mscrm-**addons**.com
DocumentsCorePack
for Microsoft Dynamics CRM

DocumentsCorePack Template Designer for MS CRM 2015/2016 and Dynamics 365

Ver.: 1.0, April 2017

Template Designer Guide
(How to work with DocumentsCorePack Template Designer for Microsoft Dynamics CRM 2015/2016 and Dynamics 365)

Content

Preamble

This documentation is intended to guide you through the generation and design process of templates in DocumentsCorePack.

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

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

Target Audience

This guide is intended for users designing templates for DocumentsCorePack who have the following minimum skills:

- Basic Knowledge of Microsoft Office Word
- Basic Microsoft Dynamics CRM/Dynamics 365 Knowledge

Purpose of the DocumentsCorePack template designer?

DocumentsCorePack Templates facilitates – among other things - the creation and modification of DocumentsCorePack Templates in Microsoft Dynamics CRM/Dynamics 365. It has predefined fields, so-called Mail Merge Fields. These are references to attributes in the Microsoft Dynamics CRM/Dynamics 365-system (For example Company, Address, Contact, ...).

Templates can be created for each MS Dynamics CRM/Dynamics 365 entity (For example Contact, Opportunities...).
They facilitate the generation of 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 (deprecated Word Standard and Office Open XML).

We recommend you to use the DocumentsCorePack Templates (docx) only because they are not limited to a single data source. Due to this fact, our DCP Templates can resolve any relationships between the entities. In the course of the next chapters, you will learn more about the basics of DocumentsCorePack template designer, how to create a completely new template and how to handle already created templates.

1 DocumentsCorePack Template Designer Basics

The DocumentsCorePack Template Designer is a locally installed add-in for Microsoft Office Word which enables you to

- insert placeholders for CRM Data (so-called 'Merge Fields') within templates.
- resolve relationships to gather data from related data from CRM records.
- insert advanced objects like QR-Codes or calculations based on CRM data.
- pull fields from standard and custom entities into templates.
- filter and sort once retrieved records in any imaginable way in the templates.
- handle one-to-many and many-to-many relationships easily.
- place if and else conditions in order to define conditional content inside templates.
- set culture and format of money, integer and decimal fields inside templates.
- generate dynamic document names and dynamic save locations for templates.
- insert dynamic pictures into templates
- insert hyperlinks into templates.
- define arithmetic operations and set the corresponding variables as CRM fields.
- insert sub-templates or other documents to the main document or template.
- configure various settings in the templates.

The DocumentsCorePack Template Designer can be easily accessed via the www.mscrm-addons.com – tab in the MS Word command bar.

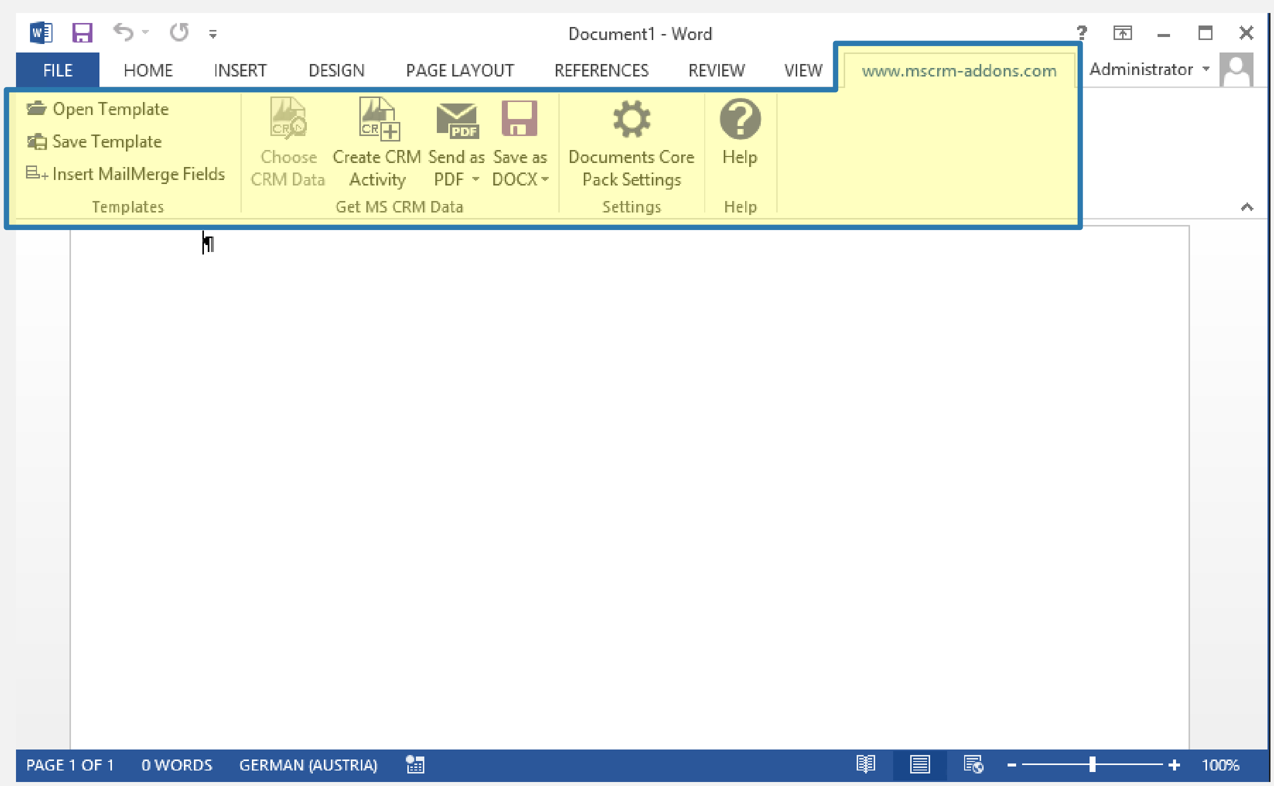


Figure 1: Microsoft Office Word with mscrm-addons.com Ribbon

1.1 The www.mscrm-addons.com tab

There are two main menu items in the www.mscrm-addons.com tab that facilitate the creation of templates:

The dashed line (1) marks the DocumentsCorePack Client functionality that does not belong to the Template Designer guide. This section is described separately in the DocumentsCorePack ClientBased User Guide.

While the left side contains the option to save and open templates, the right side does not belong to the default items of the command bar. It only appears after inserting a field from DocumentsCorePack Template Designer in order to manage the field properties.

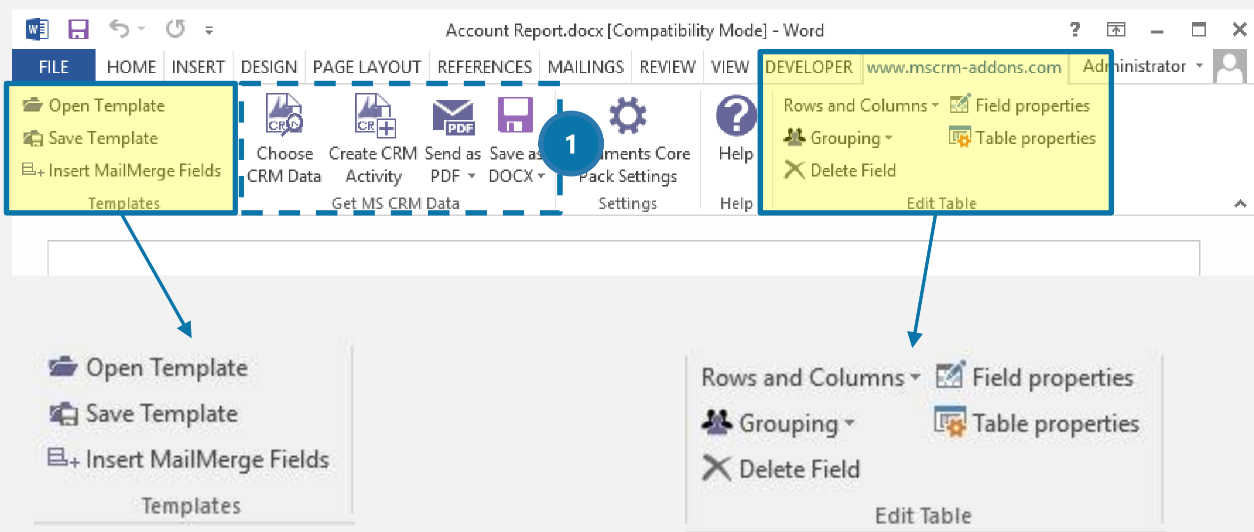


Figure 2: www.mscrm-addons.com tab details

The ***[Insert MailMerge Fields]*** button allows you to open an extended user interface to create a template from scratch.

1.2 How to open the DocumentsCorePack Template Designer

Clicking on ***[Insert MailMerge Fields]*** in the www.mscrm-addons.com-tab will open the DocumentsCorePack Template Designer.

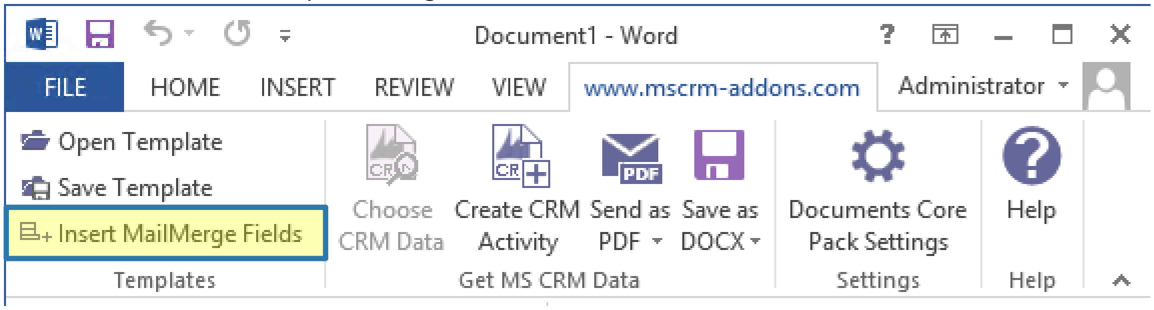


Figure 3: www.msccrm-addons.com tab

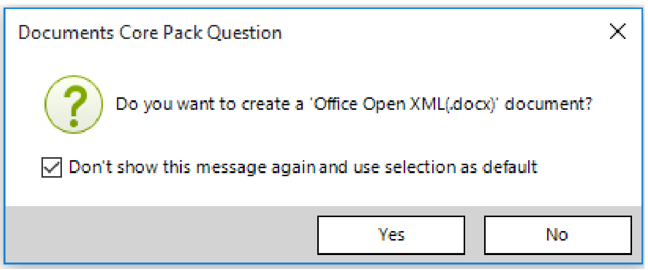


Figure 4: Office Open XML (docx) question

Depending on the configuration, the following message box could appear. Should this happen, please check the checkbox and click on ***[Yes]***.

After these steps, The Template Designer will appear on the right-hand side docked to your Word window.

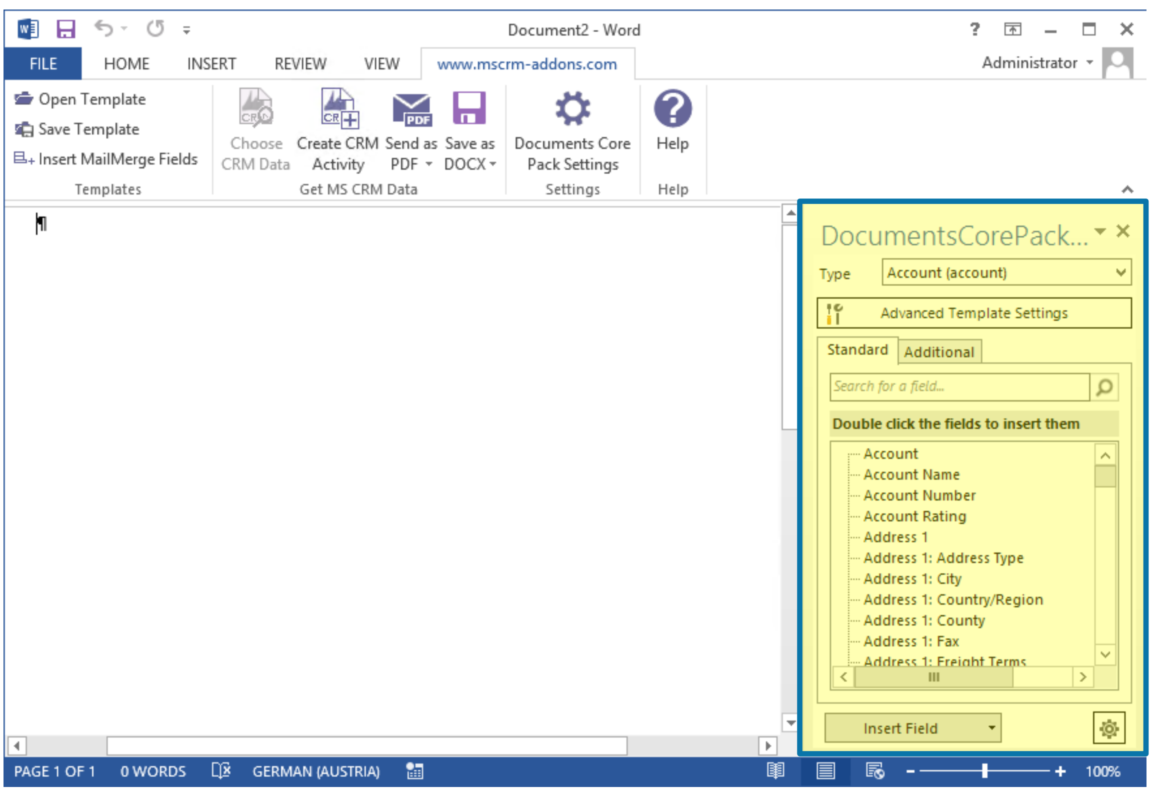


Figure 5: DocumentsCorePack Template Designer Taskpane in Word

1.3 The DocumentsCorePack Template Designer User Interface (Standard)

The DocumentsCorePack Template Designer is a task pane in Word which extends your local Word installation with the required tools to insert fields.

1.4 Standard

If you are viewing this document on your computer, you can click on the element to directly jump to the referenced topic.

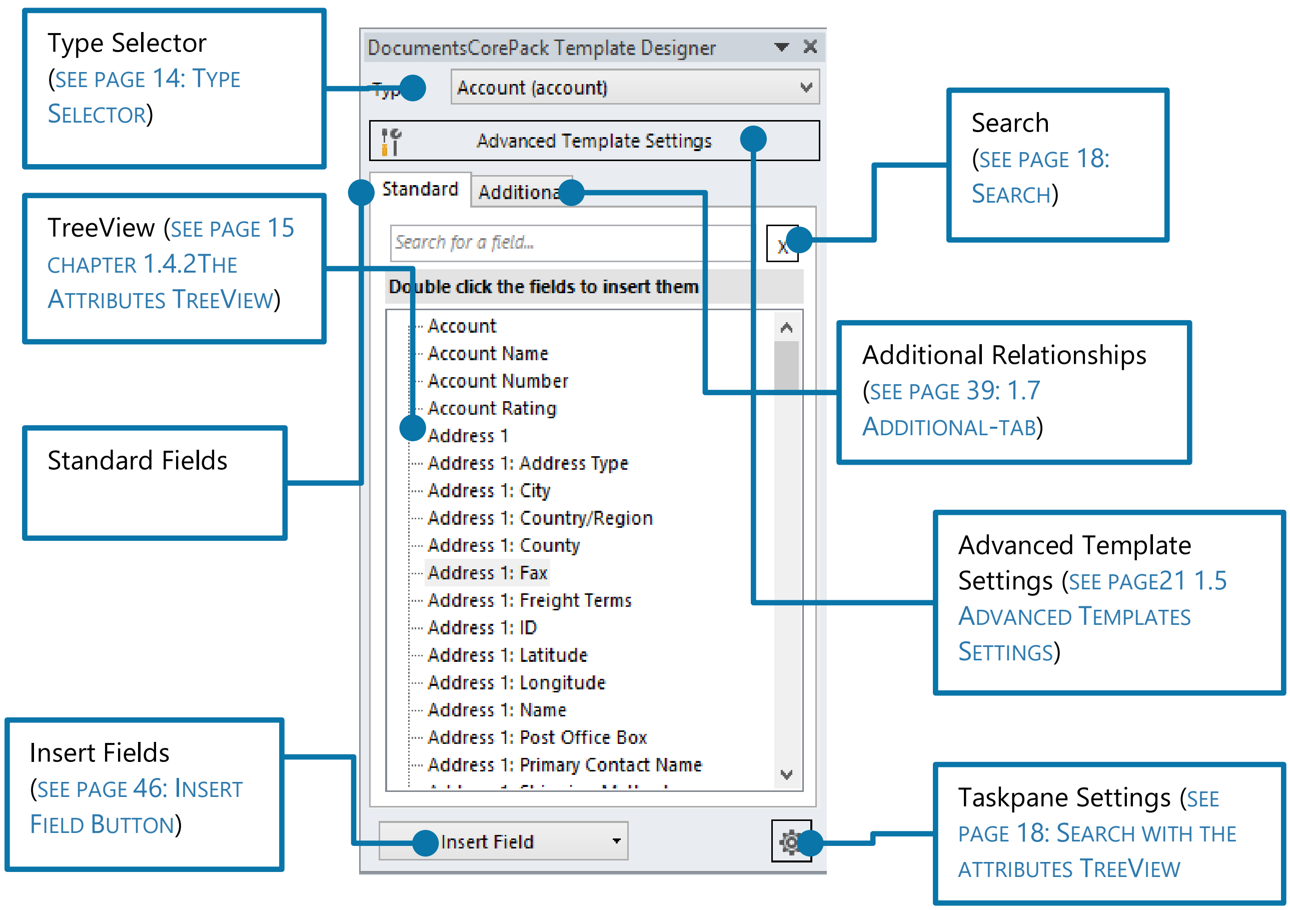


Figure 6: DocumentsCorePack Template Designer UI - Standard tab

1.4.1 Type Selector

The first step in creating a new template is always to select the entity the template should be based on. In the Type Selector-Drop Down Menu, every standard and custom entity is available. This selection is locked, as soon as a field is inserted, or a property is set.

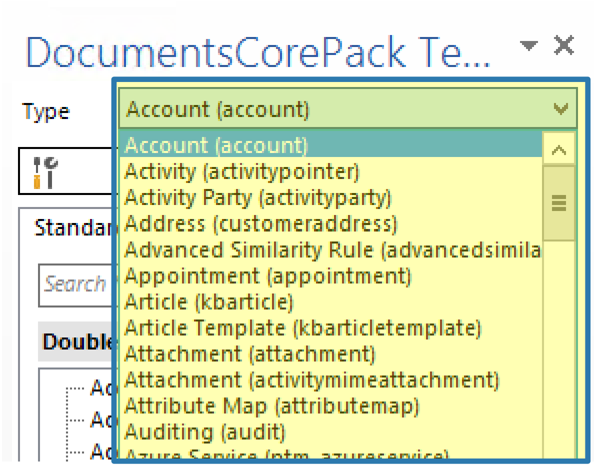


Figure 7: Type selector

1.4.2 The Attributes TreeView

The attributes TreeView displays all available attribute-fields of the entity that had been selected with the type selector previously. The fields are listed in a TreeView in the root section. Additionally, all related 1:N relationships form the CRM entity are display in the Standard Tab.

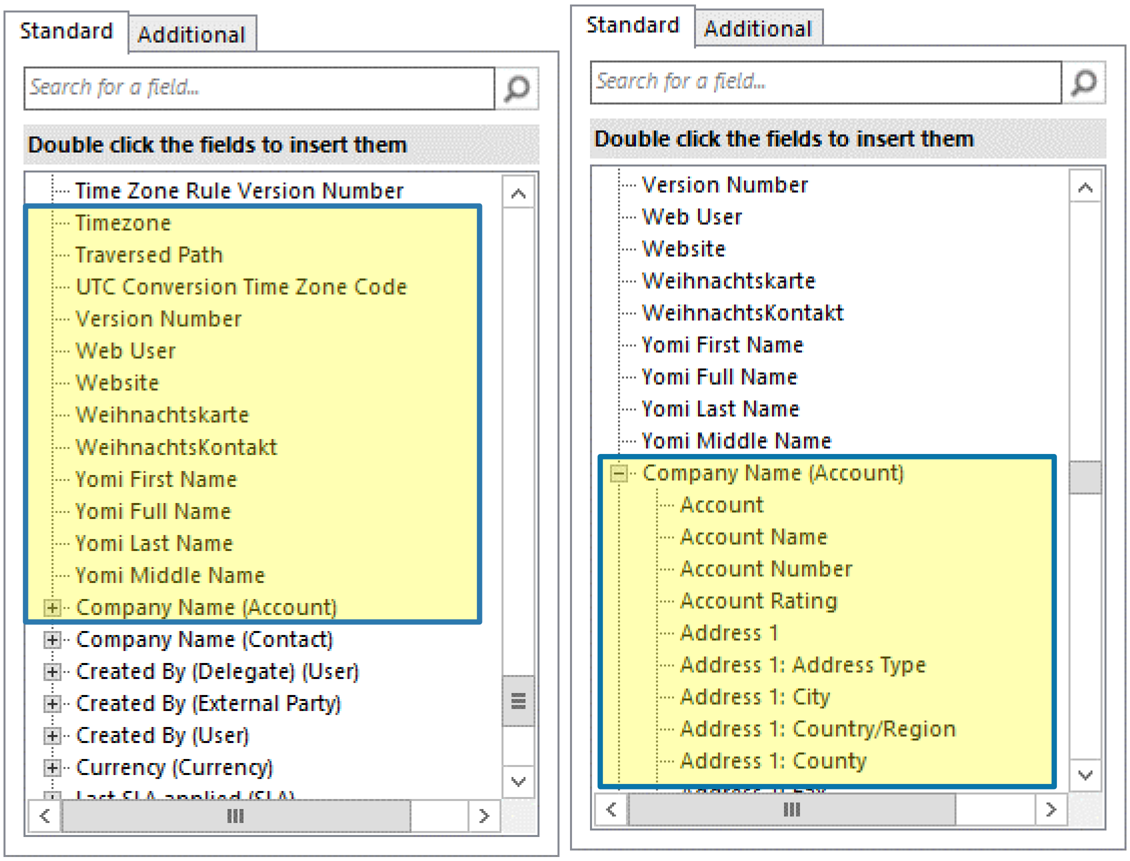


Figure 8: Standard fields of and standard fields of look up

The additional tab does not show the 1:N relationships automatically, as the relationship for the additional tab is defined separately.

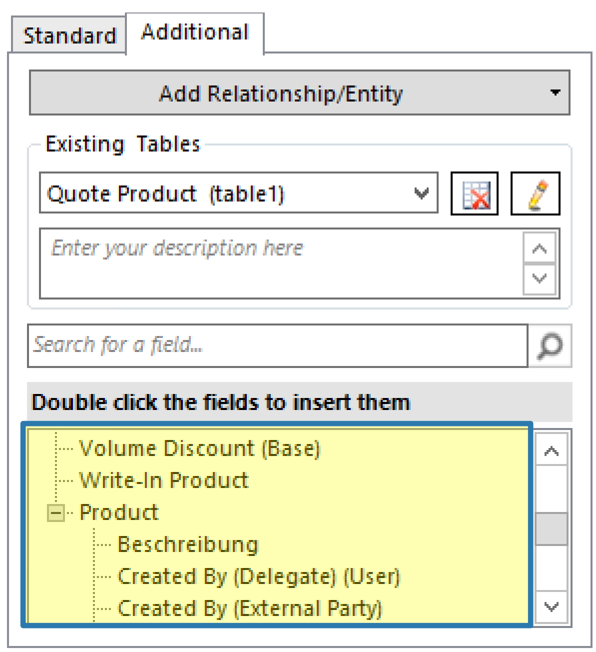


Figure 9: Treeview in the Additonal Tab

Hovering the mouse cursor over an element in the TreeView will provide users with a tooltip, which includes additional information about the field. (SEE: PAGE 18, 1.4.4 SEARCH WITH THE ATTRIBUTES TREEVIEW).

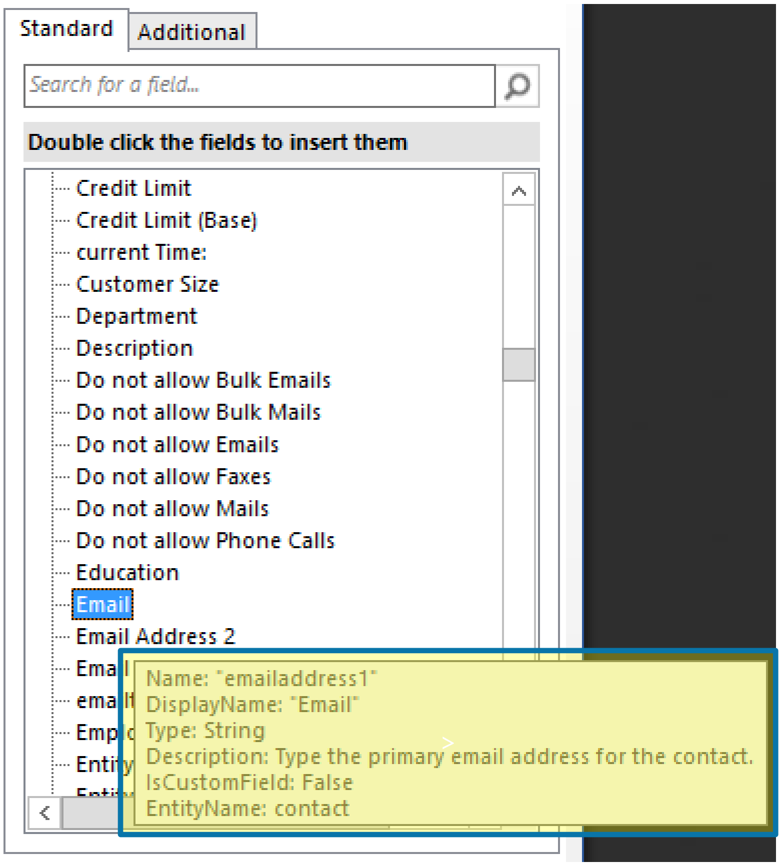


Figure 10: Tooltip of field

1.4.3 The Insert Fields button

This feature allows inserting additional contents in your .docx. The ***[Insert]***-button provides you with various insert options. It is a simple and centralized way to insert every MSCRM-field as a "special" field. To get an overview of your options, you need to follow two easy steps:

1. Select a field in the tree view of the DocumentsCorePack Template Designer
2. Click on the Drop-Down-menu of the ***[Insert field]***-button at the bottom of the DocumentsCorePack Template Designer:

Figure 11: Insert fields buttons

Opening the drop-down menu (2) provides you with a lot of options that are going to be described in detail in the next chapters:

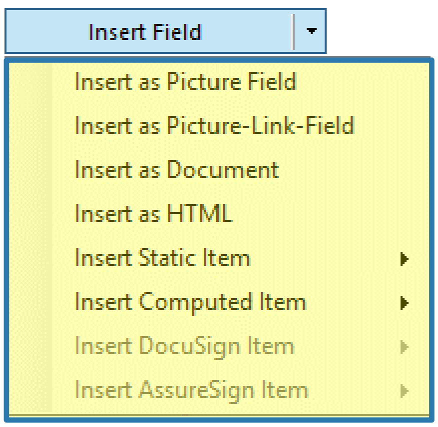


Figure 12: Insert Fields drop down

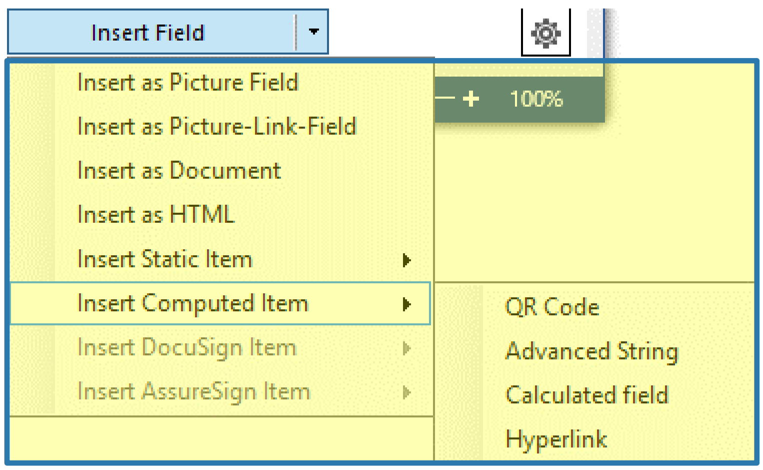


Figure 13: Insert fields drop down computed items

1.4.4 Search with the attributes TreeView

The search capability allows you to search the tree view for a specific field name. The search includes the display name, the schema name and the description depending on the configuration described in chapter 1.4.5.3 3 SEARCH OPTIONS. The "*" is a supported wildcard character. As a default, the search supports left truncation. Enter your search term in the textbox (left 1) and hit the magnifier button (left 2).

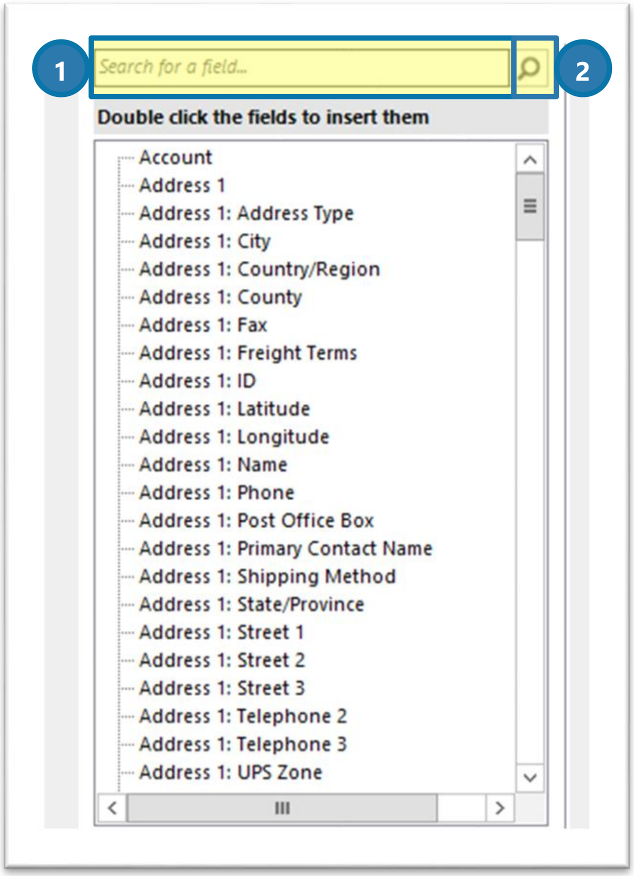


Figure 14: Attributes TreeView - Search

All fields that match the set search term (right 1) will be listed in a filtered view (right 3). To undo the search and see all available fields hit the ***[x]*** button (right 2).

Additional options related to the search can be set in the Taskpane Settings.

(SEE: PAGE 19, 1.4.5, TASKPANE SETTINGS)

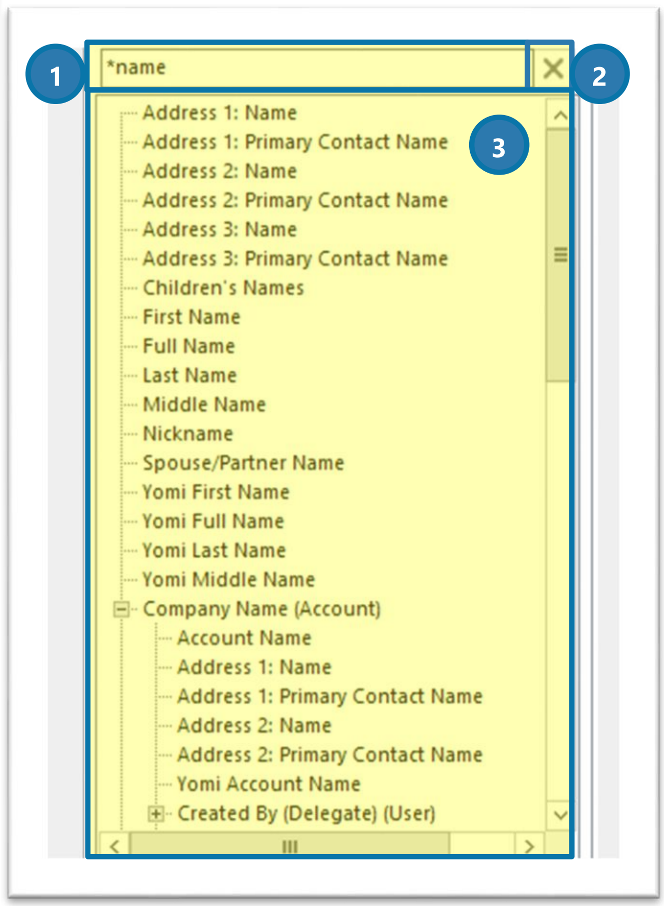


Figure 15: Treeview - Search result

1.4.5 Taskpane settings

The Taskpane settings allow you to the modify some of the behaviors of the TreeView containing the CRM attributes.

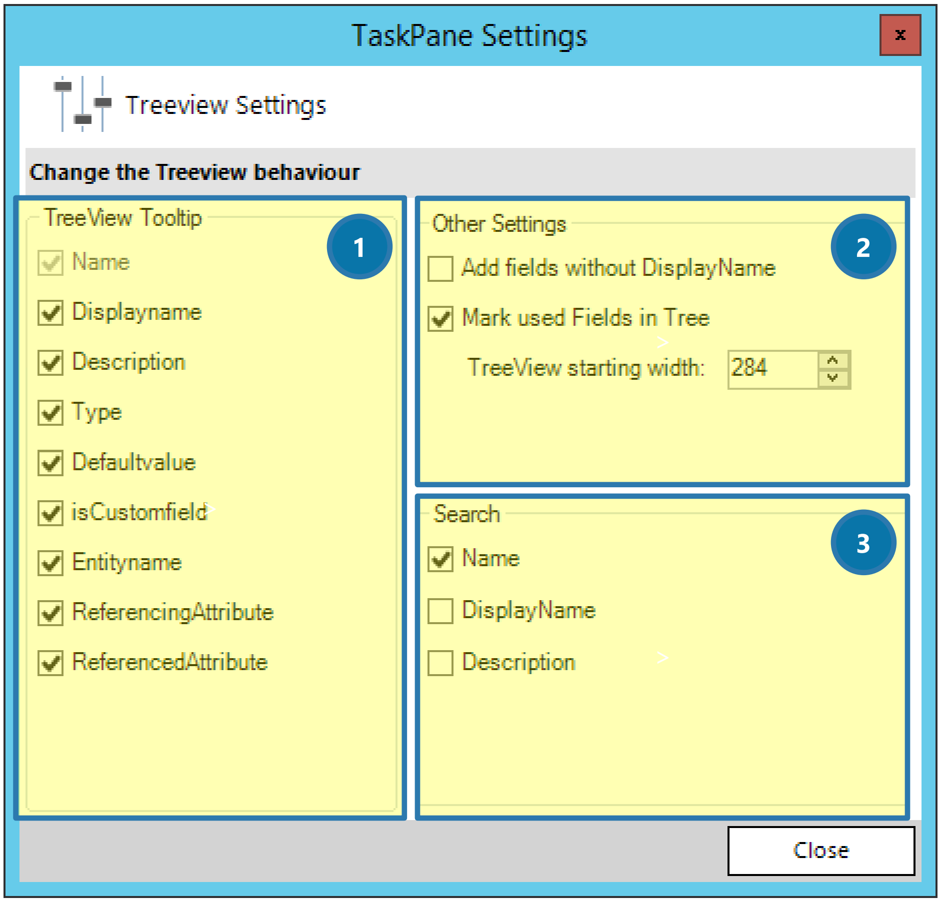


Figure 16: Taskpane settings

1.4.5.1 ① Tooltip options

A list of available additional information allows you to select the information about the field that you would like to see in the tooltip of the field.

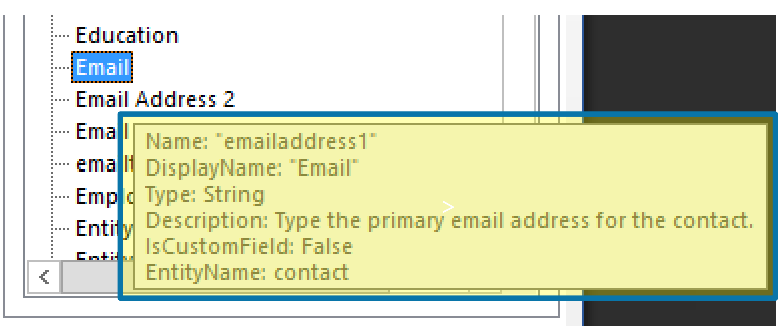


Figure 17: Tooltip of field in the attributes tree view

1.4.5.2 ② Other settings

"Add fields without Displayname": Certain fields in CRM are not intended to be used on CRM forms and therefore do not have a Dsiplayname. Nevertheless, you might have the requirement to use those fields in your template. With this option to you can enable these fields. The schema name of will be used and the name begins with "*" (asterisk).

"Mark used fields in Tree": If a field is already used in the document it will be bold.

"Treeview starting width": Allows setting the width in pixels when the task pane is opened in Word

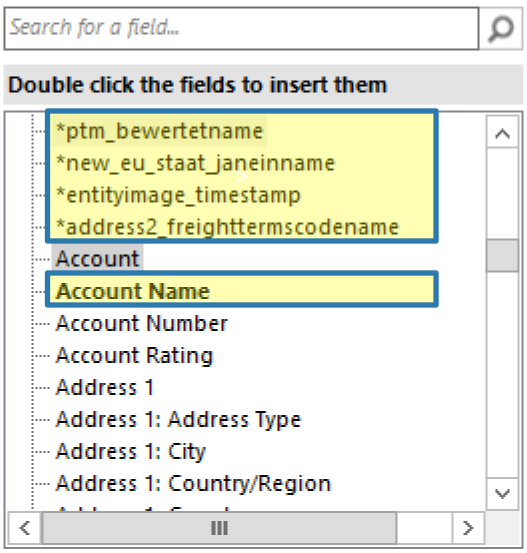


Figure 18: Fields without Displayname (top) and used fields (bottom)

1.4.5.3 ③ Search options

The available list of fields (Name, Displayname, Description) allows you to define with information of the CRM field should be included in the search.

The Name is the schema name in CRM which is usually an internal identifier (e.g. emailaddress1).

The DisplayName is the label which is also used on a CRM form (e.g. Primary Email).

The description is the text-block that contains additional information about the field. (e.g. the purpose or usage of the field).

1.5 Advanced Templates Settings

Clicking the ***[Advanced Template Settings]***-button will open a new window.

Figure 19: Advanced Template Settings button

The Advanced Template settings are divided into 3 major categories:

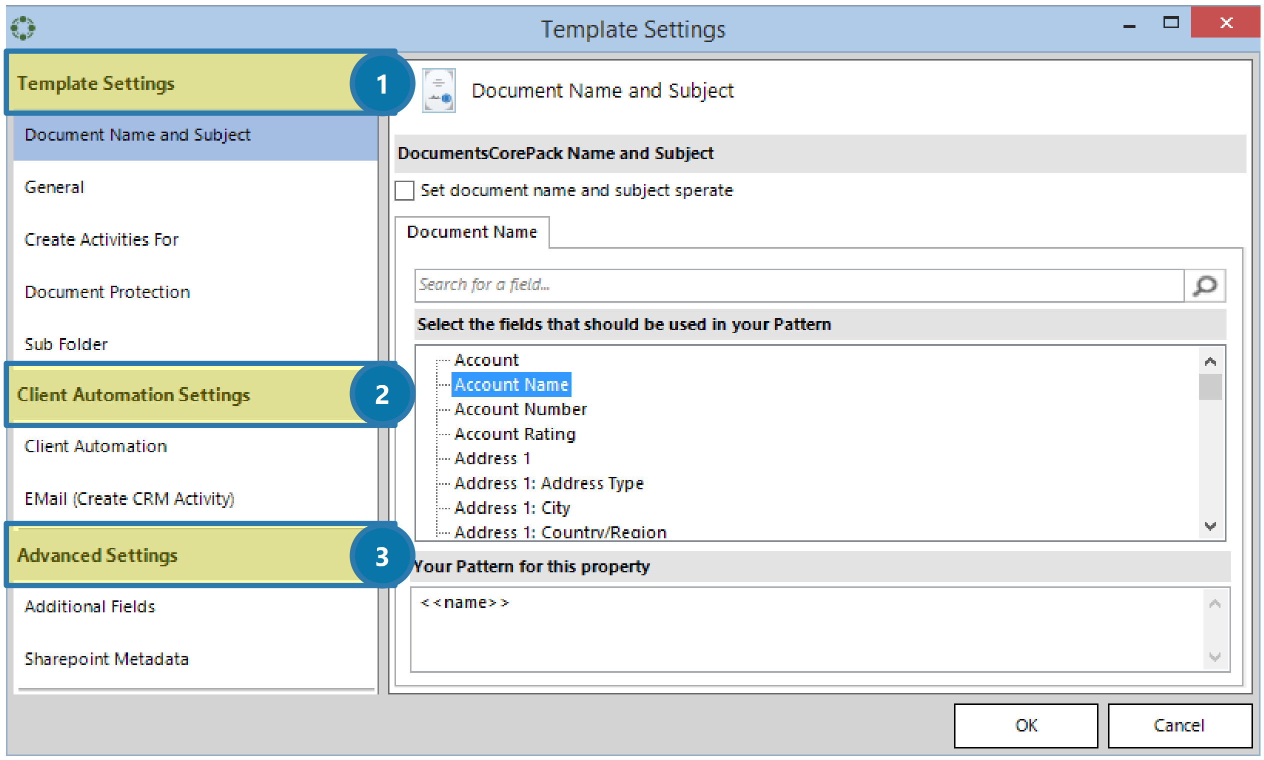


Figure 20: Templates settings categories

1 Template Settings

These settings describe the Documents behavior during the document generation.

This section contains the possibility to define:

2 Client Automation Settings

These settings are only for the DocumentsCorePack Client which is described here.

3 Advanced Settings

Includes several additional features for specialized template behavior.

1.5.1 Document Name and Subject

The "Document name" property allows you to define a name, or a name pattern for your template, ensuring that the future document has a pretty name the moment it is generated.

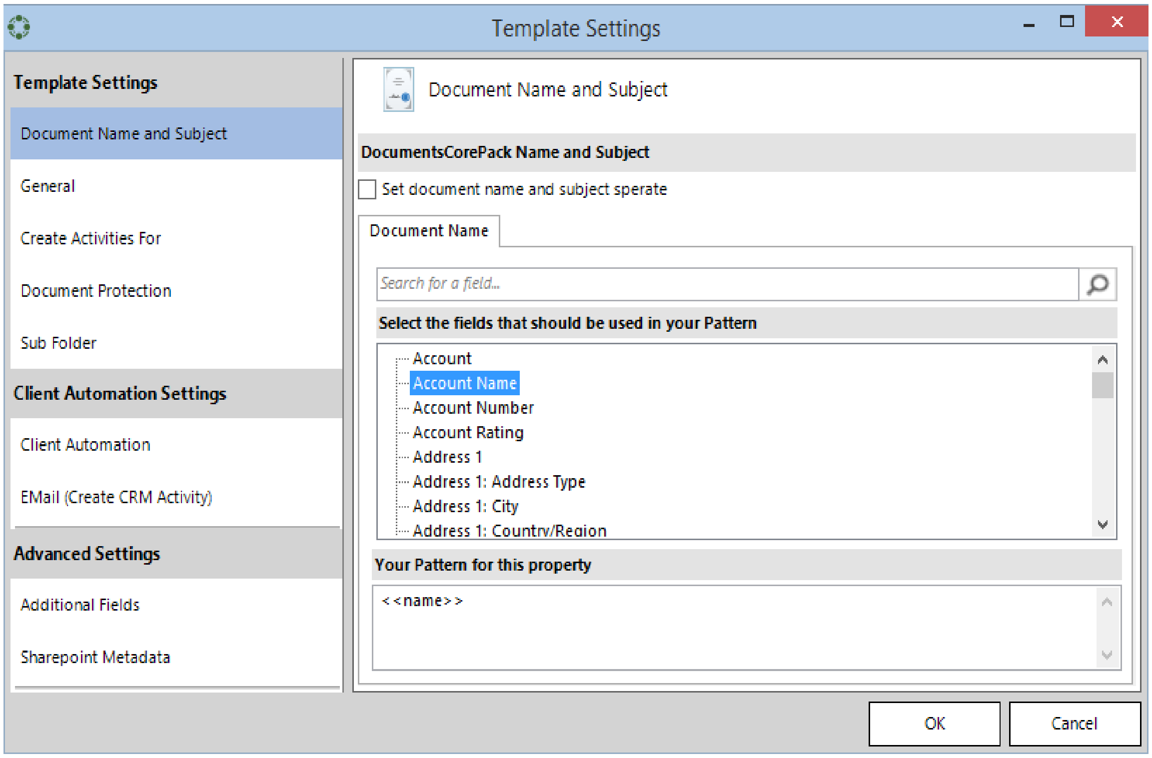


Figure 21: Document Name and Subject

The allowed syntax for this property and the available options for this field are described here (SEE: PAGE 72, 3.1.1 STRINGS (BASIC SYNTAX) F.) This is how such a document could look like:

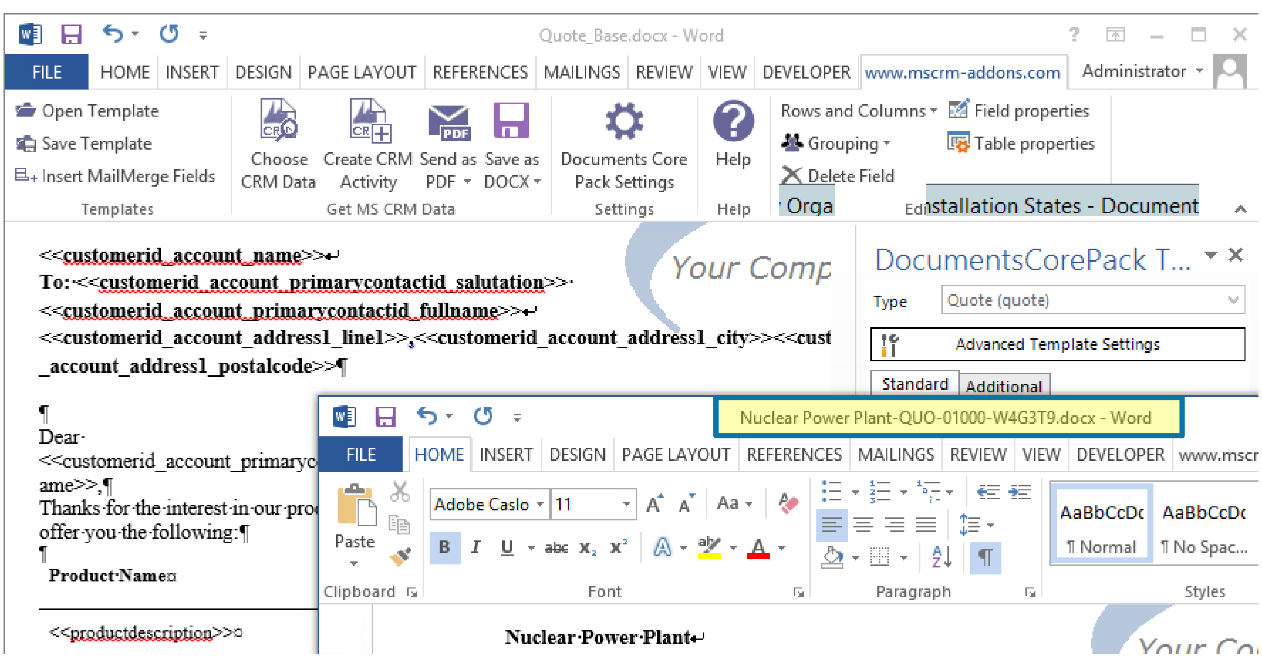


Figure 22: Example of the DocumentName after a merge

1.5.2 General

The “General” property provides you with some general settings options for your future template.

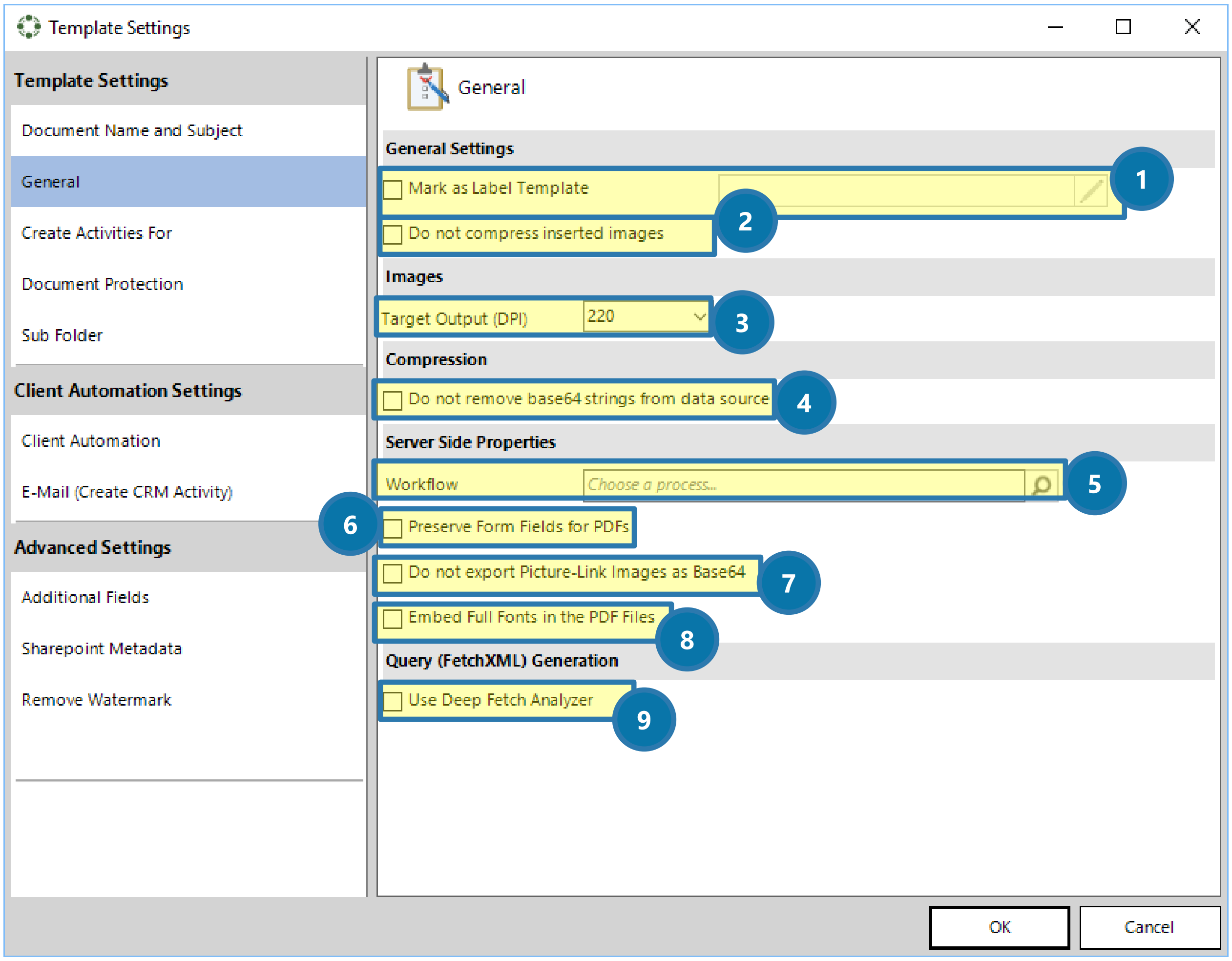


Figure 23: Template Settings - General

❶ Mark as Label Template

Mark your future template as “Label Template” (which has a special behavior).
Furthermore, you have the possibility to sort the label templates in the grey highlighted section on the right side. Simply activate the sort function by clicking into the field. For further information, please have a look at
chapter 5.5.7 [OPTIONAL]: Define the sorting of label templates for specific needs on page 124.

❷ Do not compress inserted images

Change your image settings, for example: do not compress inserted images.

❸ Target Output (DPI)

Change your image settings, for example: set your target DPI output.

❹ Do not remove base 64 strings from data source

Modify the compression of your future template.

❺ Workflow

Set a workflow in order to make sure that the template will be processed in a certain way automatically after its creation.

❻ Preserve Form Fields for PDFs

Check the checkbox to preserve form fields for PDFs. Form fields in PDFs are fields that can be customized (filled) by users.

❼ Do not export Picture-link images as Base64

Prevent the system from exporting picture-link images as base64.

❽ Embed full fonts in the pdf files

Check this box if you would like to embed full fonts into the .pdf files.

❾ Use deep fetch analyzer

Enable this option if you would like to use the deep fetch analyzer.

1.5.3 Create Activities for

The "Create Activities For" property is used to predefine settings for DocumentsCorePack Client based operations that effect templates. The configuration options allow template editors to define the "Recipient", "Regarding" and the "Save Location" of activities based on a template independently.
For further information on DocumentsCorePack Client, please have a look at the documentation of the same name.

Anyway, to set a "Recipient", a "Regarding" or a "Save Location", simply click on the desired entity/location in the TreeView.

Per default, only the "Recipient" – tab is displayed.
If you want all three tabs to be shown, you have to check the "Enable Advanced Settings"- checkbox.

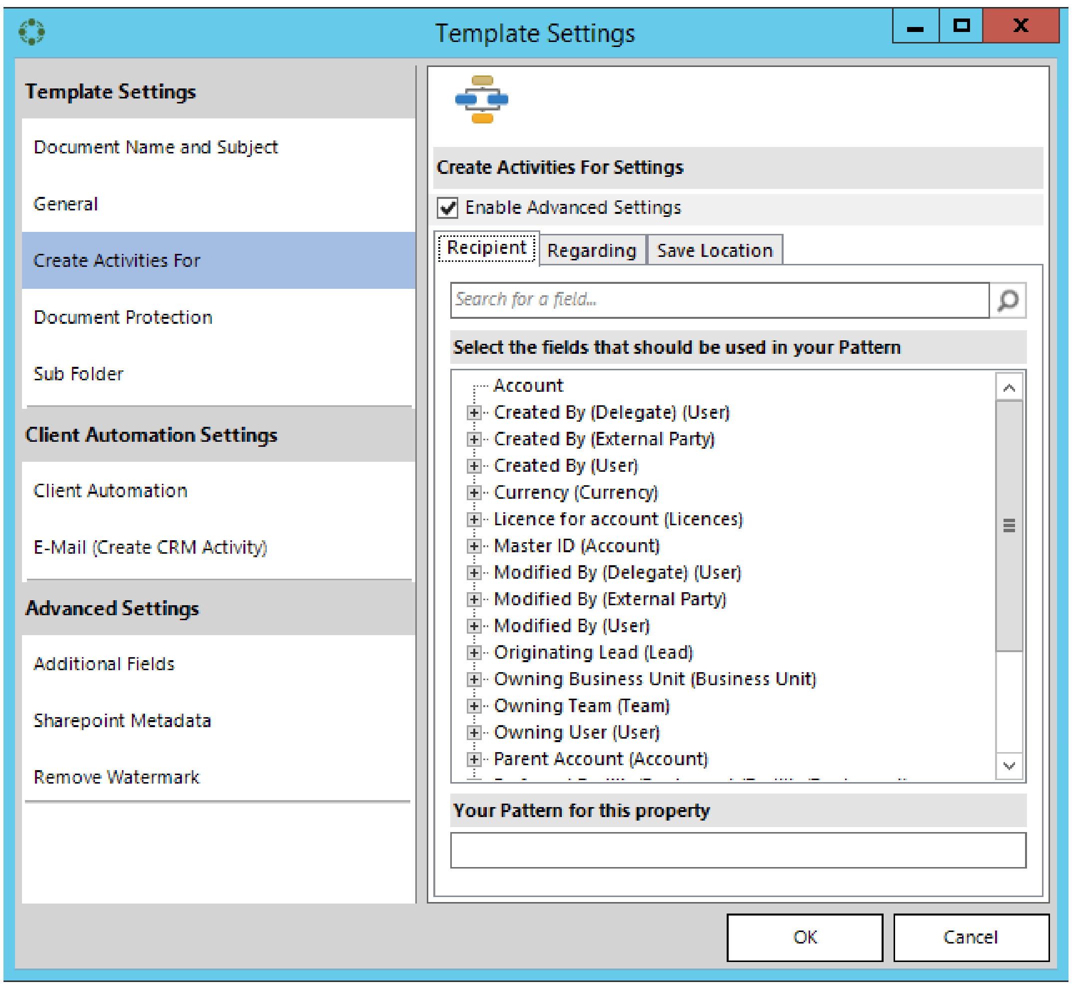


Figure 24: Template Settings – Create Activities For

1.5.4 Document Protection

The “Document Protection” property provides you with the possibility to add a password to your future MS Word document. A practical TreeView supports you with the selection process.

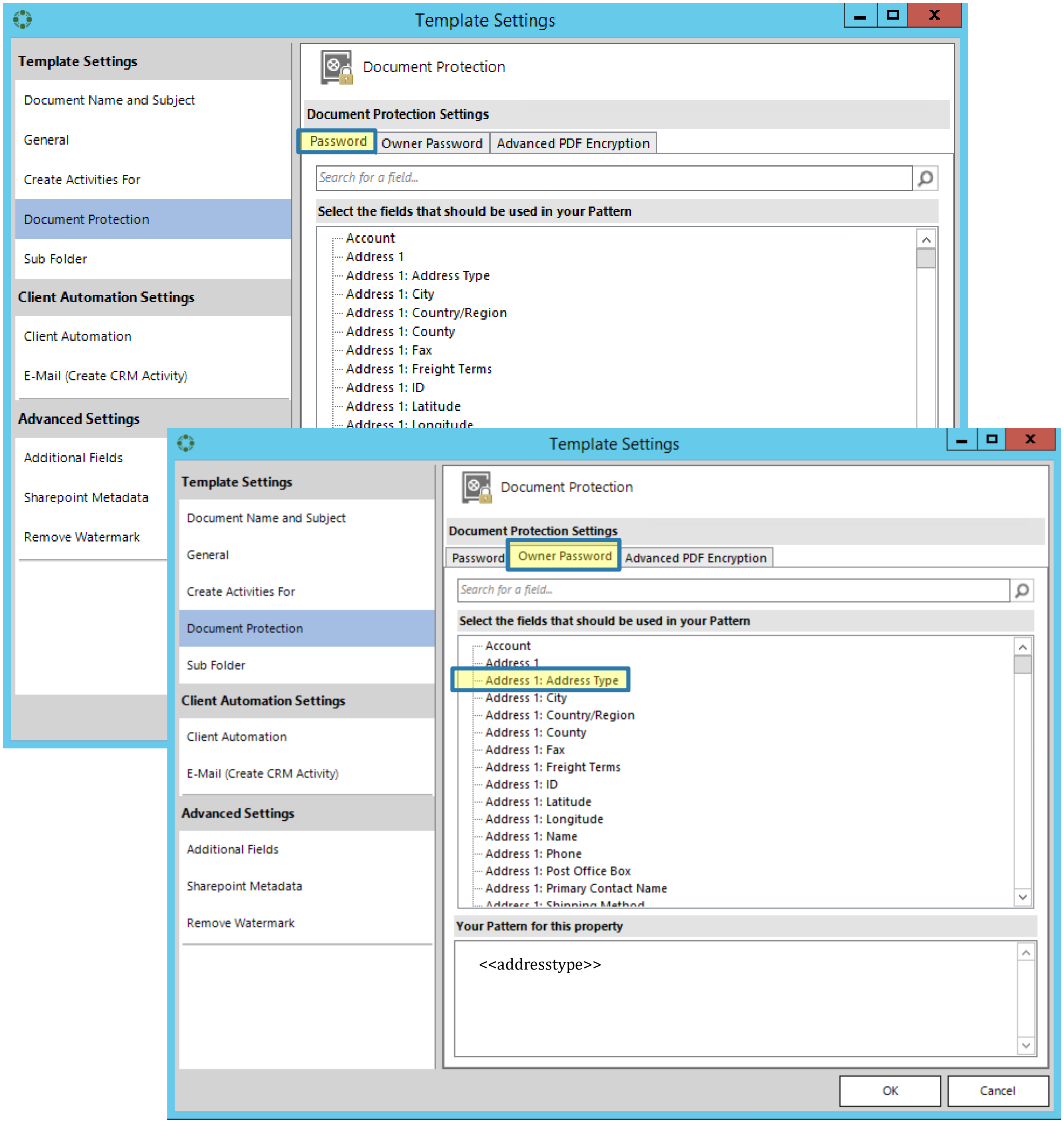


Figure 25: Template Settings – Document Protection: (Owner) Password

For the DocumentsCorePack ServerBased document generation, you can also set a password for PDFs and thus, enhance the security of the document.

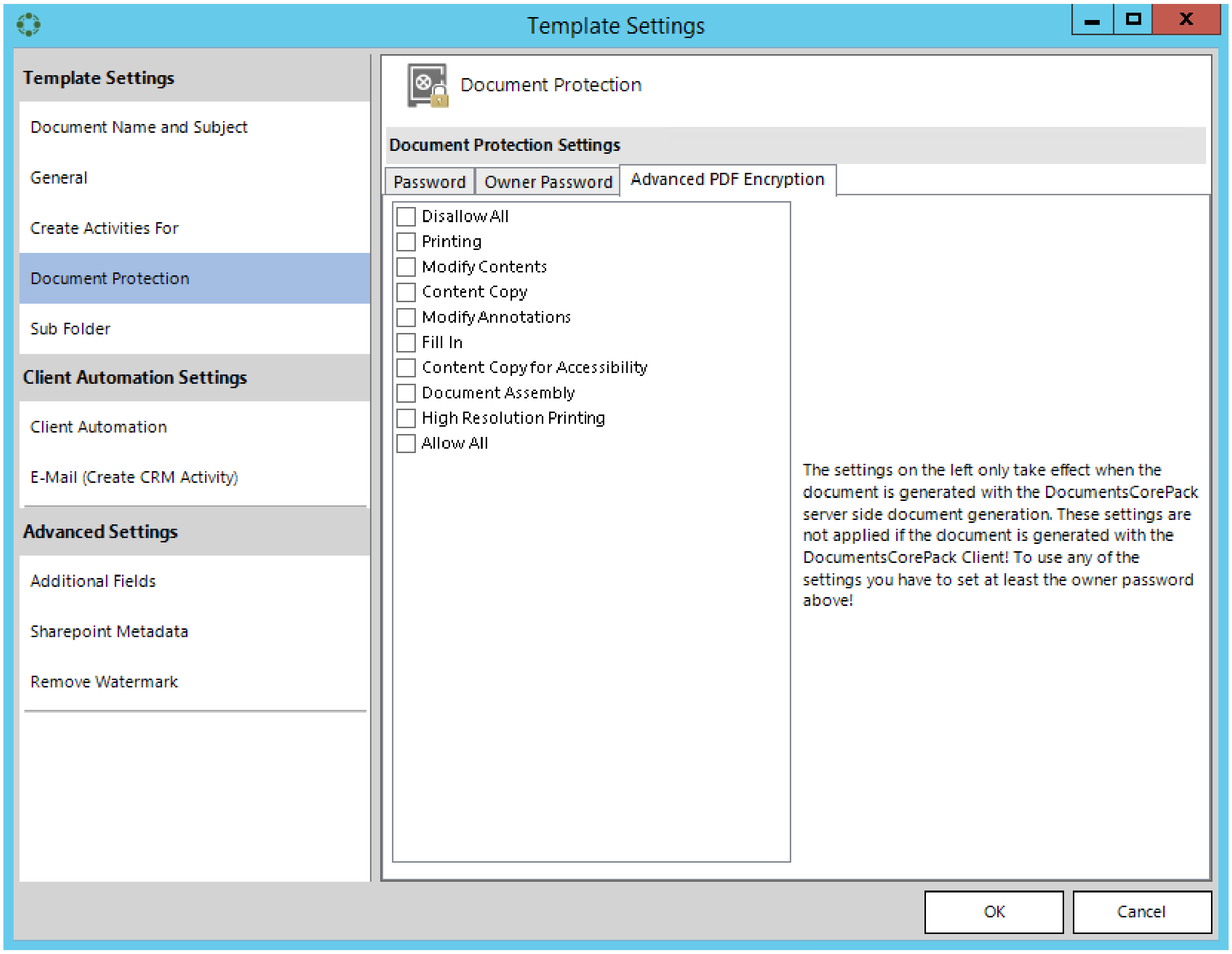


Figure 26: Template Settings – Document Protection: Advanced PDF Encryption

1.5.5 Sub Folder

The sub folder property can be used to define a certain subfolder if the integrated CRM SharePoint storage option is enabled for DocumentsCorePack.

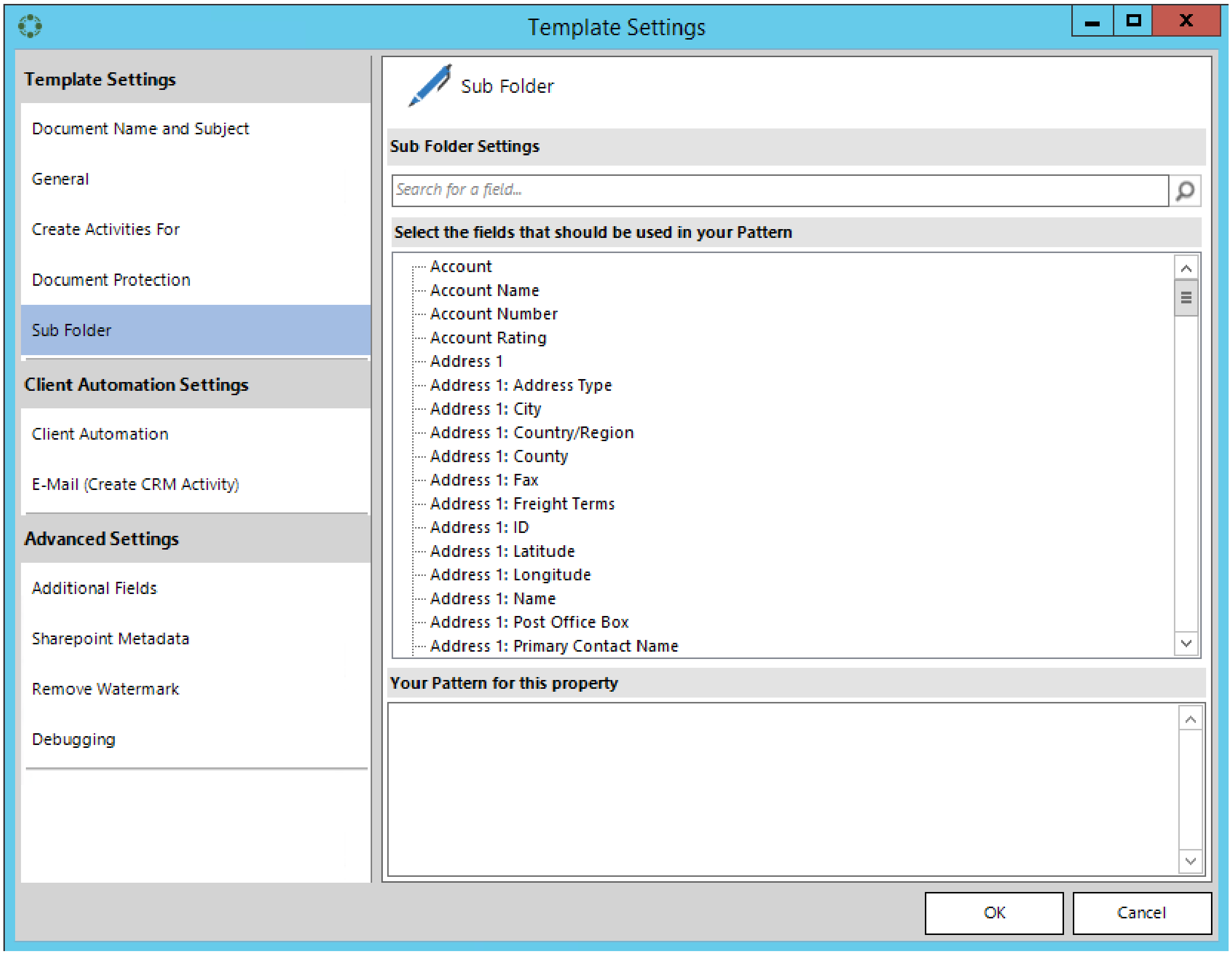


Figure 27: Template Settings – Sub Folder

The Sub Folder also can be created dynamically and based on CRM fields by following the DocumentsCorePack Syntax. (SEE: PAGE 72, 3.1.1 STRINGS (BASIC SYNTAX) F.)

The Subfolder will be created on top of the CRM Integrated SharePoint location. This guide also contains a section for external sources. (SEE: PAGE 203, 7.3 CRM SHAREPOINT INTEGRATION);

1.5.6 Client Automation

The "Client Automation" property settings work only with DocumentsCorePack Client based operations. Furthermore, they only take effect when the ***[Create CRM Activity]*** - button of the Client is used and **do not work** with the ***[Send as ….]*** - option.

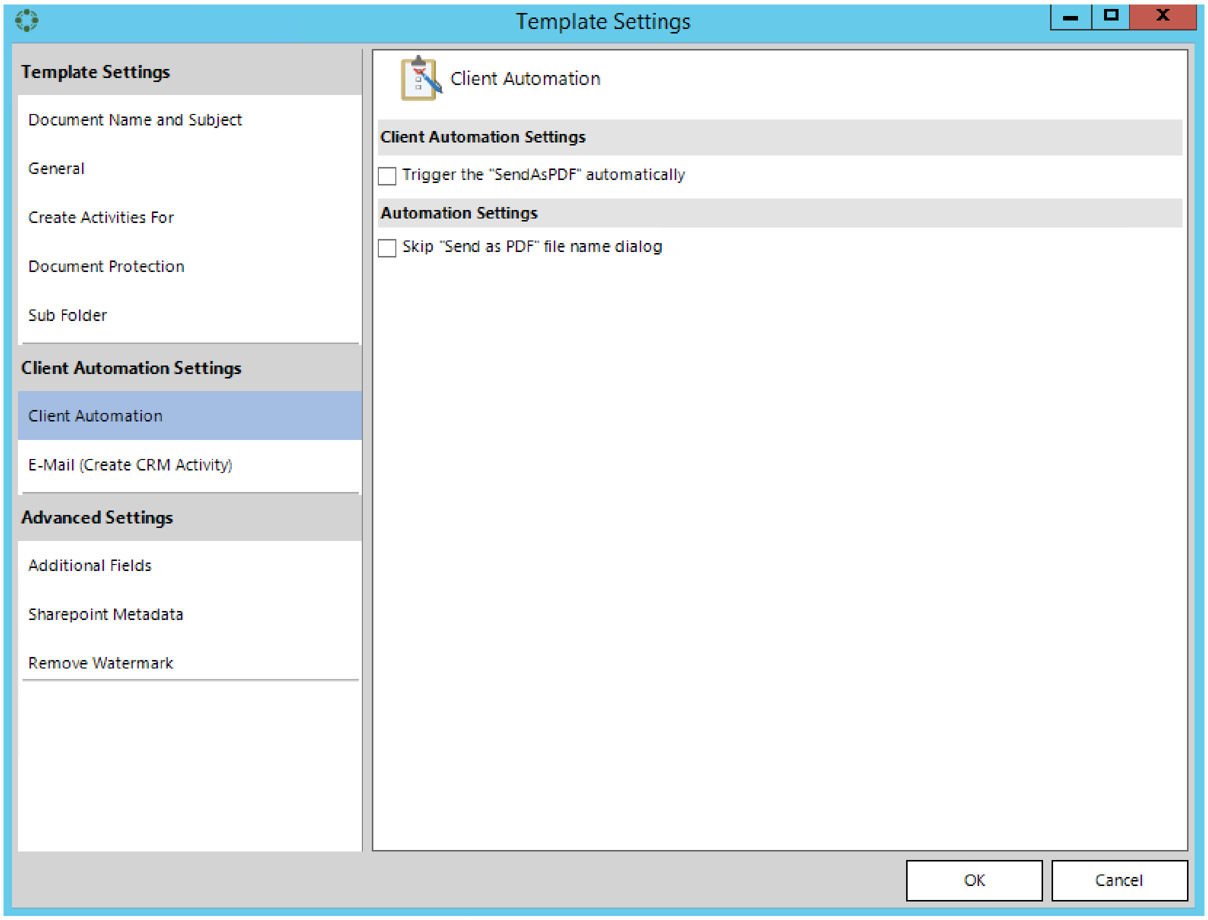


Figure 28: Client Automation Settings – Client Automation

Figure 29: Client Automation Settings – Trigger the [SendasPDF] – button automatically

If this checkbox is checked, PDFs are sent automatically. If you do not want to press the ***[SendasPDF]*** – button manually, this is the perfect feature for you.

Figure 30: Automation Settings – Skip "Send as PDF" file name dialog

Check this check box to automatically skip the "file name"-dialog. Usually, you have to enter a file name if you press the ***[SendasPDF]***-button. This is not necessary anymore if you check this checkbox.

1.5.7 E-Mail (Create CRM Activity)

The "E-Mail (Create CRM Activity)" property enables users to define the "Recipient" (TO), "Carbon Copy" (CC) and "Blind Carbon Copy" (BCC) – addresses of an e-Mail. It is possible to use data from fields out of CRM to be part of the entries. The predefined email addresses will show up in every email activity. "to", "cc" and "bcc" settings of your future Emails are possible in this section.

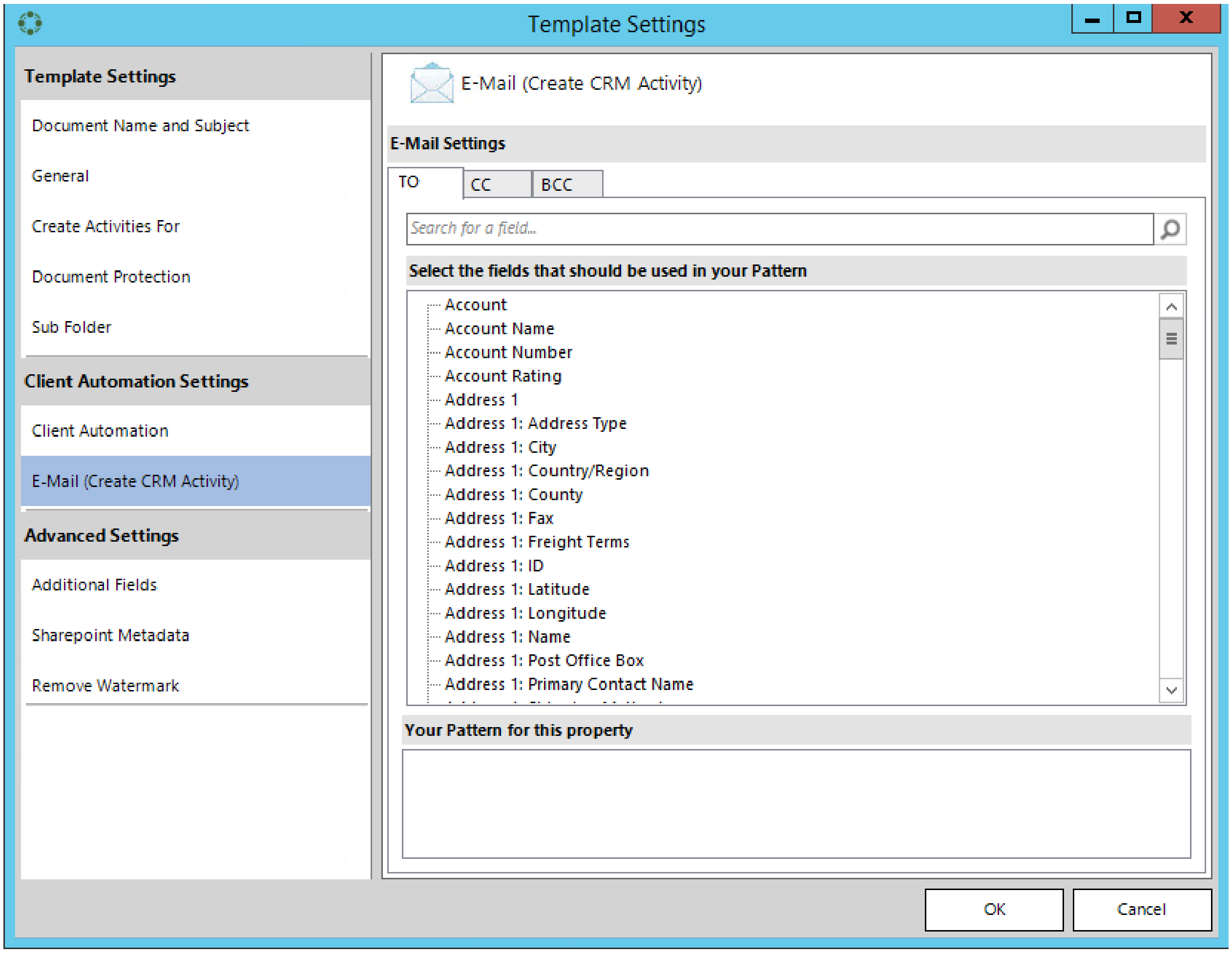


Figure 31: Automation Settings – E-Mail (Create CRM Activity)

1.5.8 Additional fields (obsolete)

This area contains fields that are not directly inserted into the template. You do not have to worry about the settings as all out of the box functionality populates the necessary fields her automatically (This is not further described in a separate article).

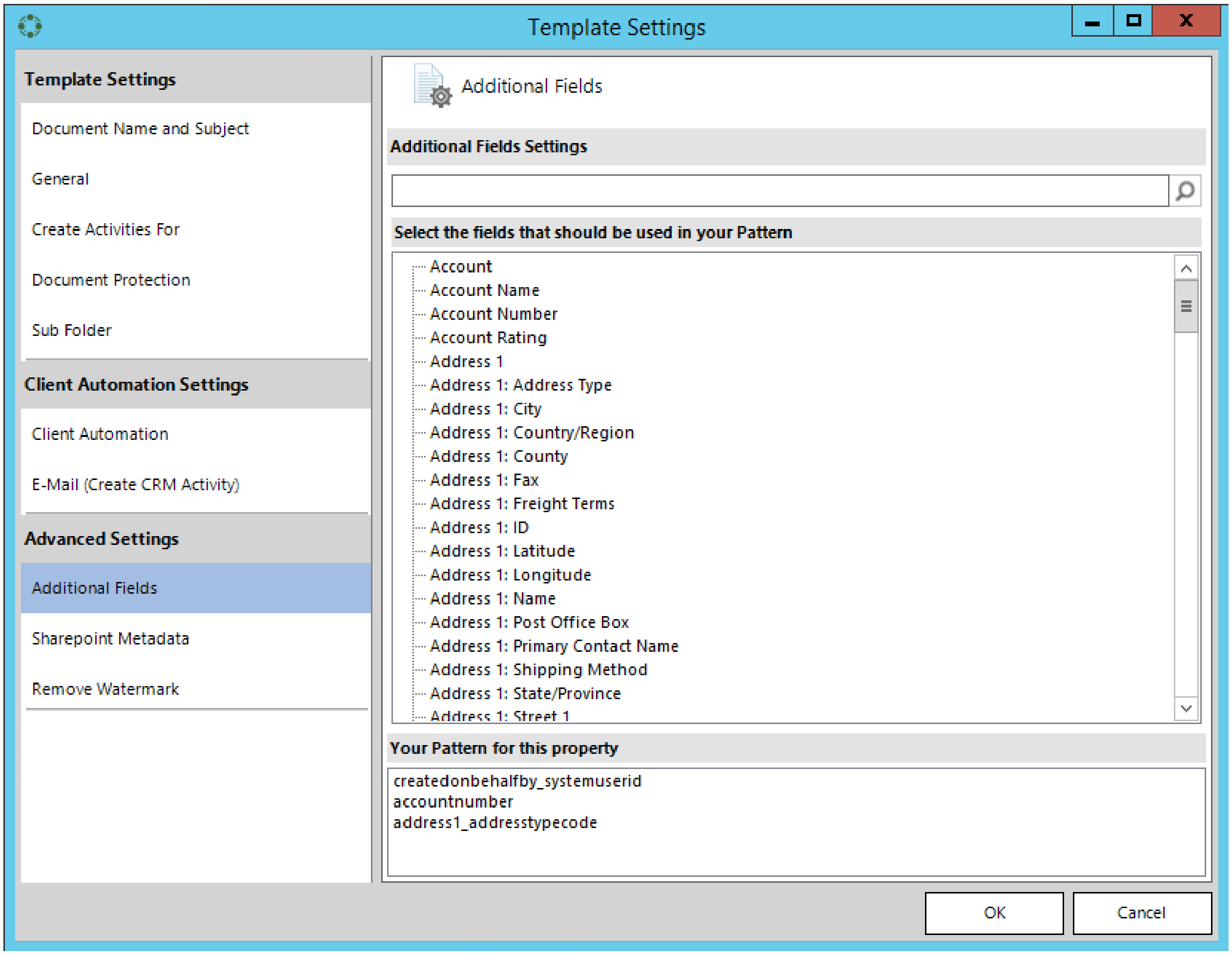


Figure 32: Advanced Settings – Additional fields with example

1.5.9 SharePoint Metadata

Using the standard CRM SharePoint Integration enables you to define metadata fields and values in your template automatically. As soon as the generated document is saved also this metadata is updated in SharePoint. Details about the Standard CRM SharePoint Integration can be found here on PAGE 203, 7.3 CRM SHAREPOINT INTEGRATION.

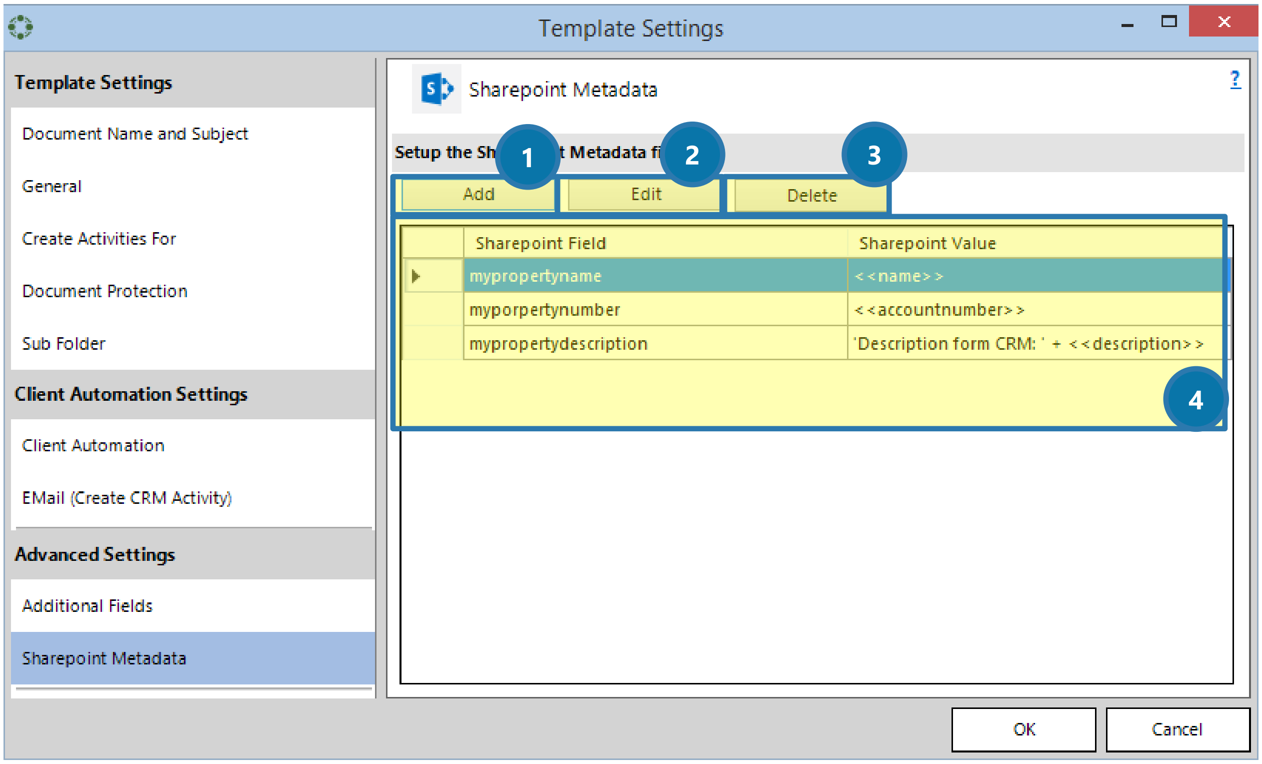


Figure 33: Sharepoint Metadata Dialog

The properties are presented in a list view (4) showing the name of the property and the value set for this property. Within this dialog, you are able to add, edit and delete properties.

SharePoint taxonomy properties are not supported.

1.5.9.1 ① Add

When you add a new property, a dialog appears. In this dialog, you have to set the actual name of the SharePoint metadata property. To find this name, simply search for the term in the Search-field and click on the ***[magnifier]***-button. The TreeView will provide you with all fields that a) contain your search term and b) are related to the main entity (in this example: “Account”).

The name can be set up following the syntax of DocumentsCorePack for strings (SEE: PAGE 72, 3.1.1 STRINGS (BASIC SYNTAX) F.).

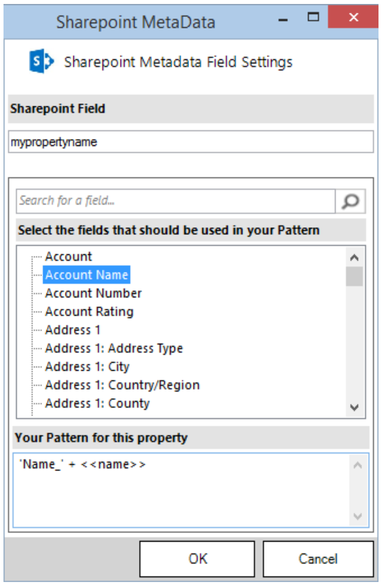


Figure 34: SharePoint Metadata Property

1.5.9.2 ② Edit

By using the edit button on any existing property, the same name can be set up following the syntax of DocumentsCorePack for strings (SEE: PAGE 72, 3.1.1 STRINGS (BASIC SYNTAX) F.).

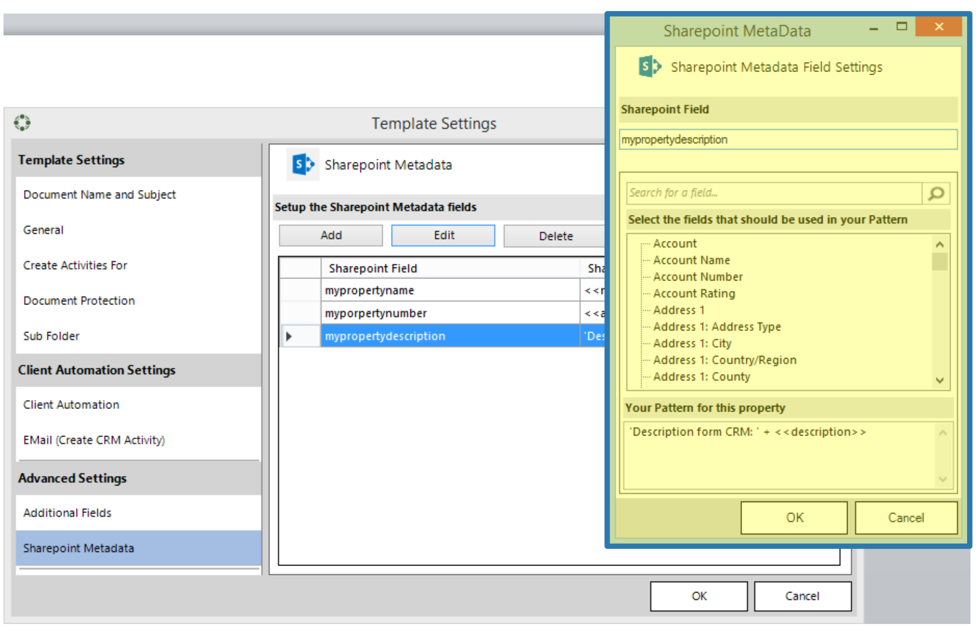


Figure 35: SharePoint Metadata Property - Edit

1.5.9.3 ③ Delete

Delete removes an existing property form the list.

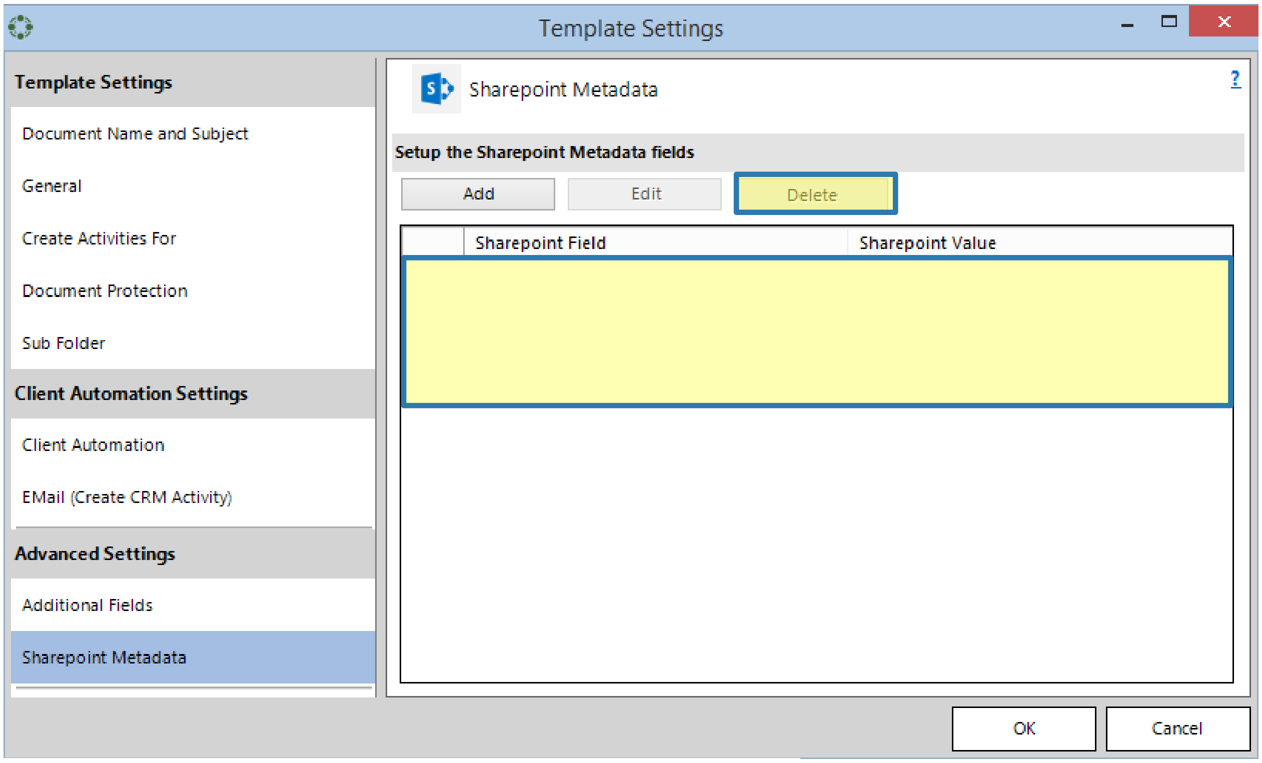


Figure 36: SharePoint Metadata Property - Delete

Using the standard CRM SharePoint Integration enables you to define metadata fields and values in your template automatically. As soon as the generated document is saved, also this metadata is updated in Microsoft Dynamics CRM/Dynamics 365.

1.5.9.4 ④ Create a new property

To create a new property, simply click on ***[Add].*** The SharePoint MetaData window pops up. You have to type in the name of the SharePoint property manually into the *SharePoint Field* ①. Select the fields that should be used in your pattern here (2). The value for the property can be composed of Microsoft Dynamics CRM/Dynamics 365 fields and fixed text.

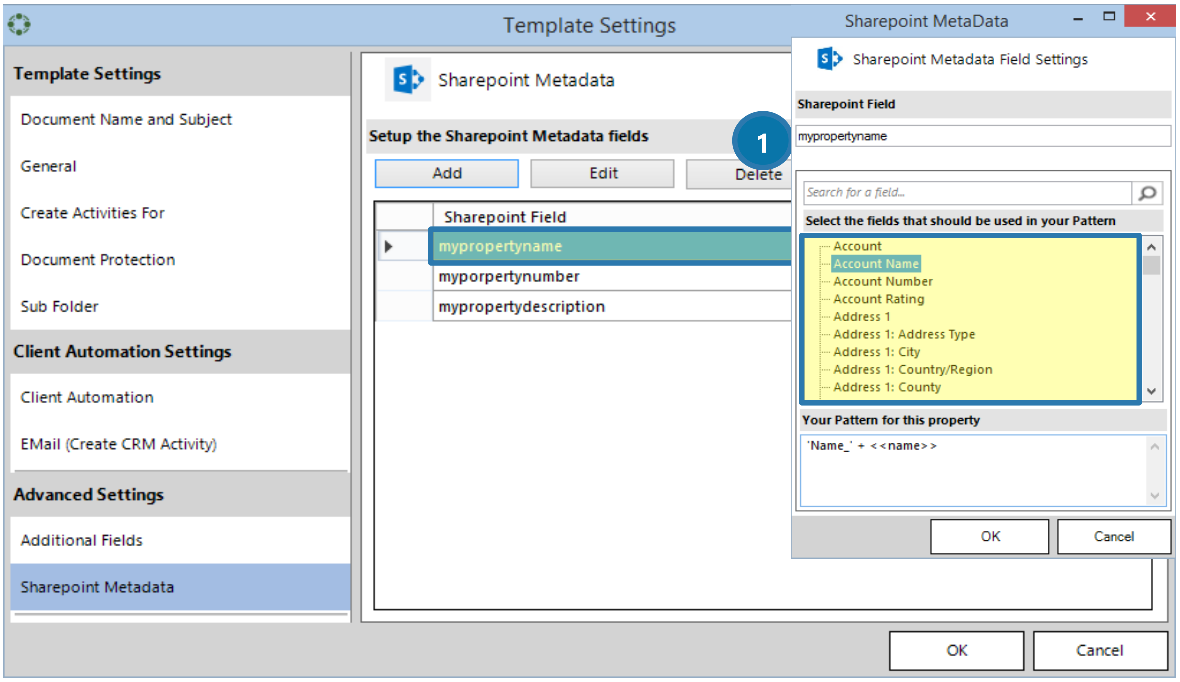


Figure 37: SharePoint Metadata Property – Create new property

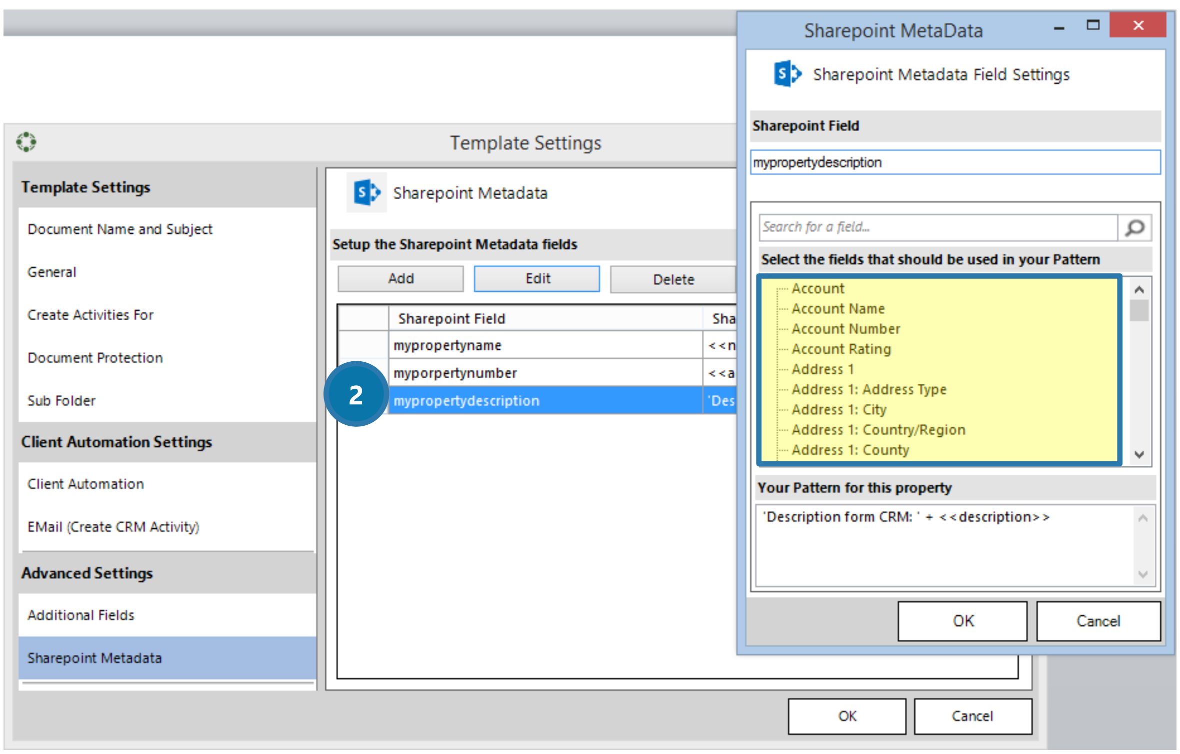


Figure 38: SharePoint Metadata Property – Select fields for newly created property

1.5.10 Remove Watermark

Define a condition that removes the Inserted Watermark if the Condition is met. You have to insert a Watermark in your template first, otherwise, this property does not have any effect. How to insert a watermark is described on PAGE 201, 7.1 HOW TO INSERT A WATERMARK.

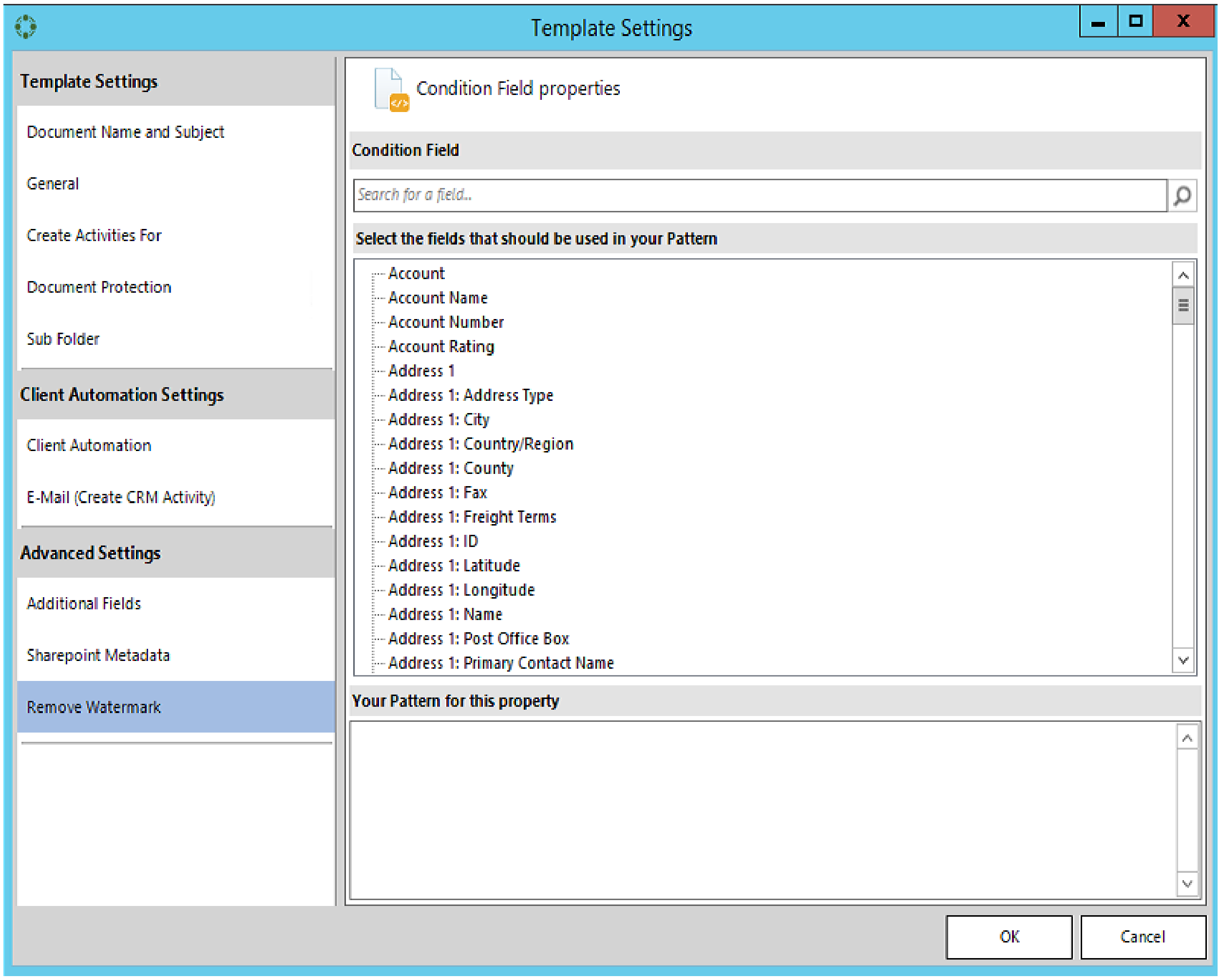


Figure 39: Remove Watermark

The condition that can be defined follows the DocumentsCorePack syntax for conditions (SEE PAGE 76, 3.1.4 CONDITION DESIGNER).

1.5.11 Prompts

Prompts enable the user to add or modify document elements without opening the document. The additional options for prompts are displayed in an additional window of the DocumentsCorePack dialog.

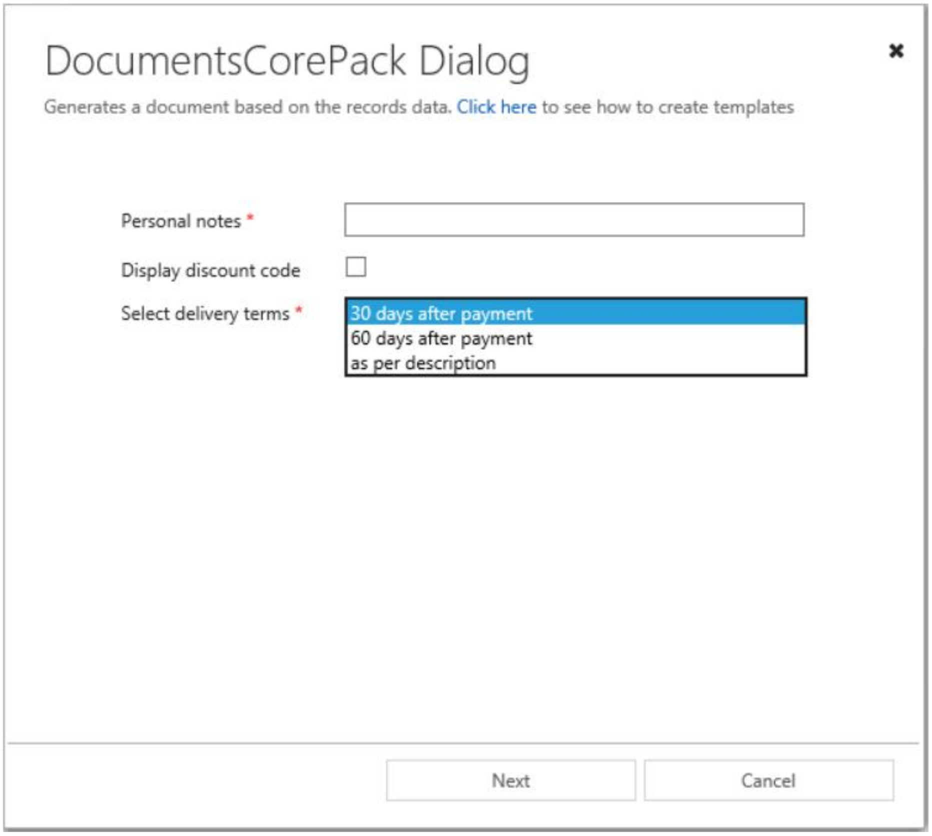
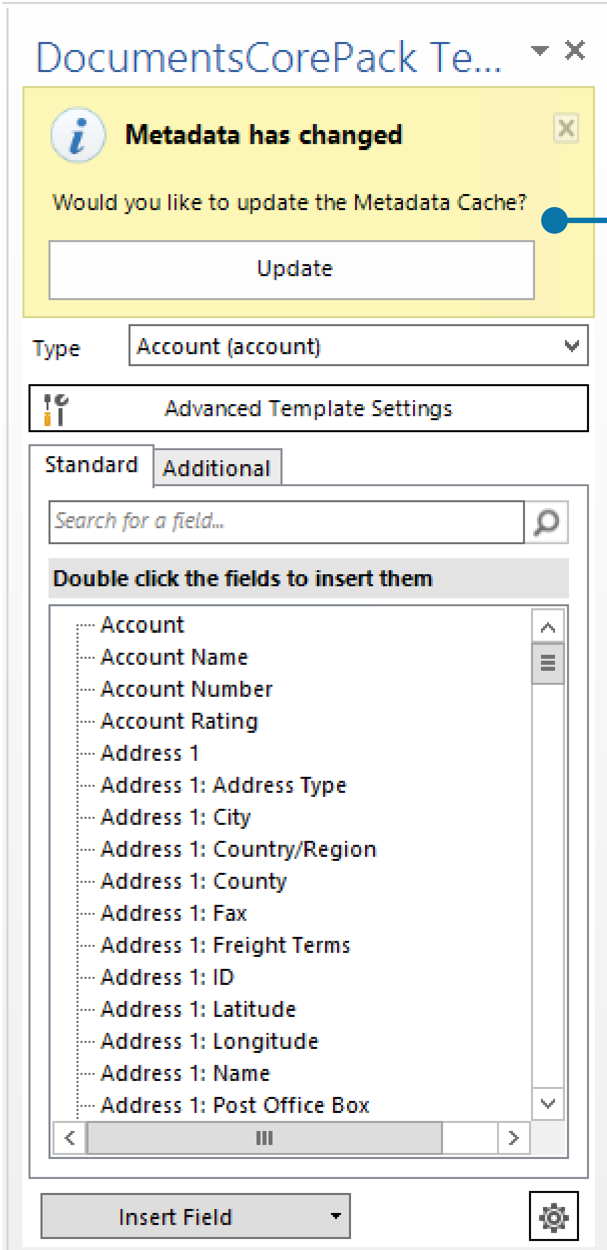


Figure 40: Prompts

A prompt is defined in a template within the advanced template settings. How to insert prompts is described on PAGE 201, 7.1 HOW TO INSERT A WATERMARK.

1.6 Notification Area

The notification area provides you with import information about DocumentsCorePack. You will see this message most likely if the metadata of CRM is out of date.



Notification Area:
In order to keep (especially your Metadata) up to date, simply click on the ***[Update]***-button, when the message appears.

Figure 41: Notification Area – Metadata update

1.7 Additional-tab

This window has been designed to manage and insert additional fields.

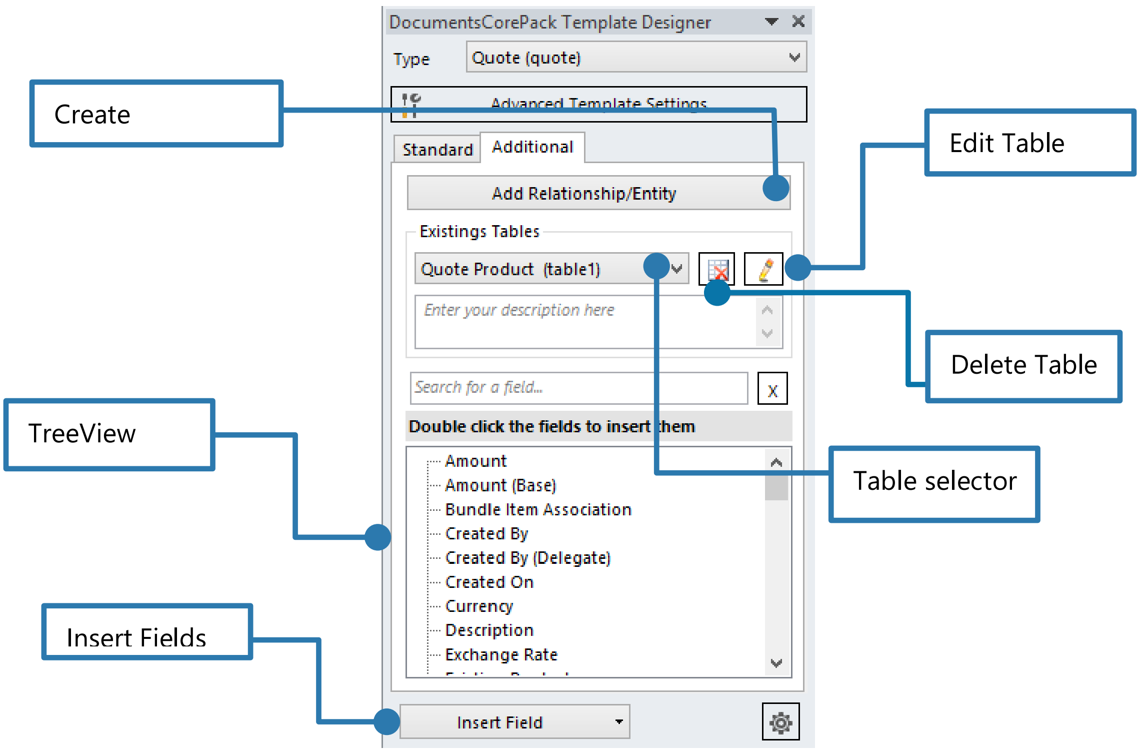


Figure 42: DocumentsCorePack Template Designer UI - Additional tab

1.7.1 Add Relationships/Entity

A click on the button ***[Add Relationship/Entity]*** (1) will open the relationship designer to create a new relationship from scratch. While a click on the ***[Dropdown Arrow]*** (2) expands an extended menu with predefined relationships.

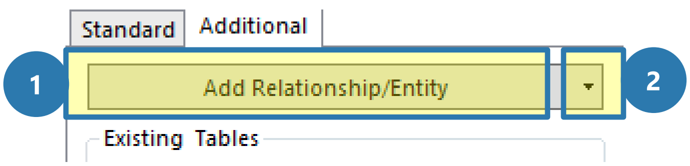


Figure 43: Add Relationship/Entity button

Clicking on the Dropdown Menu of the ***[Add Relationship/Entity]***-tab opens this dialog:

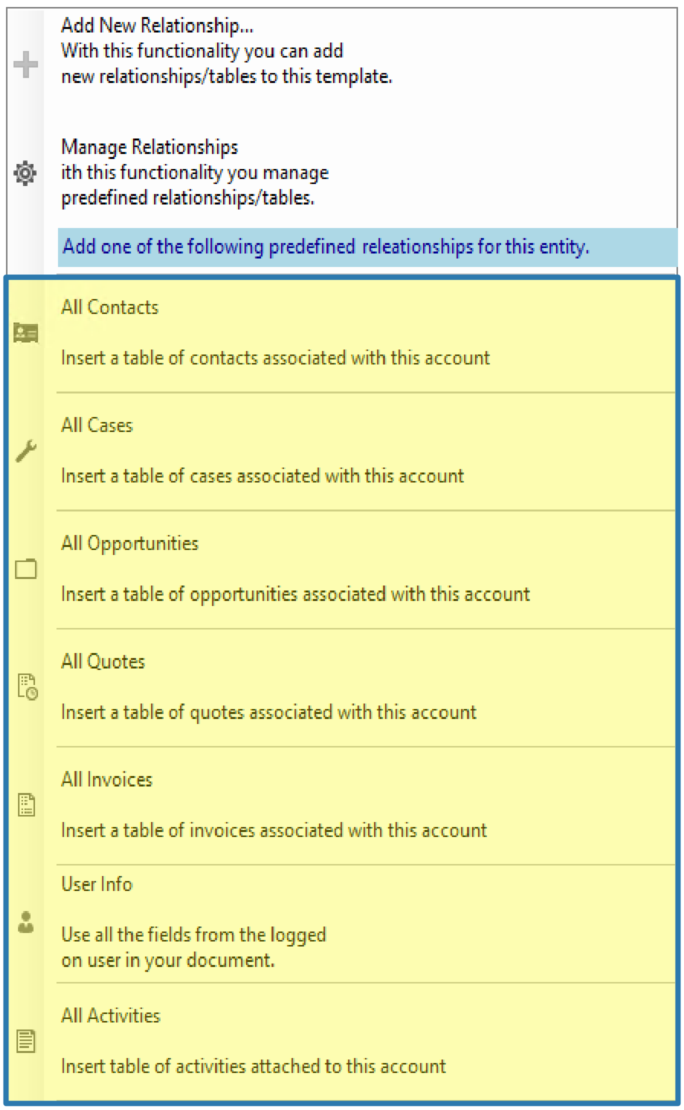


Figure 44: Add Relationship/Entity dropdown - predefined relationships

The marked area includes all predefined relationships. DocumentsCorePack already has a variety of different predefined relationships for standard CRM entities.
e.g. All Contacts of an Account, Quote Products of a Quote, …

In our example, we decided to select ***[All contacts]*** to get access to the fields from the entity “Contact by clicking on it.”
Now the Additional tab TreeView is filled with the predefined relationship [All Contact] and you can easily insert them into your template.

1.7.2 Table selector

The table selector is a drop-down menu that contains all added relationships for the current template. By switching the selection, the corresponding fields in the below TreeView change.

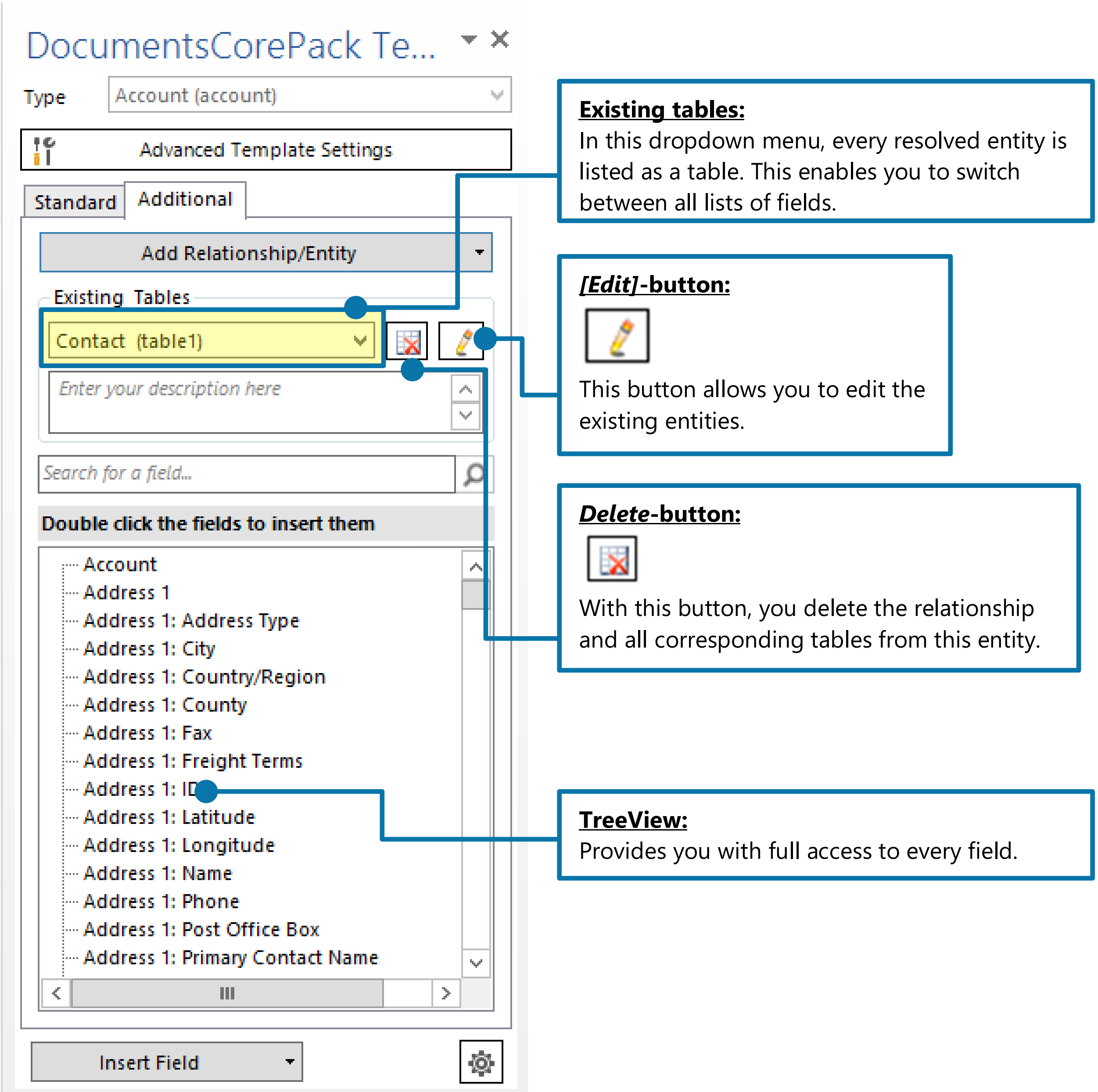


Figure 45: Table Selector

1.8 Additional Relationships

The ***[Add Relationship/Entity]***-button also includes buttons that allow its users to add a new relationship or to manage existing relationships and tables. For further information on how to manage tables, please have a look at CHAPTER 2.1 MANAGE TABLES, PAGE 68.

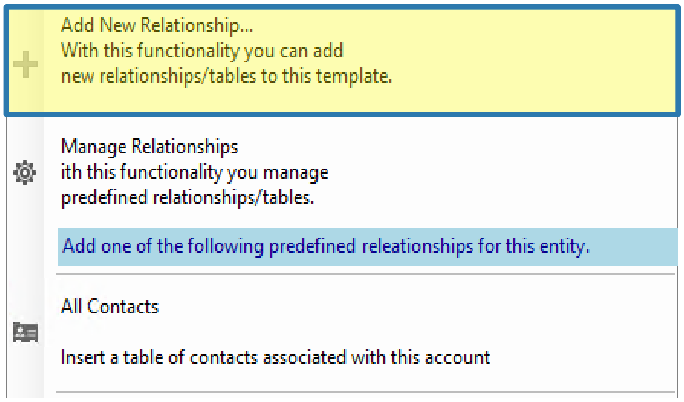


Figure 46: Add New Relationship...

Clicking the ***[Add New Relationship...]***-button opens the dialog shown below. Within it, you can configure fields, tables, and relationships that are important for your document.

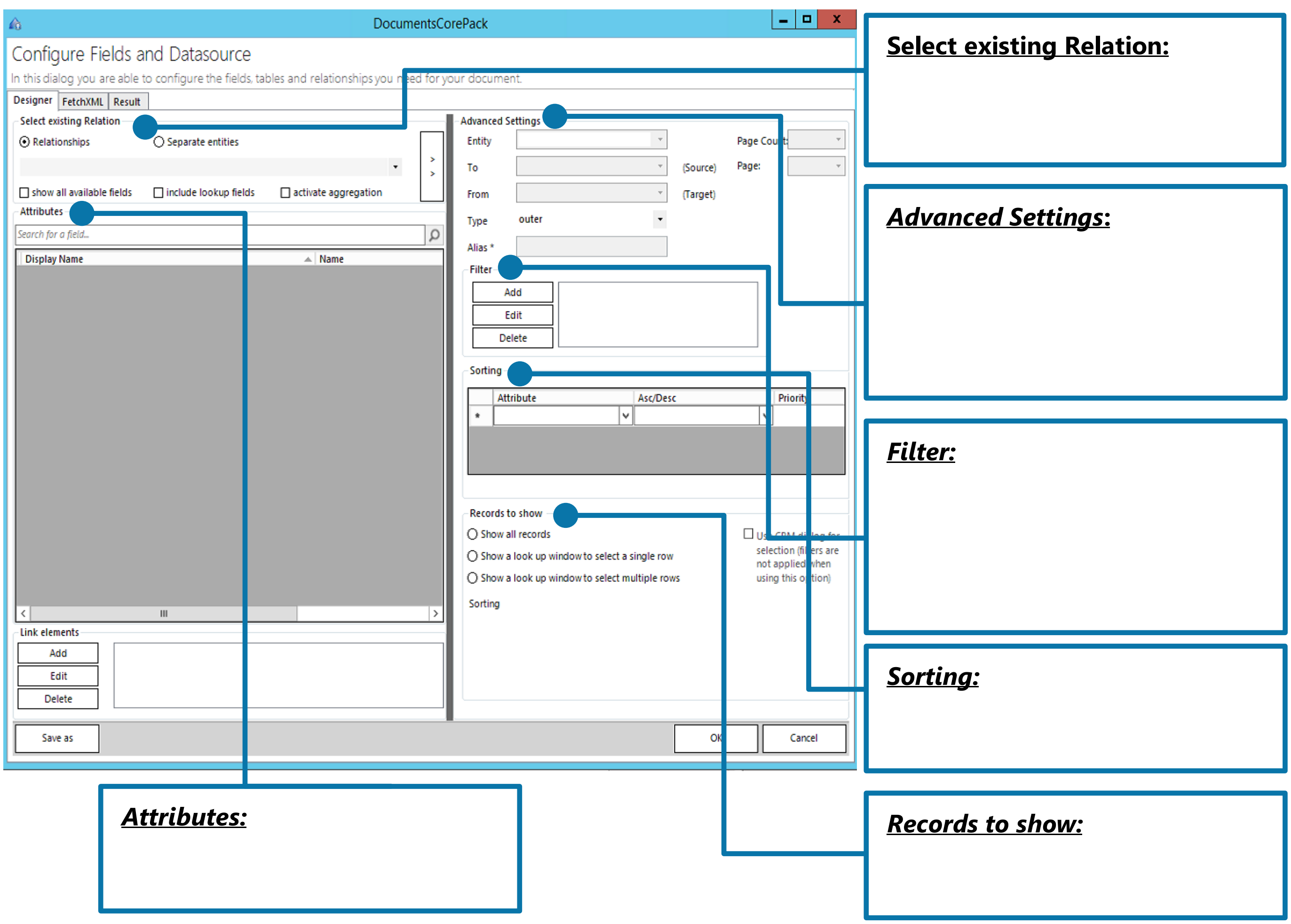


Figure 47: Add New Relationship... - Configure Fields and data source dialog

1.8.1 Aggregation

Checking the activate aggregation checkbox, allows its users to group relationships in certain ways.

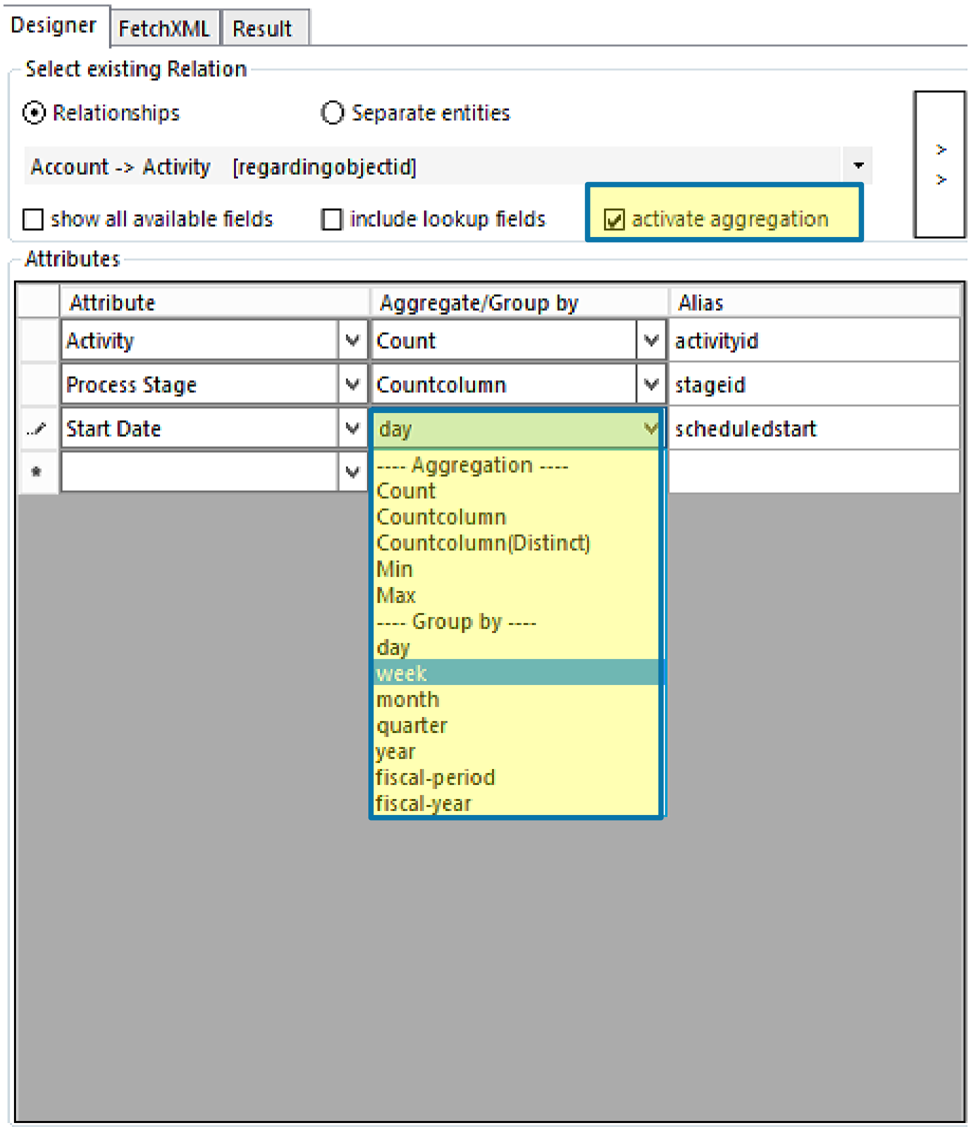


Figure 48: Aggregation checkbox activated including examples

The aggregation function allows you to aggregate attributes via the least/most important and to group attributes within specified limits. The functionality is very useful when you want to create an overview of certain data and sum or calculate the average of revenues or sales.

It can also be used to create quarterly, yearly, monthly or daily reports. Aggregation fetches enable you to calculate sum(s), average minimum & maximum and count items. All aggregation methods supported by Microsoft Dynamics 365 (CRM) can be easily applied to any template, although the selection depends on the fields to be inserted.

The following aggregate functions are supported by Microsoft Dynamics 365 (CRM):

AVG

This function computes the average values for all entities or relationships used for the template.

0 is not considered when the average is calculated.
However, the result of a calculation including 0 is replaced by zero (0).

COUNT (sub-functionalities: COUNTCOLUMN, COUNT DISTINCT COLUMNS)

This functionality provides you with a count of all entities or relationship used for the template.

MAX

This functionality provides you with the maximum value of a certain selection of entities.

0 is not considered when the maximum value is calculated.
However, the result of a calculation including 0 is replaced by zero (0).

MIN

This functionality provides you with the minimum value of a certain selection of entities.

0 is not considered when the minimum value is calculated.
However, the result of a calculation including 0 is replaced by zero (0).

SUM

This functionality provides you with a sum of all entities or relationships used for the template.

MULTIPLE AGGREGATES

This functionality enables you to use multiple aggregate attributes to set a minimum and a maximum.

GROUP BY

This functionality enables you to use multiple aggregate attributes and a linked group by attribute.

GROUP BY WITH LINKED ENTITY

This sub-functionality enables you to use the sum aggregate attribute to sum linked entity values.

GROUP BY YEAR, QUARTER, MONTH, WEEK OR DAY

These sub-functionalities enable you to group results by year, quarter, month, week or day.

MULTIPLE GROUP BY

This functionality enables you to use multiple groups by clauses.

ORDER BY

This functionality enables you to use multiple order by clauses.

Please find an example of how to use an aggregation properly in chapter 5.8 HOW TO CREATE AN AGGREGATION FETCH ON PAGE 132.

1.9 Insert Field Button

This feature allows inserting additional contents in your .docx. The ***[Insert]***-button provides you with various insert options. It is a simple and centralized way to insert every MSCRM-field as a "special"-field. To get an overview of your options, you need to follow three easy steps:

1) Clicking on ***[Insert MailMerge Fields]*** in the www.mscrm-addons.com-tab will open the DCP Template Designer
2) Select a field in the TreeView of the DocumentsCorePack Template Designer
3) Click on the drop-down menu of the ***[Insert field]***-button on the right side at the bottom of the DocumentsCorePack Template Designer:

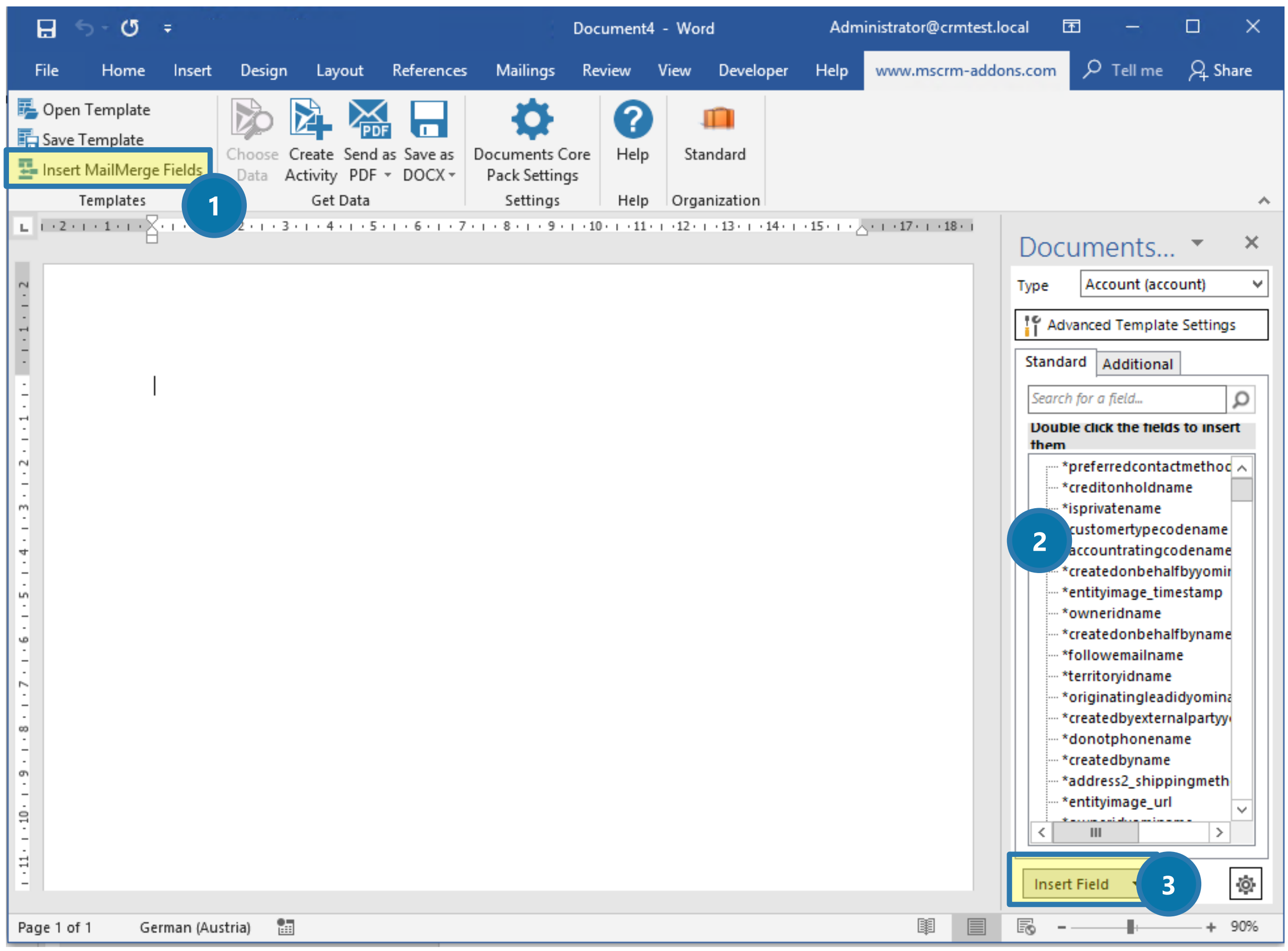


Figure 49: The Insert Field button

Opening the drop-down menu provides you with a lot of options that are going to be described in detail in the next chapters:

[Insert as Picture Field]
[Insert as a Picture-Link Field]
[Insert as a Picture-Link Field]
[Insert as Document]
[Insert as HTML]
[Insert Static Item]
[Insert [Computed Item]]
[Insert DocuSign Item]
[Insert AssureSign Item]

The functionalities of DocuSign, as well as of AssureSign, are explained in the e-Signature User Guide, which can be found here.

1.9.1 Insert as Picture Field

This option will insert a placeholder for an image.
The image source for the image can be a path to a document.
The Image will be embedded into the document.

This option is not recommended when the generated document will be further used as a source for an email as most email clients are not able to display base64 embedded image. Or as they do not allow this type of embedded image can also be used for malicious attacks.

Please find a more detailed tutorial in our How-to-section “How to Insert as Picture Field”, page 139.

1.9.2 Insert as a Picture-Link Field

This option will insert a placeholder for an image.
The image path should be accessible from all over the network or the web.

This option is recommended if you would like to insert dynamic pictures in your document based on data in CRM.

Please find a more detailed tutorial in our How-to-section, "HOW TO INSERT A PICTURE LINK FIELD", PAGE 143.

1.9.3 Insert as Document

This option will insert a document that has been previously attached as a note in MS Dynamics CRM/Dynamics 365.

Attaching a document as note basically works like attaching a picture as note (but of course, you have to replace the picture by a document).

Please find a more detailed tutorial in our How-to-section “How to insert as document”, page 145.

1.9.4 Insert as HTML

HTML is an abbreviation for Hyper Text Markup Language. You will usually come across this term when talking about websites. HTML defines the layout when viewing in a browser. As Word is also capable of creating HTML pages you also can work the other way around and insert HTML into a document.

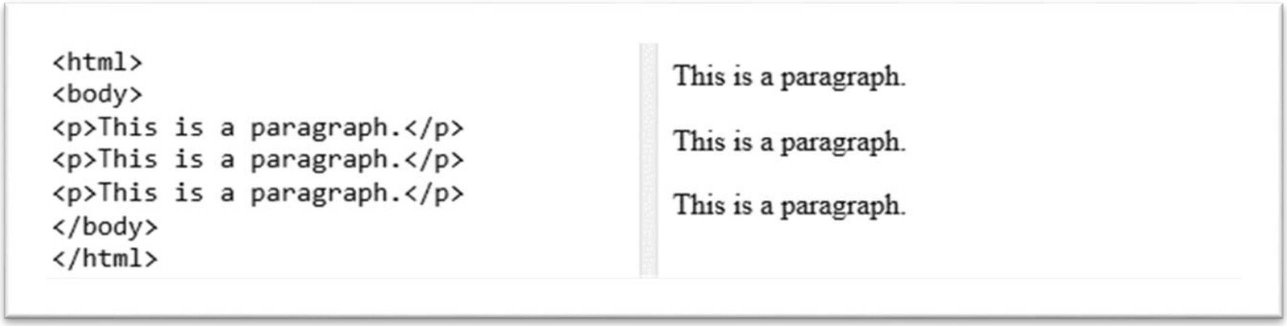


Figure 50: HTML code (left), compiled HTML (right)

Insert as HTML enables you to insert various HTML contents into templates. The functionality is able to interpret HTML-codes stored in CRM and to display the contents appropriately in merged documents.

An HTML editor or some self-created input written in HTML is required to use the ***[Insert as HTML]*** option. We do not automatically provide you with an HTML editor. If needed, it has to be implemented by you into your CRM system. There are various free and also some charged HTML editors that you could use.

Please find a more detailed tutorial in our How-to-section "HOW TO INSERT AS HTML", PAGE 148.

1.9.5 Insert Static Item

This option has two main purposes.
It will insert static documents.
It also includes the possibility to format and structure the document.

Please find a more information in our How-to-section “How to insert as static item”, page 149.

1.9.6 Static document

This option allows you to insert a sub template into your current template.
It was as well designed to insert further text documents like, for example, General Terms and Conditions.

Please find a more detailed tutorial in our How-to-section “How to insert as static document, page 149.

1.9.7 Page Break

This option enables you to insert a dynamical page break into your document.

The Insert Page Break – the option also works with the table. If you, for example, have a table with product information and you insert a “Page Break” – item, you will automatically get an extra page for each product as a result.

Please find a more detailed tutorial in our How-to-section “How to insert Page Break”, page 153.

1.9.8 Remove Empty Lines

“Remove Empty Lines” – fields are a simple way to dynamically structure your document after a merge process. For example, if you want to delete unnecessary lines between contacts and opportunities, simply insert such a “Remove Empty Lines”-field. This option enables you to insert dynamical “Remove Empty Lines” into your document.

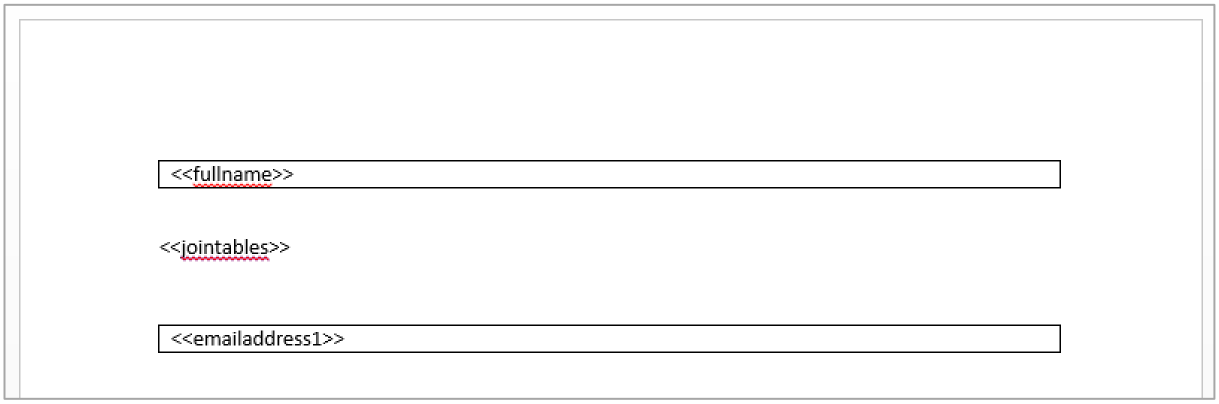
The “Remove Empty Lines” – fields are very useful when subdocuments or HTML-content is inserted.

Please find a more detailed tutorial in our How-to-section “How to insert Remove Empty Lines”, page 154.

1.9.9 Join Tables

This option combines tables, making a single table out of it.

In this example, we have 2 tables from an additional entity but want those two Fields grouped together in one table. So, we have inserted a <<jointables>> between the tables, and if this template will be merged the tables get joined together.



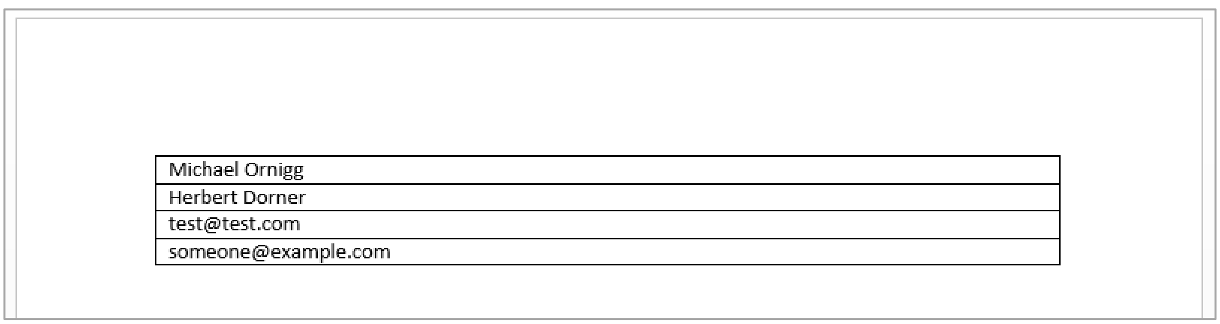
<<fullname>>

<<jointables>>

<<emailaddress1>>

Figure 51: Two tables with the <<jointables>> command before a merge

As you can see in the following screenshot in this Template is just one single table will all merged field from above.



Michael Ornigg
Herbert Dorner
test@test.com
someone@example.com

Figure 52: Two tables with after the <<jointables>> command was executed

Please find a more detailed tutorial in our How-to-section "HOW TO INSERT JOIN TABLES", PAGE 155.

1.9.10 Insert [Computed Item]

This option empowers users to make basic arithmetic operations with Dynamics 365 number-fields. Please find a more detailed tutorial in our How-to-section "HOW TO INSERT COMPUTED ITEMS", PAGE 156.

1.9.11 Insert [QR Code]

"Insert QR Code" – fields help you to define a pattern for a dynamically created QR-Code. The example below shows a QR-Code (2) that is based on a CRM field in a template 1.

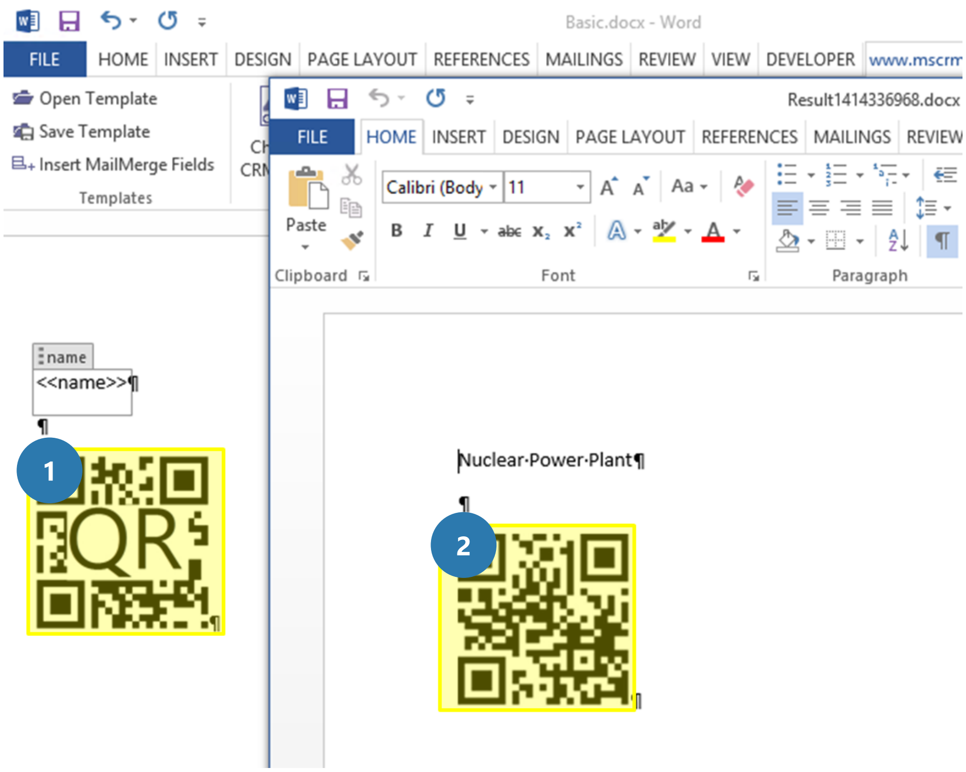


Figure 53: Example of inserted QR Code and CRM field in a template

Please find a more detailed tutorial in our How-to-section "HOW TO INSERT QR CODES", PAGE 157.

1.9.12 Insert [Advanced String]

The "Advanced String" field allows you to define a pattern for a dynamically created string. The example below shows an advanced string 2 based on placeholder in a template 1.

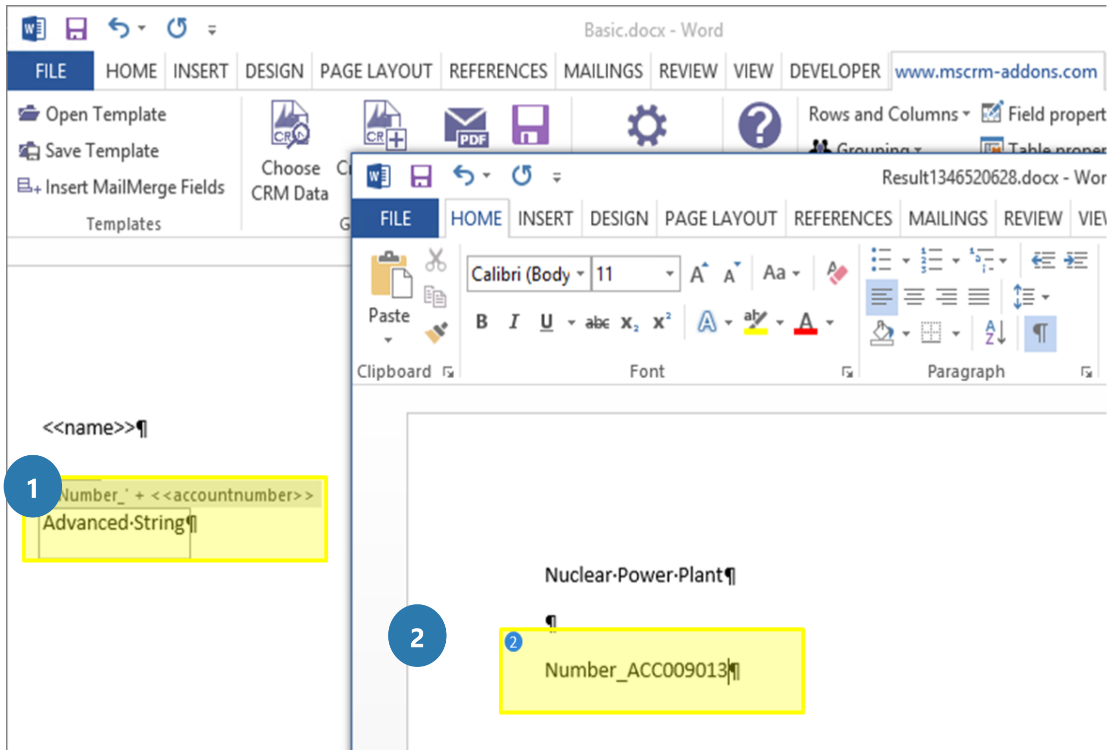


Figure 54: Example of dynamic string

Please find a more detailed tutorial in our How-to-section "HOW TO INSERT AN ADVANCED STRING", PAGE 159.

1.9.13 Insert [Calculated field]

The “Calculated Field”-option allows you to evaluate calculations of data from CRM.
The example below shows an evaluated calculation based on CRM fields.

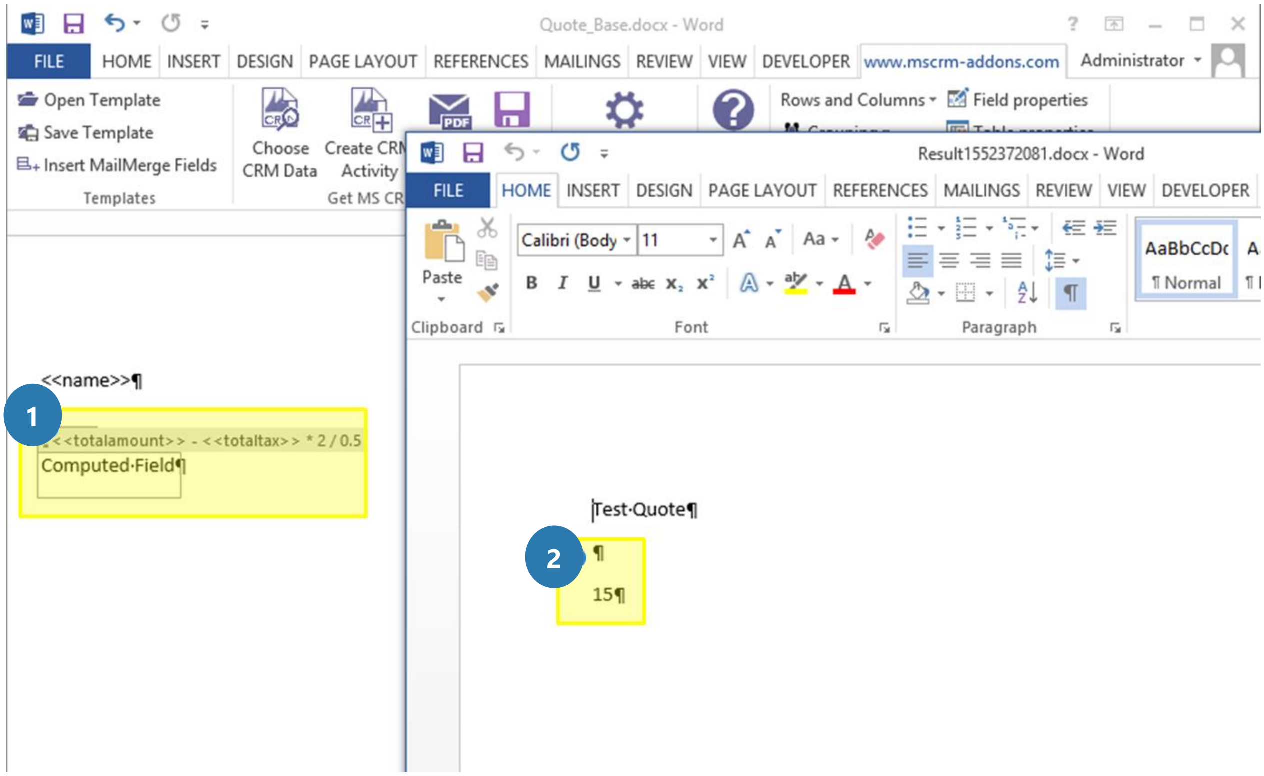


Figure 55: Example of Computed field

Please find a more detailed tutorial in our How-to-section “HOW TO INSERT CALCULATED FIELDS”, PAGE 161.

1.9.14 Insert [Hyperlink]

The "Hyperlink" – option allows you to define a pattern for a dynamically created link.
The syntax for the field is described here (SEE: PAGE 72, 3.1.1 STRINGS (BASIC SYNTAX) F.).

Please find a more detailed tutorial in our How-to-section "How to insert Hyperlink", page 163.

1.9.15 Insert [Condition field]

Certain properties of DocumentsCorePack templates consist of conditions based on Microsoft Dynamics CRM/Dynamics 365 fields. The Condition field functionality property allows you to define dynamic content that is either displayed or removed from the final document based on a certain condition.

The example below shows a template that contains two conditions fields (if else) and the result with the one remaining field.

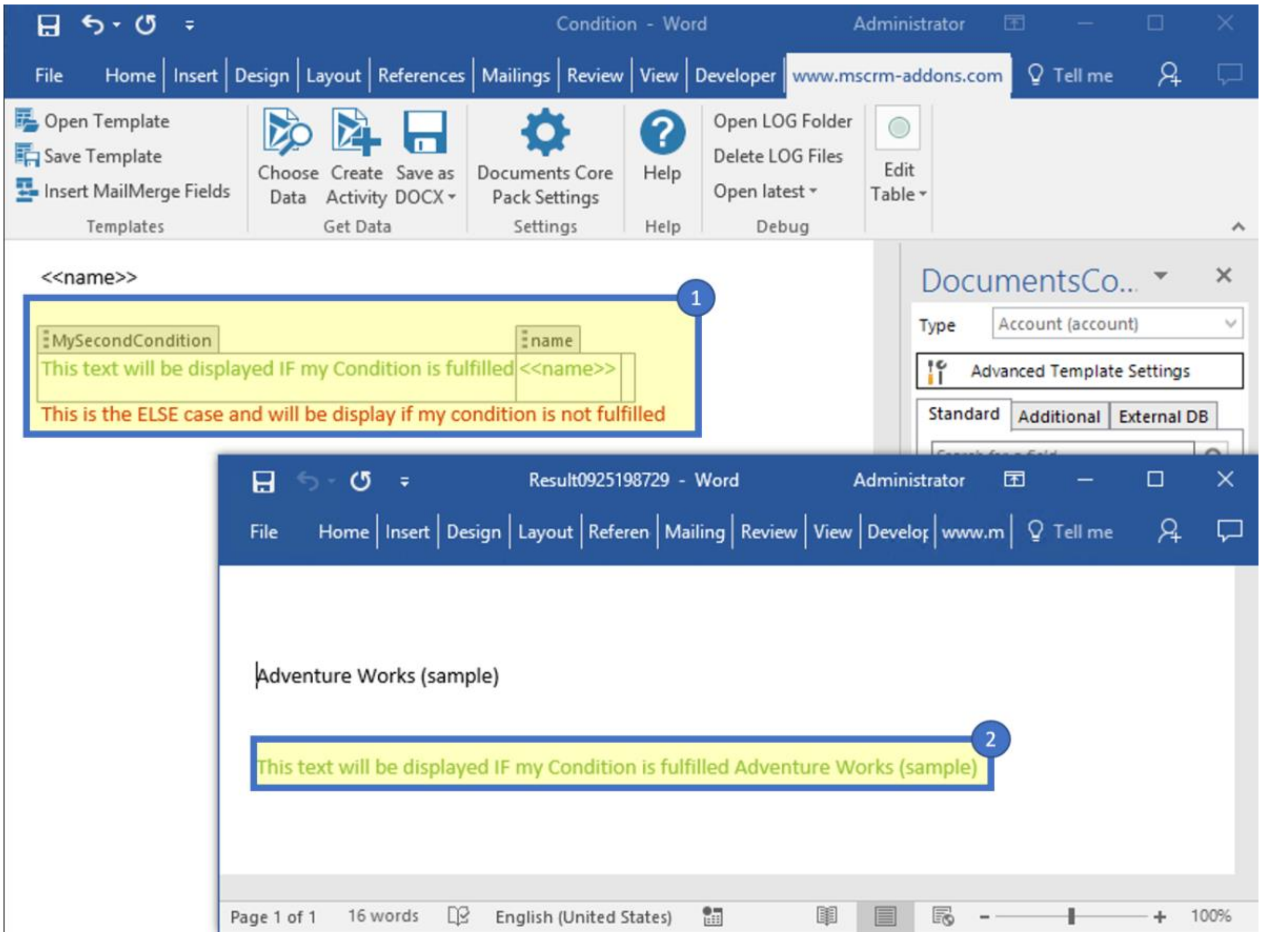


Figure 56: Example of a if else statement

Please find a more detailed tutorial in our How-to-section "HOW TO INSERT CONDITION FIELD", PAGE 165.

1.9.16 Insert [Prompt Field]

Prompts enable the user to add or modify document elements without opening the document. The additional options for prompts are displayed in an additional window of the DocumentsCorePack dialog.

You will find an additional selection in the "Insert Field" -> "Computed Item" -> "Prompt Field". Each entry represents a prompt that you have created previously.

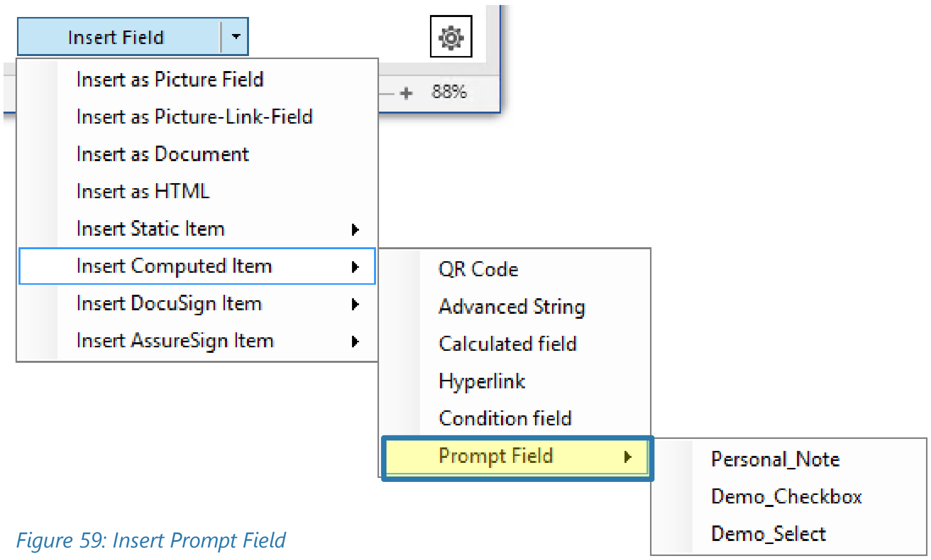


Figure 59: Insert Prompt Field

There are three different types of prompts that you can select: text, checkbox and select. Please find more information and a more detailed tutorial in our How-to-section "How to insert Condition field", page 165.

1.9.17 Insert DocuSign Item

This option requires the installation of a different product. An explicit description can be found on our homepage in the Documentation section here. The guide describing this functionality is called "DocumentsCorePack e-Signature User Guide".

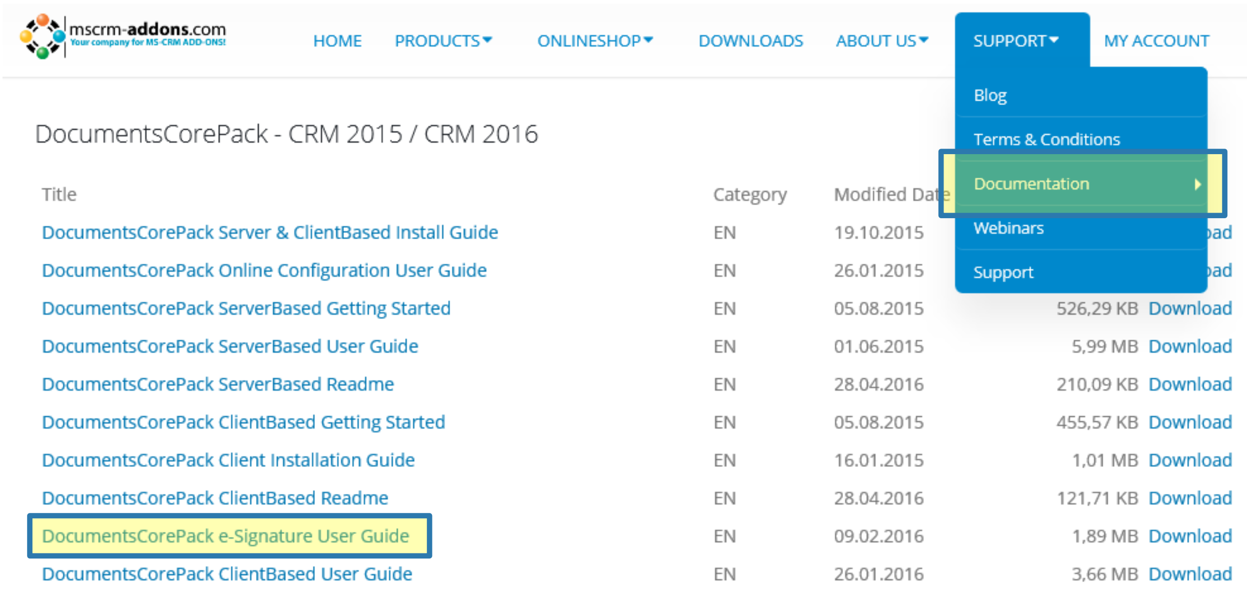


Figure 60: mscrm-addons.com documentation section

1.9.18 Insert AssureSign Item

This option requires the installation of a different product. An explicit description can be found on our homepage in the Documentation section here. The guide describing this functionality is called "DocumentsCorePack e-Signature User Guide".

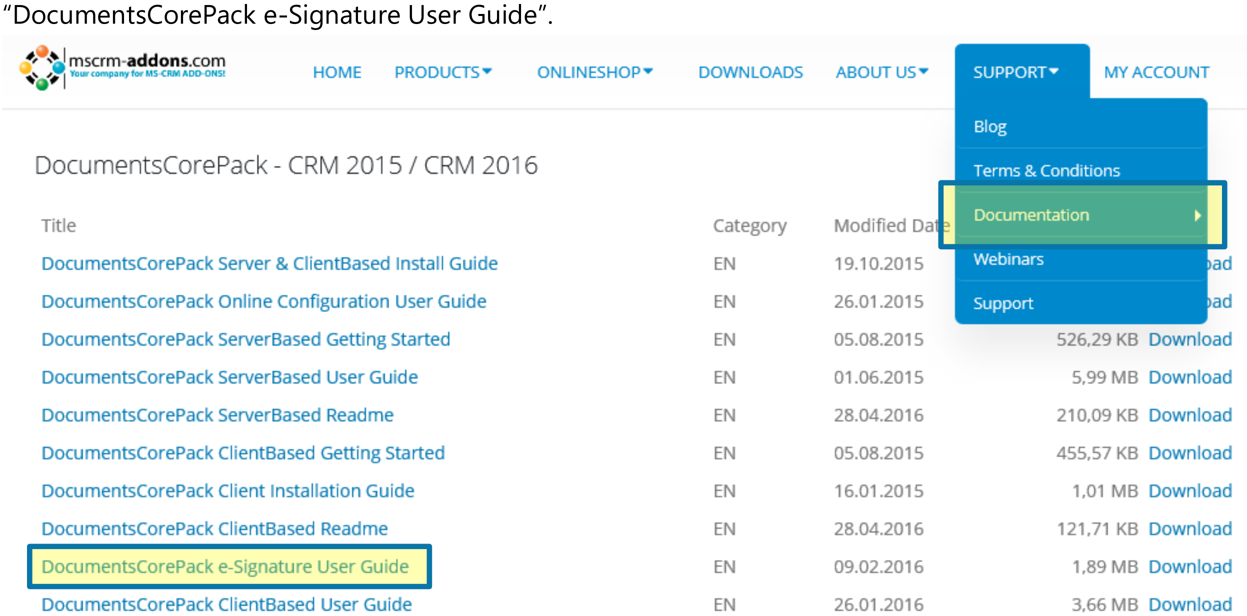


Figure 61: mscrm-addons.com documentation section

1.10 Field Properties

Depending on the type of the field type that you have added to the document, you can call the properties windows. To do so, simply click on the corresponding field ❶ and then on the ***[Field properties]***-button ❷.

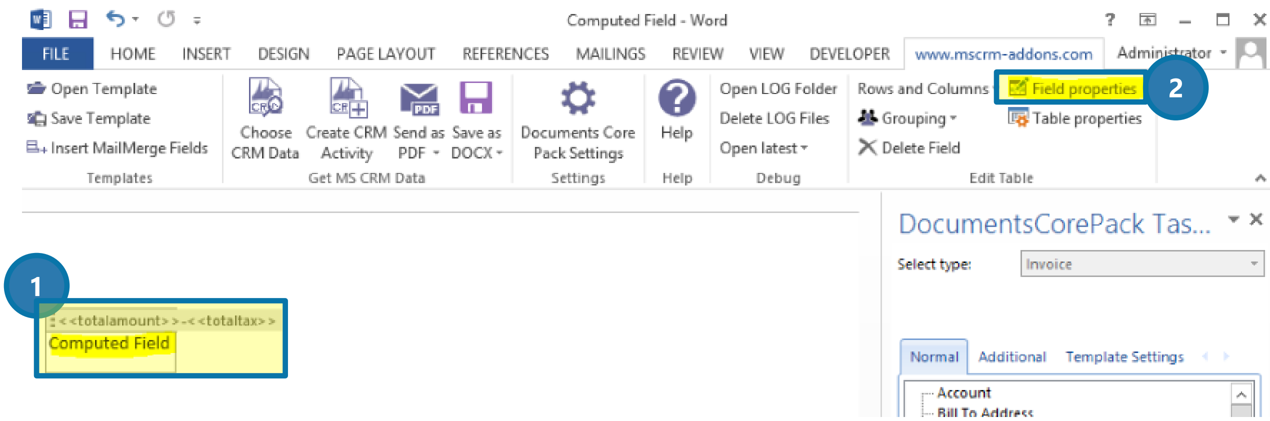


Figure 62: mscrm-addons.com documentation section

Field properties can also be opened via the context menu. To do so, simply right-click on the inserted field.

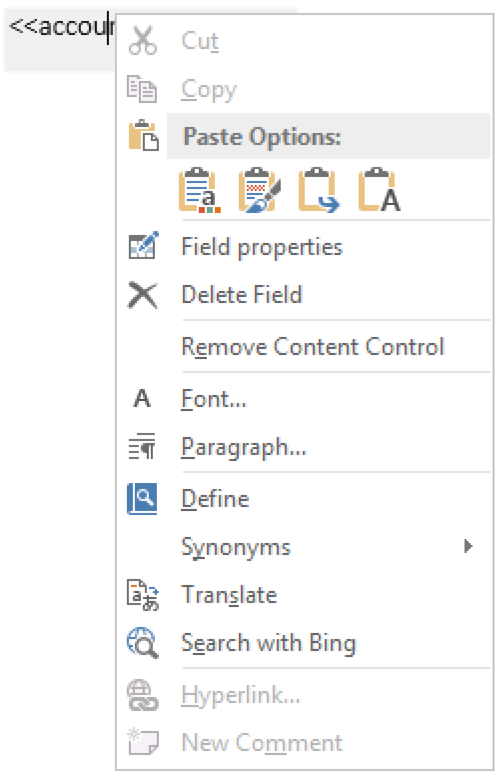


Figure 63: Open field properties via the context menu

Please find a more detailed tutorial in our How-to-section "How to modify Field Properties", page 190.

However, there are a few types of field properties in Microsoft Dynamics 365 (CRM).

1.10.1 String-fields

String fields are text fields that support you when it comes to the creation of text. In order to configure them, simply check the *Delete line/row if whole line/row is empty*-box if you want to delete the whole row should the field be empty. Check the *Delete line/row if this field is empty*-box if you want to delete the field only if the field is empty.

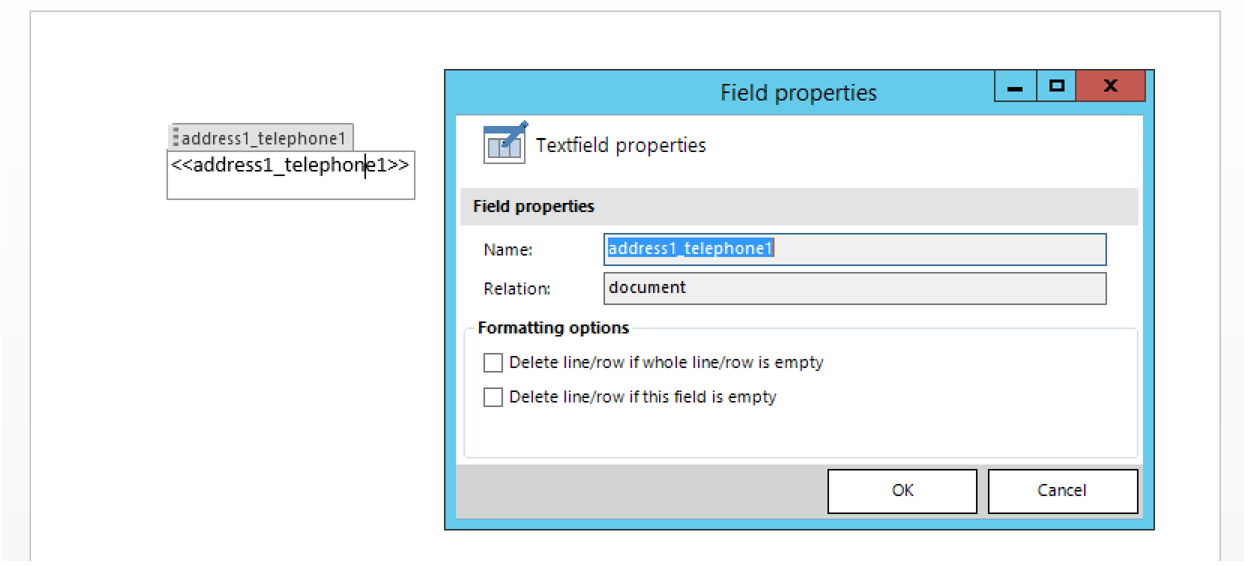


Figure 64: String fields

1.10.2 Date fields

Data fields allow you to insert dates, like for example *Created on*. In order to configure them, you can select a format and a culture in the corresponding drop-down menu. Please have a look at CHAPTER 5.28.1 HOW TO DEFINE A CUSTOM DATE FORMAT ON PAGE 190 in order learn how to create a custom date format.

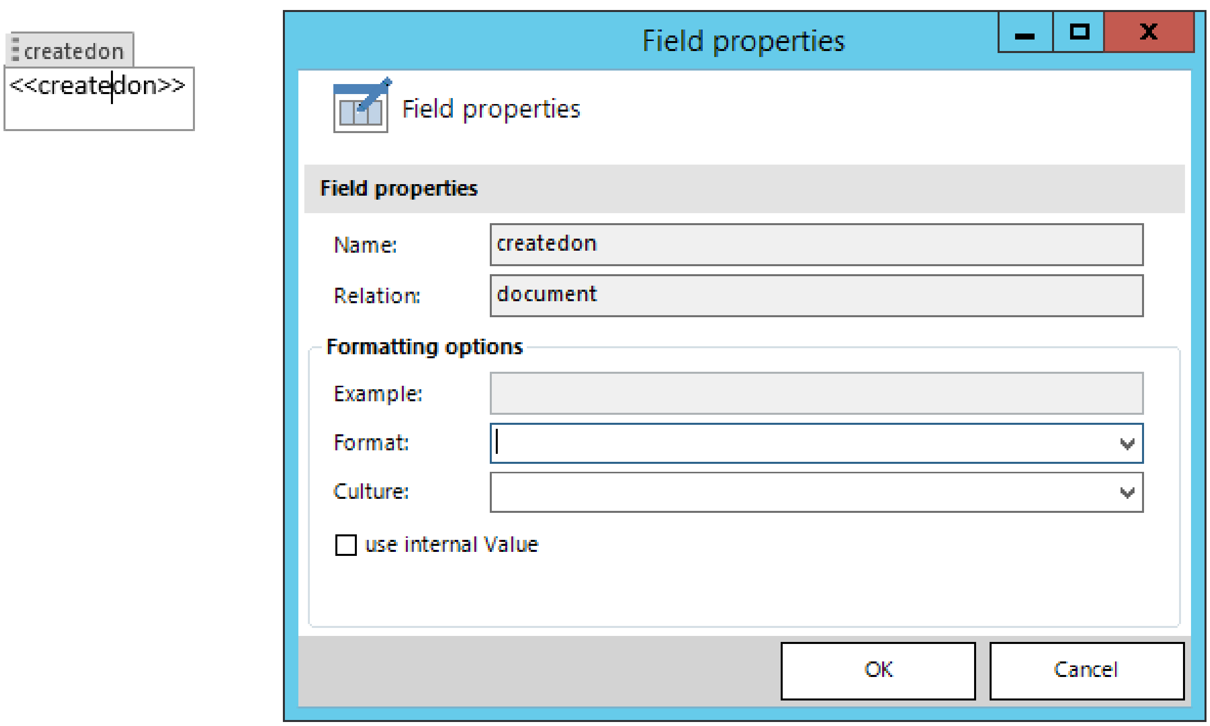


Figure 65: Data fields

As you see here, you are provided with many different data formats.

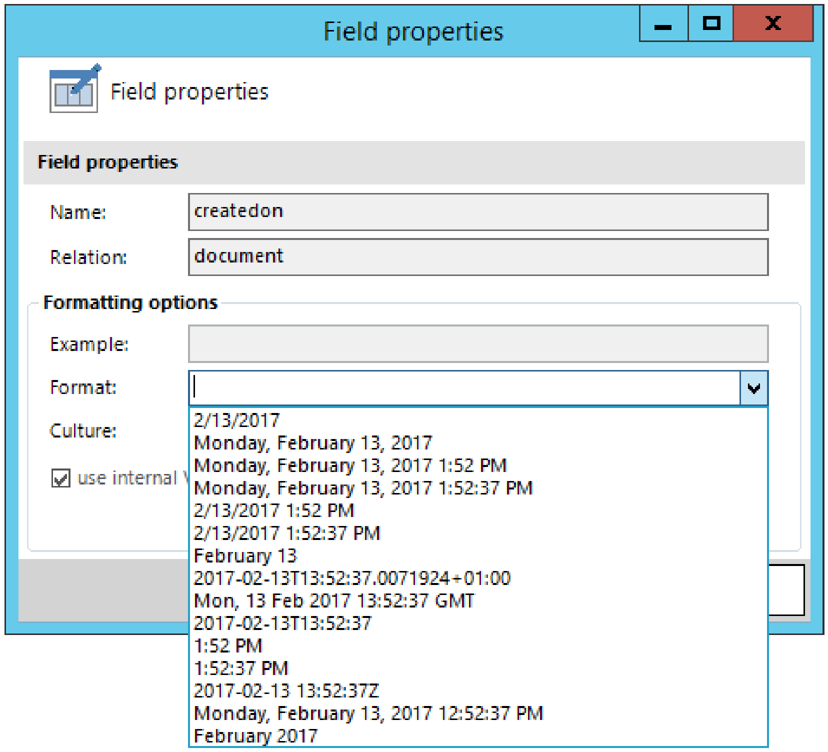


Figure 66: Insert Format

… and culture as well. In order to insert a culture, simply select your preferred one from the list.

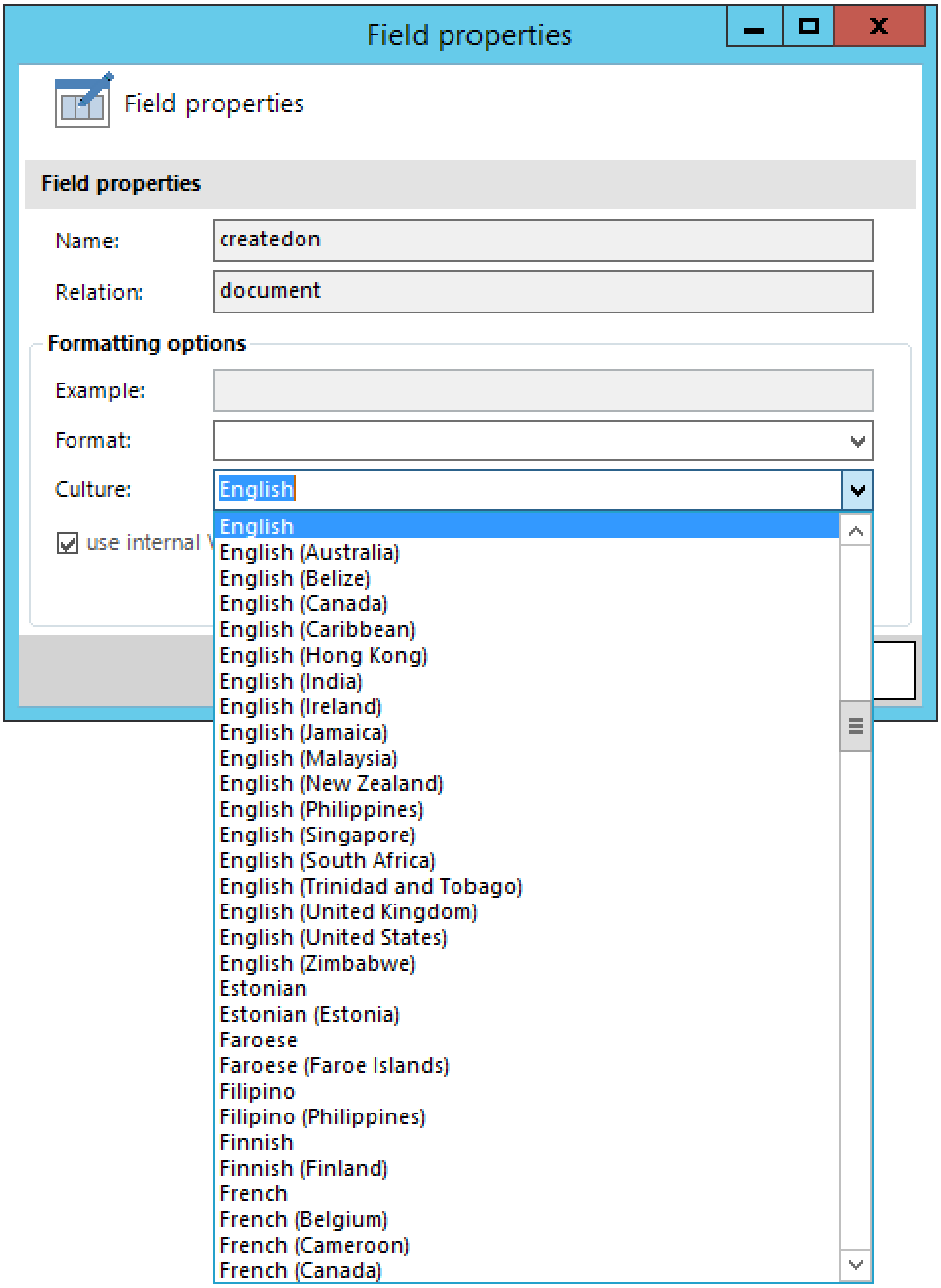


Figure 67: Insert Culture

1.10.3 Number fields

Number fields allow you to insert digits, like for example money fields, age fields or quote numbers. In order to configure them, you can select a format and a culture in the corresponding drop-down menu. Please have a look at CHAPTER 5.28.2 HOW TO CREATE A CUSTOM 16-DIGITS NUMBER field ON PAGE 191 in order learn how to create a 16-digits custom number.

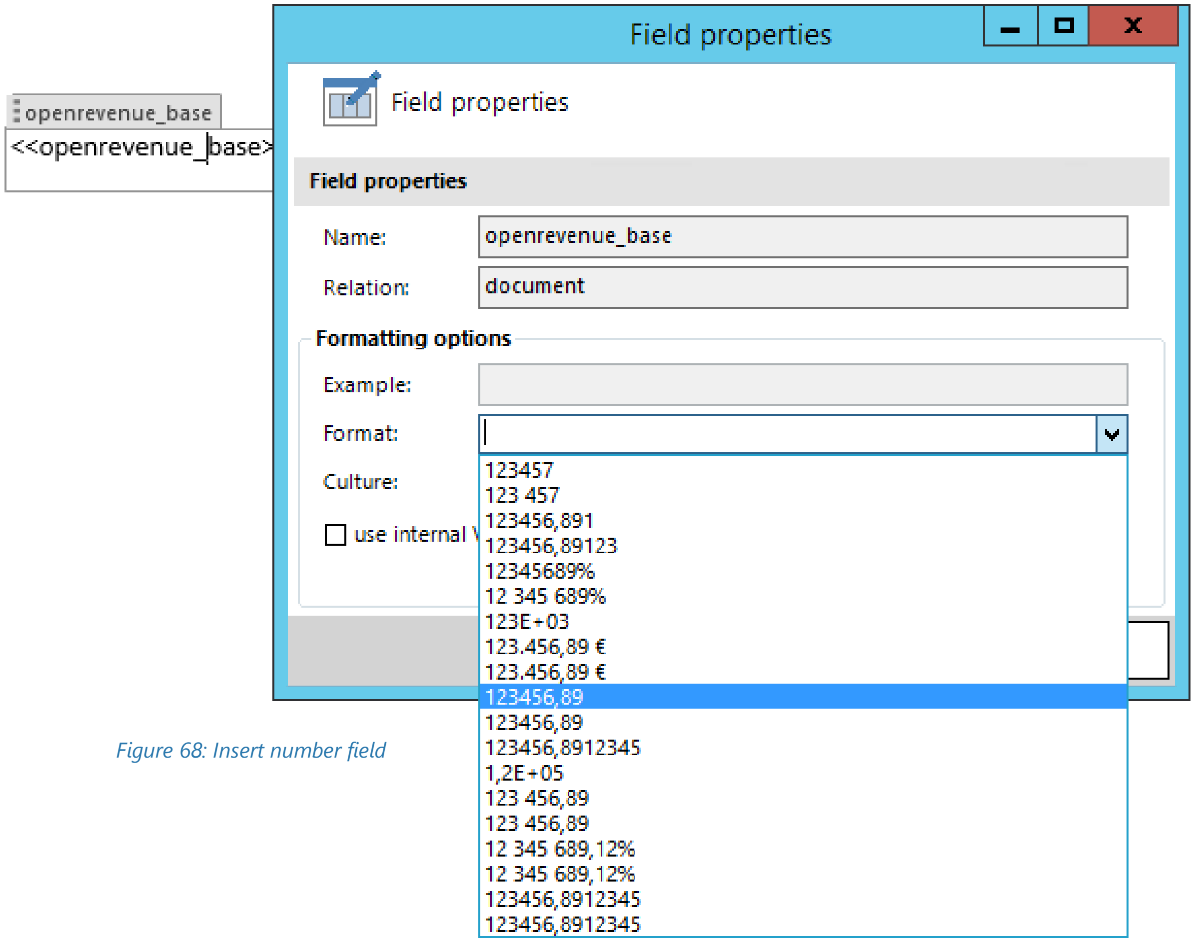


Figure 68: Insert number field

1.10.4 Picklist fields

Picklist fields allow you to insert picklists. In order to configure them, you can select a format and a culture in the corresponding drop-down menu. Check the *use internal Value*-checkbox in order to activate a function that inserts a field independent from the language.

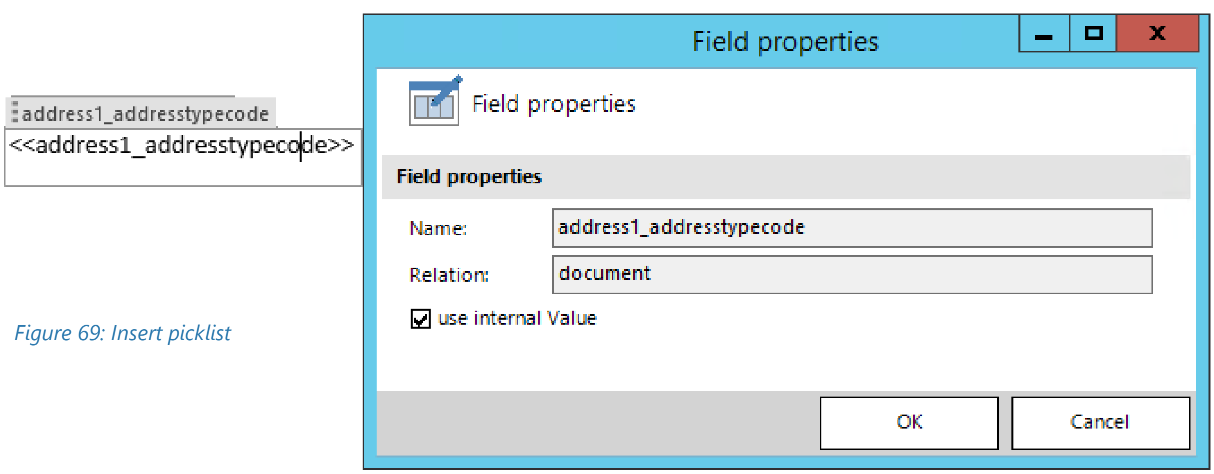


Figure 69: Insert picklist

Once the field is inserted including the internal value, the term *ovalue* will be added to the field.

Figure 70: Picklist field inserted plus internal value

2 DocumentsCorePack Template Designer Advanced

The following chapters provide you with an overview of the advanced capabilities of Template Designer. They focus on the following options:

- Add entities
- Manage tables

2.1 Manage Tables

The manage tables function allows you to insert/manage/edit/customize tables and relationships. To open it, simply open the ***[Add Relationship/Entity]***-Drop Down menu in the DocumentsCorePack Additional tab and select the option *Manage relationships* in the menu you are provided with.

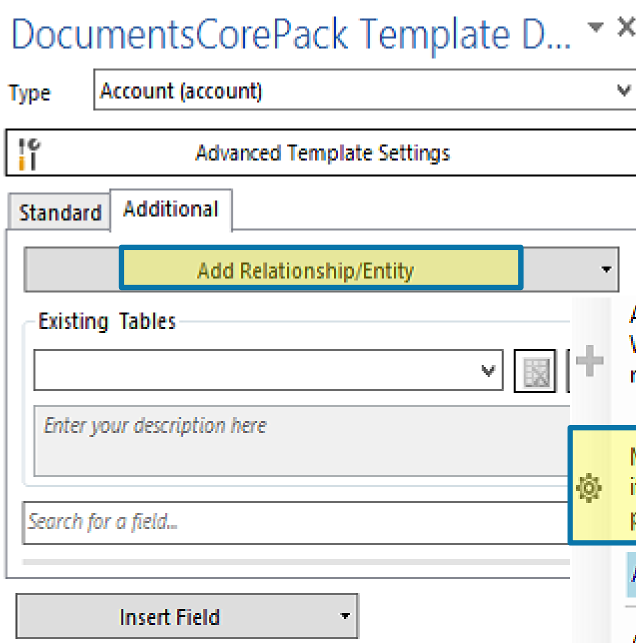


Figure 71: Template Designer – Add Relationship/Entity

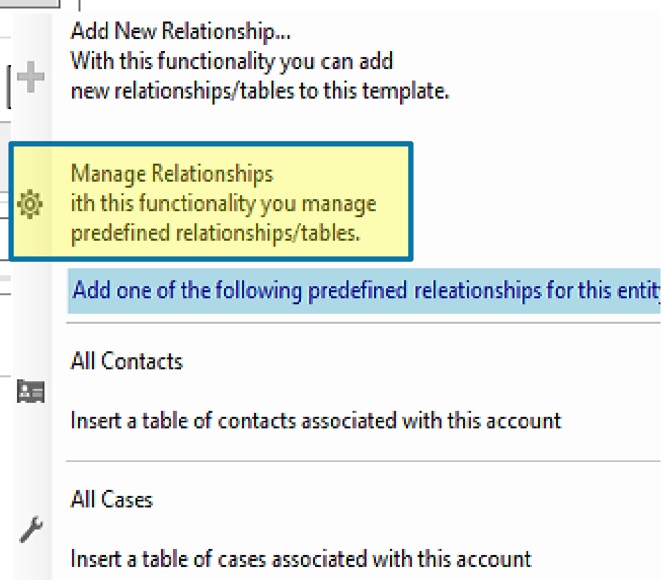


Figure 72: Add Relationship/Entity – Drop Down Menu

2.1.1 The manage relationship window

All customizations for tables and relationships can be done here.

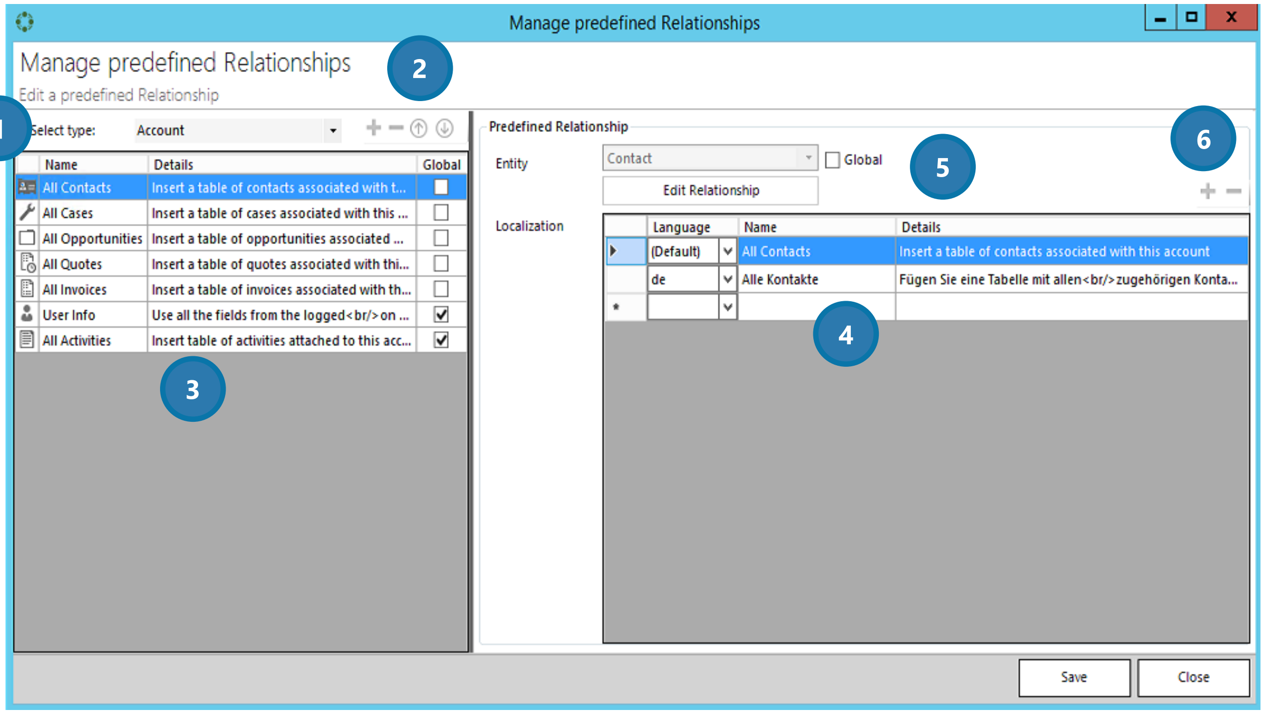


Figure 73: Manage relationships window

① Select type drop down

In the select type drop-down menu, you can select which type of entity you would like to work with.

The details shown in the list (see ③) vary – depending on which entity you have previously selected. Global relations (which are checked automatically) are the same for all entities, whereas special relations have to be checked by the user.

②

The plus, the minus and the up and down arrows allow you to customize your buttons.


Figure 74: Customize entities buttons

Click on the ***[Plus]***-button in order to add a predefined relationship. For further information on how to do so please have a look at chapter 1.8 ADDITIONAL RELATIONSHIPS, PAGE 42.

The ***[Minus]***-button allows you to delete predefined relationships. To do so, simply mark the relationship you would like to delete and click on the ***[Yes]***-button when you are asked if you want to delete it.

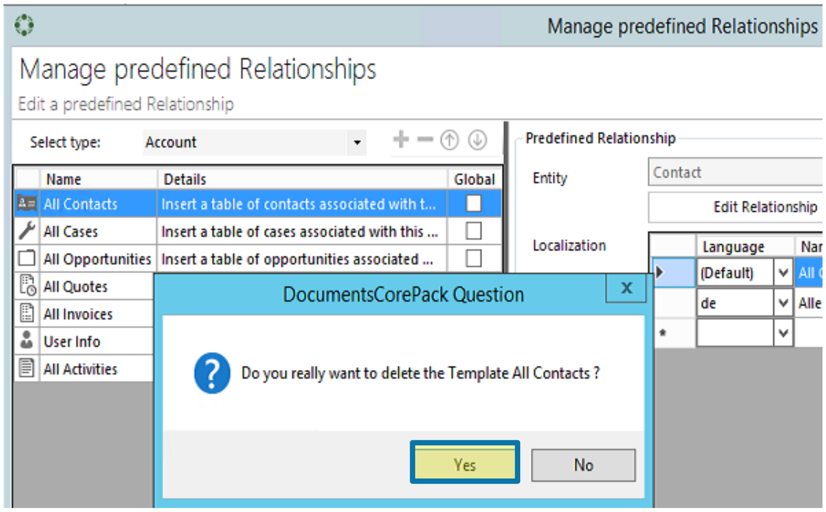


Figure 75: Manage Relationships – how to delete relationships

The ***[Up]*** and ***[Down]***- arrow buttons allow you to determine in which order the relationships should appear in the *Add Relationship/Entity drop-down menu*. For more information on that menu, please have a look at CHAPTER 1.7.1 ADD RELATIONSHIPS/ENTITY, PAGE 40.

❸ The *select type list preview* gives you an overview of the relations that are displayed in the *Add Relationship/Entity drop-down menu*. For more information on that menu, please have a look at CHAPTER 1.7.1 ADD RELATIONSHIPS/ENTITY, PAGE 40.

❹ The *select localization list preview* offers you the possibility to customize your entities regarding the languages that you use in your Microsoft Dynamics CRM/Dynamics 365 settings.

❺

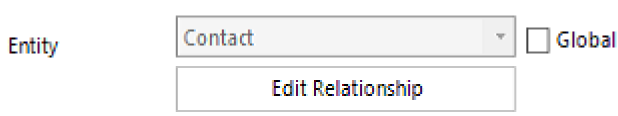


Figure 76: Manage predefined relationships – entity settings

The entity settings at the right side allow you to customize the entity that is related to your previously selected main entity in the type selector. If the checkbox next to *Global* is checked, the entity will be added to the global entities of this relation.

❻ Hit the ***[Plus]***-button in order to add a new field to the *select localization list preview*. Hit the ***[Minus]***-button in order to delete a previously marked field.

3 Advanced template options

Besides the standard options, DocumentsCorePack Template Designer offers additional options that facilitate the designing of templates, such as:

- Advanced syntax structures
- Calculate (advanced) arithmetic issues

The following chapters provide you with an overview of the advanced template options.

3.1 DocumentsCorePack Client Property Syntax and Designer options

Certain properties of DocumentsCorePack templates can consist of fixed text and CRM fields. There are also some additional function calls available. Also, data from CRM can be manipulated.

Several DocumentsCorePack properties support the same syntax. The two major different syntax types are strings and calculations.

Conditions can be now easily edited with the new Condition Designer.

3.1.1 Strings (basic syntax)

The basic syntax for string properties follows the following rules.

The fixed text has to be typed manually in the text field and has to be enclosed with single quotes (" ' ").

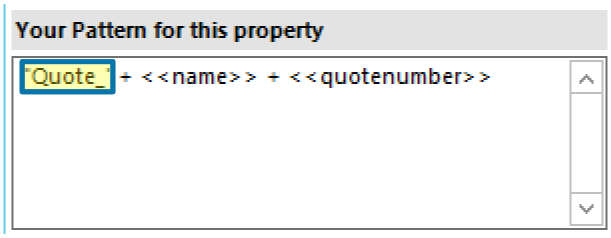


Figure 77: Property syntax - fixed text

The fixed text has to be typed manually in the text field and has to be enclosed with single quotes (" ' ").

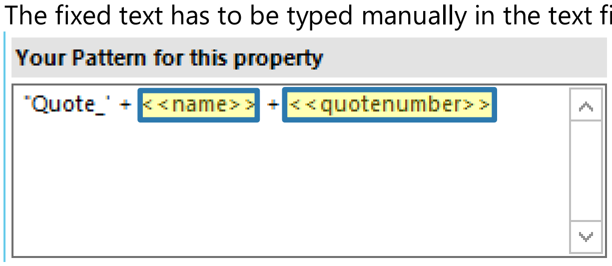


Figure 78: Property syntax - fields

To combine several CRM fields and fixed text you have to use the plus sign ("+").

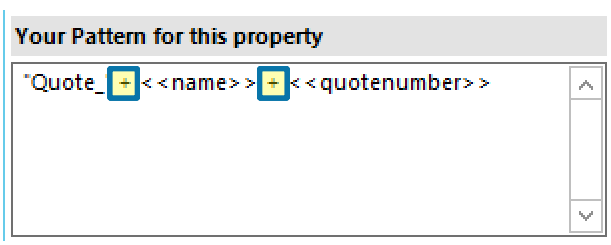


Figure 79: Property syntax - plus signs

3.1.2 Strings (advanced syntax)

Function calls can be applied to CRM fields by using the "." and the actual function call. There are also standalone method calls supported. The function call has to end with brackets. Certain functions also support parameters or have mandatory parameters.

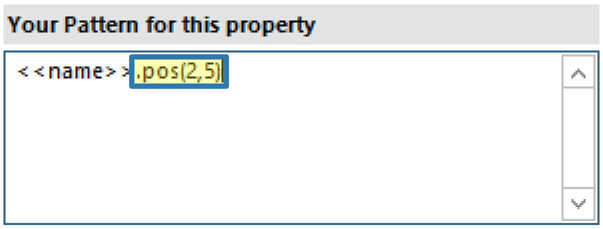


Figure 80: Property syntax - function call pos with parameters 2 and 5

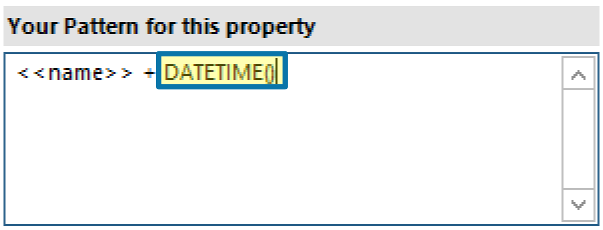


Figure 81: Property syntax - Standalone function DATETIME without parameters

The following table contains a list with all available functions that can be applied to CRM fields.
For all examples below please assume the <<*name*>> field will be "*MSCRM-addons.com*" after the merge.

Function	Description	Example
<<name>>.pos(x,y)	will insert y signs from the xth position.	<<name>>.pos(2,5) Result: "CRM-a"
<<name>>.left(x)	will insert the first x – signs. E.g.: <<name>>.left(5)	<<name>>.left(5) Result: "MSCRM"
<<name>>.right(x)	will insert the last x signs of the string. E.g.: <<name>>.right(3)	<<name>>.right(3) Result: "com"
<<name>>.upper()	displays all values in the field in capital letters.	Result: "MSCRM-ADDONS.COM"
<<name>>.lower()	displays all values in the field in small letters.	Result: "mscrm-addons.com"
<<name>>.caps()	displays the first letter in the field before as capital letter.	Result: "Mscrm-addons.com"
<<name>>.firstcaps()	displays the first letter in a sentence in capital letter	Mscrm-addons.com
<<name>>.invert()	reverses every case	Result: "mscrm-ADDONS.COM"

Figure 82: Table - List of function calls for fields

The following table contains a list with all available functions that can stand alone to CRM fields

Function	Description	Example
guid()	generates a unique serial number	b8a4d649-342e-4bfc-9a6f-b4afd4741b4
DATETIME()	inserts the actual and local date and time	06.12.2013 16:06
DATETIME(DD.MMMM.YY mm:ss, de-DE)	There are many different formatting options for displaying the culture name for different countries For more information please have a look at CHAPTER 3.2.3 CULTURES ON PAGE 87.	06.Dezember.1316:06
DATETIME(DD.MMMM.YY ' ' mm:ss, de-DE)	For more information about the different cultures which can be displayed, please have a look at CHAPTER 3.2.3 CULTURES ON PAGE 87.	06.Dezember.13 16:06

Figure 83: Table - List of standalone functions

3.1.3 Calculations

The syntax for this field supports the basic arithmetic operations.
/ divide
* multiply
+ add up
- subtract

3.1.4 Condition Designer

The Condition Designer has a similar look and feel like the standard "Advanced Find" dialog in Dynamics 365. Also, the available options are similar. The Designer is part of the Condition Field functionality of DocumentsCorePack.

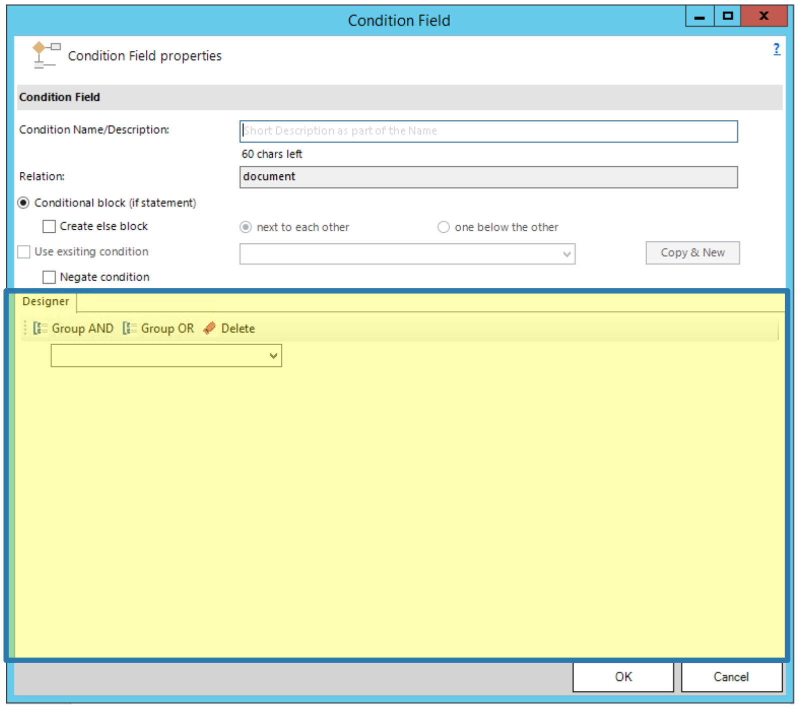


Figure 84: The Condition Designer within the condition field dialog

To create your condition, you have to:

1. SELECT A FIELD FROM THE DROP-DOWN MENU

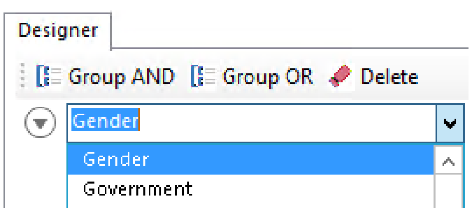


Figure 85: Field selection

2. SELECT AN OPERATOR

Depending on the field type you will see different available operators.

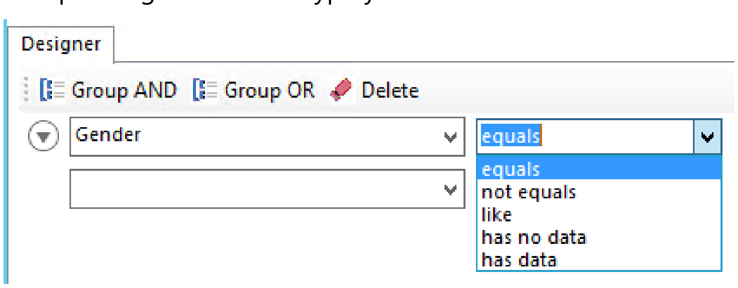


Figure 86: Operator selection

3. Select or enter a compare value

Depending on the data type of the field you either have 1 an additional control that opens a new 2 dialog to select and compare values. Or you can enter the value directly by typing.

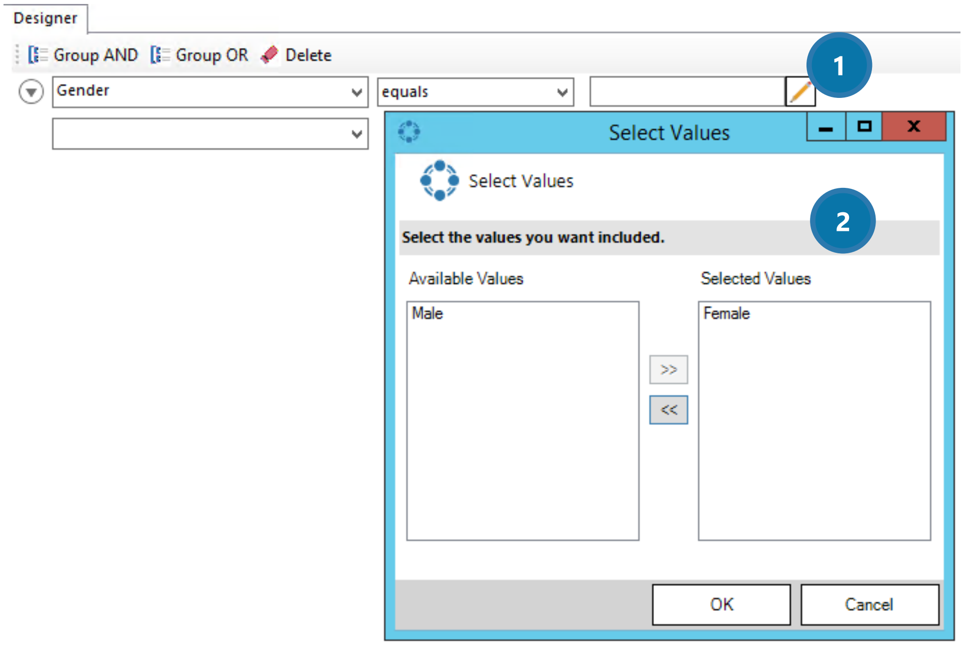


Figure 87: Selection dialog for picklist elements

Below you can see other possible data types for your conditions:

Date field

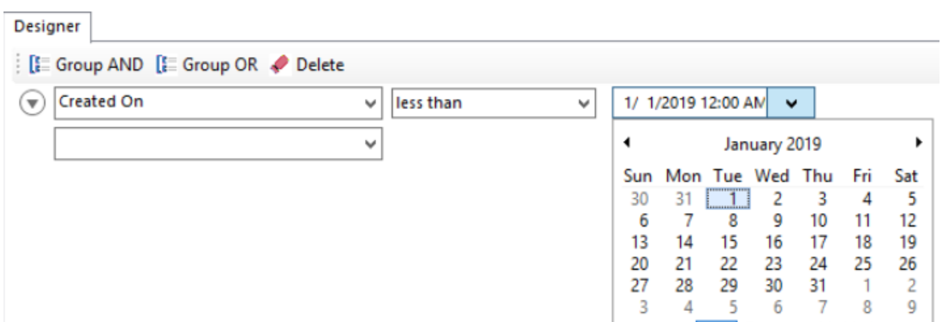


Figure 88: Example of a date field

String field

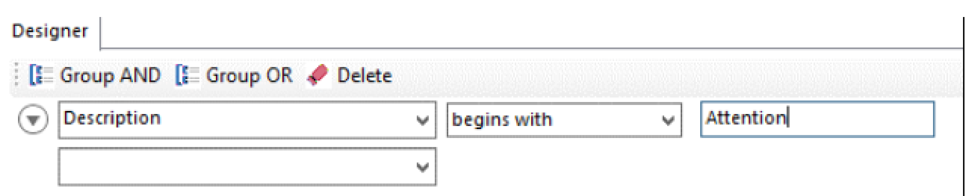


Figure 89: Example of a string field

4. Repeat steps 1 to 3 to add other lines to setup more complex conditions

All single lines are brought together to one single condition.

5. Group your lines [optional]

Select the required rows by using the 1 menu that opens when you hit the arrow button.

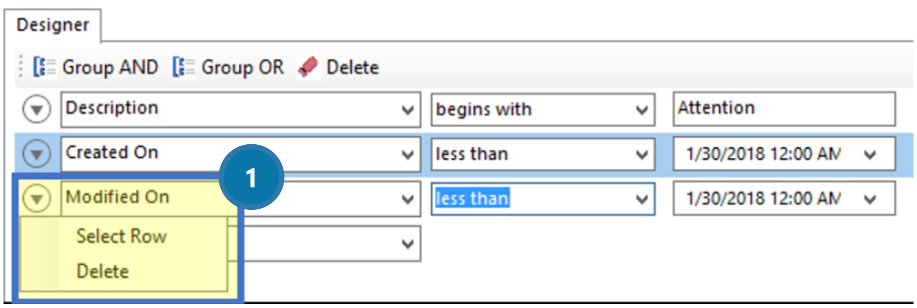


Figure 90: Select row

The selected rows will stay 2 highlighted. Select the required 3 grouping option.

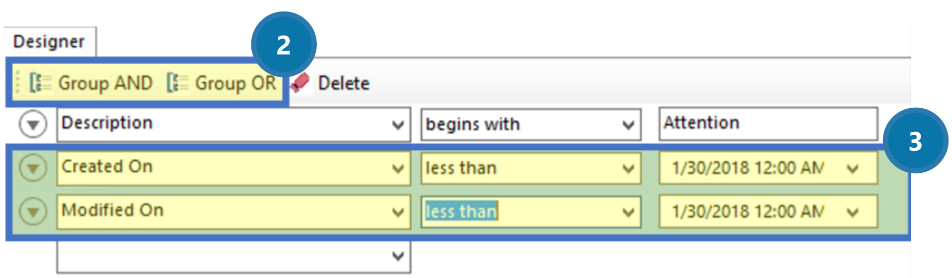


Figure 91: Highlighted rows

After selecting grouping a box will visually show the grouping.

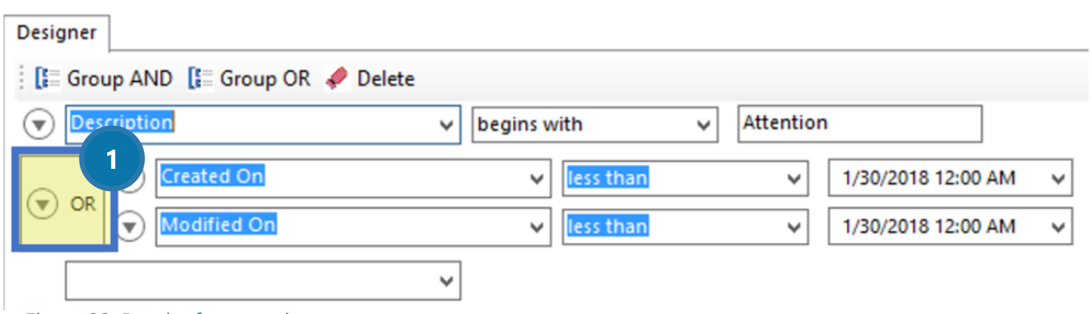


Figure 92: Result after grouping

3.1.5 DateTime Field Syntax

The *DateTime Field* option of DocumentsCorePack allows you to perform basic calculations on dates and times. This article describes the syntax that can be used for those calculations.

1. The basic syntax:
   Fields from Dynamics are enclosed by "<<" and ">>" when you insert them from the tree view.

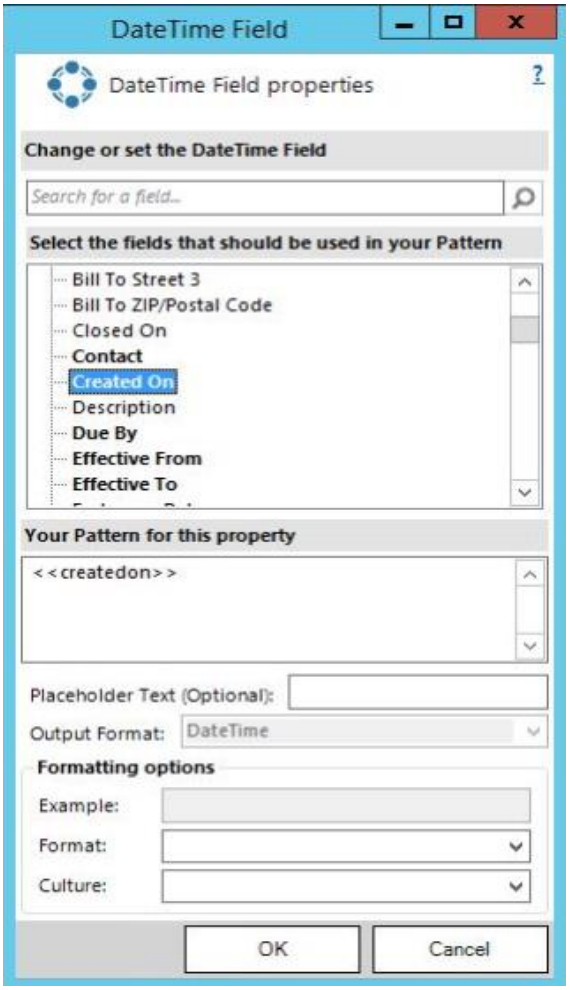


Figure 93: Fields

2. The difference between two dates can be subtracted by using a "-"

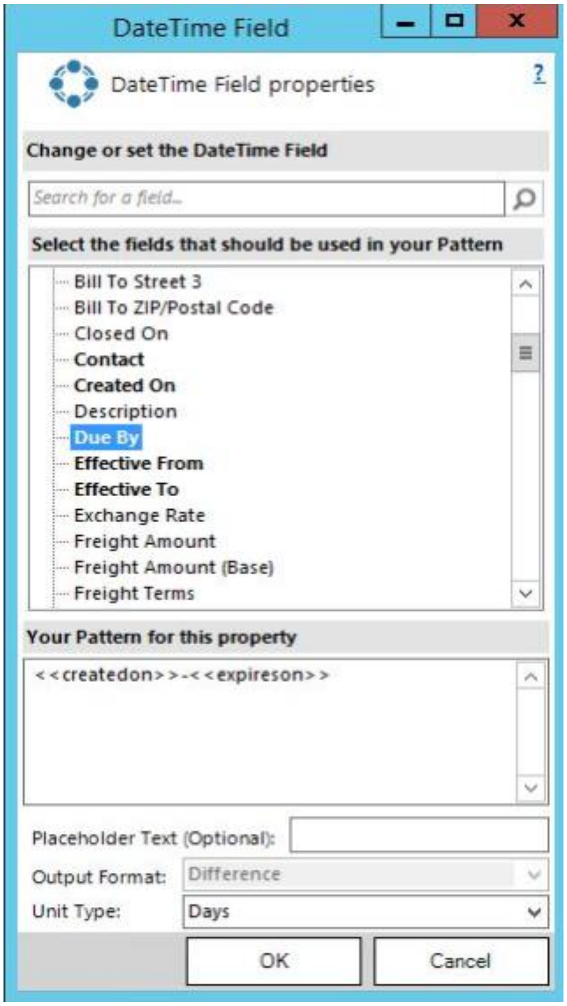


Figure 94: Difference between two dates

3. Functions on a date can be executed by adding a dot "." and the function name including the necessary parameters.

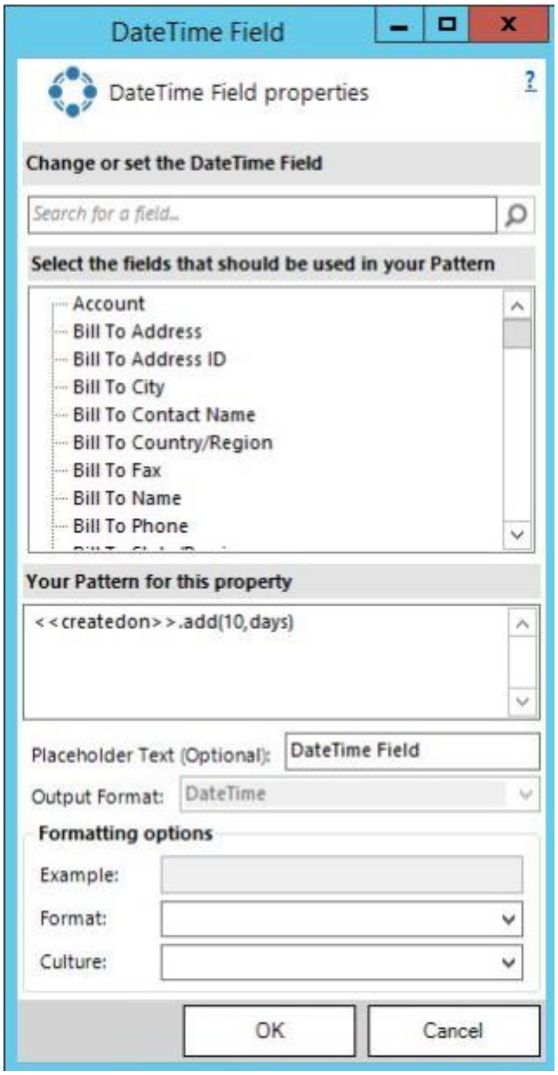


Figure 95: Function call with parameters

4. Supported functions and operators

Operator Name	***Sign***	***Example***
Difference	-	<<duedate>> – DATETIME() e.g. An offer with a due date minus today´s data to calculate.

Operator table

Function	***Description***	***Examples***
Add(value, unit)	Adds a numeric value to the current date. The first parameter represents the numeric value that should be added. The second parameter represents the unit. Parameters for units are either: year, month, weeks, days, hours, minutes, seconds, milliseconds	<>.Add(10,year)
Subtract(value, unit)	Subtracts a numeric value form the current date. The first parameter represents the numeric value that should be subtracted. The second parameter represents the unit. Parameters for units are either: year, month, weeks, days, hours, minutes, seconds, milliseconds	<>.Subtract(10,year)
Addbusinessdays(value)	Adds a certain amount of days to the current date. Weekends (Saturday and Sunday) are excluded from this calculation.	<>.Addbusinessdays(10)
Round(unit, direction)	Round allows you to modify a time value to the next or previous quarter, half or full hour. The first parameter can display a quarter, half or full hour. The second parameter represents the direction. (up/down)	<>.Round(quarter,up) <>.Round(half,down) <>.Round(full)
DATETIME()	This call returns the current date and can be used as field followed with any of the above methode calls.	DATETIME().add(5,days)

Function table

You cannot join several functions calls. If you would like to add days and months, please always use the lowest unit for your call.
e.g. 1 Month and 15 Days would be 45 Days.

3.2 Additional field specific formatting capabilities

This chapter provides you with an overview of the additional field specific formatting capabilities of DocumentsCorePack Template Designer. Please have a look at CHAPTER 1.10 FIELD PROPERTIES ON PAGE 61 for some general information on field properties.

3.2.1 Date fields

This table provides you with an overview of all possible additional date field customizations. Please have a look at CHAPTER 5.28.1 HOW TO DEFINE A CUSTOM DATE FORMAT ON PAGE 190 in order learn how to create a custom date format.

Format specifier	Description	Example
"d"	The day of the month, from 1 through 31.	6/1/2009 1:45:30 PM -> 1 6/15/2009 1:45:30 PM -> 15
"dd"	The day of the month, from 01 through 31.	6/1/2009 1:45:30 PM -> 01 6/15/2009 1:45:30 PM -> 15
"ddd"	The abbreviated name of the day of the week.	6/15/2009 1:45:30 PM -> Mon (en-US) 6/15/2009 1:45:30 PM -> Пн (ru-RU) 6/15/2009 1:45:30 PM -> lun. (fr-FR)
"f"	The tenths of a second in a date and time value.	6/15/2009 13:45:30.617 -> 6 6/15/2009 13:45:30.050 -> 0
"ff"	The hundredths of a second in a date and time value.	6/15/2009 13:45:30.617 -> 61 6/15/2009 13:45:30.005 -> 00
"fff"	The milliseconds in a date and time value.	6/15/2009 13:45:30.617 -> 617 6/15/2009 13:45:30.0005 -> 000
"ffff"	The ten-thousandths of a second in a date and time value.	6/15/2009 13:45:30.6175 -> 6175 6/15/2009 13:45:30.00005 -> 0000
"fffff"	The hundred-thousandths of a second in a date and time value.	6/15/2009 13:45:30.61754 -> 61754 6/15/2009 13:45:30.000005 -> 00000
"ffffff"	The millionths of a second in a date and time value.	6/15/2009 13:45:30.617542 -> 617542 6/15/2009 13:45:30.0000005 -> 000000
"fffffff"	The ten-millionths of a second in a date and time value.	6/15/2009 13:45:30.6175425 -> 6175425 6/15/2009 13:45:30.0001150 -> 0001150

"F"	If non-zero, the tenths of a second in a date and time value.	6/15/2009 13:45:30.617 -> 6 6/15/2009 13:45:30.050 -> (no output)
"FF"	If non-zero, the hundredths of a second in a date and time value.	6/15/2009 13:45:30.617 -> 61 6/15/2009 13:45:30.005 -> (no output)
"FFF"	If non-zero, the milliseconds in a date and time value.	6/15/2009 13:45:30.617 -> 617 6/15/2009 13:45:30.0005 -> (no output)
"FFFF"	If non-zero, the ten-thousandths of a second in a date and time value.	6/1/2009 13:45:30.5275 -> 5275 6/15/2009 13:45:30.00005 -> (no output)
"FFFFF"	If non-zero, a hundred-thousandths of a second in a date and time value.	6/15/2009 13:45:30.61754 -> 61754 6/15/2009 13:45:30.000005 -> (no output)
"FFFFFF"	If non-zero, the millionths of a second in a date and time value.	6/15/2009 13:45:30.617542 -> 617542 6/15/2009 13:45:30.0000005 -> (no output)
"FFFFFFF"	If non-zero, the ten-millionths of a second in a date and time value.	6/15/2009 13:45:30.6175425 -> 6175425 6/15/2009 13:45:30.0001150 -> 000115
"g", "gg"	The period or era.	6/15/2009 1:45:30 PM -> A.D.
"h"	The hour, using a 12-hour clock from 01 to 12.	6/15/2009 1:45:30 AM -> 1 6/15/2009 1:45:30 PM -> 1
"hh"	The hour, using a 12-hour clock from 01 to 12.	6/15/2009 1:45:30 AM -> 01 6/15/2009 1:45:30 PM -> 01
"H"	The hour, using a 24-hour clock from 0 to 23.	6/15/2009 1:45:30 AM -> 1 6/15/2009 1:45:30 PM -> 13
"HH"	The hour, using a 24-hour clock from 00 to 23.	6/15/2009 1:45:30 AM -> 01 6/15/2009 1:45:30 PM -> 13
"K"	Time zone information.	With DateTime values: 6/15/2009 1:45:30 PM, Kind Unspecified -> 6/15/2009 1:45:30 PM, Kind Utc –> Z 6/15/2009 1:45:30 PM, Kind Local -> -07:00 (depends on local computer settings) With DateTimeOffset values: 6/15/2009 1:45:30 AM -07:00 --> -07:00 6/15/2009 8:45:30 AM +00:00 --> +00:00
"m"	The minute, from 0 through 59.	6/15/2009 1:09:30 AM -> 9 6/15/2009 1:09:30 PM -> 9
"mm"	The minute, from 00 through 59.	6/15/2009 1:09:30 AM -> 09 6/15/2009 1:09:30 PM -> 09
"M"	The month, from 1 through 12.	6/15/2009 1:45:30 PM -> 6
"MM"	The month, from 01 through 12.	6/15/2009 1:45:30 PM -> 06

"MMM"	The abbreviated name of the month.	6/15/2009 1:45:30 PM -> Jun (en-US) 6/15/2009 1:45:30 PM -> juin (fr-FR) 6/15/2009 1:45:30 PM -> Jun (zu-ZA)
"MMMM"	The full name of the month.	6/15/2009 1:45:30 PM -> June (en-US) 6/15/2009 1:45:30 PM -> juni (da-DK) 6/15/2009 1:45:30 PM -> uJuni (zu-ZA)
"s"	The second, from 0 through 59.	6/15/2009 1:45:09 PM -> 9
"ss"	The second, from 00 through 59.	6/15/2009 1:45:09 PM -> 09
"t"	The first character of the AM/PM designator.	6/15/2009 1:45:30 PM -> P (en-US) 6/15/2009 1:45:30 PM -> 午 (ja-JP) 6/15/2009 1:45:30 PM -> (fr-FR)
"tt"	The AM/PM designator.	6/15/2009 1:45:30 PM -> PM (en-US) 6/15/2009 1:45:30 PM -> 午後 (ja-JP) 6/15/2009 1:45:30 PM -> (fr-FR)
"y"	The year, from 0 to 99.	1/1/0001 12:00:00 AM -> 1 1/1/0900 12:00:00 AM -> 0 1/1/1900 12:00:00 AM -> 0 6/15/2009 1:45:30 PM -> 9
"yy"	The year, from 00 to 99.	1/1/0001 12:00:00 AM -> 01 1/1/0900 12:00:00 AM -> 00 1/1/1900 12:00:00 AM -> 00 6/15/2009 1:45:30 PM -> 09
"yyy"	The year, with a minimum of three digits.	1/1/0001 12:00:00 AM -> 001 1/1/0900 12:00:00 AM -> 900 1/1/1900 12:00:00 AM -> 1900 6/15/2009 1:45:30 PM -> 2009
"yyyy"	The year as a four-digit number.	1/1/0001 12:00:00 AM -> 0001 1/1/0900 12:00:00 AM -> 0900 1/1/1900 12:00:00 AM -> 1900 6/15/2009 1:45:30 PM -> 2009
"yyyyy"	The year as a five-digit number.	1/1/0001 12:00:00 AM -> 00001 6/15/2009 1:45:30 PM -> 02009
"z"	Hours offset from UTC, with no leading zeros.	6/15/2009 1:45:30 PM -07:00 -> -7
"zz"	Hours offset from UTC, with a leading zero for a single-digit value.	6/15/2009 1:45:30 PM -07:00 -> -07
"zzz"	Hours and minutes offset from UTC.	6/15/2009 1:45:30 PM -07:00 -> -07:00
":"	The time separator.	6/15/2009 1:45:30 PM -> : (en-US) 6/15/2009 1:45:30 PM -> . (it-IT) 6/15/2009 1:45:30 PM -> : (ja-JP)
"/"	The date separator.	6/15/2009 1:45:30 PM -> / (en-US) 6/15/2009 1:45:30 PM -> - (ar-DZ) 6/15/2009 1:45:30 PM -> . (tr-TR)
"string" **'string'**	Literal string delimiter.	6/15/2009 1:45:30 PM ("arr:" h:m t) -> arr: 1:45 P 6/15/2009 1:45:30 PM ('arr:' h:m t) -> arr: 1:45 P

%	Defines the following character as a custom format specifier.	6/15/2009 1:45:30 PM (%h) -> 1
****	The escape character.	6/15/2009 1:45:30 PM (h \h) -> 1 h
Any other character	The character is copied to the result string unchanged.	6/15/2009 1:45:30 AM (arr hh:mm t) -> arr 01:45 A

3.2.2 Number fields

This table provides you with an overview of all possible additional number field customizations. Please have a look at CHAPTER 5.28.2 HOW TO CREATE A CUSTOM 16-DIGITS NUMBER FIELD ON PAGE 191 in order learn how to create a custom number field.

Format specifier	Name	Description	Examples
"0"	Zero placeholder	Replaces the zero with the corresponding digit if one is present; otherwise, zero appears in the result string.	1234.5678 ("00000") -> 01235 0.45678 ("0.00", en-US) -> 0.46 0.45678 ("0.00", fr-FR) -> 0,46
"#"	Digit placeholder	Replaces the "#" symbol with the corresponding digit if one is present; otherwise, no digit appears in the result string. Note that no digit appears in the result string if the corresponding digit in the input string is a non-significant 0. For example, 0003 ("####") -> 3.	1234.5678 ("#####") -> 1235 0.45678 ("#.##", en-US) -> .46 0.45678 ("#.##", fr-FR) -> ,46
"."	Decimal point	Determines the location of the decimal separator in the result string.	0.45678 ("0.00", en-US) -> 0.46 0.45678 ("0.00", fr-FR) -> 0,46
","	Group separator and number scaling	Serves as both a group separator and a number scaling specifier. As a group separator, it inserts a localized group separator character between each group. As a number scaling specifier, it	Group separator specifier: 2147483647 ("##,#", en-US) -> 2,147,483,647 2147483647 ("##,#", es-ES) -> 2.147.483.647

	divides a number by 1000 for each comma specified.	Scaling specifier: 2147483647 ("#,#,,", en-US) -> 2,147 2147483647 ("#,#,,", es-ES) -> 2.147

3.2.3 Cultures

This table provides you with an overview of all possible culture customizations. These customizations are important if it comes to numbers, dates or currencies. Please have a look at chapter 5.28 How to modify Field Properties on page 190 in order to get an overview of when to use culture customizations.

Culture Name	Language-Country/Region
af	Afrikaans
af-ZA	Afrikaans - South Africa
sq	Albanian
sq-AL	Albanian - Albania
ar	Arabic
ar-DZ	Arabic - Algeria
ar-BH	Arabic - Bahrain
ar-EG	Arabic - Egypt
ar-IQ	Arabic - Iraq
ar-JO	Arabic - Jordan
ar-KW	Arabic - Kuwait
ar-LB	Arabic - Lebanon
ar-LY	Arabic - Libya

ar-MA	Arabic - Morocco
ar-OM	Arabic - Oman
ar-QA	Arabic - Qatar
ar-SA	Arabic - Saudi Arabia
ar-SY	Arabic - Syria
ar-TN	Arabic - Tunisia
ar-AE	Arabic - United Arab Emirates
ar-YE	Arabic - Yemen
hy	Armenian
hy-AM	Armenian - Armenia
az	Azeri
az-AZ-Cyrl	Azeri (Cyrillic) - Azerbaijan
az-AZ-Latn	Azeri (Latin) - Azerbaijan
eu	Basque
eu-ES	Basque - Basque
be	Belarusian
be-BY	Belarusian - Belarus
bg	Bulgarian
bg-BG	Bulgarian - Bulgaria
ca	Catalan

ca-ES	Catalan - Catalan
zh-HK	Chinese - Hong Kong SAR
zh-MO	Chinese - Macau SAR
zh-CN	Chinese - China
zh-CHS	Chinese (Simplified)
zh-SG	Chinese - Singapore
zh-TW	Chinese - Taiwan
zh-CHT	Chinese (Traditional)
hr	Croatian
hr-HR	Croatian - Croatia
cs	Czech
cs-CZ	Czech - Czech Republic
da	Danish
da-DK	Danish - Denmark
div	Dhivehi
div-MV	Dhivehi - Maldives
nl	Dutch
nl-BE	Dutch - Belgium
nl-NL	Dutch - The Netherlands
en	English

en-AU	English - Australia
en-BZ	English - Belize
en-CA	English - Canada
en-CB	English - Caribbean
en-IE	English - Ireland
en-JM	English - Jamaica
en-NZ	English - New Zealand
en-PH	English - Philippines
en-ZA	English - South Africa
en-TT	English - Trinidad and Tobago
en-GB	English - United Kingdom
en-US	English - United States
en-ZW	English - Zimbabwe
et	Estonian
et-EE	Estonian - Estonia
fo	Faroese
fo-FO	Faroese - Faroe Islands
fa	Farsi
fa-IR	Farsi - Iran
fi	Finnish

fi-FI	Finnish - Finland
fr	French
fr-BE	French - Belgium
fr-CA	French - Canada
fr-FR	French - France
fr-LU	French - Luxembourg
fr-MC	French - Monaco
fr-CH	French - Switzerland
gl	Galician
gl-ES	Galician - Galician
ka	Georgian
ka-GE	Georgian - Georgia
de	German
de-AT	German - Austria
de-DE	German - Germany
de-LI	German - Liechtenstein
de-LU	German - Luxembourg
de-CH	German - Switzerland
el	Greek
el-GR	Greek - Greece

gu	Gujarati
gu-IN	Gujarati - India
he	Hebrew
he-IL	Hebrew - Israel
hi	Hindi
hi-IN	Hindi - India
hu	Hungarian
hu-HU	Hungarian - Hungary
is	Icelandic
is-IS	Icelandic - Iceland
id	Indonesian
id-ID	Indonesian - Indonesia
it	Italian
it-IT	Italian - Italy
it-CH	Italian - Switzerland
ja	Japanese
ja-JP	Japanese - Japan
kn	Kannada
kn-IN	Kannada - India
kk	Kazakh

kk-KZ	Kazakh - Kazakhstan
kok	Konkani
kok-IN	Konkani - India
ko	Korean
ko-KR	Korean - Korea
ky	Kyrgyz
ky-KZ	Kyrgyz - Kazakhstan
lv	Latvian
lv-LV	Latvian - Latvia
lt	Lithuanian
lt-LT	Lithuanian - Lithuania
mk	Macedonian
mk-MK	Macedonian - FYROM
ms	Malay
ms-BN	Malay - Brunei
ms-MY	Malay - Malaysia
mr	Marathi
mr-IN	Marathi - India
mn	Mongolian
mn-MN	Mongolian - Mongolia

no	Norwegian
nb-NO	Norwegian (Bokml) - Norway
nn-NO	Norwegian (Nynorsk) - Norway
pl	Polish
pl-PL	Polish - Poland
pt	Portuguese
pt-BR	Portuguese - Brazil
pt-PT	Portuguese - Portugal
pa	Punjabi
pa-IN	Punjabi - India
ro	Romanian
ro-RO	Romanian - Romania
ru	Russian
ru-RU	Russian - Russia
sa	Sanskrit
sa-IN	Sanskrit - India
sr-SP-Cyrl	Serbian (Cyrillic) - Serbia
sr-SP-Latn	Serbian (Latin) - Serbia
sk	Slovak
sk-SK	Slovak - Slovakia

sl	Slovenian
sl-SI	Slovenian - Slovenia
es	Spanish
es-AR	Spanish - Argentina
es-BO	Spanish - Bolivia
es-CL	Spanish - Chile
es-CO	Spanish - Colombia
es-CR	Spanish - Costa Rica
es-DO	Spanish - Dominican Republic
es-EC	Spanish - Ecuador
es-SV	Spanish - El Salvador
es-GT	Spanish - Guatemala
es-HN	Spanish - Honduras
es-MX	Spanish - Mexico
es-NI	Spanish - Nicaragua
es-PA	Spanish - Panama
es-PY	Spanish - Paraguay
es-PE	Spanish - Peru
es-PR	Spanish - Puerto Rico
es-ES	Spanish - Spain

es-UY	Spanish - Uruguay
es-VE	Spanish - Venezuela
sw	Swahili
sw-KE	Swahili - Kenya
sv	Swedish
sv-FI	Swedish - Finland
sv-SE	Swedish - Sweden
syr	Syriac
syr-SY	Syriac - Syria
ta	Tamil
ta-IN	Tamil - India
tt	Tatar
tt-RU	Tatar - Russia
te	Telugu
te-IN	Telugu - India
th	Thai
th-TH	Thai - Thailand
tr	Turkish
tr-TR	Turkish - Turkey
uk	Ukrainian

uk-UA	Ukrainian - Ukraine
ur	Urdu
ur-PK	Urdu - Pakistan
uz	Uzbek
uz-UZ-Cyrl	Uzbek (Cyrillic) - Uzbekistan
uz-UZ-Latn	Uzbek (Latin) - Uzbekistan
vi	Vietnamese
vi-VN	Vietnamese - Vietnam

4 Available demo templates

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

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

Quote QR Template	How to use the QR-Code-Field with the Quote entity.	You should at least have one quote, some products, and some prices.
Invoice Base	Simple invoice template just with fields from the invoice entity.	The sample data
Invoice with grouping base	Simple invoice template.	The sample data.
Newsletter to all accounts of this marketing list	Generates a document for each account in a marketing list.	You should have a marketing list with at least one account.
Opportunity Base	A simple sample template for an opportunity letter.	The sample data.

Figure 96: Table - List of demo templates

5 Tutorials ("How To's")

Please find a list of all available "How-To's" that are described in this document.

5.1 How to create DocumentsCorePack templates

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

This chapter contains a step-by-step description of how to create a template. We decided to create a so-called "quote-with-grouping-template" because it is most likely used by Microsoft Dynamics CRM/Dynamics 365 users ("Quote-with-grouping" means that the quote-products are grouped by the value of a specific CRM-attribute, e.g. subject.).

5.1.1 Step 1. Create a template layout by selecting an entity.

First, we need to create the basic layout of the template. Clicking on the ***[Insert MailMerge Fields]*** menu button in the www.mscrm-addons.com command bar will open the DocumentsCorePack Template Designer. Please see CHAPTER 1.2 HOW TO OPEN THE DOCUMENTSCOREPACK TEMPLATE DESIGNER ON PAGE 9 for details.

Anyway, to create the basic layout for, e.g. a quote-with-grouping-template, we must select the type "Quote" in the Type-Selector-Dropdown Menu. Each template is based on a specific entity.

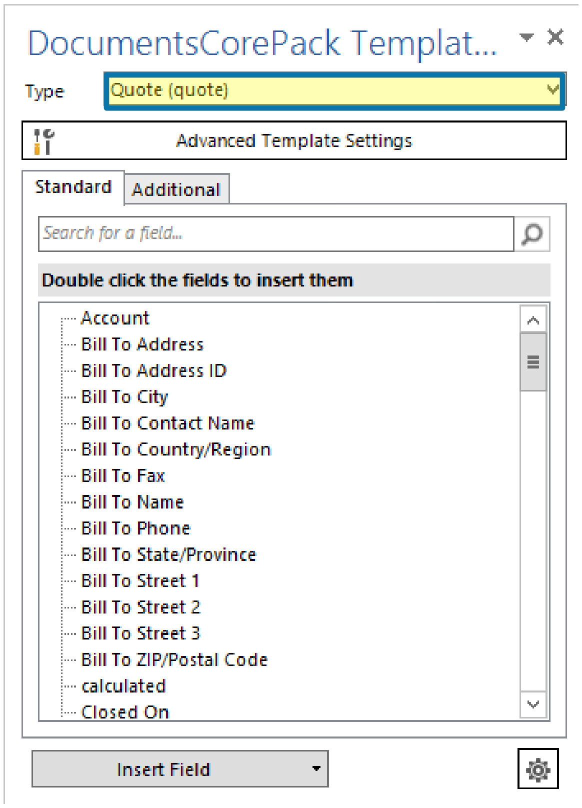


Figure 97: Template Designer – Selected entity: Quote

5.1.2 Step 2: Insert Fields

Now that we have selected an entity, we need to insert fields into our template. To do so, we set the cursor at the position where we would like to insert a certain entity. Then, we double-click the field. You could as well insert a field via the ***[Insert field]***-button. (SEE CHAPTER 1.9 INSERT FIELD BUTTON, PAGE 46)

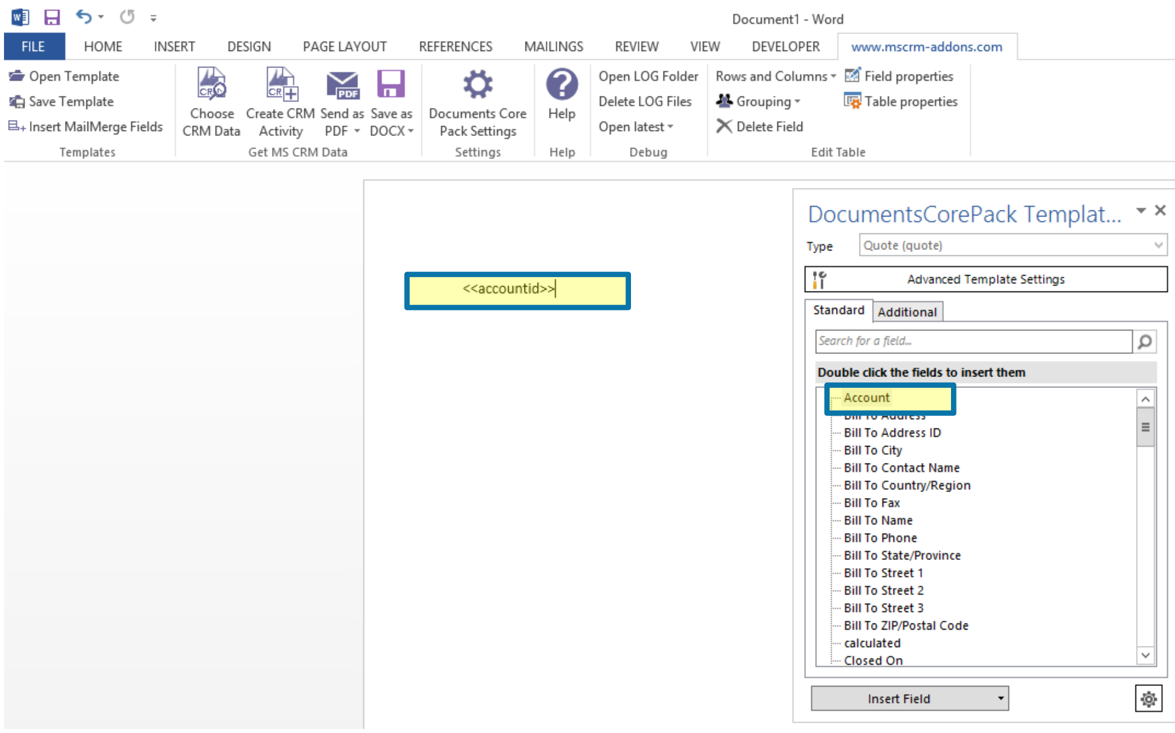
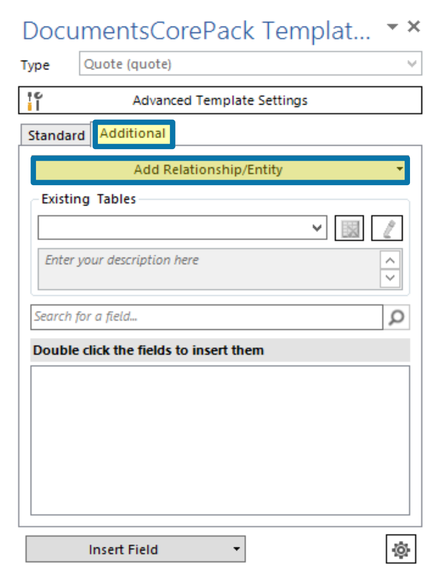


Figure 98: Template Designer – Insert fields

Once you have inserted all the fields you would like to insert, your template could look like this:

5.1.3 Step 3: Add line-item relationship

The next step is to resolve the quote-quote product relationship. To do so, we need to click on the [Additional]-tab in the DocumentsCorePack Template Designer. 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.



Here, we click on the ***[Add Relationship/Entity]***-button in order to add a new relationship. Learn more about how to add relationships and entities in CHAPTER 1.7.1 ADD RELATIONSHIPS/ENTITY ON PAGE 40.

Figure 99: Template Designer Additional tab

We use the *Configure fields and data source* – dialog to resolve the fields, tables, and relationships we need for our document. Please find further information on how to configure additional fields and relationships in CHAPTER 1.8 ADDITIONAL RELATIONSHIPS PAGE 42.

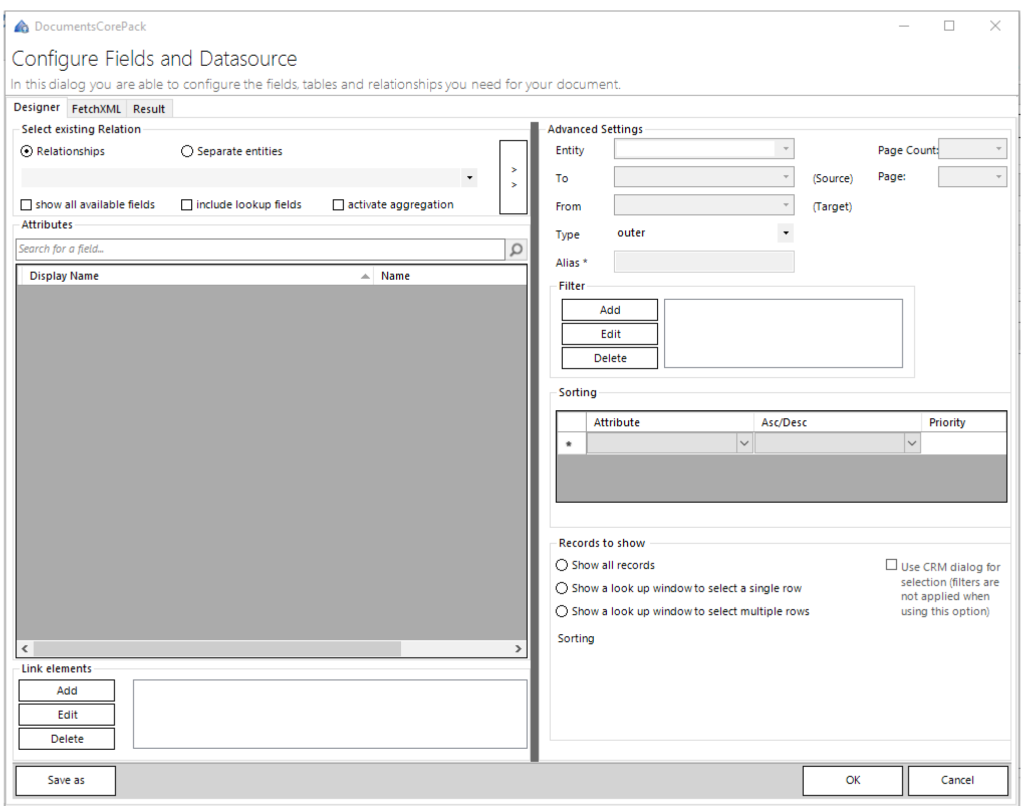


Figure 100: Configure fields and data source dialog

For our example, we decided to select *Quote -> Quote Product [quoteid]*. As a result, the available fields of this relationship are displayed in the *Attributes* field of the *Configure fields and data source dialog*. As soon as we click on the [OK]-button, all the selected fields will be related to the Quote Product table.

Only the fields checked in the Attributes field will later be visible in the DocumentsCorePack Template Designer.

5.1.4 Step 3: Insert the table

The procedure of inserting a table of items is completely automated, so we just need to set the cursor to the position where we want to add the table and double click on one of the fields that we have previously added to the table. As soon as we do so, the following dialog appears:

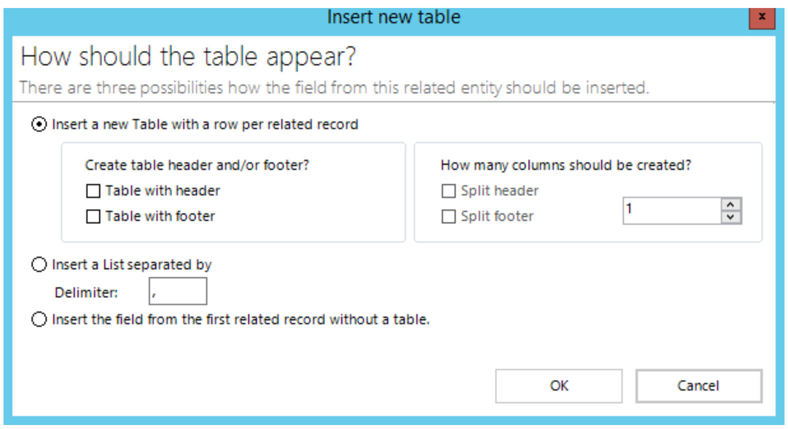


Figure 101: Insert new table

Within this dialog, you can select between three possibilities how the fields should be inserted into the table. In our example, we decided to insert a new table with a header and a footer and clicked on ***[OK]***.
As a result, the table will be inserted at the determined position:

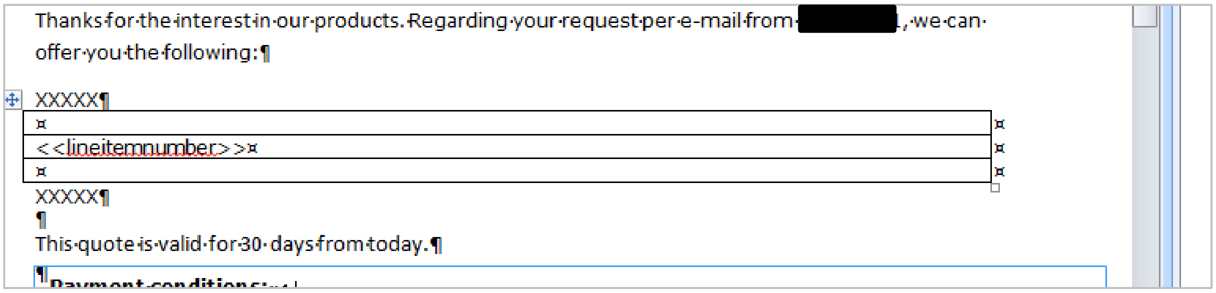


Figure 102: Insert table (Result)

5.1.5 Step 4 Format the table

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

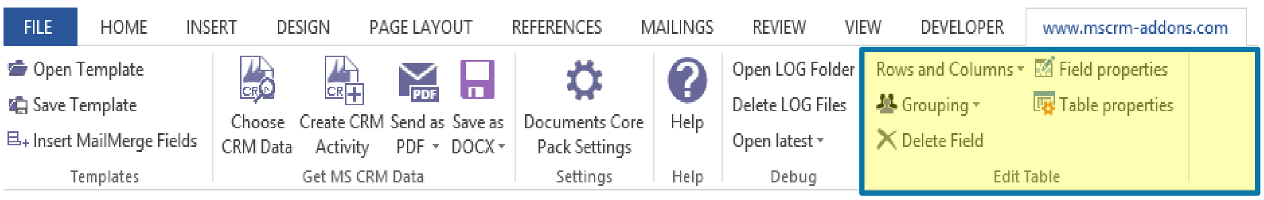
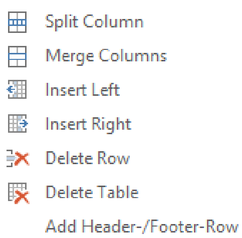


Figure 103: mscrm-addons.com tab – Rows and Columns



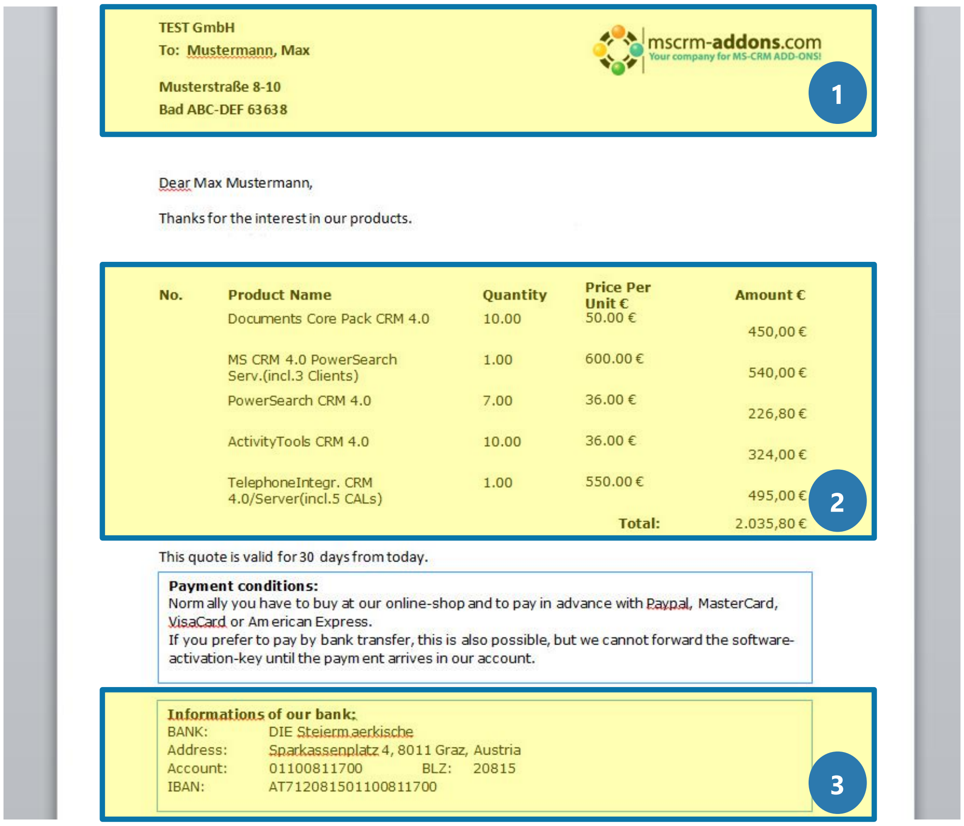
With a click on the *Rows and Columns* – Dropdown, you get the possibility to split or merge the columns, to insert a right or left column, to delete a row or a table and to add a header or a footer row. For further information on how to configure field properties, please have a look at CHAPTER 1.10 FIELD PROPERTIES PAGE 61.

Figure 104: column customization

It is of utmost importance to insert the header, as well as the footer, exclusively via the www.mscrm-addons.com – tab in the command bar!
Do not enter them via Microsoft Word!

5.1.6 Step 5 Get the result!

After saving the document and selecting our 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.



TEST GmbH
To: Mustermann, Max

Musterstraße 8-10
Bad ABC-DEF 63638

mscrm-addons.com
Your company for MS-CRM ADD-ONS!

Dear Max Mustermann,

Thanks for the interest in our products.

No.	Product Name	Quantity	Price Per Unit €	Amount €
	Documents Core Pack CRM 4.0	10.00	50.00 €	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 €

This quote is valid for 30 days from today.

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

Informations of our bank:
BANK: DIE Steierm aerkische
Address: Sparkassenplatz 4, 8011 Graz, Austria
Account: 01100811700 BLZ: 20815
IBAN: AT712081501100811700

Figure 105: DocumentsCorePack Template - Result

5.2 How to create a Master Template

The *Master Template* feature allows you to manage the design of documents header and footer in a separate template. When the design changes you can modify one template instead of each template. In your actual templates you just have set the *Master Template* which should be applied when the document is merged. This feature requires at least version 9.27 of the client and version 2017.193 of the server or service.

Example: The left example shows the document which is to edit and on the right side the created document contains the companies design in the header and footer.

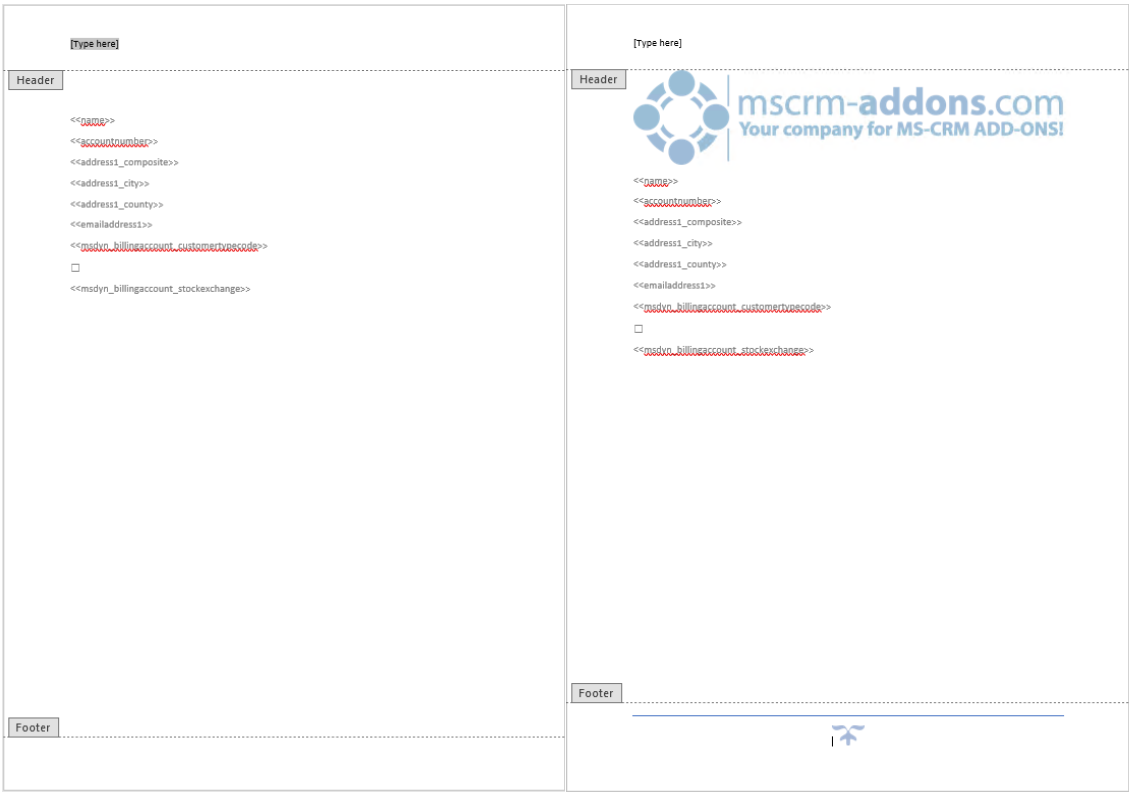


Figure 106: Example

5.2.1 How to set up a Master Template for your company

The next few steps describe the process how to set up a *Master Template* customized for your company.

a) Open a plain document
b) Edit the header and footer according to the design of your company

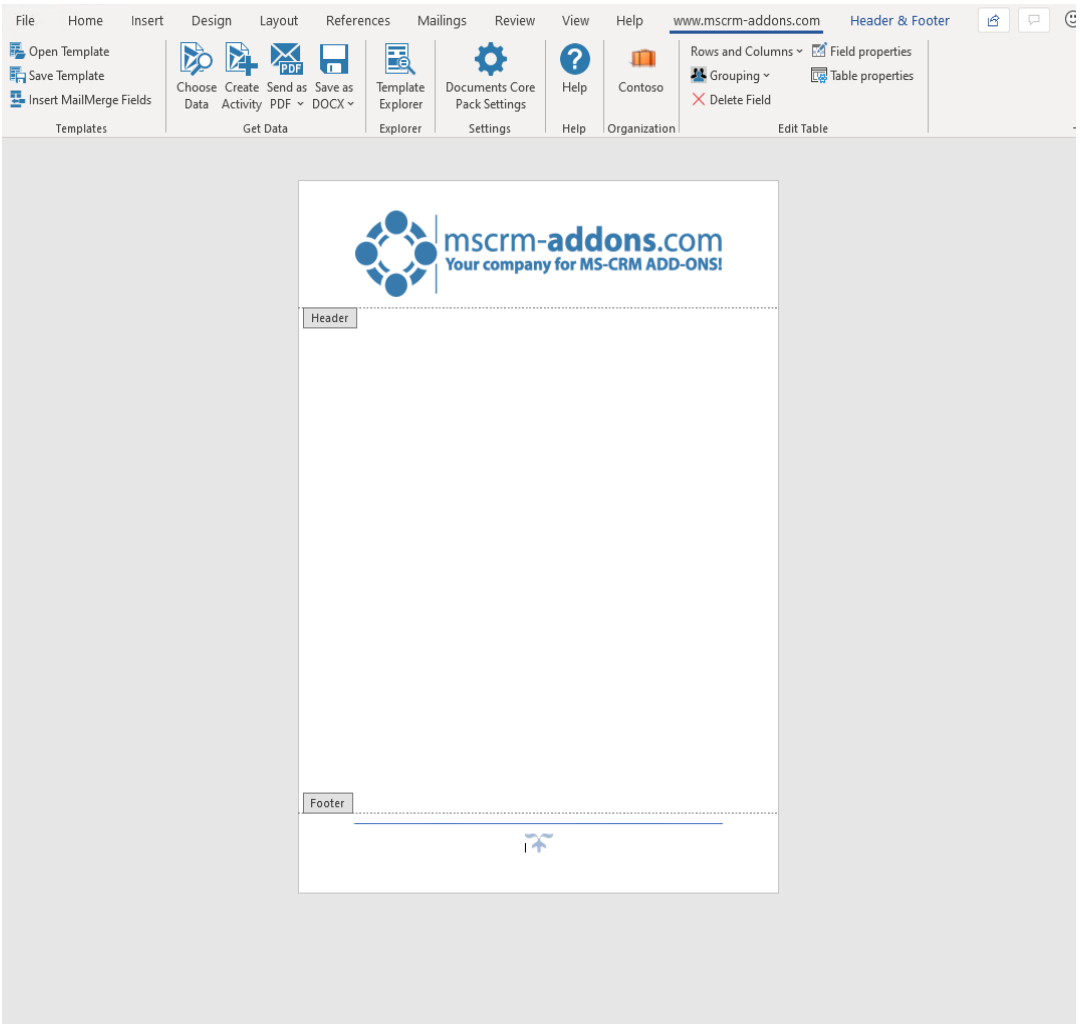


Figure 107: Header and Footer edited

c) Save the document by using the *Save template*-option as a static template in your Dynamics 365.

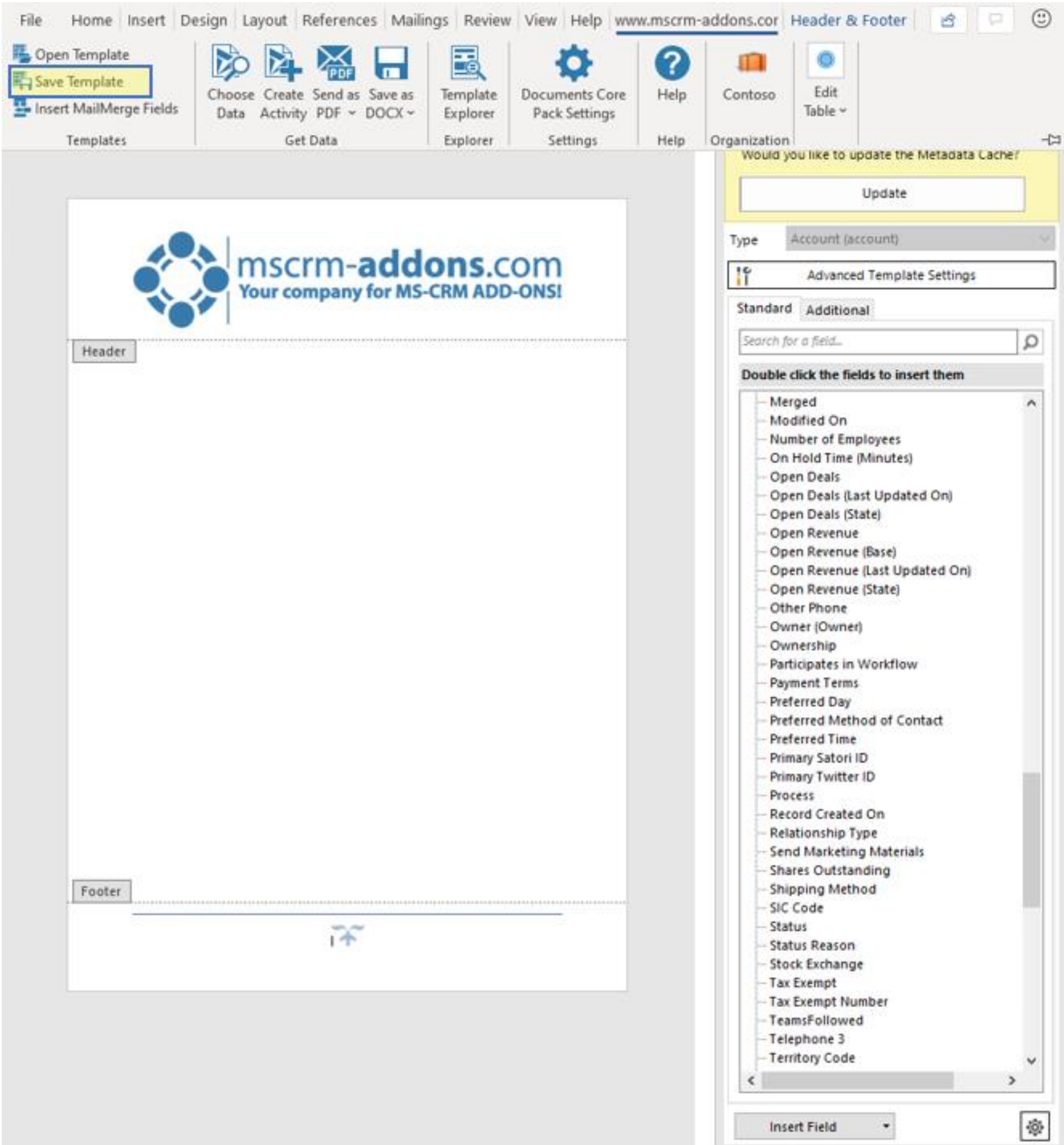


Figure 108: Save Template Option

d) This window is shown while saving the template. Please confirm.

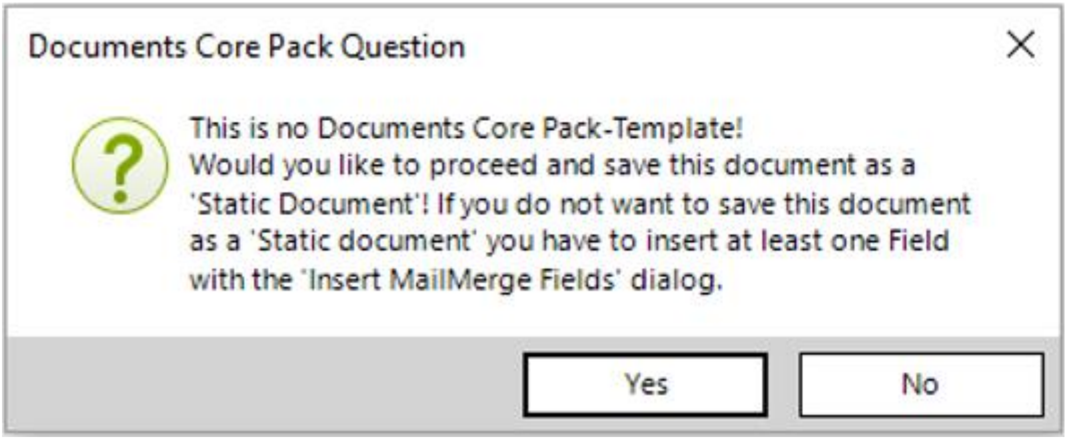


Figure 109: Save as a Static Document

5.2.2 Assign the Master Template to your normal templates

a) Open the template settings and go to the Master template settings on the General tab.

If you are not sure how to get to access to the template settings to set the document subject please have a look at this article first.

b) There are 2 settings in the *Master Template* group:

1. TO DEFINE WHICH *MASTER TEMPLATE* SHOULD BE APPLIED FOR ALL HEADER AND FOOTER IN THE DOCUMENT
2. IT IS AN OPTIONAL SETTING FOR A *MASTER TEMPLATE* FOR THE FOOTER

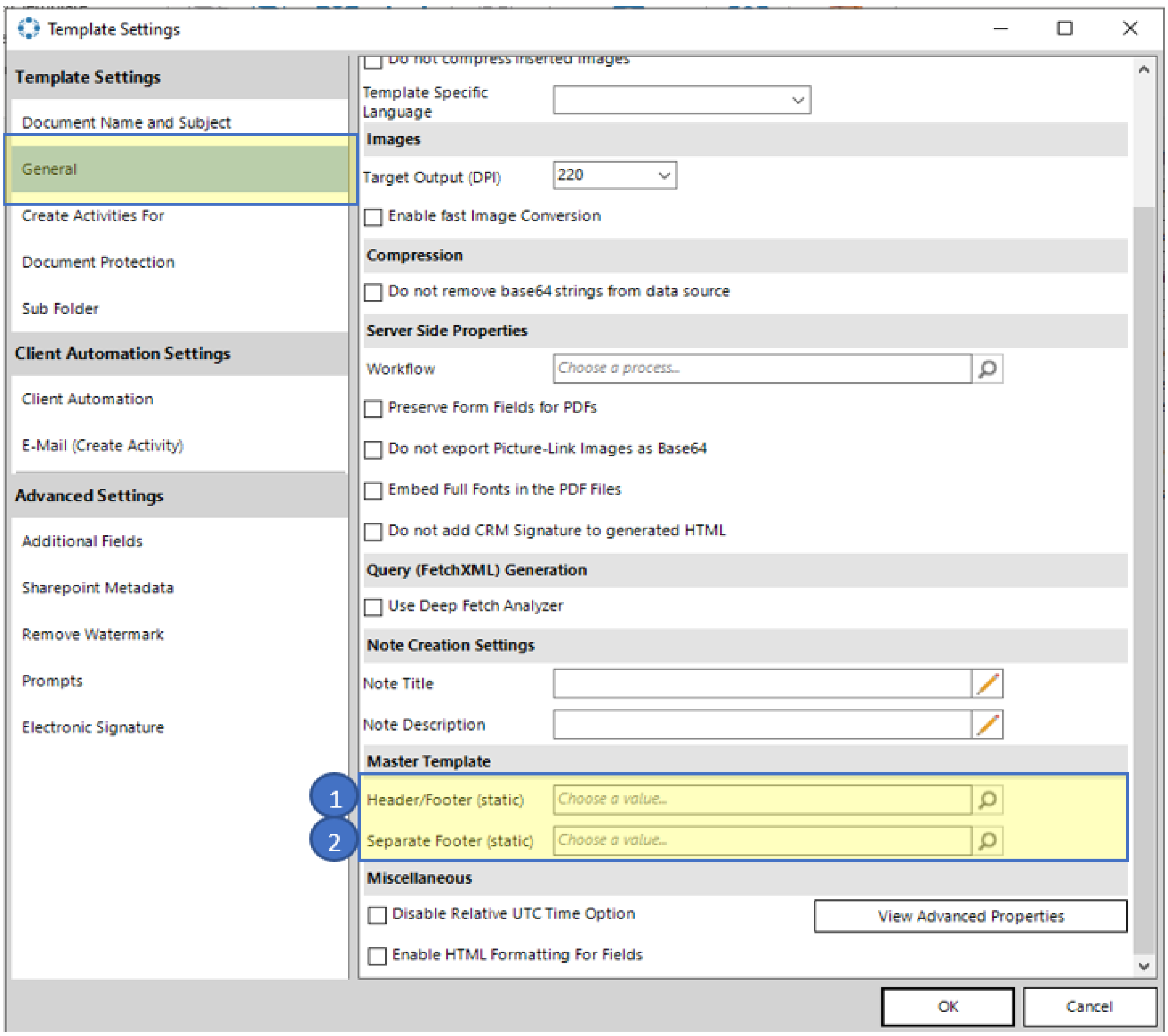


Figure 110: Settings in the Master Template

c) To assign a Master Template you can type in the "*Header/Footer (static)*"–search bar the name of the Master Template you prepared

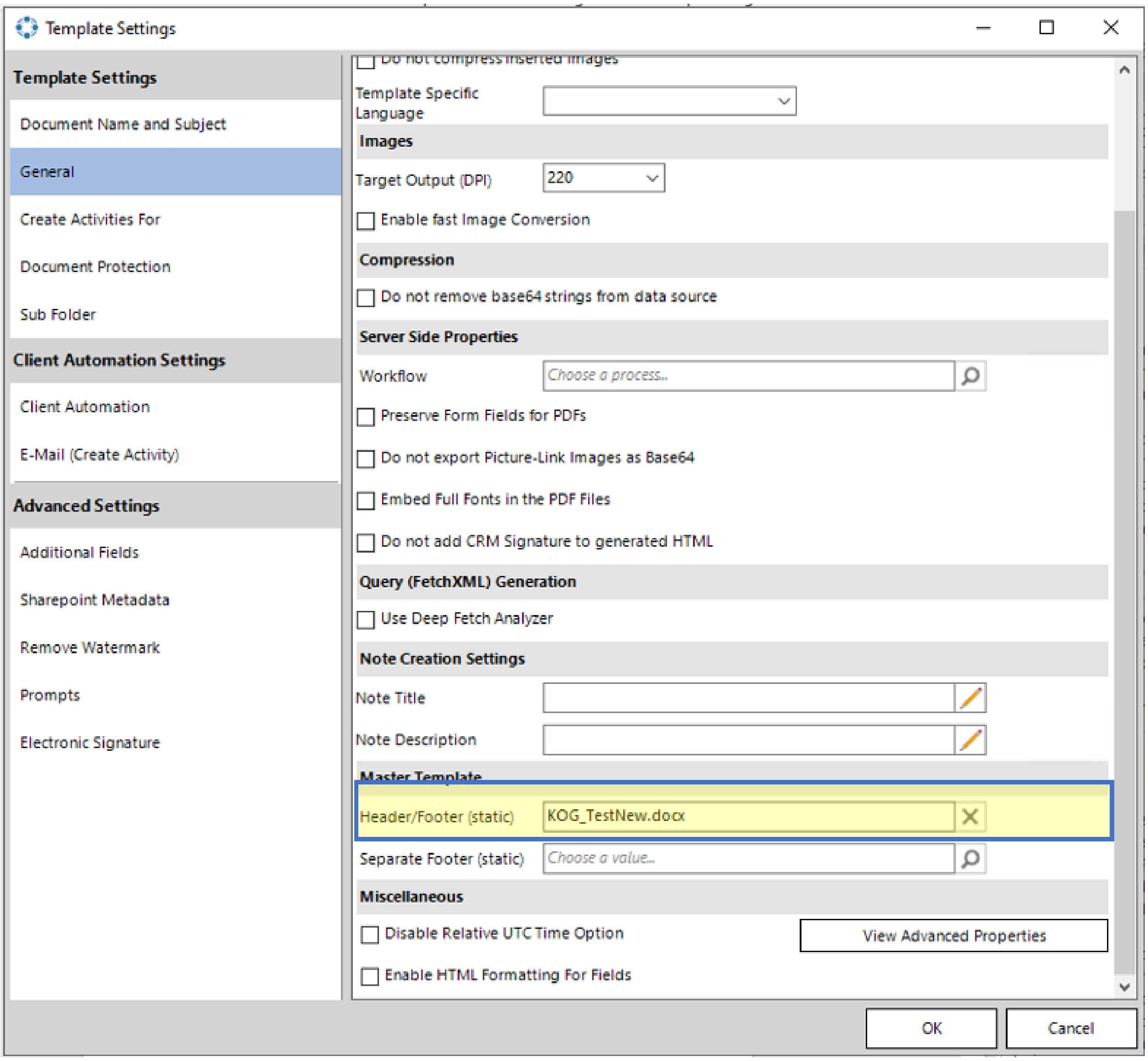


Figure 111: Type in the prepared Master Template

e) or click on the magnifier-button to open the “Look Up Record” where you can also choose your prepared *Master Template*.

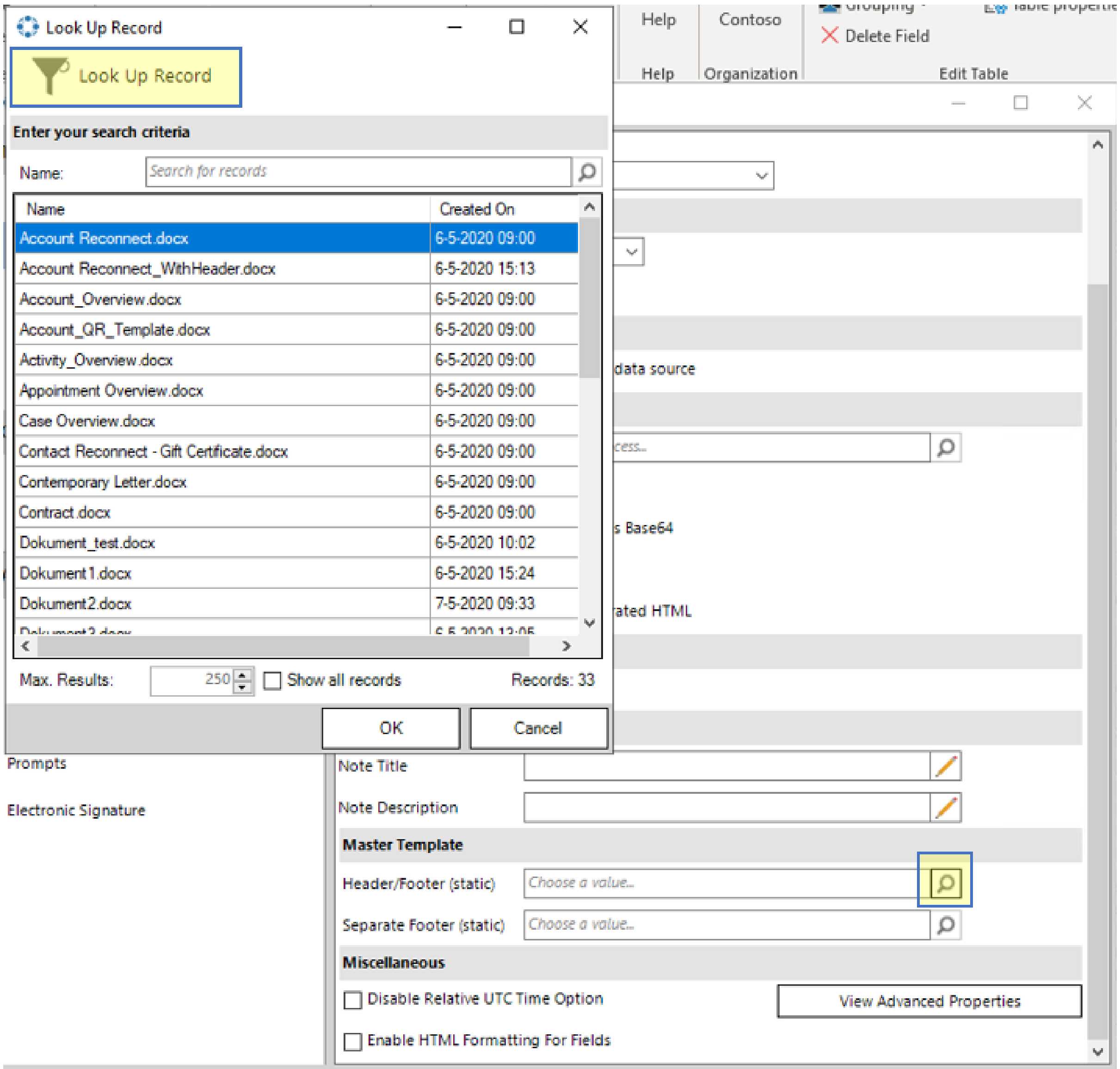


Figure 112: Look Up Record

5.2.3 Save the Template

Before use or test the defined *Master Template* it is necessary to save it:

a) Locally with the standard "Save"
b) "Save as" – functionality of Microsoft Word
c) "Save Template" – option of the DocumentsCorePack client in order to publish the template to Dynamics 365

- Design also the first page and even/odd header/footers in the *Master Template* otherwise those sections will be blank in the result document.
- The size of the header/footer in the *Master Template* should not be bigger than the page margin of the main template. Otherwise it will shrink the document body size in the output document. There is no setting to limit the size of the header/footers.
- Format styles of the *Master Template* are not merged into the main template. Text formatting made in the *Master Template* without the use of format styles will be displayed correctly. If you like to work with format styles in the *Master Template,* please make sure that they exist in each template.

That is how you create a DocumentsCorePack Template! In the course of the next chapter, you will learn how to test your template!

5.3 How to test your template

So, you have successfully created or modified a template and now you would like to give it a try. With our Step-by-Step instruction on how to do so in DocumentsCorePack Client, this is a piece of cake.

5.3.1 Step 1: Open your Template

Ensure yourself that you have opened your template in Word by using the ***[Open Template]***-button. If the template is not opened in Word or if the template is not a DocumentsCorePack template the following steps will most likely not work.

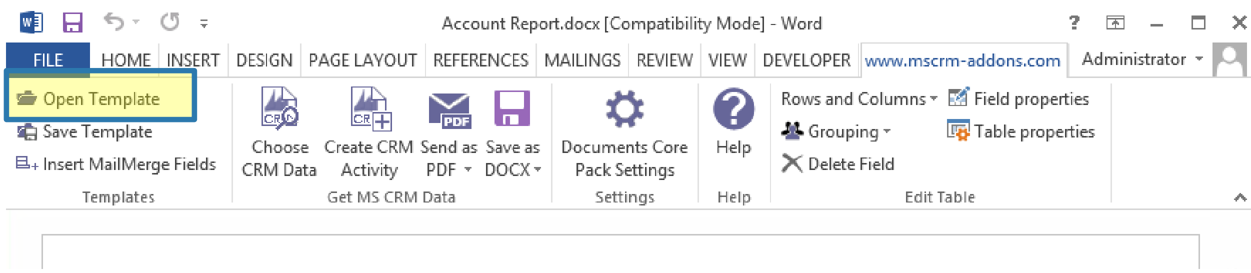


Figure 113: www.mscrm-addons.com tab - Open Template:

5.3.2 Step 2: Choose CRM Data

Press ***[Choose CRM Data]*** in the www.mscrm-addons.com tab.

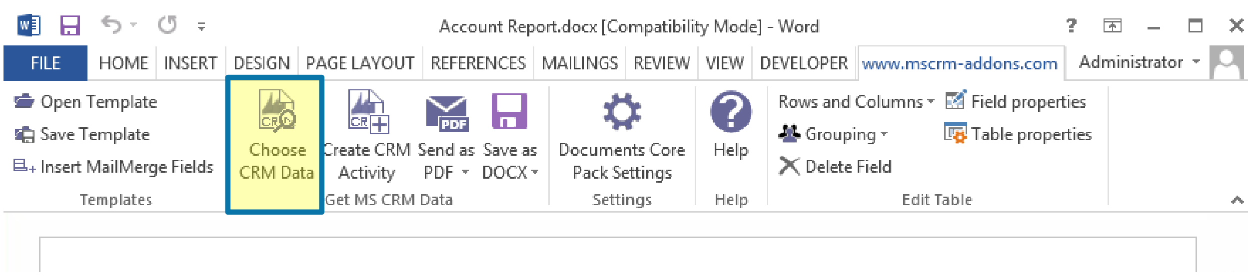


Figure 114: www.mscrm-addons.com tab - Choose CRM Data

5.3.3 Step 3: Search and Select a CRM record

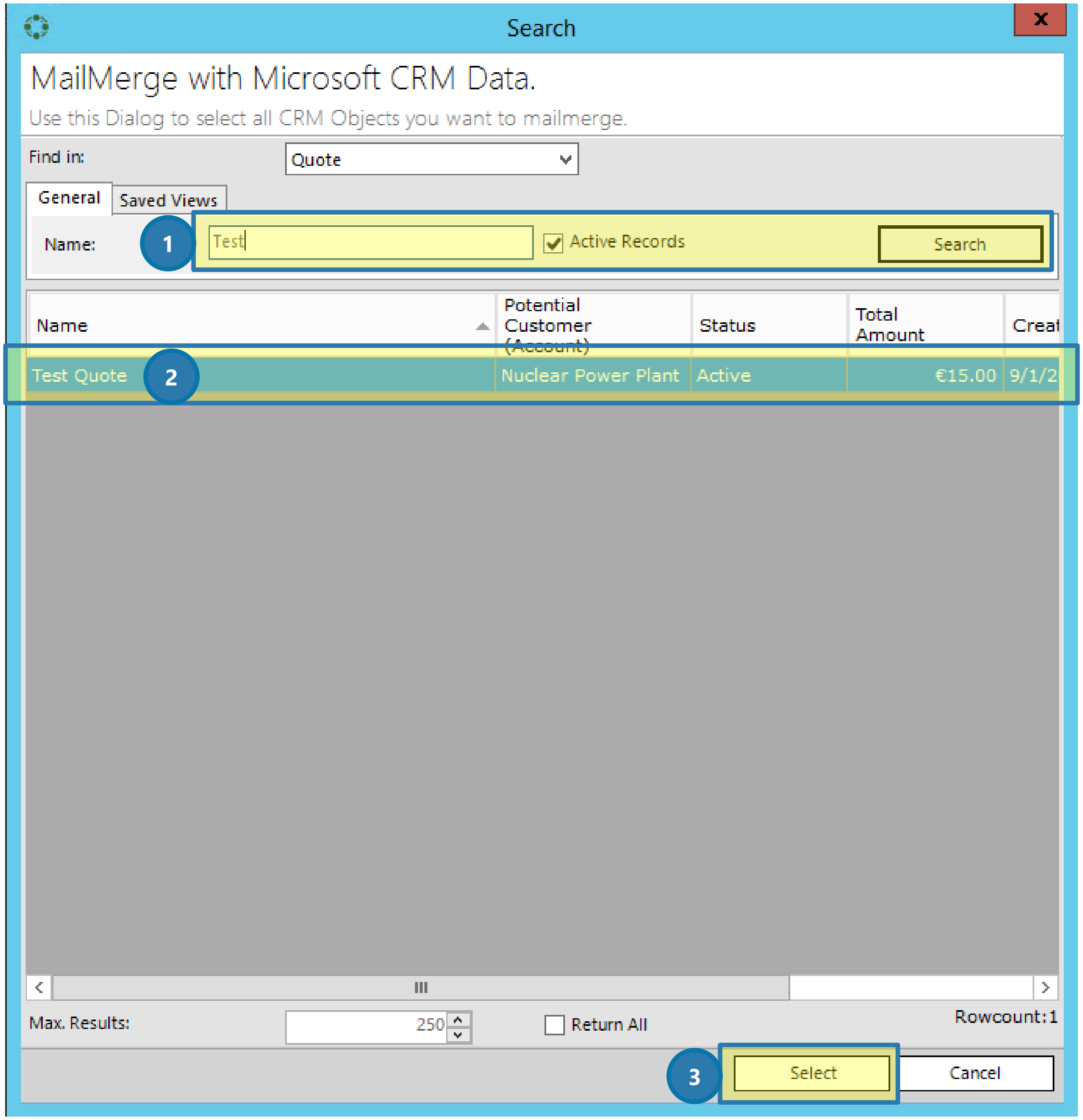


Figure 115: Choose CRM Data dialog with data

Enter a search term corresponding to the template you have created previously and hit the ***[Search]***-button (1). Select one of the records from the result windows 2 and press ***[Select]*** 3.

5.3.4 Step 4: Check your document

Now check your template and verify if your modification and design are as expected. Please be aware that some special settings may NOT take effect at this point! To ensure that everything works like expected, please also use the template in one complete work process.

5.4 How to pre filter result rows before generating a document

This functionality is helpful when the user needs to select a specific related entity (for example, “contact”) before starting to generate the document.

5.4.1 Open the *Configure Fields and Datasource* dialog

In order to do so, you have to open the additional tab, select a relationship and click on the ***[Edit]***-button. If have not worked with the additional tab yet, please SEE CHAPTER 1.7 ADDITIONAL-TAB, PAGE 39.

In the so opened *Configure Fields and Datasource* dialog (FOR MORE DETAILED INFORMATION SEE CHAPTER 1.8 ADDITIONAL RELATIONSHIPS, PAGE 42), go to the *Records to Show*-section.

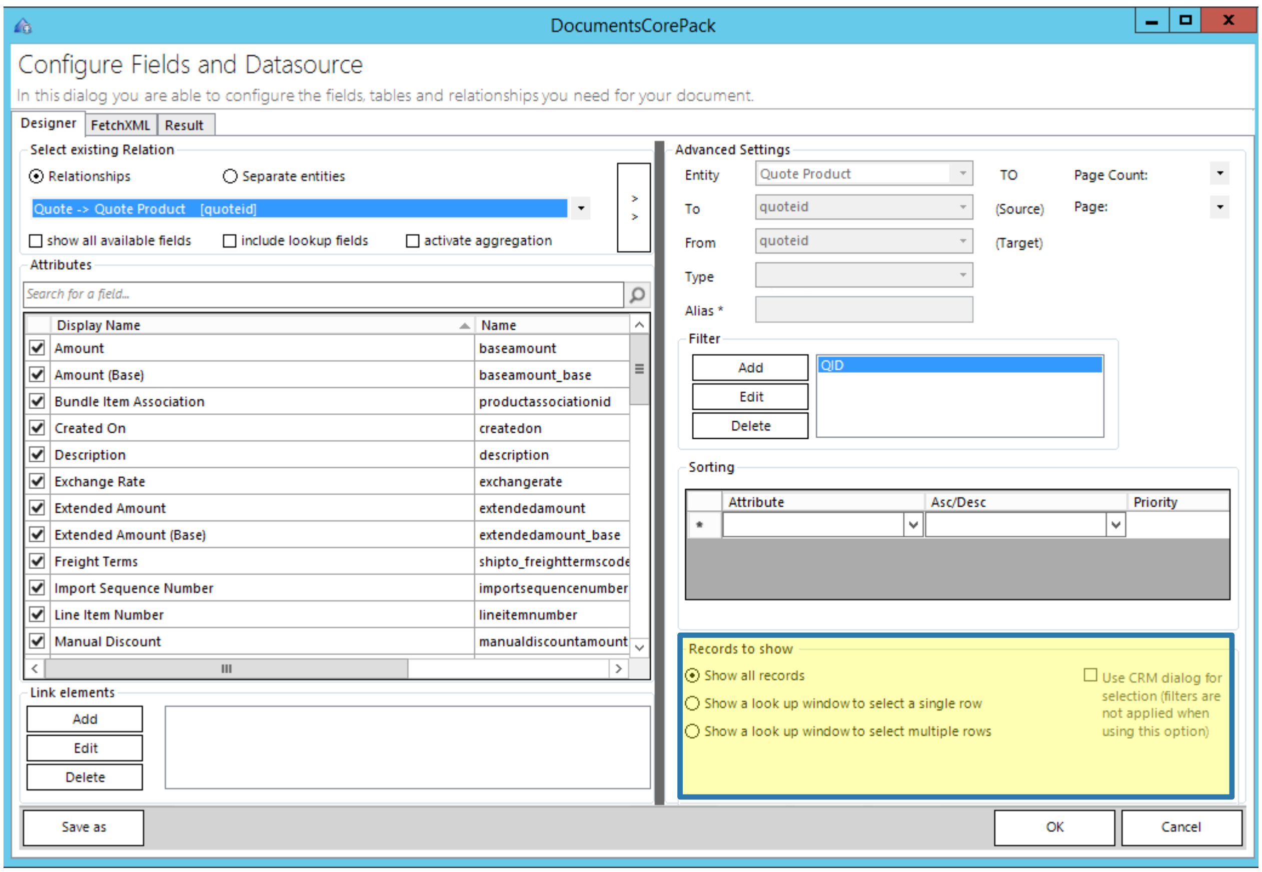


Figure 116: Configure fields and datasource-dialog – Records to show (default settings)

5.4.2 How to pre-filter rows in the *Records to show* – section

The *Records to show* – section you can choose if you want a selection and if so, which type. You can choose between single or multiple rows. The "Width(px)"-section enables you to determine the order and the width of the columns in pixel within the lookup window.

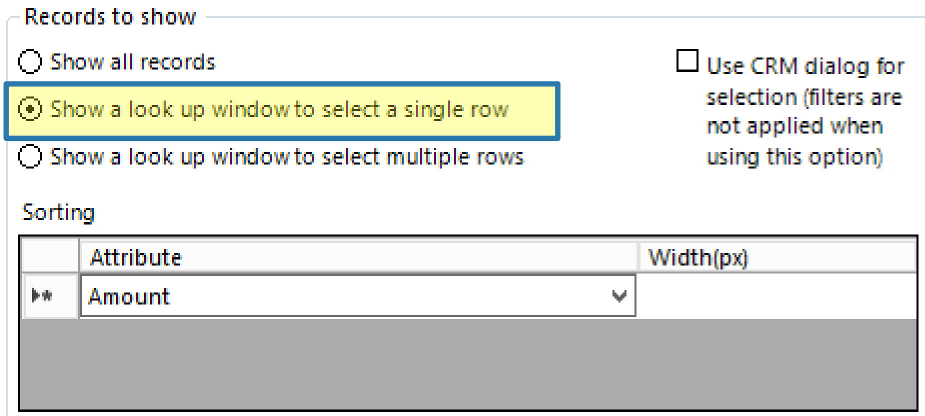


Figure 117: Records to show – Show a look up window to select a single row

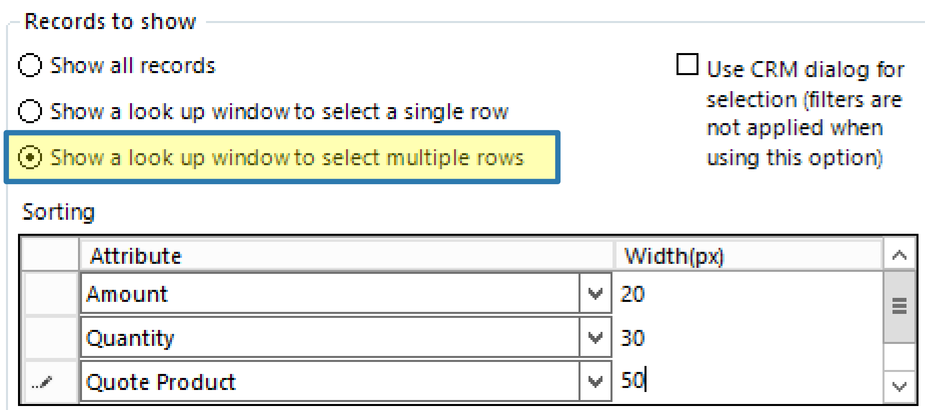


Figure 118: Records to show – Show a look up window to select multiple rows incl. width(px)-settings

5.5 How to create label templates

This "How to" describes how to create label templates with DocumentsCorePack Template Designer. Basically, there are two options for how a label template can be created and merged:

A) By choosing various records at once
(in this case, each label equals one record form the main entity of the template)

B) By choosing one record and then, setting relations to other records
(in this case, each label equals one record from the predefined relationship)

This "How to" shows how to retrieve fields for version A), as well as for version B).

5.5.1 How to create label templates choosing various records at once

In order to prepare for a new template, you have to open the Template Settings, then go to the *General*-section, check *Mark as label template* and click on the ***[OK]***-button. (SEE CHAPTER 1.5 ADVANCED TEMPLATES SETTINGS, PAGE 21 FOR MORE INFORMATION ON THE GENERAL TEMPLATE SETTING). You will see, that now there is a new block in the *www.mscrm-addons.com* – tab of the command bar.

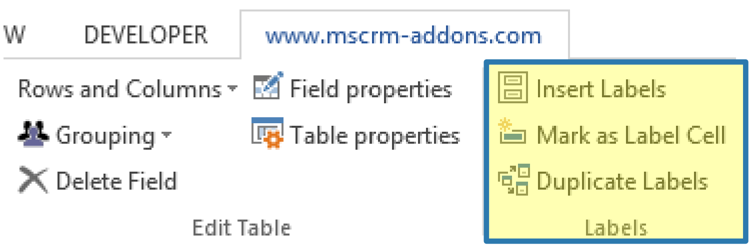


Figure 119: New "label block" in the www.mscrm-addons.com - tab.

5.5.2 Click on the ***[Insert Labels]*** – button

Within the window that opens now, you can customize the label options for your future template.

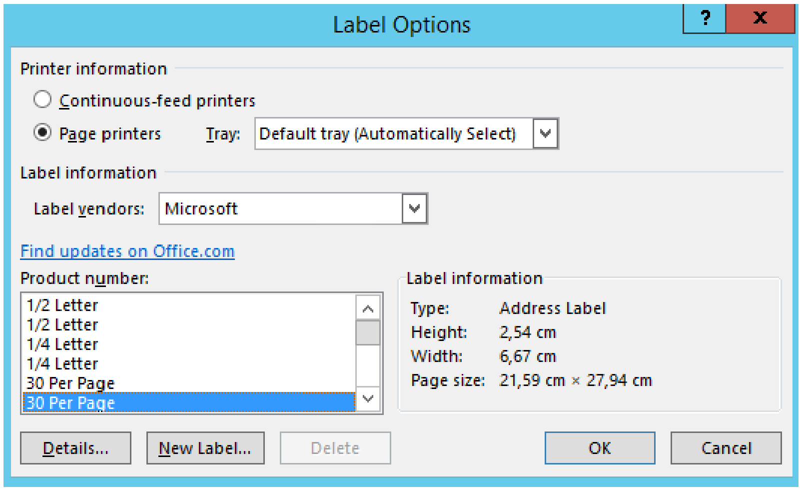


Figure 120: Label Options dialog

You can select between various trays, label vendors, and the corresponding product numbers. In the label information section on the right side, you get additional information on the selected label. Select your desired label and click on the ***[OK]***-button.

5.5.3 Mark the first cell as label cell

Once the label is inserted in your document you have to mark the first cell as label cell. To do so, simply set the cursor in the first cell and click on the ***[Mark as Label Cell]***-button in the www.mscrm-addons.com – tab.

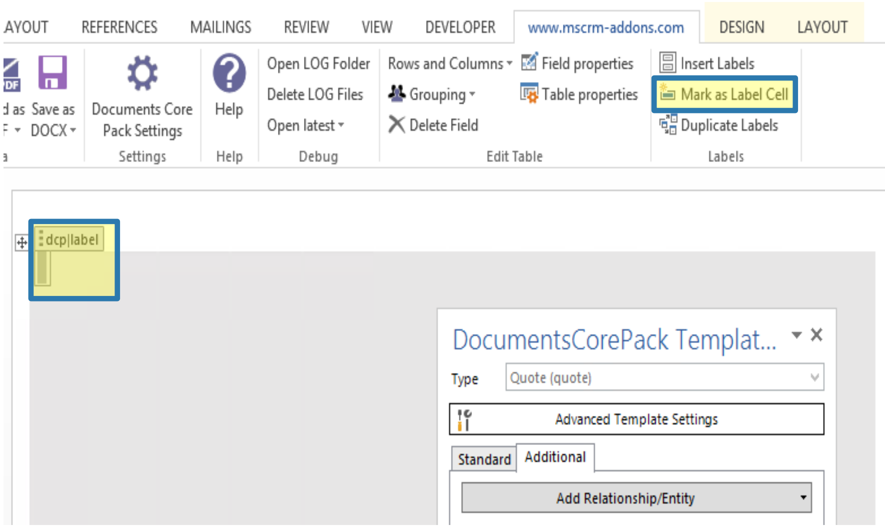


Figure 121: Mark cell as label cell (Please note that the cell is enlarged due to demonstration purpose)

5.5.4 Retrieve fields (version A): Select a start entity

Once the cell is marked as Label cell you must select a start entity (for example "Quote" and insert the appropriate fields. Once you have finished, please proceed with CHAPTER 5.5.6, PAGE 123.

Make sure that you use the *Standard-tab* only to insert the corresponding entities.

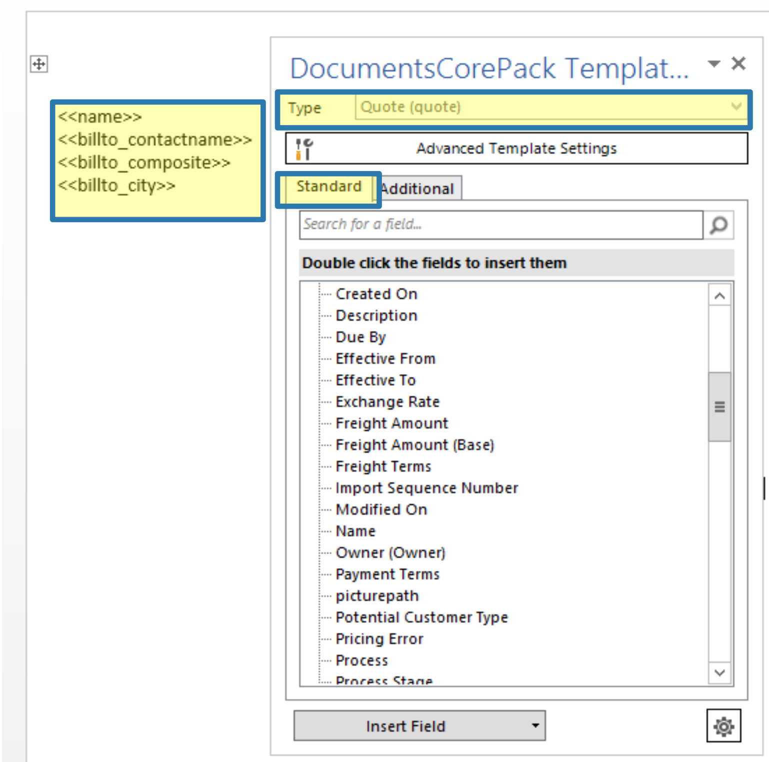


Figure 123: Mark cell as label cell
(Notice that the cell is enlarged due to demonstration purpose)

5.5.5 Retrieve fields (version B): Create one record and set relations to other records

Once the cell is marked as Label cell you must build up a relation for your entity.

When working with version B it is crucial to insert the fields via the *Additional-tab* of the Template Designer. Once you have finished, please proceed with CHAPTER 5.5.6, PAGE 123.

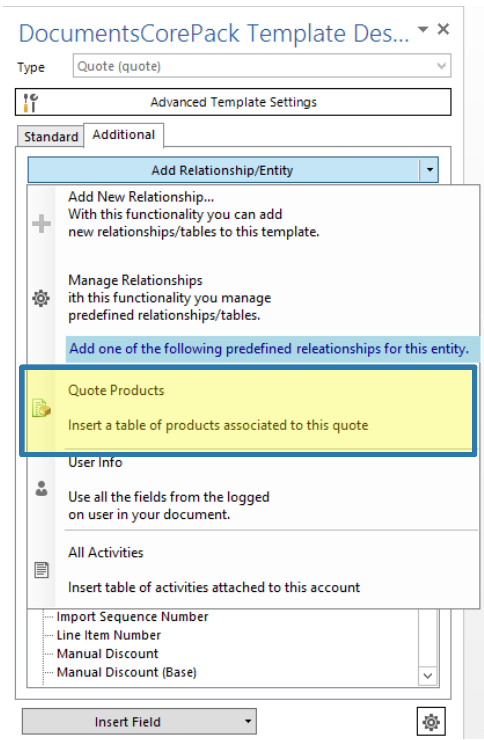


Figure 124: Additional tab: Add relationship/entity

To set a relation, simply open the Add Relationship/Entity drop-down menu and select the relation you would like to insert (for example Quote Products). For further information on how to set a relation and how to add new relationships/entities, please SEE CHAPTER 1.7.1 ADD RELATIONSHIPS/ENTITY, PAGE 40.

Now the relation is set, and you can, as well, select the fields from the corresponding table that has been created.

5.5.6 Define the remaining cells as label cells as well

Now you need to define the remaining cells as label cells as well. To do so, place your cursor in the first cell and click on the ***[Duplicate Labels]***-button in the *www.mscrm-addons.com* – tab. The following dialog appears. Please click on the ***[Yes]***-button to continue:

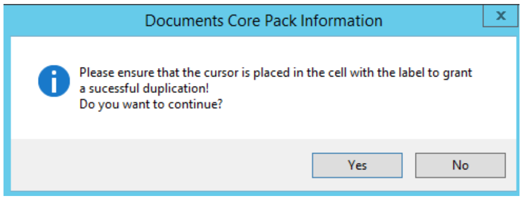


Figure 125: DocumentsCorePack Information dialog

Well done! Now, this is how a possible result could look like. Please do not forget to Save your template by clicking on the ***[Save template]***-button in the *www.mscrm-addons.com* command bar.

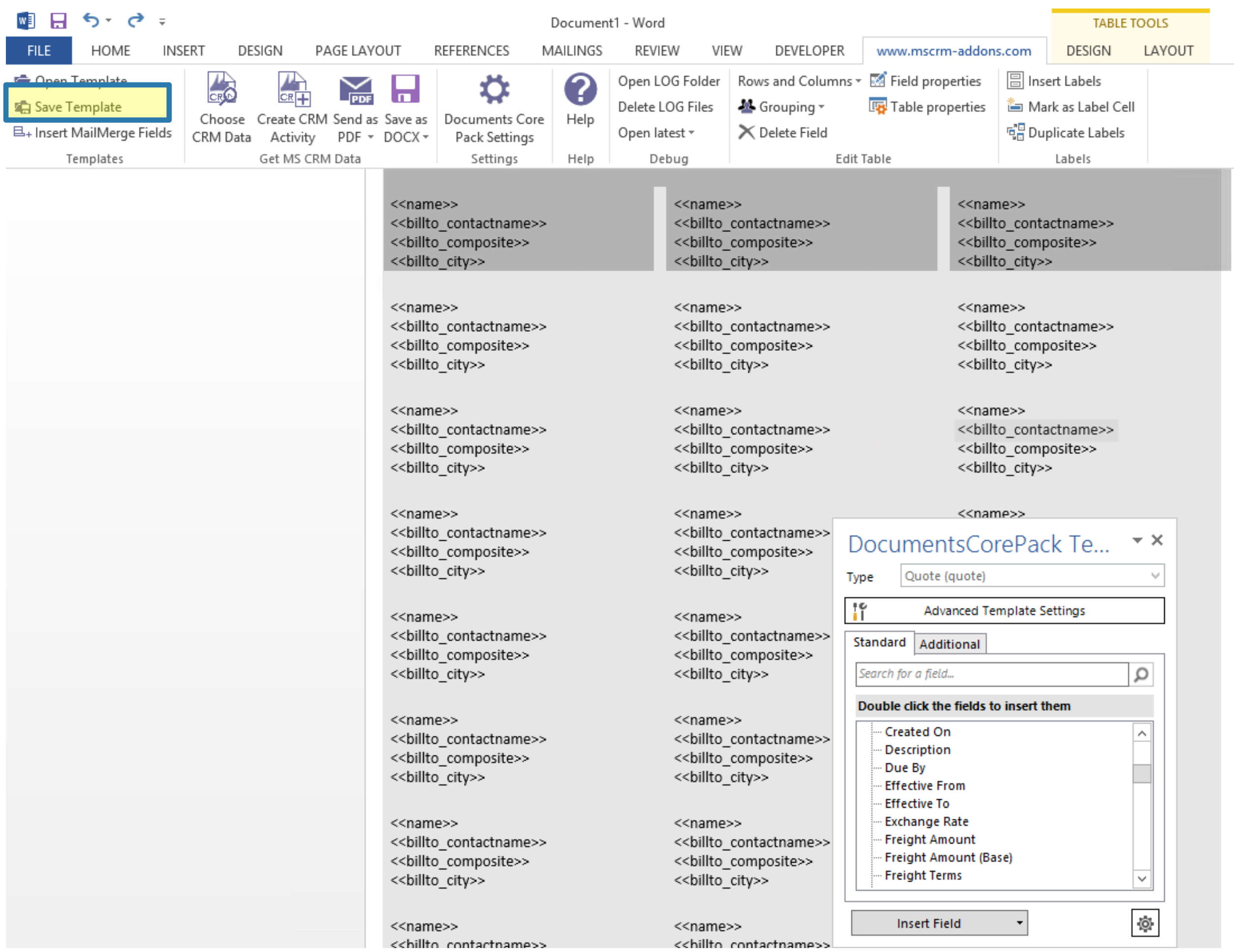


Figure 126: Result: Label templates based on various records at once

5.5.7 [OPTIONAL]: Define the sorting of label templates for specific needs

The general settings provide you with the possibility to sort label templates. In order to do so, please check the *Mark as Label Template*-option and click into this field 1 in order to activate the sorting function.

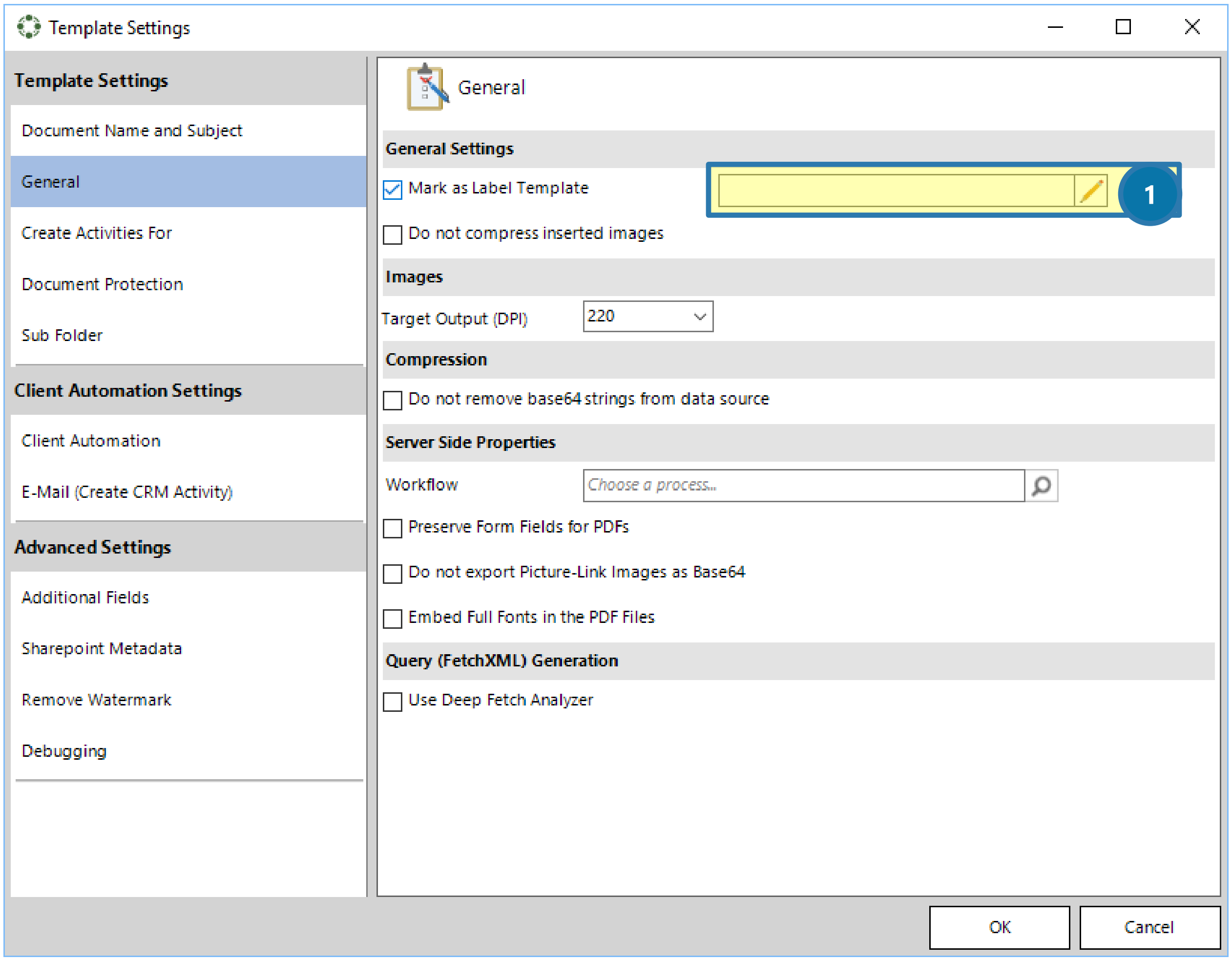


Figure 127: Enable the sorting of label templates

Next, you will be provided with the Label Template Sort – Order dialog. Please select here some fields and setup a sort order.

In our example, we decided to sort the label templates in the following order: firstname, gendercode

Once you have finished your settings, please click on the ***[OK]***-button.

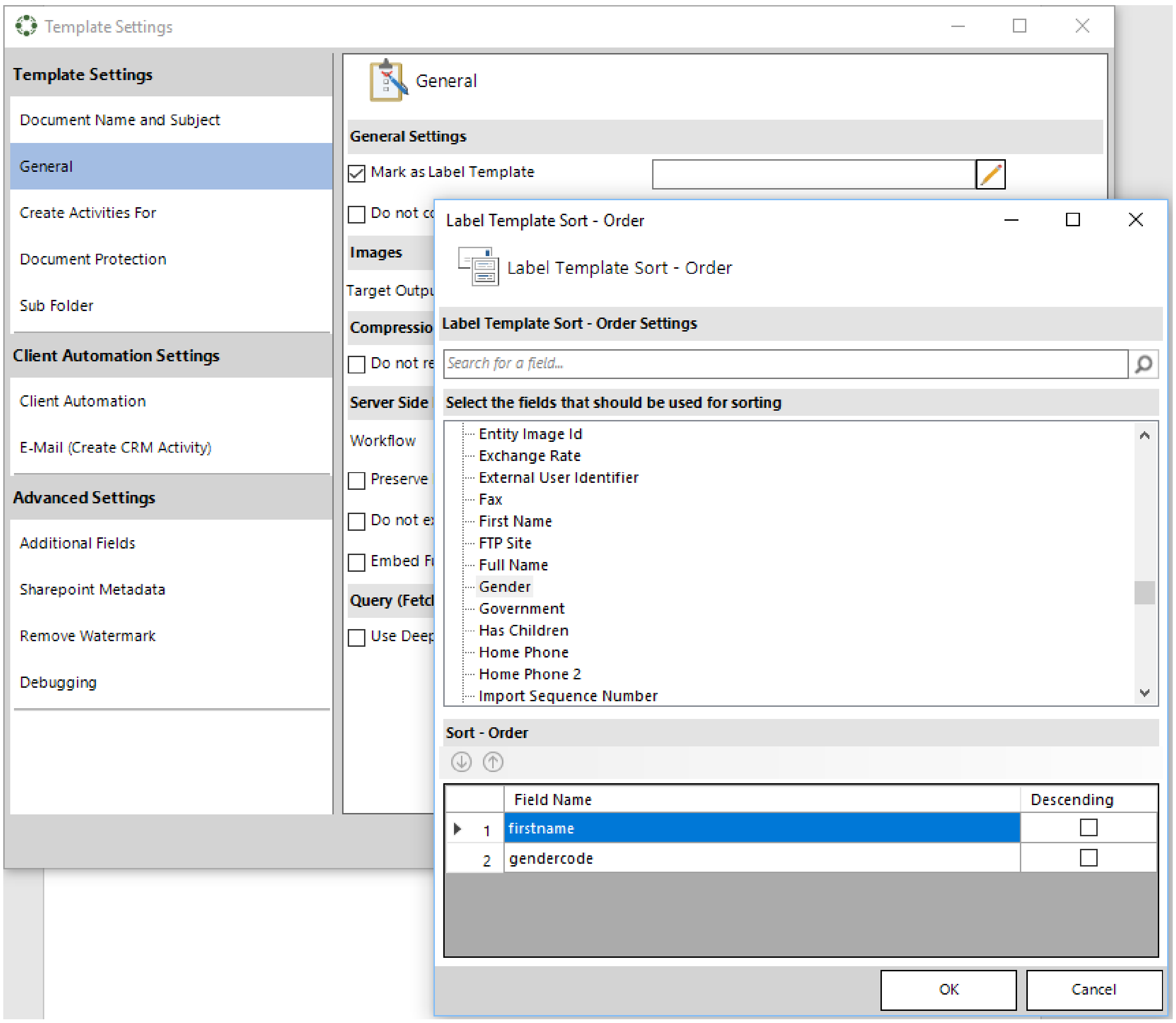


Figure 128: Sort order of label templates

As soon as you have finished to set up a sort order, the order will be visible in the sort order box.

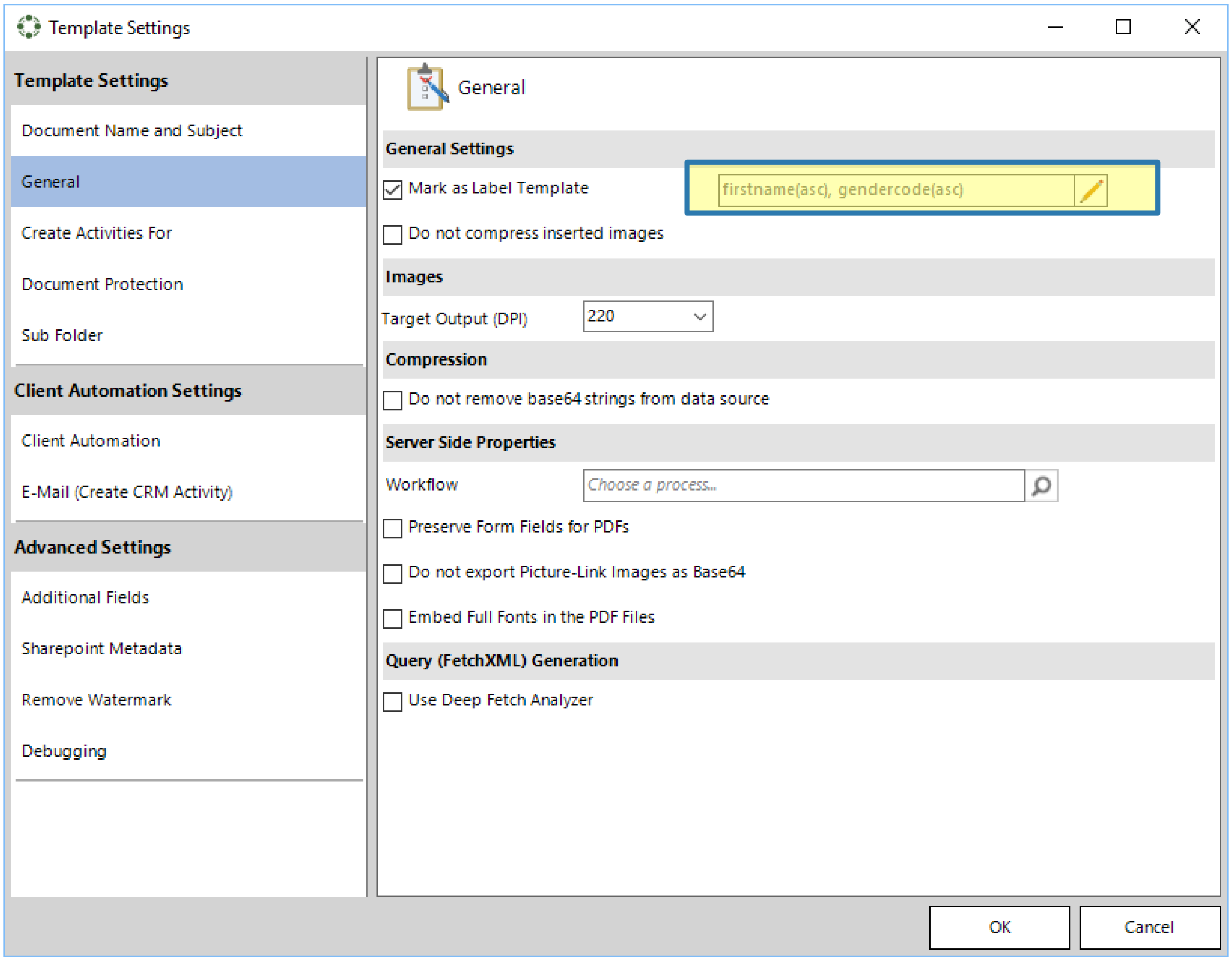


Figure 129: Mark as Label Template - sorting set

You can now proceed as usual with creating label templates.

5.6 How to create a relation from scratch

This “How to” describes how to create a relationship from scratch with DocumentsCorePack Template Designer. Basically, relations can be solved for 1:N (1:many) and N:N (many:many) relationships. All, custom entities, as well as system entities, are supported.

5.6.1 Create a template

For further information on how to create a template, please have a look at CHAPTER 5.1 HOW TO CREATE DOCUMENTSCOREPACK TEMPLATES ON PAGE 98. In our example, we will create a template for an Account overview.

5.6.2 Insert some fields

For further information on how to insert fields, please have a look at chapter 5.1.2 STEP 2: INSERT FIELDS ON PAGE 100. As you see below, we have inserted the following fields: <<accountid>> and <<name>>

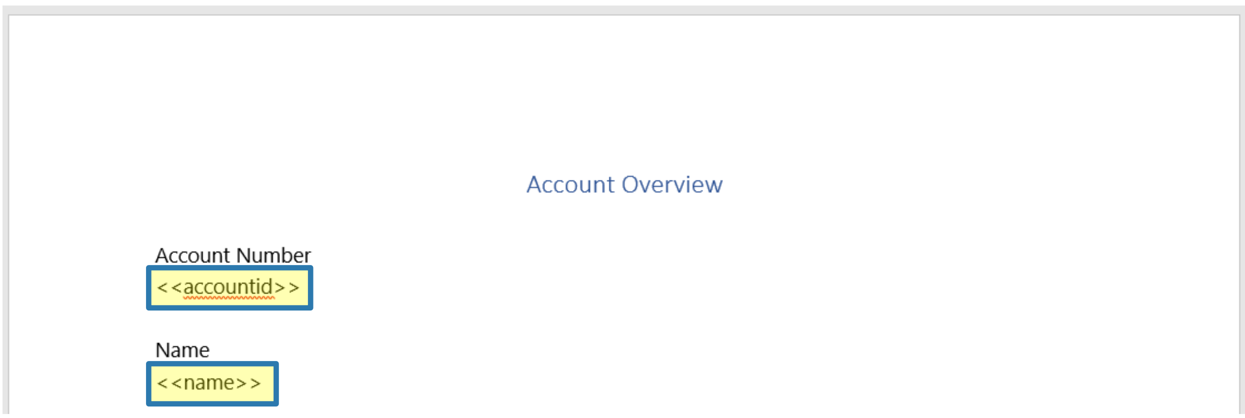


Figure 130: Insert fields

5.6.3 Add a new relationship

Next, go to the additional tab and open the ***[Add Relationship/Entity]***-drop down menu. There, select *Add New Relationship…* For further information on the Additional tab, please have a look at chapter 1.7 ADDITIONAL-TAB ON PAGE 39.

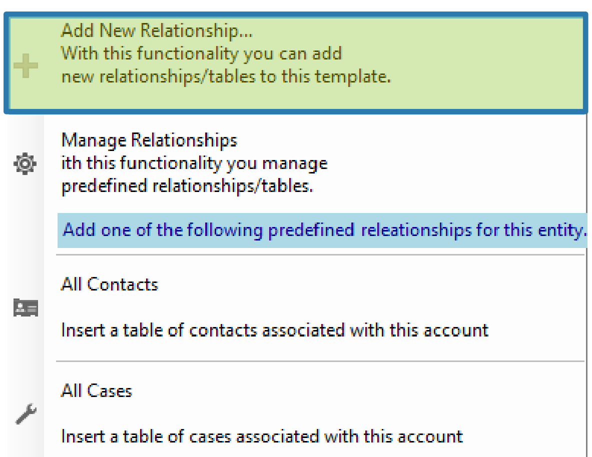


Figure 131: Add new relationship

In the so opened *Configure Fields and Datasource*-dialog, select a relationship you would like to insert ❶ and add some attributes by checking the boxes next to the attributes ❷.
We decided to go with the Relationship *Account -> Activity [regardingobjectid]* and added the following attributes: *Activity, Actual End, Actual Start, Due Date*.

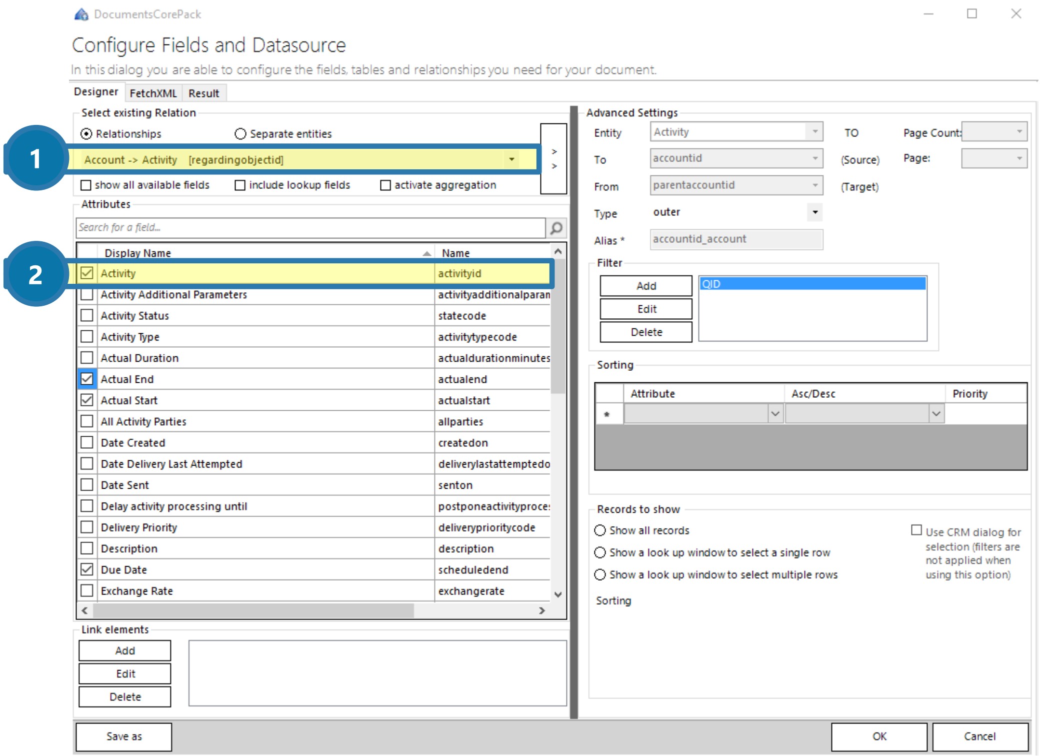


Figure 132: Add a new relationship

As you can see, the resolved entities are now also visible in the *Additional*-tab of the Template Designer and you could insert any of the fields into the document. But usually, there are more complex relationships needed. That is why you may expand the complexity of the relationship by adding more levels.

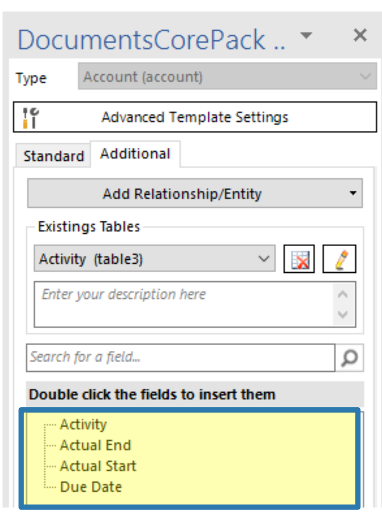


Figure 133: Resolved fields

5.6.4 Add further relationships

If you would like to add further relationships, please simply click on the ***[Edit]***-button in the *Additional*-tab.

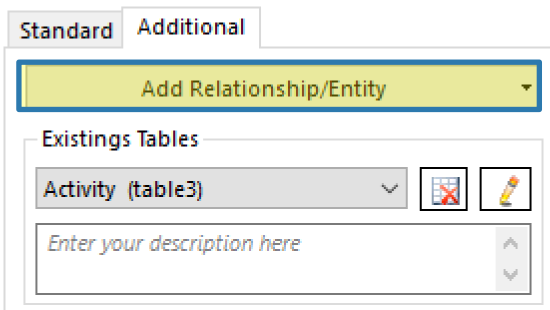


Figure 134: Click on the [Edit]-button

This action opens the *Configure Fields and Datasource*-dialog again, providing you with the former established relationship. Please click on the ***[Add]***-button 1 and add another relationship 2 here. We decided to add *Activity [activityid] -> Attachment [objected]* and the entities *Attachment Number, Entity, File Name, Subject* 3.

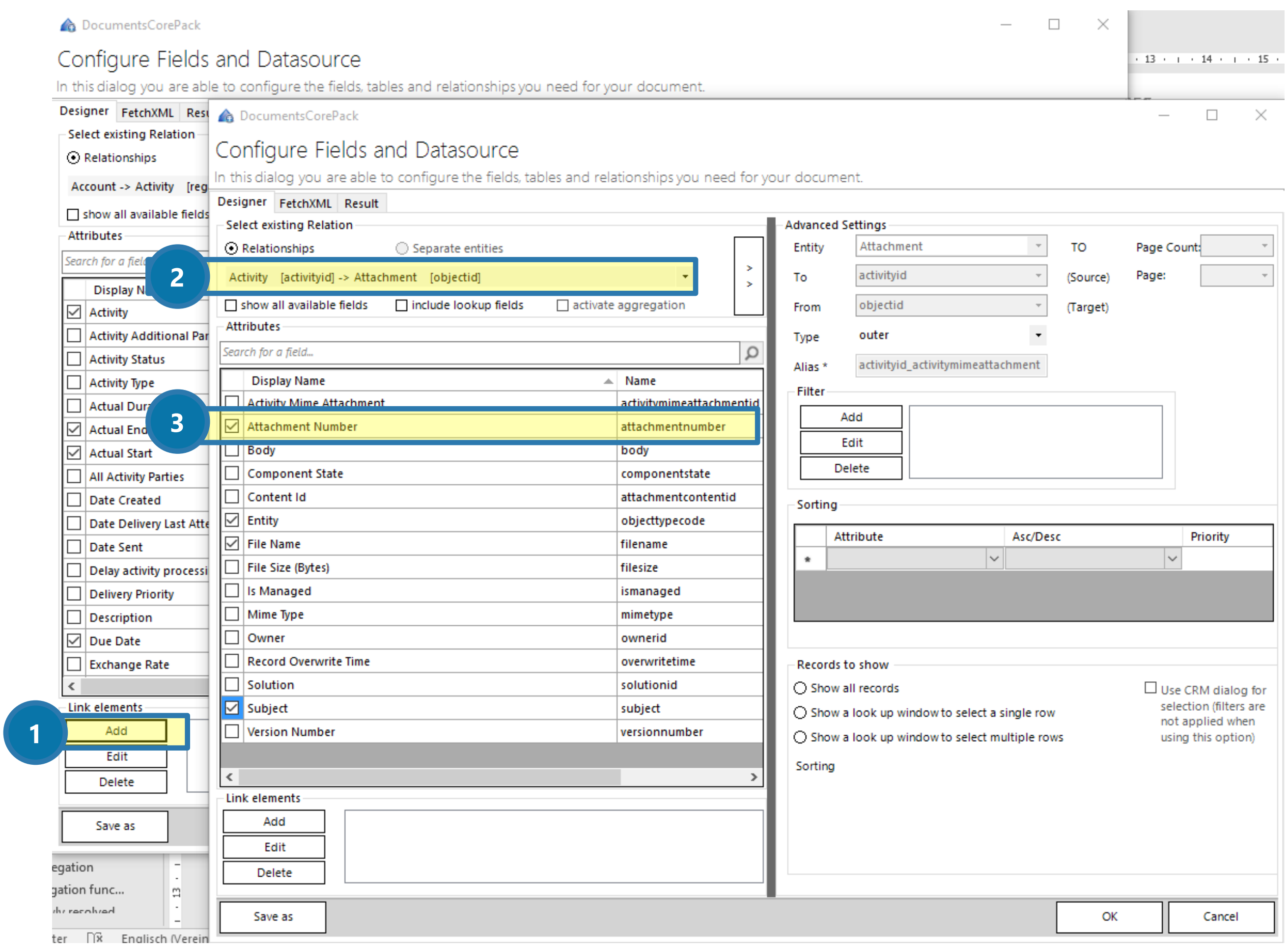


Figure 135: Add another relationship

As you can see, the resolved entities are now also visible in the *Additional*-tab of the Template Designer and you could insert any of the fields into the document.

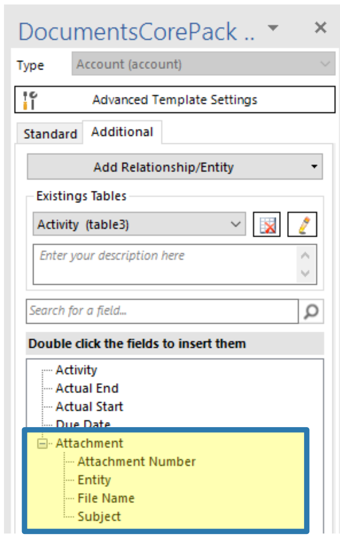


Figure 136: Additionally, resolved fields

You may repeat these steps as often as you would like to in order to enhance the complexity of your relationships.

Once you have created all the necessary relationships, you may enter the corresponding fields into your template. Do not forget to save your template! Last but not least, test your template. Please have a look at CHAPTER 5.3 HOW TO TEST YOUR TEMPLATE ON PAGE 114 in order to learn how to do so.

5.7 How to create a relation to a separate entity (no relation)

This "How to" describes how to create a relation to a separate entity with DocumentsCorePack Template Designer. Basically, the creation of a relation to a separate entity follows the same rules as the creation of an entity from scratch with one exception. Therefore, in order to create a relation to a separate entity, follow the steps in CHAPTER 5.6 HOW TO CREATE A RELATION FROM SCRATCH ON PAGE 124.

Make sure to change the following parameter when you select a new relationship: Instead of *Relationships*, check *Separate Entities* 1 in the *Select existing Relation*-section. The main difference is, that you will now be provided with separate entities 2 instead of relationships.

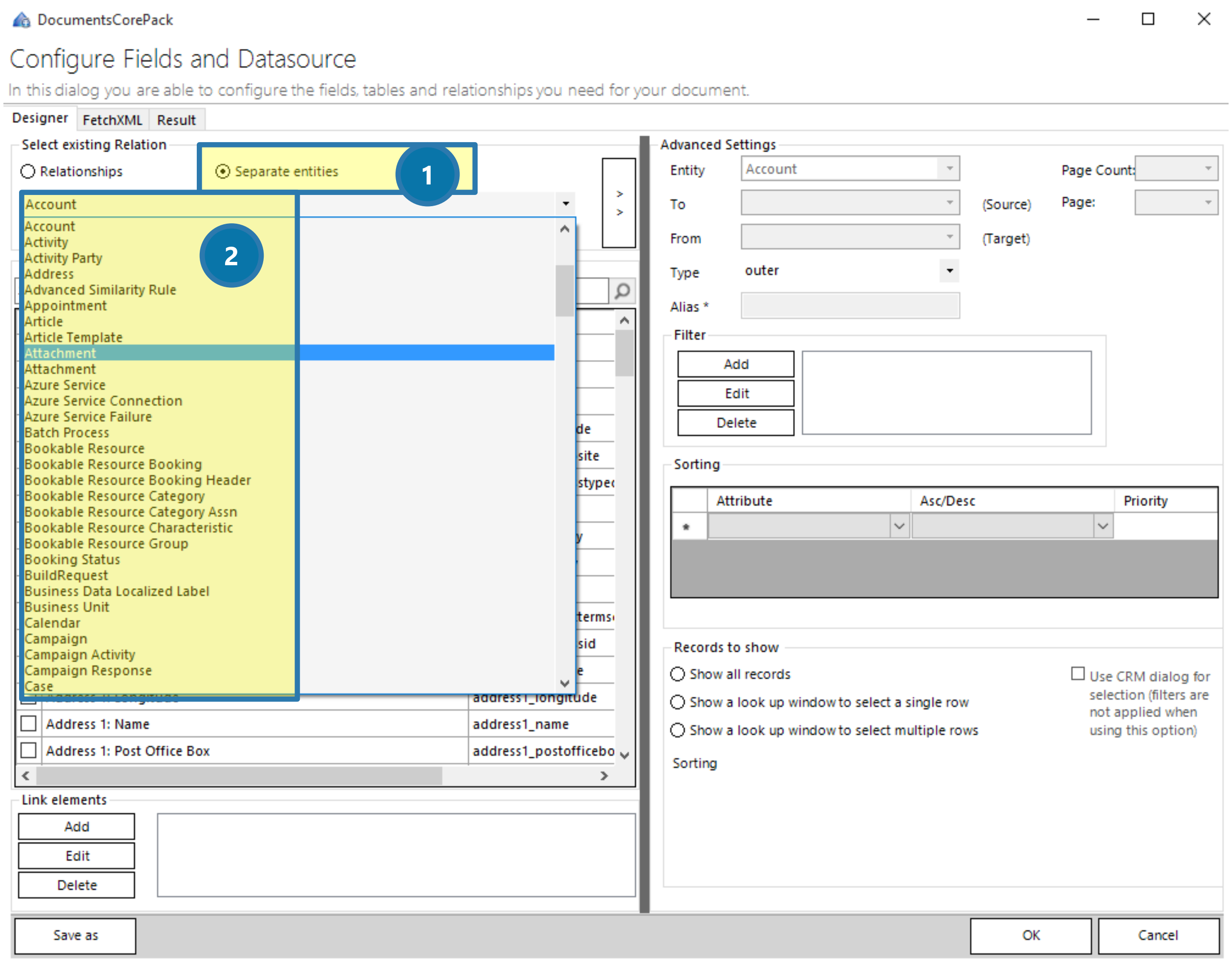


Figure 137: Insert separate entities

5.8 How to create an aggregation fetch

This "How to" describes how to create an aggregation fetch. Aggregated fetches are a useful functionality when you create templates. Please click here to get an overview of aggregation in DocumentsCorePack.

5.8.1 Open the Template Designer

For further information on how to open the Template Designer, please have a look at CHAPTER 1.2 HOW TO OPEN THE DOCUMENTSCOREPACK TEMPLATE DESIGNER ON PAGE 12.

5.8.2 Open the Configure Fields and Datasource dialog

Next, select the entity type you would like to work on (here. *Account*), click on the Additional-tab and then, on the ***[Add Relationship/Entity]***-button. For further information on the Additional-tab, please have a look at CHAPTER 1.7 ADDITIONAL-TAB ON PAGE 39.

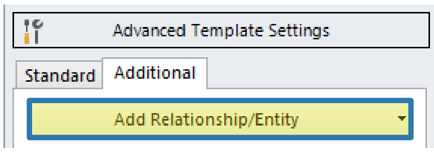


Figure 138: Add Relationship/Entity

5.8.3 Activate aggregation

In the so opened dialog, select a relationship in the drop-down menu 1 (in our example Account –> Contact [parentcustomerid]) and check the activate aggregation 2 functionality. Hit the ***[Yes]***-button in the now appearing *DocumentsCorePack Warning* - question dialog. 3

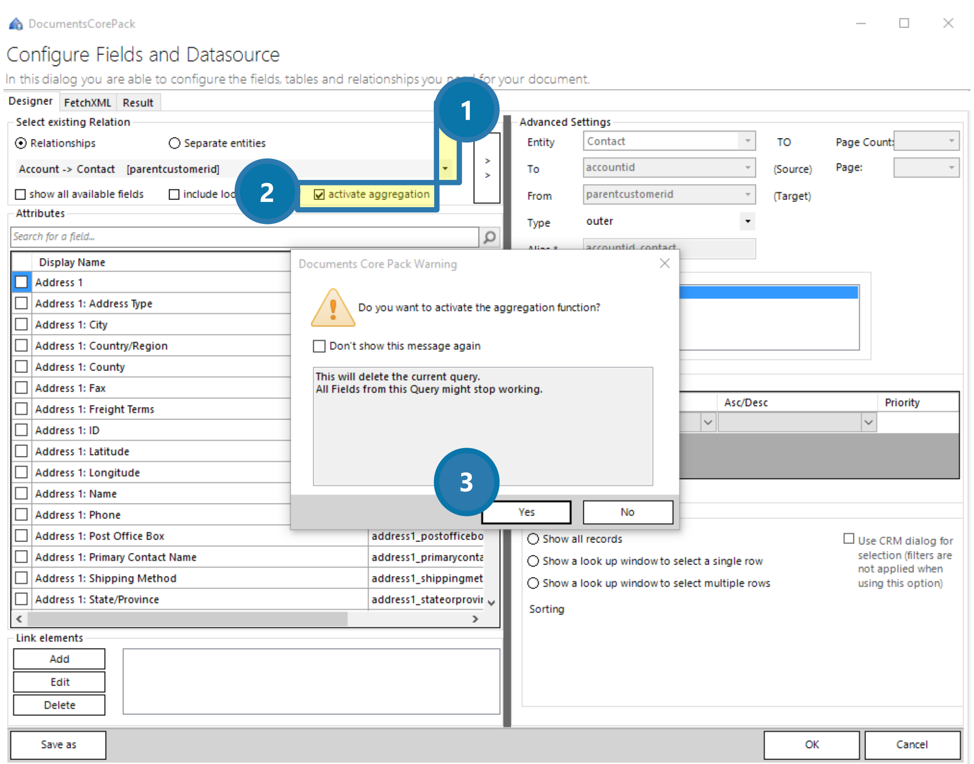


Figure 139: Activate aggregation

5.8.4 Set the aggregation functionality

In the window that opens now, you may set certain aggregation functionalities. The attribute-drop down menu enables you to select an attribute-field, while the aggregate/group by drop-down menu provides you with an overview of which aggregation functionalities can be applied to this particular field. Click on the ***[OK]***-button in order to proceed.

The aggregation functionalities depend on the attribute-field you select.

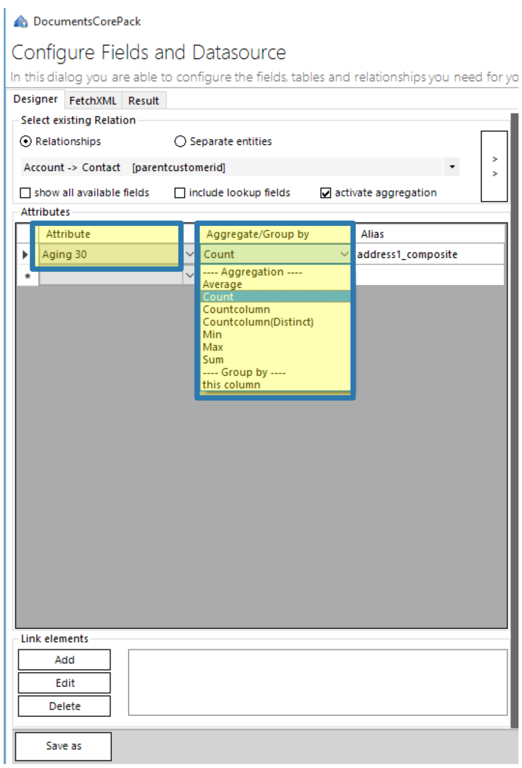


Figure 140: Set the aggregation functionality

5.8.5 Insert the newly resolved relationship

Now click somewhere into your template and double-click the new relationship on the right side ① in order to insert it. The relationship consists of two parts: *Aging 30 (count)*

While *Aging 30* is the name of the field, the item in brackets explains the aggregation functionality that has been applied to the relationship. However, insert your preferred table settings ② and click on the ***[OK]***-button in order to proceed.

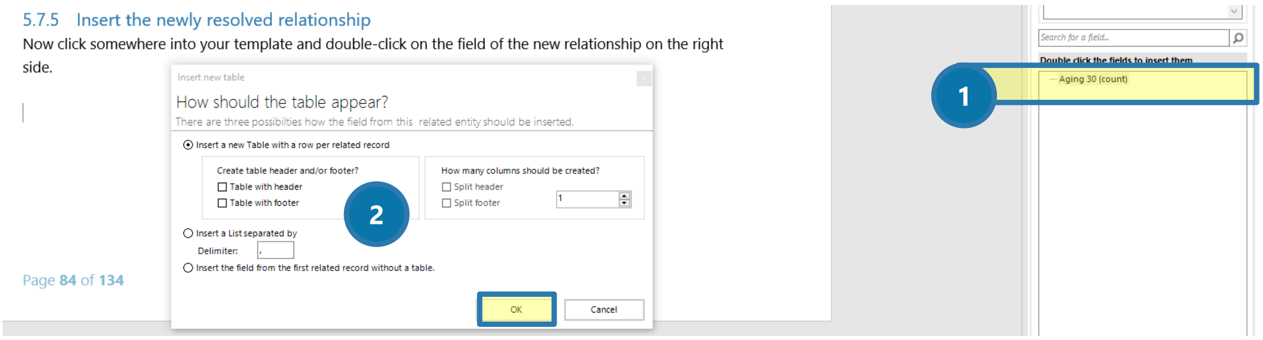


Figure 141: Insert resolved relationship

5.8.6 The result

We decided to insert a table with a split header and a footer in our example. The resolved relationship has been added to our template and may look similar to the below table.

<<address1_composite>>	

When you have inserted all the fields you wanted to insert, make sure that you save your template. Next, merge it with CRM data and test it if you want to. If you haven't ever merged and/or tested a template before, please have a look at CHAPTER 5.3 HOW TO TEST YOUR TEMPLATE ON PAGE 114.

5.9 How to properly format an address block

This "How to" describes how to create and form an address block properly.

5.9.1 Create an address block with DocumentsCorePack Template Designer

In order to prepare an address block, you have to open the Template Designer, select your main entity and insert the fields you want to be displayed in the block. (SEE CHAPTER 1.4.3 HOW TO CREATE DOCUMENTSCOREPACK TEMPLATES, PAGE 98 FOR MORE INFORMATION ON HOW TO CREATE TEMPLATES AND INSERT FIELDS.) If you have chosen for example "Account" and inserted all required fields, do not forget to save the template! A possible result could look like this:

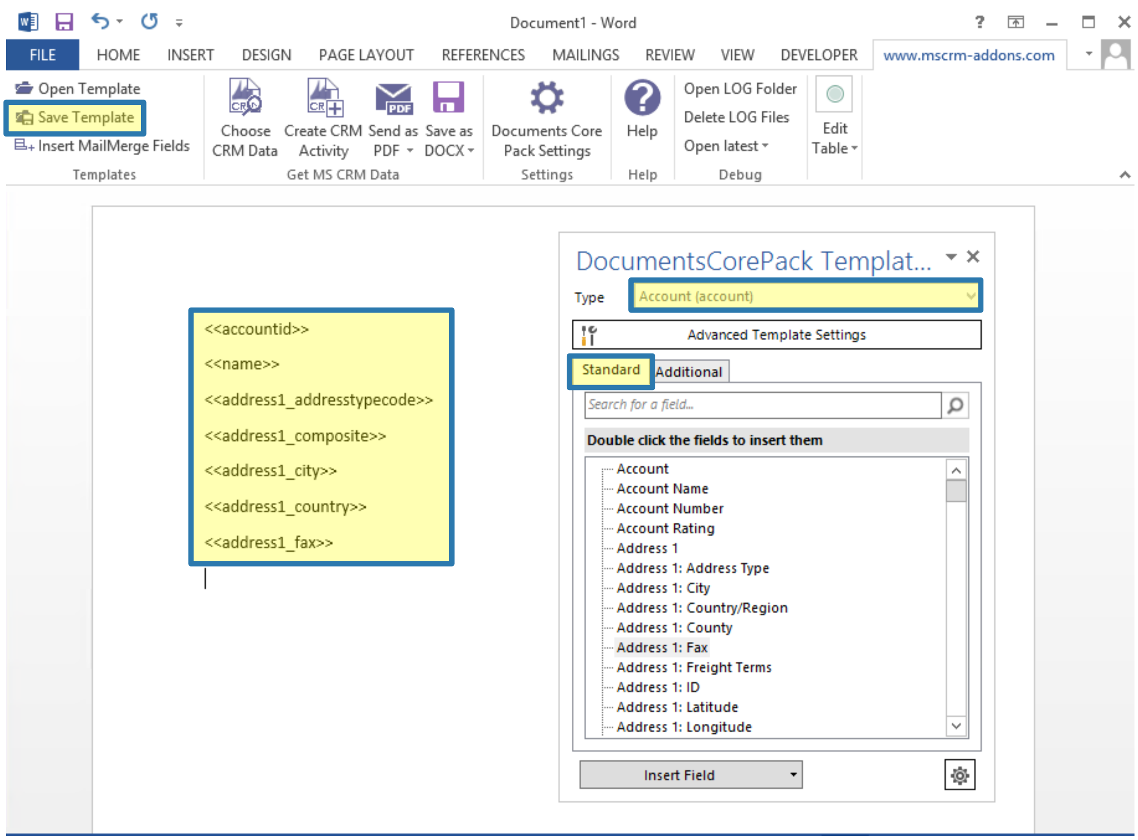


Figure 142: Example address block created with DCP Template Designer Standard-tab fields

5.9.2 Choose your CRM Data and get your results

Once your template is saved, click on the ***[Choose CRM Data]***-button. In the *Name* – field you can search for the account you want to insert. Select the appropriate record and click on the ***[Select]***-button in order to continue.

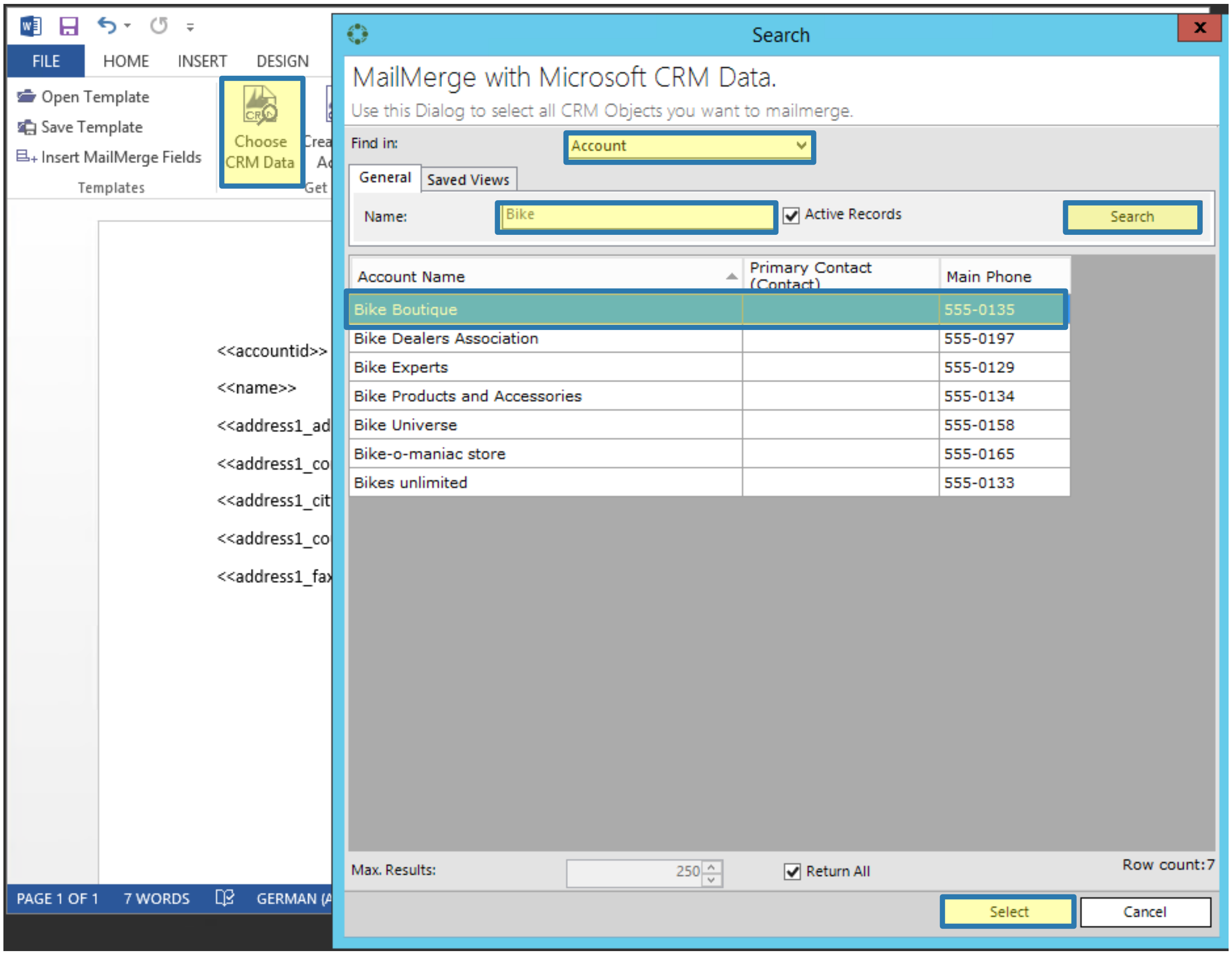


Figure 143: Choose CRM data from MailMerge with Microsoft CRM Data dialog.

If you check the *Active Records* – checkbox, only the active records will be displayed. If not, you will be provided with all records (no matter if inactive or not).

5.9.3 Merged document with missing data – troubleshooting

Now after we have merged our template, we got a rather dissatisfying result, which is shown in Figure 93. On the right side, you can see that there are lots of important data missing in the result. The reason therefore is, that the data is also missing in the source, say, it has never been saved in Microsoft Dynamics CRM/Dynamics 365 properly. That is why DocumentsCorePack cannot merge it. Now, how do we solve this issue?

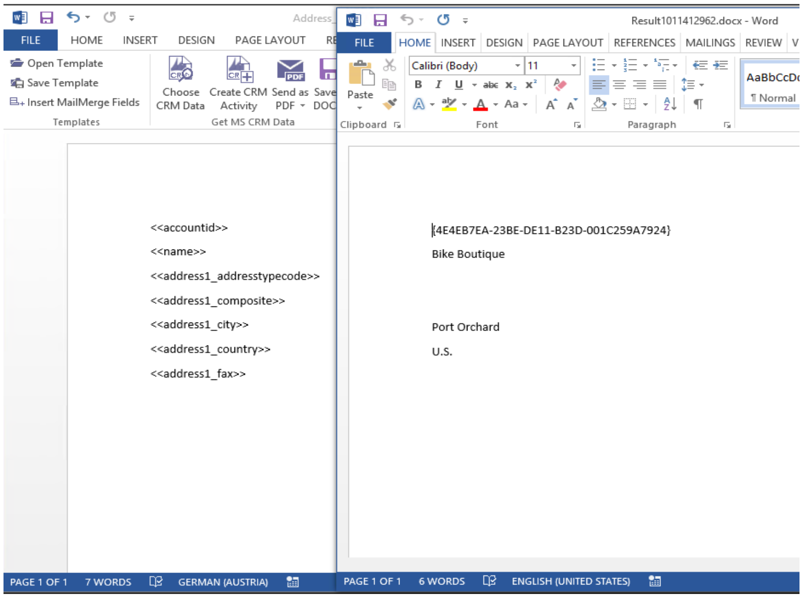


Figure 144: Template (left) vs Merged address block with missing information (right)

5.9.4 How to format an address block with missing data properly?

To format an address block, simply click in one of the fields you want to format and click on ***[Field properties]*** in the *www.mscrm-addons.com* – tab and the *String Properties dialog* will open. For further information on Field properties, please SEE CHAPTER 1.10 FIELD PROPERTIES, PAGE 61.

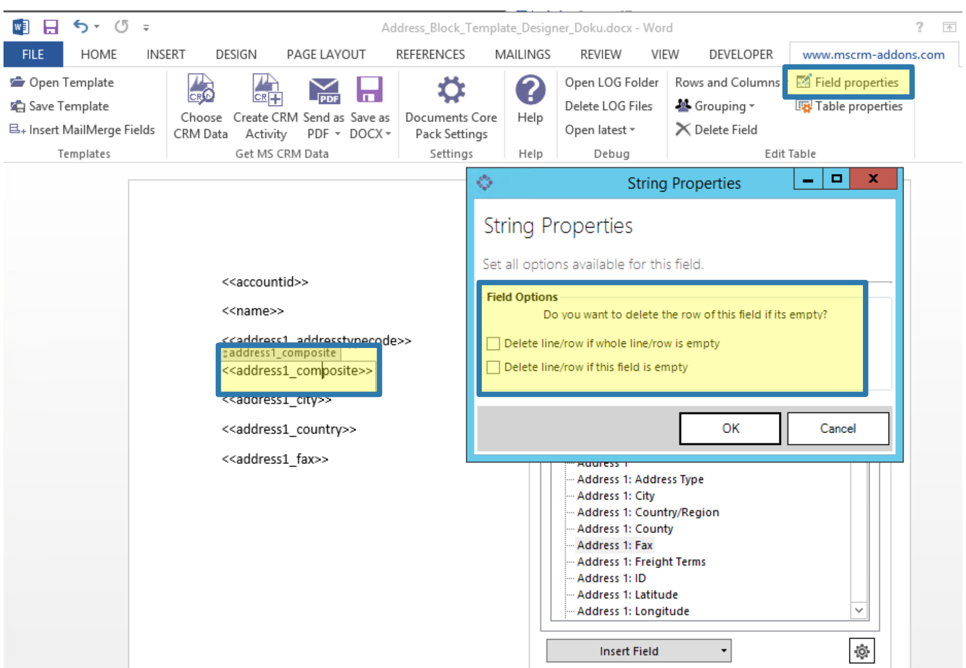


Figure 145: String properties dialog with template in the background

The String Property dialog provides you with two options on how to proceed with empty lines:

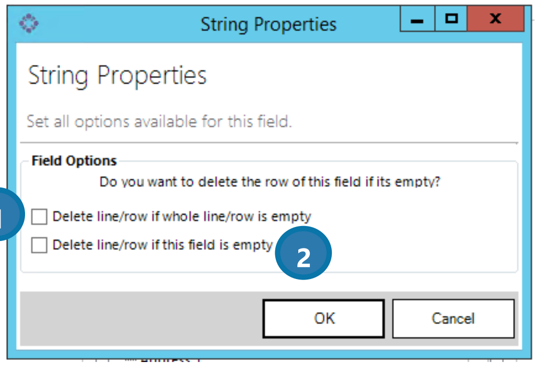


Figure 146: String properties dialog

1 Activating this checkbox will delete the line/row if the whole line/row is empty after the merge process.

2 Activating this checkbox will delete the line/row if the selected field is empty. If you, for example, select the field <<address1_postalcode>> and activate this checkbox, the line will be deleted if there was no data stored in the postalcode-field in CRM. No matter if there was data information in the field address1 or or not.

All characters like hyphens, colons, commas, as well as words or additional text are also counted as signs and therefore the whole line will not be deleted. Should you stumble over such a case, simply check checkbox 2.

5.10 How to Insert as Picture Field

Before you can insert a field as a picture field, you have to save at least one picture in your CRM. Pictures can be saved as *entity image* (e.g. with "Contact" or "Account") or as a *note*. Once saved, pictures will be embedded into the future document as base 64 images.

Select this option if you know, that the document's recipient has a bad or no internet connection. Do not choose this option if you want to send a document with a lot of images. (In this case rather use theHow TO INSERT A PICTURE Link Field (PLEASE SEE AS WELL CHAPTER 1.9.2 INSERT AS A PICTURE-LINK FIELD, PAGE 49)

However, as soon as you have saved at least one picture, you can start.

5.10.1 How to insert a picture that has been saved as entity image previously

Open the DocumentsCorePack Template Designer and select the entity you would like to work with, for example, *Contact*. Now look for *entity image* in the Standard Tab. The best way to do this is via the search. Learn more about the search functionality in chapter 1.4.4 SEARCH WITH THE ATTRIBUTES TREEVIEW, PAGE 18.
Once you have found the field *Entity Image*, simply click on it and then click on the *Insert Field Drop Down Menu*. There, select the option Insert *'Entity Image' as Picture Field*. As soon as you have done so, a placeholder will be displayed in your document. Once merged, the picture will be visible instead.

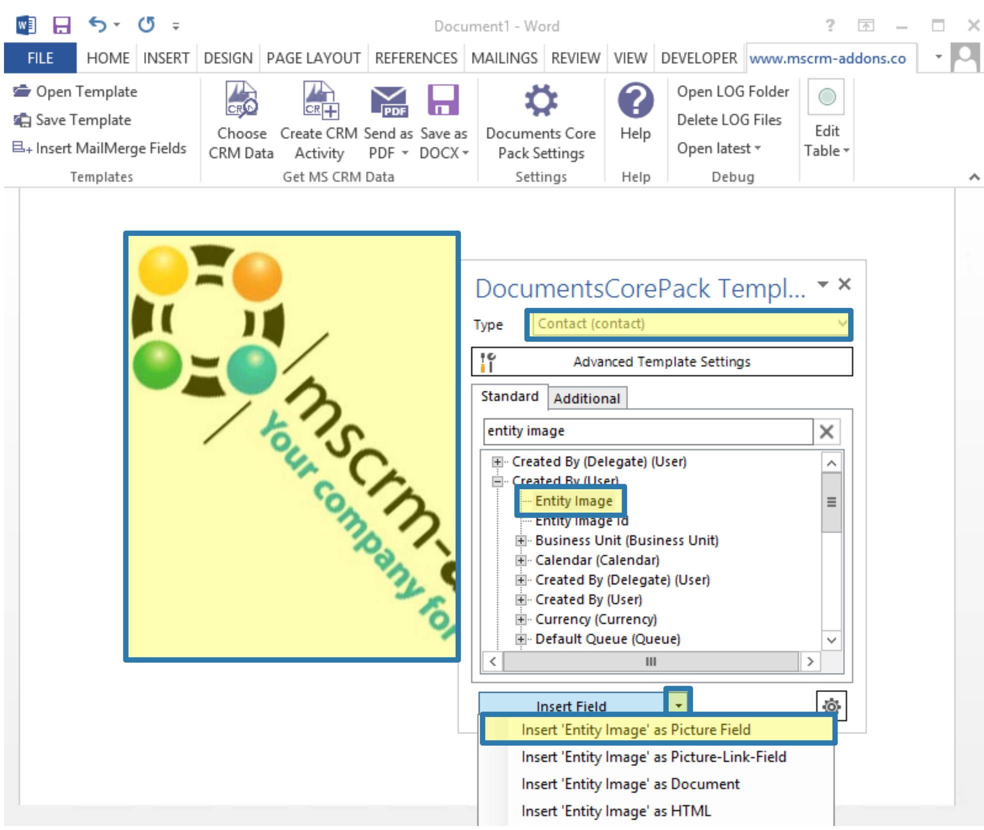


Figure 147: Insert 'Entity Image' as Picture Field

5.10.2 How to insert a picture that has been saved as a note

Open the DocumentsCorePack Template Designer and select the entity you would like to work with, for example, *Contact*. Now open the Additional Tab and click on the ***[Add Relationship/Entity]*** – button. (SEE CHAPTER 1.7.1 ADD RELATIONSHIPS/ENTITY, PAGE 40 FOR FURTHER INFORMATION).

Within the *Configure fields and data source – window*, set up a relation between your entity and the location where you have saved your picture previously. To do so, select, for example, Contact -> Note in the Relationship drop-down menu. Then look for Note in the attributes' section and mark the field. Press the ***[OK]***-button to proceed.

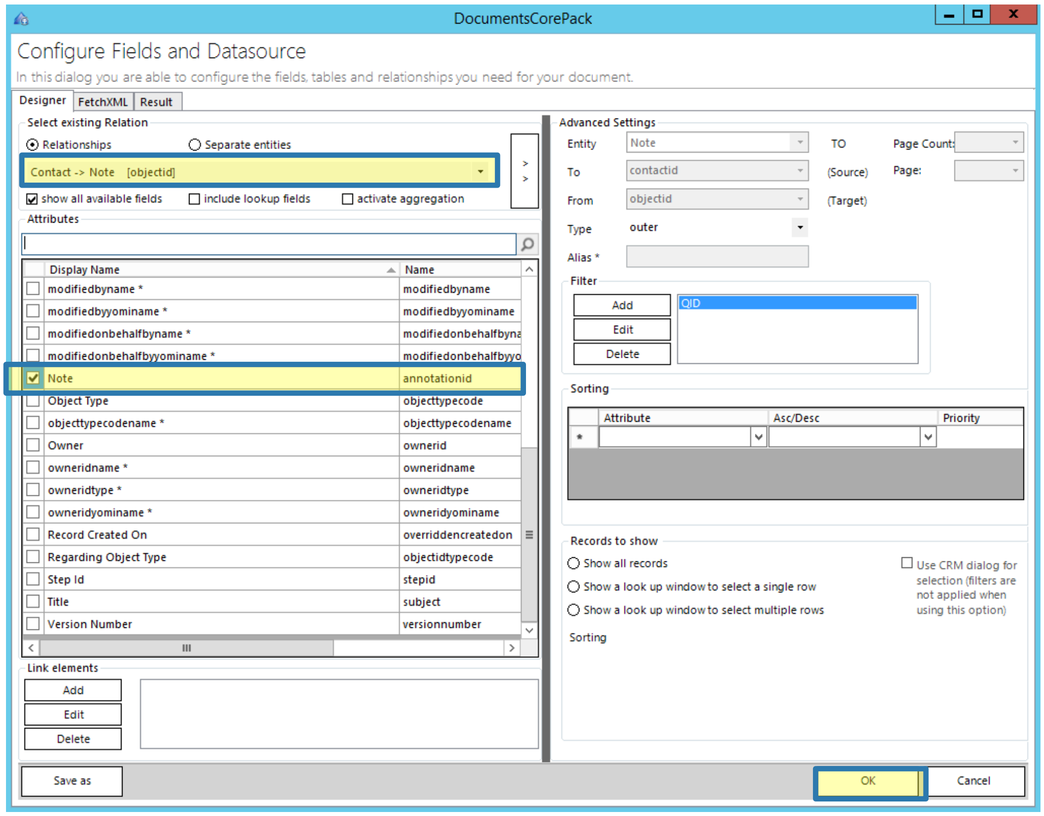


Figure 148: Configure Fields and data source – set up relation between entity and note

Your previously created Contact <> Note relationship is now to be seen in the DocumentsCorePack Template Designer Additional tab as a table. Click on the location in your template where you would like to insert the picture, then click on *Note* and on *Insert 'Note' as Picture Field*.

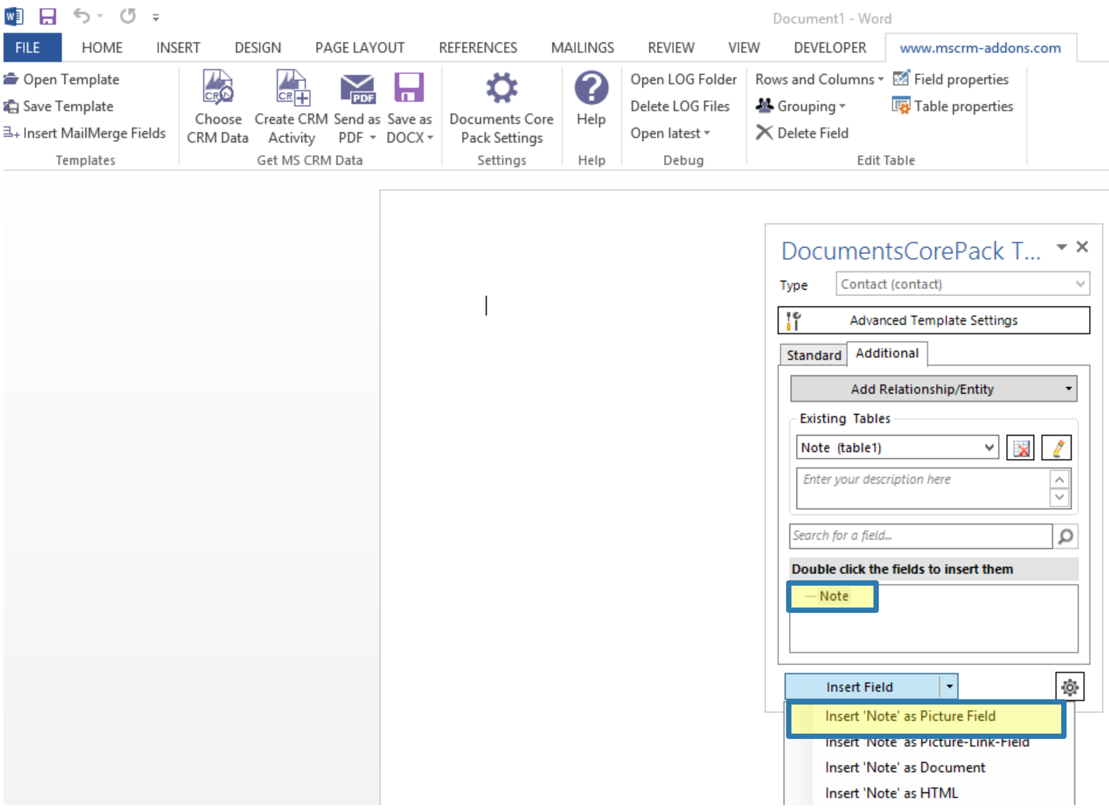


Figure 149: Additional Tab – Contact <> Note relationship

The next dialog allows you to decide whether you want to insert the newly generated relation field as a table or not. We decided not to do so in our example (that is why we marked the option *Insert the field from the first related record without a table*, but you could as well customize the picture as a table. SEE CHAPTER 5.1.4 STEP 3: INSERT THE TABLE, PAGE 102 for more information on how to format a table. However, click on the ***[OK]***-button in order to proceed.

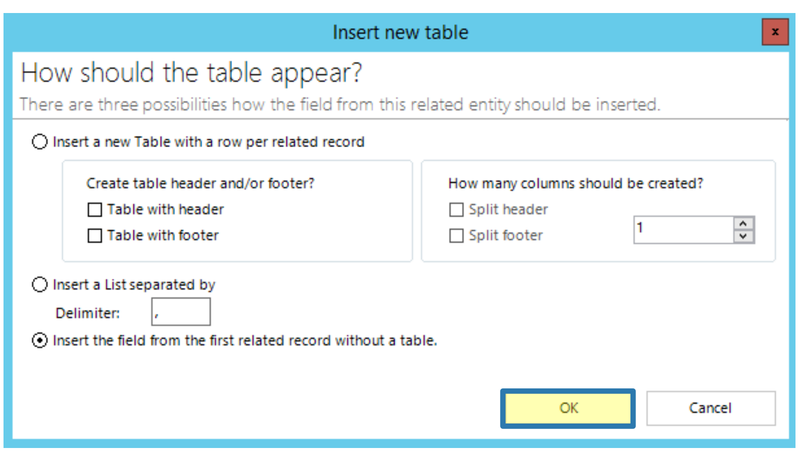


Figure 150: Insert as picture field – insert new table dialog

That's it! You are provided with a beautiful placeholder, which will be replaced by the picture in the future document.

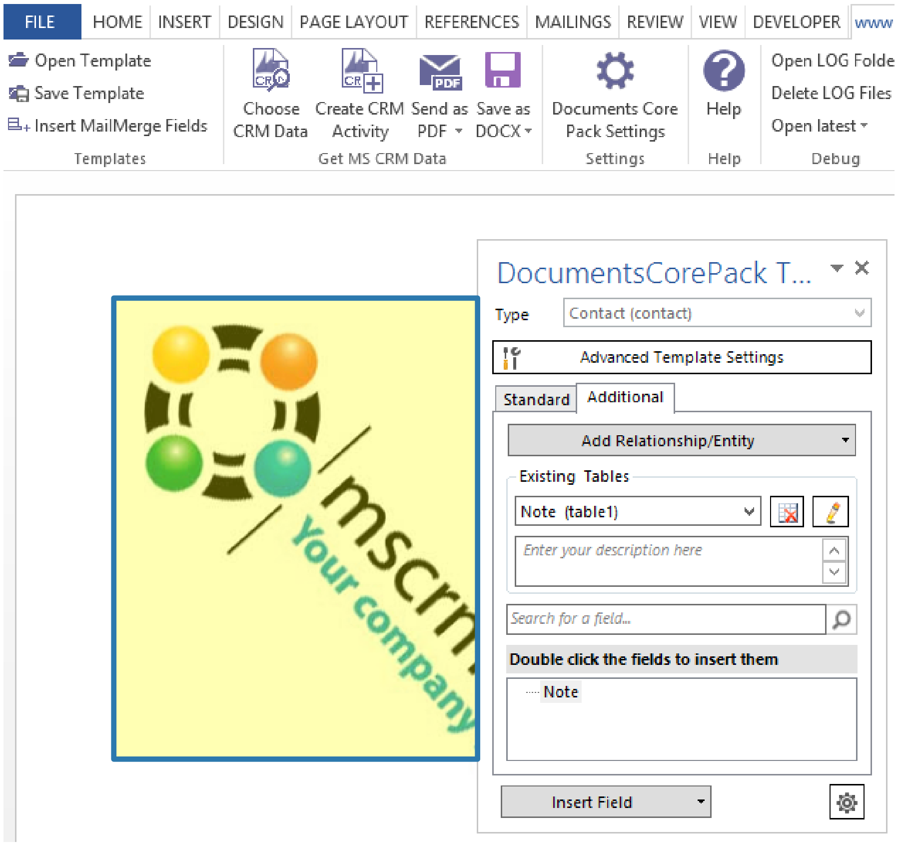


Figure 151: Insert as picture field – Placeholder

5.11 How to Insert a Picture Link Field

Before you can insert a field as a picture-link-field, you have to save at least one link to a certain picture in a random text-field in your CRM.

Select this option if you want to create a document that will contain lots of pictures. Due to the functionality of this *insert as*-option, the documents' size will be smaller than the size of a document that had its pictures directly inserted. This option is also very useful if you use pictures in your document that are subject to seasonal changes. Do not use this option if you know that the recipient has a bad or no internet connection (In this case rather use the INSERT AS PICTURE FIELD OPTION – SEE CHAPTER 1.9.1 INSERT AS PICTURE FIELD PAGE 48.)

However, as soon as you have saved at least one picture-link, you can start.

How to insert a picture that has been saved as picture-link previously

We have saved our picture-link in the description-field previously in Microsoft Dynamics CRM/Dynamics 365. You can save your picture-link in any available text-field in your CRM. However, please do not forget to save your changes.

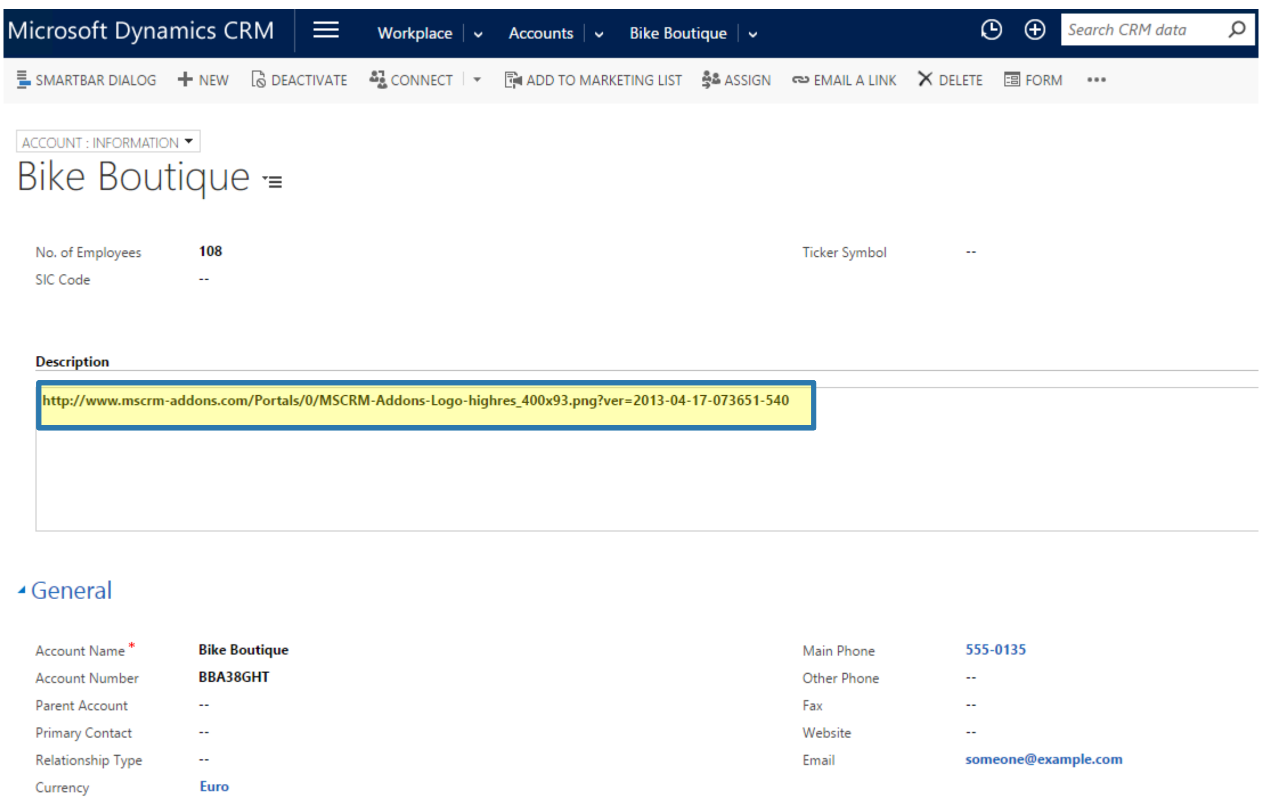


Figure 152: Add link as picture link to the description field

Once you have created such a save-location, open the DocumentsCorePack Template Designer and select the entity you would like to work with. We use the entity *Account* and the field *Description* in this example.

Now look for the field in which you have saved the picture link previously in the Standard Tab. The best way to do this is via the search. Learn more about the search functionality in chapter 1.4.4 SEARCH WITH THE ATTRIBUTES TREEVIEW, PAGE 18.

Click on the location in your template where you would like to insert the picture, then click on *Description* and on *Insert 'Description' as Picture-Link-Field*. (At least, that is what we do in our example – if you have saved your picture-link in another location, you must enter the corresponding field.)

That's it! You are provided with a beautiful placeholder, which will be replaced by the picture in the future document.

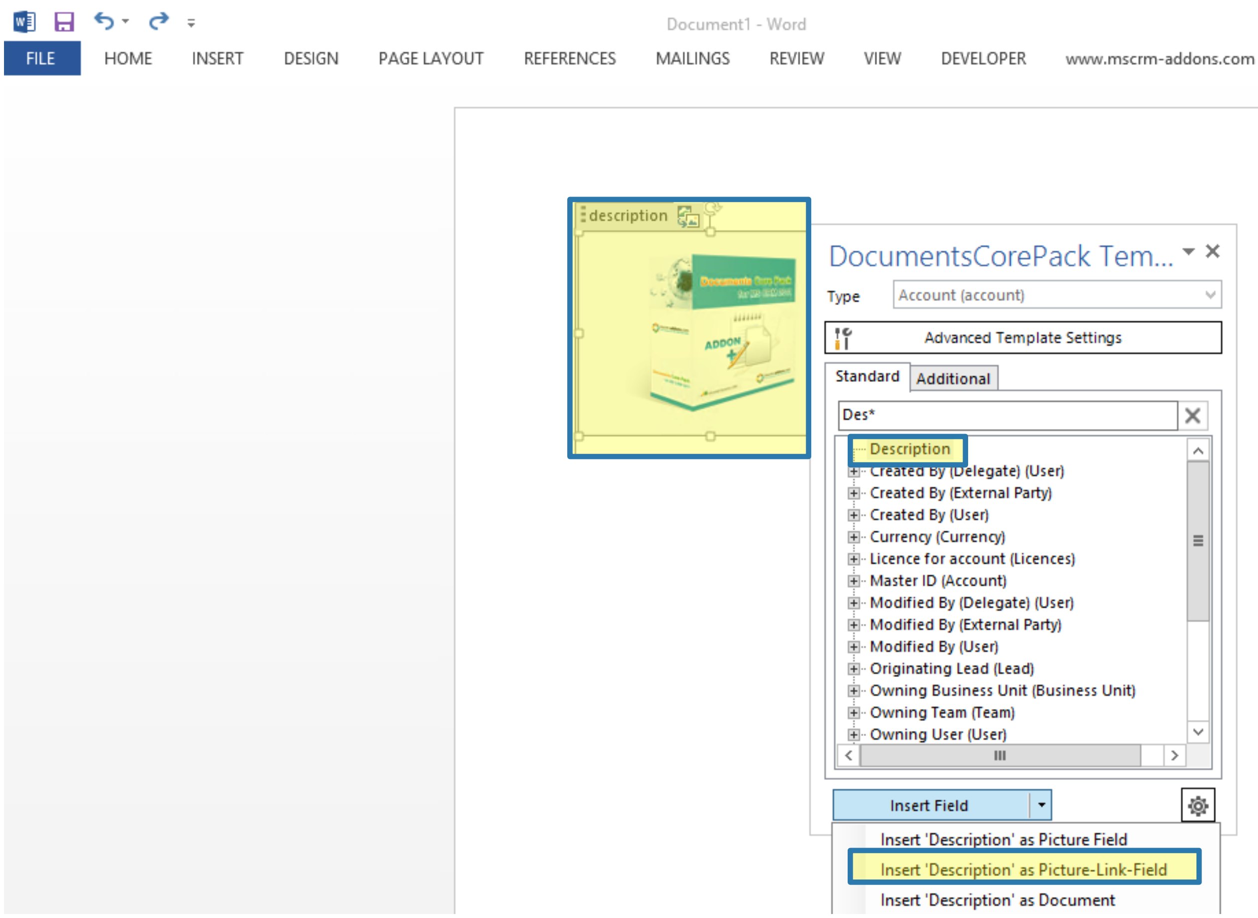


Figure 153: Insert the description-field as picture-link-field

5.12 How to insert as document

Before you can insert a field as document, you have to save at least document as a note in your CRM.

This option can only be executed in the Additional tab. For further information about the additional tab, please have a look at CHAPTER 1.7 ADDITIONAL-TAB ON PAGE 39.

Once you have saved a document as a note in your CRM, you can proceed.

5.12.1 Set up a relationship between your entity and the documents' save location

Open the DocumentsCorePack Template Designer and select the entity you would like to work with, for example, *Account*. Now open the Additional Tab and click on the ***[Add Relationship/Entity]*** – button. (SEE CHAPTER 1.7.1 ADD RELATIONSHIPS/ENTITY, PAGE 40 FOR FURTHER INFORMATION).

Within the *Configure fields and data source – window*, set up a relation between your entity and the location where you have saved your document previously. To do so, select, for example, Account -> Note in the Relationship drop-down menu. Then look for Note in the attributes' section and mark the field. Press the ***[OK]***-button to proceed. (In chapter 5.10.2 HOW TO INSERT A PICTURE THAT HAS BEEN SAVED AS A NOTE PAGE 140, we provide you with an example of how to resolve such a relationship correctly.)

5.12.2 Insert as document

As soon as you have created your note, click on *Insert 'Note' as document* in the Additional Tab.

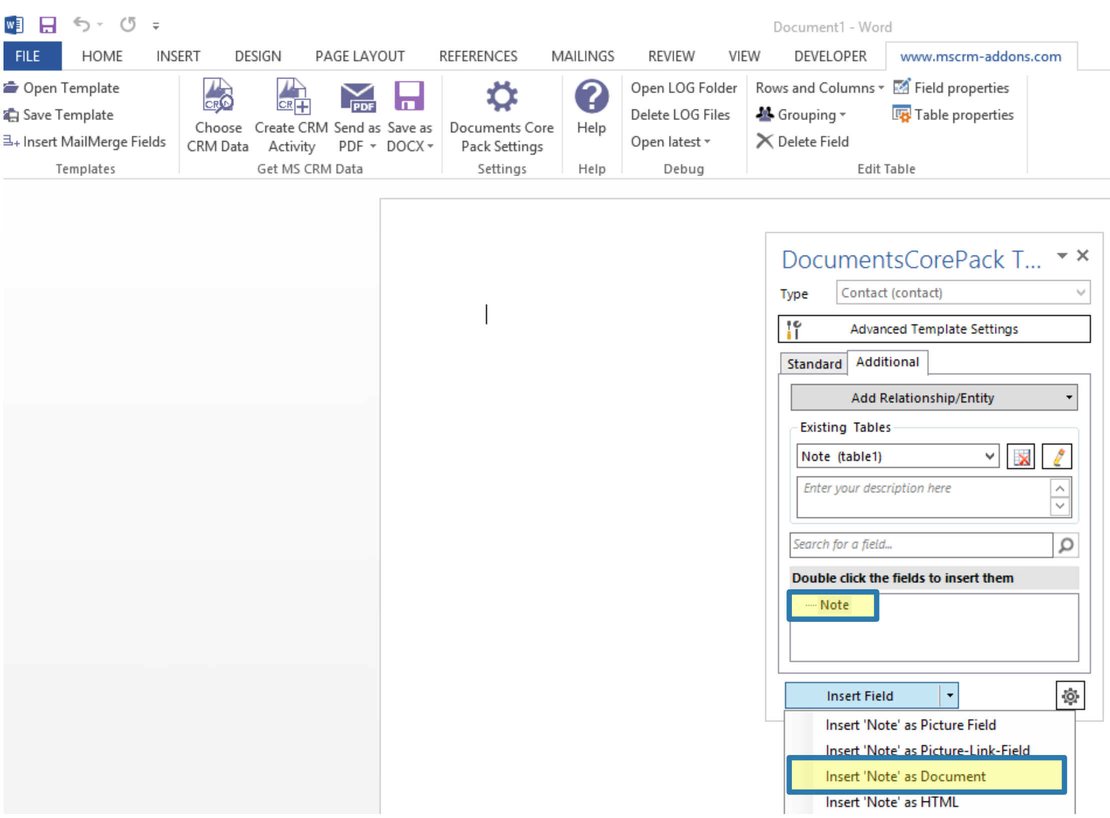


Figure 154: Additional Tab – Contact < > Note relationship – Insert as Document

You will be asked to select a source field for your embedded document. In our example, there is only one possible source field (Note) because we have only saved one document. But if you had saved more than one document, we could have selected our field source in this field. Click on the ***[OK]***-button in order to proceed.

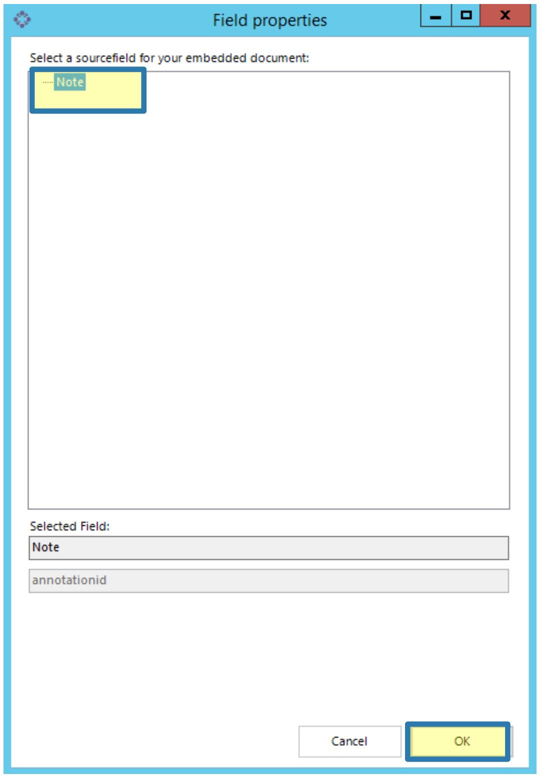


Figure 155: Field properties – insert note as source field

The next dialog allows you to decide whether you want to insert the newly generated relation field as a table or not. We decided to do so in our example (that is why we marked the option *Insert a new Table with a row per related record*, but you could as well use another option. SEE CHAPTER 5.1.4 STEP 3: INSERT THE TABLE, PAGE 102 for more information on how to format a table. However, click on the ***[OK]***-button in order to proceed.

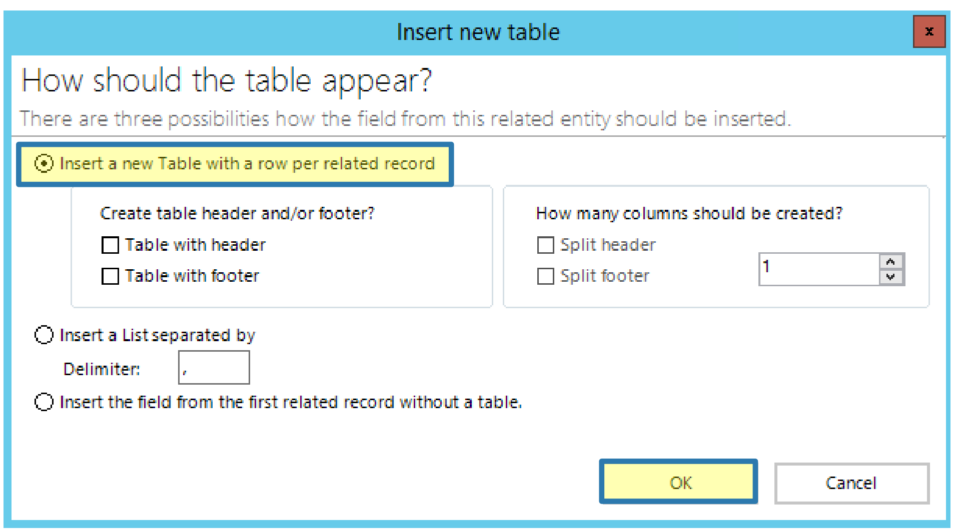


Figure 156: Insert document: Insert document as table or not?

That's it! You are provided with a placeholder and a table.

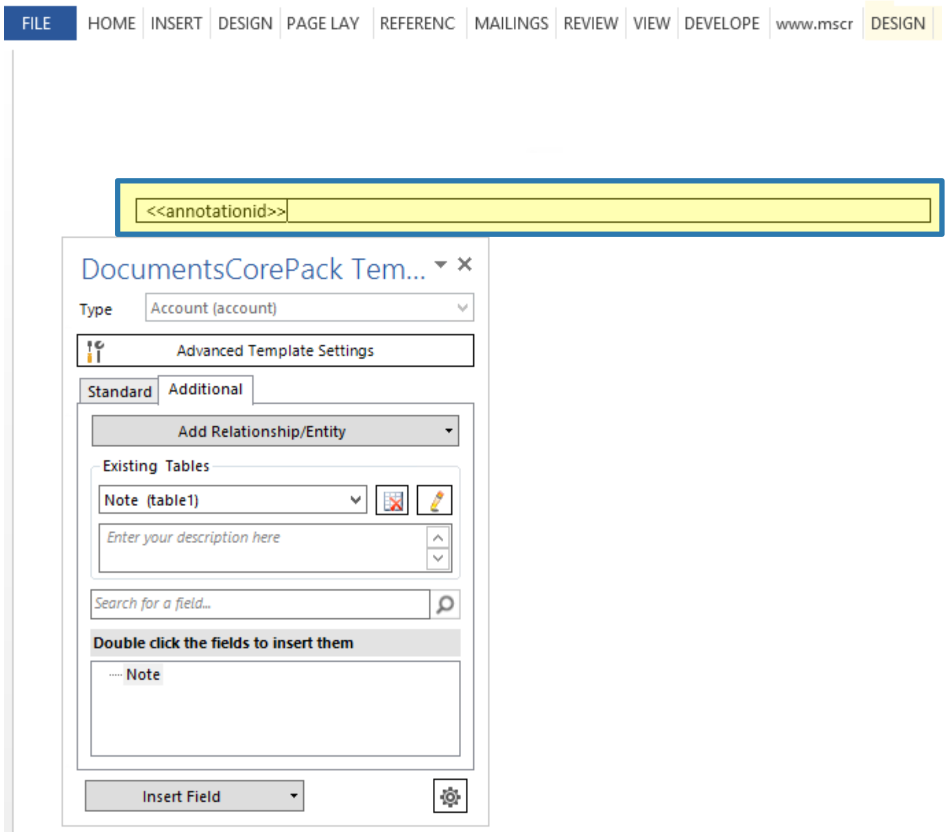


Figure 157: Insert document – placeholder

5.13 How to Insert as HTML

Before you can insert a field as HTML, you have to save the HTML code in your CRM.

CRM offers a field that is called 'HTML' description. You must save the HTML-code there.

Open the DocumentsCorePack Template Designer and select the entity you would like to work with, for example, *Account*. Now look for *HTML-description* in the Standard Tab. The best way to do this is via the search. Learn more about the search functionality in chapter 1.4.4 SEARCH WITH THE ATTRIBUTES TREEVIEW, PAGE 18.

Once you have found the field *HTML-description*, simply click on it and then click on the *Insert Field Drop Down Menu*. There, select the option Insert *'HTML_description' as HTML*. As soon as you have done so, a placeholder will be displayed in your document.

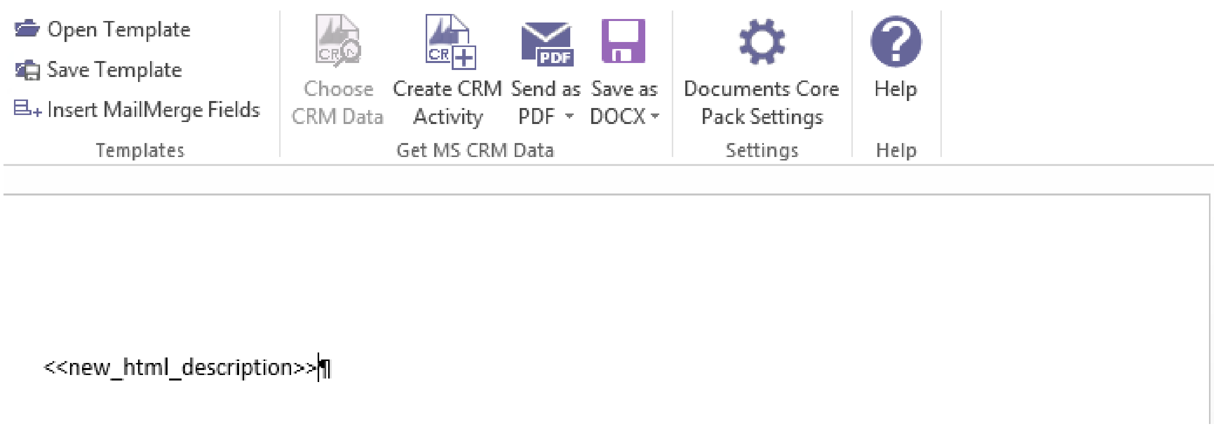


Figure 158: Insert HTML_description as HTML field

5.14 How to insert as static item

Insert Static Item contains the following submenus:

Static Document (See 5.15 How to insert as static document)
Page Break (See 5.16 How to insert Page Break)
Remove Empty Lines (See 5.17 How to insert Remove Empty Lines)
Join Tables (See 5.18 How to insert Join tables)

5.15 How to insert as static document

Before you can insert a field as static document, make sure that you have saved some documents before.

5.15.1 Use the *Insert static document* option

Select a type in the type selector of the standard tab, press *insert field*, hit *insert static document* and select *static document*.

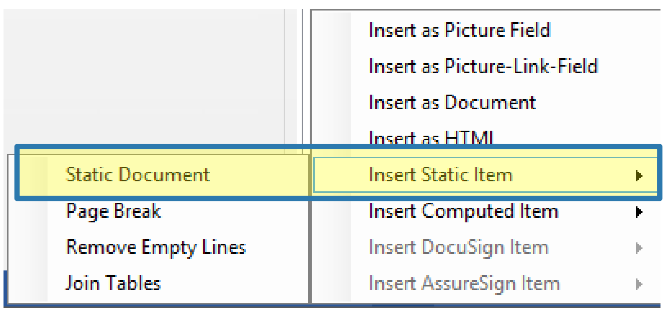


Figure 159: Insert static item drop down menu

5.15.2 Select a document to insert

At this point you have two options: You can either select a subtemplate and provide the necessary field as a merge parameter or you can skip this step and select a static document only (which does not require parameters for merging).

OPTIONAL: Provide a merge parameter

Select an ID-field from the *TreeView* (for example Contact) and check the *Provide the selected field as parameter*-checkbox.

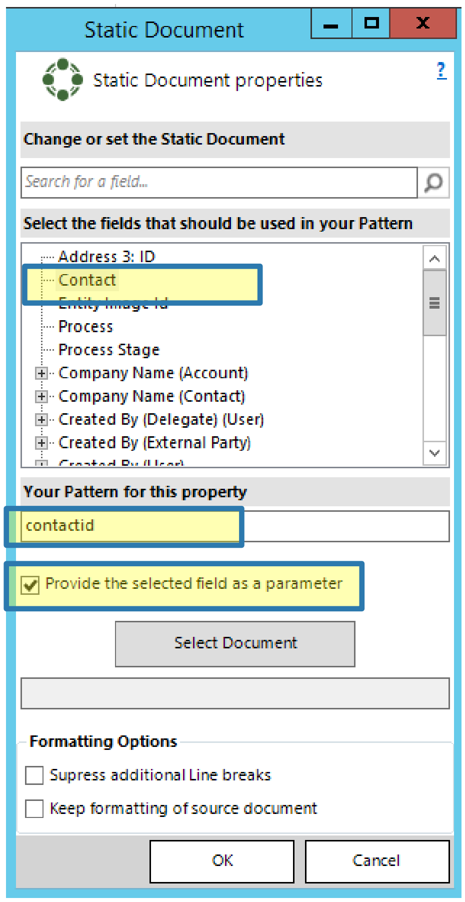


Figure 160: Static document properties – provide a parameter

If you do not want to provide the selected field as parameter, simply hit the ***[Select Document]***-button and select a subtemplate or a static document in the Look Up Record that opens afterward.

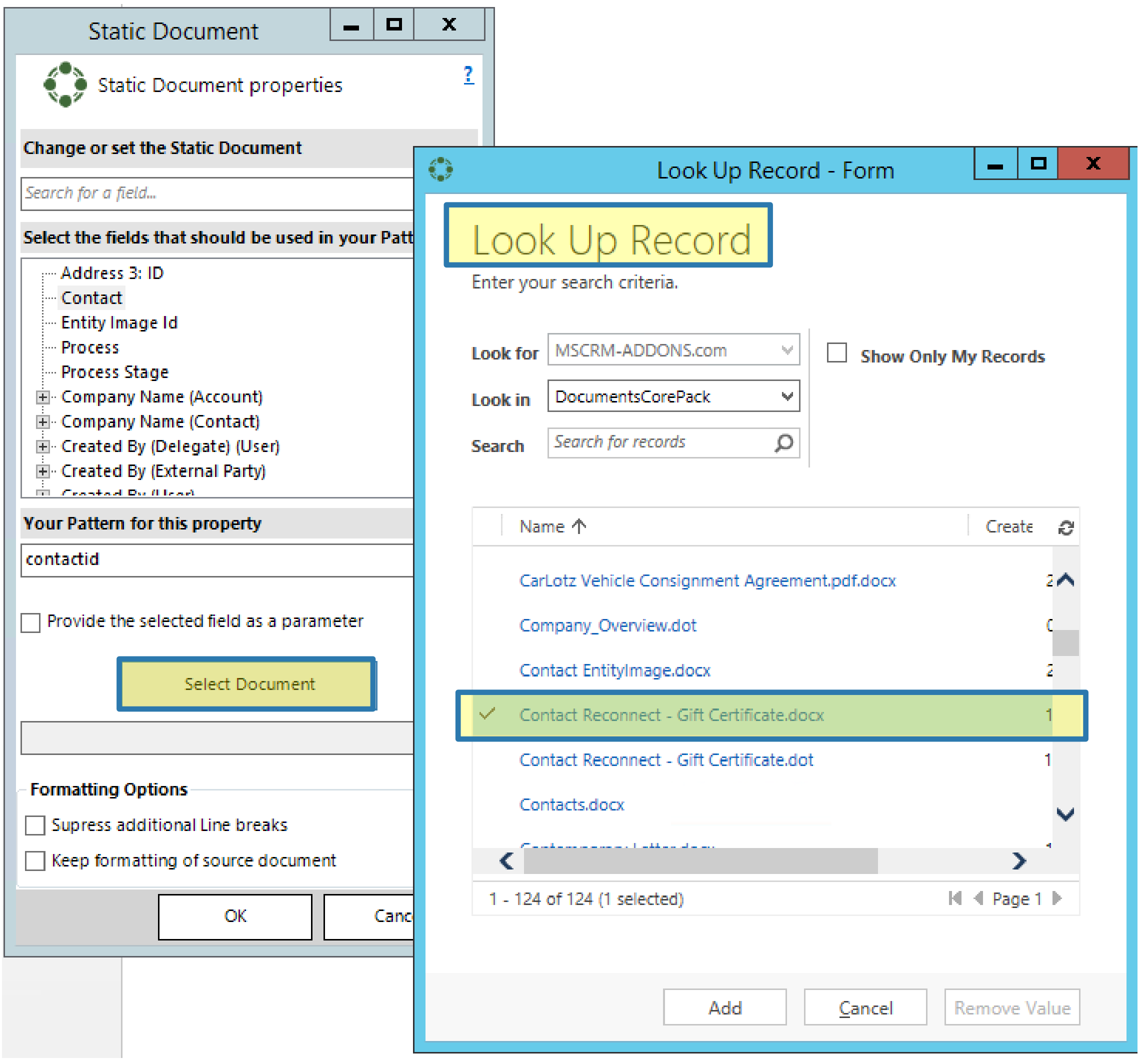


Figure 161: Click [Select Document] and a Look Up Record Dialog will open

5.15.3 Get the results

The name of the selected template is now to be seen in the new window. Click the ***[OK]***-button to apply the new window. To ensure that your future document has the desired formatting, the static document dialog provides you with two formatting options:

a) Suppress additional Line breaks (unnecessarily set line breaks will be suppressed)
b) Keep formatting of the source document (the source documents' formatting will be kept)

Make sure that you check the corresponding check box next to the formatting options in order to execute it on the future document.

Now – that's it!

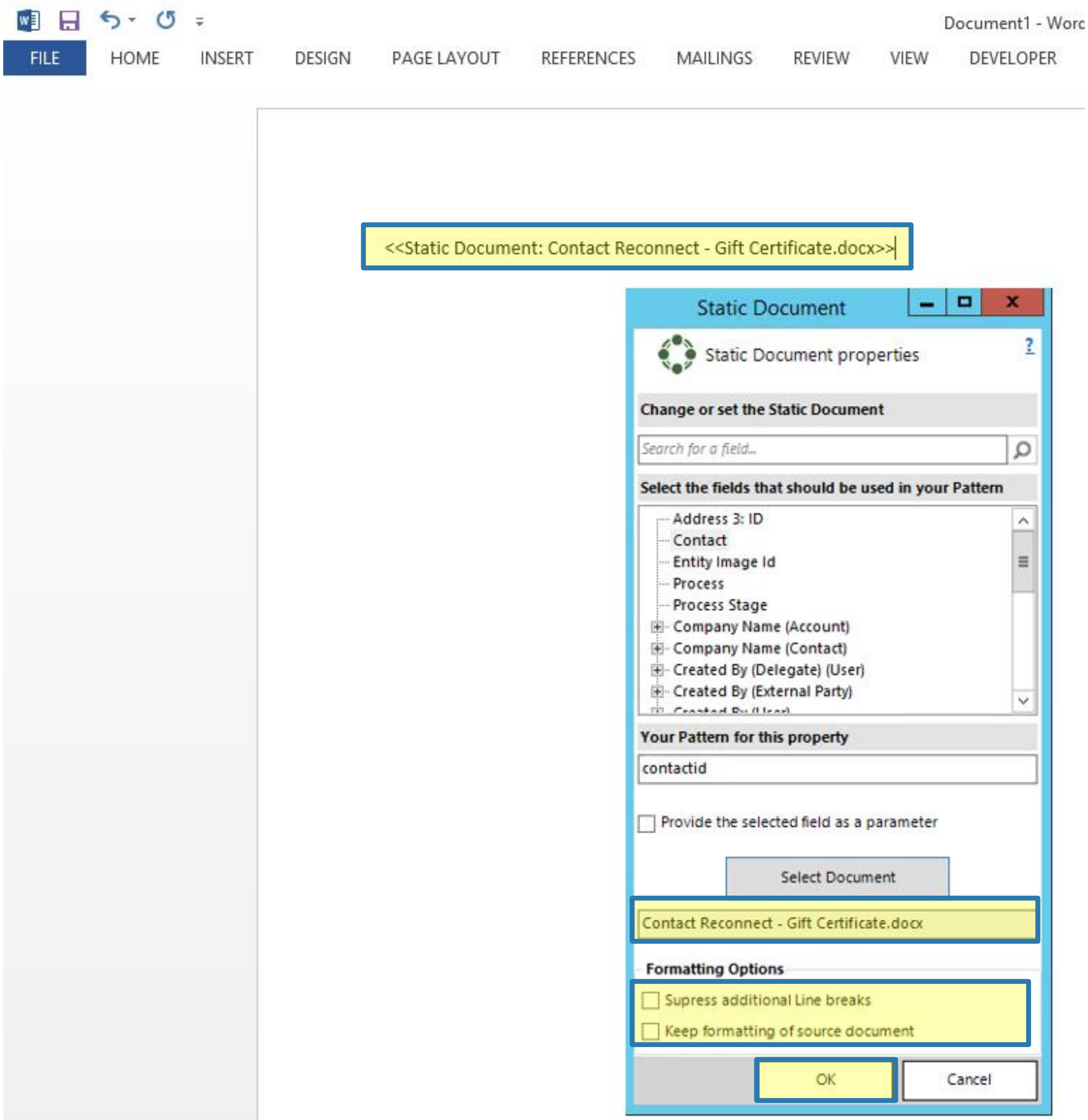


Figure 162: Insert static document dialog with result in the background

5.16 How to insert Page Break

In order to use this functionality to its full extends, you need to open an existing template or to create a new one.

5.16.1 Select the Page Break option in the insert fields drop-down menu

Please place your cursor where you want to have the page break. Now click on Page Break in the insert fields drop down menu and that's it! A placeholder is displayed until you merge the document.

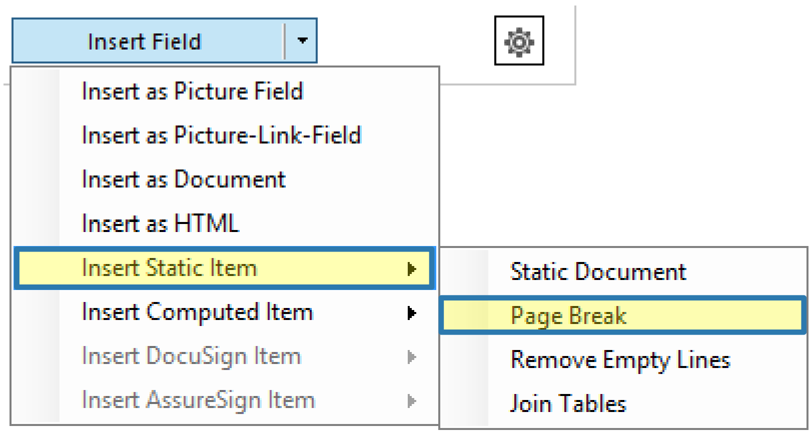


Figure 163: Select Page Break in the insert fields drop down menu

5.17 How to insert Remove Empty Lines

In order to use this functionality to its full extends, you need to open an existing template or to create a new one.

5.17.1 Select the Remove Empty Lines option in the insert fields drop-down menu

Please place your cursor where you want to have the empty lines removed. Now click on *Remove Empty Lines* in the *insert fields drop down menu* and that's it! A placeholder is displayed until you merge the document. As a result, every empty line is deleted, and the document is structured in a proper way.

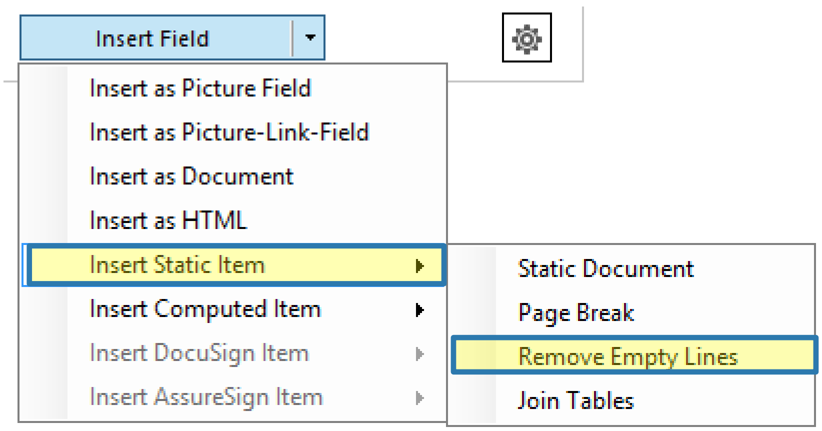


Figure 164: Select Remove Empty Lines in the insert fields drop down menu

5.18 How to insert Join tables

In order to use this functionality to its full extends, you need to open an existing template or to create a new one that includes a table.

5.18.1 Select the Join tables option in the insert fields drop-down menu

Please place your cursor where you want to have tables joined. Now click on *Join tables* in the *insert fields drop down menu* and that's it! A placeholder is displayed until you merge the document. As a result, tables are joined and structured in a proper way.

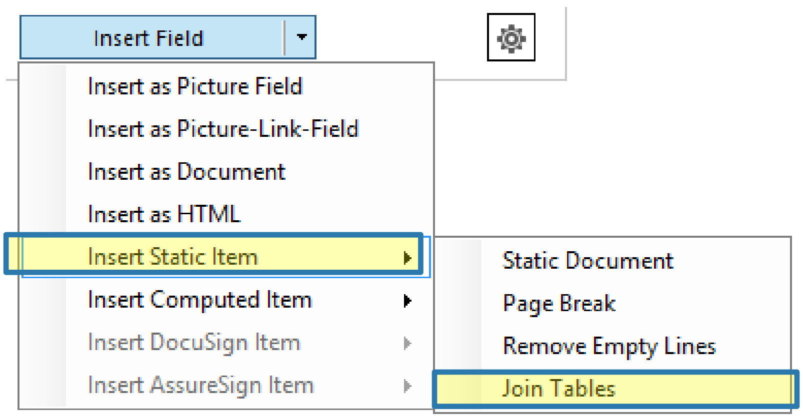


Figure 165: Select Join Tables in the insert fields drop down menu

5.19 How to insert computed items

"Insert Computed Item contains the following submenus:

QR Code (SEE CHAPTER 5.20 HOW TO INSERT QR CODES PAGE 157)
Advanced String (SEE CHAPTER 5.21 HOW TO INSERT AN ADVANCED STRING PAGE 159)
Calculated Field (SEE CHAPTER 5.22 HOW TO INSERT CALCULATED FIELDS PAGE 161)
Hyperlink (SEE CHAPTER 5.23 HOW TO INSERT HYPERLINK PAGE 163)
Condition field (SEE CHAPTER 5.24 HOW TO INSERT CONDITION FIELD PAGE 165)

It is crucial that the used CRM-fields contain numbers!

5.20 How to insert QR Codes

The following description will show you how to insert QR Codes properly.

5.20.1 Use the Insert computed item option

Press *insert field*, hit *insert computed item* and select *QR Code*.

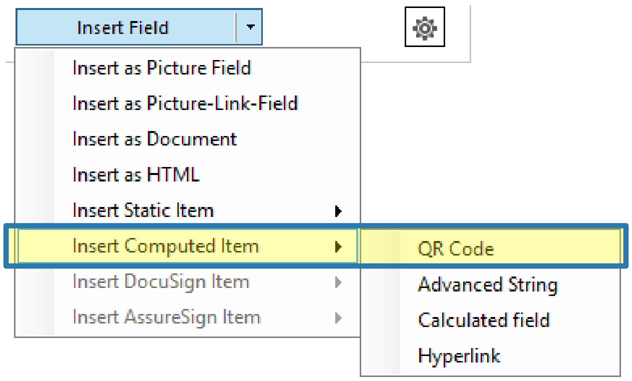


Figure 166: Select QR Code in the Insert Field section

5.20.2 Create a QR code

Define your QR code pattern. The used text will be transformed into a QR-code. The syntax for this field is described in chapter 3.1 DOCUMENTSCOREPACK CLIENT PROPERTY SYNTAX, PAGE 72.

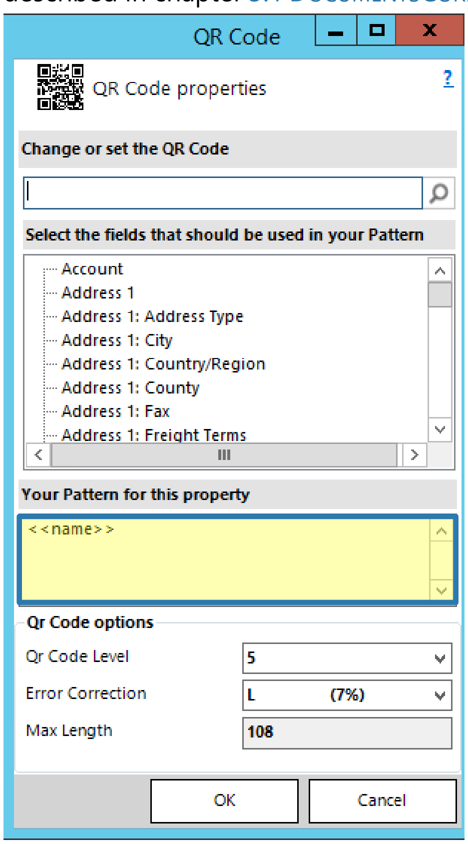


Figure 167: QR Code properties

5.20.3 QR Code options

The 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 signs that exceed the maximum length are cut.

The Error Correction
efines the capacity and fault tolerance of the QR-code. The value shows the amount that can be restored in percent.
The available options are:
- 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

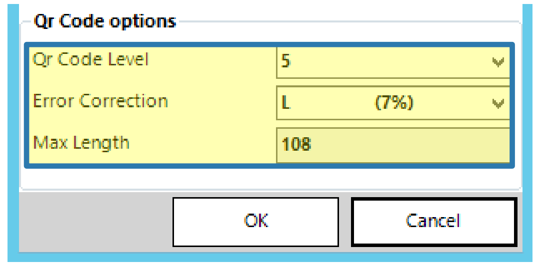


Figure 168: QR Code options

The Max Length is not editable and depends on the above settings.

5.20.4 Don’t forget to save your template

Click on the ***[OK]***-button in the *QR Code properties field* and you will be provided with a beautiful placeholder for your future QR-Code.

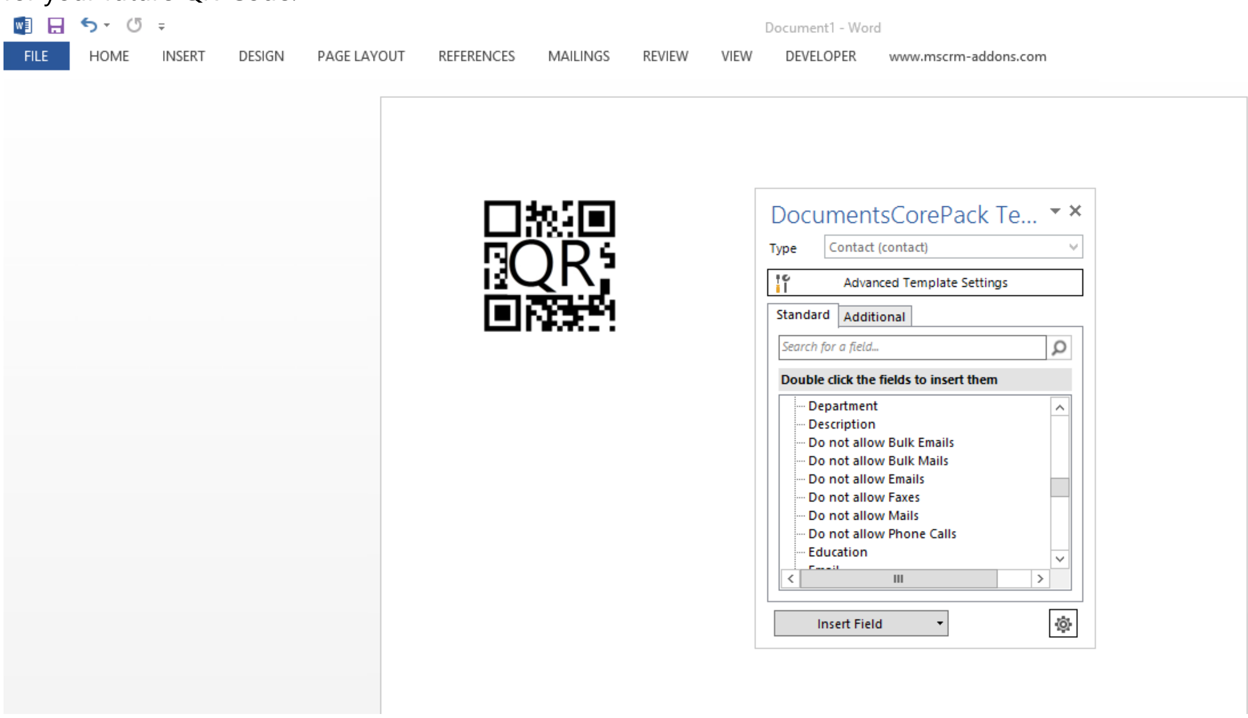


Figure 169: QR Code placeholder

5.21 How to insert an Advanced String

The following description will show you how to insert Advanced Strings properly.

5.21.1 Use the Insert Computed item option

Press *insert field*, hit *insert computed item* and select *Advanced String*.

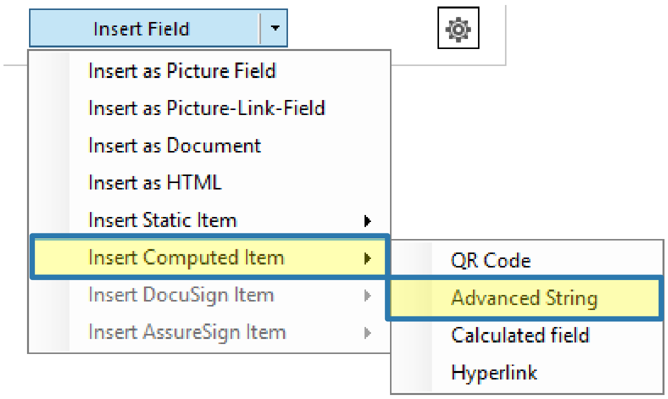
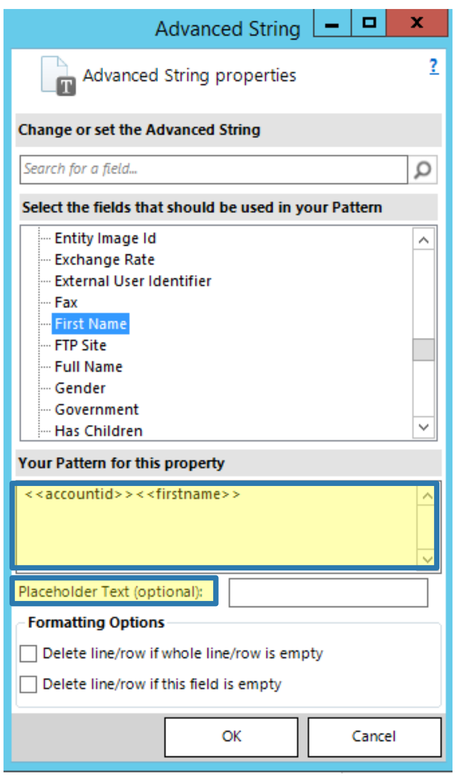


Figure 170: Select Advanced String in the Insert Field section

5.21.2 Create your Advanced String

Define your link pattern here. The used text will be transformed into an Advanced String. The syntax for this field is described in chapter 3.1 DOCUMENTSCOREPACK CLIENT PROPERTY SYNTAX, PAGE 72.



Optionally, you can set a placeholder name for your field (so the template is easier to find if you want to modify it in the future).

Figure 171: Advanced String properties

5.21.3 Advanced String formatting options

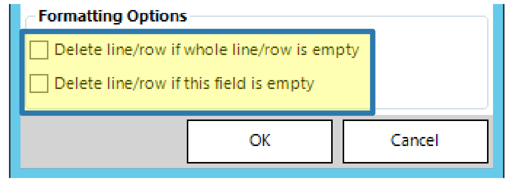


Figure 172: Advanced String formatting options

<u>Delete line/row if whole line/row is empty</u>
will delete each line/row that is empty if checked

<u>Delete line/row if this field is empty</u>
Will delete the whole line/row (no matter if empty or not) if this field is empty

5.21.4 Save your template

Click on the ***[OK]***-button in the *Advanced String properties field* and you will be provided with a beautiful placeholder for your future String.

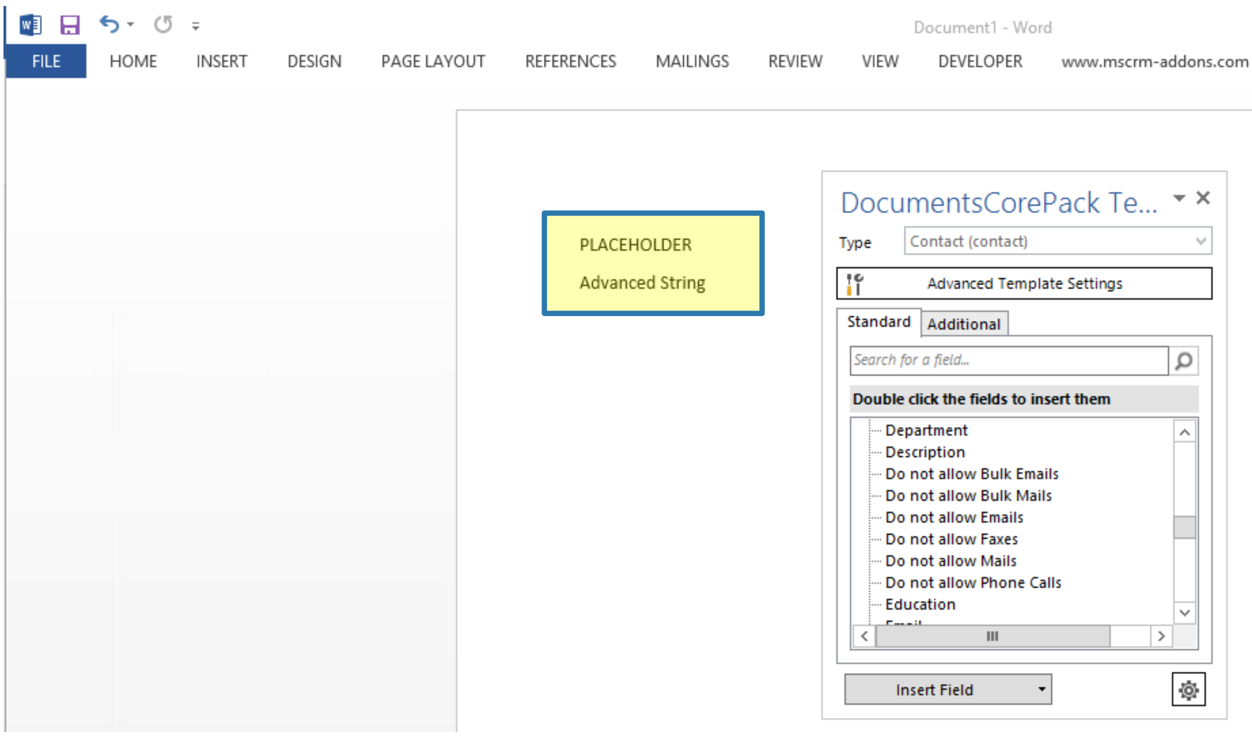


Figure 173: This shows two inserted advanced strings (one with PLACEHOLDER function, one without)

5.22 How to insert Calculated Fields

Calculated fields allow you to do calculations based on CRM data.

5.22.1 Use the insert computed field option

Press *insert field*, hit *insert computed item* and select *Calculated field*.

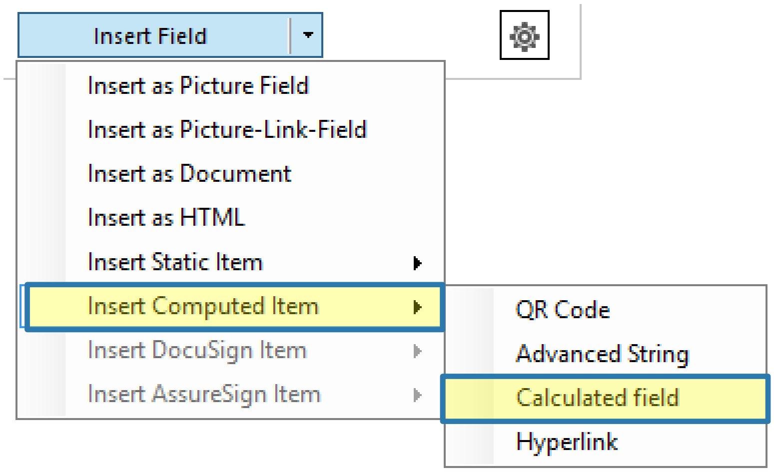


Figure 174: Select Calculated field in the Insert Field section

5.22.2 Create your calculation

Define your calculation pattern. The syntax for this field supports the basic arithmetic operations. Other than the usual DocumentsCorePack syntax, numeric values are added without single quotes. For further information on the syntax, please have a look at chapter 3.1 DocumentsCorePack Client Property Syntax, page 72.

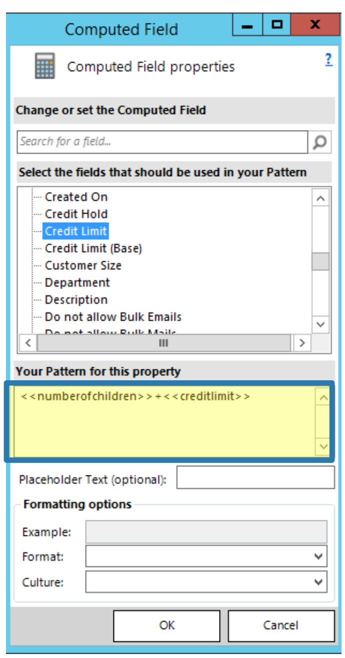


Figure 175: Computed field properties - insert calculation

5.22.3 Additional options

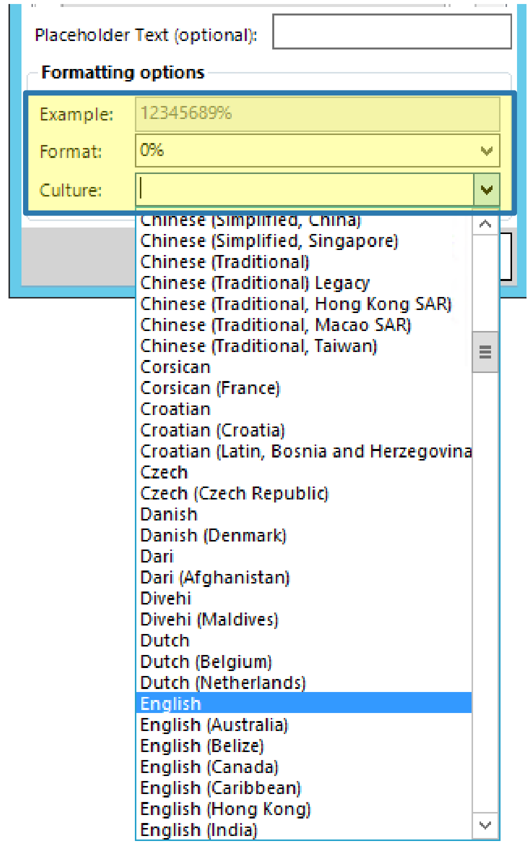


Figure 176: Formatting options

<u>Placeholder Text</u>

Optionally, you can set a placeholder name for your field (so the template is easier to find if you want to modify it in the future).

<u>Example</u>

In the example field, an example is shown that includes your selected formatting options.

<u>Format</u>

Applies a special format to your calculation (for example, a certain percentage)

<u>Culture</u>

Applies a certain culture to your calculation

5.22.4 Save your template

Click on the ***[OK]***-button in the *Computed field properties field* and you will be provided with your calculated field.

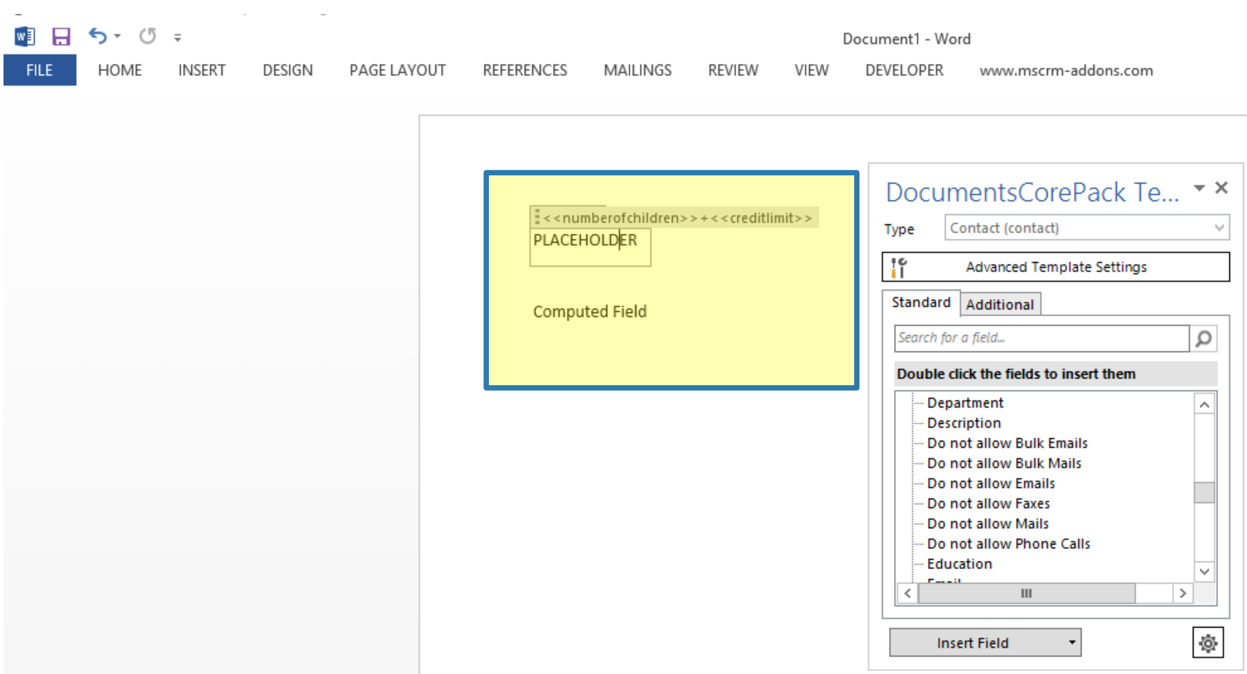


Figure 177: This shows two inserted calculated fields (one with PLACEHOLDER function, one without)

5.23 How to insert Hyperlink

This option allows you to define a pattern for a dynamically created link.

5.23.1 Use the insert computed item option

Press *insert field*, hit *insert computed item* and select *Hyperlink*.

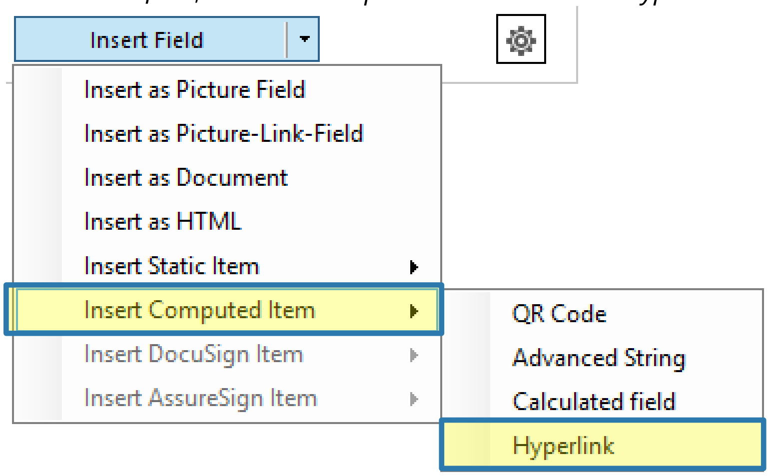


Figure 178: Select Hyperlink in the Insert Field section

5.23.2 Compose your link

Select the Link tab and define your Hyperlink pattern. For further information on the syntax, please have a look at chapter 3.1 DocumentsCorePack Client Property Syntax, page 72.

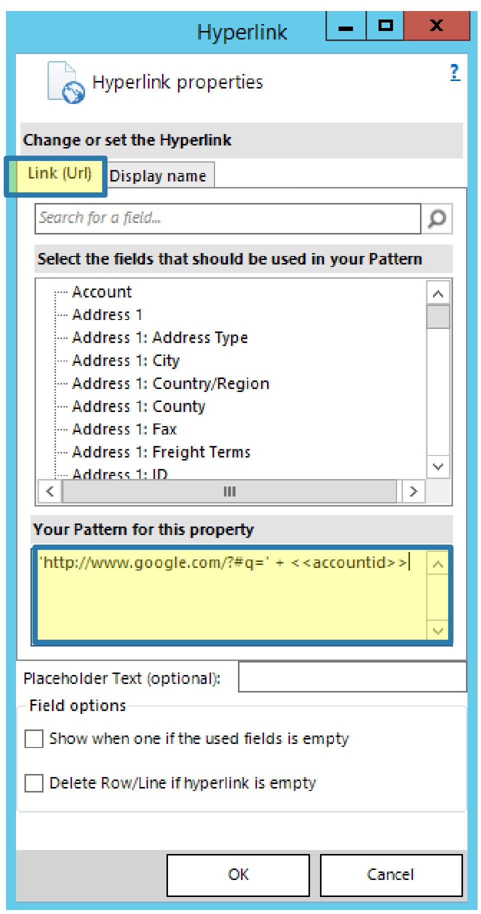


Figure 179: Hyperlink properties window

5.23.3 Additional options

<u>Placeholder Text</u>

Optionally, you can set a placeholder name for your field (so the template is easier to find if you want to modify it in the future).

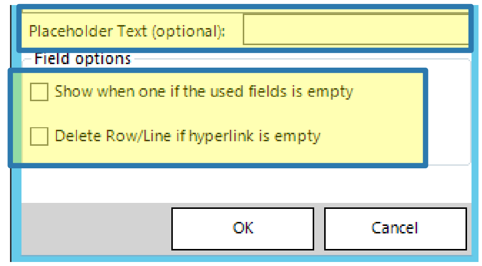


Figure 180: Additional hyperlink options

<u>Show when one if the used fields is empty</u>

Display the link even if one of the fields does not return data

<u>Delete Row/Line if the hyperlink is empty</u>

Remove the link completely if there is no data returned.

5.23.4 Don’t forget to save your template

Click on the ***[OK]***-button in the *Hyperlink properties field* and you will be provided with the result.

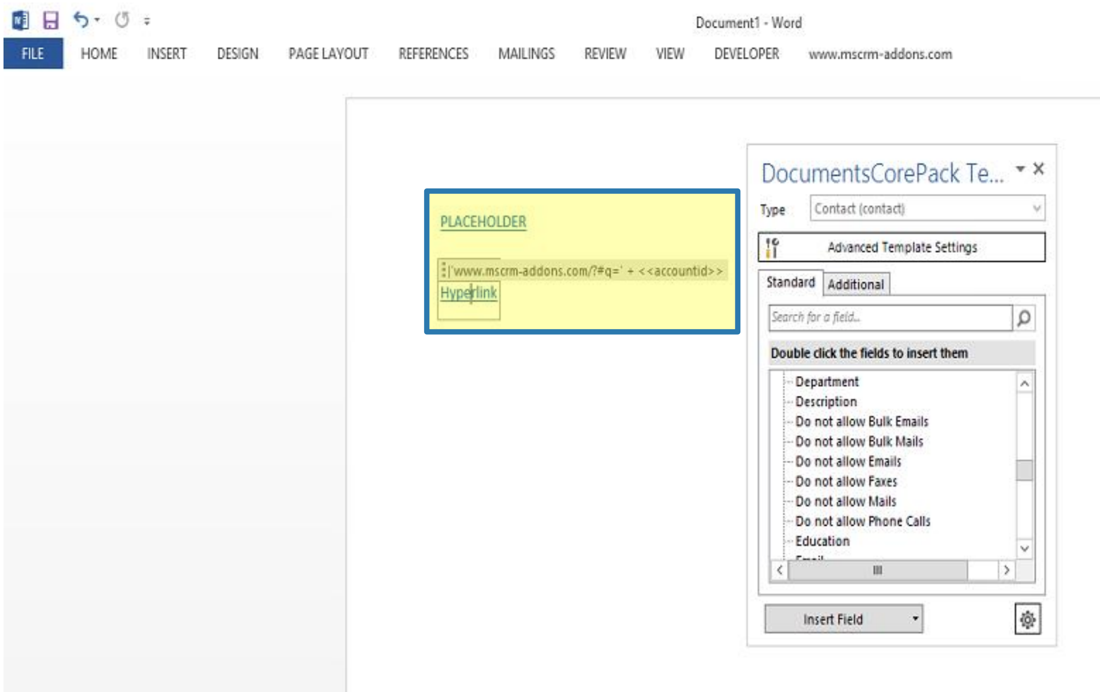


Figure 181: This shows two inserted hyperlinks: One with the PLACEHOLDER function, one without.

5.24 How to insert Condition field

Condition fields allow you to define dynamic content that is either displayed or removed from the final document based on a certain condition.

5.24.1 Use the insert computed item option

Press *Insert Field*, hit *Insert Computed Item* and select *Condition field*.

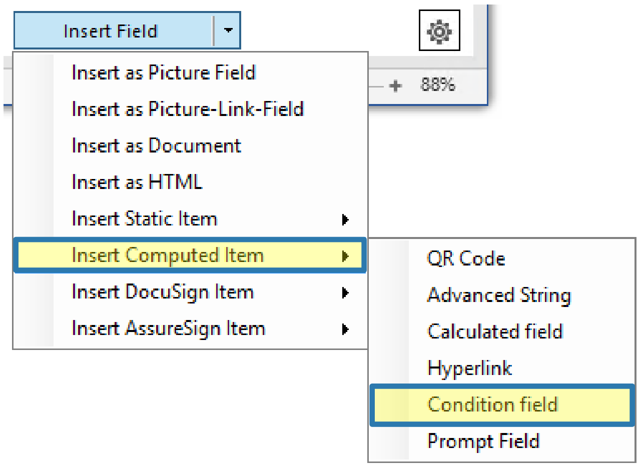
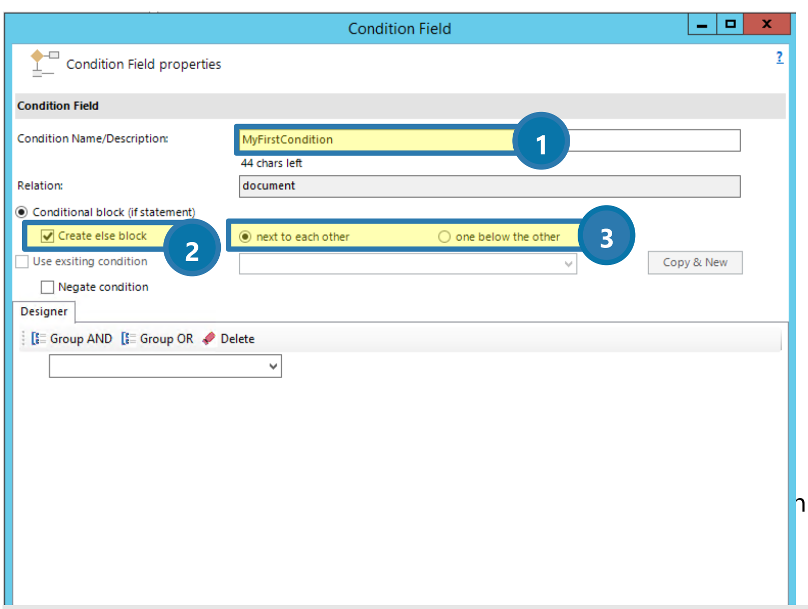


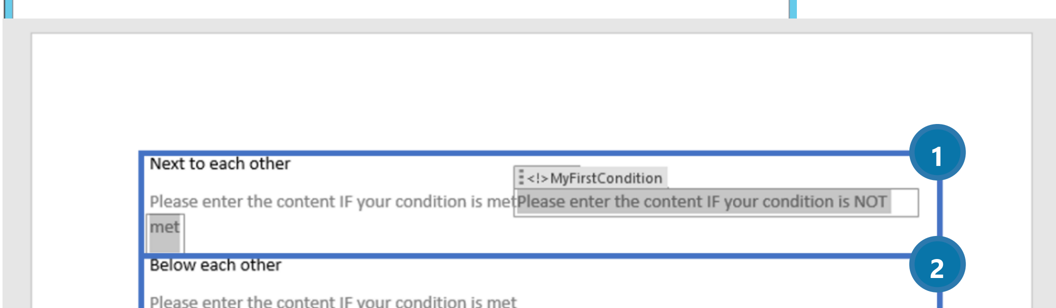
Figure 182: Select Condition field in the Insert Field section

5.24.2 Configure the setup of your condition fields

Give your condition a ① descriptive name to make it easy to re-use existing conditions in a template. Enable or disable ② the automatic creation of an else block. If an else block is created you can define ③ the layout of the inserted condition fields.



n using an else block. The else block is



An else block is always the negated version of your real condition. You always can identify such an element by the prefix “<!>” before the actual name.

5.24.3 Create your condition with the condition designer

The condition designer has a similar look and feel like the Advanced find in Dynamics 365. A more detailed description about the condition can be found in CHAPTER 3.1.4 CONDITION DESIGNER ON PAGE 76.

After you applied with [OK], a placeholder (Content Control) with the name of your condition is inserted. This is the “IF” block, if you also selected to insert an “ELSE” block you will find a second placeholder. Within this placeholder, you can set your custom text block, like you can see in the figure below.

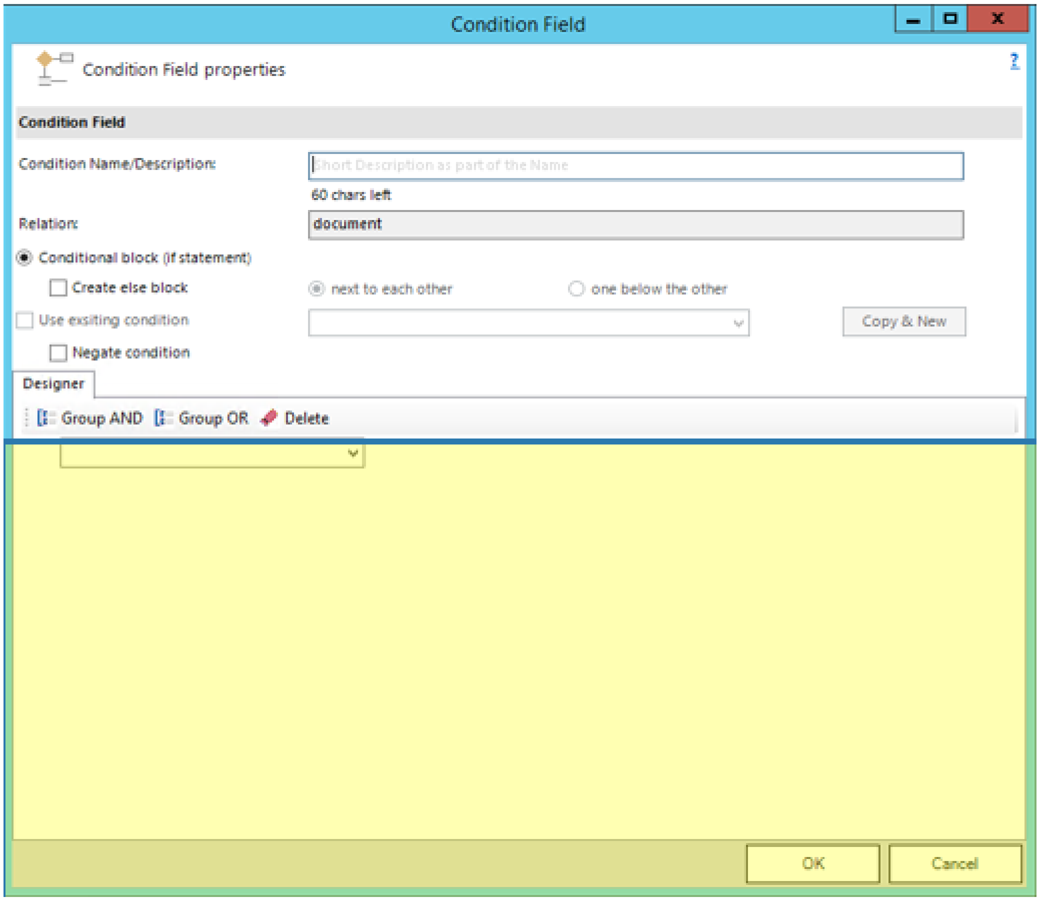


Figure 185: Condition Field Properties

Figure 186: Two placeholder in the template

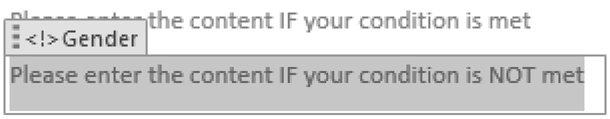


Figure 187: An "ELSE" block or a negated Condition always starts with <!>

5.24.4 Special functionalities

❶ RE-USE AN ALREADY EXISTING CONDITION

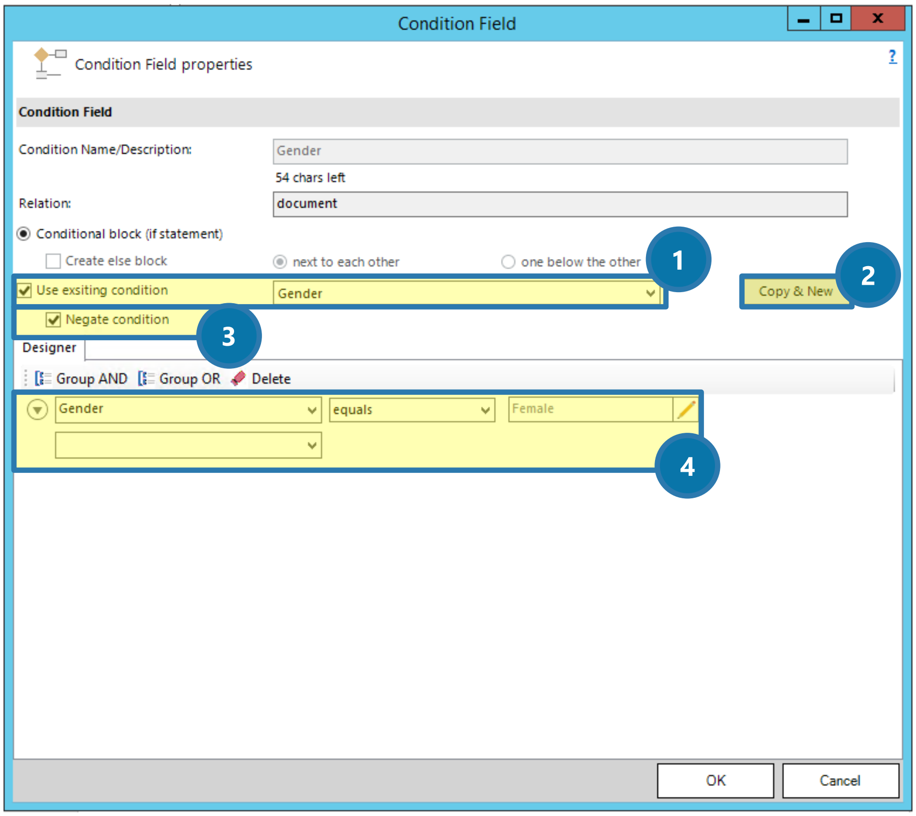
Use an existing condition, allows you to use the same condition for several fields in the template. So also, if you change the condition ❹, it will be applied to all other fields that use the condition with the same name.

❷ COPY AN EXISTING CONDITION

If you have variations of the same condition in your template, you can use "Copy and New" on existing conditions. This action will create a new condition that does not share the condition with other fields you have already inserted.

❸ NEGATE CONDITION

This option inverts a condition. Each automatically inserted else block is the inverted version of your created condition.



v

Figure 188: Special functionalities

5.24.5 Save your template

Before you can use or test your template you have to save it. Either you save your template locally with the standard Save or Save as the functionality of Word or you use the Save template-option of the DocumentsCorePack client in order to publish the template to Dynamics 365.

5.24.6 Test your template [optional]

As you have made changes to your template you might want to test them quickly. A description can be found in CHAPTER 5.3 HOW TO TEST YOUR TEMPLATE ON PAGE 114.

Please also find a step-by-step description which shows how to set a condition that choose between Mr and Ms depending on the gender.

5.25 How to do Conditional Formatting

The Conditional Formatting is an additional feature to the Condition functionality of DCP. While the standard Condition functionality either removes or keeps a field on your document the conditional formatting keeps the current format or applies a different format based on a Word style sheet. The description of the normal condition functionality can be found here.
This functionality requires version 9.24 or higher of the client and version 2017.169 of the server (or service).

5.25.1 Insert a new Condition Field

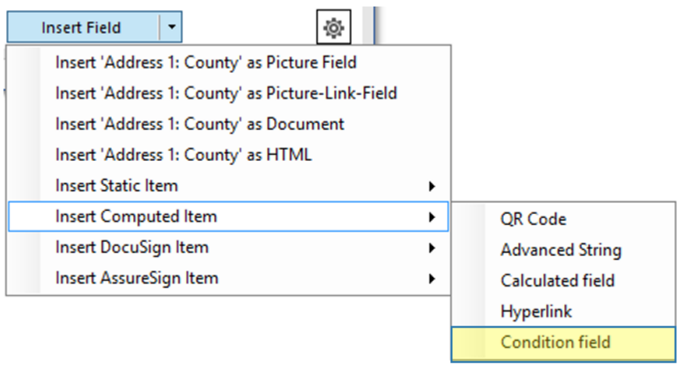


Figure 189: Insert Condition field

If you are not sure how to get to the insert fields option, please take a look at this article first.

5.25.2 Give your condition a descriptive name

A descriptive name makes it easy to re-use existing conditions in a template.

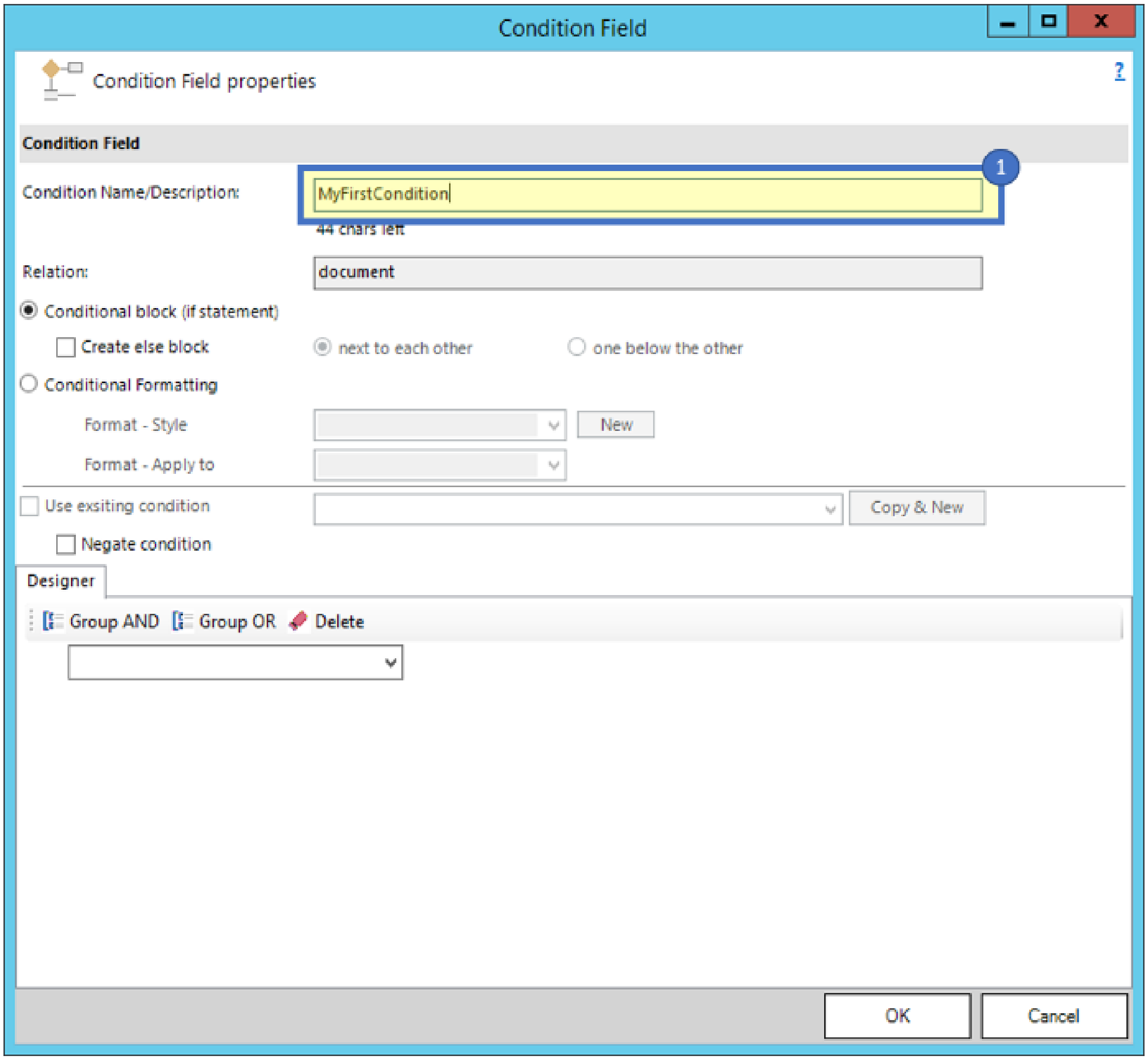


Figure 190: Condition Field-dialog

5.25.3 Select "Conditional formatting"

You have to switch the condition type from Conditional block (if statement) to Conditional Formatting (1).

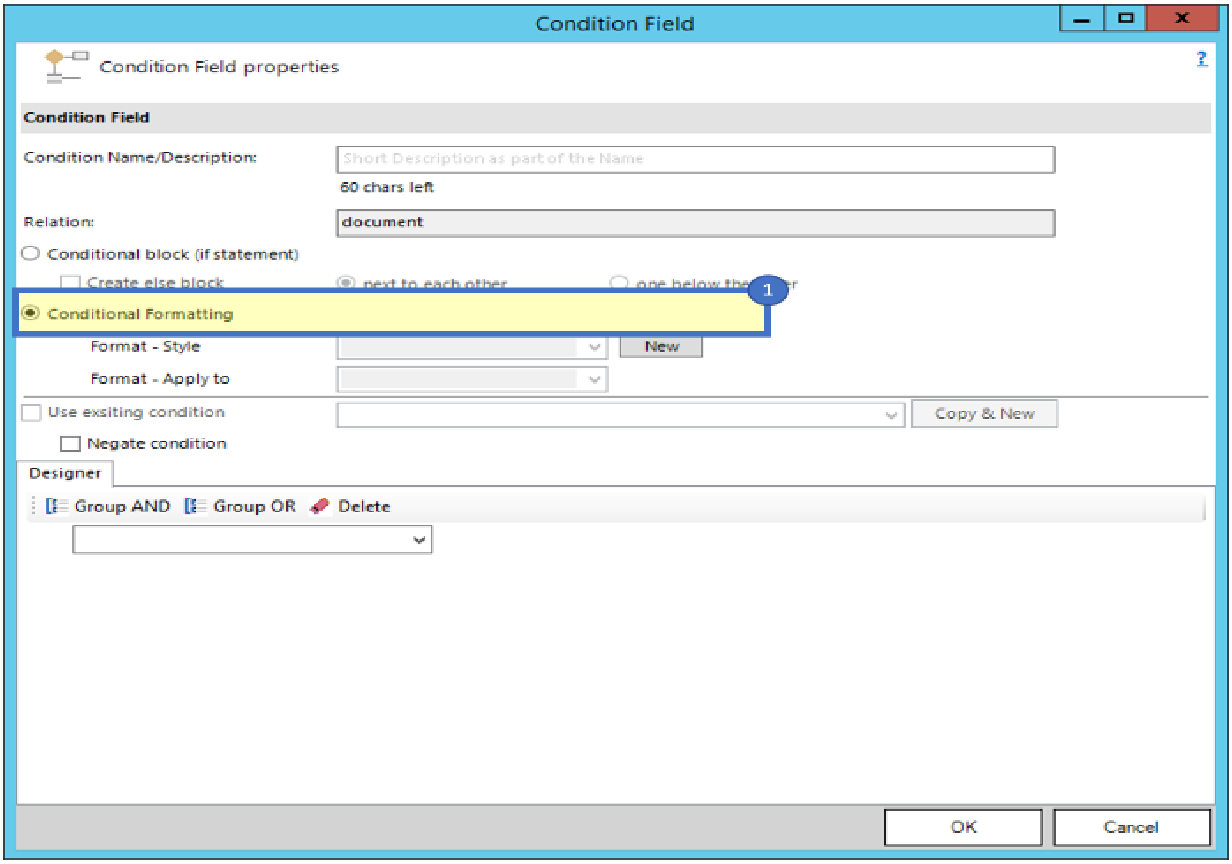


Figure 191: Conditional Formatting

If you do not see this option, please ensure you are having the required version installed. How to check your current version is described [here](#).

5.25.4 Style selection

After you have selected the conditional formatting you can use the style section (1). You only can use custom styles in this selection, so if the dropdown is not enabled you have to create a least a new style as described in the next step.

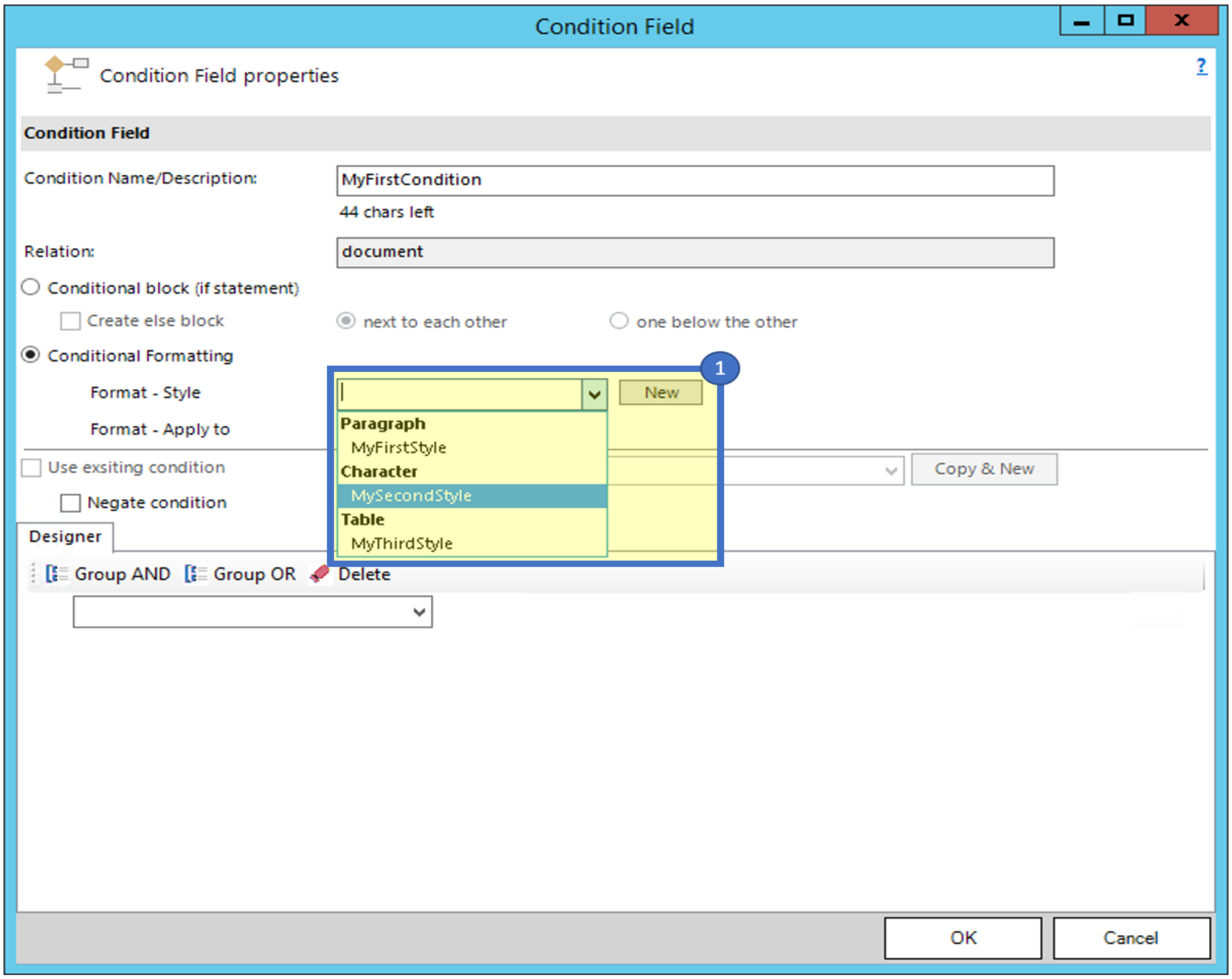


Figure 192: Section for style selection

5.25.5 Create new style

This will bring up the standard word [*Create New Style from Formatting*]–dialog.

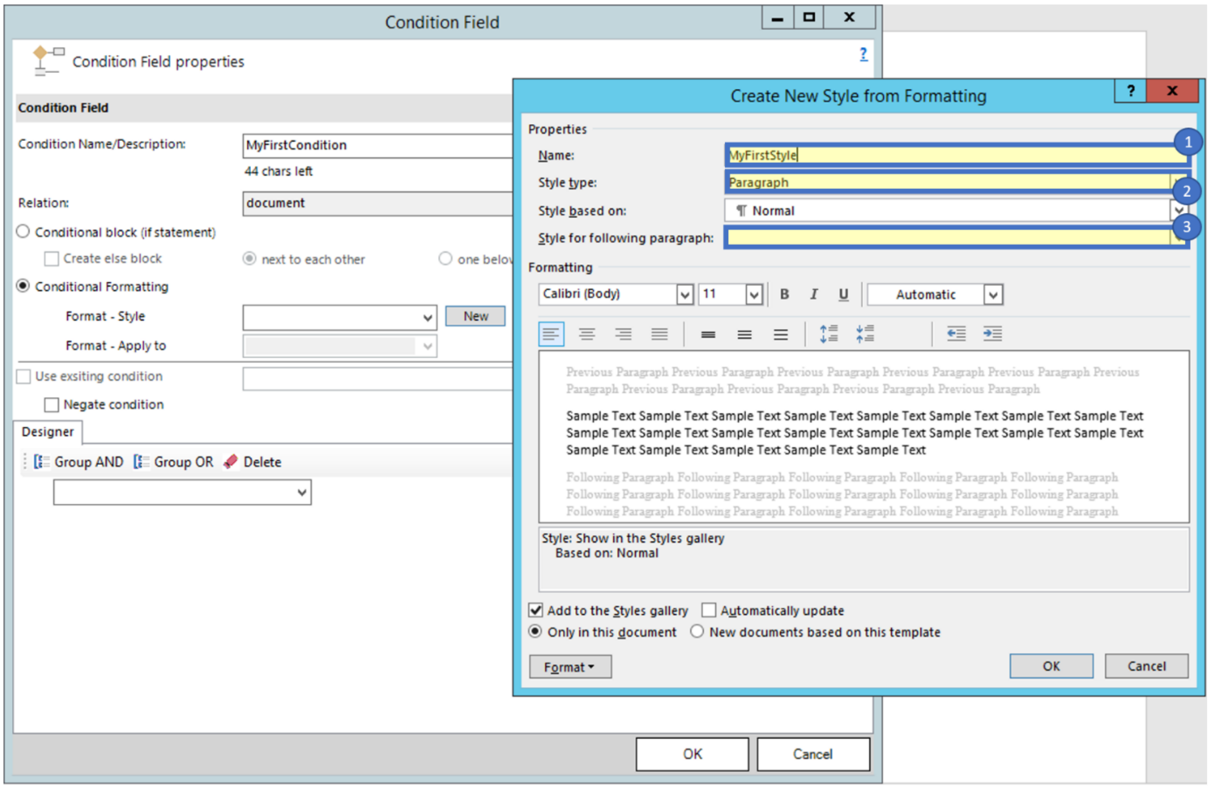


Figure 193: Create New Style from Formatting-dialog

This are the options of the "Create New Style from Formatting" - dialog:

❶ Name: Please define a name that will indicate what this style is used for. (You can re-use styles for all your conditions)
❷ Style type: This is one of the most important steps during the creation of a Style.
Within this selection field, you have 3 out of 5 options which are supported by us and these options are:

- **Paragraph -** The style will be applied to the whole Paragraph which contains this condition field
- **Character -** The style will be applied to the content within this condition field. It can a single word in a paragraph.
- **Table -** This style type will enable the second selection field [Format – Apply to] where you can decide how it should be applied.

❸ Style based on: A base style template can be selected to create the custom style based on an existing style.

Besides these three settings, you can use all given options to create your desired output style.
After you have chosen your wanted style, click on [OK] to save it.

Do not change name of the style because there is no option to identify a change of the name and the condition will no longer be able to find the style.
Not all available options in the standard style sheet configuration of Word are applicable. It depends on the used style and the context.

5.25.6 Select your Style

Since you have created your style, the [Format – Style] - selection is now enabled.

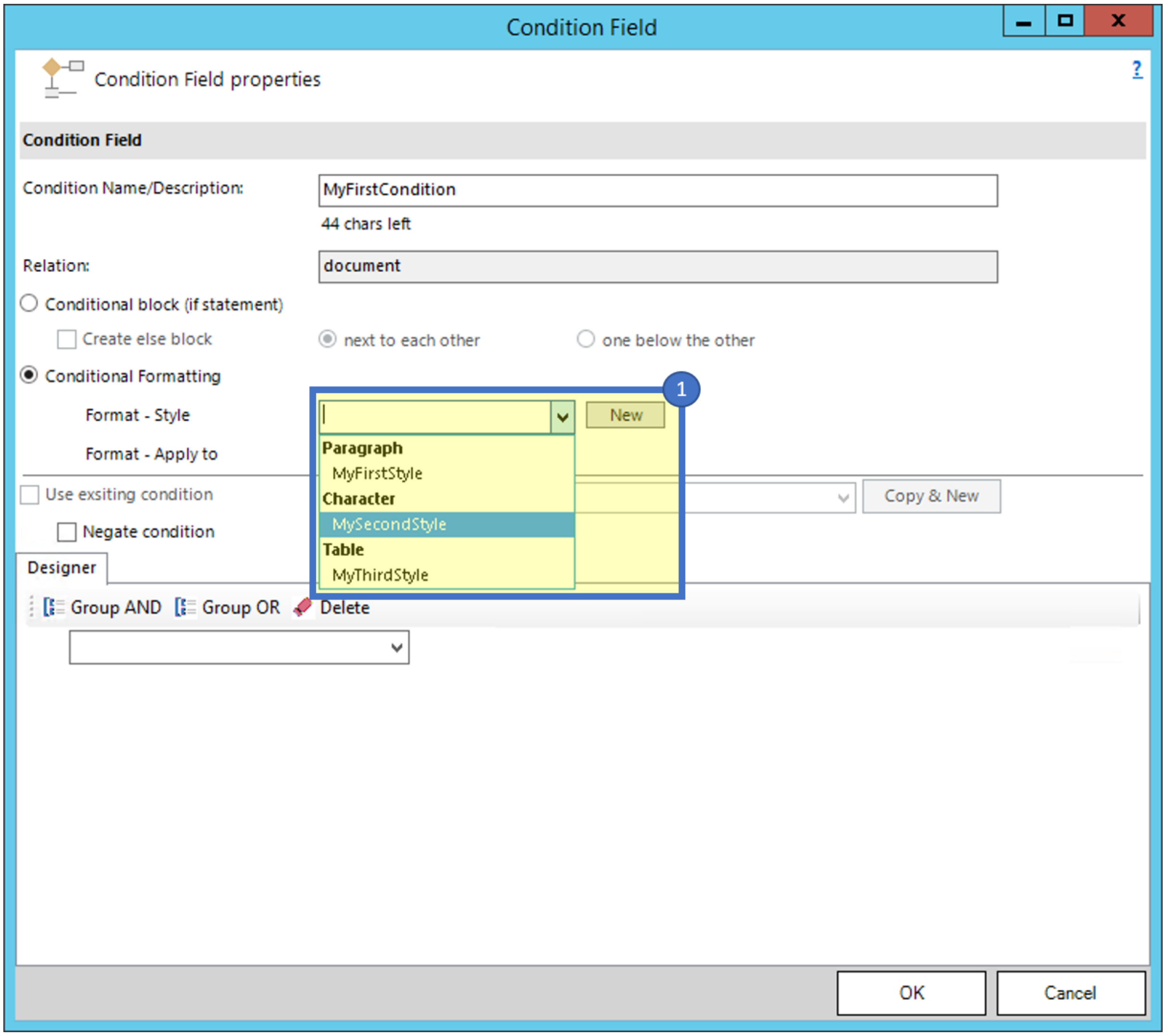


Figure 194: Enabled Format Style-selection

Choose your style and your conditional formatting field is ready to use.

5.25.7 Apply table format

If you selected a table in the "Format – style", the "Format – Apply to" - field gets enabled. This provides you the possibility to pick one out four ways how your table style should be applied.
This provides you the possibility to choose out of four different opportunities how your table style should be applied.

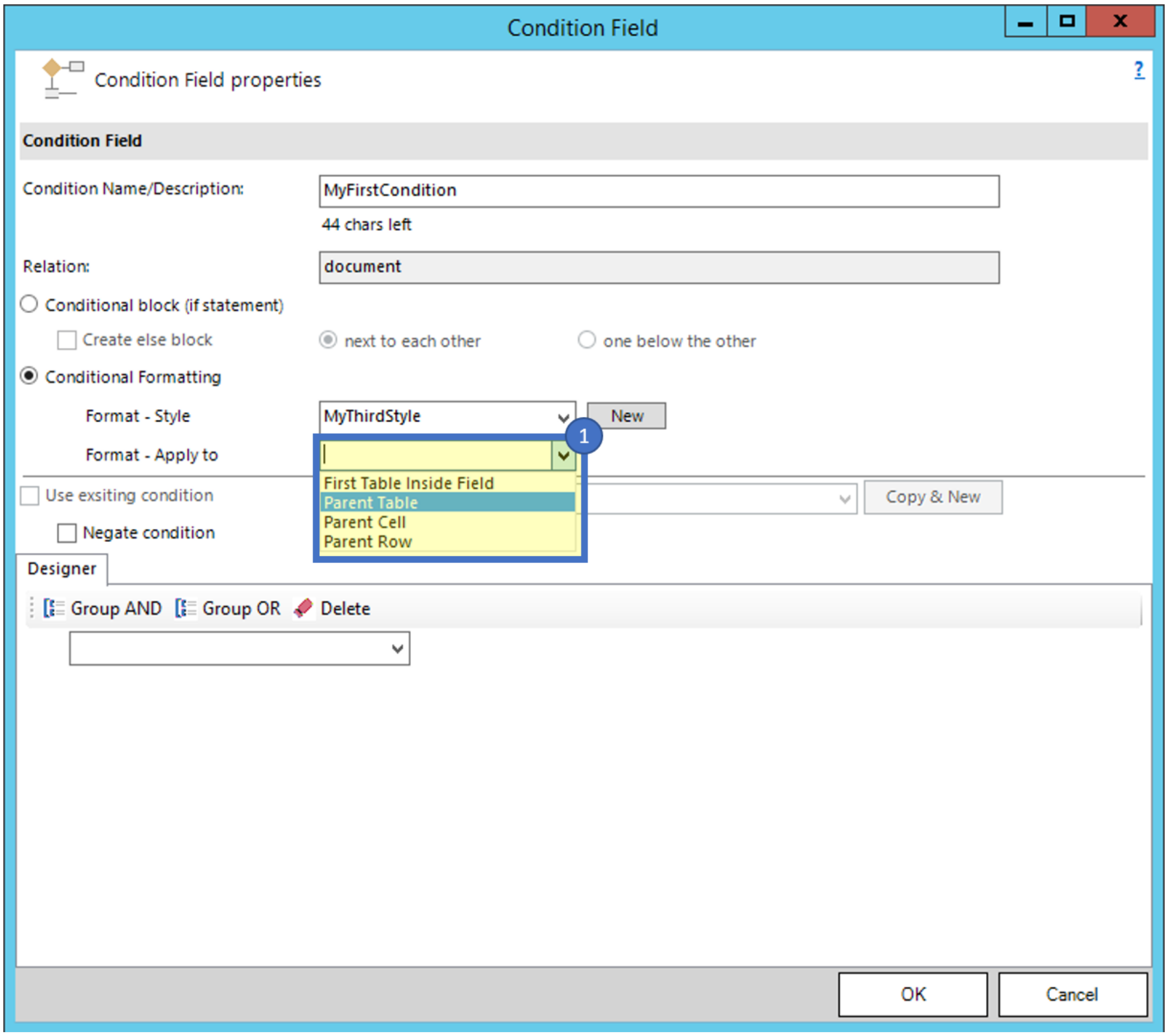


Figure 195: Condition field Format-Apply to

- **First Table Inside Field:** This option will apply your style to the first table in your condition field.
- **Parent Table:** When your condition field is within a table, this option will apply the style to this table.
- **Parent Cell:** The selected style will be applied to the cell which contains your condition field.
- **Parent Row:** The selected style will be applied to the row which contains your condition field.

5.25.8 Please click on [OK] to insert the condition field

This is how you do Conditional Formatting.

5.26 How to handle the Date Time Field

The *DateTime* option allows you to perform basic calculations with dates. You can add a certain amount of time to an existing date, or you can calculate the difference between two given dates. The following step by step description will show you how to insert a field of this type into your template.

5.26.1 Step by step description

This description outlines how to add a DateTime field into a DCP template by using the given insert options.

This feature can only be used within DCP templates, so please open your existing template or create a new one before using this feature. (Here is a blog that explains how to create a new template)

5.26.2 Open the [Insert Fields] – dialog

After you successfully opened your template, we can start to take a closer look at the modified Insert dialog. So please open the ***[Insert Fields]***-button and navigate to the "*Insert Computed Items*"-section 1.

Within that section, you should be able to spot the new ***[DateTime Field]***-button 2.

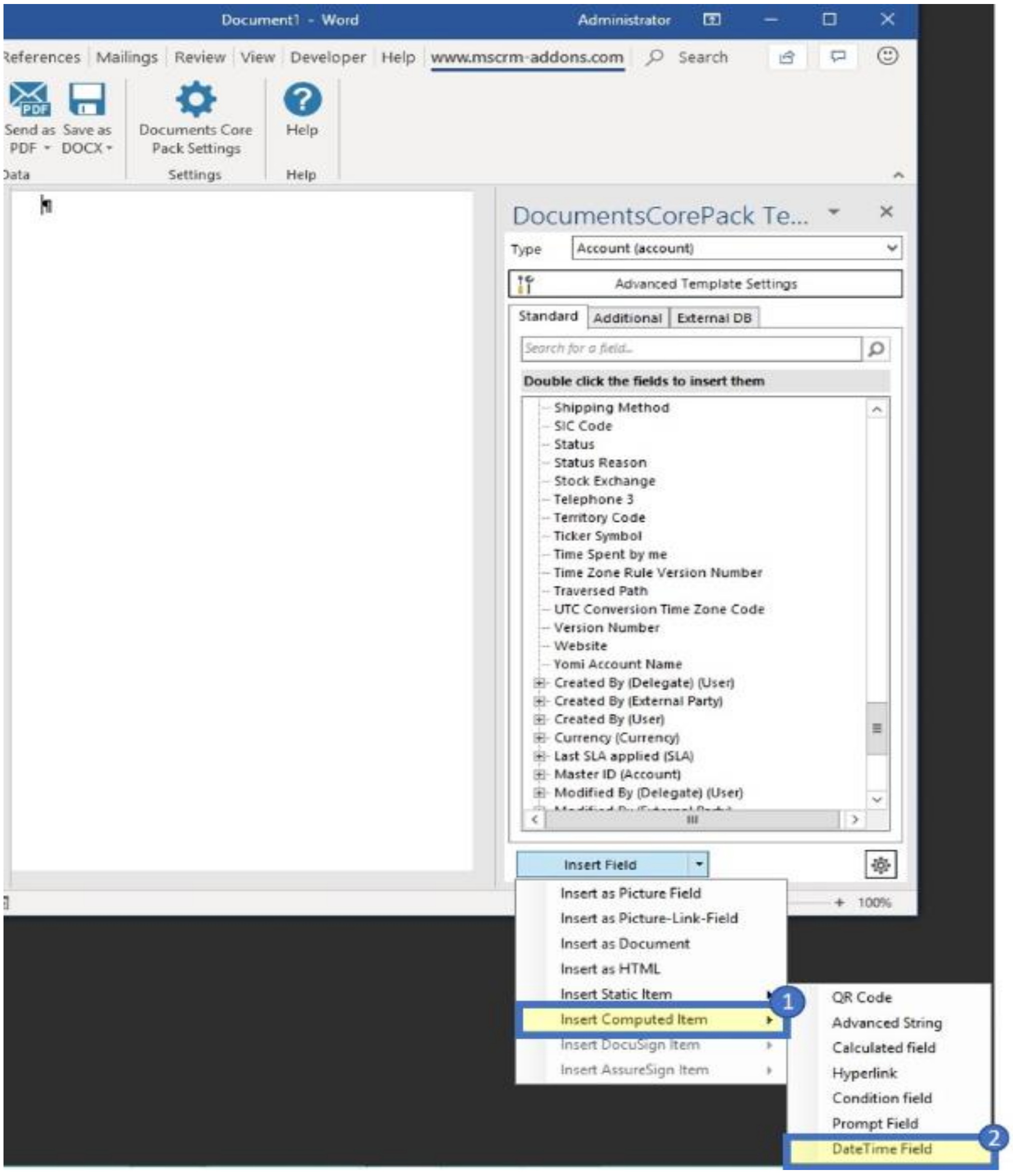


Figure 196: Insert Field Dialog

If you are not familiar with the ***[Insert Field]***-button you can start your research here.

5.26.3 The [DateTime Field] – dialog

Please click on the ***[DateTime Field]***-Button to open up the *DateTime* - dialog. This dialog gives you the possibility to specify your *DateTime Field* based on the given options.

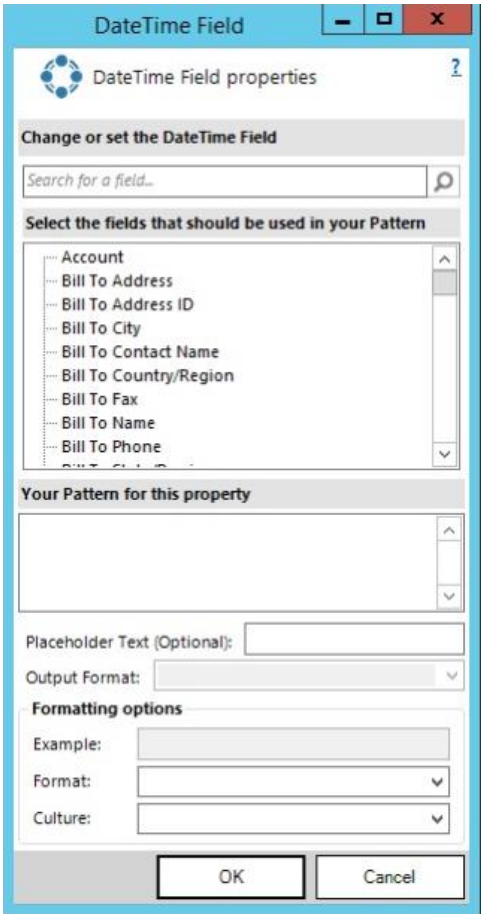


Figure 197: Insert DateTime Dialog

5.26.4 Build your calculation

Add your *DateTime* calculation to the pattern field. The syntax for this field is described here. In our case, we will add 5 days to the due date of a quote.

The layout of the dialog will change dependent on your used syntax.

You have the option to insert any field even if it is not a *DateTime* field. Please do this at your own risk.

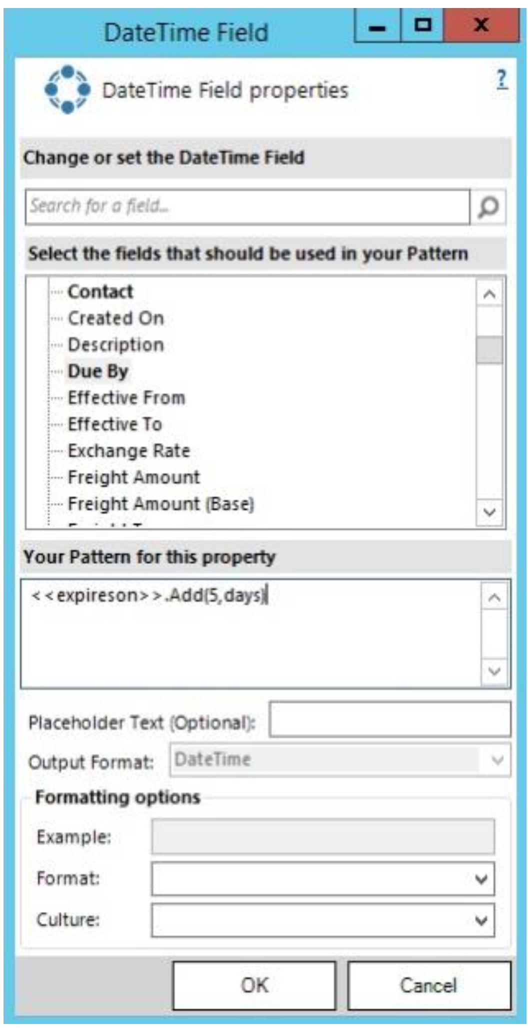


Figure 198: DateTime Field Syntax

5.26.5 Add a placeholder text (optional)

Setup a placeholder text:

1 You can set a placeholder name for your field, so you find it easier in case you have to modify your template in the future.

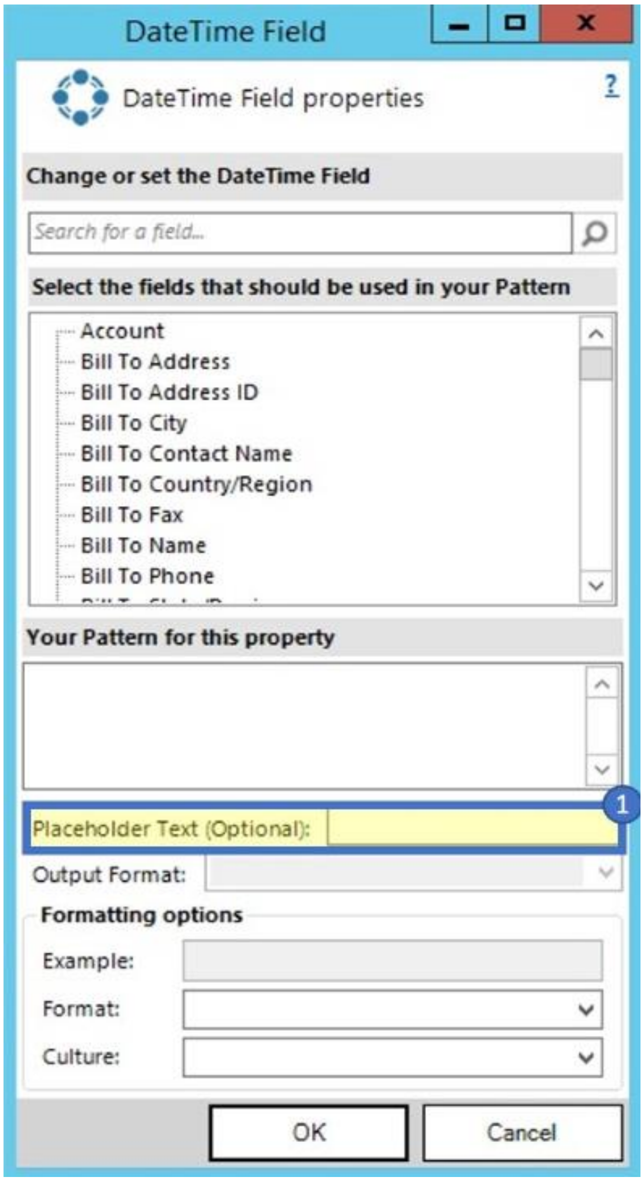


Figure 199: Placeholder

5.26.6 Add formatting options

Since we have our Syntax configured, we would like to define a format. This could be done by selecting one of the given options in the **Unit Type** or the **Format** and **Culture** dropdown.

This dialog provides us with different options for 1 "DateTime" and 2 "Difference" (subtraction of 2 dates) results.

Based on this type we will have one of the two following dialogs.

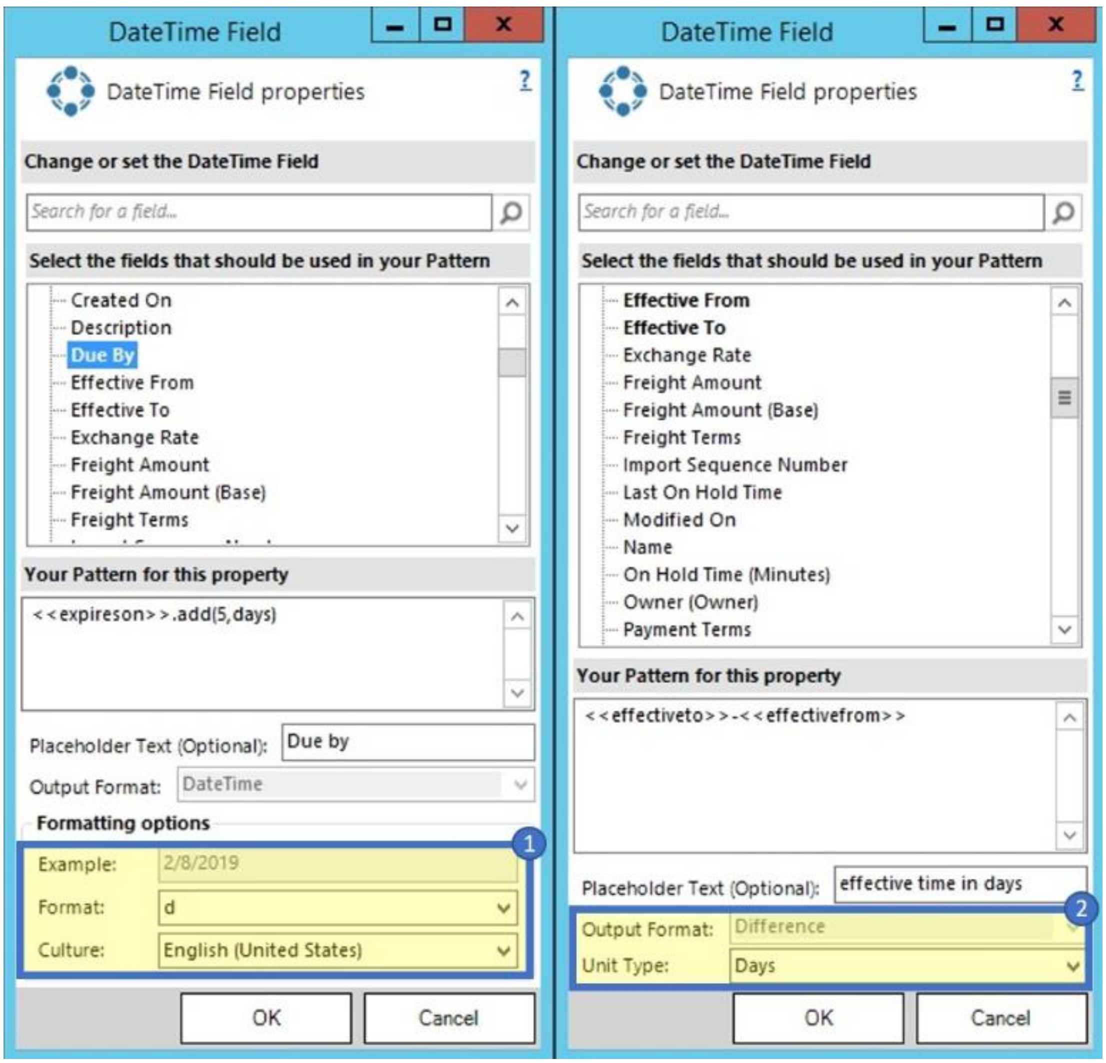


Figure 200: Different options based on the selected syntax

5.26.7 Insert field

Now we have successfully defined our *DateTime*-field and by clicking **[ok]** it will be inserted into the Document.

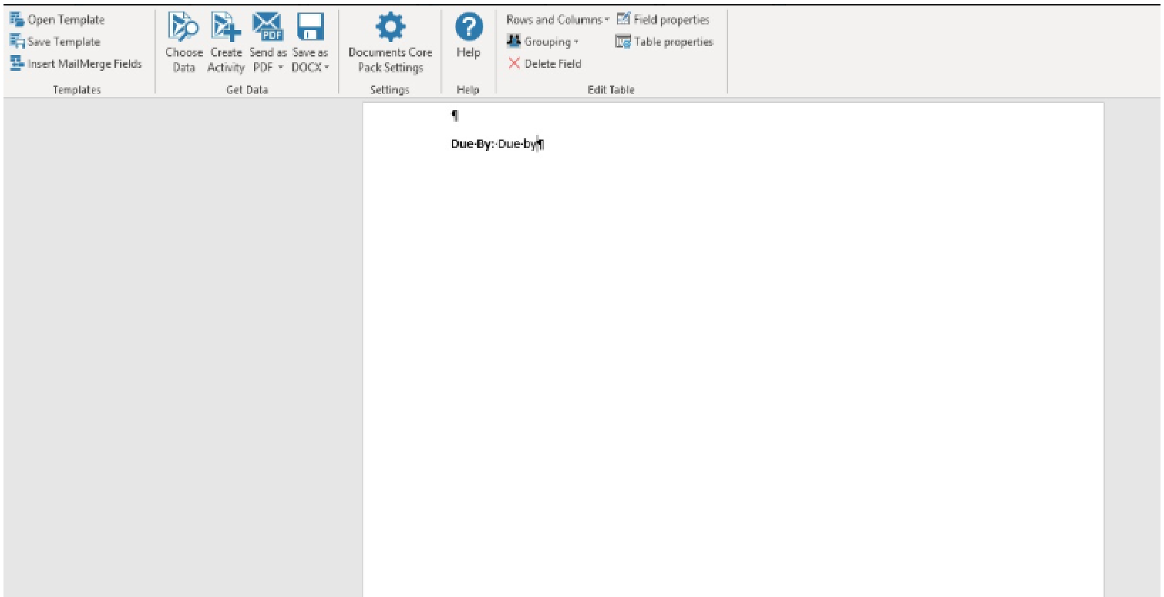


Figure 201: Result Template with DateTime Field

5.26.8 Save the template

The last and final step is to save your template. Before you can use or test your template you have to save it. Either you save your template locally with the standard Save or Save as functionality of Word or you use the Save template-option of the DocumentsCorePack client in order to publish the template to Dynamics 365.

5.26.9 Test the template (optional)

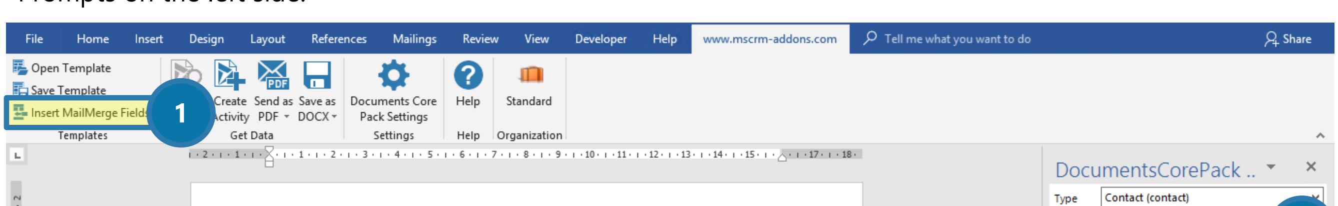
To test the changes to the template here is a step by step description.

5.27 How to insert Prompt Field

Prompts enable the user to add or modify document elements without opening the document.

5.27.1 Create a Prompt

A prompt is defined in a template within the advanced template settings. To access the prompts settings, navigate to ❶ *Insert MailMerge Fields* to open the DocumentsCorePack Taskpane. Go to the Template Designer on the right side and select the ❷ ***[Advanced Template Settings]***-button. Then select ❸ Prompts on the left side.



The Prompts-Editor allows you to 1 create, edit and delete prompts. Also, the 2 sort order of how the prompts should appear can be modified as well.

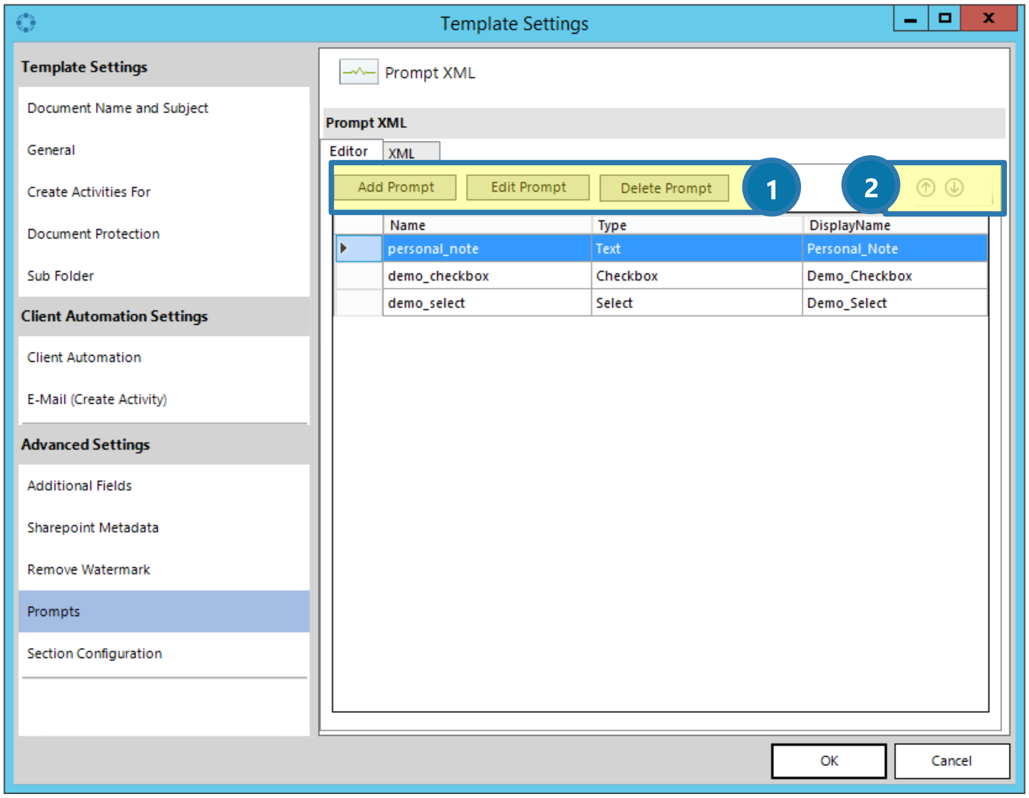


Figure 203: Prompt Editor

5.27.1 Add a Prompt

You can add a prompt by using the ***[Add Prompt]***-button.

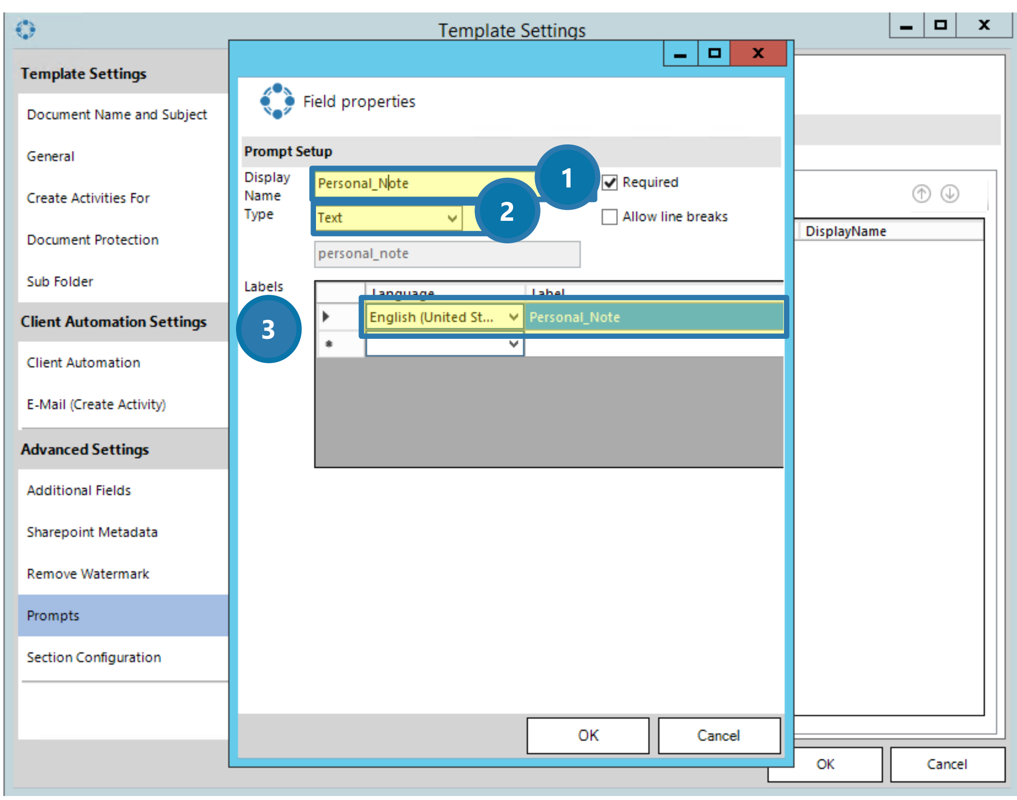


Figure 204: Prompt Setup

❶ Display Name

Each prompt requires a name. Please notice, that special certain chars are not allowed.

❷ Type

There are three different types of prompts that you can create:

- **Text (as single or multiline)**
  A text allows the user to enter additional text in the DCP dialog that will be added to the generated document. A text prompt can be a simple single line of text or also a text box by using the allow line breaks option. By setting the required checkbox you can define if a user has to enter data.

- **Checkbox**
  A checkbox prompt enables you to either add or remove optional content in the document. A checkbox is by default mandatory.

- **Select**
  A select prompt enables you to keep only one specific section, out of several setup blocks in the document.

❸ Labels

Each prompt also requires at least one label. A label is a text that is displayed in the DCP dialog in front of the actual control (see figure above). If a label for the current user language in Dynamics 365 is set, this translation will be displayed. If there is no label that matches the current user´s language, the first one in the list will be displayed.

After you set up the prompts in the Advanced Settings, you are able to insert them into your document.

5.27.2 Insert a prompt in your document

Therefore, hit the ***[Insert Field]***-button and select *Insert Computed Item*. You will find an additional selection – *Prompt Field*. Each entry represents a prompt that you have created previously. The example below shows the three different types of prompts.

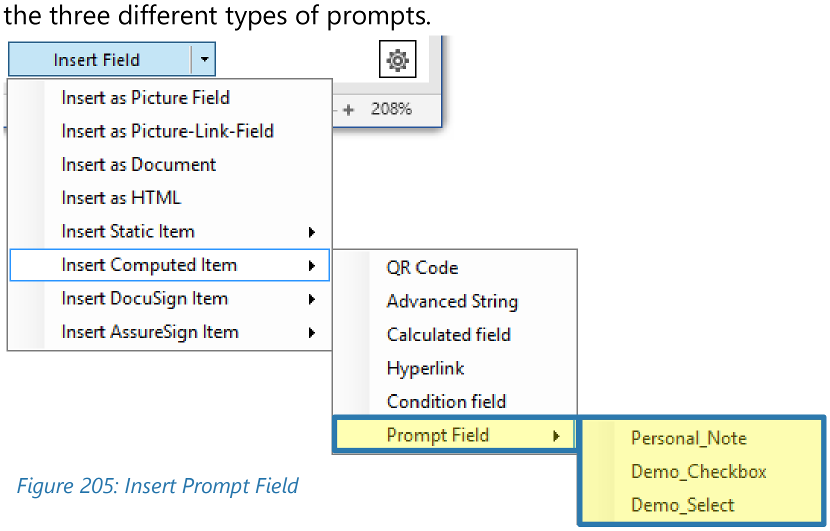


Figure 205: Insert Prompt Field

A 1 text box does not require any further steps as it will be replaced with the text entered by the user. For prompts of the type 2 checkbox and 3 select, you will have to replace the current placeholder text with your desired content.

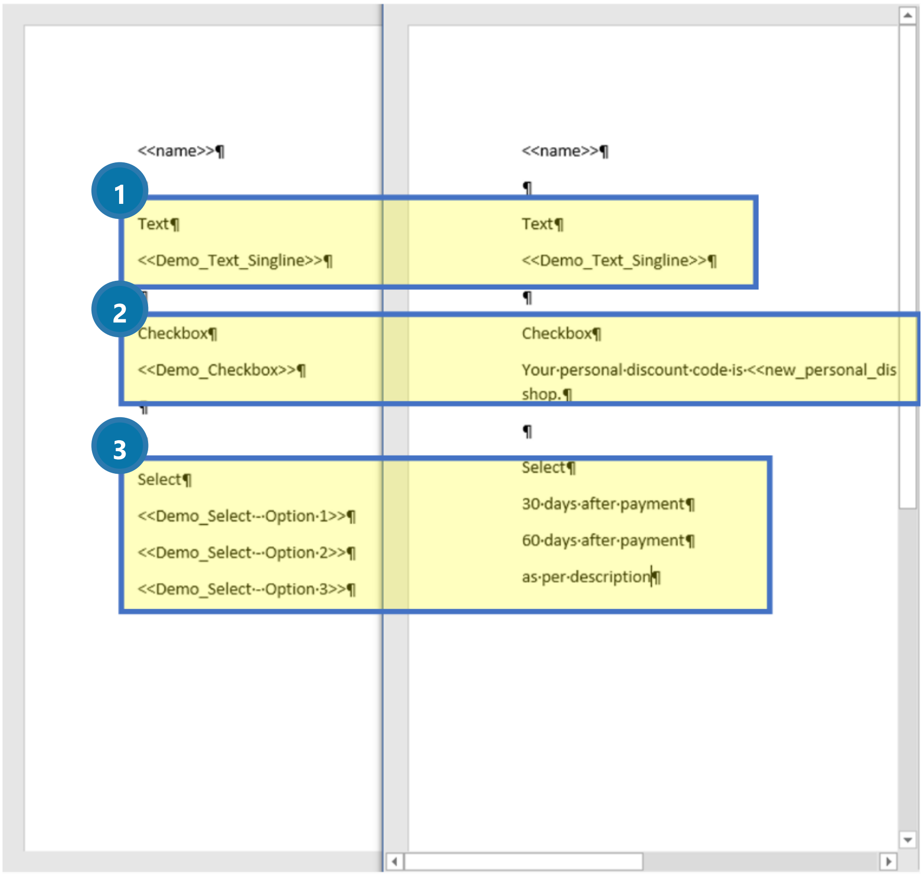


Figure 206: Template before and after replacement of placeholders

5.27.1 Save your template

Before you can use or test your template, you have to save it. Use the Save template-option of DocumentsCorePack client in order to publish the template to Dynamics 365.

5.27.2 Test your template

Go to Dynamics 365, select the record you want to create a document for and click on the ***[Create document]***-button. In the DCP dialog you can now see your newly created prompts (see figure below). As you can see with prompts you can add or modify document elements without opening the document.

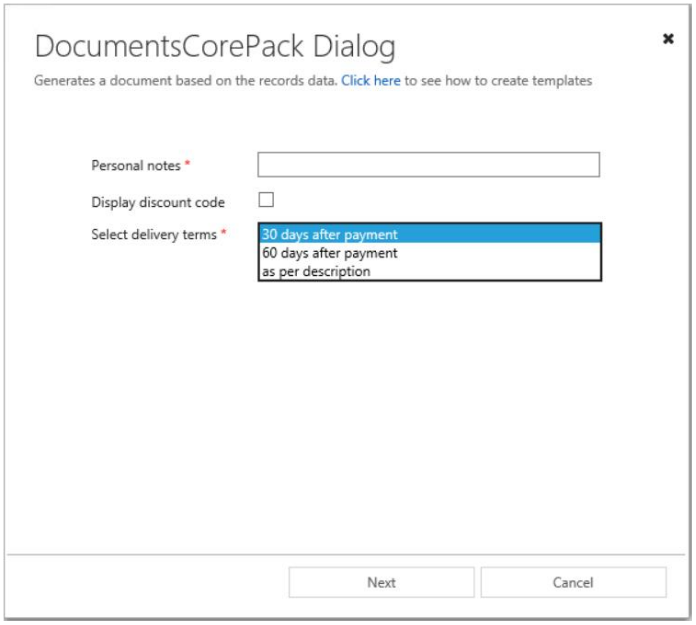


Figure 207: Prompts within the DCP dialog

Prompts do not work with the Template Designer, they work only by using the DocumentsCorePack Server dialog > *Create document*.

5.28 How to modify Field Properties

Fields can be inserted in many different ways. The following two tutorials will show you how to insert a custom date format and a 16-digits number. Please have a look at CHAPTER 1.10 FIELD PROPERTIES ON PAGE 61 for some general information on field properties.

5.28.1 How to define a custom date format

Data fields, like the *Created on* can be displayed in different formats.
In order to configure them, you are able to select a format and a culture in the corresponding drop-down menu. For further information, have a look at CHAPTER 1.10.2 DATE FIELDS ON PAGE 62.

In case none of the predefined formats covers your needs, you can define your own, based on specific formatting rules. To do so, simply type the formatting characters directly into the *Format*-field.

The format is case sensitive.

As soon as you have inserted a custom date, an example will appear in the *Example*-field.

Please find a table with an overview of all possible customizations for data fields in CHAPTER 3.2.1 DATE FIELDS ON PAGE 83. Besides, you may also change the culture. Please find an overview of all possibilities in CHAPTER 3.2.3 CULTURES ON PAGE 87.

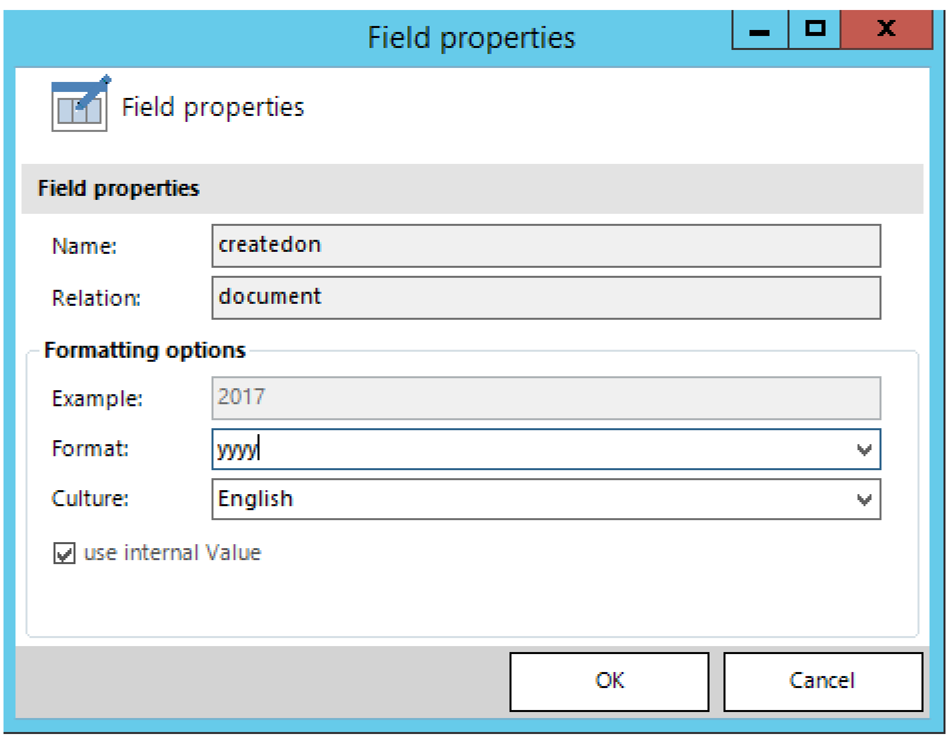


Figure 208: Field properties – Create a custom data field

5.28.2 How to create a custom 16-digits number field

Number fields like *discountamount_base* can as well be displayed in different formats.
In order to configure them, you are able to select a format and a culture in the corresponding drop-down menu. For further information, please have a look at CHAPTER 1.10.3 NUMBER FIELDS ON PAGE 65.

In case none of the predefined formats covers your needs, you can define your own, based on specific formatting rules. To do so, simply type the formatting characters directly into the *Format*-field.

The format is case sensitive.

As soon as you have changed the format, an example will appear in the *Example*-field.

Please find a table with an overview of all possible customizations for number fields in CHAPTER 3.2.2 NUMBER FIELDS ON PAGE 86. Besides, you may also change the culture. Please find an overview of all possibilities in CHAPTER 3.2.3 CULTURES ON PAGE 87.

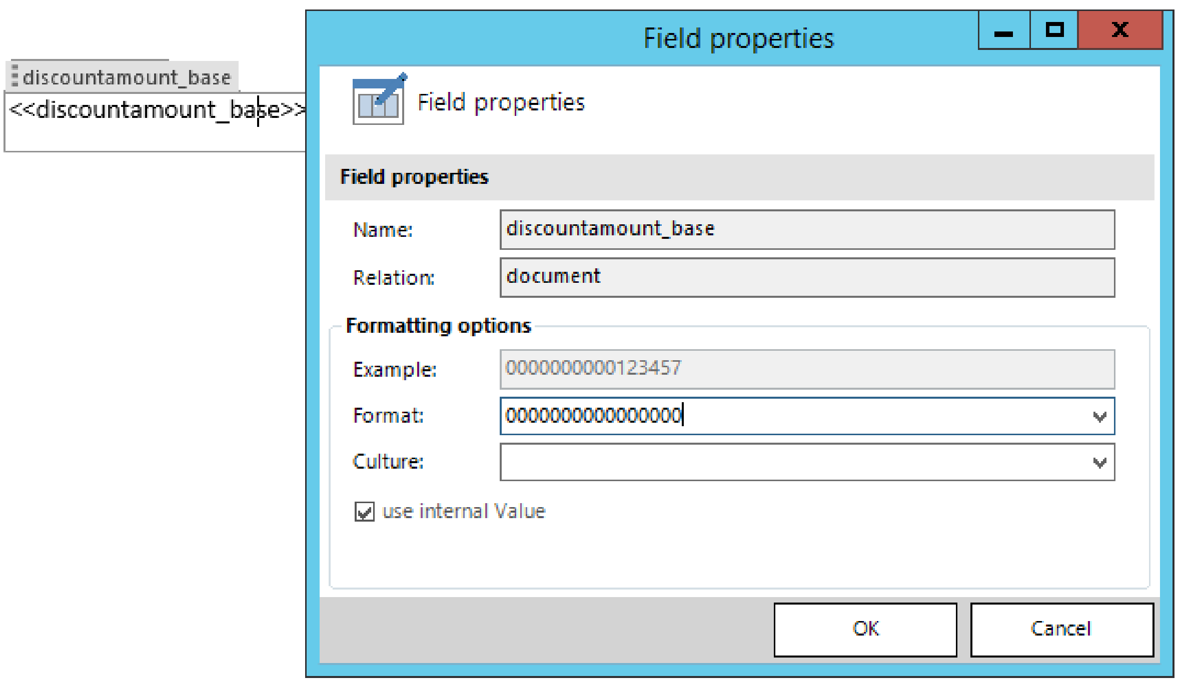


Figure 209: Field properties

5.29 How to add relationships

This functionality enables you to add a relationship to a certain entity in Microsoft Dynamics CRM/Dynamics 365.

5.29.1 Open the Configure fields and data source dialog

The ***[Add Relationship/Entity]***-button also includes buttons that allow its users to add a new relationship or to manage existing relationships and tables. For further information on how to manage tables, please have a look at CHAPTER 2.1 MANAGE TABLES, PAGE 68.

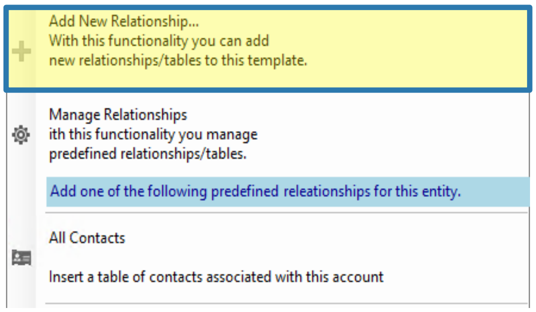


Figure 210: Add New Relationship...

Clicking the ***[Add New Relationship...]***-button opens the dialog shown below. Within it, you can configure fields, tables and relationships that are important for your document.

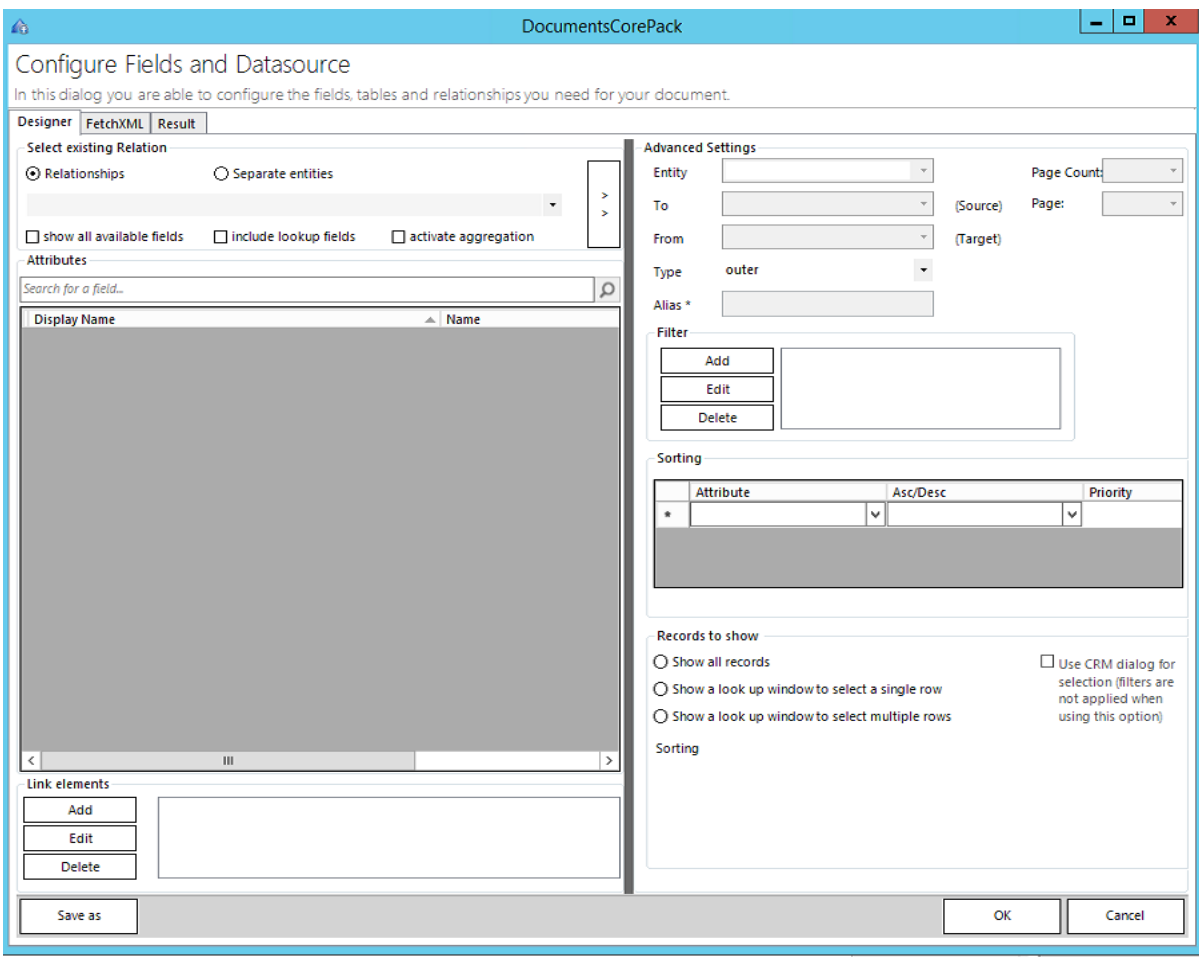


Figure 211: Add New Relationship... - Configure Fields and data source dialog

5.29.2 Add a new relationship

Adding a new relationship mostly requires the left part of the *Configure fields and data source dialog* (except for the ***[OK]***-button that adds the relationship which you find at the right side of the *Configure Fields and data source dialog*.)

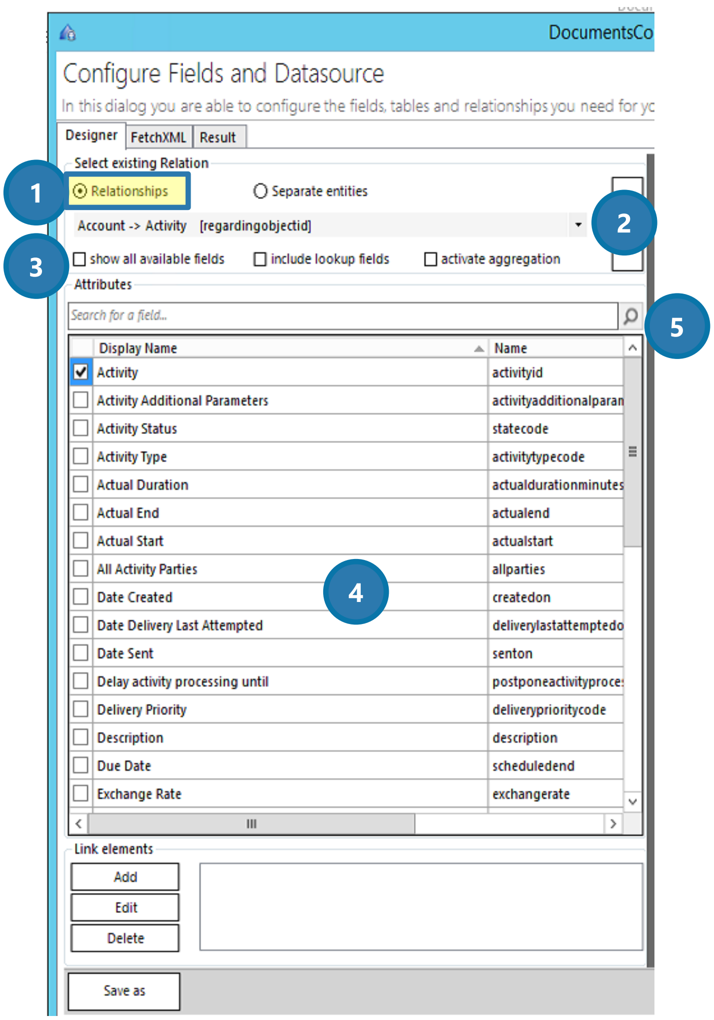


Figure 212: Add New Relationship - Configure Fields and data source dialog section

❶ Make sure that you have selected *Relationships* in order to create a relationship. Marking *Separate Entities* would create entities that have no filter applied. If you want to do so, please have a look at chapter 5.30 HOW TO ADD A SEPARATE ENTITY ON PAGE 195.

❷ Look for the relationship you want to establish in the drop-down menu.

❸ The 3 options allow you to modify the displayed fields.

Check *show all available fields* if you want all available fields to be displayed.

Check *include lookup fields* if you want lookup fields to be added to your results.

Check *activate aggregation* if you want to use the aggregation functionality. For further information on the aggregation functionality, have a look at 1.8.1 AGGREGATION, PAGE 43.

❹ The attributes list view shows all attributes that can be applied to your relationship. Select the ones you would like to add by checking the checkbox in front of the attribute.

❺ The search-functionality allows you to search for attributes.

5.29.3 Get the result

Click on the ***[OK]***-button in the *Configure fields and data source dialog* and you will be provided with the following dialog. Here, you can modify the new table. Please have a look at CHAPTER 5.1.4 STEP 3: INSERT THE TABLE, ON PAGE 102 for details.

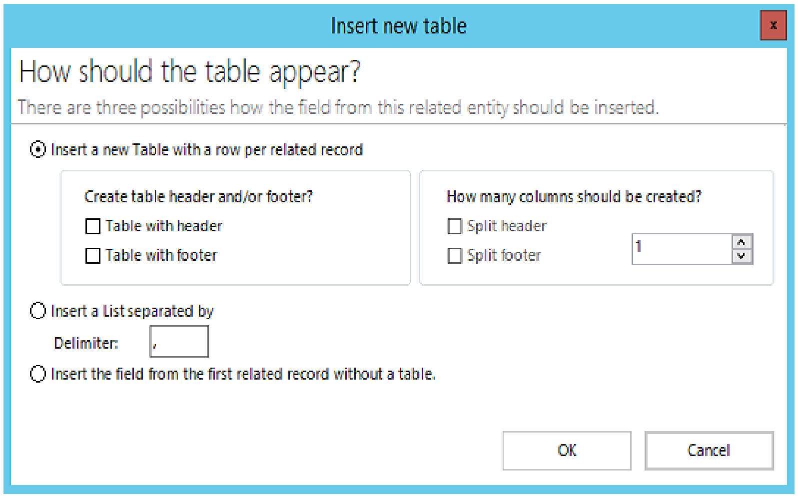


Figure 213: Insert new table

As soon as you have decided how you would like to insert your new table, click on the ***[OK]***-button. We decided to insert the field from the first related record without a table, so you can see that there exists also the possibility to insert the fields without table-function. You are provided with a new table 1. If you move your mouse cursor over *Activity*, a *Boolean field* 2 is displayed. It contains all the information regarding to the relation. A click on the ***[Insert field]***-button inserts the result (a placeholder 3) into your template.

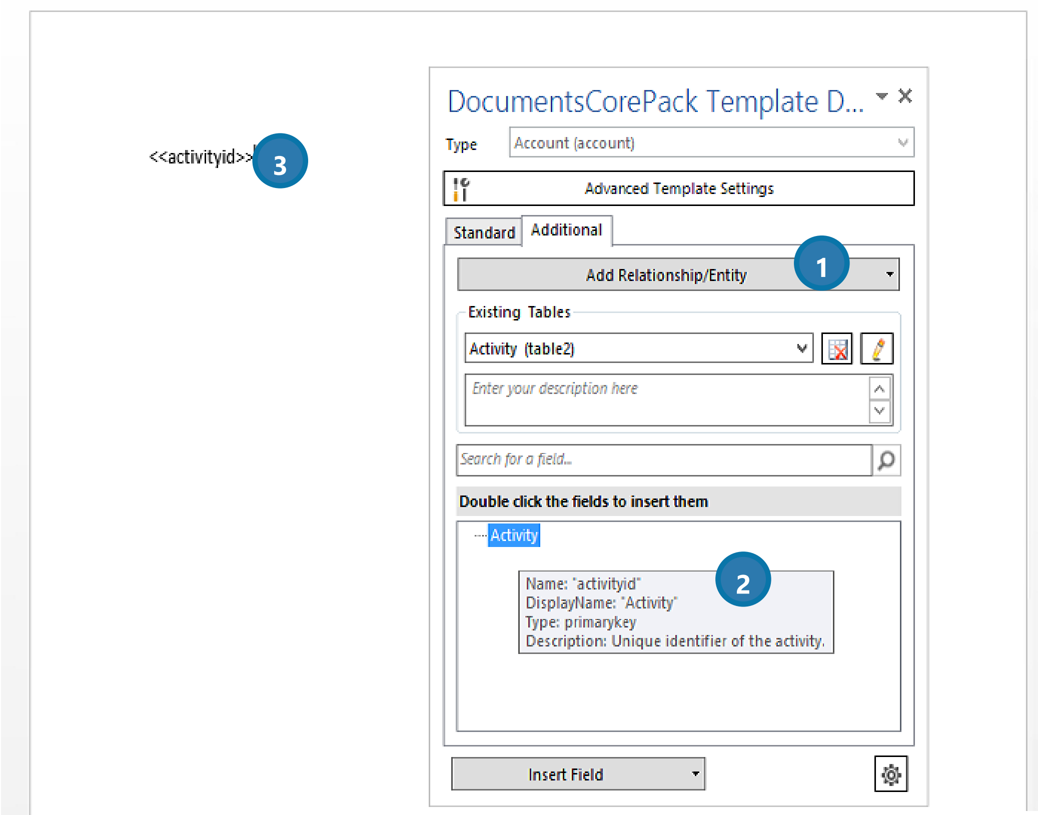


Figure 214: Add new relationship – result

5.30 How to add a separate entity

When you add a separate entity, you must be well aware, that the so added entity does not have any filter applied. If you use this option, you have to add the filter manually.

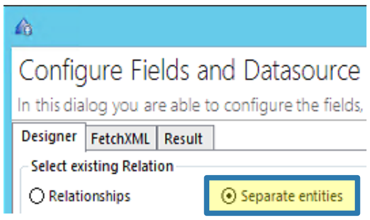


Figure 215: Configure fields – separate

In order to add a separate entity, follow the steps shown in CHAPTER 5.29 HOW TO ADD RELATIONSHIPS, PAGE 192, but take care to check the *Separate entities* option in the *Select existing relation* part of the dialog and to add a filter manually (see next chapter).

5.30.1 How to add the filter manually

To add a filter manually, click on the [Add]-button in the filter section (1). Then select which type of condition you would like to apply (2) and click on the [Add]-button (3) in order to set the conditions attributes and values. Have a look at chapter 3.1 DOCUMENTSCOREPACK CLIENT PROPERTY SYNTAX ON PAGE 72 to learn more about the DocumentsCorePack syntax settings.

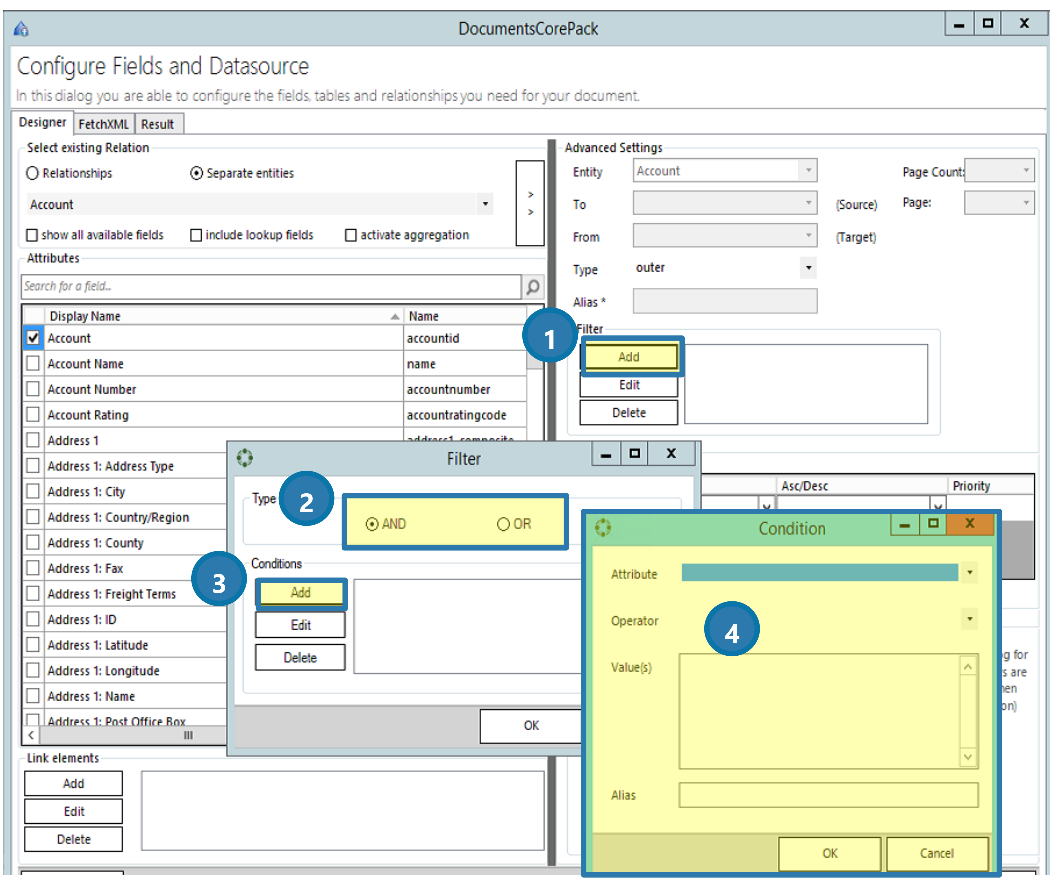


Figure 216 – Configure fields and entities dialog: Add filter manually

6 DocumentsCorePack Template Designer Settings

The DocumentsCorePack Settings summarize application settings for both intended usages of the client. This chapter will only cover the settings that are of interest for the Template Designer functionality.

The DocumentsCorePack Settings can be accessed from within the Word Ribbon.

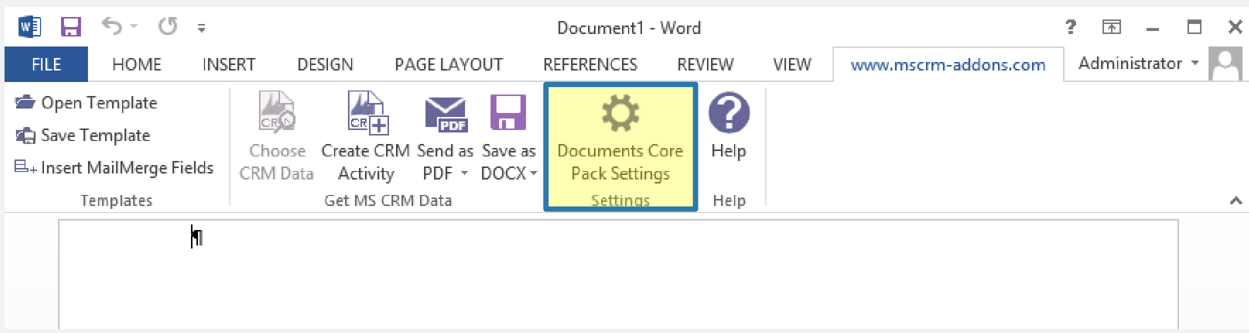


Figure 217: Microsoft Office Word with mscrm-addons.com Ribbon – Documents Core Pack Settings

The settings are grouped in several sections. This guide will only explain some of the options that are available in the general and advanced section.

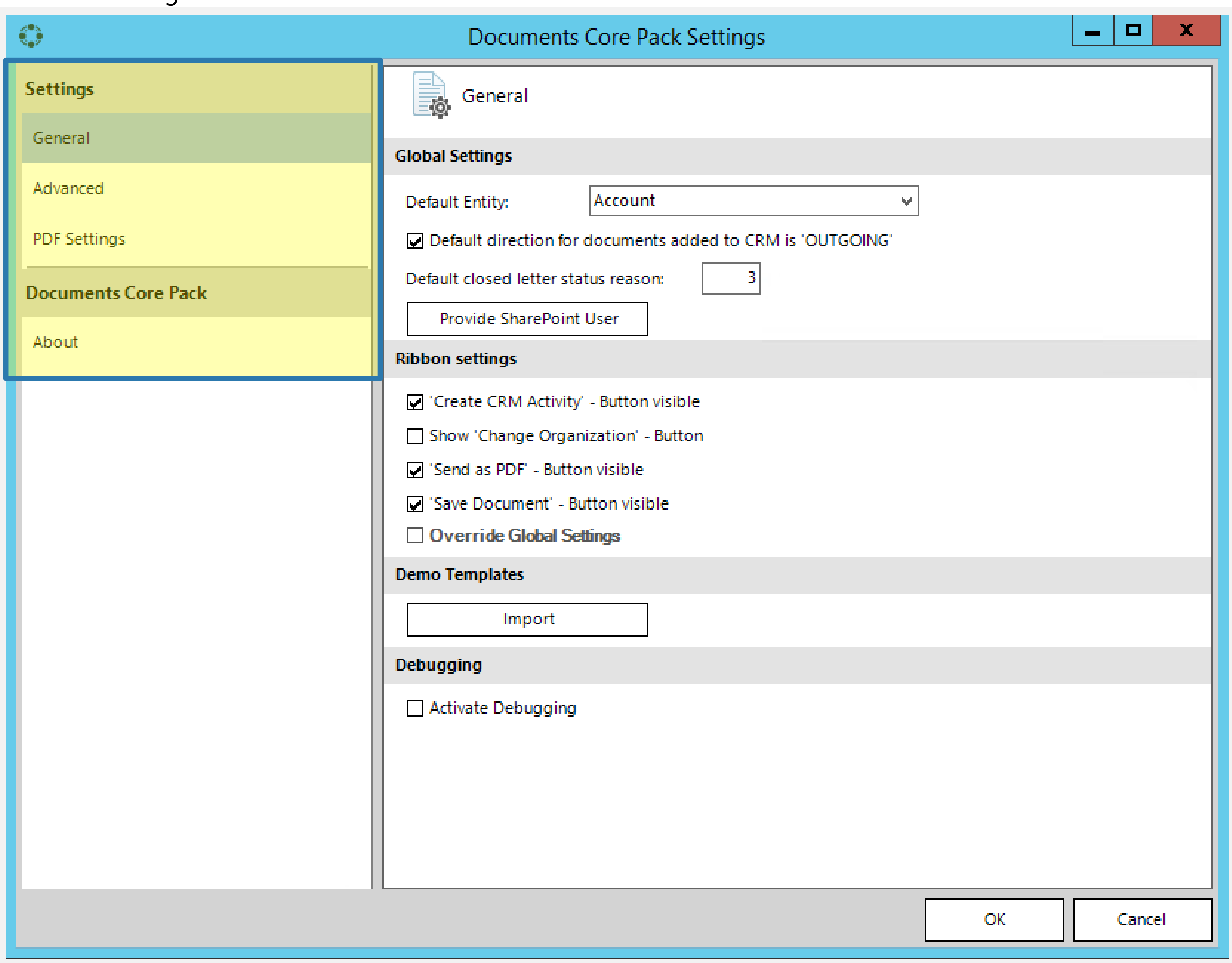


Figure 218: Documents Core Pack Settings

6.1 General

The general section contains several settings for the DocumentsCorePack client.

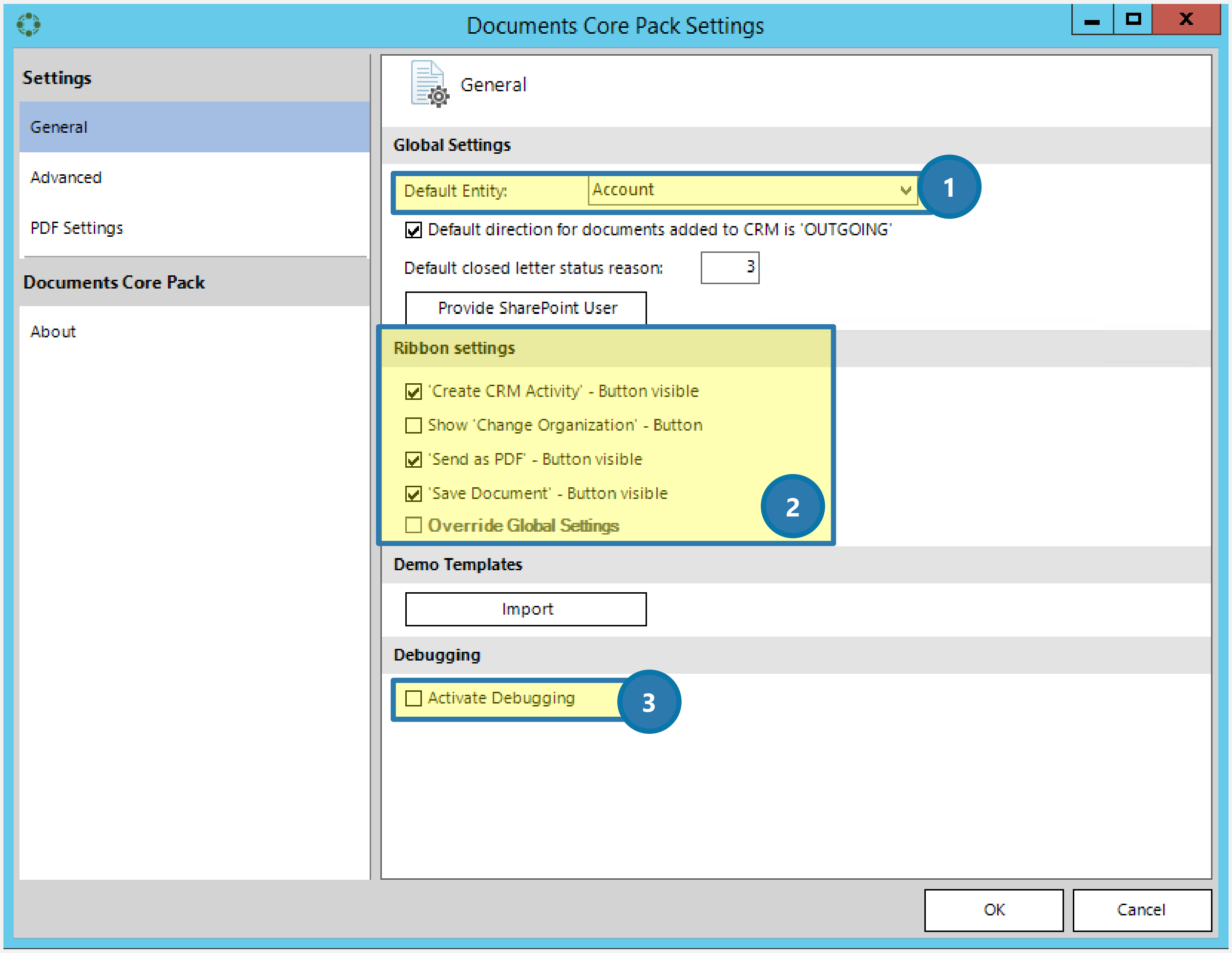


Figure 219: Documents Core Pack Settings - General

❶ Default Entity

The default entity is the entity that is automatically selected in the task pane (Please SEE CHAPTER 1.3 THE DOCUMENTSCOREPACK TEMPLATE DESIGNER USER INTERFACE (STANDARD) ON PAGE 13).

❷ Ribbon Settings

With the Ribbon settings you can change the layout of the www.mscrm-addons.com-ribbon. If you don't want to see the client functionality at all you can disable the “Send as PDF” or “Save Document” options. This can be also set on a global setting for all DCP client users.

❸ Activate Debugging

In case you experience problems with DocumentsCorePack you might be asked to enable debugging for the client. This setting will start tracing and write logging information into the log folder location ("%temp%\DCP\Logs). Additionally, the ribbon will be extended with debugging options. You can open the log folder location form there and also single log files.

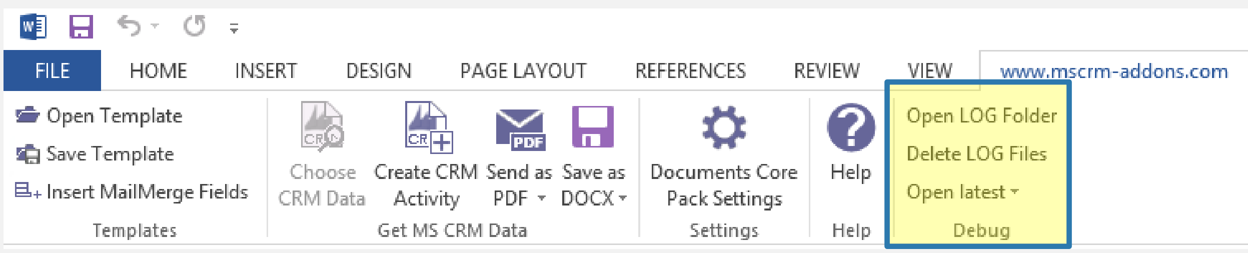


Figure 220: Word Ribbon with Debugging options

6.1.1 Advanced

The advanced options are more specific options

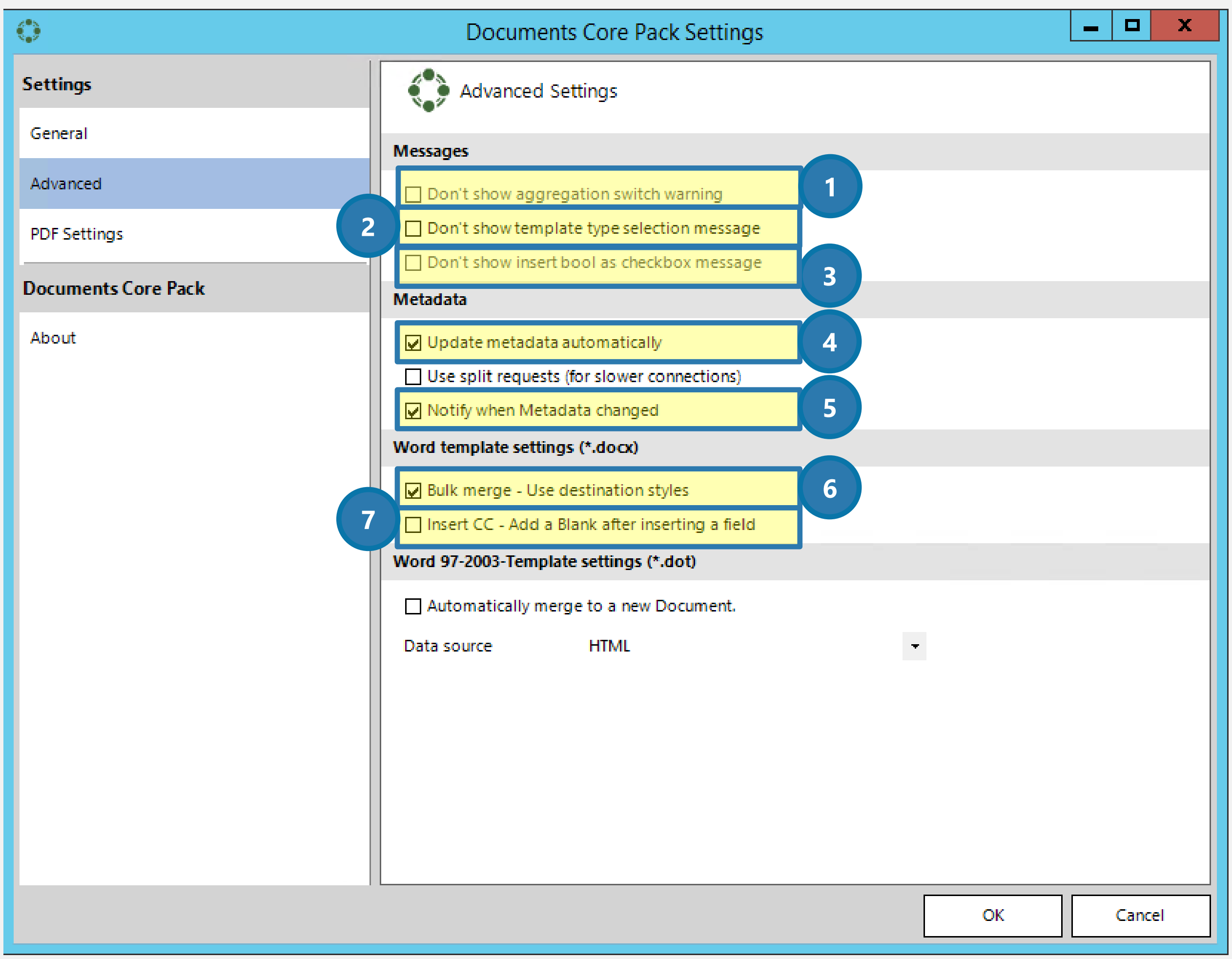


Figure 221: DocumentsCorePack Settings - Advanced

❶ Once checked, the aggregation switch warning is not shown again. For further information on aggregation fetches, please have a look at CHAPTER 5.8 HOW TO CREATE AN AGGREGATION FETCH, PAGE 132.

❷ Once checked, the template type selection message is not displayed again in the beginning. The type selection message enables you to select between .dot and .docx templates. We recommend you to stick with the .docx templates.

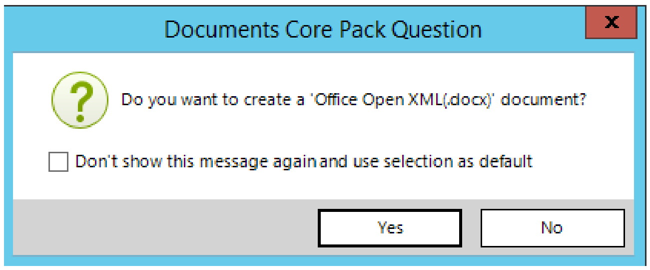


Figure 222: DocumentsCorePack Template Designer type selection message

❸ When checked, insert bool is not displayed as checkbox message.

❹ When checked, metadata from CRM is updated automatically. We recommend this box to be checked because you do not have to update the metadata manually each time it has changed.

❺ Once checked, you are notified if your metadata should have changed.

❻ When checked, destination style is preferred for bulk merge.

❼ When checked, a blank is automatically inserted when a field is inserted, and emails are automatically sent as carbon copy.

Options ❶ to ❸ are only enabled when the “Do not show again” option was set once on for any of these dialogs.

7 General Word functionality that is referenced in this guide

Within this chapter, you find some word short How-To's related to Word functionalities that could be useful in order to work with templates.

7.1 How to insert a Watermark

Watermarks can be viewed only in Print Layout and Full Screen Reading views and on the printed page. You can insert a predesigned watermark from a gallery of watermark text, or you can insert a watermark with custom text.

How to

On the Page Layout tab, in the Page Background group, click Watermark.

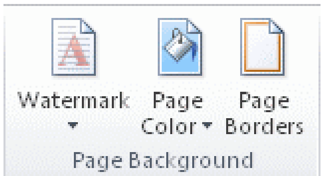


Figure 223: Insert Watermark

Do one of the followings:

Click a predesigned watermark, such as **Confidential** or **Urgent**, in the gallery of watermarks.

Click **Custom Watermark**, click **Text watermark** and then select or type the text that you want. You can also format the text. To view a watermark as it will appear on the printed page, use Print Layout view.

Source:

https://support.office.com/en-us/article/Insert-a-watermark-or-change-a-watermark-f90f26a5-2101-4a75-bbfe-f27ef05002de

For further information on watermarks have a look at:

https://support.office.com/en-us/article/Insert-a-watermark-or-change-a-watermark-f90f26a5-2101-4a75-bbfe-f27ef05002de

7.2 How to work with field functions

Insert a field

1. Click where you want to insert a field.
2. On the Insert tab, in the Text group, click Quick Parts, and then click Field.

Figure 224: Field functions

3. In the Categories list, select a category.
4. In the Field names list, select a field name.
5. Select any properties or options that you want.

- If you want to see the codes for a particular field in the Field dialog box, click Field Codes.
- To nest a field within another field, first insert the outer, or container, field, by using the Field dialog box. In your document, place the insertion point inside the field code where you want to insert the inner field. Then use the Field dialog box to insert the inner field.

If you know the field code for the field that you want to insert, you can also type it directly in your document. First press CTRL+F9, and then type the code within the brackets.

Source:

https://support.office.com/en-US/article/Insert-and-format-field-codes-in-Word-2010-7E9EA3B4-83EC-4203-9E66-4EFC027F2CF3#bm1

For further information on fields, please have a look at:

https://support.office.com/en-US/article/Insert-and-format-field-codes-in-Word-2010-7E9EA3B4-83EC-4203-9E66-4EFC027F2CF3#bm1

7.3 CRM SharePoint Integration

Microsoft SharePoint Server is a collaboration and content management application that simplifies how people store, find, and share information. It helps people to collaborate effectively by having secure access to documents and information that they require to make business decisions.

The SharePoint integration feature enables you to store and manage documents on SharePoint in the context of a Microsoft Dynamics CRM/Dynamics 365 record, and use the SharePoint document management abilities in Microsoft Dynamics CRM/Dynamics 365, such as checking the document in and out, viewing version history, and changing document properties.

Source:
https://msdn.microsoft.com/en-us/library/gg334768.aspx

For more information on CRM SharePoint Integration please have a look at:
https://msdn.microsoft.com/en-us/library/gg334768.aspx

7.4 What is CRM Metadata

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

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

For more information on CRM Metadata, please have a look at:
https://msdn.microsoft.com/en-us/library/gg309434.aspx

7.5 Location of files

There are three major save locations for files that are used by the DocumentsCorePack Client.

The CRM numbers in the below paths are displayed as “20XX”, because the path depends on the CRM version you are currently using. Please insert your version number instead of the “XX”. (For example: For CRM 2015, insert 15 instead of XX).
If you upgrade from an older version, the DCP version number can change too.

7.5.1 The installation directory

The installation files of DocumentsCorePack can be found here:
C:\Program Files\PTM EDV-Systeme GmbH\Documents Core Pack Client for MS CRM 20XX.

Alternatively:
C:\Program Files(x86)\PTM EDV-Systeme GmbH\Documents Core Pack Client for MS CRM 20XX
(depending on your Windows and Office version)

If you have changed the installation path during the installation process you will find the files there.
This directory contains the needed assemblies and resources.

Do NOT ever delete, change or modify any files in this location.

7.5.2 The application directory

The application data location can be found here: *%APPDATA%\DCP*
The above location is equal to *C:\Users\[YourUsername]\AppData\Roaming\DCP*.

This location may contain volatile subfolders and documents. The most important subfolder here is called *metadata*. This folder contains the metadata information of your CRM organization(s).

7.5.3 The temporary directory

The application data location can be found here: *%TEMP%\DCP*
The above location is equal to *C:\Users\[YourUsername]\AppData\Local\Temp\DCP*

This location contains temporary files, like for example downloaded templates. The most important subfolder in this location is the subfolder *log,* which contains debug files if debugging is enabled.

8 DCP Diagnostics

The DCP Diagnostics is an extended application that troubleshoots issues with the DocumentsCorePack Client. It can be found in the installation folder of DocumentsCorePack (for further information, please have a look at CHAPTER 7.5.1 THE INSTALLATION DIRECTORY ON PAGE 205).

The name of the application in this folder is *DCPDiagnostics.exe*.

If you are no local administrator, some functionalities of the tool may not work properly. Executing the program as administrator avoids any issues.

If you are no administrator, you will get the below error message when you click on *DCPDiagnostics.exe*. Simply click on the ***[Yes]***-button in order to proceed.

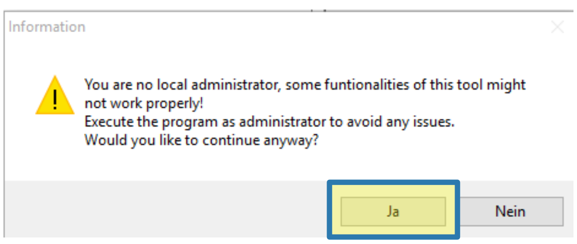


Figure 225: Warning message

You will be then forwarded to the DCP Diagnostics surface.

8.1 The DCP Diagnostics surface

The DCP Diagnostics surface consists of 3 tabs: Diagnostics, System Information and Tools. The functionality of the different tabs is displayed in the next chapters.

8.1.1 The Diagnostics – tab

The tab provides you with a general overview.

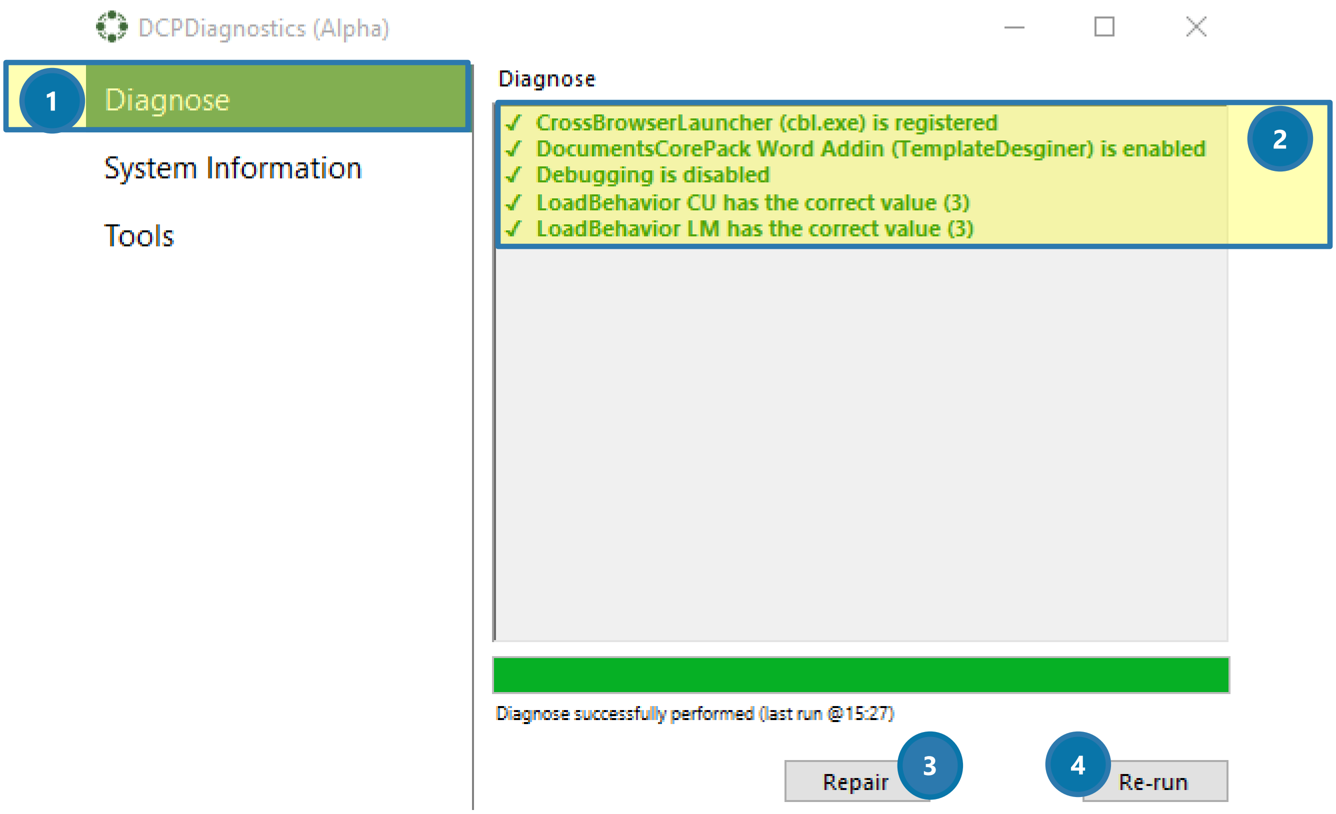


Figure 226: The DCP Diagnostics-tab

1 Diagnostics

The tab offers a short overview of the most important system settings required by DCP.

The information regarding the system 2 is displayed in different colors:

Green = OK

Orange = still quite OK, but not in a green way and not as bad as a red alert

Red = Action might be needed (there might be some trouble, but it's not clear yet)

3 The *[Repair]*-button

Serves as a kind of *fast repair*, if a red/orange alert occurs.

4 The *[Re-run]*-button

Starts the repair process once again

8.1.2 The System Information-tab

The tab provides you with a quick overview of the operating system version, the Browser version, the Net framework version, the Office version, the DCP version etc. …

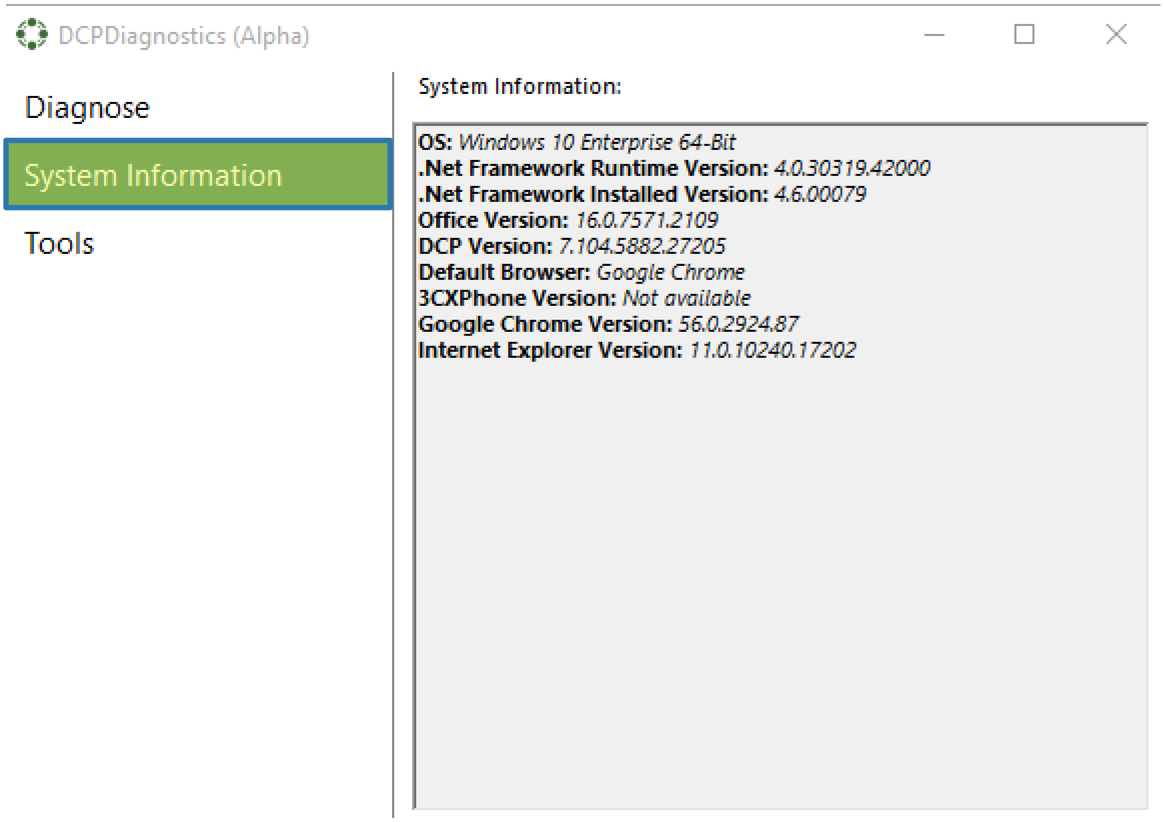


Figure 227: The System Information-tab

8.1.3 The Tools-tab

Provides you with a little collection of tools that support you when you need some troubleshooting.

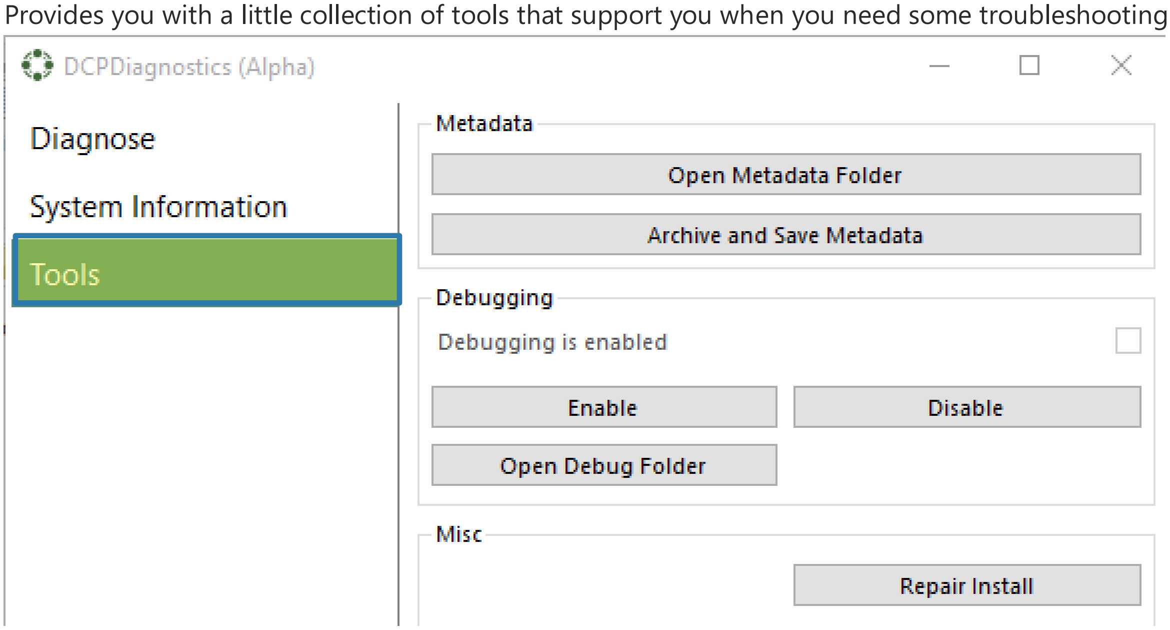


Figure 228: The Tools-tab

9 References

MSDN. (n.d.). Retrieved from https://msdn.microsoft.com: https://msdn.microsoft.com/en-us/library/gg328332.aspx

10 Glossary

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

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

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

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

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

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

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

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

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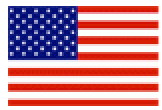

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