***[Results]***-button. See next screenshot:

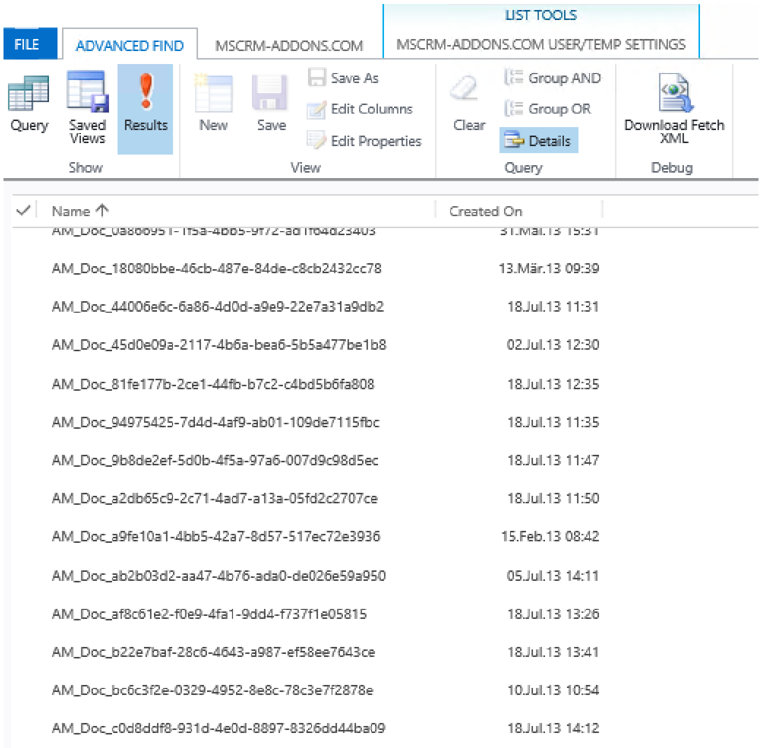


Figure 120: Results

To ensure that every record name is unique, DCP SB stores them per default by using the following structure:
***AM_Doc_* + a new Guide**

7.8.4 Have a look at the Template

If you want to have a look at the generated document directly, double-click on the record and navigate to the *Notes*-section.

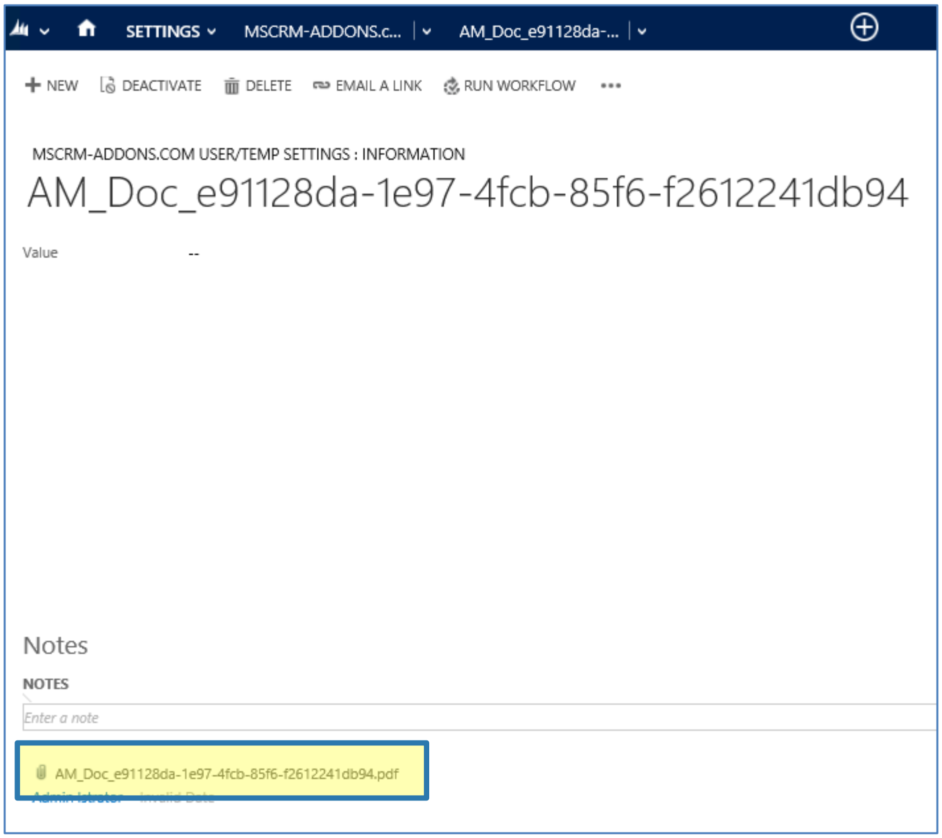


Figure 121: Results

There you can see the generated document attached. Its name corresponds to the *Document Name*-setting of the template. If the name is not defined, the default structure (*AM_Doc_ + a new Guide*) will be taken automatically. In this example, the generated document is a *.pdf* This was defined in the *SaveAs* property of the *CreateDocument*-step. To open the document, simply click on it.

7.9 How to install a printer which is visible for services

Go to the Control Panel -> Devices and Printers. Click on the ***[Add a printer]***-button (see screenshot below).

Make sure that the printer you select is a local one.

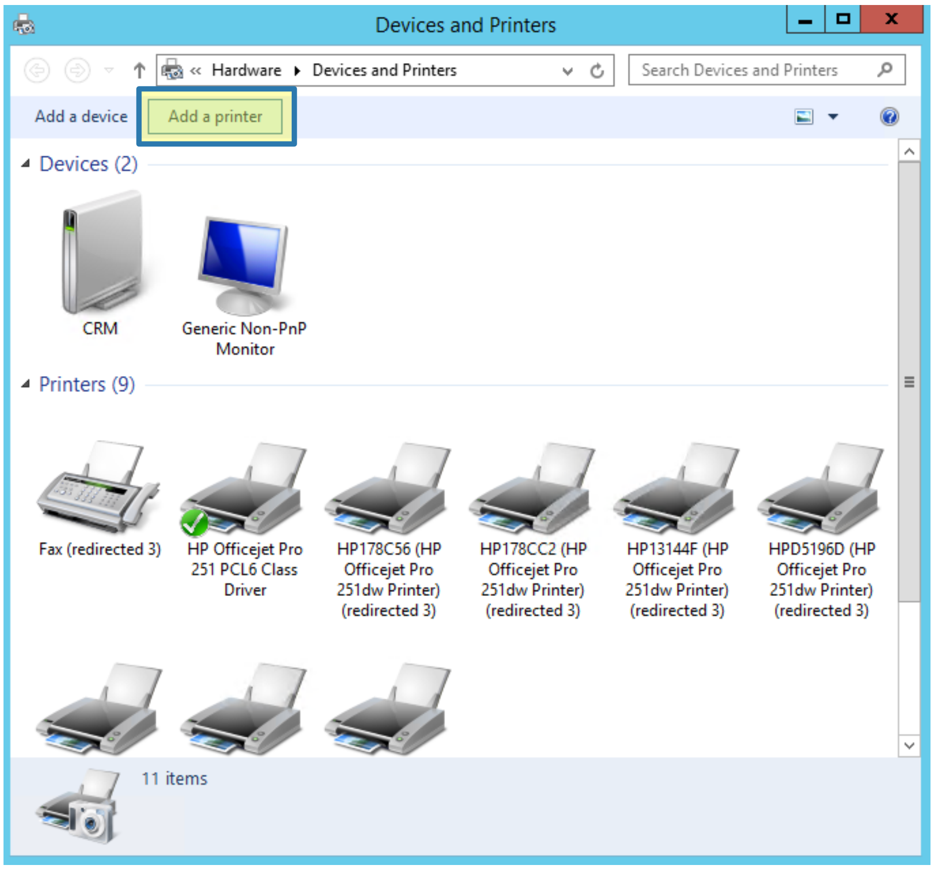


Figure 122: Add a printer

Step through the wizard and create a new port. Type in a simple name for the printer, without using spaces. This makes it easier for you to retype the printer name in the different workflows of DCP Server. Once finished, please try to print a test page to see if it works correctly.

7.10 How to configure and start a print service

7.10.1 Start the service configuration

Start the *Service Configuration DocumentsCorePack for MS CRM 2015/2016* from within the Windows start menu:

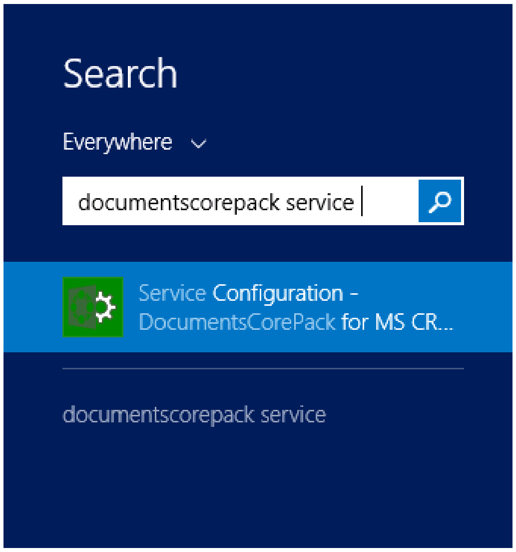


Figure 123: Start service configuration

7.10.2 Create a new service or select an existing one

To do so, navigate to the general tab. If you want to create a new service, type in a name of the service and click on the ***[Verify]***-button.

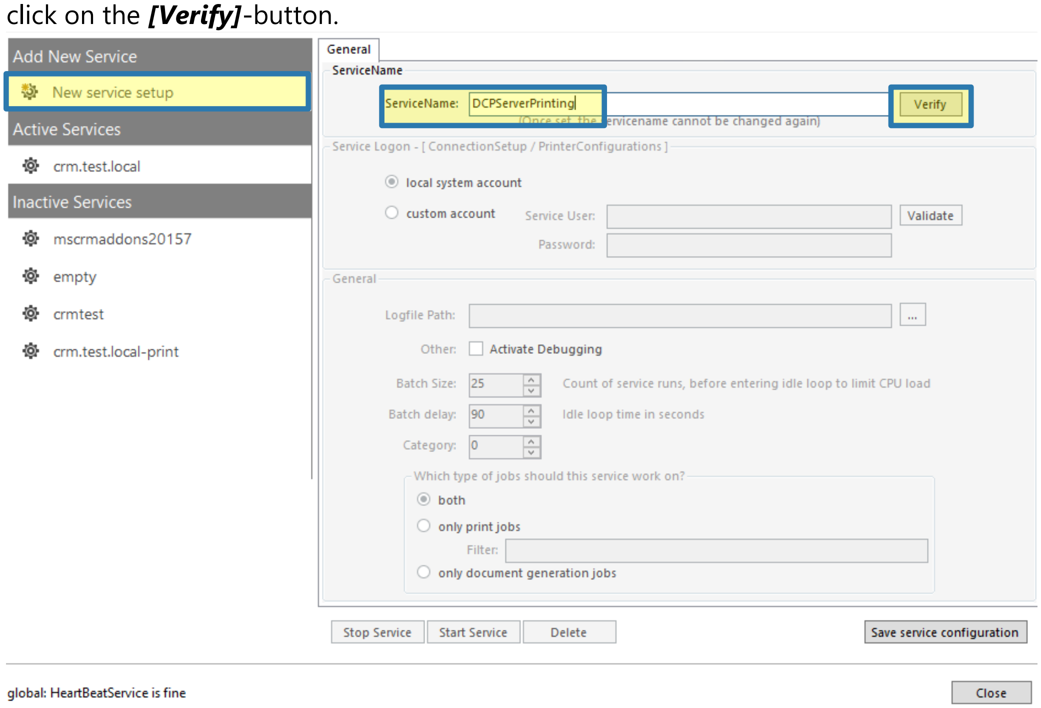


Figure 124: Create new service or select existing one

7.10.3 Select the print jobs

Now you have to define which type of jobs the service should work on. Check only *printjobs*. Furthermore, you have the possibility to set a filter for the printer to be used. Setting this filter is essential, for example in the following case:

If you have offices in two different countries (e.g. America and Austria), you can type in the name of the printer located at your site (e.g. at your Austrian office) in order to avoid that your documents are printed by the printer located at the other site (e.g. at your American office).

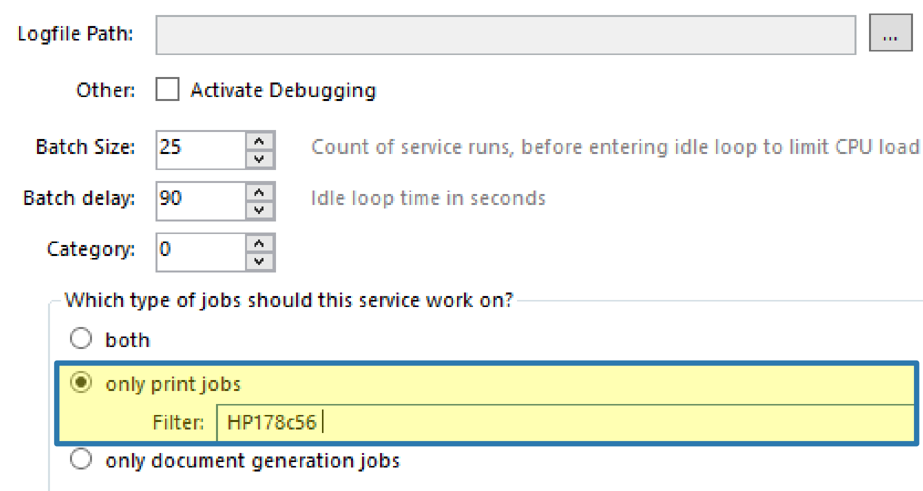


Figure 125: Create a new service or select existing one

7.10.4 Select the CRM type

Now switch to the *CRM Connection Setup*-tab, select your CRM type, type in the CRM Server-URL and click on the ***[Retrieve all Organizations]***-button. Then click on the ***[OK]***-button to confirm.

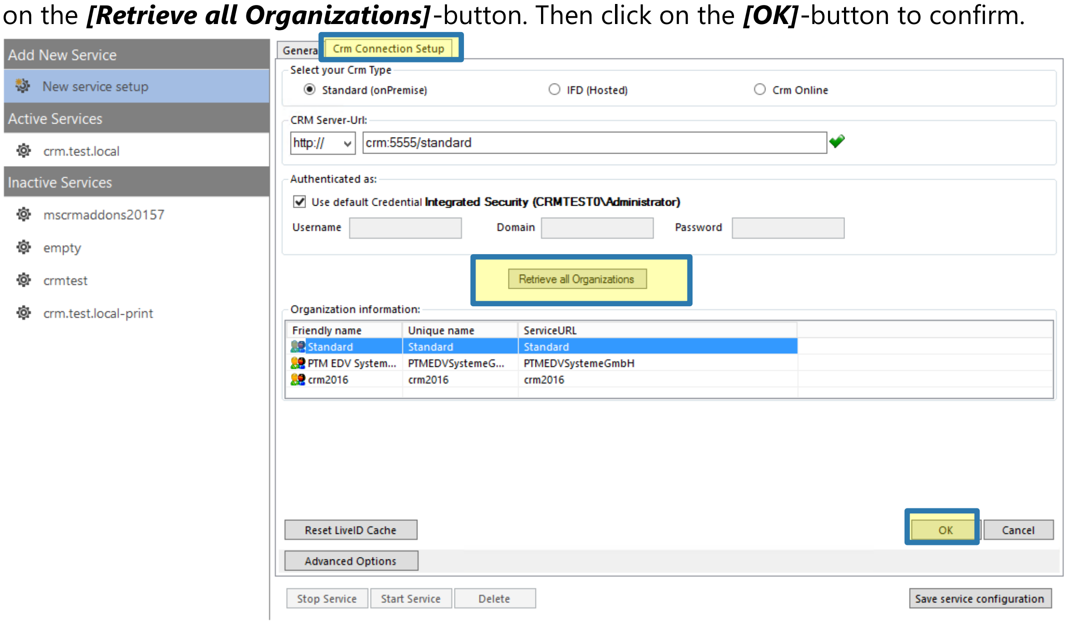


Figure 126: Select the CRM type

Now, the following window appears:

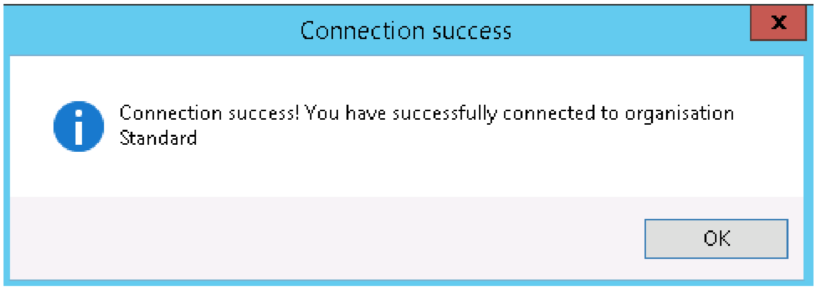


Figure 127: Connection success

Now click on the ***[Save Service Configuration]***-button. In case the below message box appears, simply click on the ***[OK]***-button as well.

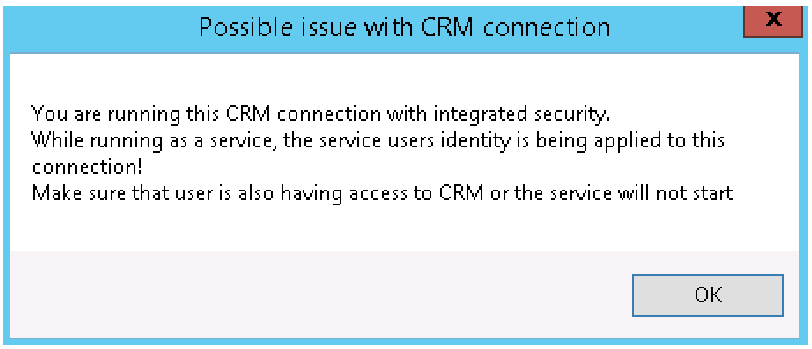


Figure 128: Possible issue with CRM connection dialog

7.10.5 Open the CRM Connection Advanced Options

Within the “CRM Connection Setup”-tab click on the ***[Advanced Options]***-button.

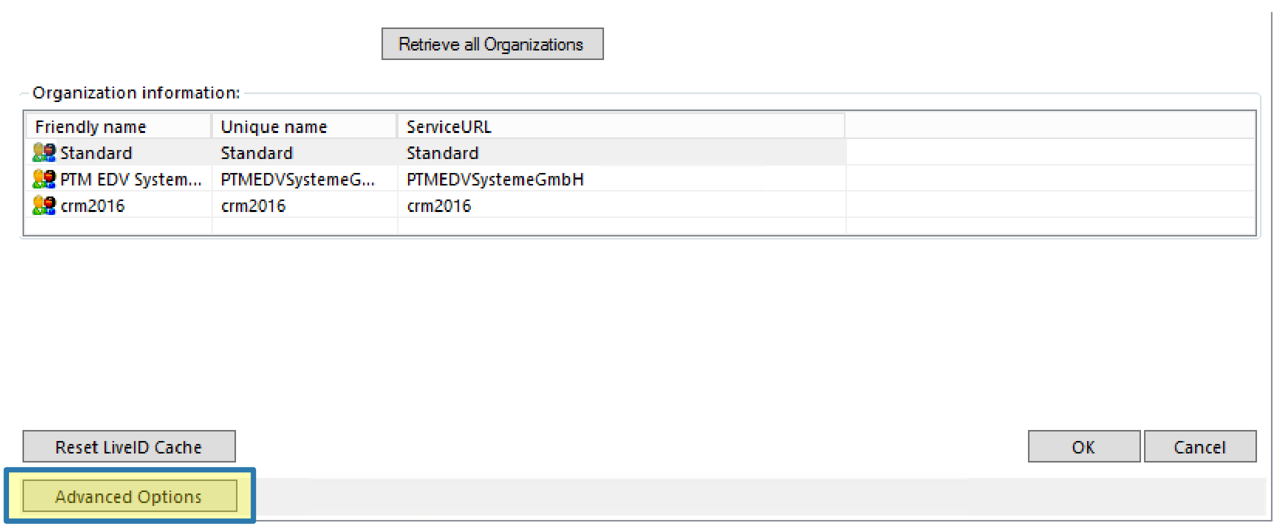


Figure 129: Possible issue with CRM connection dialog

This action opens the Connection Dialog. Within the Advanced Settings of the Connection Dialog, you can set your CRM online option, enable your proxy settings and define the credentials etc. Return to the CRM Connection tab to save your settings. For further information on the Connection Dialog, please have a look at our Connection Dialog Documentation.

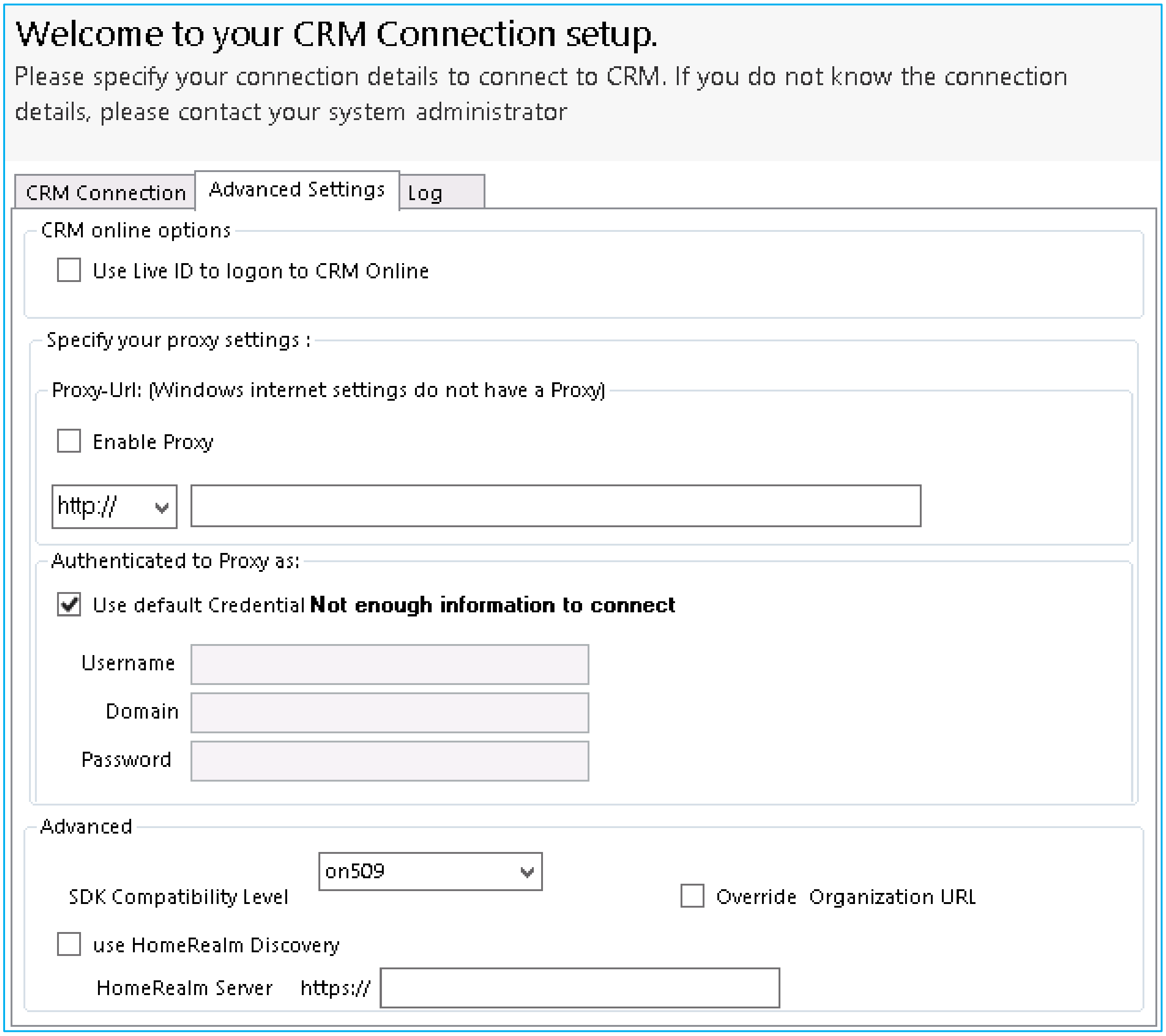


Figure 130: Advanced Options – CRM connection dialog

7.10.6 Start the service

Afterwards, click on the ***[Start Service]***-button and the service will start to run in the background

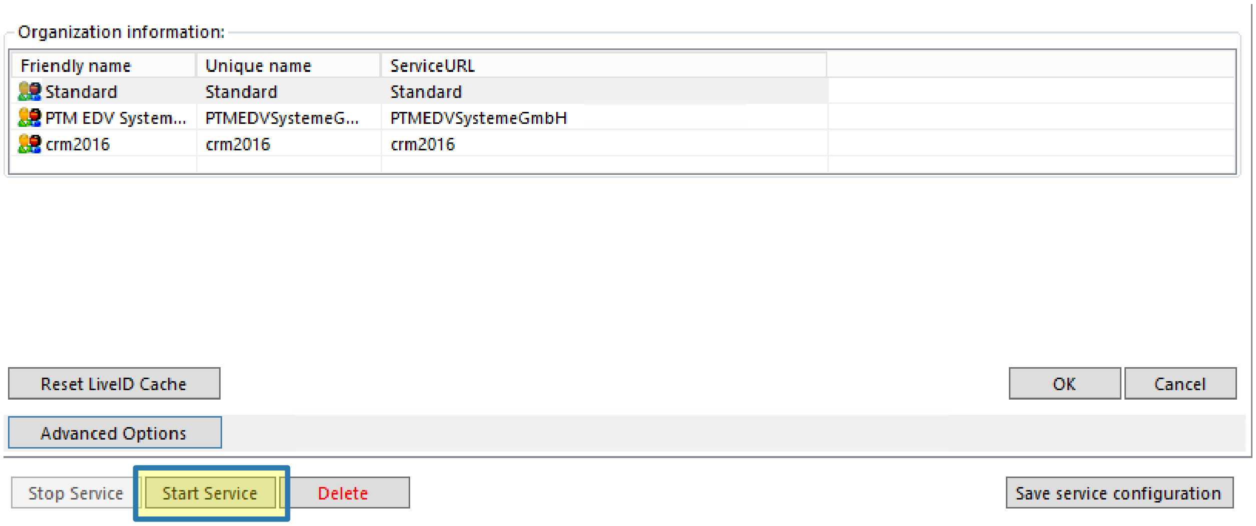


Figure 131: Click on the Start Service-button

To continue, go to the new added service called *DCPServerPrinting* (1) and switch to the *Printer*-Tab (2). Select your printer there:

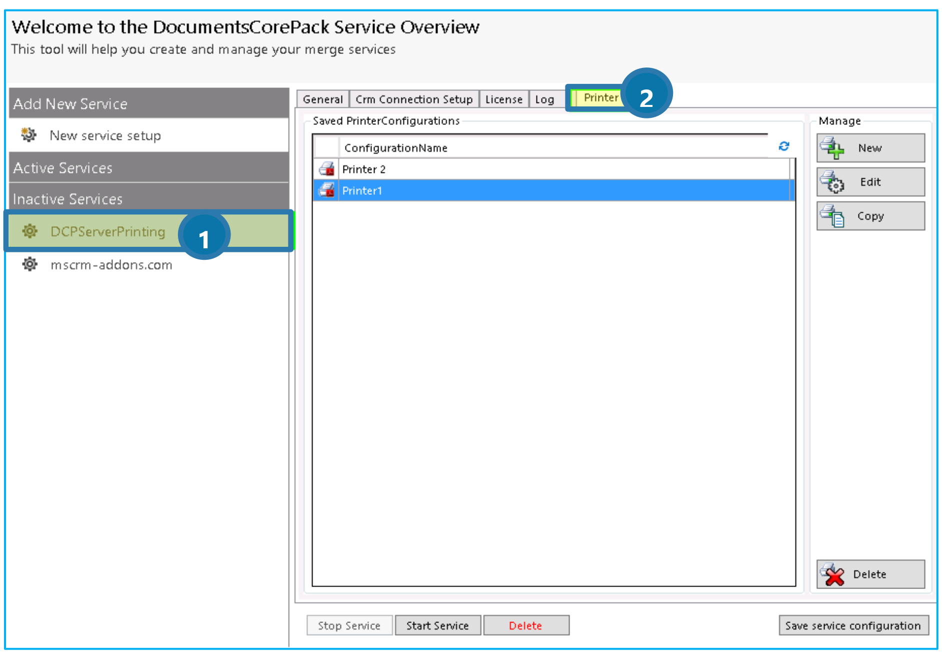


Figure 132: Select a printer

That's it!

7.11 How to create a Printer Configuration

In order to create a new configuration, click on the ***[New]***-button in the *DocumentsCorePack ServerBased Printing*-Tab.

This action will open the following dialog where you must type in a Configuration name before you can go on:

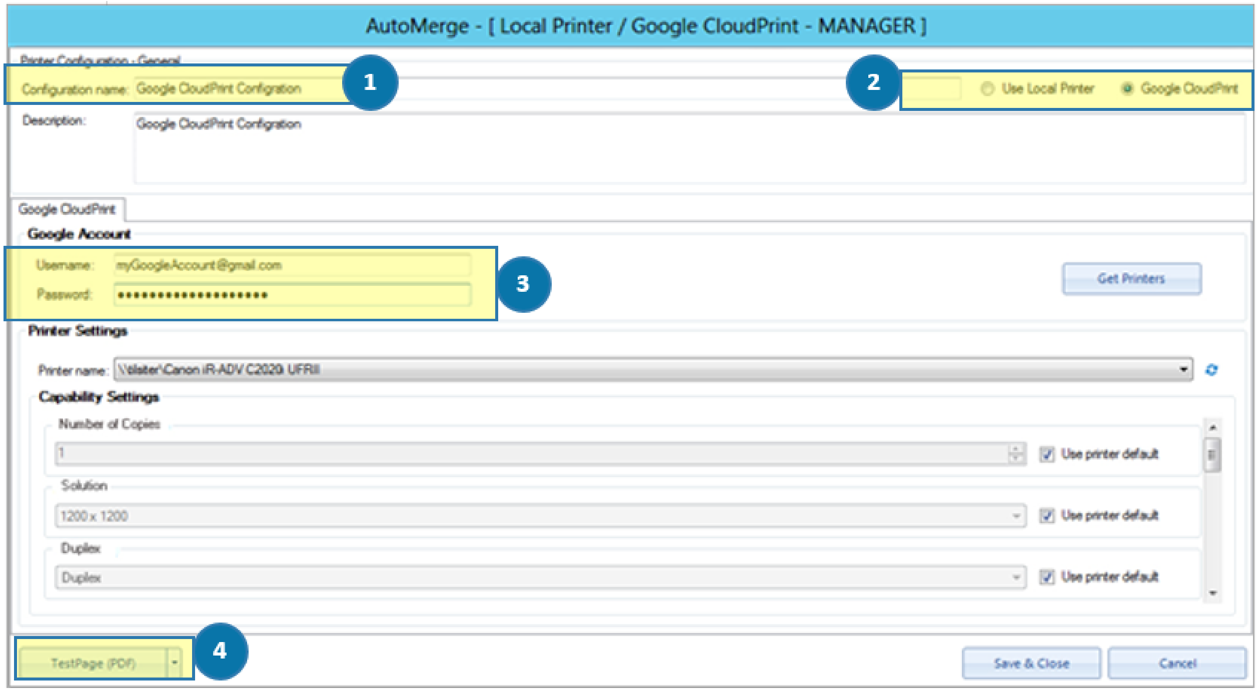


Figure 133: Configure a printer

❶ You must specify a configuration name to be able to create a printer configuration.

❷ Google CloudPrint Mode is enabled per default.

Modifying the printer type will discard all changes you have done on the current setting!

❸ Supply your Google account credentials to retrieve the list of available printers for that account.

❹ Click on the drop-down button or open a saved document to print a TestPage

Google Cloud Printer

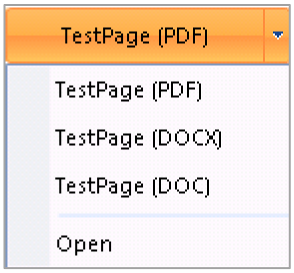


Figure 134: Google Cloud printer testpages

Local Printer

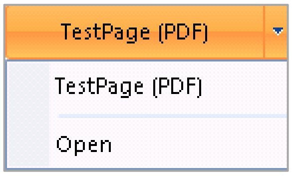


Figure 134 Local printer testpages

That's it!
After having configured and started the service for printing, you can start to configure a workflow including the service-based printing option. To learn more about this option, have a look at CHAPTER 7.12 HOW TO ADD A SERVICE-BASED PRINTING STEP TO A WORKFLOW OR DIALOG ON PAGE 117.

7.12 How to add a service-based printing step to a workflow or dialog

After the creation of a local or cloud printer configuration with the *ServiceManagement*, they can be added to a dialog or workflow. In this step-by-step tutorial, you will learn how to use them in the dialog or workflow.

7.12.1 Create a new workflow

Start your CRM. Open *Processes* > *Settings*. Here, you have the possibility to create a new workflow. For more information on how to create a workflow, have a look at chapter 3 How to use DocumentsCorePack ServerBased on page 9. Add a *CreateDocument*-step to your workflow and select *MSCRM-ADDONS.com AutoMergeWorkingItems* in the drop-down menu.

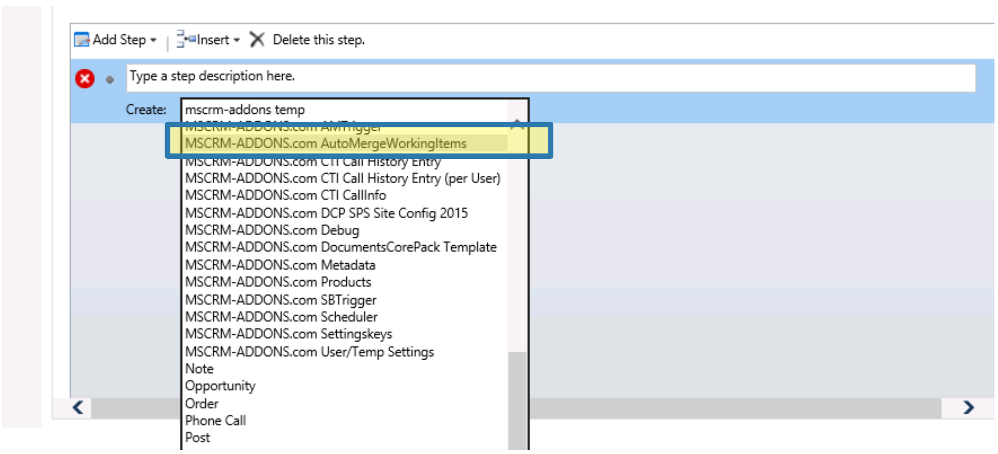


Figure 135: MSCRM-ADDONS.com AutoMergeWorkingItems

7.12.2 Open the step's properties

To do so, click on the [Set Properties]-button.

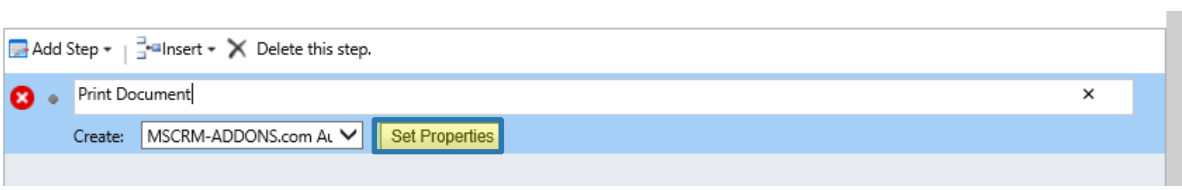


Figure 136: Print document – set properties

A new window opens. Within this window, you can continue to appropriately configure the newly added step. Type in the name of the step (1) and select *PrintDocument* as *AutoMerge Action*
Then go to the *Print Document*-section and click on the look-up-field next to the *Printer*-field and define, which printer the generated document should be sent to.

Before you select the printer within this step, you have to ensure that the printer has been installed and added appropriately. Furthermore, it is crucial to use the same name as used during the printer-installation process. For more information, please have a look at CHAPTER 6 HOW TO FILTER LINKED ENTITIES DURING THE MERGE PROCESS ON PAGE 64.

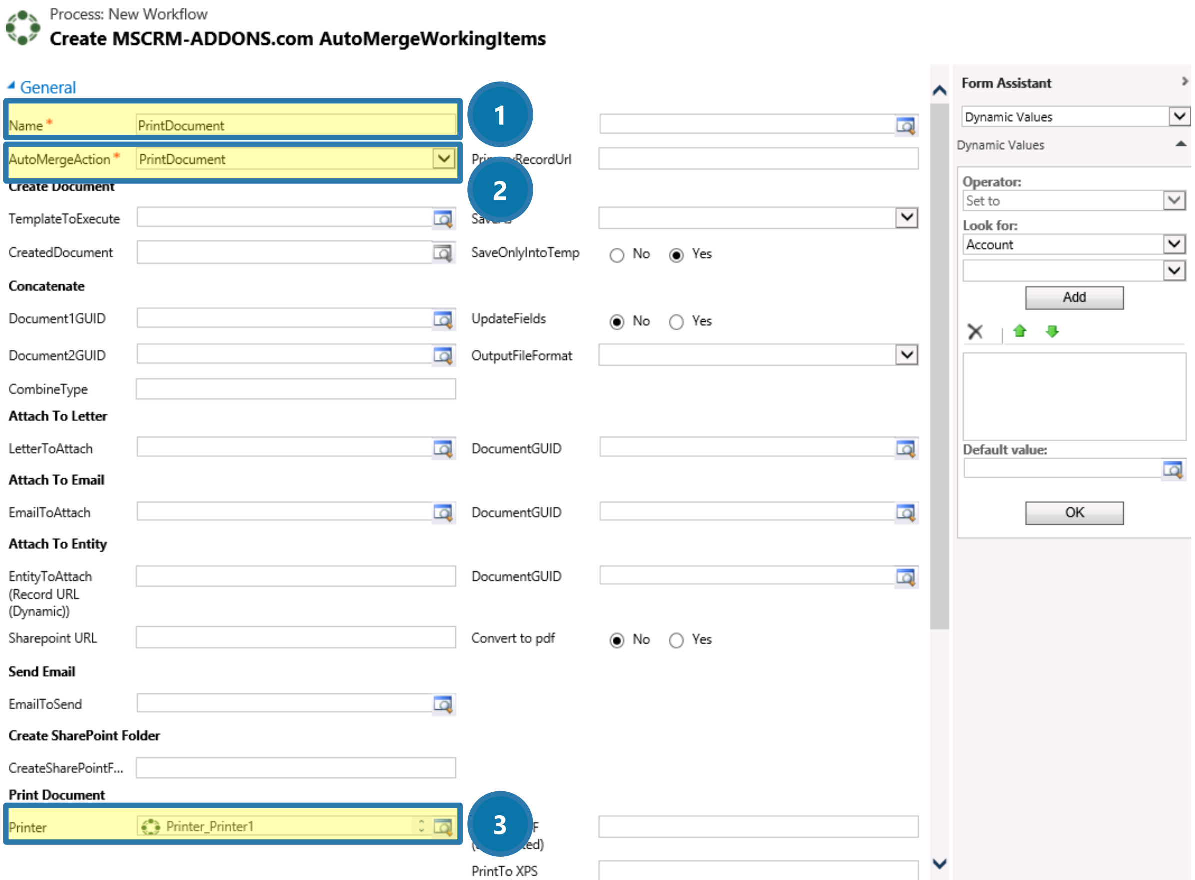


Figure 137: PrintStep: Configure AutoMerge Working Items

Finish the configuration of the service-based printing step by adding the *PrimaryRecordURL*. To do so, you have to select *CreateDocument:OutputDocumentRef* (1) from the first drop-down menu of the *Look for*-area within the form assistant on the right. Afterwards, select *RecordURL(Dynamic)* (2) from the drop-down menu.

Then, click on the ***[Add]***-button (3) and on the ***[OK]***-button (4). Afterwards, the *PrimaryRecordURL*-field is automatically filled. Click on the ***[Save and Close]***-button (5). Now you have appropriately added the service-based printing step.

If there is already a printer name specified within the *PrintTo*-field in the *Create Document*-section, you have to delete this name to avoid double printing.

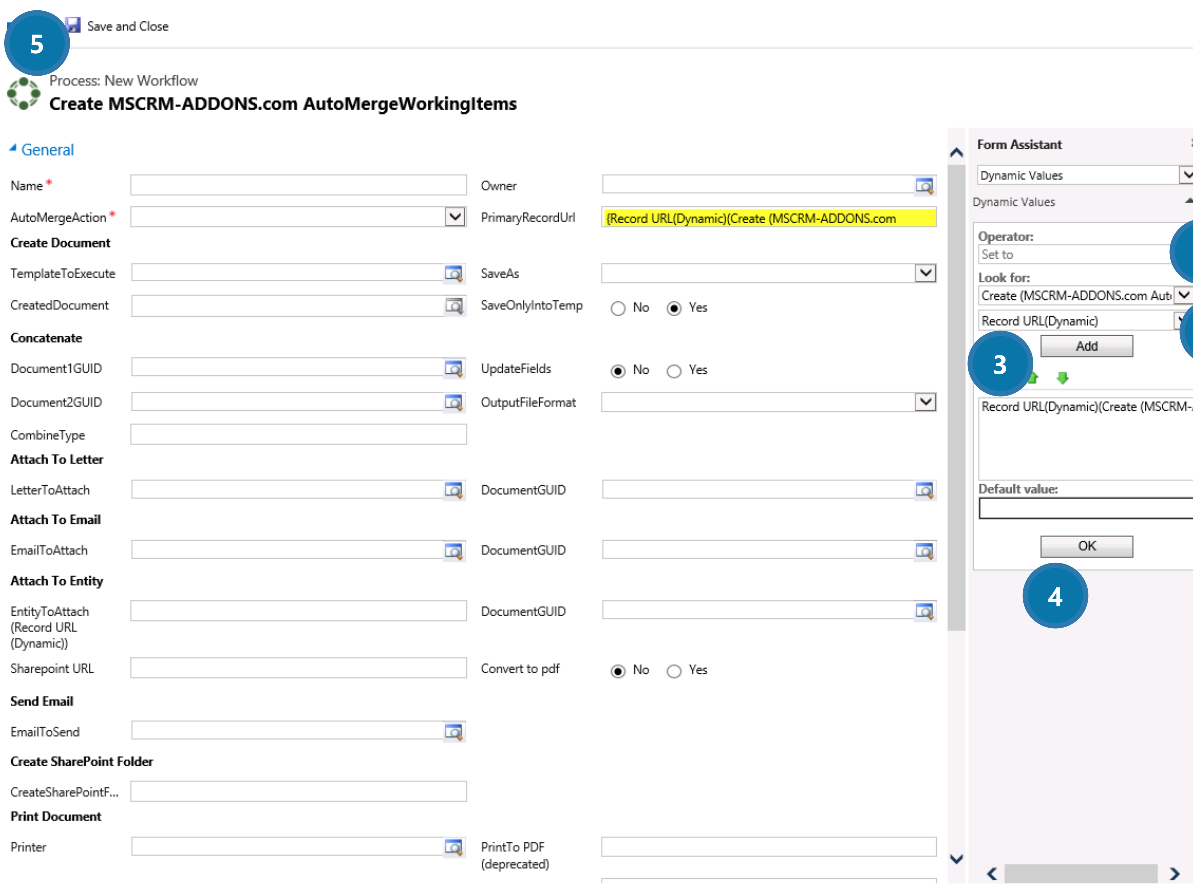


Figure 138: PrintStep: Configure AutoMerge Working Items

7.13 How to delete a plug-in-based printer step

Learn, how to delete a plug-in-based printing in the course of this step-by-step tutorial.

7.13.1 Step 1: Select and deactivate workflow

Select the workflow which you would like to modify and deactivate it. Then double-click on it and open the *CreateDocument*-step by clicking on ***[Set Properties]*** (1). A new window will open. Within this window, delete the printer-name (2) and click on the ***[Save and Close]***-button.

After having deleted the plug-in based printer step, you can add the service-based printer step directly after the already existing *Create Document*-step of the workflow. To do so, please follow the steps in CHAPTER 7.14 HOW TO ADD SERVICE-BASED PRINTING TO WORKFLOWS INCLUDING A DELETE DOCUMENT STEP ON PAGE 121.

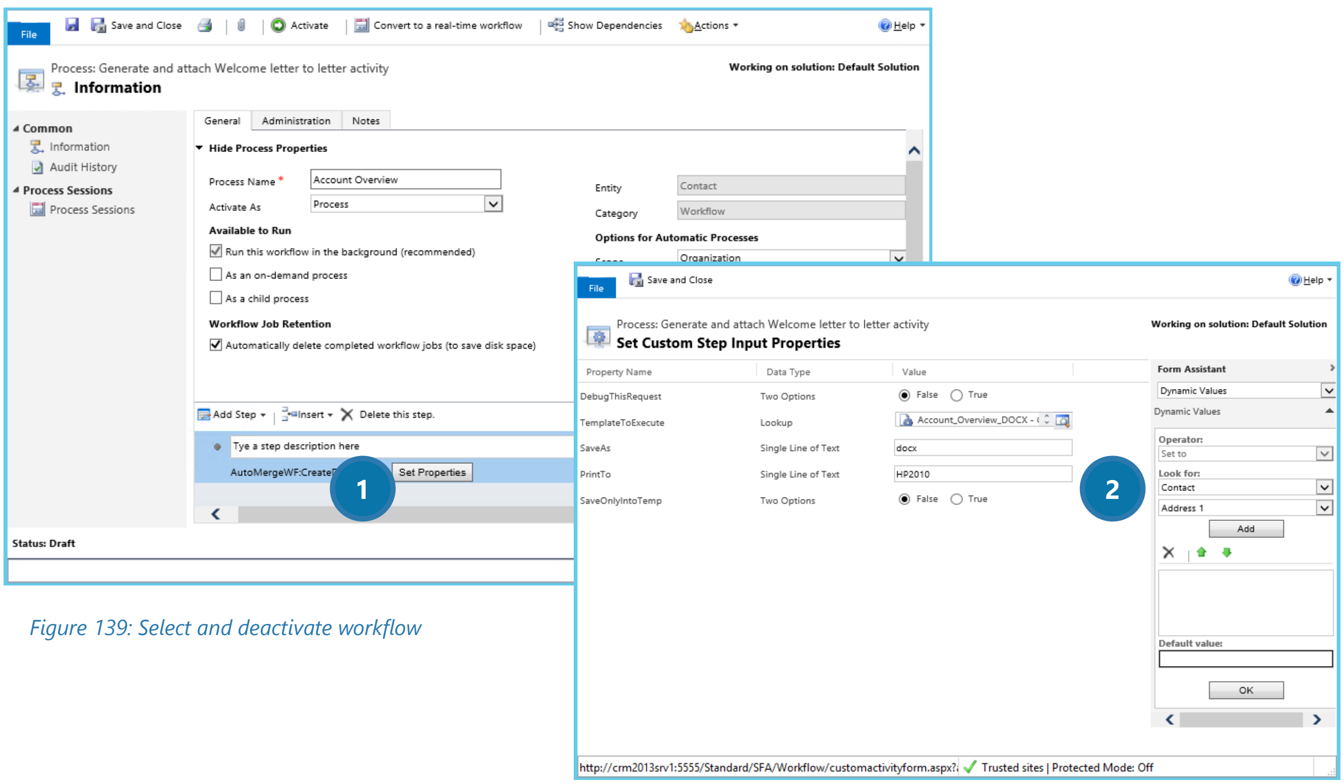


Figure 139: Select and deactivate workflow

7.14 How to add service-based printing to workflows including a *delete document* step

If you want to add the service-based printing step to a workflow which includes a *Delete Document*-step it is important to know that the service is only checking every 90 seconds if there are generated documents to be printed.

In the worst case, documents are generated and deleted within this 90 seconds and the service is not able to print the documents because they have been already deleted. To avoid this, it is important to include a *Wait*-condition before the *Delete Document*-step in your workflow.

7.14.1 Add a Wait-condition

Click on *Add Step* and select *Wait Condition* from the drop-down menu. Next, click on the ***[Set properties]***-button.

7.14.2 Specify the Wait-condition

Click on *<condition> (click to configure)* within the newly added wait condition. A new window opens. Within this new window, you have to specify the wait condition. Select *Print Document (MSCRM-ADDONS.com AutoMergeWorkingItem* from the first drop-down menu, *Status* from the second, *Equals* from the third and *Inactive* from the last drop-down menu.

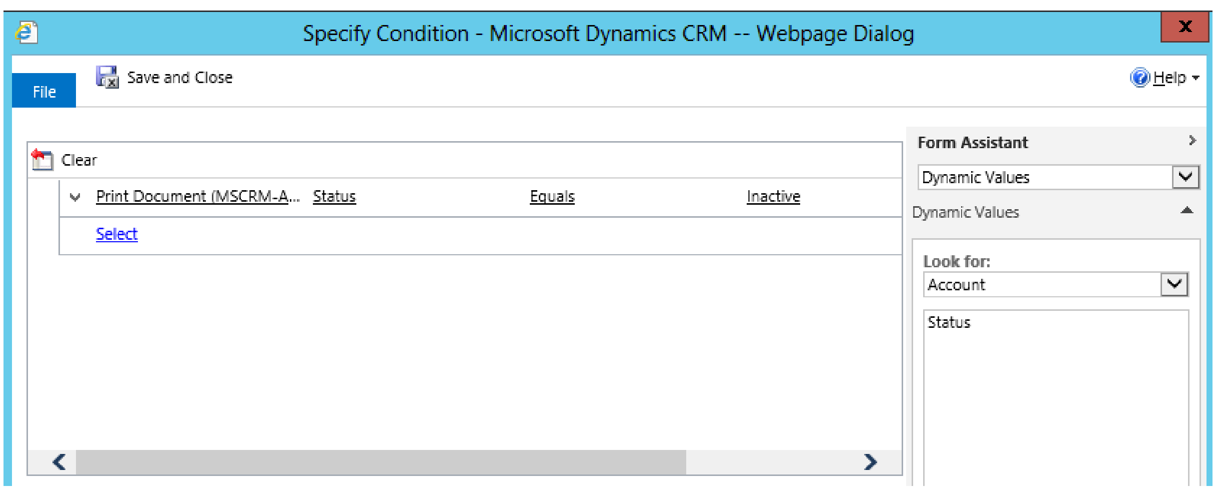


Figure 140: Specify wait-condition

The condition now causes that generated documents are only deleted if they have been already printed. Afterwards, click on the ***[Save and Close]***-button to complete this workflow step.

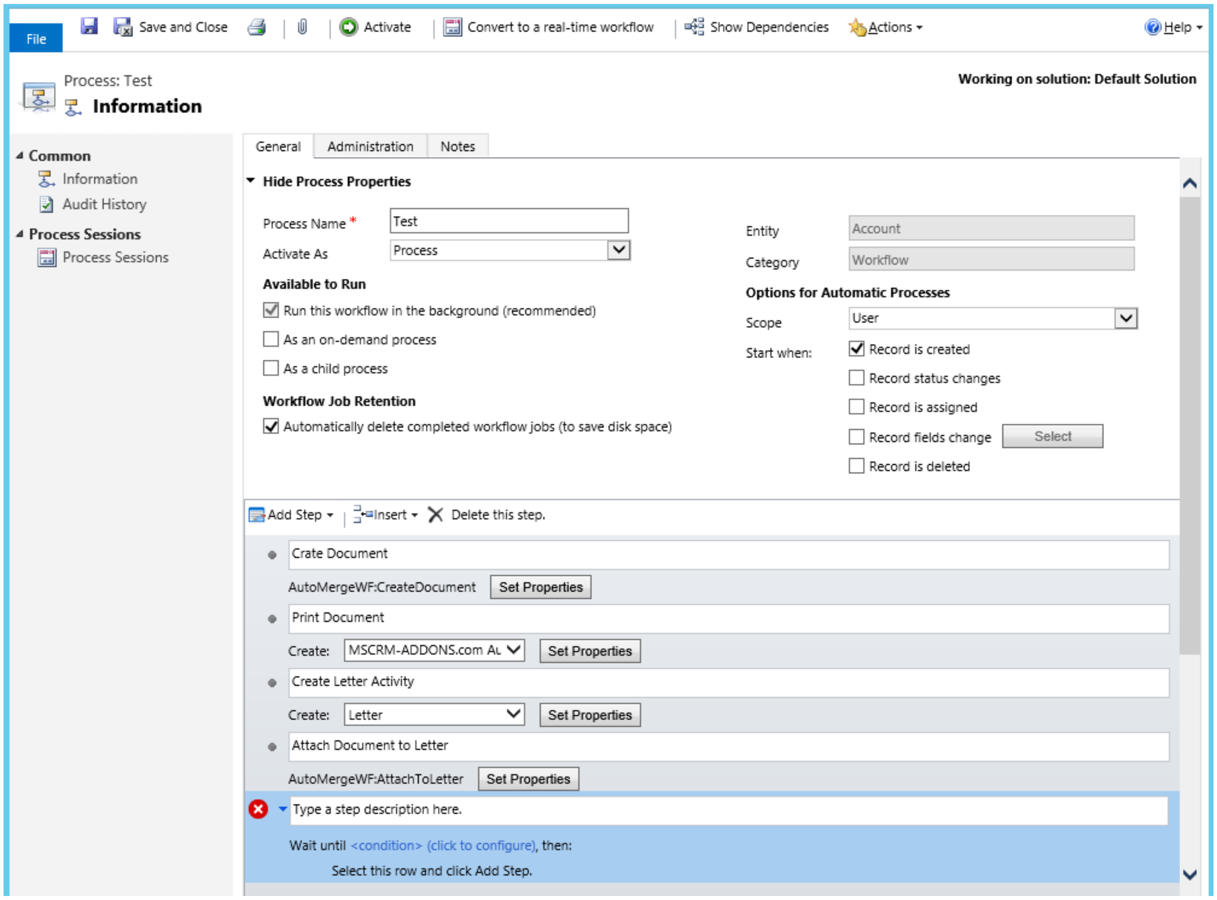


Figure 141: Completed workflow with wait-condition

7.15 How to activate debugging for DocumentsCorePack Server for MS Dynamics CRM 2015

This step-by-step tutorial describes how to activate debugging for DocumentsCorePack Server for Microsoft Dynamics CRM 2015. Basically, there are two possibilities to enable debugging.

SOLUTION 1: Activate file debugging by using the DCP SB configuration (Recommended).
SOLUTION 2: Activate debugging by using the DCP SB configuration.

7.15.1 Solution 1

Navigate to *Settings* -> *Solutions* and double-click on *AutoMergeServerCore*.

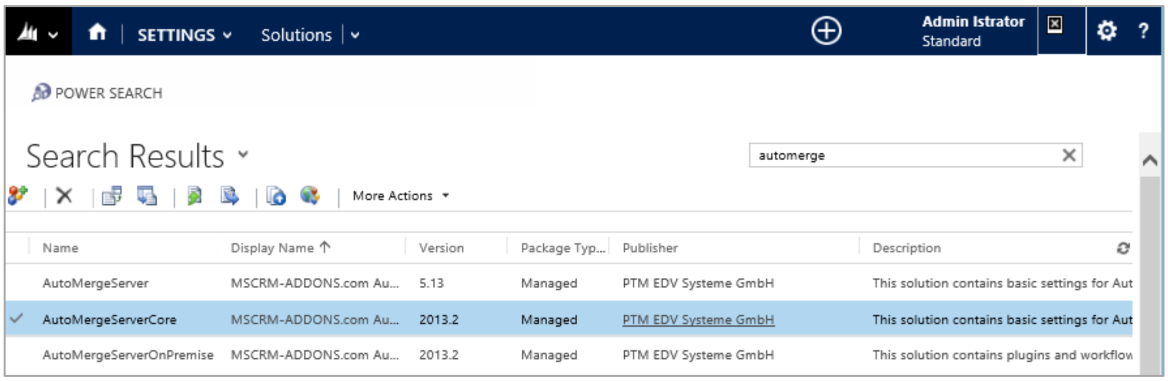


Figure 142: Open AutoMergeServerCore

In the DCP SB Config check *Active Debugging* and *Active File Debugging*. Click on the ***[Save]***-button to finish.

Figure 143: Debugging

File-debugging is now active and the log files will be saved in the "log"-folder in your DocumentsCorePack installation-folder.

Navigate to the installation-path of DocumentsCorePack and send the files in the "log"-folder with an error description to our support address (support@mscrm-addons.com).

Example: *C:\Program Files (x86)\PTM EDV-Systeme GmbH\AutoMerge for Microsoft CRM 2011\log*

7.15.2 Solution 2

Navigate to *Settings* -> *Solutions* and double-click on the *AutoMergeServer*-solution.

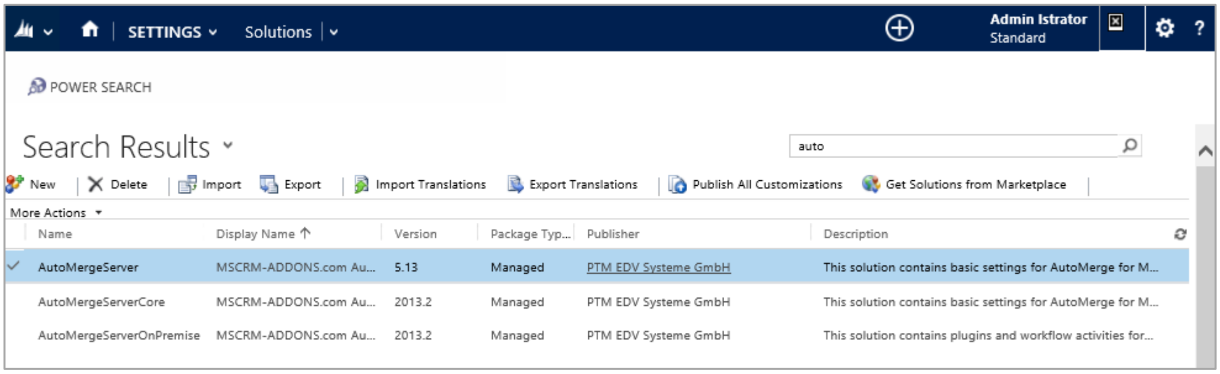


Figure 144 Open AutoMergeServer

Now the configuration page of DocumentsCorePack ServerBased opens.

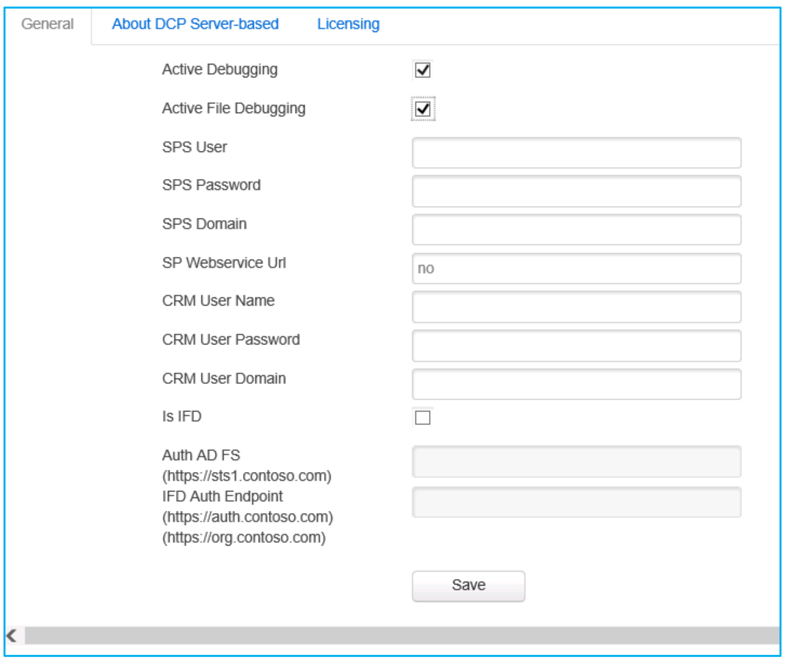


Figure 145: AutoMergeServer debugging

Check *Activate Debugging* and click on the ***[Save]***-button.
From now on, debugging is activated.

8 Advanced DocumentsCorePack Server Based options and configurations

This chapter explains the theory behind how to print documents with DCP Server. It deals with the prerequisites, namely to install and add a printer before using it with DCP Server, the specific settings for plug-in-based printing and the procedure of service-based printing.

8.1 Prerequisites before using a printer with DCP Server

With DCP Server for MS Dynamics CRM 2015/2016 MS Dynamics 365 On-Premise/Online, you are able to print the dynamically generated document automatically to a specific printer.

Before you can start to use this functionality, there are several things to do. Because DCP Server runs as service with a service user, you have to install the printer as described in the steps below to ensure that the service user has access. Please have a look at chapter 7.9 HOW TO INSTALL A PRINTER WHICH IS VISIBLE FOR SERVICES 108 in our How To – section to get more information on how to install a printer.

8.2 Specific settings for plug-in based printing (depreciated)

With DCP Server for Microsoft Dynamics CRM 2015/2016 MS Dynamics 365 On-Premise/Online, you are able to print the dynamically generated document automatically to a specific printer. Sometimes, the printer settings regarding trays, duplex, size, etc. are not applied if you define them using a specific user account because the service runs under different user accounts. In order to avoid this, DCP Server offers you the possibility to define specific printing options in the workflow itself.

The table below lists all special settings which you can define for the printer in the workflow. To make use of them, you just have to add the options you need when entering the printer name in the workflow-configuration. Of course, you can also combine settings, like in the following example:

HP2025|copycount=2|tray=3

The settings listed below are valid for plug-in based printing processes only.

AVAILABLE SETTINGS FOR PLUG-IN BASED PRINTING PROCESSES WITH DCP SERVER

NAME	POSSIBLE VALUES	DESCRIPTION
mediasize	a3 a3rotated a4 a4rotated a5 a5rotated a6 a6rotated	If you have a specific mediasize you can use this setting. For example: HP2025|mediasize=a4
copycount	1-999	Define how many copies you want to have. For example.: HP2025|copycount=4
duplex	onsided twosidedlongedge twosidedshortedge	For printers which are able to print two-sided you can use this option.
outputcolor	grayscale color monochrome	Define the color using this setting.

tray	1-99	Each tray has a number and the first tray is normally auto select. In most cases, you have to try the different numbers to find out which number refers to which tray. e.g.: HP2025|tray=2

Figure 146: Table: Settings for plugin-based printing

8.3 Service-based printing with DCP Server

DCP Server offers a service-based printing option which is available additionally to the already known plugin-based printing-option. The additional option is available within DCP Server for MS Dynamics CRM 2011 v5.30 and higher and is based on a service which is running in the background.

This sub-chapter covers the following essential topics:

- Creation of a service for printing documents
- Adding the service-based printing step to a workflow or dialog
- Exception 1: Adding the service-based printing step to already existing workflows
- Exception 2: Adding the service-based printing step to workflows including a 'Delete Document'-step

Before you continue reading, please make sure that you have installed DCP Server v5.30 or higher. Since version 5.38, DCP Server Printing-Feature provides the possibility to create and manage Printer Configurations for:

- starting **local print jobs** via **DCP Server Local Printer Configuration**

  supported format:
  - *.pdf*

- starting **global print jobs** over internet via **Google CloudPrint Configuration**

  supported formats:
  - *.docx*
  - *.pdf*
  - *.html*
  - *.jpg*
  - *.bmp*

Before you can add the service-based printing to a workflow, you need to configure and start a service. Please learn how to do so in CHAPTER 7.10 HOW TO CONFIGURE AND START A PRINT SERVICE ON PAGE 109.

8.4 DCP Server Printer Tab Overview

The DCP Server Printer Tab is available since v5.34. The below screenshot shows an overview of the printer configurations for CRM:

1. GOOGLE CLOUDPRINTING CONFIGURATION
2. PRINTER 1+2: LOCAL PRINTER CONFIGURATION

The following actions can be applied:

3. CREATE PRINTER CONFIGURATION
4. EDIT PRINTER CONFIGURATION
5. COPY PRINTER CONFIGURATION
6. DELETE PRINTER CONFIGURATION

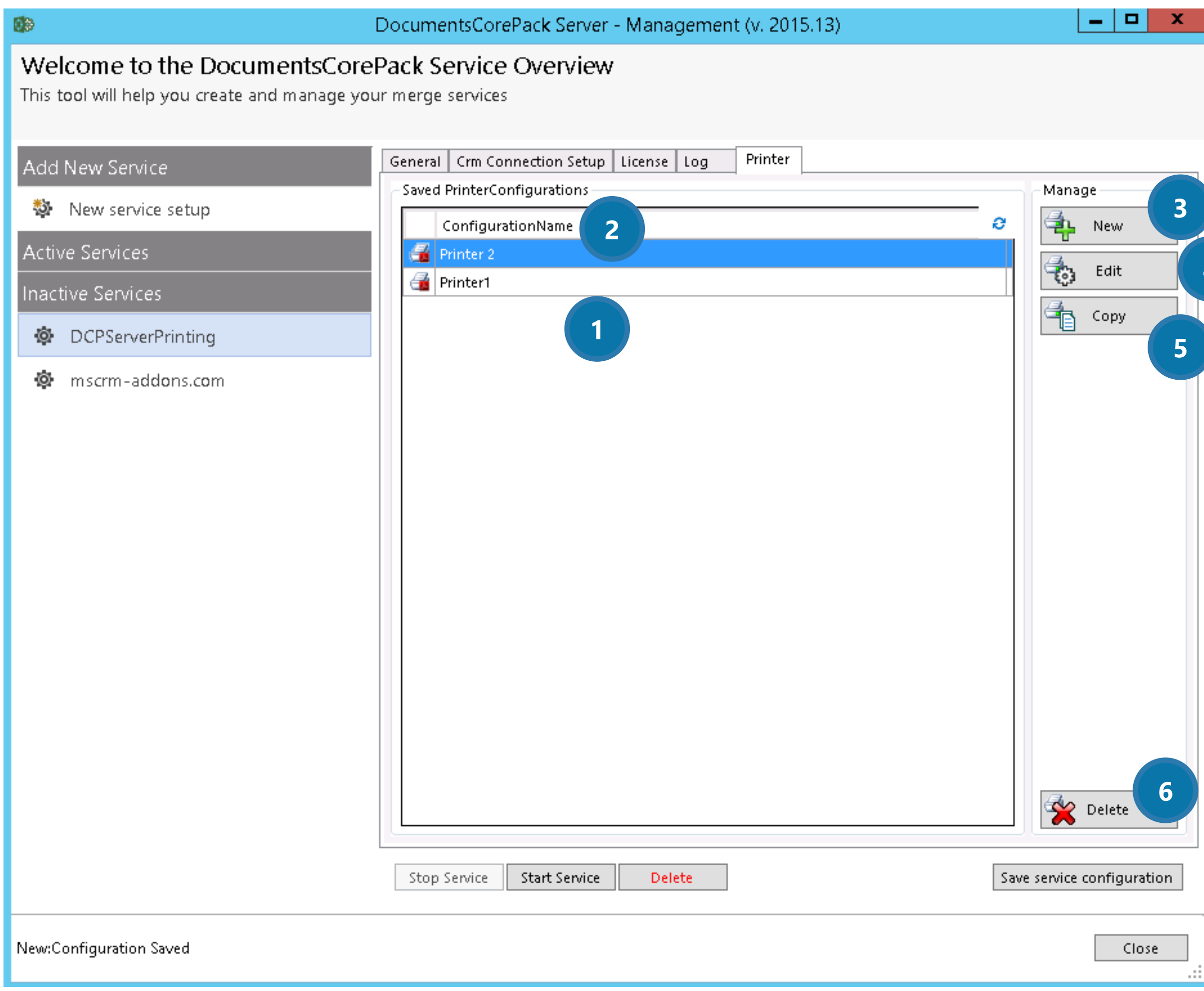


Figure 147: DCP Server Printer Tab Overview

8.5 Local Printer Configuration

The local *Printer Configuration* supports user defined printer settings used for local print jobs.

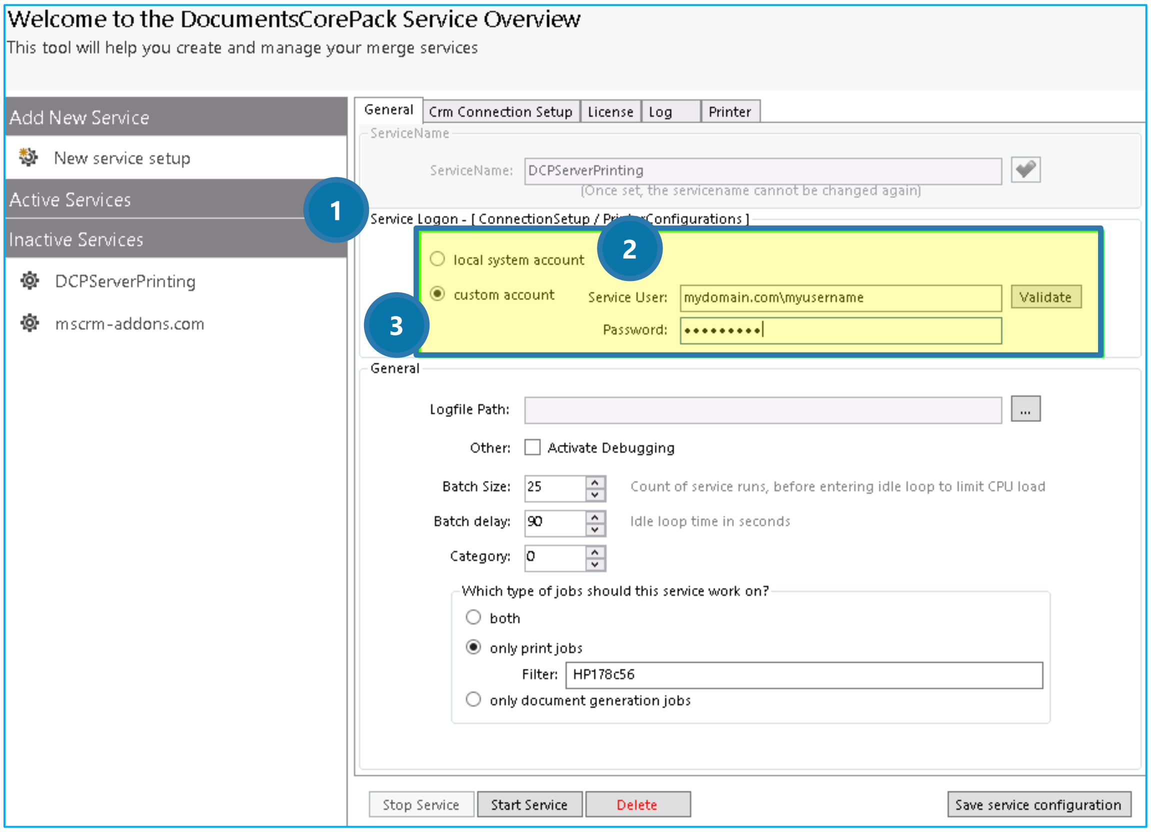


Figure 148: Local printer configuration

1 Service Logon:

Here you can specify the user that should be running the service on your system. The choice of the user context will influence the setup and behavior of the printers.

Authentication Types:

2 Local systems account

Running under the local system account requires to setup printers as local printers.

A local system account will see only local printers; while you're currently logged on user account will also see the network and remote printers.

❸ Custom account:

Using a custom account will enable the service to use the printers as if that user was logged on. The user doesn´t have to be a Dynamics 365 user. The Dynamics 365 access happens via the user who is registered on the Connection tab.

If your credentials change, your existing configurations might become invalid or behave differently! It is recommended to check the existing Local Printer Configurations to ensure that they are also compatible with the modified user.

8.6 Google CloudPrint Configuration

The Google CloudPrint Configuration supports **internet-based print jobs** of DocumentsCorePack ServerBased via internet using printers added to a google-account. The document to print is sent to a Google service together with Google CloudPrint Configuration and then forwarded to your chosen Printer.

The advantage of this kind of printer configuration is that it can be used to start print jobs globally.

Before you can use this feature, you have to add printers to your Google-account. You can connect any number of printers to Google CloudPrint.

Please read the official information about Google CloudPrint before using DocumentsCorePack ServerBased for creating any Google CloudPrint printer Configurations and before starting any print job via Google CloudPrint:

https://www.google.com/cloudprint/learn/?hl=en
https://developers.google.com/cloud-print/

8.7 Printer Configuration Details and Printer Capabilities

You can create, edit and save your existing configuration. The picture below displays the Capability Settings of a selected printer from a Local Printer Configuration. The same scenario applies to a Google Cloudprint Configuration.

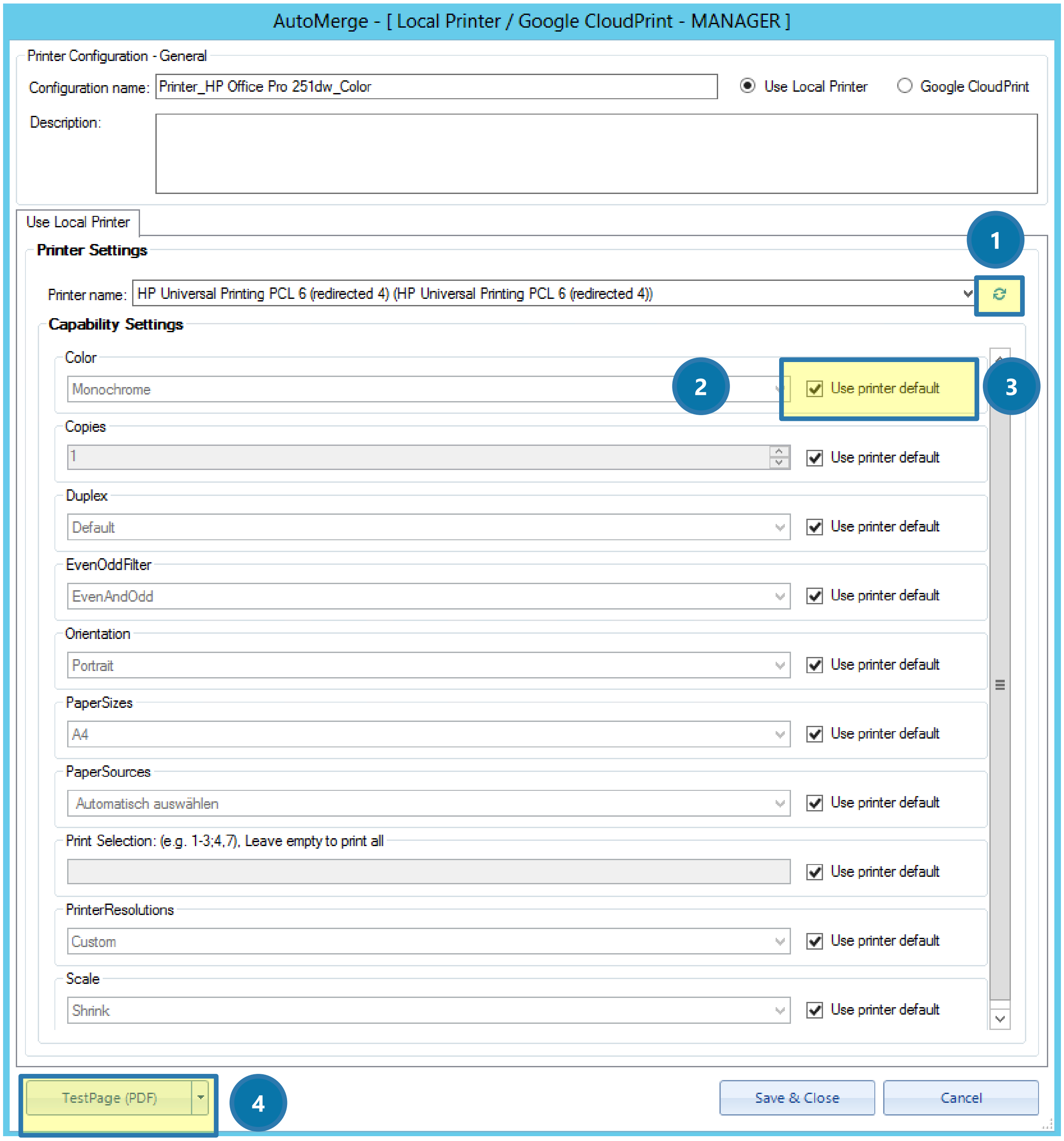


Figure 149: Printer configuration details and capabilities

❶ Press the reload-button for refreshing the list of available printers.

❷ Leaving the printer default enabled will use the printer default at the time of the print process.

The default value displayed in the drop-down section is not necessarily the default value used while printing, as the default value is depending on the user running the service and printer driver setup at the time of printing.

❸ Unchecking the default option will set the selected value on any print, regardless of the user running the service and printer driver setup at the time of printing. Example: set Monochrome printing.

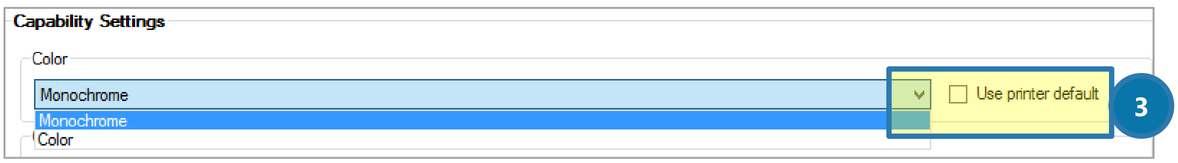


Figure 150: Capability settings

❹ Print test .pdf-pages using the displayed configurations to verify your printer settings and its functionality.

8.7.1 Other types of capabilities:

Numeric-specified Capabilities (set / type in a number):

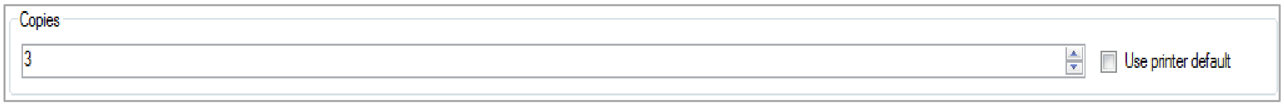


Figure 151: Numeric-specified capabilities

Text-specified Capabilities (type in a text):

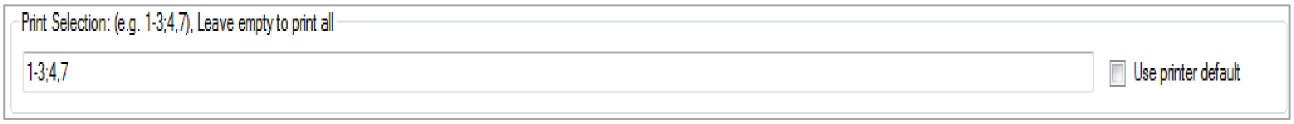


Figure 152: Text-specified capabilities

Local Printer Configurations have a fixed set of printer capabilities. The availability depends on the features of the printer itself:

- Color
- Copies
- Duplex
- EvenOddFilter
- Orientation
- PaperSizes
- PaperSources
- PrintSelection
- PrinterResolutions
- Scale

Google CloudPrint Configurations have a varying set of printer capabilities, based on the installed driver. Each Google Cloud printer can have completely different capabilities. Have a look at chapter 7.11 How to create a Printer Configuration on page 114.

8.8 Troubleshooting on Printers

PROBLEM	SOLUTION
No printers fetched on creating a new configuration in Local Printer Mode 1.2.2 Google CloudPrint.	Verify that printers are available on: • your locally logged-in user, if you chose *local system account* in the General Tab, or on • your custom typed in user, if you chose *custom account* in the General Tab. Also try to click on the ***[Validate]***-button to validate your credentials.
No printers fetched on creating a new configuration in Google CloudPrint Mode.	Verify your google-credentials and that printers were successfully added to your Google-account. You can add printers to your Google account by using Google Chrome Browser, but you can also see your added printers if you are simply logged in with your Google account online, without using DocumentsCorePack ServerBased. If you have done everything mentioned before, you should be able to fetch printers via clicking the ***[Get Printers]*** button. Please find some detailed information here.
A currently added Printer is not available on creating new or edit Local Printer Configuration.	If you have problems with your Local Printer Configuration: • Verify that printers are available on your locally logged-in user if you chose *local system account* in the General Tab (Service Logon area). • Verify that printers are available on your custom typed in user if you chose *custom account* in the General Tab (Service Logon area). If you have added a printer while running DCP SB, try to press the ***[Refresh]***-Button next to the ComboBox. When everything is done the ComboBox should display all the available printers.

Figure 153: Table: Troubleshooting on Printers – Part 1

PROBLEM	SOLUTION
Printer is not available on creating new or edit Google CloudPrint Configuration.	If you have problems with your Google CloudPrint Configuration: • Verify your Google-credentials and that printers were successfully added to your Google-account. You can do this by using Google Chrome Browser**,** but you can also see your added printers if you are simply logged in with your Google account online, without using DCP SB. If you have done everything mentioned before, you should be able to fetch printers with a click on the ***[Get Printers]***-button. Please find some detailed information here**.**
Service Configuration cannot be saved after supplying a custom login.	Saving is only possible with valid credentials. Please make sure your user is logged-in one of the following formats • domain\user • user@domain Please make sure you are still using the same logon as you did when you created the printer.
My printer is missing capabilities or cannot be loaded anymore when trying to edit	If the driver has been modified, it might have changed the available capabilities. Either use a different driver or check, if you can find the desired option on the printer configuration of windows. Not all options available on the driver might be accessible for external applications. For more detailed explanation about changing credentials go to the local Printer Configuration.

Figure 154: Table: Troubleshooting on Printers – Part 2

9 List of figures

10 Glossary

Attribute
An attribute is a container for a piece of data in an entity. Microsoft Dynamics CRM/Dynamics 365 supports a wide variety of attribute types.

SharePoint
SharePoint is a web application platform in the Microsoft Office server suite. SharePoint combines various functions. In combination with Microsoft Dynamics CRM/Dynamics 365 the document management is in focus.

SharePoint Metadata
The document management capability of SharePoint allows you to define

CRM MetaData
Microsoft Dynamics CRM 2016, Microsoft Dynamics CRM Online and Dynamics 365 uses a metadata driven architecture to provide the flexibility to create custom entities and additional system entity attributes. This structure also makes upgrades and the transportation of customizations easier. The data structure can change without requiring any change to code in the Microsoft Dynamics CRM/Dynamics 365 server or client applications.

Relationship
A relationship defines an association between two entities: one-to-many, many-to-one, many-to-many, and self-referential.

Entity
An entity is a container for data, similar to a table in a traditional database. Each entity contains a set of attributes. For Microsoft Dynamics CRM/Dynamics 365, there are a set of entities that exist when you first install. Some of these are customizable. In addition, you can create custom entities to contain business data.

Form Fields
https://msdn.microsoft.com/en-us/library/gg309434.aspx

Watermarks
Watermarks are text or pictures that appear behind document text. They often add interest or identify the document status, such as marking a document as a Draft. You can see watermarks in Print Layout view and Full Screen Reading view or in a printed document.
(Source: https://support.office.com/en-us/article/Insert-a-watermark-or-change-a-watermark-f90f26a5-2101-4a75-bbfe-f27ef05002de)

11 Contact

For further technical questions, please visit our blog http://blogs.mscrm-addons.com
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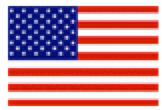

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