

WordMailMerge for MS CRM 3

Users's Guide (How to use WordMailMerge for MS CRM 3)

Users Guide WordMailMerge_V2.64.doc4



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1 USERS GUIDE

Introduction

WordMailMerge for MS CRM 3 is a Microsoft CRM Add-On which gives you two possibilities of how to use it.

- 1. Make mail merge in MS Word with many records.
- 2. Make a mail merge with one record directly out of the web client.

But first of all we want to show you how to create WordMailMerge templates.

2 WordMailMerge Templates

WordMailMerge Templates are predefined Word Templates which have some mail merge fields in it. For each MS CRM Entity (e.g. account, contact,...) you can define different Templates.

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

The installation of WordMailMerge includes this "Account reconnect" template. Test this behaviour and open an account in the Web Client and click on the "Print in Word" Button.

How to create WordMailMerge Templates

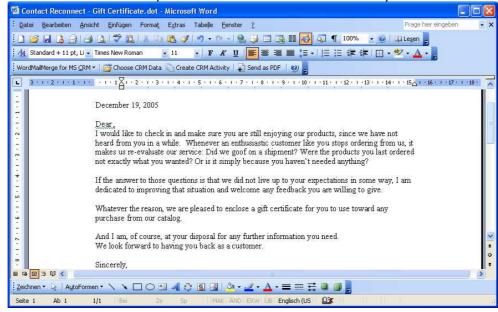
Read the "Getting Started" – Document to get more information about the creation of WordMailMerge Templates.

With the following steps you can create a WordMailMerge Template:

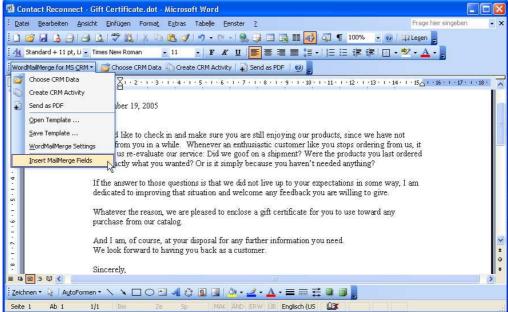
1. Start MS Word



2. Write the content or open a document with the content you need.

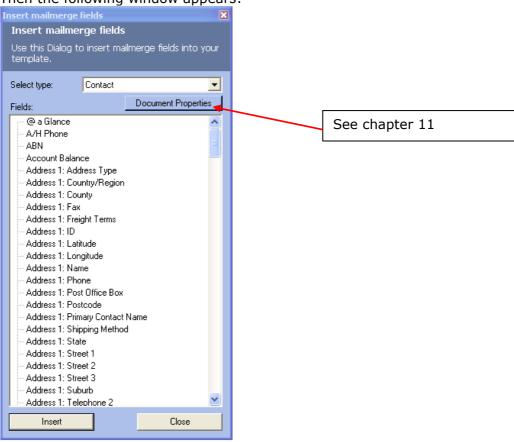


3. As next step we add the MS CRM fields to the content. To do this we have to open "WordMailMerge for MS CRM"->"Insert MailMerge Fields"







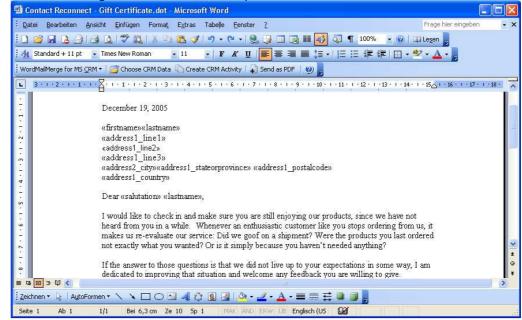


First select the type of template you want to generate. For each type of entity there are different mail merge fields and so when entity "Contact" is selected this template will only work with "Contacts". In our example we select "Contact"

With a double click on the different fields or by selecting fields and clicking on insert you can add fields to your template



5. After inserting some fields the template should look like this:



6. As next step we have to save the template with "WordMailMerge for MS CRM"->"Save Template"

₽ <u>4</u>	Standard + 11 pt 🛛 🝷 Times I	New Roman		
Wor	dMailMerge for MS <u>C</u> RM 🕶 🗌 📂	Choose CR		
F 📂	Choose CRM Data	1 1 2 1		
6	Create CRM Activity			
₽	Send as PDF	1ber 19,		
	Open Template	ame»«la		
	Save Template	ess1 lin	🕎 Open Template	1
	<u>W</u> ordMailMerge Settings	551_mic	Save Template	
	Insert MailMerge Fields	ess1_lin _ss2_city	Insert MailMerge Fields	
4	wadd:	ress1_cou	Templates	(office 2007)



7. Enter the Name of the template in the following window:

OpenTemplate			
Open template			
Use this Dialog to select a Word-Template f	or your MailMerge.		
Select type: Centiet	*	-XX	
General My Templates			
Description			
Description			
Ternsplatenserier		Save	Cancel
1			

In this window you can enter the name of the template you generated and also you can define in which group the template should be saved. If you save the template in the "My Templates" group it will not be possible for other users to see this template.

Other possibilities in this window:

- generate new groups
- delete groups delete templates



Now open the MS CRM Web Client and select a contact

Elle Actions Help					
🛃 🛃 Save and Close 📓	Send E-mail	🔋 🌏 Follow Up 🍓 Reports	Print in Word		
Contact: M[ller, Peter			Print in Word		
Details:	General Details A	Immistration Notes			
More Addresses	Salutation	1	Business Phone	+431001212	6
Lo History	First Name	Peter	Home Phone		
Sub-Contacts Relationships	Middle Name		Mobile Phone		
Sales:	Last Name	Miler	Fax		
Opportunities Quotes	Job Title	1	Pager		
Orders Invoices	Parent Customer	Diestfema	E-mail		
Service:	Address	a testing and the		-	
Cases	Address Name	Standard Address	ZIP/Postal Code		
B Marketing:	Street 1	Strasse	Country/Region		
Marketing Lists	Street 2		Phone		
	Street 3		Address Type		*
	City		Shipping Method	1	
	State/Province		Freight Terms		
	Carden (Product)		al contraction	10	
Status: Active					
Fertig				🕑 Vertrauenswü	rdige Sites

8. Click on the "Print in Word" Button and you will see your generated template

lect Template : ou have to choose a template for the MaiMerge.	
General My Templates	
Contact Reconnect	
U	
-	4

- 9. Select the created template and click "OK". As a result you will get a letter where your defined mail merge fields are filled with data from the MS CRM Contact you selected.
- 10. To create a letter activity in MS CRM with the created template click on the "Create CRM Activity" Button in MS Word. The content of the MS Word – document will be automatically used as a description. For a detailed description of this feature go to the next chapter.



3 3 Create a mail merge with one record

Features

With the **WordMailMerge** you can directly start to merge one contact, account, ... with a template from the **web client.**

In this example we will merge the data of a MS CRM quote with a template which comes with the WordMailMerge Server Components. This example works in the same way for leads, contacts, ...

It should show you how simple it is to take a quote with all data, also **custom fields,** and generate a Word Document. At the end we write back the generated document to MS CRM and also show you how to send this as PDF to your customer.

Prerequisites

Client: WordMailMerge Client Component for MS CRM 3

Server:

WordMailMerge Server Component for MS CRM 3



3.3 Step-by-Step description

Step 1: Open a quote and click on the new button 'Print'

The Administrator can define how this button is named when he is installing the **Server Component** of **WordMailMerge Add-On**. So the name of the button could be different.

Quote: Road/Tourin	Contraction of the second second	Recalculate Look Up Address		6		
Details: Information Existing Products Write-In Products Cother Contacts Activities History	General Shipping Add Quote ID Name Potential Customer Totals Detal Amount (\$) Quote Discount (%) Quote Discount (\$)	oc Itaes/itaanna dolling	Revision ID Price List	L Wholesale	Form Assistant Potential Customer Look Up Records Look for: Account Active Cycling Active Cycling Active Cycling Advanced Bile Componen Affodable Sports Equipme Affodable Sports Equipme Affodable Sports store Annaing sports store Annaing sports store Annaing biles Anather Bicycle Company Active Diges If the Page 1 Tips This customer will be either the	• • • • •

Step 2: Select a template

A window appears which allows you to select the template you want to use. Choose the "Quote"-template and click "OK"

2



If you receive the following 'Security issue', open the Installation Guide and go to Chapter 1.2.1. There you will find a description of what you have to do, to solve this issue.

Security issue! Please make a screenshot and contact support@mscrm-addons.com to solve the problem!	VordMailMergs Add-On Error	
Please make a screenshot and contact <u>support@mscrm-addons.com</u> to solve the problem! Additional Informations Additional Informations Active-X calls are not allowed! To solve this you have to add the crm-site to your trusted sites in the Internet Options! You will find a detailed description of how to solve this problem in the WordMailMerge documentation! To solve this problem in the WordMailMerge documentation!		
Support@mscrm-addons.com to solve the problem! Additional Information: Active-X calls are not allowed! To solve this you have to add the crm-site to your trusted sites in the Internet Options! You will find a detailed description of how to solve this problem in the WordMailMerge documentation! If you have trushlas to solve this issue contact support#mscrm.	Security issu	uel
Additional Information: Active-X calls are not allowed! To solve this you have to add the crm-site to your brusted sites in the Internet Options! You will find a detailed description of how to solve this problem in the WordHailMerge documentation! If you have troubles to solve this issue contact support@mscrm.	Please make a scree	enshot and contact
Active-X calls are not allowed! To solve this you have to add the crm-site to your trusted sites in the Internet Options! You will find a detailed description of how to solve this problem in the WordhailMerge documentation! If you have troubles to solve this issue contact supportions	support@mscrm-ad	idons.com to solve the problem!
Active-X calls are not allowed! To solve this you have to add the crm-site to your trusted sites in the Internet Options! You will find a detailed description of how to solve this problem in the WordhailMerge documentation! If you have troubles to solve this issue contact supportions		
Active-X calls are not allowed! To solve this you have to add the crm-site to your trusted sites in the Internet Options! You will find a detailed description of how to solve this problem in the WordhailMerge documentation! If you have troubles to solve this issue contact supportions		
To solve this you have to add the crm-site to your trusted sites in the Internet Options! You will find a detailed description of how to solve this problem in the WordNailMerge documentation! If you have troubles to solve this issue contact connect@macros	Additional Information:	
Wiederholen	To solve this you have to ad the Internet Options! You will find a detailed descr the WordMailMerge docume	d the crm-site to your trusted sites in ription of how to solve this problem in Intation!
THESEMOLEN		Wiederholen
		C Predemoter L Laudon



Step 3: Result

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

🖼 Katalog1 - Microsoft Word							
E <u>D</u> atei Bearbeiten <u>A</u> nsicht <u>E</u> infügen Forma <u>t</u> E	tras Tabelle <u>F</u> enster <u>?</u>					Frage hier eingeben	- ×
i 🗅 🞯 🖬 🖪 🖨 🖃 🖓 🖏 🕷 🐘 🕅							
Arial 🔹 1	1 → F K U 📰 🗮 🗮 📜 🗧 🕴		🎼 🗔 🔹 🍕	2 • <u>A</u> •			
🗄 WordMailMerge for MS <u>C</u> RM 🕶 🔤 Choose CRM Data 👘	Create CRM Activity 🙀 Send as PDF 🥑 💂						
L I · 1 · 1 · 2 ·	1 • 3 • 1 • 4 • 1 • 5 • 1 • 6 • 1 • 7 • 1 • 8 • 1 • 9 • 1	• 10 • 1 • 11 •	1 + 12 + 1 + 1	3 * 1 * 14 * 1 * 15 *	1 • 16 • 1 • 17 • 1 • 🛆	1 - 19 -	~
To: North 567 Ke	Quote Quote vind Traders innedy Boulevard Laredo	Your Refe Gail Erick	Austria. Tel: +99 88 Eax +99 88 www.mscm	of your companz			
QuoteNr. 95				Graz, no	vember 30, 2005		
Part Nr	Description	Unit	Quantity	Price (€)	Amount (1)		
	Road-450 Red, 48						
BK-R68R-48	A true multi-sport bike that offers streamlined riding and a revolutionary design. Aerodynamic design lets you ride with the pros, and the gearing will conquer hilly roads.	Single	6,00	1.650,97	9.905,82		
·				Sub Total	9.905,82		
· · · · 2.				Quote	Discount: 213,94		
-				Packaging &	Shipping: 775,52		
				2	Total Tax: 792,35		
<u>-</u>			Total /	Amount for this i	nvoice: 11.259,75		×
Payment con	litions: 2% 10, Net 30						
⊐ ≣ ⊂a 回 3∋ © ≪ Seite 1 Ab 1 1/1 Bei 6,3 cm Ze 1	Sp. 1 MAK ÄND ERW ÜB Niederländis						×



STEP 4 Selecting the WordMailMerge settings

Before creating a Crm Activity please choose in which form the document should be saved! Here you can define between a **Word.doc** and a **PDF file**

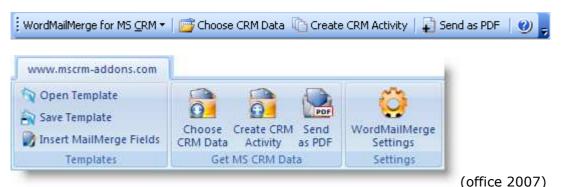
🗘 WordMailMerge Settings			
WordMailMerge Settings			
Change the default settings of Wo	rdMailMerge.		
General PDF Settings	About WordMailM	erge	
Delete PDF after attaching to the	e Email?		
Attach document as PDF to the	activity	Click here to	
		attach Document as	
		PDF file	
PDF Printer:			_
Default Directory for saving the PDI	F-File:		
			[
		эк	Cancel

Step 5: Write back the letter activity to MS CRM

You have two possibilities to write back this letter as activity into MS CRM. It depends on what you want to do.

First solution is to click "Create CRM Activity" - Button. With this button you can create a letter, email or fax activity with this document.

Second solution is to click "Send as PDF" – Button. This button gives you the possibility to create a PDF out of this word document and send it as Email.



We will show you now what happens in detail when you click on "Create CRM Activity" or "Send as PDF".



Step 6a: Click on "Create CRM Activity"

After clicking on "Create CRM Activity" you will get the following window:

Mailmerge for MS CRM 3 Version 2.0.0.22	
Do you want to create an activity ? Subject:	The Subject of the activity you want to create.
Quote	
Options Which activity type should be created? • Letter C Email C Fax	Choose the type of activity you want to create.
Cancel	
attach the	you want to word document the activity.

If you checked the "attach document" checkbox and your word document is not saved, you will get the following message.

Information 🛛 🔀
You only can attach the document to an activity after you saved it! Should WordMailMerge save it for you in the temporary folder?
<u>Y</u> es <u>N</u> o

If you click on "Yes" WordMailMerge will save the document into a temporary folder and attaches this document to your activity.

Since version nr. 2.1.0.11 we implemented a version control. If you want to create an activity with an attached document from which an activity has been created before, you'll see following dialog:





Step 6b: Click on "Send as PDF"

This functionality needs the "Acrobat PDFWriter" , "PDF995" or "PDFcreator"(since WMM v2.1.0.13).

If none of this PDF Creators are installed you will get following message:

WordMailMerge PDF Requirements
This functionality requires Acrobat PDFWriter(www.adobe.com) or PDF995(www.pdf995.com)
You will find detailed information in the install instruction document of WordMailMerge or write a email with your qeustion to support@mscrm-addons.com.
OK

You can define if you want to delete the pdf after attaching it to the e-mail. Further it's possible to define a default location for the generated pdf – files. Therefore you just have to click on "WordMailMerge for MS CRM 3"-> "WordMailMerge settings" -> "Send as PDF".

🛱 WordMailMerge Settings			
WordMailMerge Settings			
Change the default settings of Wor	dMailMerge.		
General PDF Settings	About WordMailMerge		
Delete PDF after attaching to the	Email?		
Attach document as PDF to the a	activity		
PDF Printer:			-
Default Directory for saving the PDF	-File:		
	1 10.		
1			
	ОК	Ca	ancel



First you will be asked for the filename of the PDF you want to generate.

Filename for th	he PDF			2 🔀
Speichem in Zulietzt verwendele D. Desktop Eigene Dateien	Desktop Eigene Date Arbeitsplatz Nietzwerkun			
Netzwerkungeb ung	Dateiname: Dateityp:	PDF files (* pdf)	 •	Speichem Abbrechen

Step 6c: Result

The result is that the following window appears and you can change the recipient, subject, ... before sending the email with the attached PDF.

nail: Unknow	m D	
At least one recip	pient does not have an e-mail address or is marked as "Do Not Allow" e-mail.	
ail Attachments	5	
rom	💲 Christian Terrels. 🔊 😪	
	🕞 Read/Jourina distrina 🖉 😥 Bec	
bject]
	● / 및 副 著 道 日 日 日 日 日 日 日 日 日 日 日 日 日	
(14 (2)	■ / U 副 著 道 三 i三 i戸 i戸 A・A・ G Incert Template 🔔 Incert KB Article	
	● / 史 副 書 書 三 !三 !E !E (第 会・A・ A・ G) Incert Template Incert XB Article	
garding		
garding vner	Band/Touring dothing	
spanding wher aration se	Boad/Touring clothing Scription Terrols	

Change to the "Attachments"-tab and you will see the attached PDF.



nail: Unknown		
At least one recipient does not have an e-mail	address or is marked as "Do Not Allow" e-mail.	
al Attachments		
👔 New E-Mail Attachment 🎯 🗙		
File Name A	File Size	2
Katalogt.pdf	8,055	28

Step 7: Result

After opening the history activities of the quote you will see the new letter activity and that the content of the word document is inserted as description.

oter Doad-	450 Quote		k Up Address 📔 🚮 Print in W	ane:			
	100 Quote						
t ails: Information	New	Activity ᢖ 國 🍰 🗙					
Existing Prod		Subject	Activity Type	Activity Status	Regarding	Priority	Due Date
Write-In Proc Other Contac		Quote	Letter	Completed	Road-450 Quote	Normal	
Activities	🗟 Letter: Quote						
History Items_PTM	Eile Actions Help						
Items	🔀 Close 🛃						
	Letter: Quote						
	Recipient Subject	Quote	Di	rection	C Incoming C Outg	olng	
	Subject						^
	BK-R68R-48 Road-450 Red, 4	8 bike that offers streamlined riding a	nd a revolutionary design. Aerody	namic design lets you	ride with the pros, and	the gearing will cond	guer hilly
	BK-R68R-48 Road-450 Red, 4	bike that offers streamlined riding a	nd a revolutionary design. Aerody	namic design lets you	ride with the pros, and	the gearing will cond	quer hilly
s: Draft	BK-R68R-48 Road-450 Red, 4 A true multi-sport roads. Single	bike that offers streamlined riding a	nd a revolutionary design. Aerody	namic design lets you	ride with the pros, and	the gearing will cond	quer hilly
s: Draft	BK-R68R-48 Road-450 Red, 4 A true multi-sport roads. <u>Single</u> Regarding	bike that offers streamlined riding a		namic design lets you	ride with the pros, and i	the gearing will conc	quer hilly
s: Draft	BK-R68R-48 Road-450 Red, 4 A true multi-sport roads. Single Regarding Owner	bike that offers streamlined riding a				the gearing will cond	quer hilly



Further more you see that your word document is attached as a **doc** or as a **PDF** file.

Here an example for a.doc

🗈 Letter: Quote - Microsoft Internet Explorer	
Ele Actions Help	
🖸 Close 🍙 🦾 Print in Word	
Letter: Quote	
Letter Notes	
Notes	
Cick here to enter a new note	
11/13/2005 9:50 PM by First name Last name	Edited 11/13/2005 9:50 PM by First name Last name
CRMDocument127764210458794463.doc (39,426 Byte(s)) This is sample note text	
	6
Status: Completed	
a) Done	Trusted sites

Here an example for a PDF file

ail: Unknown		
	al address or is marked as "Do Not Allow" e-mail.	
Attachments		
New E-Mail Attachment 📑 🗙		
File Name 🗠	File Size	2
Ketelogt.pdf	8,055	



4 Create a mail merge with many records

Features

The **WordMailMerge Add-On** has following advantages against the standard mail merge functionality:

- Choose which fields you want to use for the mail merge.
- You are able to use **custom fields**, **custom entities**.
- You could make a mail merge also with **nearly every entity.**
- Make the selection of the records in Word. No need for Outlook SFO.
- You are able to search for records thru related entities.(For example you can search for all contacts which have a parent account and this parent account appears to a specific category)
- The **WordMailMerge** gives you the ability to create a mail merge and after that saves the documents to the CRM Object as an outgoing letter activity with the content of the Word-Document as description.
- Send letters as PDF. The new "Send as PDF" button on the Word toolbar, gives you the ability to generate a PDF from a Document you generated with WordMailMerge and send it per Email to somebody.

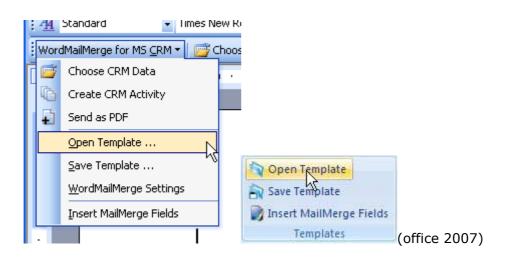
Step-by-Step description

You will now see how simple you could make a mailmerge and how many possibilities you would have when you use **WordMailMerge**.

Step 1: Open Word and choose a template

The templates are separated by entities, this means every template belongs to an entity.

Click on 'Open Template' in 'WordMailMerge for MS CRM'.





💆 OpenTemplate		
Open template		
Use this Dialog to select a Word-Template for your MailMerge.		
Select type: Account		Search
General		
Description		
☑ _blank		
🛃 Account Reconnect		
Contemporary Letter		
Copy of _blank	Choose an entit	у
List of templates for this entity		
	Open Template	Cancel
	New document v	with this template

By clicking [Open Template] the Template itself will be opened (normally a .dot File), so you can change it.

But we want to make a new document, so select the Template you want and then press [New document with this template].



It's also possible to open templates via http. Therefore we have to open the settings and check the "Use http to open templates" – option.

🔅 WordMailMerge Settings	
WordMailMerge Settings	
Change the default settings of WordMailMerge.	
General PDF Settings About WordMailMerge	
Default Entity: Firma	•
Gobal Settings	
C Activate Debugging	
🗖 Add a 'My Templates' Group	
Vise chart names	
□ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □	
Automatically merge to a new Document.	
Default direction for documents added to CRM is 'OUTGOING'	
Default Directory for saving the local Templates:	
Default closed letter status reason: 3	
ОК Са	ncel

Remember, it is not possible to save templates via http. Here we would also recommend our Knowledge base, article : http://support.mscrm-addons.com/default.aspx?kb=10033

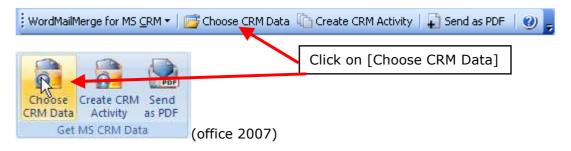
Now a new Word Document with your selected Template will be opened.

Adventure Works Cycle	Street 1 81293 City	
11. November 2005 «name» «address1_line1» «address1_line2»		These are merge fields which will be filled with the data from MS CRM
«address1_line3» «address1_postalcode» «address1_city» «address1_county» Dear Madam or Sir.		
Type your letter here.		
Sincerely,		



Step 2: Choose CRM Data

To choose now the CRM records you have to click on the 'Choose CRM Data'.

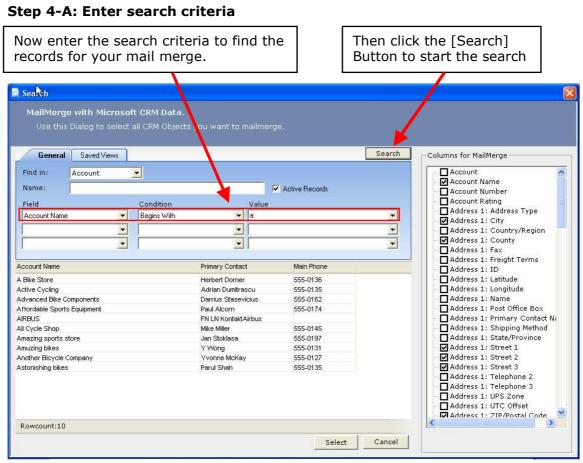


Step 3: Search Window

Now the search window appears.

Search 🕅			
MailMerge with Microsol Use this Dialog to select	t CRM Data. all CRM Objects you want to mailmerge.		
General Saved Views		Search	Columns for MailMerge
Find in: Account	Your selected Entity		Account Account Name
Name: Field	Condition Value	<u> </u>	Account Number Account Rating Account Rating Address 1: Address Type Address 1: City Address 1: Country/Region
ccount Name	Primary Contact Main Phone		 ✓ Address 1: County △ Address 1: Fax △ Address 1: Freight Terms △ Address 1: ID → Address 1: Latitude
			Address 1: Longitude Address 1: Name Address 1: Name Address 1: Post Office Box Address 1: Primary Contact N≀
	All Columns your Template contains are checked automatically.		 Address 1: Shipping Method Address 1: State/Province Address 1: Street 1 Address 1: Street 2 Address 1: Street 3
			Address 1: Telephone 2 Address 1: Telephone 3 Address 1: UPS Zone Address 1: UTC Offset
	Select	Cancel	





Step 4-B: Using Saved Views

Search MailMerge with Microsoft CRM Use this Dialog to select all CRM		ie.	To refresh the list after you changed the view in MSCRM
General Saved Views Type: Account Vame Only Haas Only H ⁴ Only A ⁴		New Edit	Columns for MailMerge
ccount Name	Primary Contact	Main Phone	Address 1: Fax
Bike Store	Herbert Dorner	555-0136	Address 1: ID
ctive Cycling	Adrian Dumitrascu	555-0135	Address 1: Longitude
dvanced Bike Components	Darrius Stasevicius	555-0162	Address 1: Name
ffordable Sports Equipment	Paul Alcorn	555-0174	Address 1: Post Office Box
RBUS	FN LN KontaktAirbus		Address 1: Primary Contact Ne
I Cycle Shop	Mike Miller	555-0145	Address 1: Shipping Method
mazing sports store	Jan Stoklasa	555-0197	Address 1: State/Province
	Y Wong	555-0131	Address 1: Street 1
muzing bikes	Yvonne McKay	555-0127	Address 1: Street 2
nuzing bikes nother Bicycle Company		555-0135	
	Parul Shah	222-0122	✓ Address 1: Street 3 Address 1: Telephone 2



Step 5: select columns for the mail merge (OPTIONAL)

In this step you have to select the columns for your mail merge. This is optional because you only have to make this:

- If you create a really new Document
- if the you need some more/other columns or
- if the user does not need some columns for the template.

Step 6: select the records and click on the [Select] button.

Now we have found the records with the selection criteria you have entered and selected the columns for your mail merge.

As next step select the records for the mail merge and click the [Select] button.

🖾 Search				
MailMerge with Microsoft (Use this Dialog to select all		nailmerge.		
General Saved Views	5		Search	Columns for MailMerge
Find in: Account		Active Records		Account Account Name Account Number Account Rating
Account Name	Begins With 📃	Value a		Address 1: Address Type
	×		·	Address 1: Country/Region
Account Name	Primary Contact	Main Phone		Address 1: Freight Terms
A Bike Store Active Cycling Advanced Bike Components Affordable Sports Equipment AIRBUS All Cycle Shop Amazing sports store Amuzing bikes Another Bicycle Company Astonishing bikes	Herbert Dorner Adrian Dumitrasi Darrius Stasewi Paul Alcorn FN LN KontaktA Mike Miller Jan Stoklasa Y Wong Y Vonne McKay Parul Shah	cius 555-0162 555-0174 irbus 555-0145 555-0145 555-0197 555-0131		 Address 1: Latitude Address 1: Longitude Address 1: Name Address 1: Nost Office Box Address 1: Primary Contact Ni Address 1: Shipping Method Address 1: State/Province Address 1: Street 1 Address 1: Street 2 Address 1: Street 3 Address 1: Street 3 Address 1: Telephone 2 Address 1: UTC Offset
Rowcount:10		Sel	ect Cancel	Address 1: ZIP/Postal Code



Step 7: change the template (OPTIONAL)

You are now back to the previous selected template. You can now change this template if necessary.

In our example we want to add the web site to the template.

For that we go to the end of the line `<<address1_County>>' and press Enter. Then click the button `Insert Merge Fields'.

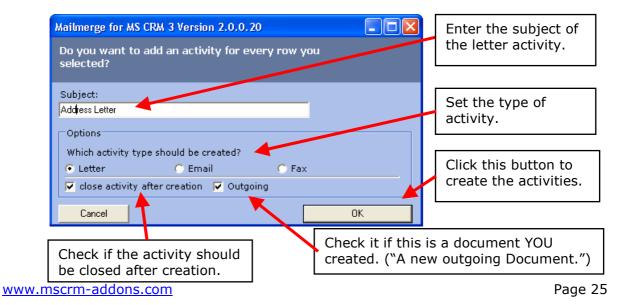
	Insert Word Field 🕇 🛛 🞎	日相日	M 4 1	NAN
				6
Click the butto	on <mark>'Insert</mark> Merge Fiel	ds'.		1

As next you will see the window 'Insert Merge Fields'. Select the 'accountid' and click on the 'Insert' button and then on the 'cancel' button.

Insert Merge Field 🛛 🔀
Insert: <u>A</u> ddress Fields <u>Fi</u> elds:
accountid name address1_city address1_county address1_line1 address1_line2 address1_line3 address1_postalcode id LastItem
Match Fields Insert Cancel

Step 8: Click on the [Create CRM Activity]

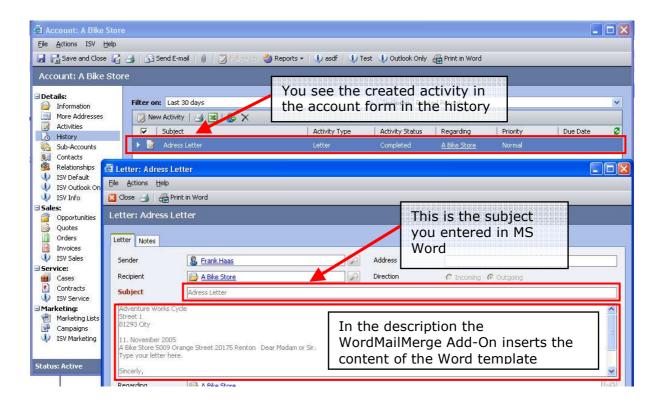
With this button you have the ability to write the letter activities back into the MS CRM exactly in the accounts you have selected for this mail merge. You can enter the subject of the activity and if the activity should be closed or not.





Step 9: Result

When we now open one of the selected accounts and going to the activities and select the history tab we see the new activity the **WordMailMerge Add-On** created.





5 Generate a Newsletter and send it per Email

Features

The advantage of using this way to send Emails to CRM-Contacts or Accounts is that you can attach files to these Emails.

Step-by-Step description

Step 1: Generate a template

As first step you have to generate a word template for your Newsletter. (go to chapter 2).

IMPORTANT: The template has to have the field "E-Mail" in its text. (You can inserts fields with "Microsoft CRM" -> "Insert MailMerge Fields.")

If you do not want the email to be in the text of the newsletter then you can add it as an "Additional Field" (see: 11, Tappage 2, Additional Fields) but it has to be some where in the template.

Step 1: Choose Data

To choose the CRM records for your newsletter you have to click on the `Choose CRM Data'.

Choose CRM Data Get MS CRM Data Ctep 2: Search the con	(office 2007)		y 🚅 Send as PDF 🥑 🥫 ose CRM Data]
Enter search criteria to (We need a list of ema	o find the reco	ords.		Then click the [Search] Button to start the search
Search MailMerge with Microsoft CRM Data Use this Dialog to select all CRM Obje		18.		×
General Saved Views				
Find in: Account Name: Field Sendition		Active Records	Search	Columns for MailMerge
Find in: Account		Active Records	Search	Account Anne Account Name Account Number Account Rating Address 1: Address Type Address 1: Country/Region Address 1: Country/Region
Find in: Account Name: Field Condition Do not allow Mails Does Not Eq	ual			Account Name Account Number Account Number Account Rating Address 1: Address Type Address 1: Country/Region Address 1: Country/Region Address 1: County Address 1: Frax Address 1: Frax
Find in: Account Name: Find BoundMise Do not allow Mails Does Not Eq	ual 💽	Main Phone 555-0136 555-0135 555-0145 555-0145 555-0145 555-0131 555-0131 555-0131 555-0135 555-0116 555-0116 555-0118 555-0178		Account Name Account Number Account Rating Address 1: Address Type Address 1: Country/Region Address 1: Country/Region Address 1: County

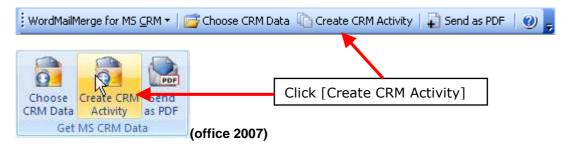


Step 3: Select the contacts or accounts

IMPORTANT: The newsletter will be send to the Email-address of the contact or account. For this you have to select in the right list box the column for 'E-Mail'. You can not change the behavior so that the **WordMailMerge** uses another field.

📮 Search			
MailMerge with Microsoft CRM Use this Dialog to select all CRI		je.	
General Saved Views			Search Columns for MailMerge
Find in: Account			Account
Name:		Active Records	Account Name
E al a			Account Number
A DESCRIPTION OF A DESC	dition Value Not Equal		Address 1: Address Type
	· · · · · · · · · · · · · · · · · · ·		Address 1: City
	<u> </u>		Address 1: Country/Region
			Address 1: County
			Address 1: Fax
Account Name ¥	Primary Contact	Main Phone	Address 1: ID
A Bike Store	Herbert Dorner	555-0136	Address 1: Latitude
Active Cycling	Adrian Dumitrascu	555-0135	Address 1: Longitude
Advanced Bike Components	Darrius Stasevicius	555-0162	Address 1: Name
Affordable Sports Equipment	Paul Alcorn	555-0174	Address 1: Post Office Box
AIRBUS	FN LN KontaktAirbus	AND SKI CYLL	Address 1: Primary Contact Na
All Cycle Shop	Mike Miller	555-0145	Address 1: Shipping Method
Amazing sports store	Jan Stoklasa	555-0197	Address 1: State/Province
Amuzing bikes Another Bicycle Company	Y Wong Yvonne McKay	555-0131 555-0127	Address 1: Street 1
Astonishing bikes	Parul Shah	555-0135	Address 1: Street 3
Basic Bike Company	Allison Brown	555-0116	Address 1: Telephone 2
Best o' Bikes	Anna Bedecs	555-0135	Address 1: Telephone 3
Bicycle Accessories and Kits	Laurence Varlet	555-0171	Address 1: UPS Zone
Big-Time Bike Store	Forrest Chand	555-0178	Address 1: UTC Offset
			Address 1: ZIP/Postal Code
Rowcount:132			
		Select	Cancel
1) Select the records.			2) Click the [Select] button
I) Select the recolds.			

Step 4: Click CRM MailMerge



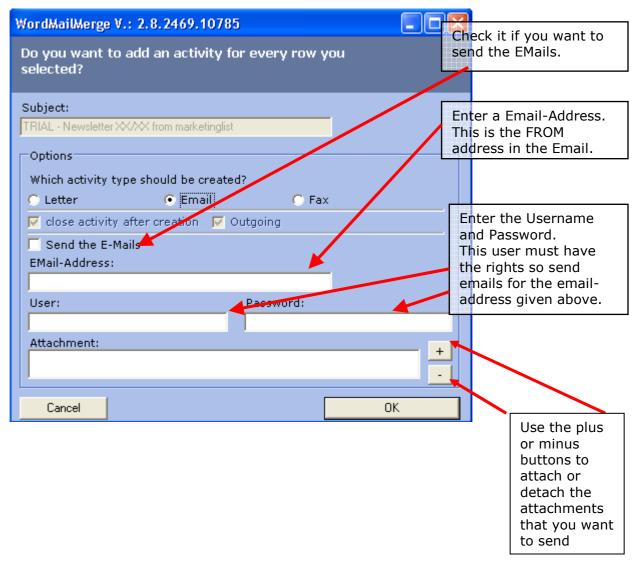


Step 5: Click the checkbox "Send the E-Mails" and enter the email address, user and password

To send now the emails and write the activities you have to check that as activity type **Email** is checked.

IMPORTANT: If you do not select the checkbox **Send the E-Mails** the WordMailMerge only generates the activities in CRM but will not send the Emails. **IMPORTANT:** The Email-address, User and Password field gives you the ability to send the newsletter with a different email-address. (For e.g. if you want to sent it as *office*@mail.com.) This field will be checked with the entries in the Exchange server. Should you want to send your email under a different name then this also possible here. Before entering the email address, insert a name like in the example : "OFFICE (MSCRM ADDONS)" <office@mscrm-addons.com>! You can enter any name between the "...."If the user does not have the right to send with this email-address you will get an error.

IMPORTANT: You can define any amount of attachments which will be sent with the emails. These attachments will only be attached to the email and not to the CRM-Email-Activity.



Step 6: Click [OK] to send the emails and create the CRM-activities.



6 Create a Mail with one record

Step 1: Make sure that the WordMailMerge settings are set before you create the document!

🗘 WordMailMerge Settings	
WordMailMerge Settings	
Change the default settings of WordMailMerge.	
General PDF Settings About WordMailMerge	
Default Entity: Adresse	
Gobal Settings Gobal Settings Activate Debugging Add a 'My Templates' Group	
 Use short names Use http to open templates. Automatically merge to a new Document. Default direction for documents added to CRM is 'OUTGOING' 	This box must not be checked for this procedure
Default Directory for saving the templates locally:	
Default closed letter status reason: 3	
ОК	Cancel

After creating the document pressing print in word, and choosing the Template, You will receive the next message box :



Click No to create an Email.



Step 2: Then choose the CRM Activity

WordMailMerge V.: 2.8.2469.10785	
Do you want to add an activity for every row you selected?	•
Subject: TRIAL - Newsletter XX/XX from marketinglist Options	Make sure that the right box is clicked!
Which activity type should be created? C Letter • Email • Fax ✓ close activity after creation ✓ Outgoing	
Send the E-Mails EMail-Address:	
User: Password:	
Attachment:	+
Cancel	ок

Step 3: The next dialog is the following :"Choose Email Field". This Field should be shown on the list if you have already inserted the Email field in your document!

🖶 Choose Email field	
Choose the Email field:	
createdon freightamount paymenttermscode quoteid discountamount quotenumber totalamount totalineitemamount totalineitemamount totalax contact_contactid contact_fullname customerid_account_name customerid_account_address1_city customerid_account_address1_country	
Cancel	ок

Should the Email field not appear in this box you can insert it as shown in part 9 document properties.:



E-mail property

See: 12 Document Properties, Tabpage 2, Email

7 E-mail Delivery Report

After sending a newsletter you will see a list of failed and a list of successfully sent emails. The reason why a send process failed is when the email field in CRM is empty. For such a record no activity will be generated. To find such a record all information of the record from the template regarding this record will be shown to make it easier to find it.

🙀 DeliveryReportDialog	, k		×
E-mail Delivery Rep This Dialog shows yo sending process.		ne email	
Failed			
; {F049F6B8-AB4F-DC11 ; {066D07E7-DA61-DC1 ; {FC6DAC4F-9862-DC1 ; {9E28B681-9C62-DC11	1-99E3-0003FF5E9E2 I-99E3-0003FF5E9E2	28}; Test; No Email Addres 28}; Test; NOEMAIL1; ;	:5;.
Details:			
Successful			
martin.wilhelmer@ptm-ed martin.wilhelmer@ptm-ed martinwilhelmer@gmx.at address@domain.xxx			•
Summary			
Total: Successful:	10 6		
Faild:	4		
	Close		11



8 WordMailMerge Settings Tabs

The following steps will describe the settings tabs :

🔅 WordMailMer	ge Settings			
WordMailMerg	e Settings			
Change the defa	ult settings of Wo	ordMailMerge.		
			_	
General	PDF Settings	About WordMailMerge		
Default Entity:	Firma			
-Gobal Setting	1			
	Debugging			
🗖 Add a 'N	ly Templates' Group)		
🔽 Use sho	rt names			
📕 Use http	o to open templates.			
🔽 Automat	tically merge to a ne	w Document.		
🔽 Default	direction for docum	ents added to CRM is 'OUTG	OING'	
Default Directo	ory for saving the loc	cal Templates:		
l í				
Default closed	letter status reason:	3		
		OK		Cancel

• The General Tab

This tab shows the general settings for WordMailMerge: <u>Activate Debugging</u> is not always necessary, only when an error occurs. <u>Add a "My Templates" generates a newTab</u> in the open templates menu and all your personal templates can be saved here.

• PDF Settings

On this tab you can choose the directory in which your PDF file will be saved and also if it will be deleted after being attached to an email.

About WordMailMerge

This is an information tab showing the version , business unit and the number of active users.



9 Using "Saved Views" to select records

Step 1: Click on [Choose CRM Data]

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

🕅 Suchen	
Serienbrief Daten aus dem Microsft CRM auswählen. Verwenden Sie diesen Dialog um CRM-Objekte auszuwählen.	
General Saved Views Suchen Suchen in: Image: Saved Views Image: Saved Views Name: Image: Views Image: Views Feld Bedingung Wert Image: Views Image: Views Image: Views Image: View	Spalten für den Serienbrief Adresse 1: Adresstyp Adresse 1: Breite Adresse 1: Bundesland/Kantor Adresse 1: Eund/Region Adresse 1: Land/Region Adresse 1: Länge Adresse 1: Länge
Firmenname Primärer Kontakt Telefon 1	Adresse 1: Name Adresse 1: Name Adresse 1: Name des primärer Adresse 1: Postfact Adresse 1: Postfact Adresse 1: Postfact Adresse 1: Straße 1 Adresse 1: Straße 2 Adresse 1: Straße 2 Adresse 1: Elefon 2 Adresse 1: Telefon 2 Adresse 1: UPS-Zone Adresse 1: Versandart Adresse 1: Versandart Adresse 2: Adresstyp Adresse 2: Breite Adresse 2: Breite Adresse 2: Breite Adresse 2: Breite Adresse 2: Fax
Auswählen Abbrechen	

To choose the records by using saved views, we have to change to the register [saved views]

create
Click here to change an existing query
tresse 1: Bundesland/Kantor tresse 1: Fax tresse 1: Land/Region tresse 1: Länge tresse 1: Lieferbedingungen tresse 1 Click here to
refresh the window refresh the window refresh the window reset : Straße 1 tresse 1: Straße 2 dresse 1: Straße 3 tresse 1: Telefon 2 dresse 1: Telefon 3 tresse 1: UPS-Zone dresse 1: UPS-Zone dresse 1: Versandart tresse 2: Versandart tresse 2: Breite dresse 2: Breite
•



Step 2: Create a new query.

By clicking on the button [New] a new window [Advanced Find] will be opened automatically. In this window we have got the possibility to define queries for our "Saved View".

i Bearbeiten Ansicht Fav	voriten Extras ?			
Zurück + 🜍 - 💌	🗟 🚮 🔎 Suchen 🔶 Favoriten 🥝 👔	3• 🕹 🖂 🖵 🕷	1 -3	
	AdvancedFind/AdvFind.aspx?EntityCode=1071		💟 🛃 Wechseln zu	Lin
Help				
J Saved Views				
🚽 Save 🙀 Save As 🗔 Ne	w 🎹 Edit Columns 🛛 👩 Edit Properties			
Look for: Addresses	Use Saved View: [new]			~
LOOK TOP: Addresses	Use saved view: [new]			
🚰 Hide Details 🗺 Clear	Group AND]. Group OR			
🚰 Hide Details 📩 Clear	Group AND]•[Group OR			
	Group AND]•[Group OR			
<mark>Ƴ</mark> Hide Details ★ Clear <u>Select</u>	Group AND Group OR			
	[•] Group AND]•[Group OR			
	Group AND]•[Group OR			
	Group AND Group OR			
	Group AND Group OR			
	[-] Group AND]-[Group OR			
	Group AND Group OR			
	[+] Group AND]-[Group OR			
	Group AND Group OR			
	[+] Group AND]-[Group OR			
	Group AND Group OR			
	[+] Group AND]-[Group OR			
	Group AND Group OR			
	[+] Group AND]-[Group OR			
	Group AND Group OR			
	[+] Group AND]-[Group OR			
	[-] Group AND]-[Group OR			
	[+] Group AND]-[Group OR			
	[+] Group AND]-[Group OR			
	- Group AND - Group OR			
	[•] Group AND]•[Group OR			
	- Group AND - Group OR			
	Group AND Group OR			Fine

In our example we want to define a "Saved View" which delivers all contacts that have been established in the last month.

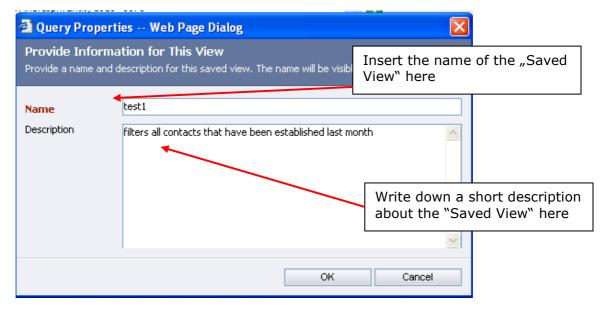
After selecting the entity "Contacts", we can define our search criteria in the field below.

🗿 Advanced Find - Microsoft Internet Expl	orer 🗧	
Datei Bearbeiten Ansicht Favoriten Extras	7	2 2
Choose entity	Suchen 👷 Favoriten 🧐 🔗 🌭 🖂 🦲 🗱 🦓	
Adresse 🧶	Find.aspx?EntityCode=1071	Links »
Eile Help		
Find Saved Views		
🔄 Save 🚺 Save As 🛄 New 🎹 Edit Colu	Imns 🔂 Edit Properties	
Look for: Contacts	Use Saved View: [new]	~
Hide Details 🏫 Clear 💽 Group AND	I Group OR	
 Last Date Included in Campa Last Month 		
Select		_
	Define search criteria here	
	5	Find
2 2	S lokales Intranet	



Now we can change our query as a "Saved View" by clicking on the [Save] or on the [Save as] -button.

The following window appears:



Here we can title our query and write a short description about our "Saved View". With a click on the button [OK] the query is saved. Now we can close the window.

Step 3: Using "Saved View"

Back in the "Search Window" we have to push the button [refresh] to update the list of the "Saved Views".

Verwend	en Sie diesen Dialog um	CRM-Objekte auszuw	ählen.			
General	SavedViews				Suchen	Spalten für den Serienbrief
'ype: ame ▼ st1	Kontakt	_	New	Edit	Refresh	 Abteilung Adresse 1: Adresstyp Adresse 1: Breite Adresse 1: Bundesland/Kanto Adresse 1: Fax Adresse 1: ID Adresse 1: Land/Region Adresse 1: Länge
lständiger Nam	e	Telefon geschä	filich			 Adresse 1: Lieferbedingungen Adresse 1: Name Adresse 1: Name des primäre Adresse 1: Postfach Adresse 1: Postfach Adresse 1: Postfach Adresse 1: Straße 1 Adresse 1: Straße 2 Adresse 1: Straße 3 Adresse 1: Stelfon
						 Adresse 1: Telefon 2 Adresse 1: Telefon 3 Adresse 1: UPS-Zone Adresse 1: UTC-Offset Adresse 1: Versandart Adresse 1: Verwaltungsbezirk Adresse 2: Adresstyp



Now we can choose our "Saved View" and search for records which fulfil by a click on the [Search] – Button.

General Saved Views			SuchenSpalten für den Serienbrief
ype: Firma	<u> </u>	New Edit Re	efresh
			Adresse 1: Breite
ame			Adresse 1: Bundesland/Kantor
st1			Adresse 1: Fax
List	with all "Saved Vi	iews"	Adresse 1: ID
	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		Adresse 1: Land/Region
			Adresse 1: Länge
			Adresse 1: Lieferbedingungen
			Adresse 1: Name
nenname	Primärer Kontakt	Telefon 1	Adresse 1: Name des primärei
gas Systems, Inc.		717-560-9928 ext 23	Adresse 1: Ort
gas systems, inc. C	Stout, Phil	2815379750	Adresse 1: Postleitzahl
.c	Lotz, Hagen	+49-6224-9713-60	Adresse 1: Straße 1
E DIS NO			Adresse 1: Straße 2
F-RIS AG			
rtech	Mc Cabe, Dan	651-994-8558	
rtech Healthcare Solutions		651-994-8558 314-966-4692	Adresse 1: Straße 3
rtech Healthcare Solutions nerstone Technology Inc.	Mc Cabe, Dan Davis, Jim	314-966-4692	Adresse 1: Straße 3
rtech Healthcare Solutions nerstone Technology Inc. vtelEssence	Mc Cabe, Dan Davis, Jim van Oostveen, Daniel		—
rtech Healthcare Solutions nerstone Technology Inc. vtelEssence mawick	Mc Cabe, Dan Davis, Jim	314-966-4692 +31 347 881100	
rtech Heatthcare Solutions nerstone Technology Inc. wtelEssence mawick S Consultants	Mc Cabe, Dan Davis, Jim van Oostveen, Daniel	314-966-4692 +31 347 881100 01652 655111	 ✓ Adresse 1: Straße 3 → Adresse 1: Telefon 2 → Adresse 1: Telefon 3 → Adresse 1: UPS-Zone → Adresse 1: UTC-Offset
rtech Healthcare Solutions nerstone Technology Inc. vtelEssence mawick	Mc Cabe, Dan Davis, Jim van Oostveen, Daniel	314-966-4692 +31 347 881100	 ✓ Adresse 1: Straße 3 △ Adresse 1: Telefon 2 △ Adresse 1: Telefon 3 △ Adresse 1: UPS-Zone △ Adresse 1: UTC-Offset △ Adresse 1: Versandart
rtech Heatthcare Solutions nerstone Technology Inc. wtelEssence mawick S Consultants	Mc Cabe, Dan Davis, Jim van Oostveen, Daniel	314-966-4692 +31 347 881100 01652 655111	
rtech Heatthcare Solutions nerstone Technology Inc. wtelEssence mawick S Consultants	Mc Cabe, Dan Davis, Jim van Oostveen, Daniel	314-966-4692 +31 347 881100 01652 655111	
rtech Heatthcare Solutions nerstone Technology Inc. wtelEssence mawick S Consultants	Mc Cabe, Dan Davis, Jim van Oostveen, Daniel	314-966-4692 +31 347 881100 01652 655111	

Now we have to select the records for our mail merge and with a click on the button [Choose] we get back to our document. Now all the selected records will be used in the mail merge in MS Word.



10 Creating Letters using the Marketing lists

Step 1 First choose your Marketing list:

oft CRM 3.0 - Micr		nterm	et Exp	olorer																						L	-
Go To Tools Help																								User:	Josep	n Admi	ni:
> 🖂 🗋 📷 📆 🗧	Ne Ne	w Rego	ord +	A A	dvance	d Find	0																				
ace M	arketir	ng Lis	sts																								
c Lo	ook for:														Find	1	View:	My /	Active I	Marketi	ng List:	s					_
dar 🛛	P New	1.64	26	& X	1 🚕	Create	Quick	Campa	nign +	Mor	e Actior	ns v			-			- 02-		_	_		 				-
es 📃		Jame -									Marketi	na List I	M	.ast Use	d On	I F	urpose		Ē.				 				
ts 🔰	1	Dallas 1	Tradesh	now Cor	tacts						Contac					1			1.17								
uncements	- 😤 I	Importa	ant Cor	tacts							Contac	E.	13	10/03/2	006												-
m Search	- 👘 т	Texas E	3ike Co	nventio	'n						Lead					æ	irst po	st-confi	e								
ints																											
ss s tes thing Lists algnes Campaigns : edge Base acts ng c Calendar																											
Workplace																											
<place< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></place<>																											
5																											
s																											
s ceting	1 of 3 sele	ected.																							14 4=	Page 1	

Step 2 Once the Marketing list members have been defined simply press the "print in word" button.

	Tradeshow Cont	acts - Microsoft Internet Explore	r		
Eile Actions Help					
🛃 🛃 Save and Close 🍃)		_
Marketing List: Dallas	Tradeshow Co	ontacts			
Details: Information Marketing List Mem Marketing:	General Notes	Dallas Tradeshow Contacts	Member Type	Contact	×
🚰 Campaigns 🚰 Quick Campaigns	Purpose				
15 Galer campagns	Source		Modified On	10/03/2006	
	Cost (\$)		Last Used On		
	Locked		Owner	🔱 Joseph Administ	rator 🔎
	Description				
Status: Active					
Done				🕗 Trust	ted sites



Step 3 Select the desired Template and your Newsletter will be created!

🚰 Choose Word Template Web Page Dialog	[?	×
Select Template You have to choose a template for the MailMerge.			
General My Templates			^
	~		
Newsletter to all accounts of this marketinglist			
Newsletter to all contacts of this marketinglist	X		
			~
<u>ОК</u>	Cance	el	

Step 4 All you need to do now is create a CRM Activity! As shown in <u>part 4.2 step 8</u>

WordMailMerge V.: 2.8.2469.10785	
Do you want to create an activity ?	
Subject:	
Newsletter XX/XX from marketinglist	
Options	
Which activity type should be created?	
Letter C Email C Fax	<
🔽 close activity after creation 🔽 Outgoing 🔽	attach document
Cancel	ок



11 Relationships between Accounts and contacts

Relationships are defined between two parties! These can be as follow :

- Account to Account
- Account to Contact
- Contact to Account
- Contact to Contact

To define a Relationship please execute the following steps :

	al shoppe			_		
ils: Information	General Details Ma	rketing Financial Notes				
More Addresses Activities	Account Name	A nice Deal shoppe	-	Main Phone	555-555-1182	
History	Account Number	A0140		Other Phone		=
Sub-Accounts	Parent Account			Fax		-
Relationships	Primary Contact	Mary Beth Bergstrom		Web Site	http://example.com	
5: Opportunities	Relationship Type	Customer	~	E-mail	example10854@contoso.com	=
Quotes	Address					-
Orders Invoices	Address Name					=
ice:	Address Type		~	City	Sacramento	4
Cases						
Contracts ceting:	Street 1	1178 Sandy Blvd.		Stote/Province	CA	
Marketing Lists	Street 2			ZIP/Postal Code	📲 Click	
Campaigns	Street 3			Country/Region	Relationships	
					Relationships	

Now you can open a "New Customer Relationship"

Save and Close	ት 🎿 🖓 Send E-mail 🌒 🍞	Follow Lin 🎒 Reports 👻	A Print in Word		
account: A nice Dea		0.110			
Details:	3 New Customer Relationship				
More Addresses	Party 1	Role 1	Role 2	Party 2 💌	1
	A nice Deal shoppe		Referral	Adams Jonathon	
à History Sub-Accounts	A nice Deal shoppe		Referral	Abe Tramel	
Contacts					
🕺 Relationships	1				
5ales: Opportunities					
Quotes Orders					
Orders					
Invoices					
Invoices Service:					
Invoices Service: Cases					
Invoices Service: Cases Contracts					
 Invoices Cases Contracts Marketing: Marketing Lists 					
 Invoices Fervice: Cases Contracts Marketing: 					
 Invoices Cases Contracts Marketing: Marketing Lists 					
 Invoices Cases Contracts Marketing: Marketing Lists 					
 Invoices Cases Contracts Marketing: Marketing Lists 					
 Invoices Cases Contracts Marketing: Marketing Lists 					
 Invoices Cases Contracts Marketing: Marketing Lists 	1 of 2 selected.				Page 1
 Invoices Cases Contracts Marketing: Marketing Lists 	1 of 2 selected.				4 d= Page 1 ⇒



Customer Relationship: New	
General Current record: Party 1 Role 1 Description 1	Create relationship to: Party 2 Role 2 Description 2 The Role of the
	second party has to be defined aswell!
Status: New	

After defining and saving the relationship click the print in word button and choose your template!

🗿 Account: A nice Dea	l shoppe - Microsoft Interne	et Explorer			
Eile Actions Help			\frown		
🛃 🛃 Save and Close 🍟	🔓 🎿 🔂 Send E-mail 🌐	🎽 Follow Up 🕙 Reports 🗸	Print in Word		
Account: A nice Dea	al shoppe				
Details:	🕵 New Customer Relations	nip 🛃 🗷 🗙			
	Party 1	Role 1	Role 2	Party 2 🤝	2
More Addresses Activities History Sub-Accounts	A nice Deal shoppe	1	Referral	Adams Jonathon	
👌 History	🕨 🏂 🛛 A nice Deal shoppe	1	Referral	Abe Tramel	
🐛 Contacts					
Relationships					
Gales:					
Quotes					
Quotes Orders Invoices					
Service:					
🗃 Cases					
Contracts Marketing:					
Marketing Lists					
Campaigns					
	1 of 2 selected.				4 🗇 Page 1 ⇒
Status: Active					
🕘 Done					Trusted sites



u have to choose a template for the MailMerge.	
eneral My Templates	
Account Reconnect	
Contemporary Letter	
List of Accounts related to this Account	
List of Contacts related to this Account	
test2	
	~



Should you only want to show specific relationships go to: File > properties>custom>WordMailMergeM2MCondition/Filter type and replace the percent sign with your value.

Document2 P	Properties 🔀
General Sum	mary Statistics Contents Custom
<u>N</u> ame:	WordMailMergeM2MConditi Checked by Client Date completed
	Department with your value Destination Disposition
<u>T</u> ype:	Text
<u>V</u> alue:	'like' value='%'/> Link to content
Properties:	ame Value 🔨
	WordMailMerge account
	WordMailMergeAutoNewDoc true
	WordMailMergeM2MList1 k-entit
	WordMailMergeM2MList2 k-entit
	WordMailMergeM2MList3 link-entit
	WordMailMergeM2MList4
	WordMailMergeM2MCondition <filter th="" typ<=""></filter>
	OK Cancel



12 Document Properties

12.1 Overview

What are the Document Properties?

To give WMM templates more flexibility you can use Document Properties. They are configureable since version 2.18 via an extra window in the "InsertMailMerge fields" dialogue.

How to start?

Open your Template and select WordmailMerge for MS CRM / Insert MailMergefields. Press on the Button "Document Properties".

Ir	nsert mailmerge	fields	×
	Insert mailme	erge fields	
	Use this Dialog i template.	to insert ma	ilmerge fields into your
	Select type:	Contact	
	Fields:		Document Properties
	@ a Glance		^
	A/H Phone		
	ABN		
	- Account Bala	nce	
	Address 1: Ad	ldress Type	
	Address 1: Co	untry/Region	
	Address 1: Co	ounty	
	Address 1: Fa	×	
	Address 1: Fre	eight Terms	

Following window appears:



Tappage 1 - Extra Entity (1:M Relationships)

Here you can create 1:M Relationships. (Its possible to create M:M relationships too)

Basically this tab is seperated into 4 areas:

Document Properties	
Document Properties Use this Dialog to add/change ExtraEntites (1:M and M:M relationships) and the document properties.	
Extra Entitiv Document Properties Select ExtraEntity: Image: New Image:	1
ExtraEntity Mainentity: contact Displayname of Subentity:	2
EntitiesExtraCurve Subentity: Foreign Key to Mainentityt: Mainentity: Alias (optional): ExtraEntity Delete Apply	3
WMM Properties ExtraEntity: EntitiesExtraCurve: M2MList: M2MCondition:	4
If you added a new ExtraEntity please dont't forget to press [Apply] before you press [Apply in Document]! Cancel Apply to document	



1;Select / Create relationship

In this section its possible to select an existing Extra Entity by choosing one out of the Listbox.

To create a new one press [New] and select one of the given Relationships in the dropdown listbox.

Its also possible to create a new relationship from scratch (only for enhanced Users).

After this you are in the "edit-Mode", this means that the tree button [Delete], [Apply] and [Cancel] are now active and also some Fields from the sections below are active.

2;Groupbox ExtraEntity

* Displayname of the Subentity: That's the DisplayName of your "new" Subentity, as it will be shown in the Tree.

* Subentity: the entity you want to show in the Tree

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

3;Groupbox EntitiesExtraCurve

* Subentity: the Entity you want to show additional in your Tree

* Foreign key to Mainentity: the Attribut which is the Key to the Mainentity. (in XML: Referencingattribute)

After you have filled in all the fields you can press [Apply] to add this 1:M Realtionship to the:

4;WMM Properties Groupbox

- * ExtraEntity: This WMM-Prop is used to show the additional Entity in the Tree
- * ExtraEntityCurve: This one defines how the Data is fetched out of CRM
- * M2MList: This is to create/add M:M Relationships by hand!
- * M2MCondition: Field to add special Conditions to M:M relationships



Tappage 2 - Document Properties

Document Properties				×
Document Proper				
Use this Dialog to ada document properties	d/change Extra 	Entites (1:M	and M:M relationshi	ps) and the
Extra Entitiy I	Document Prop	perbes		
AutoNewDoc:	C True	C False	🖲 Default	
AdditionalFields:				
CreateActivitiesfor:				
SORT:				
WordMailMerge:				
Document Name:				
Email:				
NamesToCut:				
SubFolder Name:				
Fetch:				<u> </u>
lfyou added a new press (Apply in Do		ease dont't for	get to press (Apply)	before you
Ca	ncel		Apply to docu	ment

On this page there are some additional Properties which help you to give WMM more power.

To change any WMM-Property please use the [...] Button!



* AutoNewDoc:

If you just select one Row (of Contact, Account, a.s.o.) WMM automatically merges your Template into a doc. Sometimes you don't want WMM to do so for e.g. if you want to send it as an email. Then set this Property to **false**.

Values: true, false, default (setting is overtaken from the WordMailMerge settings)

* Additionalfields:

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

* CreateActivitiesfor:

If you don't want to add the activity into the Main-Entity (e.g. you are merging a marketing list and want to save the activities to the contacts or accounts from in the marketing list.)

Syntax: Entityname, primarykeyfield for e.g.: contact,contact_contactid

-> In this case the activity will be saved to the contact.

* SORT:

tells WMM how to sort. You can set this in [Choose CRM-Data] with the [Sort] Button. Syntax: fieldname collation. (e.g name A -> sorted ascending by name , D for descending)

* WordMailMerge:

here you can see the entity, the template has been created for.



* DocumentName:

here it's possible to define the name of the document. It's possible to use data from Fields out of CRM to be part of the document name.

Document Name Editor 🛛 🛛 🔀							
Document name editor Define the name of the document							
		2					
Description:	Text from within CRM-fields has to bin included via < <fieldname>>. Additional text could be added with 'text'.</fieldname>						
Functions:	".pos(x,y)" will insert y signs from the xth position. ".left(x)" will insert the first x - signs ".right(x)" will insert the last x signs of the string						
Examples:	< <companyname>>+' '+<<quotenumber>>> returns ''MSCRM-Addons.com 123456789''</quotenumber></companyname>						
	< <companyname>>+' No.: '+<<quotenumber>>.left(5) returns ''MSCRM-Addons No.: 12345''</quotenumber></companyname>						
	Cancel OK						

Functions:

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

* Email:

if you choose a email address in this field it is possible to send a email which is already merged so you can avoid this message described in point 6 – Step 1.

WordMailMerge	\sim
Should WordMailMerge autor If you want to create a lette If you want to create an Ema	
(<u>Y</u> es	No

And you also do not need to disable "Automatically merge to new document" under the "WordMailMerge Settings".

* NamesToCut:

Please see Implementation Guide (chapter 1.5.3 and 1.5.4)



* SubFolder Name

With this option it's possible to define folders to which the merged document will be saved to in the FileShare or onto the sharepoint.

For detailed information see chapter 12.2

***FetchXML:** See "FetchGenerator UserGuide" – available on http://www.mscrm-addons.com/default.aspx?tabid=116



12.2 How to configure Sharepoint / Fileshare – paths

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

1) WordMailMerge Server Configuration (Server)

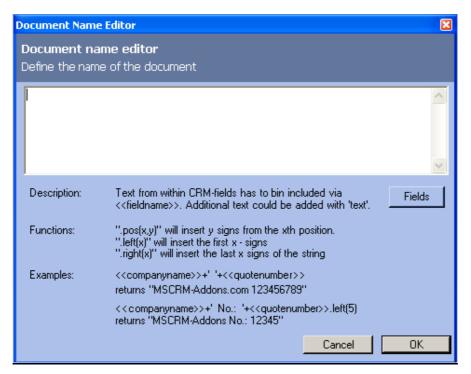
Here it's possible to define root-paths for all entities. (e.g Contact,Account) So all documents created for the entity e.g Contact will be saved to the Contactroot unless no subfolder is defined on the client side.

(See Implementation Guide, chapter 1.3.3 / 1.3.4)

2) Document Properties (Client)

In the document properties of the template (see chapter 12), you can find a setting called "**SubFolder Name**" which allows you to specify a subfolder for the created document.

With a click on [...], you'll see the following window:



<u>Please see (*DocumentName in chapter 12) for a detailed description on this editor.</u>



Examples:

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

• Server-Settings

The gift certificate is a template for the Contact entity, so the Fileshare/Sharepoint –root will be taken from the depending servers setting:

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

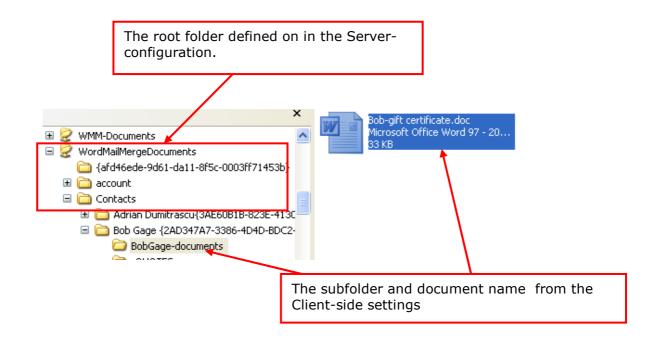
• Client-Settings:

In the Document-Properties, we can define a subfolder-name and a document name for the created Gift-certificate.

Document Name:	< <firstname>>+'-Gift Certificate'</firstname>	
SubFolder Name:	< <fullname>>+'-documents'</fullname>	

<u>Result:</u>

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





2. <u>We will generate a quote and save it to the PrimaryContact on the</u> <u>FileShare.</u>

• Server Settings:

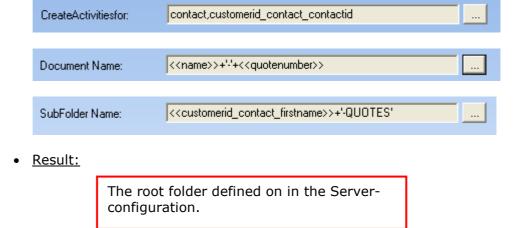
As the document will be created for the entity "Contact", the root folder will be taken from the Contact-Setting rather than the Quotesetting in the WordMailMerge Server configuration.

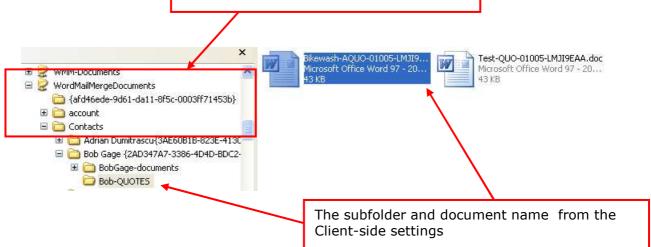
Competitor	Folder X	(detault)
Contact	Folder	\\Dev-crm3\WordMailMergeDocuments\Contacts
Contract	Folder X	(default)

• Document Properties:

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

Therfore the client side settings have to look like this:





NOTICE: This operations are equal on the Sharepoint! (see Implementation GUIDE 1.5.4)

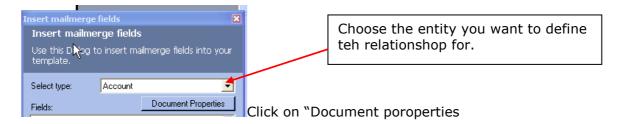


12.3 Step by Step description (build 1:n relationships)

With the option to define 1->n and m->n relationships its possible to link entities together and load data from both into the MS Word document. (see chapter 11.1)

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

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



Step 2; Following window appears: (for explanation see chapter 11.1)

			 perties				
Select E:	ktraEintity:				-		New
Relations	ships:				-		
ExtraE	ntity						
Mainen	- T		accol	unt			
	name of S	oubentity:			 		
Subent	-				 		
surpres	s Mainent	ity:					
	sExtraCu	rve					
Subent					 		
Mainen	i Key to M ititu:	ainentityt	accor	unt	 		
	ptional):				 		
			· ·				
ExtraEn	tity						
	Delete		A	pply		Cance	el
	Propertie	s					
ExtraEr			 		 		
	ExtraCurv		 		 		
M2MLi:		· _	 		 		
	ondition:		 		 		
	onaillion:						



Its possible to select ExtraEntities (relationships) that already have beend defined with the combobox. To add a new relationship we have to click on "New".

You are now in the "edit-Mode", this means that the tree button [Delete], [Apply] and [Cancel], as well as some of the form fields are active.

/	Extra Entitiy	Docun	nent Properties			
	Select ExtraEntity	c.	*New_One*		-	New
Relationships:				-		
	ExtraEntity Mainentity: Displayname of	Subentity:	opportunity_prima account_parent_ account_master_	ts_as_billing_custon ary_accounts account account		
	Subentity:		Account_Appoint	ments		
	surpress Mainer	ntity:	account_orders contract_custome	er_accounts	~	

Step 3; After that some important fields for Extra Entity and EntitiesExtraCurve are filled automatically:

Mainentity:	account	_			
Displayname of Subentity:	Orders	_			
Subentity:	salesorder	_			
surpress Mainentity:					
EntitiesExtraCurve					
Subentity:	salesorder				
Foreign Key to Mainentityt:	accountid	_			
Mainentity:	account				
Alias (optional):	accountorders				
ExtraEntity					
Delete	Apply Car	ncel			

now we have to define the displayname of our extra-entity and if necessary supress the mainentity. If everything is OK, we can go on with a click on "Apply".



Step 4; The WMM properties you can see and check the data again.

WMM Properties		
ExtraEntity:	account-Orders-salesorder-	
EntitiesExtraCurve:	,salesorder-accountid-account-accountorders	
M2MList:		
M2MCondition:		
lf you added a new press (Apply in Doci	ExtraEntity please dont't forget to press [Apply] ument]!	before you
Can	Apply to doc	ument

If everytihing is OK we can finisch with a click on "Apply to document"

Step 5; Now we can see a new entity "Orders" in the list of the available fields for entity account and therefore use it to load data of the orders into the template.:

Insert mailmerge fields							
Insert mailmerge fields							
Use this Dialog to insert mailmerge fields into your							
template.							
Select type: Account							
Fields:	Document Properties						
- Web Site	^						
Created By							
Master ID							
Modified By							
Nation Orders							
- All Orders Received							
- All Orders Sent							
- AMPCI Contract ID							
AMPCI Dealer ID							
AMPCI Planner ID							
- AMPCI Sales ID							
- BalanceAmount							
Bill To Address ID							
Bill To City							
Bill To Contact Name							
Bill To Country/Region Bill To Fax							
Bill To Name							
Bill To Phone							
Bill To State/Province							
Bill To Street 1	~						
Insert	Close						



13 Contact

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