



Printing with DocumentsCorePack

August 2021

(How to install and configure DocumentsCorePack Print Application for Microsoft Dynamics 365)

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CONTENT

1 Printing with DocumentsCorePack	4
2 DocumentsCorePack Print Service	5
2.1 DocumentsCorePack Print Service installation	5
2.2 DocumentsCorePack Print Service configuration	6
2.2.1 Start the service configuration	6
2.2.2 Create a new service or select an existing one	6
2.2.3 Select the print jobs	7
2.2.4 Select the CRM type	8
2.2.5 Open the CRM Connection Advanced Options	9
2.2.6 Start the service	11
2.3 How to create a Printer Configuration	12
3 DocumentsCorePack PrintApplication	13
3.1 DCPPrintApplication Installation	13
3.1.1 End User License Agreement (EULA)	14
3.1.2 Change the installation folder	14
3.1.3 Confirm the installation	15
3.1.4 Connect to Dynamics 365	16
3.1.5 Finish the installation	17
3.2 DCPPrintApplication Configuration	18
3.2.1 The General-tab	19
3.2.2 The Printer-tab	19
3.2.3 The License-tab	22
3.2.4 The Log-tab	22
4 Cloud Print and Integration	24
4.1 Microsoft Universal Print – Printer Configuration for DocumentsCorePack	24
4.1.1 Prerequisites	24
4.1.2 Configure a new Microsoft Universal Print – printer for DocumentsCorePack	25
4.2 Printix – Printer Configuration for DocumentsCorePack	29
4.2.1 Prerequisites	29
4.2.2 Configure a new “Printix” Printer for DocumentsCorePack	32
4.3 PrintNode – Printer Configuration for DocumentsCorePack	37
4.3.1 Prerequisites	37
4.3.2 Configure a new “PrintNode” Printer for DocumentsCorePack	38
List of figures	43

Preamble

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

With DocumentsCorePack Print Application you have the possibility to set up one or more local printers, which can be used in Dynamics 365 via the DocumentsCorePack Dialog.

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

Target Audience

This guide is intended for users who would like to benefit from DocumentsCorePack Print Application and have the following minimum skills:

- Basic Microsoft Dynamics 365 Knowledge
- Maintaining and configuring a Microsoft CRM Organization

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

- Installing DocumentsCorePack Print Application for Microsoft Dynamics 365
- Configuring DocumentsCorePack Print Application for Microsoft Dynamics 365

Prerequisites

Microsoft .NET Framework 4.6.2 is required

One of the following versions of Microsoft Dynamics CRM must be available:

- Microsoft Dynamics 365
- Microsoft Dynamics CRM Online

1 Printing with DocumentsCorePack

This article outlines the extensive printing capabilities that DocumentsCorePack provides for the Power Platform and Dynamics 365. Once your local system is set up, you can access printers from any Microsoft Business Application via Power Automate or directly from Dynamics 365 or your PowerApp.

DocumentsCorePack comes with several options to configure printers.

1. **Print Service:** The service allows us to expose network printers to be available for printing via DocumentsCorePack. It comes with proper print service management and logging capabilities to handle multiple printers and high print volumes. The service should be deployed on dedicated print servers to ensure access- and availability.
 - Details: [Service-based printing in DocumentsCorePack](#)
2. **Print Application:** This application allows you to define and enable printing on "personal" printers (e.g. attached to your computer or laptop only) and is intended for small local printer installations.

It does not work on servers with multiple printers.

 - Details: [Print Application \(Configuration and Utilization\)](#)
3. **Cloud Print:** Cloud print infrastructure moves print infrastructure to a cloud. This offers advantages in that you save time and money on print installation and server installation, reduce maintenance and local updates, and add a great deal in terms of scalability, functionality, and accessibility. Therefore, they can be used from any web app regardless of whether these printers are installed on the device you are using and regardless if you have permission to install a printer on the device.
 - Details: The major cloud print providers are [Microsoft Print](#), [Printix](#) and [PrintNode](#)

2 DocumentsCorePack Print Service

DocumentsCorePack offers a service-based printing option which is additionally available to the already known plugin-based printing option. This additional option is based on a service which is running in the background

2.1 DocumentsCorePack Print Service installation

First of all, you have to install [DocumentsCorePack for Microsoft Dynamics 365](#). For further information have a look [here](#).

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

2.2 DocumentsCorePack Print Service configuration

2.2.1 Start the service configuration

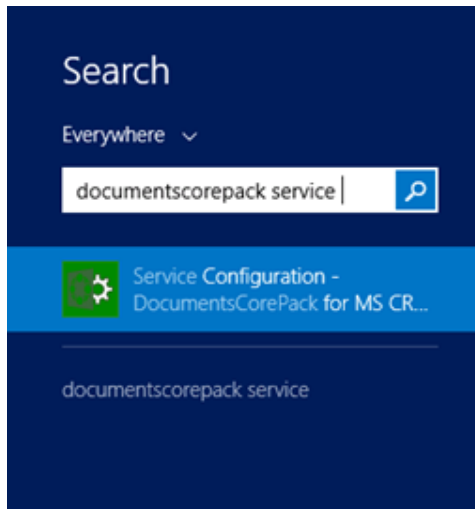


Figure 1: Start service configuration

Start the *Service Configuration DocumentsCorePack for Dynamics 365* from within the Windows start menu:

2.2.2 Create a new service or select an existing one

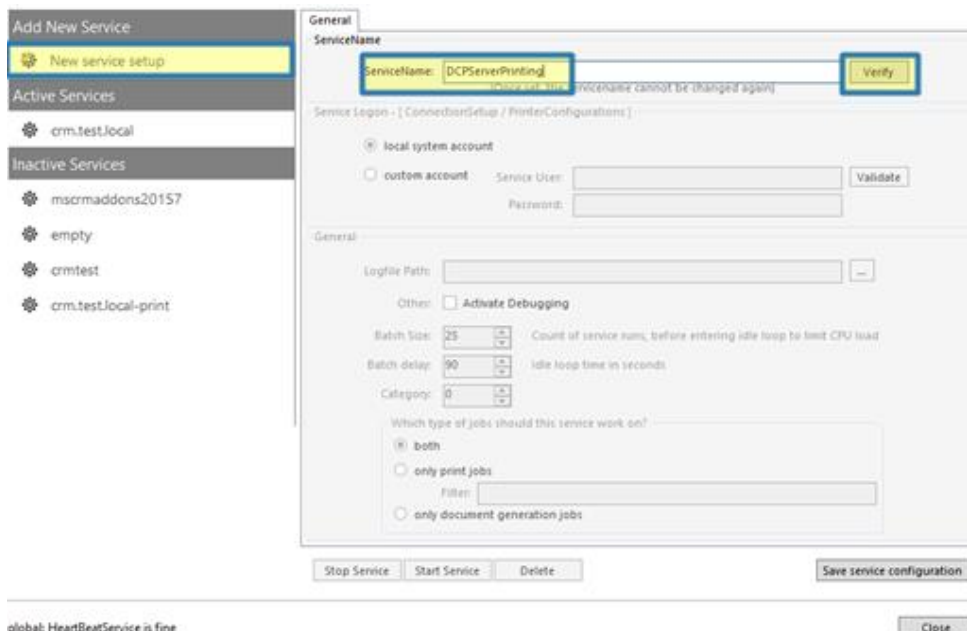


Figure 2: Create a new service or select an existing one

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

2.2.3 Select the print jobs

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

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

The screenshot displays a configuration window with the following elements:

- Logfile Path:** A text input field followed by a browse button (three dots).
- Other:** A checkbox labeled "Activate Debugging".
- Batch Size:** A spinner box set to 25, with a description "Count of service runs, before entering idle loop to limit CPU load".
- Batch delay:** A spinner box set to 90, with a description "Idle loop time in seconds".
- Category:** A spinner box set to 0.
- Which type of jobs should this service work on?:** A section containing three radio buttons: "both", "only print jobs" (which is selected and highlighted in yellow), and "only document generation jobs". Below the "only print jobs" option is a "Filter:" label followed by a text input field containing "HP178c56".

Figure 3: Create a new service or select an existing one

2.2.4 Select the CRM type

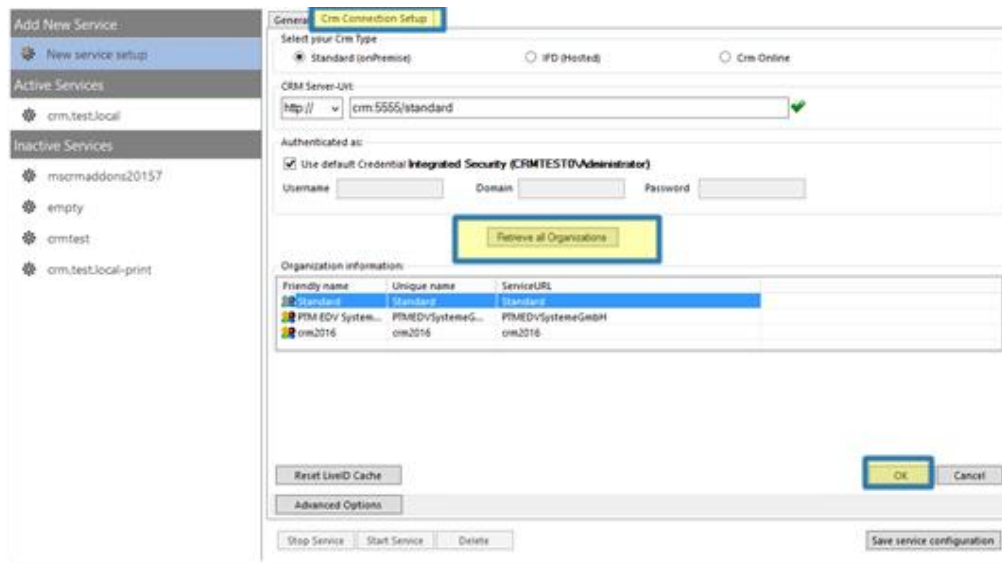


Figure 4: Select the CRM type

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

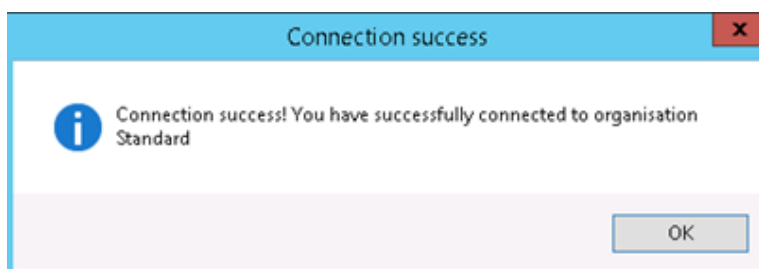


Figure 5: Connection success

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

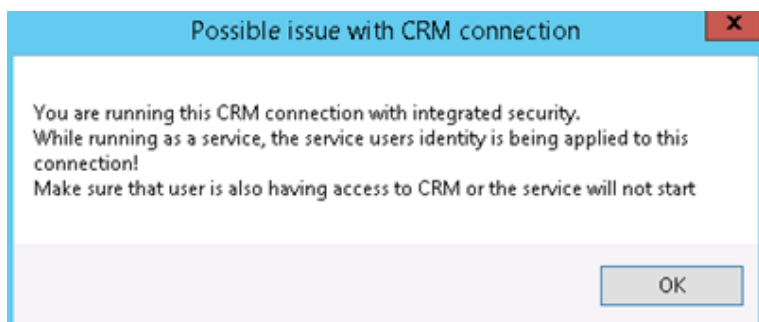


Figure 6: Possible issue with CRM connection dialog

2.2.5 Open the CRM Connection Advanced Options

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

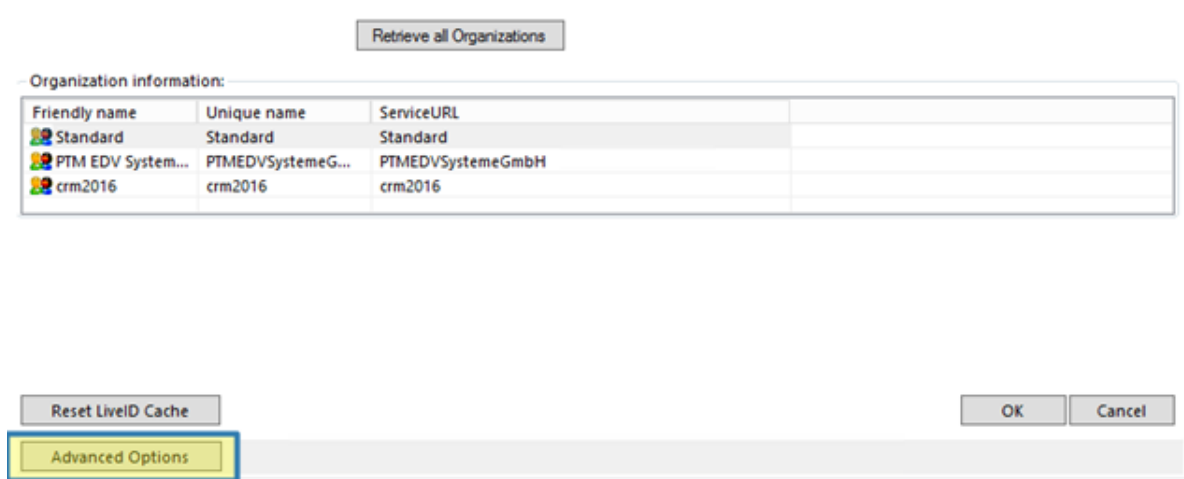


Figure 7: Possible issue with CRM connection dialog

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

Login information

Welcome to your Dynamics 365 Connection setup.

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

Dynamics 365 Connection

Advanced Settings

Log

Existing Profiles

[HKLM] https://crm306852.crm4.dynamics.com

Manage

Select your Dynamics 365 Type

☐ OnPremise

☐ IFD/Hosted

☒ Online

☐ AppAccess

Dynamics 365 Server-Url:

https://crm306852.crm4.dynamics.com

Authenticated as:

☐ Use default Credentials

admin@CRM306852.onmicrosoft.com

☐ Prefer Server2Server authentication

Username

admin@CRM306852.c


Domain

Password

••••••••

Retrieve all

Organization information:

Friendly name	Unique name	ServiceURL
 Contoso	org858e3467	https://crm306852.crm4.dynamics.com/XRMServices/...

OK

Cancel

Figure 8: CRM connection setup

2.2.6 Start the service

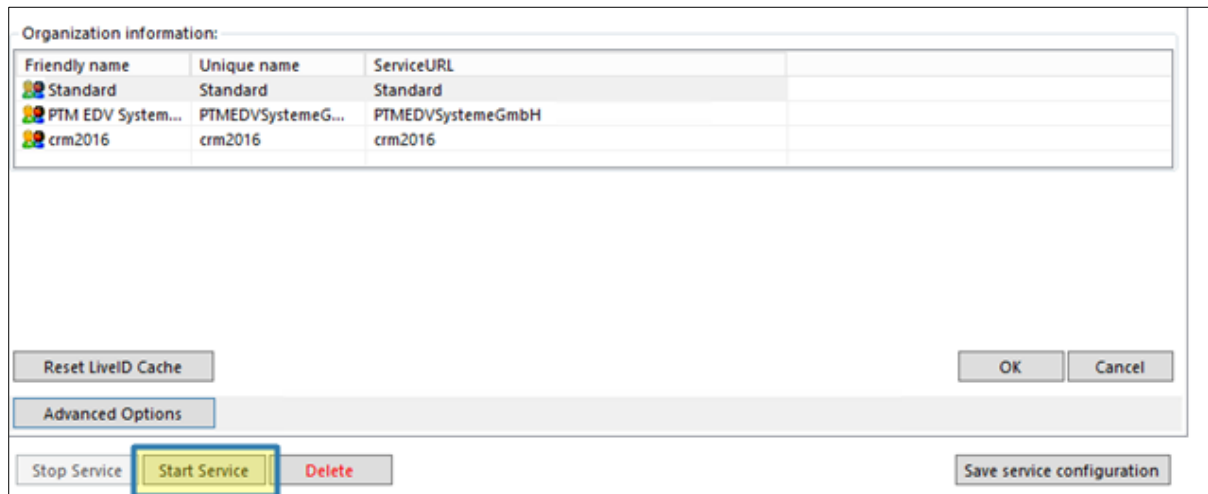


Figure 9: Click on the start service button

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

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

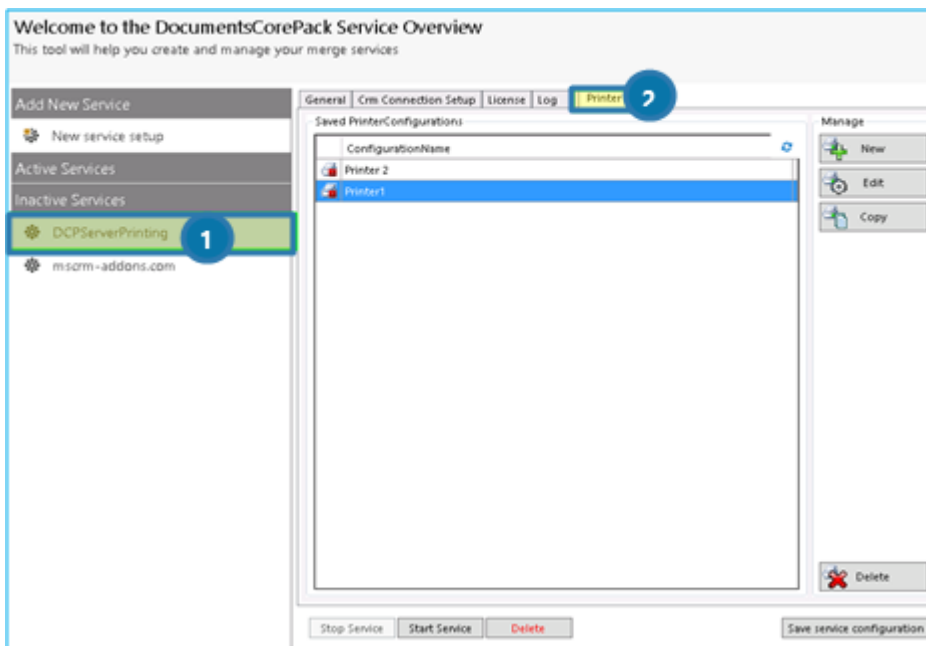


Figure 10: Select a printer

2.3 How to create a Printer Configuration

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

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

Figure 11: Configure a printer

- 1 You must specify a configuration name to be able to create a printer configuration.
- 2 Google CloudPrint Mode is enabled per default.



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

- 3 Supply your Google account credentials to retrieve the list of available printers for that account.
- 4 Click on the drop-down button or open a saved document to print a TestPage



Figure 12: Local printer test pages

After having configured and started the service for printing, you can start to configure a workflow including the service-based printing option.

3 DocumentsCorePack PrintApplication

This chapter explains how to install the DCP Print Application. Before you start the installation, you have to download the DocumentsCorePack Print Application. You can download files [here](#).

3.1 DCPPrintApplication Installation

Run the "DCPPrintApplication for Dynamics 365.exe" setup file. You will see the following window: Hit the **[Next >]**-button to continue with the license agreement.

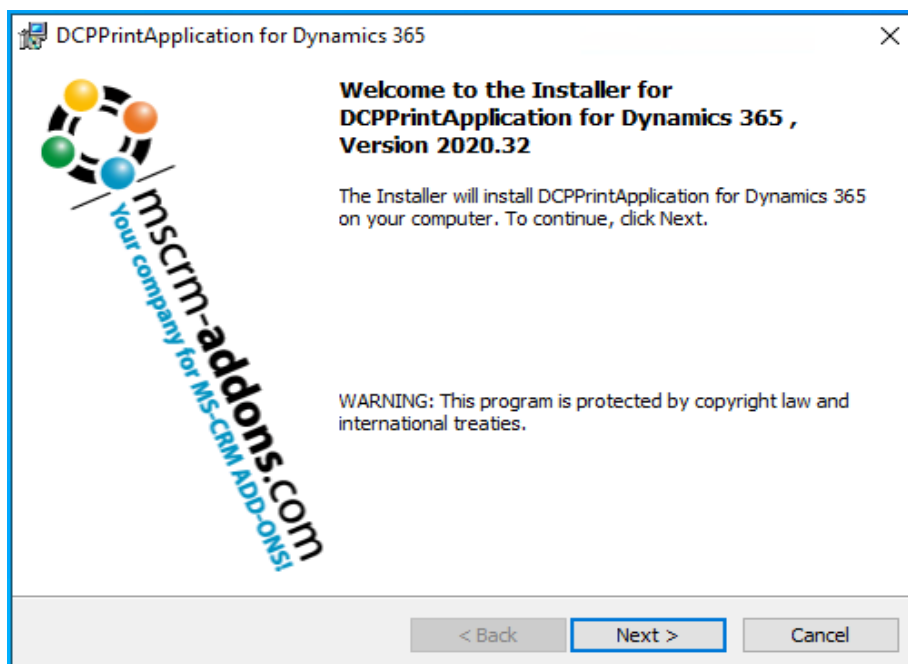


Figure 13: Installer DCPPrintApplication for Dynamics 365

3.1.1 End User License Agreement (EULA)

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

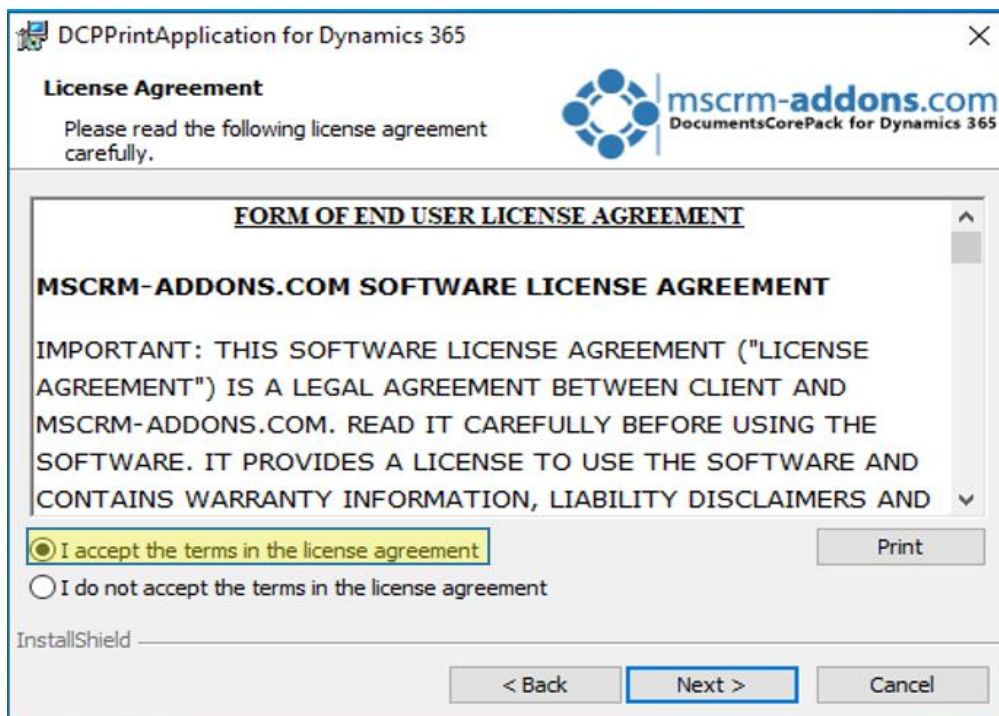


Figure 14: End User License Agreement (EULA)

3.1.2 Change the installation folder

If you want to change the installation folder please hit the **1 [Change]**-button to specify a different installation path. Click on the **2 [Next >]**-button to continue.

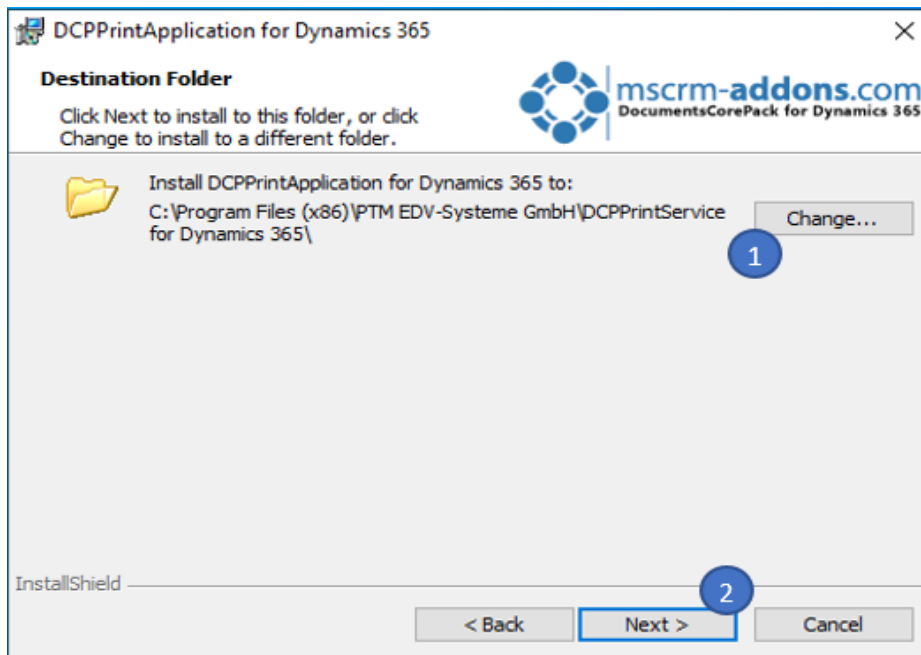


Figure 15: Change installation folder

3.1.3 Confirm the installation

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

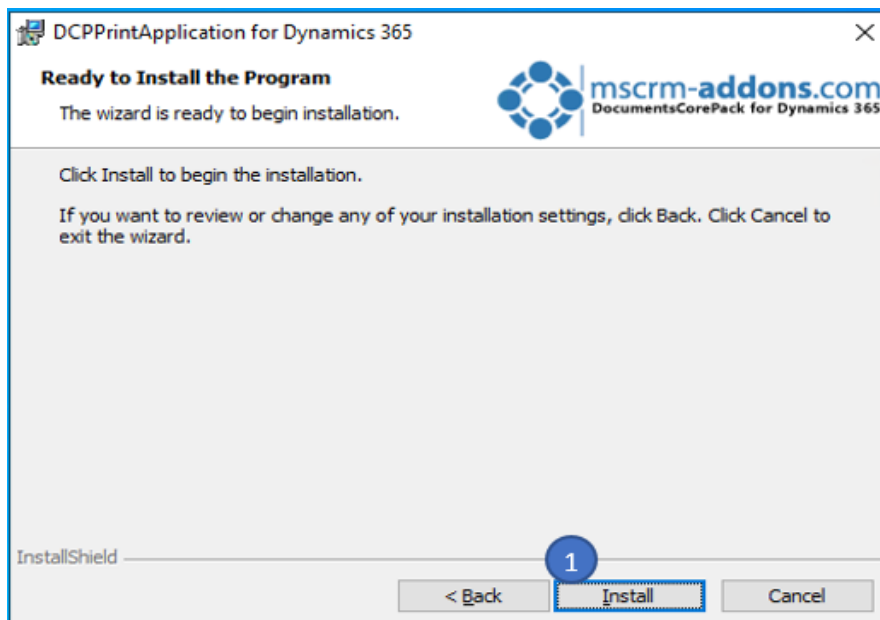


Figure 16: Confirm the installation

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

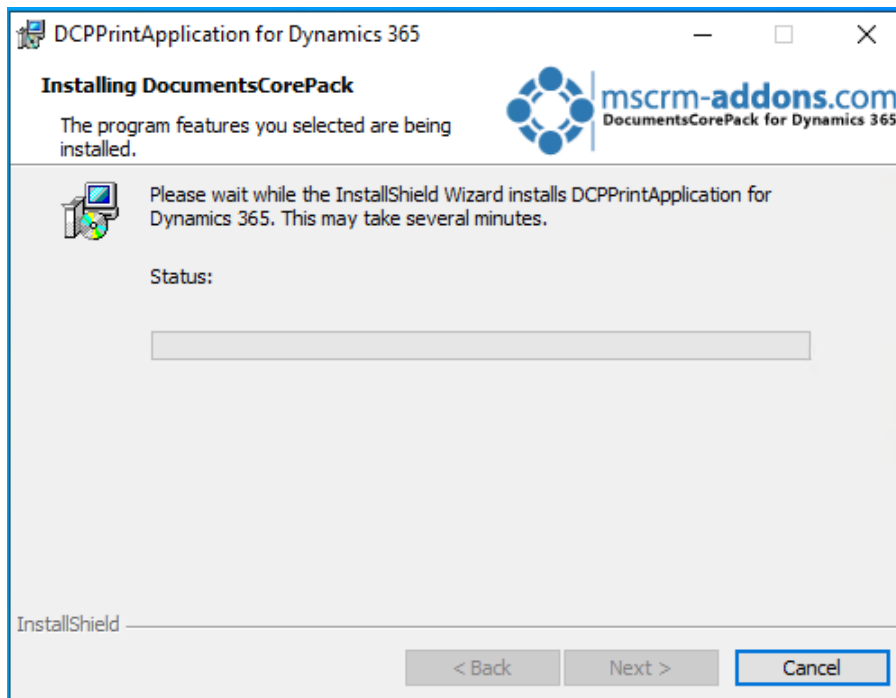


Figure 17: Installation status Connect to Dynamics 365

3.1.4 Connect to Dynamics 365

Next, you have to configure your Dynamics 365 server. Therefore, you have to select your **1** Dynamics 365 Type (Online in this case), enter your **2** Dynamics 365-Url and add your login credentials by filling in the fields your **3** username and password.

Click on the **4** **[Retrieve all]**-button and as soon as the organizations are retrieved, choose one and press the **5** **[OK]**-button, as you can see in the figure below.

Logon information

Welcome to your Dynamics 365 Connection setup.

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

Dynamics 365 Connection Advanced Settings Log

Existing Profiles [HKLM] https://crm306852.crm4.dynamics.com Manage

Select your Dynamics 365 Type

☐ OnPremise ☐ IFD/Hosted **1** ☒ Online ☐ AppAccess

Dynamics 365 Server-Url:

https://crm306852.crm4.dynamics.com **2** ✓

Authenticated as:

☐ Use default Credentials admin@CRM306852.onmicrosoft.com ☐ Prefer Server2Server authentication

Username admin@CRM306852. **3** Domain **3** Password

4 Retrieve all

Organization information:

Friendly name	Unique name	ServiceURL
Contoso	org858e3467	https://crm306852.crm4.dynamics.com/XRMServices/...

5 OK Cancel

Figure 18: Dynamics 365 Connection setup

3.1.5 Finish the installation

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

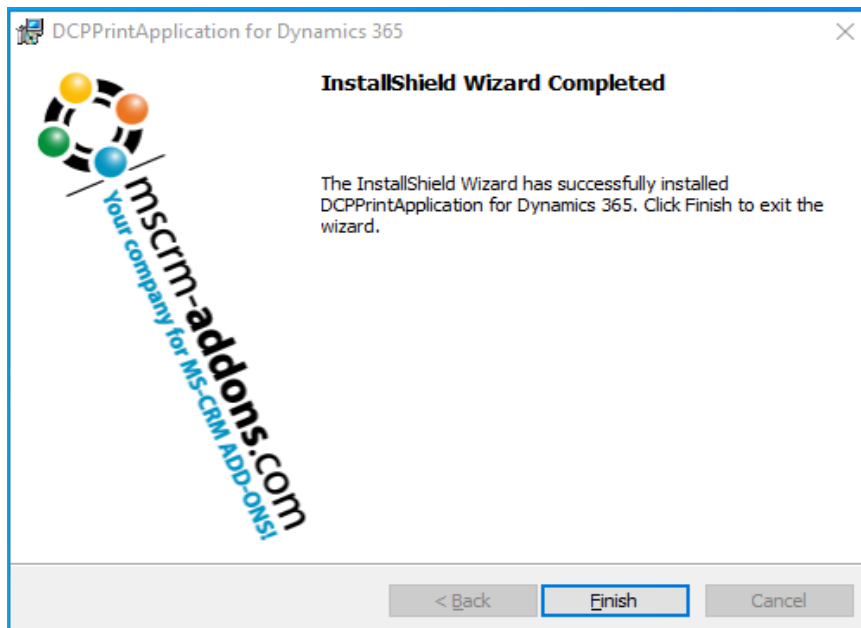


Figure 19: Finish installation

3.2 DCPPrintApplication Configuration

After finishing the installation, the DCPPrintApplication Configuration window opens. Within the following chapter, you will be provided with an overview of the different tabs and their functionality.

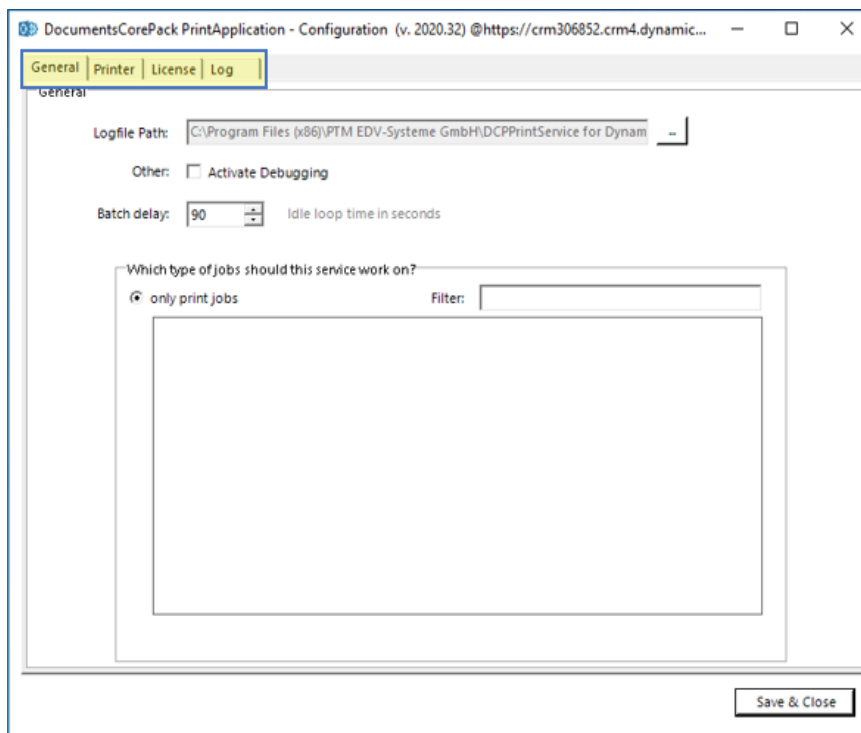


Figure 20: DCPPrintApplication Overview-tabs

3.2.1 The General-tab

The *General tab* provides you with the opportunity to set the general settings of your future application (see figure above). Here you have the possibility to activate debugging, set a batch delay (90 seconds is set per default, which is the delay between the application checking for new print jobs).

You can also add & remove printers, that your application will use.

3.2.2 The Printer-tab

The *Printer-tab* provides you with the possibility to create a ① new configuration, edit an existing one, copy a configuration and change the settings and also to ② delete configurations.

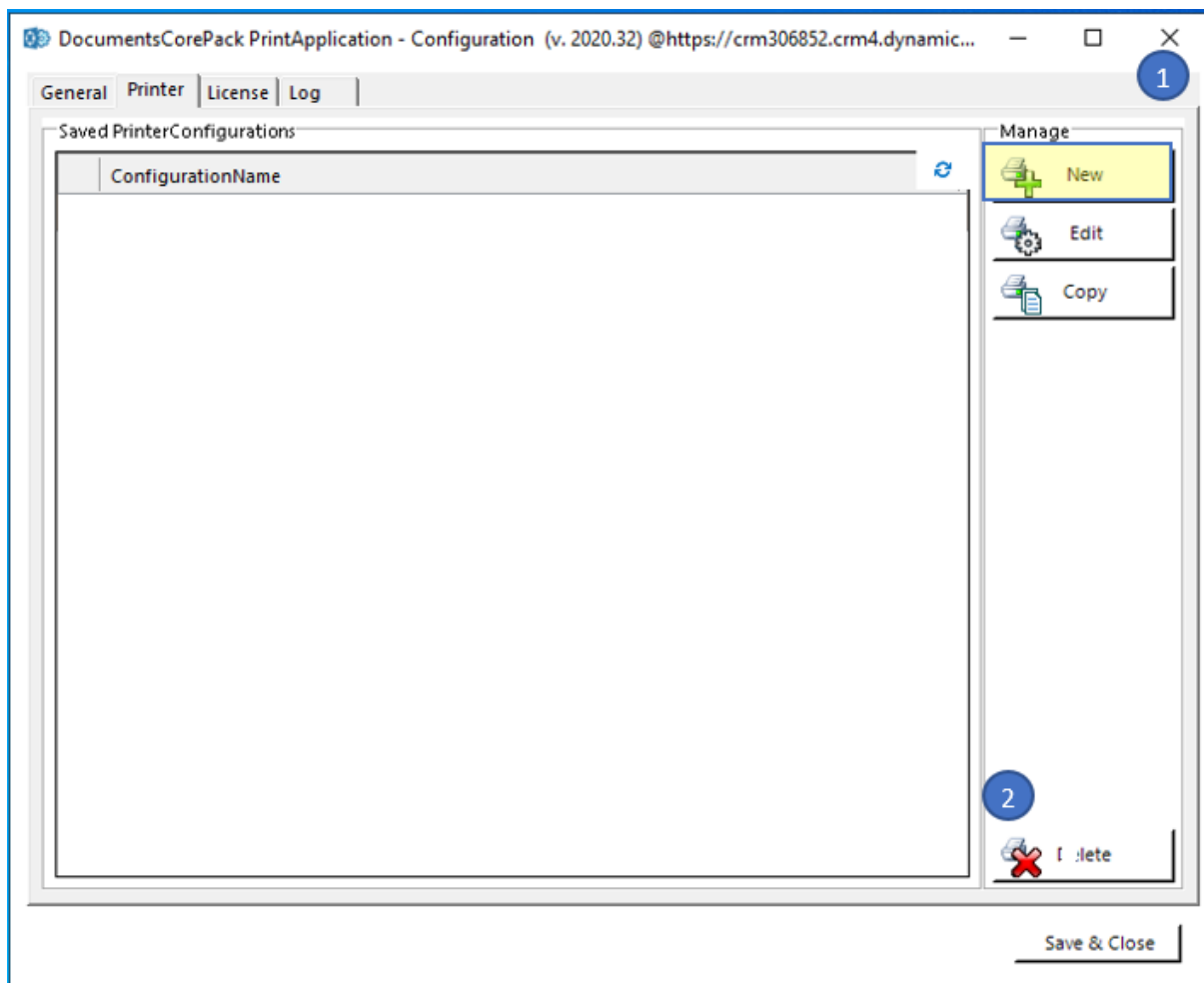


Figure 21: DCPPrintApplication Printer-tab

In order to create a new configuration, click on the **[New]**-button in the *Printer*-tab, highlighted in yellow. This action will open the following dialog. Here you have to:

- 1 Specify a configuration name to be able to create a printer configuration. The configuration name (highlighted in yellow below) consists of **printer@username** (the user which has access to the local printer) + **computer name** (the computer on which the application is running)
- 2 Select the printer from the drop-down menu. You can only use the printer created with your user and your machine.
- 3 Hit the **[Save & Close]**-button.

AutoMerge - [Local Printer / Google CloudPrint - MANAGER]

Printer Configuration - General

Configuration name: **Printer@kognis_KO-VM** 1

Description:

Use Local Printer |

Printer Settings

Printer name: **Canon iB4100 series-2 (Canon iB4100 series-2)** 2

Capability Settings

Color: Monochrome [v] [x] Use printer default

Copies: 1 [v] [x] Use printer default

Duplex: Default [v] [x] Use printer default

EvenOddFilter: EvenAndOdd [v] [x] Use printer default

Orientation: Portrait [v] [x] Use printer default

PaperSizes: A4 [v] [x] Use printer default

PaperSources: Automatically select [v] [x] Use printer default

Print Selection: (e.g. 1-3;4,7). Leave empty to print all

TestPage (PDF) [v] 3 Save & Close Cancel

Figure 22: Configure a printer

After saving, you will see the saved printer configuration in the *Printer*-tab.

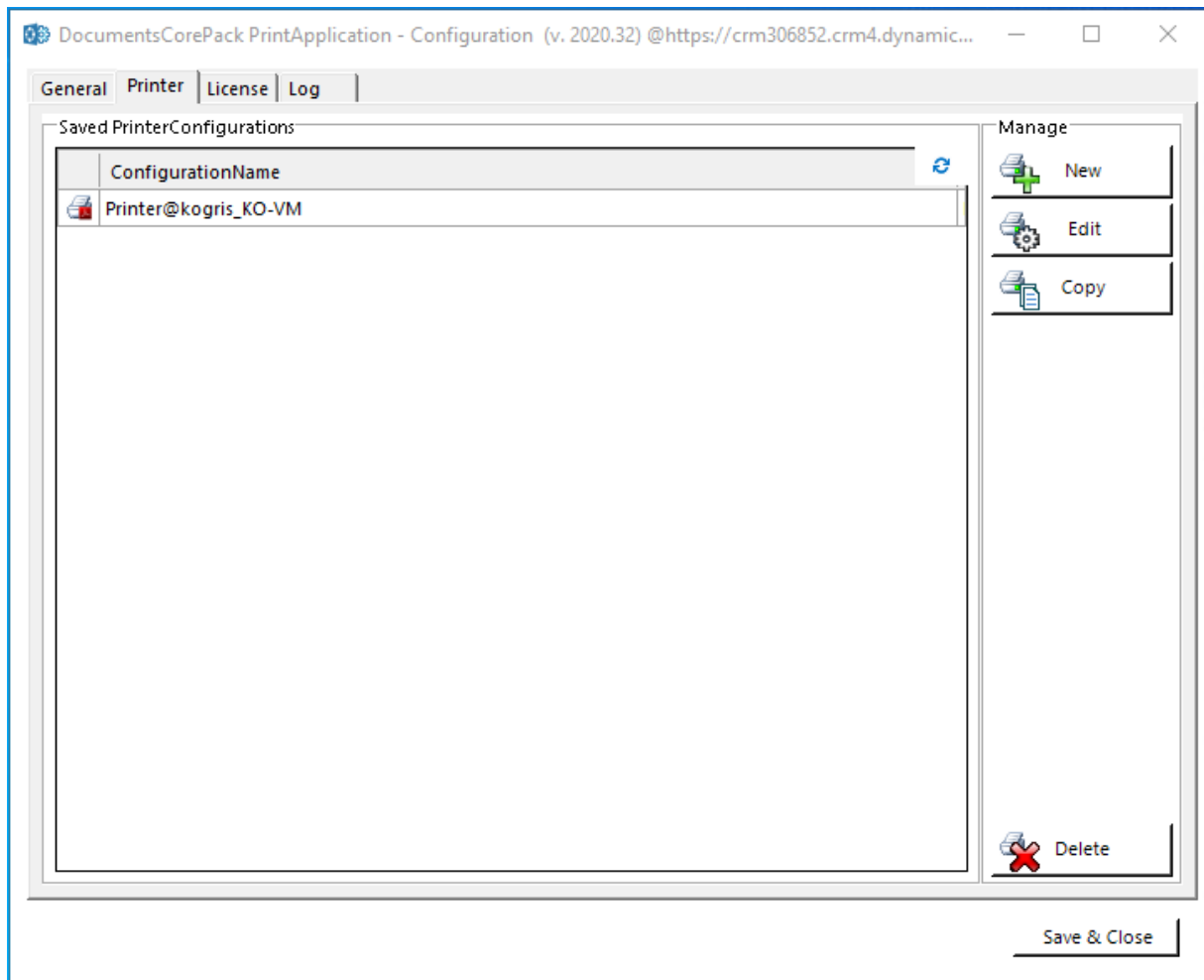


Figure 23: DCPPrintApplication Printer-tab: Configured printer

The saved printer configuration is also automatically added in the *General*-tab in the Filter-area as you can see in the figure below. To remove a printer, please select it and click on Delete on your keyboard.

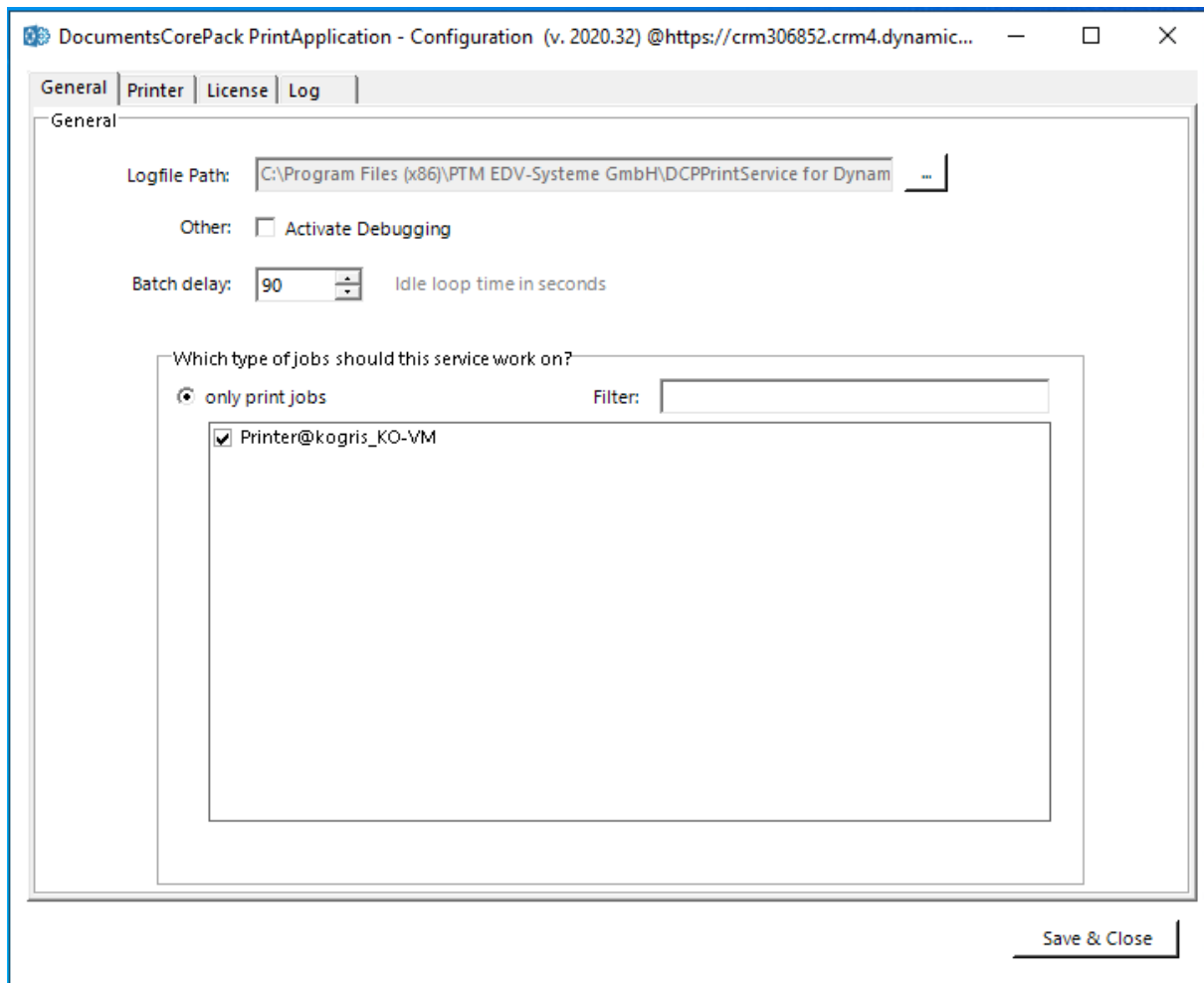


Figure 24: DCPrintApplication General-tab/ Configured printer

3.2.3 The License-tab

The *License-tab* enables you to quickly check your license state. If the license is invalid, the application will not start. For more information on the license manager, please have a brief look at our [Licensing Guide](#).

3.2.4 The Log-tab

The log provides an excerpt of the DCPrintApplication event log, filtered for this specific application. This helps you to identify any issues with the application.

Hit the **[Save & Close]**-button to finish the DCPrintApplication configuration. You will now find the DocumentsCorePack Print Application in your system tray. Right-clicking on the icon brings up a context

menu, allowing you to connect to a different organization, open the config, restart the application, or quit it.

The installer also adds an autorun entry to your local user account, starting the DCP Print application with your windows.

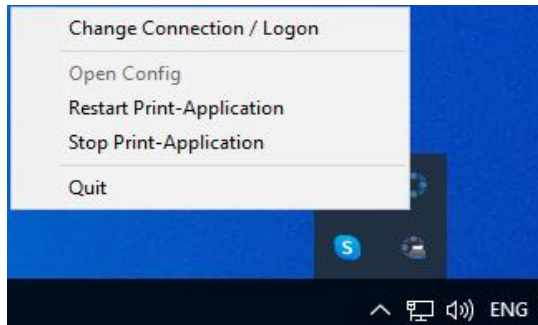


Figure 25: DCPPrintApplication in the Task Pane

If you now hit the **[Create Document]**-button, the DocumentsCorePack Dialog provides you with the new "Print document"-option, where you are able to select the printer you have configured before (highlighted in yellow).

Please notice: You can configure as many local printers as you like.

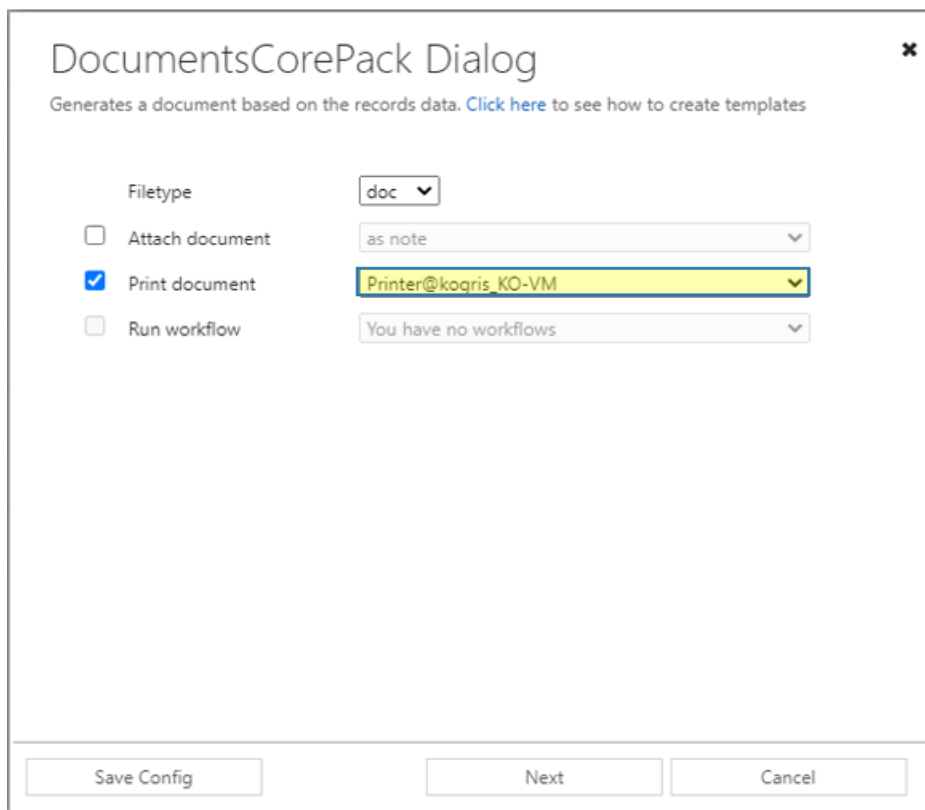


Figure 26: DocumentsCorePack Dialog – Print

4 Cloud Print and Integration

Cloud print infrastructure moves print infrastructure to a cloud. This offers advantages in that you save time and money on print installation and server installation, reduce maintenance and local updates, and add a great deal in terms of scalability, functionality, and accessibility. Therefore, they can be used from any web app regardless of whether these printers are installed on the device you are using and regardless if you have permission to install a printer on the device.

There are three major cloud print providers DocumentsCorePack integrates with. The following step-by-step guides illustrate how to configure printers via the respective provider:

- Microsoft Print
- Printix
- PrintNode

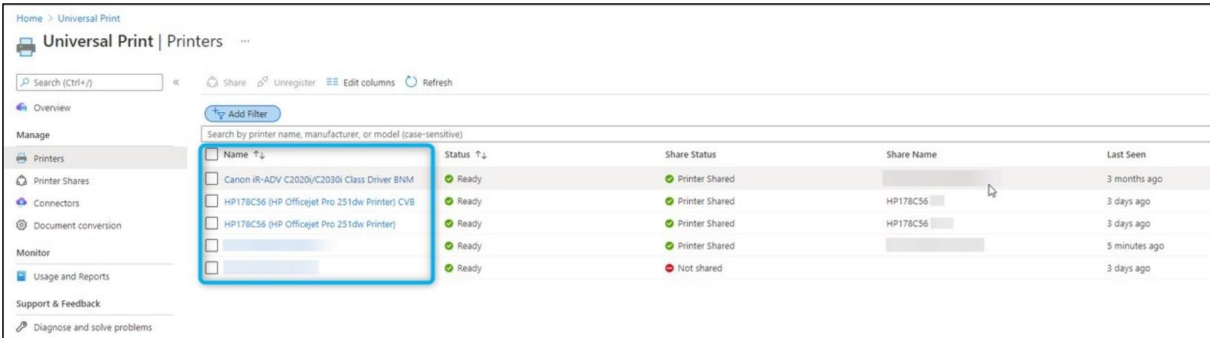
4.1 Microsoft Universal Print – Printer Configuration for DocumentsCorePack

This chapter explains how to configure “Microsoft Universal Print” printers to be used for printing with DocumentsCorePack.

4.1.1 Prerequisites

First of all you have to install, configure and license the [Microsoft Universal Print Connector](#) (see also [Microsoft licenses](#) for licensing information).

Within the [Microsoft Universal Print Dashboard](#) you can see all available printers.



Name	Status	Share Status	Share Name	Last Seen
Canon IR-ADV C2020/C2030 Class Driver BNM	Ready	Printer Shared		3 months ago
HP178C56 (HP Officejet Pro 251dw Printer) CV8	Ready	Printer Shared	HP178C56	3 days ago
HP178C56 (HP Officejet Pro 251dw Printer)	Ready	Printer Shared	HP178C56	3 days ago
	Ready	Printer Shared		5 minutes ago
	Ready	Not shared		3 days ago

Figure 27: Universal Print Dashboard

Important: After the installation, the following *Powershell script* must be executed on the computer where the Universal Print Connector was installed:


```
PS C:\windows\PrintConnectorSvc> .\UpdateConnectorConfigJson.ps1 -Feature Connector -Name enable-pdftoxps -Value true
```

4.1.2 Configure a new Microsoft Universal Print – printer for DocumentsCorePack

First, log in to the [DocumentsCorePack Service Configuration](#).



Your DocumentsCorePack Service needs to be configured to handle both: Document and Print Jobs. Double click on your service and ensure the Job Type is set to "Both"

Figure 28: Service configuration

Once confirmed, you can start by clicking **[configure cloud print]**.

Hello kog Version 2020.33.7522.2189.1

On this page you can configure DocumentsCorePack or AttachmentExtractor for your CRM organization. [Take a quick tour](#)

DocumentsCorePack: ServerBased (2) AttachmentExtractor (1)

Your available DocumentsCorePack services

ID	Name	Status	Job Type	Data (this m...	Organization	CRM	Instance
36...	526763938d1642779202dc57501a...	Stopped	Document G...	0 B	CRM499620	https://org742f3791.crm4.dy...	https://autom...
36...	unq5f4e519c608d4307a7e2d7024...	Running	Document G...	175,06 KB	CRM614680	https://org0f6f8b03.crm4.dy...	https://autom...

At the bottom of the interface, there is a toolbar with various icons, including a blue icon that is highlighted, likely representing the 'configure cloud print' action mentioned in the text.

Figure 29: DCP-Service Configuration

This *Cloudprint Configuration* opens. Press the **[+]**-button to continue.

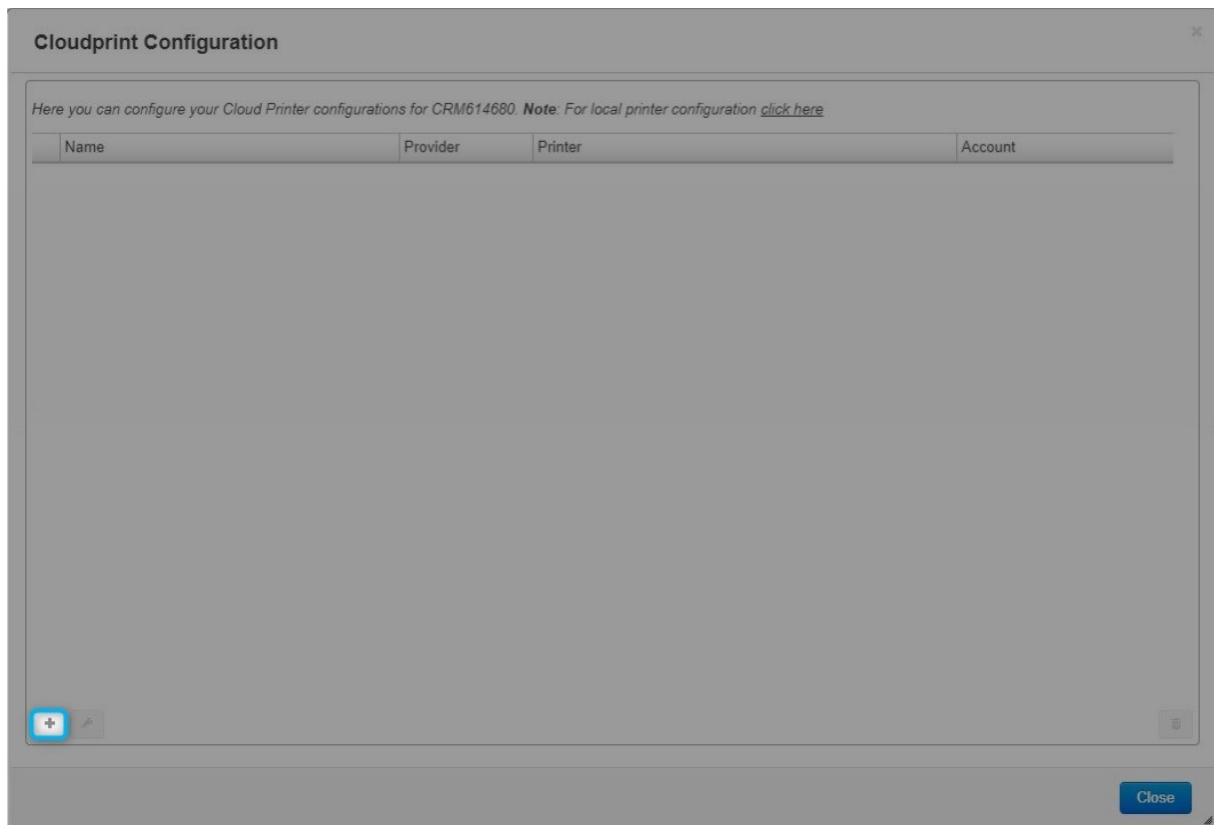


Figure 30: Cloudprint configuration

The „Configure Cloud Printer Configuration“-site is shown. To configure your Universal Print – Cloud Printer, you have to

- ① Select "Universal Print".
- ② Name your configuration.
- ③ Press „Get available printers“.

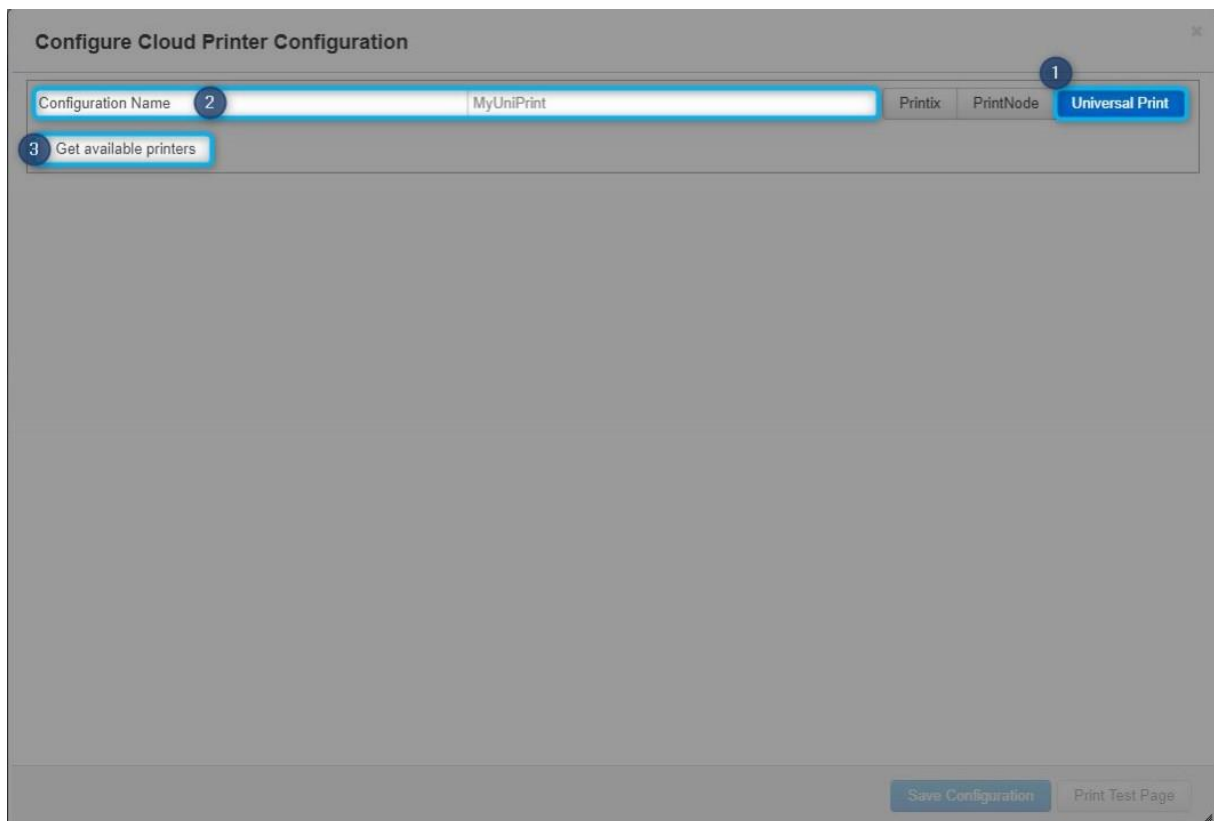


Figure 31: Get available printers

You are requested to sign in in your Microsoft account.



Figure 32: Sign in

All available printers in your environment are shown. Select the printer you want to configure and finish with a click on **[Save Configuration]**.



The “Printer Settings” allow to overrule some of the basic printer settings retrieved from Microsoft Universal Print. Options listed depend on your printer and/or print driver.

Configure Cloud Printer Configuration

Configuration Name: UniversalPrinter [Printix] [PrintNode] [Universal Print]

Get available printers

Available Printers

Printer Settings

Color ☒ Use Default

Copies ☒ Use Default

Orientation ☒ Use Default

PaperSize ☒ Use Default

Save Configuration Print Test Page

Figure 33: Available printers in your environment

Congratulations! The print application “Universal Print” is successfully installed.

Cloudprint Configuration

Here you can configure your Cloud Printer configurations for CanaryBuild (PTM EDV Systeme) Sandbox. Note: For local printer configuration click here.

Name	Provider	Printer	Account
Canon iB-4000	Universal Print	Canon iB-4000	

Close

Figure 34: Installed Universal Print

4.2 Printix – Printer Configuration for DocumentsCorePack

This chapter explains how to configure “Printix” printers to be used for printing with DocumentsCorePack.

4.2.1 Prerequisites

You have to be a Printix customer to use this application and printers have to be available in the Printix-portal (as can be seen in Figure 1). Learn how to configure your printer [here](#).

Next we need to get a Client ID, a Client Secret and a Tenant ID to enable printing via DocumentsCorePack. You can get this information as follows:

Login to your Printix dashboard: [https://\[customername\].printix.net/admin/#/dashboard](https://[customername].printix.net/admin/#/dashboard)

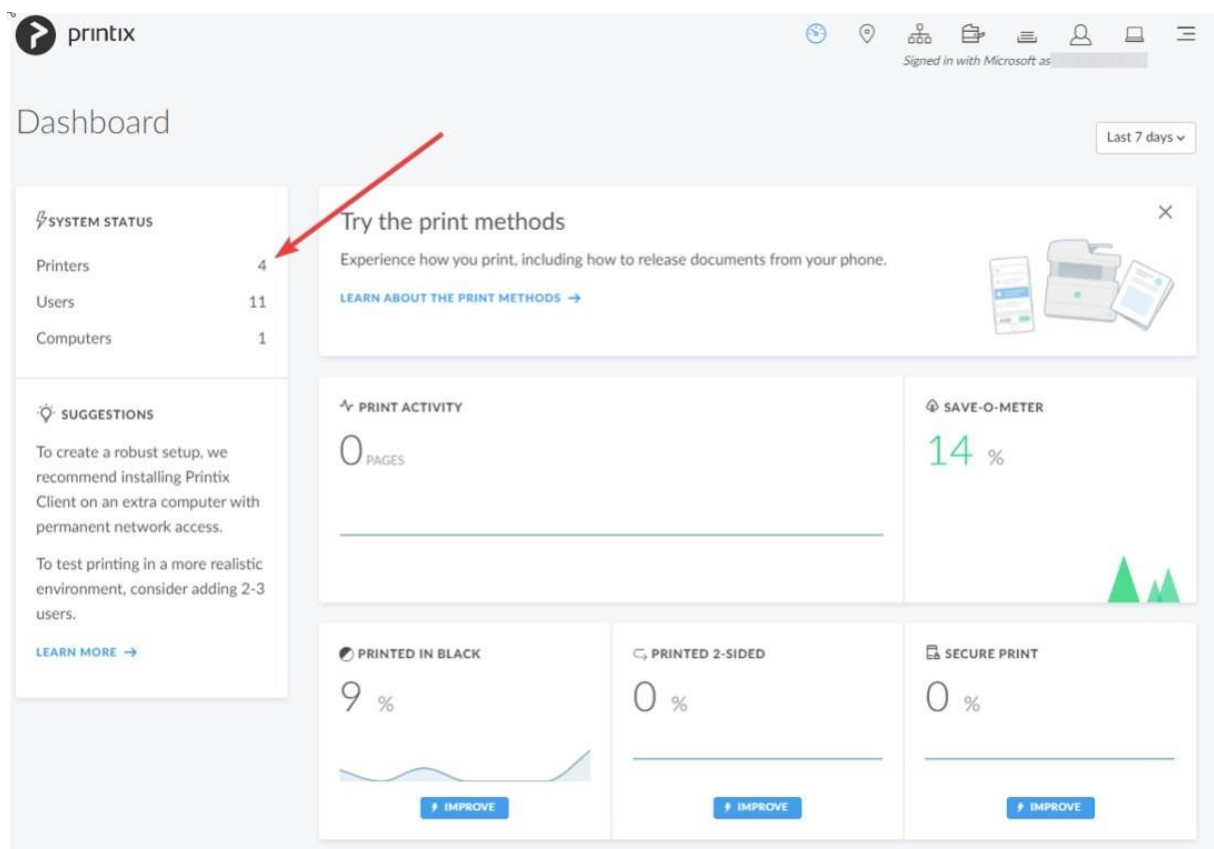


Figure 35: Printix dashboard

Browse to "Printix Cloud Print API"

- 1 Open the drop-down
- 2 Select Software

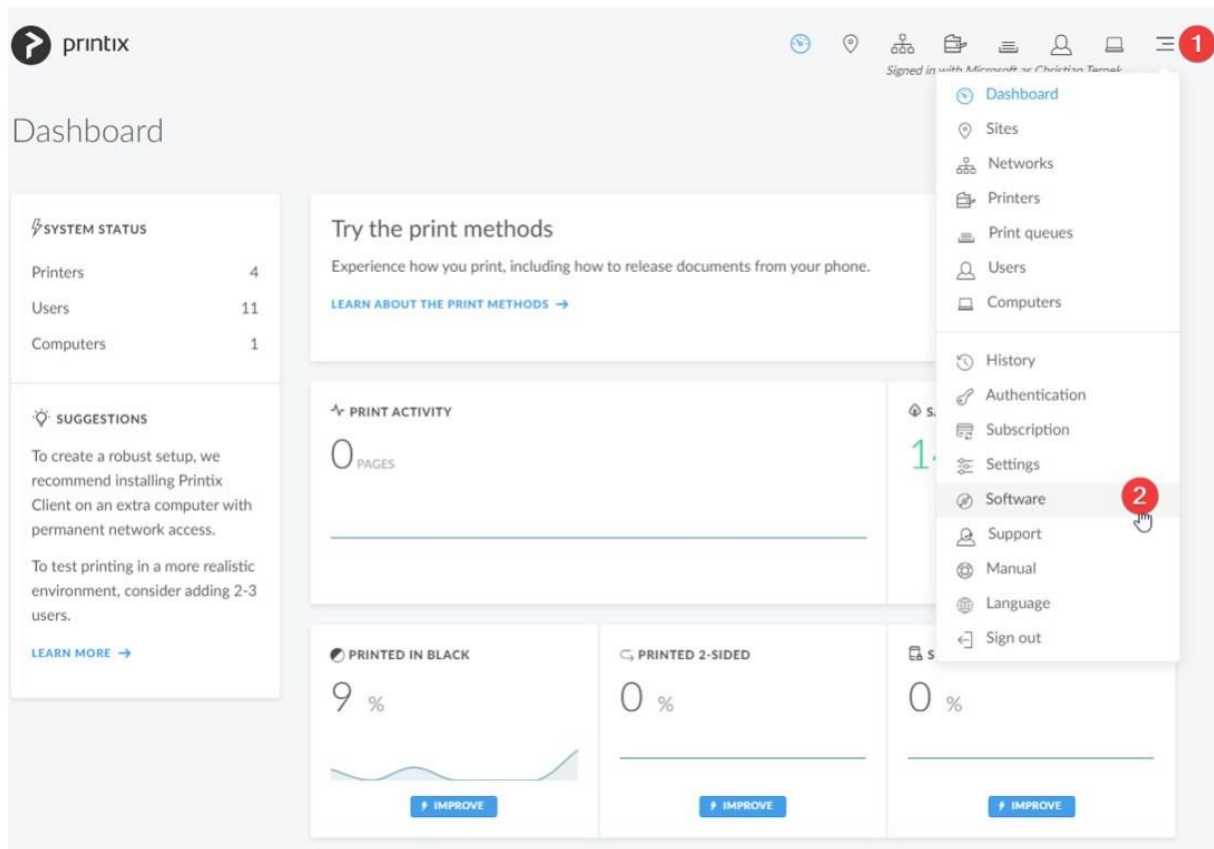


Figure 36: Printix dashboard

This site opens. Now select the **1** "Printix Cloud Print API".

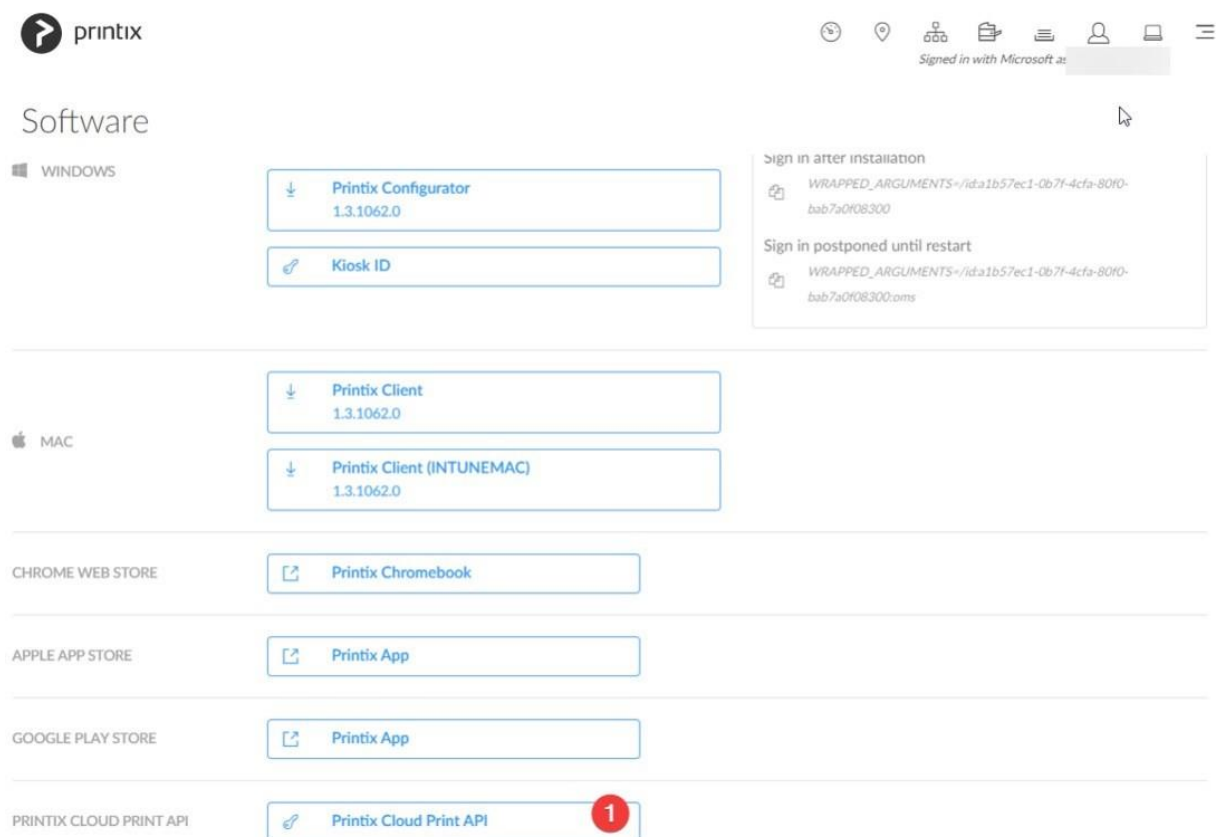


Figure 37: Printix – Software

Generate API Keys: A window opens. Provide a name for your API key (e.g. DCP_printerAPI)

The screenshot shows a window titled "Printix Cloud Print API" with a close button (X) in the top right corner. Inside the window, there's a "Name" label above a text input field. Below the input field, there's a "Learn more" link with an external link icon. Below the link, there's a checkbox with a blue checkmark and the text "I accept". At the bottom right, there's a green "Submit" button.

Figure 38: Printix Cloud Print API

Here is where you get the *Client ID*, *Client Secret* and the *Tenant ID*. This information is needed in the next step as outlined below.

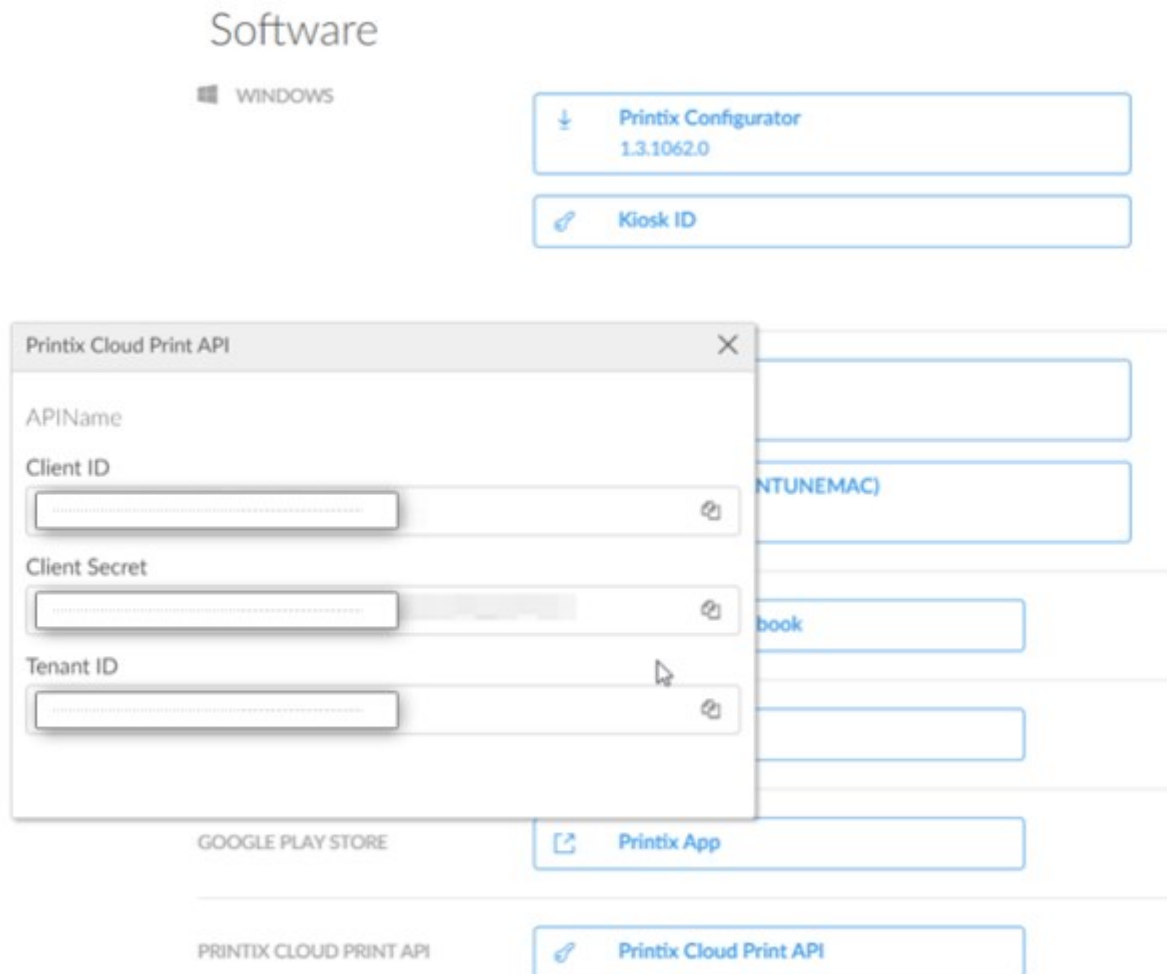


Figure 39: Client ID, Client Secret, Tenant ID

4.2.2 Configure a new "Printix" Printer for DocumentsCorePack

First, log in to the [DocumentsCorePack Service Configuration](#).



Your DocumentsCorepack Service needs to be configured to handle both: Document and Print Jobs. Double click on your service and ensure the Job Type is set to "Both"

This *Cloudprint Configuration* opens. Press the **[+]**-button to add a printer.

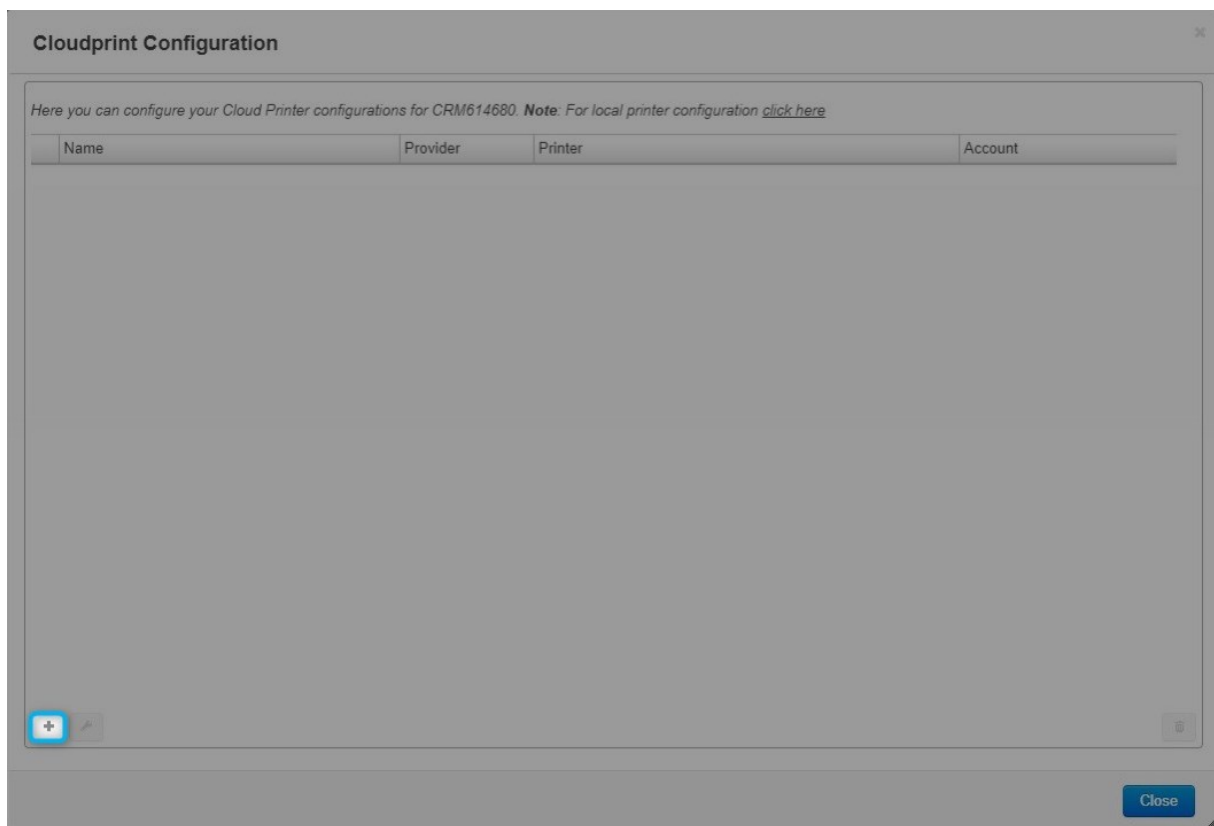


Figure 42: Cloudprint Configuration

The „*Configure Cloud Printer Configuration*“-site is shown. To configure your Cloud Printer, you have to

- ① select "Printix" first.
- ② Name your configuration.
- ③ Type in your credentials like "Client ID" and "Client Secret".
- ④ Press „*Get available printers*“.

Configure Cloud Printer Configuration

Configuration Name: Google

Credentials

Client ID: Client Secret:

Available Printers:

Printer Settings ?

Color	<input checked="" type="checkbox"/> Use Default	Monochrome
Copies	<input checked="" type="checkbox"/> Use Default	1
Duplex	<input checked="" type="checkbox"/> Use Default	Default
Orientation	<input checked="" type="checkbox"/> Use Default	Portrait
Paper Sizes	<input checked="" type="checkbox"/> Use Default	A4

Figure 44: Printer Settings

It's done, your printer is configured and good to go!

Cloudprint Configuration

Here you can configure your Cloud Printer configurations for CRM614680. **Note:** For local printer configuration [click here](#)

Name	Provider	Printer	Account
mscrmaddons	Printix	Canon iB4100 series	c197c524-eed3-49e5-a5fe-a...

Figure 45: Successful Printer Configuration

4.3 PrintNode – Printer Configuration for DocumentsCorePack

This chapter explains how to configure “PrintNode” printers to be used for printing with DocumentsCorePack.

4.3.1 Prerequisites

You have to be a *PrintNode* customer to use this application. Information on how to configure *Printnode* can be found [here](#).

Once configured we need to get the API Keys. Therefore, open the [PrintNode Dashboard](#).

- 1 Select in the menu on the left side “Print Something” and then click on “API Keys”

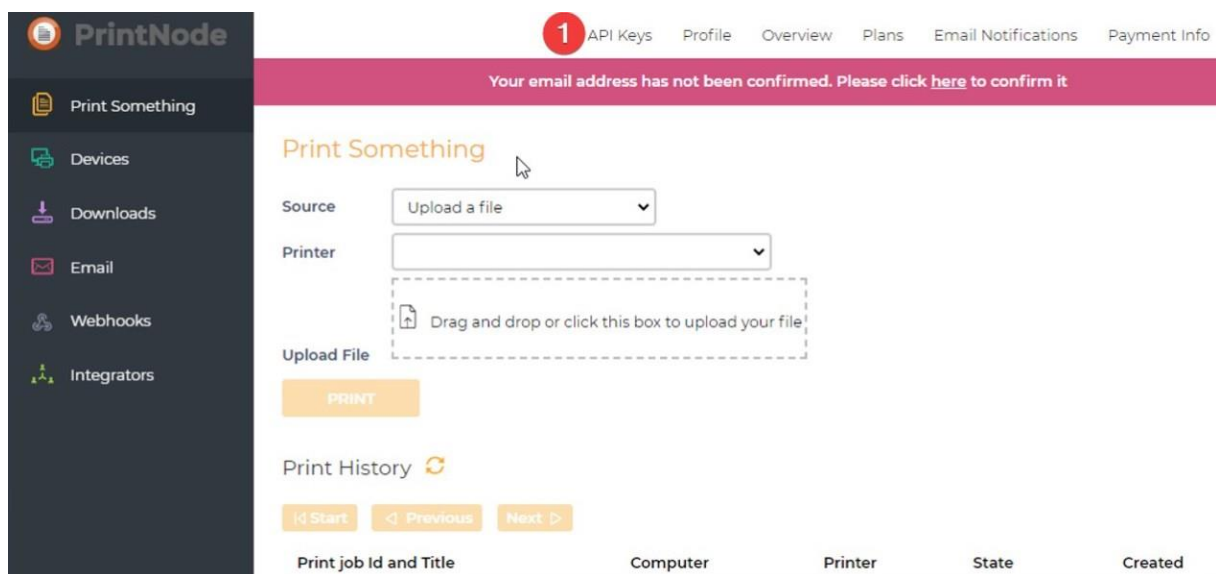


Figure 46: PrintNode Dashboard

Provide a name your API Key and press the **[Create]**-button.

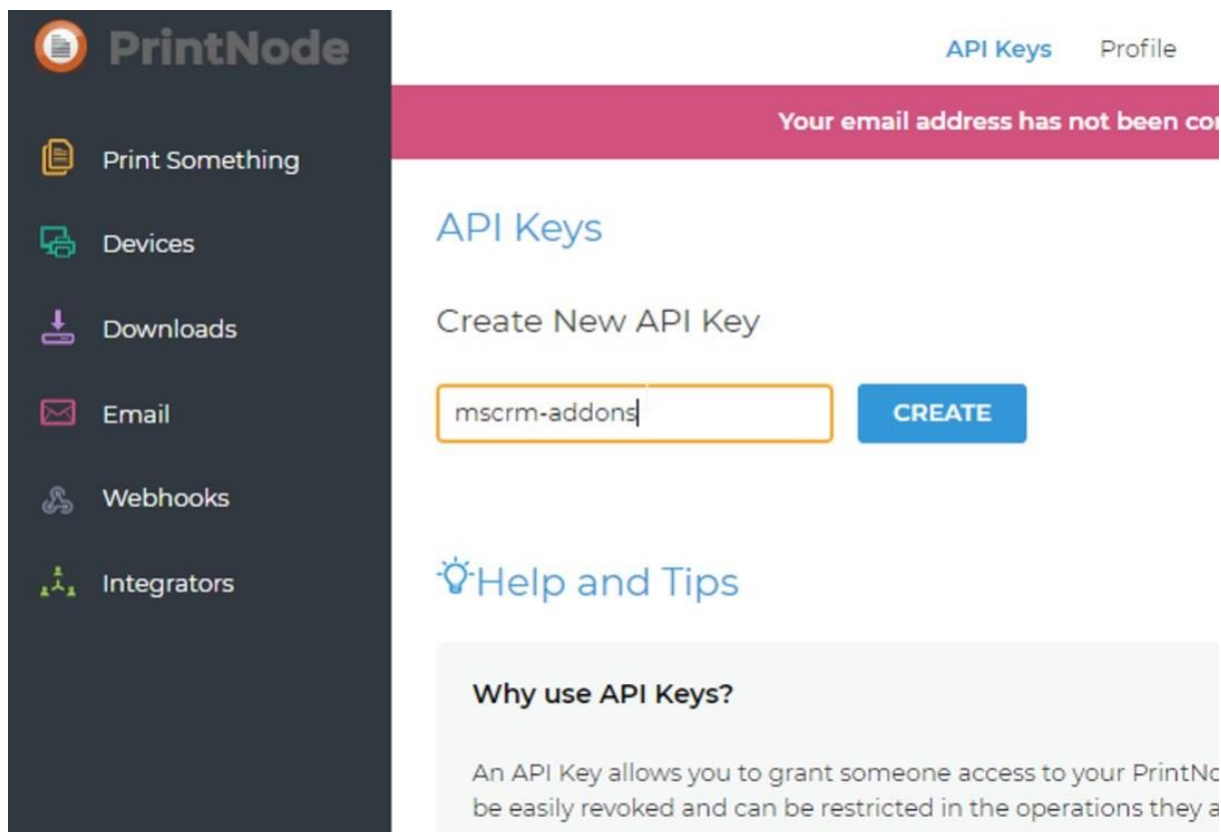


Figure 47: Generated API Key

Your API Key is generated. This Key is needed in the next step as outlined below.

4.3.2 Configure a new "PrintNode" Printer for DocumentsCorePack

First, log in to the [DocumentsCorePack Service Configuration](#).



Your DocumentsCorepack Service needs to be configured to handle both: Document and Print Jobs. Double click on your service and ensure the Job Type is set to "Both"

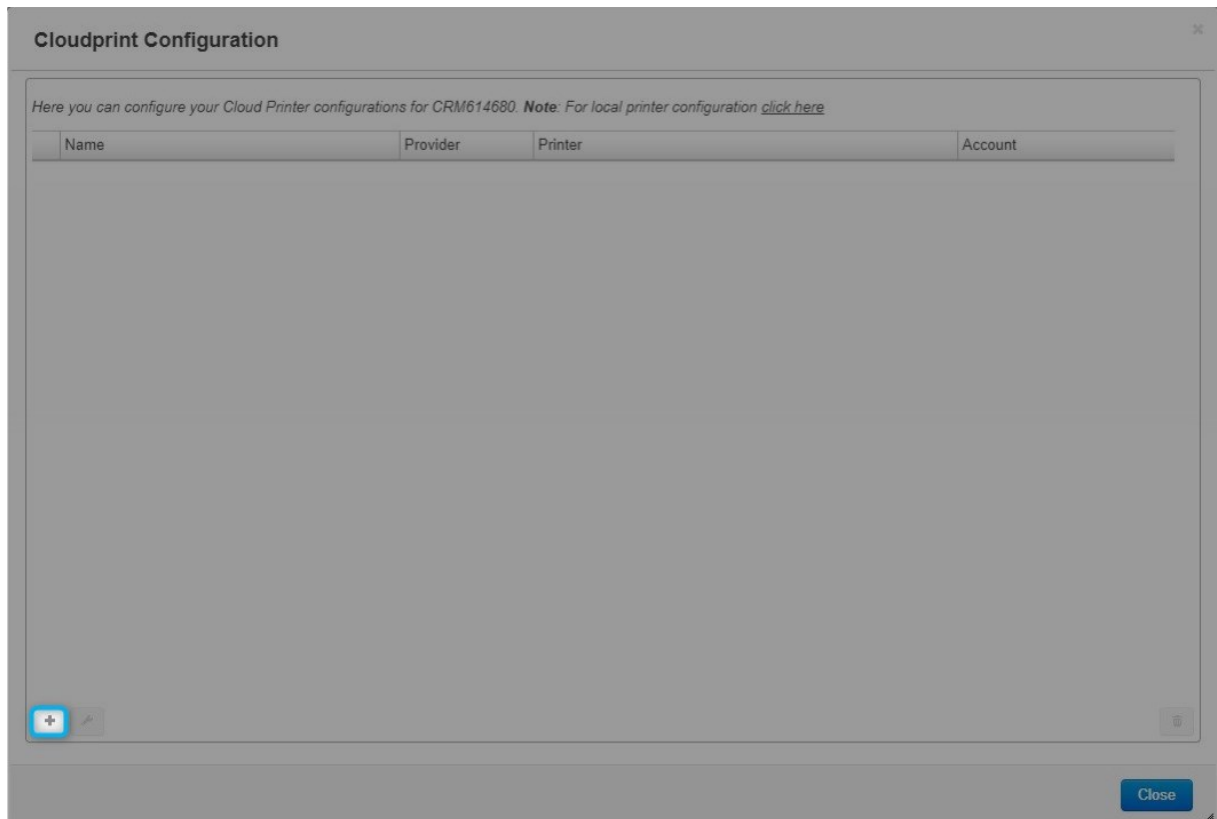


Figure 50: Cloudprint configuration

The „Configure Cloud Printer Configuration“-site is shown. To configure your PrintNode – Cloud Printer, you have to

- ① Select "PrintNode".
- ② Name your configuration.
- ③ Enter the „API Key“ you generated earlier and
- ④ Press „Get available printers“.

Configure Cloud Printer Configuration

Configuration Name Printix **PrintNode** Universal Print

Credentials

API Key

Figure 51: Configure PrintNode

The “Available Printes” drop-down lists all printers received from PrintNode. Select the printer you want to configure.

Configure Cloud Printer Configuration

Configuration Name Printix **PrintNode** Universal Print

Credentials

API Key

Available Printers

Printer Settings

Bin ☐ Use Default

Color ☒ Use Default

Copies ☒ Use Default

Duplex ☒ Use Default

Paper Sizes ☒ Use Default

Figure 52: Available printers

"Printer Settings" - Here you can find a list of all configurable capabilities of your printer. Options listed depend on your printer and/or print driver.

Please note: If you want to change the specific setting, untick the checkbox to unlock. Then you are able to modify the value.

If the settings correspond with what you need, press the **[Save Configuration]**-button. It's done, your printer is configured and good to go!

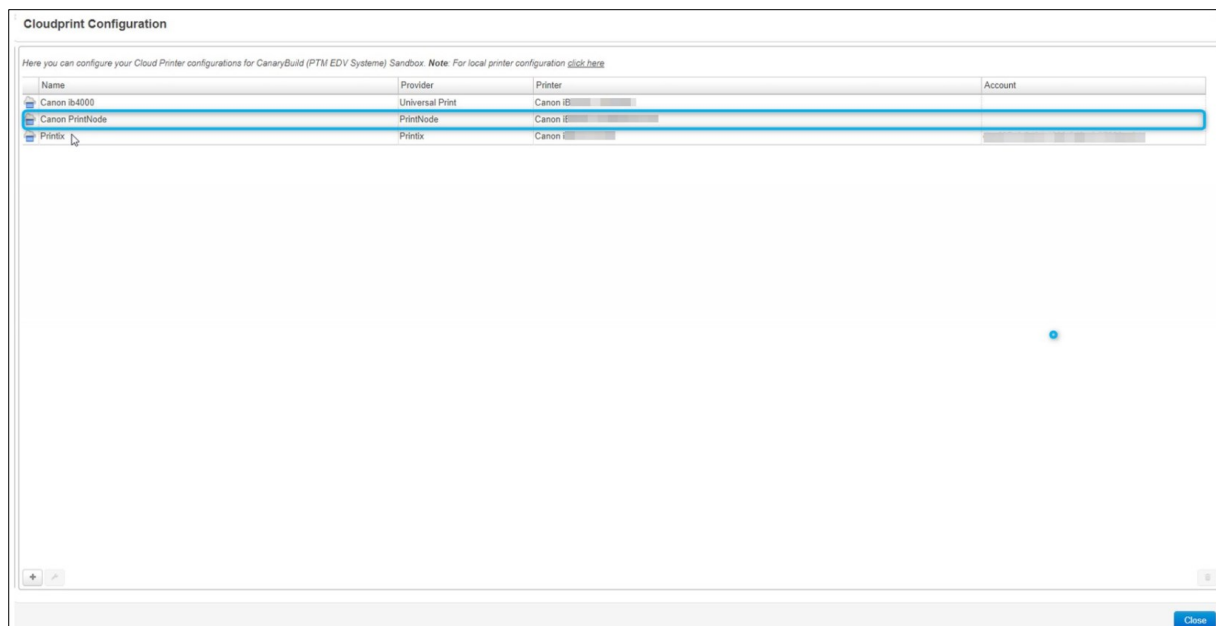


Figure 53: Successfully installed PrintNode Printer

List of figures

Figure 1: Start service configuration	6
Figure 2: Create a new service or select an existing one.....	6
Figure 3: Create a new service or select an existing one.....	7
Figure 4: Select the CRM type	8
Figure 5: Connection success.....	8
Figure 6: Possible issue with CRM connection dialog	8
Figure 7: Possible issue with CRM connection dialog	9
Figure 8: CRM connection setup	10
Figure 9: Click on the start service button.....	11
Figure 10: Select a printer	11
Figure 11: Configure a printer	12
Figure 12: Local printer test pages	13
Figure 13: Installer DCPPrintApplication for Dynamics 365	13
Figure 14: End User License Agreement (EULA).....	14
Figure 15: Change installation folder	15
Figure 16: Confirm the installation	15
Figure 17: Installation status Connect to Dynamics 365.....	16
Figure 18: Dynamics 365 Connection setup	17
Figure 19: Finish installation.....	18
Figure 20: DCPPrintApplication Overview-tabs.....	18
Figure 21: DCPPrintApplication Printer-tab	19
Figure 22: Configure a printer	20
Figure 23: DCPPrintApplication Printer-tab: Configured printer	21
Figure 24: DCPPrintApplication General-tab/ Configured printer	22
Figure 25: DCPPrintApplication in the Task Pane	23
Figure 26: DocumentsCorePack Dialog – Print.....	23
Figure 27: Universal Print Dashboard	24
Figure 28: Service configuration.....	25
Figure 29: DCP-Service Configuration.....	25
Figure 30: Cloudprint configuration.....	26
Figure 31: Get available printers.....	27
Figure 32: Sign in	27
Figure 33: Available printers in your environment.....	28
Figure 34: Installed Universal Print	28
Figure 35: Printix dashboard	29
Figure 36: Printix dashboard	30
Figure 37: Printix – Software	31
Figure 38: Printix Cloud Print API.....	31
Figure 39: Client ID, Client Secret, Tenant ID	32
Figure 40: Service configuration.....	33
Figure 41: DCP-Service Configuration.....	33
Figure 42: Cloudprint Configuration.....	34

Figure 43: Configure Cloud Printer Configuration	35
Figure 44: Printer Settings.....	36
Figure 45: Successful Printer Configuration.....	36
Figure 46: PrintNode Dashboard	37
Figure 47: Generated API Key.....	38
Figure 48: Service configuration.....	39
Figure 49: DCP-Service Configuration.....	39
Figure 50: Cloudprint configuration.....	40
Figure 51: Configure PrintNode.....	41
Figure 52: Available printers.....	41
Figure 53: Successfully installed PrintNode Printer	42

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