

DocumentsCorePack for MS CRM 2011

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User Guide (How to work with DocumentsCorePack for MS CRM 2011)

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1 User Guide

This guide gives detailed explanations of all functionalities provided by **DocumentsCorePack** for MS CRM 2011.

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

2 Introduction

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

Main Features:

WordMailMerge

Enables the creation of Word-documents with data from MS CRM. It's capable to resolve any relations and works with custom entities as well as with standard CRM entities. Therefore, DocumentsCorePack provides the opportunity to e.g. create quotes, invoices including data from related records like "other contacts", accounts, products, etc.

• Activity Creation

With the possibility to create letter-/email-/or fax-activities, the generated content can be stored back to the regarding CRM record.

• Send and Save as PDF, XPS, DOC, DOCX, ODT, PDF and DOC

Created documents can be sent and saved as PDF, XPS; DOC; DOCX; ODT, PDF and DOC files. It converts the generated documents and therefore DocumentsCorePack provides a powerful option to simplify accounting by handling customer's invoices, quotes, orders, etc.

• Document Management

With the possibility to link DCP with the CRM-SharePoint-integration, the addon allows storing generated documents in a structured way. Documents related to a record (e.g. account or contact) can be accessed via the "Documents" setting in the CRM navigation menu.

- External SharePoint Integration

Next to the CRM-internal SharePoint integration, which is available for MS CRM online too, it is possible to use any other SharePoint-service to store documents.

- Microsoft Windows Explorer Integration

The SharePoint functionality is also available for the Windows explorer. This allows getting a structured file system of documents associated with CRM without the need to use SharePoint services.

Document Summary

The Document Summary is a tool to show you all documents and records (cases, quotes, invoices...) related to a specific record. E.g. Users can open an account and get an overview of all documents of this account and of all related records.

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



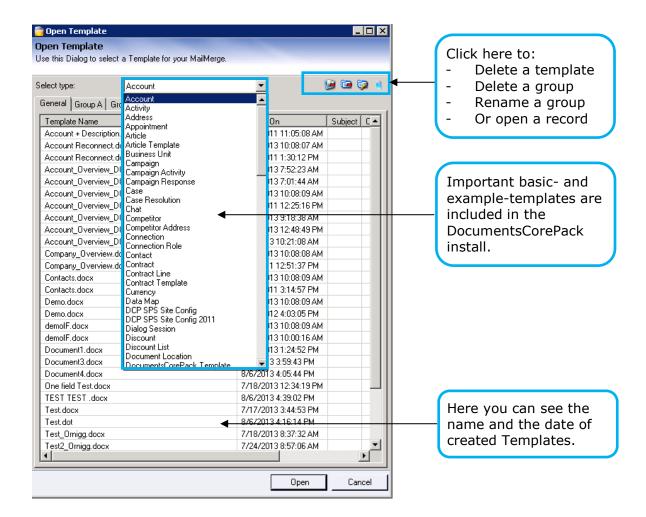
3 DocumentsCorePack-Templates

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

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

For example:

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





Basically, there are two different types of templates (Standard and Office Open XML). The following comparison illustrates the main differences.

Standard	Office Open XML
 Advantages: Use of the MS Word mailmerge- functionality CRM-attributes are treated like standard MS Word merge-fields. All MS Word formatting options allowed 	 <u>Advantages:</u> CRM-attributes are handled by ContentControls Automatic creation of line-item-lists No limitation of the number of "One:Many" – relations No Macros required
 Disadvantages: Complex configuration of templates that should show a list of items (e.g. a quote including a table of quote-products) Macros often required (e.g grouping) Only one "One:Many"- relation can be dealt in a template. 	 <u>Disadvantages:</u> Template creation requires a higher amount of MS Word experience The automated line-item parts do not allow using all MS Word-formatting options.

First, we need to take a look at the creation of those templates.



3.1 Creating templates using Office Open XML (.docx)

The procedure of creating the template using Office Open XML is nearly equal to those of standard-templates. (See chapter 3.3).

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

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

1. Create template layout

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

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

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

Documents Core Pack Question 🛛 🔀
Do you want to create a 'Office Open XML(.docx)' document?
Yes No

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

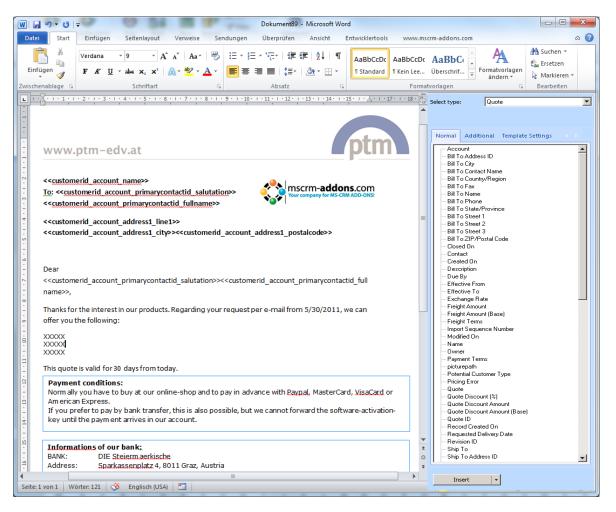


First, we have to choose "Quote" in the "Select type"-dropdown-box.

File Home Insert Page Layout References Mailings Review View Developer Www.mscm=addons.com Open Femplate Image Layout			Document2	- Microsoft Word		
Save Template Choose Create GM Get Size as Documents form Help Standard Template Choose Create GM Size as Documents form Help Organization Template Control of Size as Documents form Help Organization Control of Size as Documents form Help Organization Select type: Quote Control of Size as Documents form Help Size of type: Quote Control of Size as Documents form Help Size of type: Quote Image: Main form Help	Home In:	sert PageLayout Re	eferences Mailings Revie	w View Developer	www.mscrm-addons.com	۵ (
Select type: Quote Normal Additional Template Settings Normal Additional Template Settings Normal Additional Template Settings Bit To County/Region Bit To County/Region Bit To County/Region Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Province Bit To State/Provi	ve Template ert MailMerge Fields	Choose Create CRM S CRM Data Activity Get MS CRM I	PDF → DOCX→ Data Save as PDF → DOCX→ Data Settings	Help Organization		
Mormal Additional Template Settings - Account - Bill To Address ID - Bill To Carlact Name - Bill To Context Name - Bill To Dense - Bill To Staret 1 - Bill To Staret 1 <td>- 2 · I · I · I ·</td> <td> 1 2 3</td> <td>· 4 · 1 · 5 · 1 · 6 · 1 · 7 · 1 · 8</td> <td>· · · 9 · · · 10 · · · 11 · · · 12</td> <td></td> <td>•</td>	- 2 · I · I · I ·	1 2 3	· 4 · 1 · 5 · 1 · 6 · 1 · 7 · 1 · 8	· · · 9 · · · 10 · · · 11 · · · 12		•
Record Created On Requested Delivery Date Revision ID Ship To Ship To Address ID *					Select type: Quote Normal Additional Template Setting - Account Bill To Chy - Bill To Contact Name Bill To County/Region - Bill To Contact Name Bill To County/Region - Bill To State/Province Bill To State/Province - Bill To State/Province Bill To Street 1 - Bill To Street 2 Bill To Street 3 - Bill To Street 3 Bill To Street 3 - Description Description - Description Description - Due By Effective From - Effective From Effective From - Freight Amount (Base) Freight Amount (Base) - Freight Terms Import Sequence Number - Modified On Name - Owmer Payment Terms - picturepath Potential Customer Type - Pricing Error Quote Discount Amount (Base) - Quote ID Record Created On - Requested Delivery Date Revision ID - Ship To Ship To Address ID	
r Insert ▼	1					



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



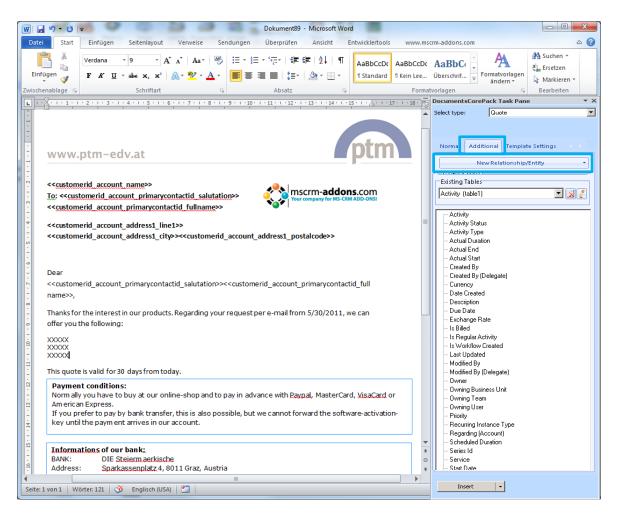
The XXXX – part marks the place where we want to add the list of quote-products including a total-sum field at the end.

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



2. Add line-item relationship

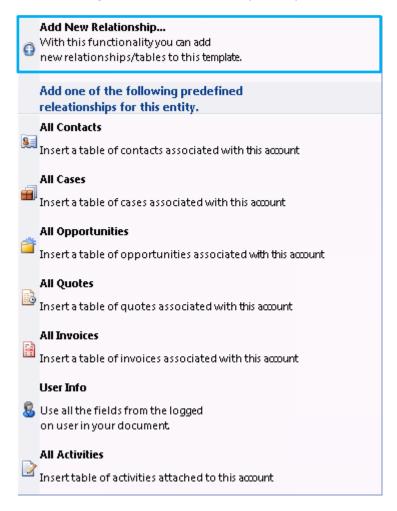
First, we need to resolve the quote-quoteproduct relationship. Therefore, we need to click on the [Additional]-tab in the DocumentsCorePack Task Pane.



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



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



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

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



DocumentsCorePack		_	_			
Configure Fields and Datasource In this dialog you are able to configure the fields, tables and relationships you n Designer FetchXML ResultXML	eed for your documen					
			-			
Select existing Relation	<<	- Advanced S	_			
Relationships Separate Entities		Entity	Quote Product	~	то	
Quote -> Quote Product [quoteid]		То	quoteid	-	(Source)	4
	_	From	quoteid	-	(Target)	
Attributes show all available Fields						
additionalInfo		Туре	inner	•		
Amount		Alias *	quoteid			
Amount (Base)			quotoid			
Created On		Filter				
Description Exchange Rate Z		Ad	d QID			
Extended Amount		Ed				
Extended Amount (Base)	=	Ed	It			
Freight Terms		Del	ete			
Import Sequence Number						
Line Item Number		- Sort order	r			
Manual Discount						
Manual Discount (Base)		Sort Co	lumn1:			•
Modified On		Sort Co	lumn2 [.]			•
orgUnit						
Owner Owning Business Unit		Sort Co	lumn3:			-
Owning Dustriess Onit		Sort Co				
Price Overridden		Son Co	iumn4:			•
V Price Per Unit						
Price Per Unit (Base)						
Pricing Error						
Quantity						
Quote Product						
Quote Status	-					
Link-Elements						
Add product - productid 3						
Edit						
Delete						
				Cancel		ОК

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



3. Inserting table

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

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

tei Start Einfügen	Seitenlayout Verweise Sendunge	n Überprüfen Ansicht En	twicklertools www.ms	crm-addons.com	۵
henablage			AaBbCcDc 1 Standard 1 Kein Lee Format	· · · · · · · · · · · · · · · · · · ·	A Suchen * a c Ersetzen Markieren * Bearbeiten
	Verdana 9 A A Aa B I = 1		· · · <u>\</u> · · · 17 · · · 18 · 🕞	WordMailMerge Task Pane	-
www.ptm-eq	Pe AddTable □		ptm	Select type: Quote	
<< <u>customerid_accoun</u> To: << <u>customerid_acco</u> < <customerid_accoun< td=""><td>Table with header</td><td>mscrm-addons Your company for MS-CRM</td><td>S.COM</td><td> Amount</td><td>▼ Delete Edit</td></customerid_accoun<>	Table with header	mscrm-addons Your company for MS-CRM	S.COM	Amount	▼ Delete Edit
< <customerid_account< td=""><td></td><td></td><td>=</td><td>Description Extended Amount Line Item Number Price Per Unit Quantity Tax</td><td></td></customerid_account<>			=	Description Extended Amount Line Item Number Price Per Unit Quantity Tax	
Dear < <customerid_account name>>,</customerid_account 	_primarycontactid_salutation>>< <cust< td=""><td>omerid_account_primarycontactic</td><td><u>i_</u>full</td><td>Product Created On Description ID Product</td><td></td></cust<>	omerid_account_primarycontactic	<u>i_</u> full	Product Created On Description ID Product	
Thanks for the interest offer you the following		st per e-mail from 5/30/2011, we	e can	Product Name	
XXXXX					
XXXXX					
This quote is valid for 3	0 days from today.				
Payment condition	5: buy at our online-shon and to hav in t	- to	Vie Century		

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

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

	$Thanks for the interest in our products. Regarding \cdot your request per e-mail from \cdot 5/30/2011, we can offer \cdot you the following: \end{tabular}$		
÷	XXXXX	_	
	a de la constante de	×	
[< lineitemnumber>>×	¤	
[x	¤	
	XXXXX¶		
	1		
	This quote is valid for 30 days from today. ¶		
	Daymont-conditions		



4. Formatting the table

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

			Split Column
I	Table Tools		Merge Columns
. Develope	r www.mscrm-addons.com Design Layou	t 📲	Insert Left
	Rows and Columns 👻 🏄 Field properties		Insert Right
	🐔 Grouping 👻 🏄 Table properties	⇒*	Delete Row
Standard	Ag Delete Field	*	Delete Table
Organization	Edit Table		Add Header-/Footer-Row

Once finished, our table could look like this:

No.	Product Name	Quantity	Price Per Unit€	Amount €
< <emnum ber>>	< <quoteid_productid_name>></quoteid_productid_name>	< <quantity> ></quantity>	< <pre><<pre>ceper unit>></pre></pre>	< <extendedamoun t>></extendedamoun
			Total:	< <extendedamo unt>></extendedamo

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

1	Document	Content Control Properties
	Туре:	Money
	Name:	extendedamount_ovalue
	Configure	DateTime format
•	Example:	123.456,89 €
•	Type:	123.456,89€
	Culture:	German (Germany) 👻
	🔲 User o	default format from CRM
		OK Cancel



5. Result

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

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Haussch ingen ✓ Format		Calibri (Textk: *			Ma		AaBbC AaBbCc Überschrif	Titel Forma	A ab	Suchen × Ersetzen Markieren ×
Zwischenablag			Schriftart	😼 Absatz	G		Formatvorlagen			Bearbeiten
		· 2 ·	1 - 1 - 1 - 2 - 1 - 1 -	1 · 2 · 1 · 3 · 1 · 4 · 1 · 5 · 1 · 6 · 1 · 7	8 9	0 · · · 11 · · · 12 · · · 1	3 • • • 14 • • • 15 • • • 👌 • • • 1	17 · · · 18 ·		
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			TEST Gn To: <u>Mu</u>	nbH stermann, Max		entropy mscr	m- addons .com			
				straße 8-10						
				C-DEF 63638						
			DecrM	ax Mustermann,						
			Dear Ma	ax Mustermann,						
	_ I			for the interest in our products. Rega	rding your reque	t per e-mail from 5	/30/2011, we can			
		_	offer yo	u the following:				_	_	
			No.	Product Name Documents Core Pack CRM 4.0	Quantity 10.00	Price Per Unit € 50.00 €	Amount €	2		
							450,00€			
				MS CRM 4.0 PowerSearch Serv.(incl.3 Clients)	1.00	600.00€	540,00€			
				PowerSearch CRM 4.0	7.00	36.00€	226,80€			
				ActivityTools CRM 4.0	10.00	36.00€	324,00€			
				TelephoneIntegr. CRM 4.0/Server(incl.5 CALs)	1.00	550.00€	495,00€			
						Total:	2.035,80€			
	— Г		This quo	ote is valid for 30 days from today.						
			Norma VisaCa If you	ent conditions: ally you have to buy at our online-sho cd or Am erican Express. prefer to pay by bank transfer, this i ion-key until the paym ent arrives in	s also possible, b			3		
			Inform BANK: Addres Accoun IBAN:		az, Austria 20815					
1	rter: 183 🛛 🔮	Englisch (USA)) 🔚					🔲 🛱 🗣 🖉 🔳	10 %	



3.2 Insert QR-code-fields in Office Open XML template (.docx)

This new feature enables you to easily insert QR-code-fields into Office Open XML (.docx). For more information about QR-codes please click <u>here</u>.

The **"Insert as QR Code"**-function is available on every selected template type and for every inserted field.

You can find the new function in the "DocumentsCorePack Task Pane". To get there, please open an existing or create a new template. Click on "Insert MailMerge Fields" in the toolbar and create a "Office Open XML (.docx)"-document by answering the question with [Yes]. (See screenshot below)

Documents Core Pack Question					
Do you want to create a 'Office Don't show this message ag					
	Yes	No			

The "DocumentsCorePack Task Pane" appears:

Task Pane 🔻 🛪	
Quote	
Additional Template Settings	
Account 🗾 🔺 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	
Bill To Street 2 Bill To Street 3	
Bill To ZIP/Postal Code	
Closed On	
Contact	
Created On	
Description	
Due By	
- Effective From - Effective To	
Exchange Rate	
- Freight Amount	
Freight Amount (Base)	
- Freight Terms	
Import Sequence Number	
Modified On	
Name	
Owner Payment Terms	
- Payment Terms - picturepath	
Potential Customer Type	
Pricing Error	
- Quote	Insert as Picture-Field
- Quote Discount (%)	insert as Picture-Field
- Quote Discount Amount	Insert as Picture-Link-Field
- Quote Discount Amount (Base) - Quote ID	insert as Picture-Link-Field
- Record Created On	Insert as Document
- Requested Delivery Date	insert as Document
- Revision ID	Insert as HTML
- Ship To	insere as in the
- Ship To Address ID	Insert as QR Code
Insert -	Insert Static Item



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

Feld Eigenschaften 🛛 🗕 🗙
Select a sourcefield for your embedded document:
Select a sourcetheld for your embedded document: Activity Activity Status Activity Type Actual Duration Actual End Actual Stat Actual Stat Actual Stat Date Created Description Due Date Exchange Rate Is Billed Is Private Is Regular Activity Is Regular Activity Is Regular Activity Statu Updated Left Voice Mail Owner Priority Recurring Instance Type Scheduled Duration Series Id Statu Date Statu Reason
Subject
Selected Field: Description'+< <description>>+'Subject: '+<<subject>></subject></description>
QR Code Level: 5 V Max Length: 108 ERROR Correction: L (7%) V
Documentation
Cancel OK

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

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

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

1. Specify QR-code-name:

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

Constant characters have to be in single quotes. To use field values in the QR-code-name you have to choose the fields as described above or write the fieldname (schemaname) surrounded by <<and>>.



Some examples:

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

It is important that the inverted commas are also set!

Functions:

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

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



Now the QR-code is ready to be merged with data from CRM (you can do this by clicking on the "Choose CRM Data"-button in your www.mscrm-addons.com tab). The QR-code can be a link, a visit-card-contact, contact, product information... etc.

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

2 QR-code settings

QR-code settings can be changed by clicking on the [Field properties]-button in the www.mscrm-addons.com-tab.

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

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

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



Capacity of the different error correction levels:

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

IMORTANT: It is recommended to choose the default value. Otherwise data may be lost by trying to resolve the code!

3.3 How to set if/else conditions in Office Open XML template (.docx)

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

Syntax:

The syntax needed is pretty simple:

{if"<<CRM_FIELD>>"="XY" "Content if condition is fulfilled" "Content if condition is not fulfilled"} where the yellow part marks the condition, the green part the content that will be printed if the conditions is fulfilled and the red part the content that is printed if the condition is not met vice versa.

IMPORTANT:

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

Examples:

Printing a gender-specific salutation: Dear {if"<<salutation>>"="Mr." "Mister" "Misses"} <<lastname>>

Showing fields only if available within CRM: {if"<<emailaddress1>>"<>"" "Email: <<emailaddress1>>" ""} {if"<<mobilephone>>"<>"" "<<mobilephone>>"}

Common problems:

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



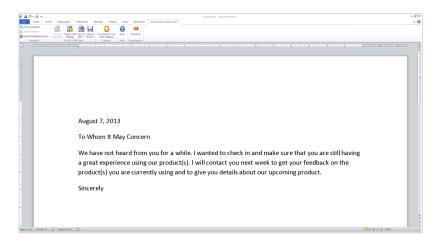


The $\{\}$ cannot be inserted in the upper line of this picture without placing any kind of text. In the second line a space has been inserted after the name-field.

3.4 Creating Standard Templates

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

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

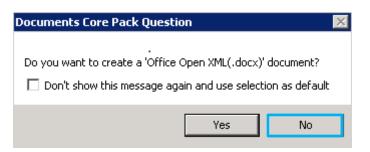


3. We will add the MS CRM fields now. To do this, click [Documents Core Pack for MS CRM] -> [Insert MailMerge Fields] in the toolbar.

👿 🚽 🍠 🕶 🛛 =						Document2 - Microsoft Word
File Home Inse	rt Page Layout References	Mailings Review	/ Viev	v Developer	www.mscrm-addons.com	
🕎 Open Template	📄 🚔 💩 I	I 🐴	6			
Save Template		III 😽		-		
📦 Insert MailMerge Fields	Choose Create CRM Send as Sa CRM Data Activity PDF * D		Help	Standard		
Templates	Get MS CRM Data	Settings	Help	Organization		



4 The following message will appear:



Press [No] to proceed creating the standard template.

5. The following taskbar will appear:

Insert mailmerge	fields	×				
Insert mailmer	qe fields					
Use this Dialog to insert mailmerge fields into your						
template.	2					
Select type:	Contact (contact)	-				
Fields: Document Properties						
Fields:	Document	Filipenties				
Account		_				
Address 1: Add	ress Type					
Address 1: City						
Address 1: Cou	ntry/Region					
Address 1: Cou	nty					
- Address 1: Fax						
- Address 1: Frei	ght Terms					
- Address 1: ID						
- Address 1: Latil	tude					
Address 1: Lon	gitude					
Address 1: Nan						
Address 1: Pho						
Address 1: Pos						
	ary Contact Name					
Address 1: Ship						
Address 1: Stat						
Address 1: Stre						
Address 1: Stre						
- Address 1: Stre						
Address 1: Tele						
Address 1: Tele	•					
Address 1: UPS						
Address 1: UTC						
Address 1: ZIP.						
Address 2: Address Type						
Address 2: City		<u> </u>				
		Insert				
		Close				

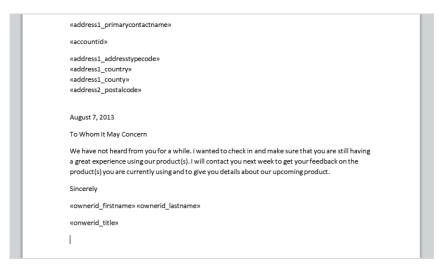
First, choose the entity of the template you want to create [Select Type].

There are specific CRM-attributes and different form letter-fields for each entity. If "Contact" is selected, CRM will only work with fields of the entity "Contact". We have chosen "Contact" in our example.

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



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



7. Now save the template.

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

👿 🚽 🍠 ד 😈 Ŧ						
File Home Inse	rt Page Layout	References N	1ailings Review	View	Developer	www.mscrm-addons.com
Open Template Save Template Save Template Save Template Save Template		Send as Save as	O ocuments Core	Provide the logic contract of the logic c	standard	
Templates	CRM Data Activity Get MS CRI	PDF ▼ DOCX ▼ M Data	Pack Settings Settings	Help	Organization	

8. The following dialog will appear:

elect type:	Account	🖂 🛛 😥 🤇	🖻 🖬 🧔 🔰
General Group A	Group B Group C Group D		
Template Name		Created On	Subject C 🔺
Account + Descript	ion.dot	3/31/2011 11:05:08 AM	
Account Reconnec	t.dot	1/15/2013 10:08:07 AM	
Account Reconnec	t.dot	3/15/2011 1:30:12 PM	
Account_Overview	_DOCX - CRM Searchdlg - multi.docx	6/12/2013 7:52:23 AM	
Account_Overview	_DOCX - CRM Searchdlg.docx	6/12/2013 7:01:44 AM	
Account_Overview	_DOCX.docx	1/15/2013 10:08:09 AM	
Account_Overview	_DOCX.docx	6/28/2011 12:25:16 PM	
Account_Overview	_DOCX-AMTEST.docx	2/14/2013 9:18:38 AM	
Account_Overview	_DOCX-Demo.docx	1/30/2013 12:48:49 PM	
Account_Overview	_DOCX-DNwPOS.docx	7/4/2013 10:21:08 AM	
Company_Overview	v. dot	1/15/2013 10:08:08 AM	
Company_Overview	v. dot	4/5/2011 12:51:37 PM	
Contacts.docx		1/15/2013 10:08:09 AM	
Contacts.docx		7/28/2011 3:14:57 PM	
Demo.docx		1/15/2013 10:08:09 AM	
Demo.docx		1/18/2012 4:03:05 PM	
demolF.docx		1/15/2013 10:08:09 AM	
demolF.docx		1/15/2013 10:00:16 AM	
Document1.docx		6/14/2013 1:24:52 PM	
Document3.docx		8/6/2013 3:59:43 PM	
Document4.docx		8/6/2013 4:05:44 PM	
One field Test.docx		7/18/2013 12:34:19 PM	
TEST TEST .docx		8/6/2013 4:39:02 PM	
Test.docx		7/17/2013 3:44:53 PM	
Test.dot		8/6/2013 4:16:14 PM	
Test_Ornigg.docx		7/18/2013 8:37:32 AM	
Test2 Ornigg.docx		7/24/2013 8:57:06 AM	-

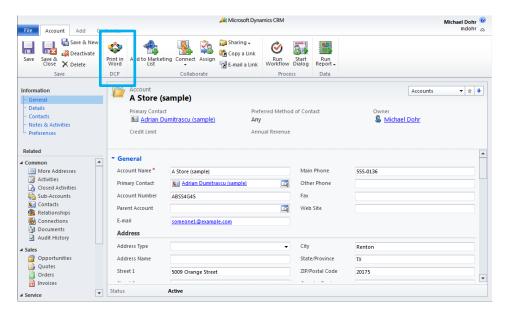


In this window you can name the template you created and decide in which category it should be stored.

In this dialog you are able to:

- Create new groups
- Update existing groups
- Delete templates

The template is now ready to be used. To run a first mailmerge, we open the MS CRM Client and open an account.



A merge can be started with a click on the "Print in Word" button at the top.

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

this Dialog to select a Template for your M	lailMerge.			🔒 🖬	
yp auswählen: Account				-	
ieneral					
Template Name	Created On	Subjects	Category	Keywords	Comment
Account Reconnect.dot	18.02.2011 07:47:04				
Contemporary Letter.dot	18.02.2011 07:47:04				
List of Accounts related to this Account.dot	18.02.2011 07:47:05				
List of Contacts related to this Account.dot	18.02.2011 07:47:05				
4	111				



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

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

More details please read the previous <u>chapter 3.1 "Creating templates using Office Open XML"</u>.

3.5 Document/Template Properties

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

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

How to access the document properties

Open your template and select "*MS Word->www.mscrm-addons-Ribbon->Insert MailMergefields*". A dialogue as described in <u>chapter 3.1</u> appears. Click on [Document Properties] to access the document properties.

Insert mailmerge fi	elds	E
Insert mailmer Use this Dialog to in template.	r ge fields nsert mailmerge fields into your	
Select type:	Contact (contact)	•
Fields:	Document Properties	
Account Address 1: Addi Address 1: City Address 1: Cour Address 1: Cour Address 1: Cour Address 1: Fax Address 1: Fax Address 1: Ip Address 1: ID Address 1: ID	ntry/Region nty ght Terms	- III



3.5.1 The "Document Properties"-Tab

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

Document Properties	- 848				
Document Propertie	es	(1.M M.M.	- let's b's - A		
Use this Dialog to add/cha	inge ExtraEntites	(1:1M) and M:1M1	relationships) and	a the document propert	les.
Document Properties	ExtraEntities				
WordMailMerge:					
CreateActivitiesFor				Edit	
AdditionalFields:				Edit	
DocumentName:				Edit	
SubFolder Name:				Edit	
Email:				Edit	
Sort:				Edit	
NamesToCut:				Edit	
Fetch:				Edit	
T Cloth.					
				-	
AutoNewDoc:	C True	False	Oefault		
Autorewood.	Inde				
Send as PDF - Attack	iment:				
Skip "Send as PD)F" file name dial	oa			
				Apply	Cancel

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



Settings:

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

DocumentName	Editor
DocumentNa Define the name	of the document
	~
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" <<companyname>>+' No.: '+<<quotenumber>>.left(5) returns "MSCRM-Addons No.: 12345"</quotenumber></companyname></quotenumber></companyname>
	<u>O</u> K <u>C</u> ancel

Functions:

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



- **SubFolderName**: When using the SharePoint or FileExplorer-integration, the documents are saved in a specific folder. This option allows defining CRM-record-specific subfolders. (e.g. save a quote in the standard-quote-folder + a ParentCustomer-Subfolder) (for details, see <u>chapter 8</u>)
- **Email**: This property allows predefining an email attribute. Email address stored in this field will be used by all mailing procedures within DCP.
- Sort: This property allows setting sort-parameters for the loaded records. E.g. Sort quote-product by LineItemNumber- ascending, or sort loaded contacts by lastname ascending. <u>Syntax</u>: fieldname collation (e.g name A -> sorted ascending by name, D for descending)
- **NamesToCut:** In MS Word mergefields are not allowed to be longer than 42 characters. With this setting, parts of a fieldname can be shortened to work around this limitation. <u>Syntax</u>: [Text to abbreviate] [short name], e.g. parentcustomer-pc1
- AutoNewDoc: If you just select one row (of contact, account, a.s.o.) DCP automatically merges your template into a doc. Sometimes you don't want DCP to do so (e.g. if you want to send it as an email). In this case, set this property to false. <u>Values</u>: true, false, default (setting is overtaken from the DocumentsCorePack settings)
- Send as PDF Attachment: Here it's possible to define static attachments that should be added to the email activity. E.g. add a "Terms & Conditions.pdf" when sending a quote as a PDF.
- Skip Send as PDF –Filename dialog: Allows skipping the SaveFileDialog when using the "Send as PDF" functionality.



3.5.2 The "ExtraEntities"-Tab

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

Basically, this tab is separated into 4 areas:

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



1. Select / Create relationship

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

2. Groupbox ExtraEntity

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

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

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

3. Groupbox EntitiesExtraCurve

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

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

4. DCP Properties Groupbox

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

- * ExtraEntityCurve: This one defines how the data is fetched out of CRM.
- * M2MList: This is to create/add M:M relationships by hand.
- * M2MCondition: Field to add special conditions to M:M relationships.

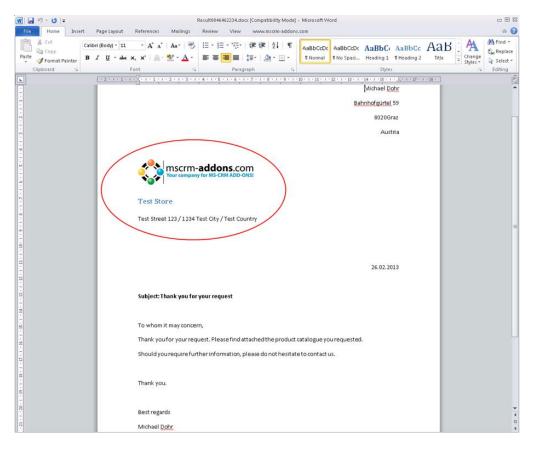


3.6 Insert as HTML-functionality

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

NOTE: Before you are able to use this functionality, you need to implement a HTML editor into your CRM system. There are various free and charged HTML editors which you can use. In our example, we work with the 'tinyMCE' HTML editor. Please follow the <u>link</u> to get detailed information on how to implement this free HTML editor into MS Dynamics CRM 2011.

To create a document like the one in the screenshot below (content in the red elipse is the content added to the record via the html editor in CRM), please follow the steps described further down.



1. Open e.g. an account in CRM and click on 'HTML_Description'. After that, a HTML editor will open (see next screenshot, red ellipse).



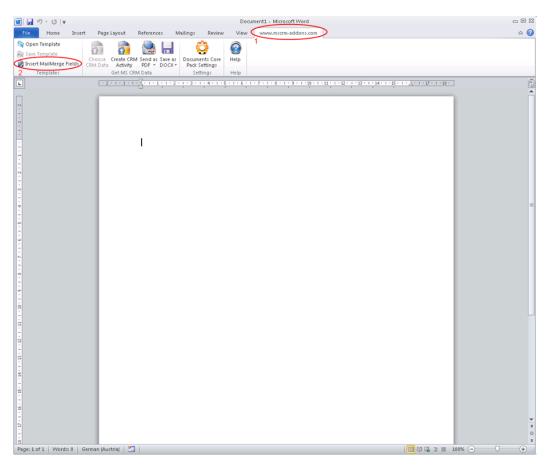
Account: Test Store - Microse		ws Internet Explorer countbid=758e6e19-567f-e211-a37e-00155dc881205pagetype=entityrecord	P 🛨 🖘 🗶 Workplace: PowerSearch - Mor		
- Martinese	n para manganan angar kari ka		All Microsoft Dynamics CRM	Account: Test Store - Micros X	Michael Dohr 🤒
Account Add Cu	ustomize PowerSearch		The second states of the second states of		Standard @
Save & New		📣 🖪 🎘 📮Sharing+ 🔥 📰 🕫			
i 🚾 🧟 🖓 Deactivate		📸 🤮 🖓 Copya Linx 🎯 🚮			
Close X Delete		Add to Marketing Connect Assign Caralia Link Workflow Dialog Rep			
Save	DCP TI	Collaborate Process Da	đa		
emation	Account				Accounts + + +
Seneral	Test Store				
Netalls fTML-Description					
references	- General				A
lotes & Activities Iontacts	Account Name *	Sent Store	Main Phone	444444	
inspecified		(Casheers)		0123456789	
	Account Number		Other Phone		
fied	Parent Account		III Fax		
More Addresses	Primary Contact		C Web Site		
Activities	Relationship Type		E-mail		
Closed Activities	Currency	et face	a		
Sub-Accounts Contacts	Address				
Relationships	Address Name	Test Street 123	ZP/Postal Code	1234	
Connections	Street 1		Country/Region	Test Country	
Documents Audit History	Street 2		Phone		
ErrailPreview	Street 3		Address Type		2
ActivityPreview GroupCalendar	City	Test City	Shipping Method		2
Licences	State/Province	[lest City	Freight Terms		
es.	State/Province	1	Freight terms	1	-
2 Opportunities					
Quotes Orders					
Involces	 Details 				
vice	HTML-Descripti	n			
Cases					
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rketing Campaigns	Owner*	Michael Dohr	Criginating Lead		a
Marketing Lists	Billing Information	n			
ocesses	Credit Limit	¢	Payment Terms		
Workflows Dialog Sessions	Credit Hold	C Yes @ No	Price List		a
unancy sessions	Contact Methods				
	Preferred	Any	2		
		1 cm 4	2		
	Status	Active			
	- W 🔜				* 💬 🎘 🐑 😘 15:46

2. By using this HTML editor, you can add and format the information you like. (see next screenshot, red ellipses 2 and 3). Click on 'Save' in the CRM ribbon (see next screenshot, ellipse 4) after you finished adding and formatting your content.

Account: Test Store - Micros	NR. Dynamiks ORM - Windows Internet Explorer	_@×
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Dialog Sessions	FP+ CMG pre=http://www.mem-accens.com/fivetal.GMSCMACCILMSCMA.Accens.Logo.Acc and pref=acct+327 new tre=http://www.mem-accens.com/fivetal.GMSCMACCILMSCMA.Accens.Logo.Acc and pref=acc	
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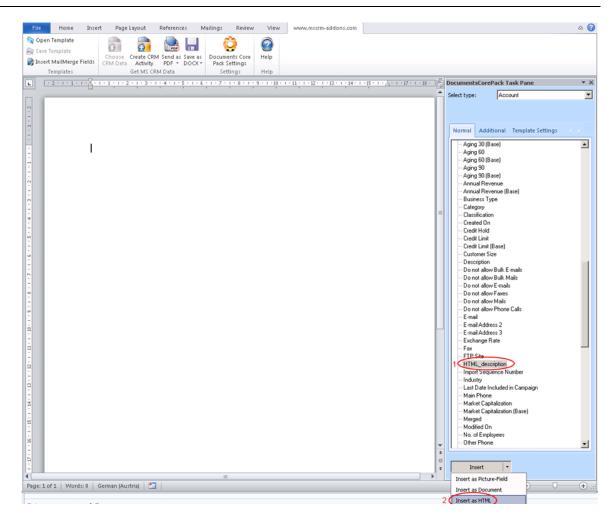
3. Afterwards, open MS Word and navigate to the www.mscrm-addons.com tab in the menu ribbon on the top (see next screenshot, ellipse 1). Here you can start to create your template. To do so, click on 'Insert MailMerge Fields' and insert the mailmerge fields you need (see next screenshot, ellipse 2).



4. If you would like to insert the content which you added to the account before using the HTML editor, set the cursor to the position in the document where you want the information to be inserted.

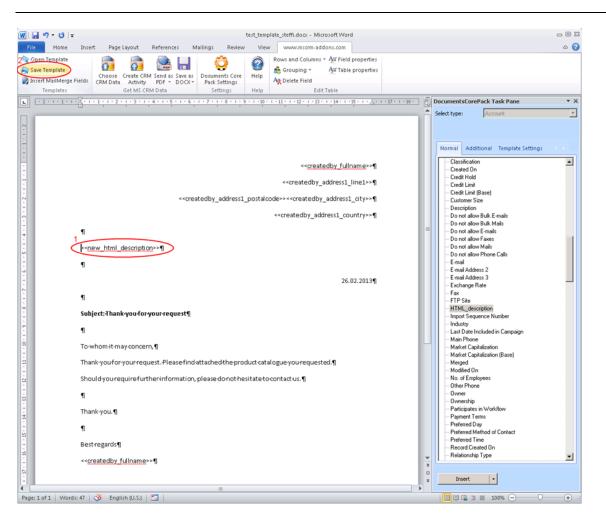
Then navigate to the 'Normal'-tab within the DocumentsCorePack Task Pane on the right and choose the field 'HTML_description' from the tree menu (see next screenshot, ellipse 1). Choose the 'Insert as HTML'-option from the 'Insert'-options at the bottom to add the field correctly (see next screenshot, ellipse 2).





5. After that, the mergefield 'new_html_description' is added to the template (see next screenshot, ellipse 1). Continue to create your template by inserting the mailmerge fields and the text you need. When you finished creating your template, save it by clicking on the 'Save Template'-button in the menu ribbon on the top (see next screenshot, ellipse 2).





12. After finishing and saving the template, you can start a mailmerge process to get the document including data from CRM. To do so, you have the following two options:

6 a Start from within MS Word

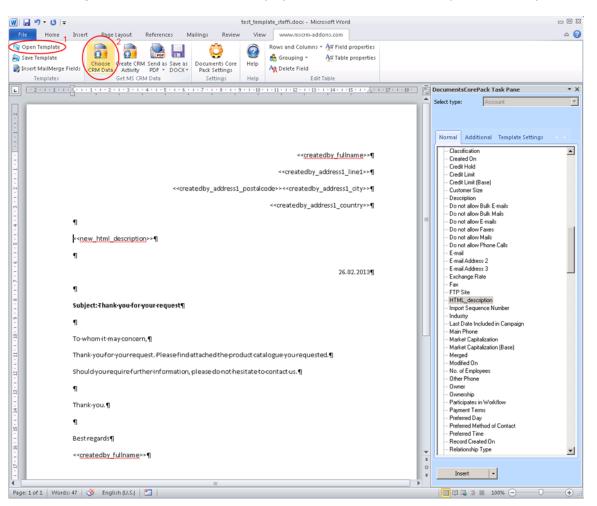
6 b Start from within CRM



Option 6 a: Start a mailmerge process from within MS Word

To start a mailmerge process from within MS Word open a template by clicking on 'Open Template' in the menu ribbon on the top (see next screenshot, ellipse 1). After the template has opened, click on 'Choose CRM Data' in the menu ribbon on the top (see next screenshot, ellipse 2).

A lookup-window will open. Within this window, search for/choose the account of which you need the data to be added (in this case, the account to which we added content before using the html-editor is chosen). (see next screenshot, ellipses 1 and 2).



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Home	Insert Page Layout Refe	rences Mailir	igs Review	View	www.mscrm-ad	dons.com				۵ (
en Template			õ	0		 Are Field properties 				
re Template	Choose Create CRM Ser	d as Save as Do	cuments Core	Help	👶 Grouping *	Az Table properties				
ert MailMerge	Fields CRM Data Activity PD	F * DOCX * P	ack Settings		Ag Delete Field					
Templates	Get MS CRM Da		Settings	Help		: Table		(
- 2 - 1 - 1 - 1			7 • 1 • 8 • 1 • 9	· · · 10 · · I	11 + 12 + 13 +	1 - 14 - 1 - 15 - 1 - 2	1 • 17 • 1 • 18 •	1		
		Search						2	count	¥
		MailMerge w Use this Dialo			ita. cts you want to m	ailmerge.				
		Find in:		Account		-			I Template Settings	
		General Sa	ved Views	,						
			test sto	cal		Active Records	20		1	
		Name:	Itest sto	re		Active Records	<u> </u>	Search	1	
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	< <u>new_html_description</u> >>								ne Calls	
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	9									
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	To-whom it-may-concern, ¶								ion	
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	Thank-youfor-your-request									
	Shouldyourequirefurtheri									
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Choose the needed CRM record from the search result (see next screenshot, ellipse 1) and click on 'Select' to trigger the mailmerge process (see next screenshot, ellipse 2). After the mailmerge process, the merged and completed document will open in MS Word (see screenshot under step 7 further below).

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and the second	Templates		Nity PDF 1S CRM Dati	* DOCX*	Pack Settings Settings	Help		Edit Table						
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-				General	Saved Views									-
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	Be:	stregards¶										Record created		
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- 17											0 ¥	Insert	-	
•										•				
Page: 1	of 1 Words: 47	🍼 English (U.	S.) 🎦) 🗘 🖓 🗇 🔳	100% 🖂 🔍 🗸	• .::



Option 6b: start a mailmerge process from within CRM

To start a mailmerge process from within CRM, open the CRM record of which you need the data to be inserted into the document. In our example, we open the account 'Test Store'. Click on the 'Generate Document'-button (see screenshot, ellipse 1; NOTE: this button is previously known as 'Print in Word'-button or may be known under another name as this is configurable by the administrator in the server-settings of DocumentsCorePack) and choose the appropriate template from the drop-down-menu (see screenshot, ellipse 2).

In our example, we choose the template we created before as described in the steps further above. After that, the merged document including the data of the CRM record will open in MS Word in the background. To view and process the document, click on the 'Word'-button in the taskbar (see the merged document in the screenshot under step 7 further below).

Account: Test Store - Microsoft	Dynamics CRM - Window	Internet Explorer				_ 8 X
(andserver/S	Randard/main.aspx?etc=16e	aga=%3f_gndType%3d1%26etc%3d1%26d%3d%257b758E6E19-567F-E211-A37E-00155DC88120%257 🔎 💽 😏	Accounts: M	Active Accounts	Ar Account: Test Store - Micros X	
			ft Dynamics CRM			Michael Dohr 😕
File Account Add Cust	tomize PowerSearch					Standard @
Save & New	and an	🙏 📧 🖄 📴 Sharing - 🛷 📻 📾				
Gue Gue A	🗇 🔿	🔧 🧏 🚵 💑 Copya Link 🎯 🚮 📳				
Save & Deactivate	Generate Document	id to Marketing Connect Assign Remail a Link Workflow Dialog Report				
(ma	Account HTML Tempia	Brocerry Data				
	Account Reconnect.di	000				
	Account_Overview_do	ame, picture, folder, doox				Accounts • 0 0
	Account_Overview_DO					
	Account_Overview_wi					
		docname_and_picture.docx				<u>*</u>
Contrate	Company_Overview.d			Main Phone	0123456789	
	Contacts.docx test account.docx			Other Phone		
	test acp.docx			Fax		
House	est quote.docx					
	test template dot			Web Site		
Activities 2	test_template_steffi.di			E-mail		
Closed Activities	test	test_template_steffi.docr				
Sub-Accounts	all contacts dock					
Relationships	Address Name	st Street 123		ZIP/Postal Code	1234	
S Connections	Street 1			Country/Region	Test Country	
Documents Audit History	Street 2			Phone	[[[[[[[[[[[[[[[[[[[
C EmailPreview						
ActivityPreview	Street 3			Address Type		2
GroupCalendar		st City		Shipping Method		2
	State/Province			Freight Terms		
 Sales Opportunities 						
Quotes						
Orders	Details					
🔒 Involces						
Service Gases	HTML-Descriptio					
Contracts	• Preferences					
4 Marketing	Owner*	Michael Dohr		Originating Lead		
Campaigns	Billing Information	- Excellence	L 4	ong nating teas		
🐏 Marketing Lists						
4 Processes	Credit Limit			Payment Terms		2
G Workflows	Credit Hold	Yes 🖲 No		Price List		2
and a start starting	Contact Methods					
		ry				
		·				•
Javascript:;	Status	ive				
25art 🚴 🩆 🚆	- W. 🖪 🕻					* [P) [E %] 🚱 👍 17.09
						27.02.2013

13. After the mailmerge process, the document including the data from the CRM record and in this example also the content added to the account via the html editor is available for further processing. As you can see in the screenshot below, the style of the text parts corresponds to the style sheets of MS Word.

In our example, we chose the style 'Heading 2' for the text 'Test Store' and the style 'Paragraph' for the text 'Test Street 123 / 1234 Test City / ...' using the html editor. In the merged document, the text parts are displayed corresponding to the settings of the style sheets of MS Word (see next screenshot).



W 5 .	Resulta\$341278.doo.[<empkbitlymodd] -="" miosoftword<="" td=""><td>ń</td></empkbitlymodd]>	ń
K Cut	Called Book 1 - A A A A - B E- T- B B A A B COL ABBCCO	
Clipboard G		
•	Construction of the state of th	
-	Michael Dohr	
	Bahrehofgurtel 59	
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÷		
	mscrm-addons.com	
	Their company for MS-CMA ADD-ONS	
	Test Store	E
	Test Street 123 / 1234 Test Oty / Test Country	
2		
÷	26.02.2013	
-		
-	Subject: Thank you for your request	
-		
	To whom it may concern,	
	Thank you for yourneyst. Please find attached the product catalogue you nequested.	
	Should you requirefurther information, please do not heritate to constant us.	
	shows your equire the true in a contained y presser out on a particular out	
÷		
	Thank you.	
2		
	Bestregads	
-	Midhael Dehr	
e		P. 2

3.7 How to filter group-templates

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

To take advantage of this new feature you need at least both of the following versions:

- DocumentsCorePack Server for MS CRM 2011 5.36
- DocumentsCorePack Client for MS CRM 2011 5.73

Specification

DocumentsCorePack templates can be organized in groups. These groups are shown as separate tabs in the "Open Template" dialog and are also available as sub-items in the Print in Word flyout button (see screenshot below, red squares).

늘 Open Template	EAccount: MSCRM-ADDONS.com - M	Microsoft Dynamics CRM - Windows Internet Explorer	
Open Template Use this Dialog to select a Template for your MailMerge.	File Account Add Custom	Microsoft Dynamics CRM	
Select type: Account Ceneral Group A Group B Group C Group D Template Name Created On Subject Category Keywor Account_Overview_DOCX-8.docx 12/13/2012 9:46:35 AM	Save & Close X Delete nu	Call Print Add to Marketing Connect Assign	Sharing - Copy a Link E-mail a Link Proc
	Information General Details	A Count Reconnect.dot N C Account Querview_DOCX.docx PP C Company_Overview.dot	Acco
	 HTML-Description Preferences Notes & Activities 	Erico Method	
	Unspecified	Account Group B Group B Group B	
	Related	Account Group C Parent Group D Parent Fax	nt_Overview_DOCX-B.docx



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

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

Open Template Jse this Dialog to select a Template	for your MailMerge.		File	Accou	int Add	Cust	:omize		세 Mic	rosoft Dy	namics C	RM			
Group B Template Name Account Overview DOCX-B.docx	Created On 12/13/2012 9:46:35 AM	 📔 Category Keywo	Save	Save & Close	Save & Ne Cartivate Deactivate Delete ave		Call number -	Print	Add to Ma	rketing	Connect		🧊 Sharing ▾ টি Copy a Link টি E-mail a Link	Workflow Proc	
			Inform	ation				Group B	æ.		Overview	_DOCX-I	B.docx	Acco	unts
				ails /IL-Descrip ferences	ption			imary Cor	ntact ian Ternek		Pre An		lethod of Contact	Owne	lich
			- Cor	es & Activ tacts pecified	vities		- Gener	ral t Name *	MSCR	M-ADD	ONS.com		Main Phone	mathe	c40
			Relate	ed.			Accoun	t Number	, <u> </u>				Other Phone	+4331	668
			4 Com a a a a a a a a a a a a a	mon More Ado Activities			Primary	Account Contact nship Typ		nristian 1	<u>Ternek</u>	a a	Fax Web Site E-mail	http:/	
				Sub-Acco			Current	cy	🥰 <u>E</u>	uro			GroupFilterText	Group	в

The screenshot above also shows the field which contains the filter criteria (attribute) for this record (see screenshot, 'GroupFilterText'-field at the bottom on the right). In this example, only templates of the template-group 'Group B' are displayed and can be selected within the Print in Word flyout button.

The following paragraph describes how to configure this feature.

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



Configuration

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

After clicking on this button, a new window opens. This window displays all entities that have been configured to show the Print in Word button.

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

If you look at the first two screenshots of this chapter, you can see that you can define which template-group should be displayed within accounts. In our example, we defined to only display templates of the template-group 'Group B' for the account 'MSCRM-ADDONS'. Therefore, we typed in 'Group B' within the 'GroupFilterText'-field within this account. After saving the changes and when opening the Print in Word flyout button within this record next time, only templates of the group 'Group B' will be displayed (as shown in screenshot 2).

🚯 DocumentsCorePack Server Config v5.36 // Standard @ crm4server			
Ribbon General Settings File Explorer SharePoint Document Summary	Advanced		
Change the Ribbon in CRM		Advanced template filtering	_ 🗆 ×
		Welcome to the advanced group filtering for	templates
Name of the Button: Print		With this form, you can link attributes of specififc entit	ies to the group field of the DCP templates entity
Disable Microsoft Dynamics CRM Mail Merge B	utton	Click here for Blog article	
Enable Template selection from Ribbon	Adv. Ribbon	Entityname	Template Group Filter Field
Use hierachical menus		Quote	
Entity Name	🔺 Select 📥	Marketing List	
Account		Lead	
Address		Invoice	
Appointment		Goal	
Article		E-Mail Attachment	
Campaign		DocumentsCorePack Template	
Campaign Activity		Discount	
Campaign Response		DCP SPS Site Config	
Case		Contract	
Chat		Contact	
Competitor		Connection	
Connection		Chat	
Contact		Campaign Response	
Contract		Campaign	
Contract Line		Appointment	
DCP SPS Site Config		Account	GroupFilterText 📃
DCP SPS Site Config 2011			
Discount	V -		
Advanced Button Configuration Advanced Temp	late Group Filtering		OK Cancel
	OK	Cancel	



4 Generate and save documents back to CRM

In this chapter we will take a look at the three possibilities to store generated documents back to CRM:

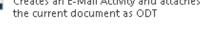
1. Create CRM Activity



2. Send as PDF, XPS, DOC, DOCX, ODT, PDF and DOC

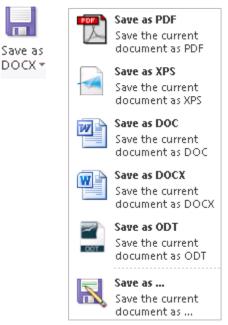


Send as PDF Creates an E-Mail Activity and attaches the current document as PDF Send as XPS Creates an E-Mail Activity and attaches the current document as XPS Send as DOC W Creates an E-Mail Activity and attaches the current document as DOC Send as DOCX W Creates an E-Mail Activity and attaches the current document as DOCX Send as ODT Creates an E-Mail Activity and attaches



Send as PDF and DOC Creates an E-Mail Activity and attaches the current document as PDF and as DOC

3. Save as DOCX, PDF, XPS, DOC; ODT





We will work with the templates included in the setup and explain all options step-by-step.

After doing that, the Word-document will be accessible in MS CRM and you are able to e.g. send an email with the PDF-document attached.

4.1 Generate a Document - Step by Step Description

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

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

			🏄 Microsoft Dyna	mics CRM					el Dohr 🥝
File Quote Add Cust	omize								mdohr 🚕
Save & New Save & New Save & Close	Look Up Recalculate G Address	et Print Quote for Customer	Create Activate Quote	Revise	Close D	CP Connect	Assign Sharing -	Run Workflow	Run Report -
Save		Actions					Collaborate	Process	Data
Information - General - Shipping	Quote Document	CorePack and	l ActivityTo	ols				Quotes	• • •
- Addresses - Administration - Notes	✓ General Quote ID * Name *	QUO-01000-C3V1T3	and ActivityTools		Revisi	ion ID *	0		
Related	Potential Customer*	A Store (sample)			Curre	*	💐 US Dollar		
✓ Common	Price List * Totals Detail Amount Quote Discount (%)	s1,500.00					- US Donar		
Documents Audit History Audit History Processe Workflows Dialog Sessions	Quote Discount Pre-Freight Amount Freight Amount Total Tax Total Amount	\$ \$1,500.00 \$ \$0.00 \$1,500.00 \$ \$1,500.00 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$							T
	Status	Draft							

We search and open the CRM-record we want to create a document for and start with a click on "Print in Word". In our case we will use a quote

Step 2: Select a template

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

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



Open Template			·			- 0 ×
pen Template se this Dialog to select a T	emplate for your Mail	lerae.				
		-			۵	•
Typ auswählen: Quote		-	•			
General						
Template Name	Created On	Subjects	Category	Keywords	Comments	
Quote.dot	18.02.2011 07:47:05					
QuoteWithGrouping.dot	18.02.2011 07:47:05					
L			1	1		
				[Open Temp	Cancel

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

Choose Word Template Web Page Dialog	? 🛛
WordMailMerge Add-On Error	
Security issue! Please make a screenshot and contact 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 busted sites in You will find a detailed description of how to solve this problem in the WordMailHerge documentation! If your have the issues contact a unsurefilmorem.	
Wiederholen	
http://dev-cm3:5555/WordMailMergeServer/choosetemplate.aspv?oType=1 🚱 Local intranet	



Step 3: Result

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

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

Ipen Template ave Template Isert MailMerge Fields	Choose Crea CRM Data Ad	te CRM Send ttivity as PDF	WordMailMerge Settings	2 Help	mdohr				
Templates	-	IRM Data	Settings	Help	Organization				
	To:	uote	e for MS CRM 3. te	<u>, 8 , 1</u>	· 9 · i · 10 · i · 1	Companyn Street1, 9999 City o Austria. Tel: +99 88 Eax +99 88	ame, f your companz	5 · I · 16 · I · 17 · I ·	18 - 1 - 19
	20175 R U.S. QuoteNr: QUO		1T3		Your Refu Michael D		Graz, t	februari 18, 2011	
F	Part Nr	Description			Unit	Quantity	Price (€)	Amount (€)	
1		DocumentsC	orePack			15,00	50,00	750,00	
2	2	ActivityTools				15,00	50,00	750,00	
							Sub Total	1.500,00	·

Now, the document is ready and we proceed at the <u>www.mscrm-addons.com</u> – ribbon at the top. (See next screenshot).

👿 🚽 🤊 - O 🗸					Document1	- Microso	oft Word
File Home	Insert	Page Layout	References	Mailings	Review	View	www.mscrm-addons.com
🕎 Open Template					<u> </u>	\bigcirc	
款 Save Template		94 94	PDF		.	\sim	
🍺 Insert MailMerge Fi	elds	Choose Create C CRM Data Activit	RM Send as Save by PDF ▼ DOC		ients Core Settings	Help	
Templates		Get MS	CRM Data	Se	ttings	Help	

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



4.2 Send as PDF

INFO: PDF-settings

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

😳 Documents Core Pack Settings		
Documents Core Pack Settings Change the default settings of Documents Core Pack.		
General PDF Settings About Documents Core Pack License Info		
☑ Delete PDF after attaching		
Attach document as PDF to the activity		
Use 'Send as PDF' with Outlook		
PDF Printer:	•	
	ОК	Cancel

aPDF Printer:

- MS Office Save as PDF Add-In for Office 2007 / 2010 (free Download)
- PDF Creator (<u>free Download</u>)

Step 1: Click on "Send as PDF"

Click on the button.



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



🕘 🗢 📙 🕨 Michi	ael Dohr 🕨 Eigene Dokumente 🕨 👻 🍫	Eigene Dokumente du	rchsuchen 🔎
Organisieren 👻 🛛 No	euer Ordner		• 🔞
🔆 Favoriten	A Name	Änderungsdatum	Тур
🧮 Desktop	📕 Camtasia Studio	10.02.2011 16:16	Dateiordi
🐌 Downloads	Documents+Core+Pack+Client+for+MS	11.11.2010 17:53	Dateiordi
📃 Zuletzt besucht	Eigene virtuelle Computer	06.09.2010 13:18	Dateiordi
	💼 Meine Datenquellen	22.12.2010 13:26	Dateiordı
门 Bibliotheken	My Meetings	14.10.2010 14:56	Dateiordı
📔 Bilder	퉬 My Weblog Posts	02.09.2010 14:35	Dateiordı
📑 Dokumente	🌗 OneNote-Notizbücher	21.12.2010 11:19	Dateiordı
🌙 Musik	🎉 SQL Server Management Studio Express	05.10.2010 11:11	Dateiordı
H Videos		04.01.2011 11:15	Dateiordi ▶
Datei <u>n</u> ame:	RMDocument129424891179068239.pdf		•
Datei <u>t</u> yp: PE	0F files (*.pdf)		•

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

Step 2a: Result – "use Send as Pdf with Outlook"- UNCHECKED

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

File E-mail Customize	للادمين المراجع ا المراجع المراجع ا	Dohr 🥝 dohr 🚕
Send Save Save & Send Save Save &	Attach Insert Insert To Connect Add to Queue Item Assign Report. Winflow Dialog Report.	
Save	Include Convert Activity Collaborate Process Data Final Final Final E-mail Messages At least one recipient does not have an e-mail address or is marked as 'Do Not Allow' e-mail.	\$
Related Common Audit History Processes Vorkflows Dialog Sessions		
	Reparding DocumentsCorePack and ActivityTools	
	Status Reason Draft	



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

File E-mail Cust	tomize		List Tools I Attachn						4	Micro	soft Dy	/nami	ics CRN	1												Mi	chael D mc	ohr 🕝 ohr 🛆
New E-Mail Attachment Records		Sta v Dial	irt og																									
Information - E-mail - Attachments Details			E-m Inf	orm	atior	-	not ha	we an	e-ma	il add	ress of	r is ma	arked	as "De	Not 4	Mow	e-ma	il.						E-ma	il Mes	sages	•	\$ \$
Related A Common Solution A Connections Audit History			Attachn																									
Processes Workflows Dialog Sessions				ile Nar							nent /	Asso			ew 🔻		97,0	02			Searc	th for	reco	rds				0 2
												CRME	Docum	nent12	294248	39117	90682	39.pc	łf									
			1 - 1 of All		lected) B	C	D	E	F	G	ні	[]	J K	L	М	N	0	Ρ	Q	R	S	T	U	V	W	X	age1 Y	2
			Details us Reaso	n	D	raft																						_

Step 2b: Result – "use Send as Pdf with Outlook"- CHECKED

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

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

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

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

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

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



ull Name	Address 1: City	E-mail
eas List	Graz	andreas.list@mscrm-addons.com
an Ternek	Graz	christian.ternek@gmail.com
Ternek	Graz	josef.ternek@mscrm-addons.com
ntact1		
n Dumitrascu	Redmond	someone@example.com

How to set this up in the template:

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

I	File	Home	Inser	t Page	Layout	Reference	s Mailings	Review	View	Develo	per www.m	scrm-addons.com	
		Template emplate	ß			PDF	Ö	0	Open LOG Delete LO				
	Insert	MailMerge	Fields	Choose CRM Data	Create CRN Activity	4 Send as PDF ▼	Documents Core Pack Settings	Help	Open late	st 💌	PTM EDV Systeme GmbH		
	Te	emplates		Get	MS CRM D	ata 🔄	Settings	Help	Debi	ug	Organization		

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

C2	DocumentsCorePack Task Pane 🔹 🗙
	Select type: Account
	Select type: Account
	Normal Additional Template Settings < > ×
	New Relationship/Entity
	Existing Tables
	Contact (table1) 💽 🔀 🖉
	- Account
	- Address 1: Address Type
	- Address 1: City
	Address 1: Country/Region
	- Address 1: Freight Terms
	- Address 1: ID
	- Address 1: Latitude
	Address 1: Longitude
	Address 1: Name
	- Address 1: Phone
	Address 1: Post Office Box
	Address 1: Primary Contact Name
	- Address 1: Street 3
▼	Address 1: Telephone 2
*	
0	
Ŧ	Insert



Click on the red marked button to get to the advanced settings.

DocumentsCorePack	×
S Configure Fields and Datasource	
In this dialog you are able to configure the fields, tables and relationships you need for your docum	ent
	-94 M.
Designer FetchXML ResultXML	
Select existing Relation	_
Relationships C Separate Entities	
Helationships C Separate Entities	
Account -> Contact [parentcustomerid]	<<
Attributes show all available Fields	_
Address 1: Address Type	•
Address 1: City	
Address 1: Country/Region Address 1: Country	
Address 1: County	_
Address 1: Freight Terms	
Address 1: ID	
Address 1: Latitude	
Address 1: Longitude	
✓ Address 1: Name	
Address 1: Phone	
Address 1: Post Office Box	
Address 1: Primary Contact Name	
✓ Address 1: Shipping Method ✓ Address 1: State/Province	
Address 1: State/Province	
Address 1: Street 2	
Address 1: Street 3	
Address 1: Telephone 2	
Address 1: Telephone 3	-
Link-Elements	
Add	
Edit	
Edk	
Delete	
	1
Cancel OK	

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

DocumentsCorePack	<u>Ľ</u>
Configure Fields and Datasource	
In this dialog you are able to configure the fields, tables and relationships you need for your document.	
Designer FetchXML ResultXML	
Select existing Relation	Advanced Settings
Relationships C Separate Entities	Entity Contact V TO
Account Contact [parentcustomerid]	>> To accountid v (Source)
	From parentcustomerid v (Target)
Attributes	From parentcustomerid v (Target)
Attributes show all available Fields	Type outer v
Address I: Address Type	
Address 1: Cuty Address 1: Country/Region	Alias * parentcustomenid
Address 1: County region	Filter
Address 1: County	
Address 1: Freight Terms	Add QID
Address 1: ID	Edit
Address 1: Latitude	EOR
Address 1: Longitude	Delete
Address 1: Name	
Address 1: Phone	- Sort order
Address 1: Post Office Box	
Address 1: Primary Contact Name	Column Asc/Desc
Address 1: Shipping Method	* • •
Address 1: State/Province	*
Address 1: Street 1	
Address 1: Street 2	
Address 1: Street 3	
Address 1: Telephone 2	4
Address 1: Telephone 3	
Address 1: UPS Zone	Records to Show
Address 1: UTC Offset Address 1: ZIP/Postal Code	C Show all records
Address 2: Address Type Address 2: City	Show a look up window to select a single row.
Address 2. Country/Region	C Show a look up window to select multiple rows.
Address 2: Country region	Column order
121	
Link-Elements	Column Width(px)
	Full Name 🔍 300
Add	*
Edit	
Data	
Delete	
	Cancel DK

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



4.4 How to filter linked entities during a merge process

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

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

Name

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

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

Value

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

• Structure:

<filter>

<entity><<logical name of the linked entity which should be filtered>></entity><values>

<value><<ID of linked record which should be shown>></value> <value><<ID of linked record which should be shown>></value>

...... </values> </filter>

• Example:

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

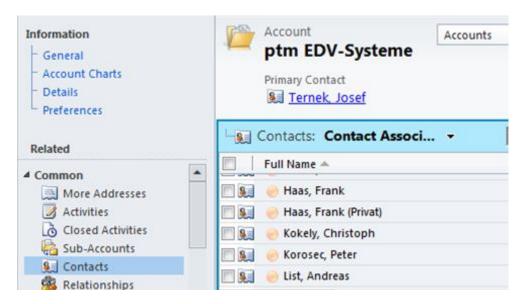
Important: The IDs must be in upper case and must contain brackets.

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



Example

Here you can see an account named "ptm EDV-Systeme". It has several contacts related.



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.

MSCRM-ADD AMPreFile	DONS.com User/Temp Settings ter {C9D75E9F-1336-E111-945B-00155DC8AE09} account {BD917846-5CAE-E
▼ General	
Name *	AMPreFilter (C9D75E9F-1336-E111-9458-00155DC8AE09) account (BD917846-5CAE-E111-8A50-00155DC8AE09) contact (FE6A9F9C-57C4-E111-A7C1-00155DC8AE09)
Value	<fiiter> <entity> new_personaldispo </entity> <values> <value> (12E5214A-888F-E111-A7C1-00155DC8AE09) </value> > <value> (00689F9C-57C4-E111-A7C1-00155DC8AE09) </value> </values></fiiter>
Notes	
Status	Active



4.5 Create CRM Activity

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

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

WordMailMerge V.: 5.1.4030.26746 Expires on 1	8.02.2012	
Do you want to create an activity ? Subject:		Subject of the activity you want to create.
Options	•	
Which activity type should be created? Letter Email close activity after creation Outgoing 	Fax Attach document	Selection of the activity-type.
	OK Cancel	Besides the direction, you can also select whether the activity should be completed or not.

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

Result

File Quote Add	List Tools Customize Activities	<u> </u>	Microsoft Dynamics CRM				Michael Do mdo	ohr 🞯 ohr 🛆	
Add New Add Existing Edit	4	Include	Assign Activities 🛛 🔂 E-mail a Link	Filter	Chart Pane -		ort - Activities		
Records	Actions		Collaborate	Current View	View Pr	ocess	Data		÷
Information	File Letter Customize		🕌 Microsoft Dy	mamics CRM				Michael Dohr (mdohr	
- Shipping - Addresses - Administration - Notes	Mark Complete Save Save & Close	Attach Add File Note		connect	Add to Queue Item Queue Octails	💭 Sharing ↓ 🌇 Copy a Link 🐨 E-mail a Link	Run Start Workflow Dialog	Run Report -	
	Save	Include	Convert Activity		Collaborate		Process	Data	
Related	Information	Letter					Activities	▼ ☆ ∛	F
Common Products Q Other Contacts	Related	DCP+AT_C	•						-
Activities	▲ Common	Sender	S Michael Dohr	Q	Address				
Sonnections	Sonnections Audit History	Recipient Subject *	DCP+AT_guote	t <u>vTools</u>	Direction	C Incoming C Outgoing			
Documents Audit History Processes Workflows	Processes Workflows Dialog Sessions	Description Unit Quantity Price Amount	שערדאו עטעני						
Dialog Sessions								•	
		Regarding	DocumentsCorePack and Activit	tyTools				ā	
		Owner*	S Michael Dohr					Q	
		Duration		\sim	Priority	Normal		Ψ	
		Due		\sim					
		Category			Sub-Category				
									-
		Activity Status	Completed						



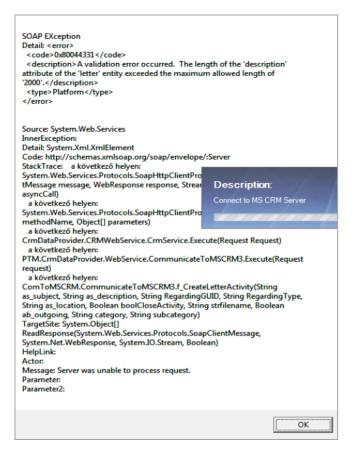
The Word-document has been added to the "Notes" tab.

INFO: When using SharePoint or the FileExplorer integration, the document will be saved to the specified location and the activity contains a direct link to the document.

4.5.1 Troubleshooting: how to extent the length of the CRM "description"-field

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

Fail: Soap Exception



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



Attribu Desc	ription of Letter						
etails:	g General						
Information	Schema		Туре				
	Display Name *	Description	Type *	intext	1		
	Name *	description	Maximum Length *	20,000			
	Requirement Level *	No Constraint	IME Mode *	auto	*		
	Searchable	Yes					
	Description						
	Description of the letter as	ctivity.					

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

Settings	Customize Entities	
Administration	View: Customizable Entities	
Customization Templates	Them Dubleh X More Actions -	

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

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

	ew - Windows Internet Exp	plorer			a.	
(A) In Gave an	t Cose 🔓				01	pip -
4	inscrim addons key					
Details:	2 General Notes					
Information Git Workflowers	Keyfiane	DoNotFilDescriptorField	Owner*	S Utwareloc Administrator		۲
	CachedAttribute	C'Yes @ No				
	Keylalue	true			-	
					T	



4.6 Save as DOCX: Saving documents back to CRM without creating an activity

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

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

To take adavantage of this new feature you need at least the following version:

DocumentsCorePack Client for MS CRM 2011 5.91

Specification

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

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

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

👿 🛃 約 - び 🖃				Document1	- Microsoft	t Word
File Home Inse	rt Page Layout	References	Mailings	Review	View	www.mscrm-addons.com
 [™] Open Template [™] Save Template [™] Insert MailMerge Fields 	Choose Create CRI CRM Data Activity	M Send as Save a PDF + DOCX		ents Core ettings	Help	
Templates	Get MS CR	KM Data	Save as P Save the documen	current	elp	
		-	Save as X Save the documen	current		
			Save as D Save the documer			
			Save as D Save the documen			
		007	Save as C Save the documen	current		
		X	Save as Save the documen	current		

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



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

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

Configuration

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

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

👿 🛃 🎝 - छ 🗸			Document	1 - Microsofi	t Word	
File Home Inse	rt Page Layout	References	Mailings Review	View	www.mscrm-addons.com	
 Open Template Save Template Insert MailMerge Fields Templates 	Choose Create CRM CRM Data Activity Get MS CRI	I Send as Save a PDF → DOCX M Data		(2) Help Help	- · · ·	
Documents Core Pack Settings Documents Core Pack Settings Change the default settings of Documents Core Pack.						
,	Account suments added to CRM is	Ribbon	n settings eate CRM Activity' - Butt ow 'Change Organization nd as PDF' - Button visit ve Document' - Button v	n' - Button ble		

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



4.7 How to protect documents using a macro DocX

Protecting the generated document is possible due to DocX and macros.

Open the template and add following macro to the template. Save it with the file extension .Docm.



The macro will ensure that the created document is protected with a password.

The DCPMacro will be called after generating the document.

Other macros you could use are:

Macro-Name	when will it will be called from the code
DocumentsCorePackMacroBeforeCreateActivity	this macro will be called before the activity is written to CRM
DocumentsCorePackMacroAfterCreate	this macro will be called after the activity is successfully created

Example:

If you want that the Document Information Panel is visible, you could add following macro which will be executed before the activity is created and saved:

```
1 Sub DocumentsCorePackMacroBeforeCreateActivity()
2 With Application
3 .DisplayDocumentInformationPanel = Not .DisplayDocumentInformationPanel
4 End With
5 End Sub
```



5 **Performing a mail merge with many records**

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

This includes:

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

5.1 Create letter for many records – Step-by-Step Description

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

Step 1: Open Word and choose a template

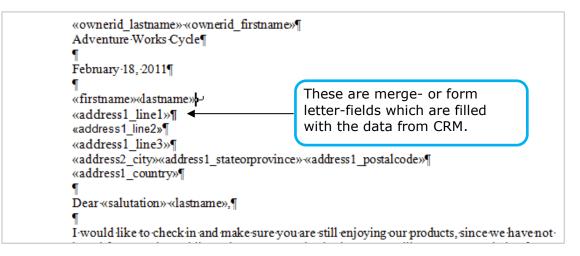
The templates are separated by entities, this means that every template belongs to an entity. Click on "Open Template" in "DocumentsCorePack for MS CRM".

J -7 - 0 -								D
atei Start Einfüg	gen Se	itenlayout	Verwei	se S	endunge	n Üb	erprüfen	Ansi
Open Template Save Template Insert MailMerge Fields Templates	Choose CRM Data Get	Create CRM Activity MS CRM Dat	as PDF	Set	iailMerge tings tings	Pelp Help	mdohr Organizatio	n
Open Template Ipen Template se this Dialog to select a Templat	-	Merge.	-					
Typ auswählen: Contact		• •			_	Choos	se an en	tity
Template Name		ated On	Subjects	Category	Keywords	Comments		
Contact Reconnect - Gift Certific List of Accounts related to this C		02.2011 07:47:06 02.2011 07:47:06						
List of Contacts related to this Co	A	02.2011 07:47:06						
List of availa	ble ten	nplates						
	I			Open	Templ	Cancel	1	

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



A document based on the selected template will be opened.



Step 2: Choose CRM Data

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

W	רי סי די סי די	The Constant	Trapense .		Do	ocument	ts_Core_Pac	k_User
Datei	Start	Einfügen	Seitenlayout	Verwei	se Sendungen	Üb	erprüfen	Ansi
ave 1	Template Femplate MailMerge	ET LL L	ose Data	Send as PDF	WordMailMerge Settings	(2) Help	mdohr	
Т	emplates		Get MS CRM Da	ata	Settings	Help	Organizat	ion

Step 3: Search Window

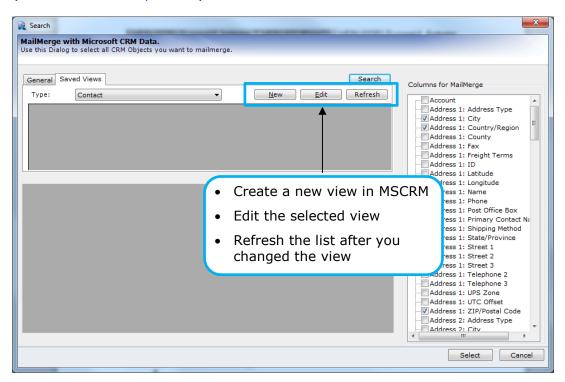
The search window appears.

Rearch	×
MailMerge with Microsoft CRM Data. Use this Dialog to select all CRM Objects you want to mailmerge.	
ose this blandy to select an CKM objects you want to mailmeige.	
General Saved Views	
	pr MailMerge
Find in: Contact Sort Select the en	- June
Name:	ress 1: Address Type
Field Condition Value	-VAddress 1: City VAddress 1: Country/Region
• • • • • • • • • • • • • • • • • • •	Address 1: County Region
	Address 1: Fax
	Address 1: ID
Ť	
	Address 1: Longitude
	Address 1: Phone
	Address 1: Post Office Box
	Address 1: Shipping Method
	Address 1: Street 1
Next to the "Name", search criteria can	Address 1: Street 2
	Address 1: Telephone 2
be defined for every attribute.	Address 1: Telephone 3
	Address 1: UPS Zone
	Address 1: ZIP/Postal Code
	Imit Address ∠: Uitv
	Select Cancel



Step 4: Using Saved Views

You can also use saved views that have been defined via an "Advanced Find" in MS CRM (More details in <u>chapter 5.2</u>).



Step 5: Select the records and click on the [Select] button

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

🙀 Sea	arch			×
Mail	Merge with Microsoft CRM Data.			
Use t	his Dialog to select all CRM Objects y	ou want to mailmerge.		
Ger	neral Saved Views	Rowco	ount:14 Search	Only and the Wellington
Fir	nd in: Contact	▼ Sort	•	Columns for MailMerge
	[Account
Na	ame:	Activ	ve Records	Address 1: Address Type
Fie	eld Condit	tion Value		Address 1: City
	•	•	•	Address 1: County
				Address 1: Fax
	•	▼	▼	
				Address 1: Latitude
	Full Name	Business Phone		
	Adrian Dumitrascu (sample)	555-0156		Address 1: Phone Address 1: Post Office Box
	Brain LaMee (sample)	555-0135		Address 1: Primary Contact Na
	Cat Francis (sample)	555-0178		Address 1: Shipping Method
	Cathan Cook (sample)	555-0158		Address 1: State/Province
			E	Address 1: Street 1
	Darren Parker (sample)	555-0156		Address 1: Street 2
	Eva Corets (sample)	555-0138		Address 1: Street 3
	Forrest Chand (sample)	555-0198		Address 1: Telephone 2
	Gabriele Cannata (sample)	555-0168		
	George Sullivan (sample)	555-0142		Address 1: UTC Offset
	Marco Tanara (sample)	555-0192		Address 1: ZIP/Postal Code
				Address 2: Address Type
	Patrick Steiner (sample)	555-0154	•	Address 2: City
				Select Cancel
<u> </u>				



The data will be loaded into MS Word. It will not automatically generate documents for each record (as the number of records could be e.g. > 500), but we can generate and write the documents back to CRM via "Create CRM Activity" (see chapter 4.5)

Step 5a: when using "docx"-templates

You will see the following dialog. This dialog shows you a list of the generated documents. (With versions prior 5.44 this dialog does not show up, instead every single document was opened directly in Word)

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

🍪 Bulk Merge			_ 0	23
Bulk merge How would you like to proceed with your generated Documents				
Temoporary filename	Name:	Yvonne McKay (sample)		
Result 1554595918.docx	Email:	someone_n@example.com		
Result 1555015310.docx	Phone:	555-0156		
Result 1555027761.docx	Mobile:			
✓ Result 1555040393.docx				
Result 1555053164.docx		Appointments		=
Result 1555065645.docx	1	rippomiments		
Result 1555078686.docx		-		
Result 1555091498.docx				
Result 1555104629.docx				
Result 1555117390.docx +	2	Tasks		
Total: 14 .::		1 45K5		
		-		
				-
Print Combine CRM Copy				*
Documents Documents Activity documents				Ŧ
			Close	
			Close	

Within this dialog you also have additional features:

• Print Documents:

Sends all the generated documents to your default printer; The printer itself or the settings can be changed within Windows printer settings.

• Combine Documents:

When this option is used, all generated documents will be combined into one big Word-document. This document will be opened after the process has finished.

• Create CRM Activity: See: Step 6 below

• Copy documents:

You can copy the temporarily generated documents to a location of your choice. During this step, the "DocumentName" property will be applied. In case of name conflicts, the name will be extended with a continuing number.



Step 6: Click on the [Create CRM Activity]

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

R WordMailMerge V.: 5.1.4030.267	746 Expires on 1	8.02.2012		x
Do you want to add an activity for even	ry row you selecte	ed?		
Subject:				
Options Which activity type should be cr	reated?			
Letter		🔘 Fax		
close activity after creation	Outgoing	n attach	document	
		OK	Car	icel

Step 7: Result

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

File Letter Customize		🕌 Microsoft Dynamics	CRM	Michael Dohr 🥝 mdohr 🔈
Mark Complete Save Save Save Save Save		G To Opportunity Convert Activity	Connet Add to Queue Item Leading Collaborate	Image: Workflow Image: Start workflow Run Report → Process Data
Information Letter Notes	Letter test			Activities 🔻 🛊 🔻
Related Common Connections Addit History Processes Vorkflows Dialog Sessions	Letter Sender Recipient Subject * Dohr Michael Adventure Works Cyce February 18 2011			ubject that we n step 6
	Regarding Regarding Owner * Duration Due Category	mple249 Alexander PI.	The description of activity contains of the Word-docu	the content

5.2 Using "Saved Views" to choose data

Step 1: Click on [Choose CRM Data]

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

Rearch		
MailMerge with Microsoft CRM I Use this Dialog to select all CRM Obje		
	·	
Genera Saved Views Find in: Account Name: Field	▼ Sort Value Condition Value Value Value Value	Account Number Account Rating Address 1: Address Type Address 1: City Address 1: Country/Region Address 1: Country/Region Address 1: Fax Address 1: Fax Address 1: Fax Address 1: ID Address 1: Langitude Address 1: Longitude Address 1: Primary Contact Ni Address 1: State/Province Address 1: Street 1 Address 1: Street 3 Address 1: Teet 3 Address 1: Teet 3 Address 1: Teet 3
		- Address 1: Telephone 3 - Address 1: UPS Zone - Address 1: UTC Offset
		Address 1: ZIP/Postal Code
		Select Cancel

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

 Search MailMerge with Microsoft CRM Data. Use this Dialog to select all CRM Objects you want to mailmerge. 	<u>×</u>
General Saved Views Type: Account Click here to create a new query	Search Columns for MailMerge Account Account Name Account Number Click here to refresh the window Region
Click here to an existing qu	- Address I: Londitude



Step 2: Choosing the view

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

Search	-				_	
ailMerge with Micros se this Dialog to select al	oft CRM Data. I CRM Objects you want t	mailmerge.				
General Saved Views					Search	Columns for MailMerge
Type: Account	I Redmond	•	<u>N</u> ew	<u>E</u> dit	Refresh	Account Name Account Number Account Rating Address 1: Address Type Address 1: Country/Region Address 1: Country/Region Address 1: Country Address 1: Fax Address 1: Freight Terms Address 1: ID
List with all	 "Saved View	s"				Address 1: Latitude Address 1: Latitude Address 1: Latitude Address 1: Name Address 1: Post Office Box Address 1: Primary Contact N: Address 1: Shipping Method Address 1: State/Province Address 1: Street 1
						Address 1: Street 2 Address 1: Street 3 Address 1: Telephone 2 Address 1: Telephone 3 Address 1: UPS Zone Address 1: UTC Offset Address 1: ZTP/Postal Code
						< □ □ → Select Cancel

The results will appear. We can choose the records we want to use and go ahead by clicking on the [Choose] button. DCP will now load the data to Word and we can e.g. "Create CRM Activities" as described in <u>chapter 4.4</u> and <u>5.1</u>.



6 Sending Mails via Outlook

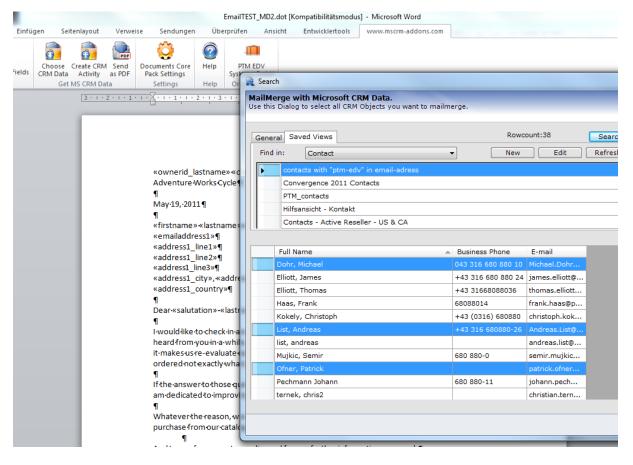
This chapter explains how DCP can be used to send emails containing the generated document.

To use this option you need Outlook installed on your client machine, and also the CRM Outlook Client. The entity that contains the email address of the recipient must be synchronized with Outlook to resolve the recipient during the sending process.

6.1 **Open template and load records**

First, we have to choose a template we want to use and load the CRM-records (contacts, accounts,...) that should receive the email. Therefore, we have to "Performing a mail merge with many records" as described in <u>chapter 5</u>.

In our example we use the "Gift certificate"-template that comes with the installation and select 4 contacts.



<u>Result</u>: The records will be loaded into the template. We can now proceed with a click on "Create CRM activity".



6.2 Create e-mail activity

A click on "Create CRM- Activity" brings up the following dialog. Selecting "Email" allows you to define some email-specific properties:

WordMailMerge V.: 5.7.4153.18939	
Do you want to add an activity for every row you selected?	<u> </u>
Subject:	
Gift Certificate	
Options Which activity type should be created?	
💿 Letter 💿 Email 💿 Fax	
close activity after creation Outgoing	
Sent on behalf of:	
Attachment:	
C:\Users\mdohr\Documents\TI_attributes.pdf C:\Users\mdohr\Documents\WYSIWYG_example.pdf	•
ОК	Cancel

Subject: subject of the created email

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

Attachment: allows to add some attachments like Terms & Conditions or any other document

In our example we are sending the "Gift Certificate" mail including 2 files to 4 contacts.

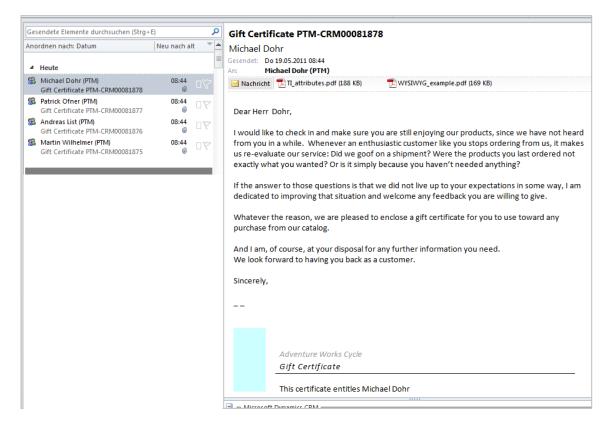
Everything is defined, so we can proceed with a click on [OK]



6.3 The Result

After hitting the [OK] button, Outlook will start sending the emails. Depending on the size of the document and number of attachments, this could take up to 3 seconds per mail.

Once the procedure is completed, we can see that the emails are appearing under "Sent Items" within Outlook:





The CRM-Outlook-client will synchronize the emails with CRM, so a CRM-email-activity will be created for each contact automatically and therefore appears in the activity/history of those contacts:

Add New Add Existing Edit Activity Add Existing Edit Activity Records	X Delete Activity	Mark Complete	e 🚺 🖄 Ad	ld to Queue C	Assign Activities	💭 Share 🔁 Copy a Li 🕞 E-mail a l	Filter	Char Pane View View	 Workflow
Information - General - Details - Preferences - Unspecified	E-ma	hr, Michael	lv.at		Parent Cust	DV-Systeme		ad "Demarding	Owner
Related					1.0		nclude: Relate		
▲ Common	Subj				Regard		Date Created	-	Actua
More Addresses		Certificate PTM-CRMC TESTMAIL_MULTIPLE_ TEST_INCLUDING_AT	ATTACHMENTS PTM		3 🧕 D	ohr, Michael	19.05.2011 16.05.2011 16.05.2011	Dohr, Micha Dohr, Micha Dohr, Micha	el
Closed Activities		TESTMAIL_INCLUDIN					16.05.2011	Dohr, Micha	
Sub-Contacts		PTM-CRM00081838	G_FICTORES FIM-CI	(1100001050			16.05.2011	Dohr, Micha	
EmailPreview	vide				2	,	13.05.2011	Dohr, Micha	
ActivityPreview		videos PTM-CRM0030	10996				13.05.2011	Steinklaube	
FileExplorer Docume		videos					13.05.2011		i, step
Information E-mail Attachments Usuatz Attachments Details Related Processes Workflows Dialog Sessions	you last ordered not If the answer to thos welcome any feedbi Whatever the reason And I am, of course, We look forward to Sincerely, Adv Gif	te PTM-CRM0008 exactly what you wan se questions is that we ack you are willing to g n, we are pleased to e at your disposal for an having you back as a cu	ited? Or is it simply i e did not live up to yo give. nclose a gift certifica ny further informatic	our expectatio	ons in some	way, I am ded			E
		-							
	Owner*	Dohr, Michael			ority	Normal			
-	Created By	Dohr, Michael		Cre	eated On	19.05.201	1	08:44	M
	🔟 E-Mail Attachmer	ts: Activity Attachm	ent Associated Vie	w +			Search for record	ds	Q
	🔲 🛛 File Name 🔺		File Siz	e (Bytes)					3
	T_attributes.pdf				89.327				
	WYSIWYG_examp	le.pdf		16	69.680				

As you can see in the screenshot, the content of the email appears in the "description" field of the activity and both files are attached.



7 DocumentsCorePack Settings (WordMailMerge settings)

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

7.1 General -tab

😳 Documents Core Pack Settings 📃 📼 💌				
Documents Core Pack Settings Change the default settings of Documents Core Pack.				
General PDF Settings About Documents Core Pack Lice	ense Info			
Default Entity: User	•			
Gobal Settings				
Activate Debugging	Outlook installed	\checkmark		
Automatically merge to a new Document.	CRM Outlook Client loaded	\checkmark		
	CRM Outlook Client is Offline capable	\checkmark		
	CRM Offline Client	۲		
	CRM Light Client	0		
☑ Default direction for documents added to CRM is 'OU	т			
Default closed letter status OUND				
Datasource HTML -				
	ОК	Cancel		

Settings:

- <u>Activate debugging</u>: required for support-issues only; The log-files contain detailed descriptions about what was happening in case of errors. As logging always comes with a decrease in performance, you should leave this setting deactivated unless a mscrm-addons- support team member asks you to activate it.
- <u>Default direction for documents added to CRM is ,Outgoing</u>': defines the default direction for created activities (letter, fax).
- <u>Automatically merge to new Document</u>: When checked, a new document will automatically be generated once the data is loaded. (e.g. after hitting the Print in Word button on a quote).
- <u>Datasource</u>: Choose the datasource that should be used for storing temp-data.



7.2 PDF-settings

Contains some basic settings regarding the "send as PDF" – functionality (see chapter 4.2).

Ocuments Core Pack Settings	
Documents Core Pack Settings Change the default settings of Documents Core Pack.	
General PDF Settings About Documents Core Pack License Info	
☑ Delete PDF after attaching	
Attach document as PDF to the activity	
Use 'Send as PDF' with Outlook	
PDF Printer:	-
ОК	Cancel

Settings:

- <u>PDF-Printer</u>: defines the PDF-printer that should be used Supported printers:
 - Office 07 / 2010 PDF-printer (**default**)
 - PDF Creator
- <u>Delete PDF after attaching</u>: Defines whether the temporarily locally saved PDF file should be deleted after attaching the PDF to the email activity.
- <u>Attach document as PDF to the activity</u>: By default, the document will be saved as a *.doc – file when using "Create CRM activity" (<u>see chapter 3.3</u>). This setting enables to save PDF files instead.
- <u>Use "Send as PDF" with Outlook</u>: If checked, the document generated by the "Send as PDF" –routine (<u>see chapter 4.2</u>) will be attached to an email in Outlook instead of an email-activity.



7.3 About DocumentsCorePack / License Info

🔅 Documents Core P	ack Settings				
Documents Core					
Change the default sett	ings of Documents Core Pack.				
	About Desureds Core Deal				
General PDF Settings	About Documents Core Pack	License Info			
DocumentsCorePack	for MS CRM 2011				
The Wordintegration	solution for MS CRM				
Version 5.7.4154.200					
Version 5.7.4154.200	05				
Copyright (c) 2011 PT	TM EDV Systeme GmbH				
Maintainance expires	-				
Maintainance expires	01. 14.01.2012				
License Information					
Business Unit:	PTMEDVSystemeGmbH				
					50 1007.0
Key:	HgU5poPQTS7fvdrMu9r53S	MaszZCRD/SD4ki18t	30jN/p8VVtAbt124w	/Wpwph3gzk	n5Omj0317
Active Users:	25				
		www.mscrm-addons.			
		www.mscrin-addons.	com		
				ОК	Cancel

• <u>About DocumentsCorePack</u> contains detailed information about the installed version and some facts about the currently used license.

WordMailMerge Settings Change the default settings of Documents Core Pack. General PDF Settings About Documents Core Pack License Info General icense information License Value Systemvalue Statu Licenseinformation License Value Systemvalue Statu Licenseinformation License Value Systemvalue Statu Licensekey HgU5poPQTS7tvdrMu9r53cg Licensekey installed Image the default settings License validation information License Value Systemvalue Status BusinessUnt mdohr mdohr Image the default settings Userinformation fullAccess accessPossible Image the default set licenses Number of site licenses 5 3 Image the default set license License for Readonly Users 0 0 Image the default set license License Summary LicenseValue Systemvalue Statu LicenseState valid Valid Valid	_	dMailMerge Settings			
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• <u>License Info</u>: shows details about the license (validity, type, users)



8 **Configure save-locations (SharePoint/FileShare paths)**

This chapter contains a detailed description about how to predefine SaveLocations for generated documents with the "Document Properties" (see chapter 3.3, subitem 5.1).

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

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

1) DocumentsCorePack Server Configuration (Server)

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

2) Document Properties (Client)

In the document properties of the template (<u>see chapter 3.3, subitem 5.1</u>) you can find a setting called "**SubFolder Name**" which allows you to specify a subfolder for the created document.

DocumentName	Editor 🛛					
	DocumentName Editor Define the name of the document					
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" <<companyname>>+' No.: '+<<quotenumber>>.left(5) returns "MSCRM-Addons No.: 12345"</quotenumber></companyname></quotenumber></companyname>					
	<u>O</u> K <u>C</u> ancel					

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

Please see (*DocumentName in on page 21) for a detailed description about this editor.



Examples:

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

Server-Settings

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

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

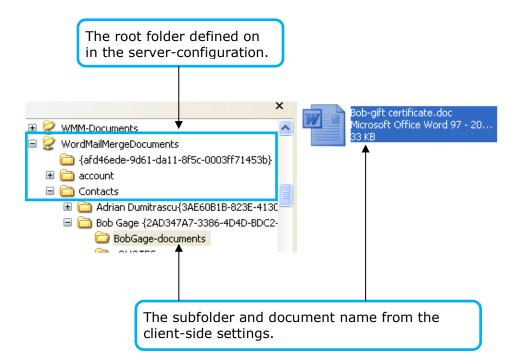
• <u>Client-Settings:</u>

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:	< <fuliname>>+'-documents'</fuliname>

• <u>Result</u>:

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





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

• Server Settings:

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

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

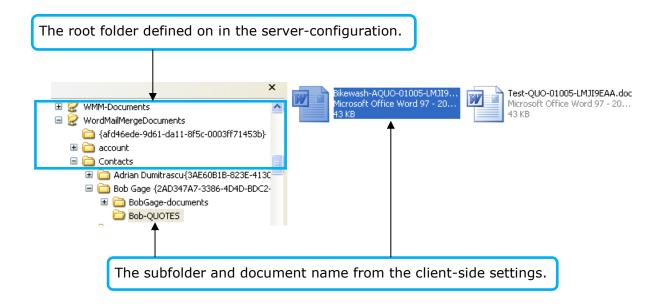
• Document Properties:

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

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

CreateActivitiesfor:	contact,customerid_contact_contactid	
Document Name:	< <name>>+''+<<quotenumber>></quotenumber></name>]
SubFolder Name:	< <customerid_contact_firstname>>+'-QUOTES'</customerid_contact_firstname>	

<u>Result</u>:



NOTICE: These operations are equal on SharePoint! (see implementation guide chapter 9.4)



9 Resolve an additional Relationship – Step-by-Step

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

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

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

Insert mailmerge	fields	x	8
Insert mailmerge fields Use this Dialog to insert mailmerge fields into your template.			
Select type:	Account (account)	•	Choose the entity for which you want to resolve the relation. (in our
Fields:	Document Properties		case it is account->salesorder)
Account			
- Account Name			
Account Number			
- Account Rating			
···· Address 1: City			
Address 1: Co	untry/Region		
Address 1: Co	unty		
- Address 1: Fa	x		
Address 1: Fre	Address 1: Freight Terms		
Address 1. ID			



Step 2: After that, we proceed with a click on "Document Properties" and switch to the "Extra Entity tab" (see page 23).

elect ExtraEntity:		
-		New
elationships:		
ExtraEntity		
Mainentity:	contact	
Displayname of Subentity:	Contact	
Subentity:		
surpress Mainentity:		
EntitiesExtraCurve		
Subentity:		
Foreign Key to Mainentityt:		
Mainentity:	contact	
Alias (optional):		
ExtraEntity		
Delete	Apply	Cancel
If you added a new ExtraE forget to press [Apply] befor decument!!		
WMM Properties		
ExtraEntity:		
EntitiesExtraCurve:		
M2MList:		
M2MCondition:		

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

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



Step 3: Choose relation

The combobox allows choosing any relation defined within MS CRM.

New
]
J
]
]
1
]

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



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

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

Insert mailmerge fie	lds	
Insert mailmer Use this Dialog to in template.	ge fields sert mailmerge fields into your	
Select type:	Account (account)	•
Fields:	Document Properties	
 Version Number Web Site Yomi Account N Bestellungen Created By Created By (Deleter Currency) Master ID Modified By Modified By Modified By (Deleter Currency) Modified By Modified By (Deleter Currency) Modified By Modified By (Deleter Currency) Bill To Addression Bill To Count Bill To Street <	lame egate) ecount ess ID act Name try/Region e e /Province t 1 t 2 t 3 Postal Code /pe d tted	▲ III
	Insert	
	Close	



10 CRM-internal features

DocumentsCorePack provides some useful additional features that improve the user-experience within MS CRM 2011

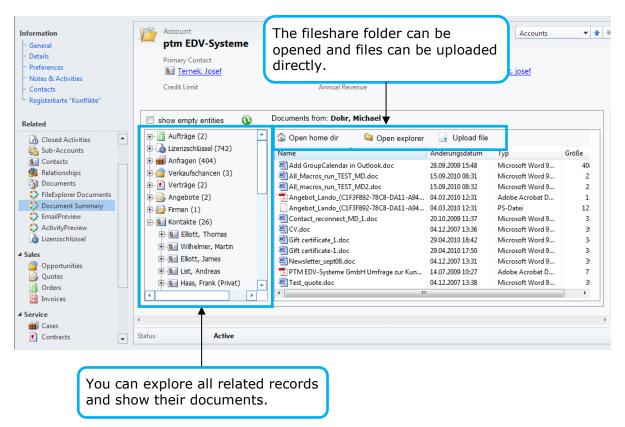
Those features are:

- 1) Document Summary
- 2) LineItemCount

Documentation on how to activate and configure the following point can be found in our implementation guide for DocumentsCorePack 2011 (server).

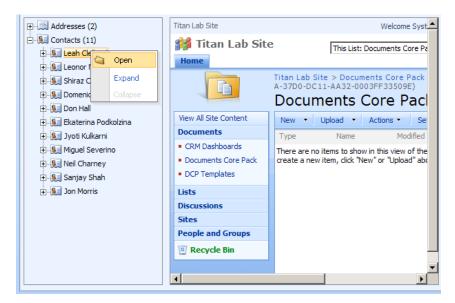
10.1 Document Summary

Enables you to show up documents saved to related records within CRM. With the document-summary activated (configuration see implementation guide chapter 9.5) you'll see a new navigation item in the side menu.





You can click on an e.g. contact to see the documents to this record. The right click menu on each node provides the opportunity to open up the entity or expand/collapse the tree.



The tree is recursive. This means that you can expand the tree downwards unless you reach the point where no further entities are related. e.g. open an account, expand the contacts, expand the invoices of a contact, etc.

Additionally, all the documents can easily be opened via double-click from within the Document Summary

11 Contact

If you have questions to the product send an Email to <u>support@mscrm-addons.com</u> or visit our blog <u>http://blogs.mscrm-addons.com</u>

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