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

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

DocumentsCorePack Installation Guide for MS Dynamics 365

April 2023

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

Table of Contents

PREAMBLE **4**

TARGET AUDIENCE **4**

SUPPORTED WEB BROWSERS AND VERSIONS **4**

1. HOW TO INSTALL THE DOCUMENTSCOREPACK **5**

1.1. PREREQUISITES 5

BEFORE YOU START THE INSTALLATION, YOU HAVE TO DOWNLOAD THE DOCUMENTSCOREPACK APPLICATION. YOU CAN DOWNLOAD FILES HERE. 5

1.2. INSTALL DIRECTLY ON A DYNAMICS 365 ON-PREMISE SERVER 5

2. INSTALLATION OF THE DOCUMENTSCOREPACK SERVER **6**

2.1. ONLINE SERVICE CONFIGURATION 6

2.2. INSTALLATION 6

2.3. END USER LICENSE AGREEMENT (EULA) 8

2.4. CONFIRM THE INSTALLATION 8

2.5. INSTALL THE WINDOWS IDENTIFY FOUNDATION 10

2.6. CONFIGURE DYNAMICS 365 SERVER 12

..... 12

2.7. SECURITY ROLES 13

2.8. FINISH THE INSTALLATION 16

2.9. ORGANIZATION OVERVIEW 17

2.10. ORGANIZATION OVERVIEW – FUNCTION BUTTONS 18

2.11. CLIENT & SERVER BASED GENERATION SETTINGS 19

1.12. THE COMMAND BAR TAB 20

2.12.1. Client Based document generation 21

2.12.2. Server Based document generation 25

2.12.3. Command bar Configuration 26

1.13. THE GENERAL SETTING TAB 26

1.14. THE SHAREPOINT TAB 29

1.15. SERVICE CONFIGURATION 31

2.15.1 The General tab 31

2.15.2. The Dynamics 365 Connection Setup tab 33

2.15.3. The License tab 33

2.15.4. The Log tab 34

2.15.5. The Printer tab 35

1.16. LICENSING 36

1.17. UPGRADE 36

3. HOW TO INSTALL DOCUMENTSCOREPACK IN AN IFD/CLAIMS-BASED ENVIRONMENT **37**

4. TROUBLESHOOTING **42**

5. WINDOWS 12 WIF FRAMEWORK INSTALLATION (WINDOWSIDENTITYFOUNDATION) **43**

6. DOCUMENTSCOREPACK TEMPLATES **46**

6.1. HOW TO CREATE DOCUMENTSCOREPACK TEMPLATES 46

6.2. IMPORT/EXPORT EXISTING DOCUMENTSCOREPACK TEMPLATES 46

7. LANGUAGE SETTINGS FOR DOCUMENTSCOREPACK **50**

7.1. LANGUAGE SETTINGS ON THE CLIENT 50

7.1.1. Location of the Language Settings in the Client 50

7.1.2. Modify the UI on the Client 51

7.1.3. How to translate a language file 52

7.2. LANGUAGE SETTINGS ON SERVER 52
7.2.1. Location of the Language Settings on the Server 52
7.2.2. Location of the Language Settings on the Server 53
7.2.3. How to translate a language file 53
8. IMPORTANT INFORMATION 54
9. UNINSTALL DOCUMENTSCOREPACK SERVER COMPONENT 55
10. LIST OF FIGURES 57
11. CONTACT 58

Preamble

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

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

Target Audience

This guide is intended for users installing DocumentsCorePack for Microsoft Dynamics 365 with the following basic skills:

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

Supported Web Browsers and versions

Supported Web Browsers:

- Internet Explorer 10 and higher
- Chrome
- Edge
- Firefox

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

- Microsoft Dynamics 365
- Microsoft Dynamics CRM Online

1. How to install the DocumentsCorePack

You can install DocumentsCorePack on any supported operating system which is able to connect to your Dynamics 365 server. During the installation, you have to specify at least one organization where the DocumentsCorePack will be installed.

Additional organizations can be set up by the installation manager after the original setup has finished.

1.1. Prerequisites

Before you start the installation, you have to download the DocumentsCorePack Application. You can download files here.

1.2. Install directly on a Dynamics 365 On-Premise Server

When you want to use Dynamics 365, you can install DocumentsCorePack on every supported operating system. You must specify a valid Dynamics 365 profile. In this case, you have limited functionality of DocumentsCorePack. You cannot use the following features:

- SharePoint Folder and Site integration
- File Explorer integration

After the setup, you can start the DocumentsCorePack Configuration in the Windows Start menu to install and configure DocumentsCorePack in other Dynamics 365 organizations.

2. Installation of the DocumentsCorePack Server

This chapter explains how to install the Server component. It is important to ensure that the machine is online to the Dynamics 365 server.

2.1. Online Service Configuration

The setup allows users to configure DocumentsCorePack Document Generation for Microsoft Dynamics 365 Online without local installations. The service, as well as licensing, can be configured and maintained on our website.

For detailed information on OnPremise installations please read

Follow the links below for additional information:

- Start Trial/Configure Services for DocumentsCorePack for Microsoft Dynamics 365
- Watch our DocumentsCorePack ServerBased Online Configuration YouTube Video
- DocumentsCorePack User Guide

2.2. Installation

Run the "**DocumentsCorePack Server for MS Dynamics 365.exe**" setup file. You will see the following window:

Hit the ❶ **Next** button to continue with the license agreement.

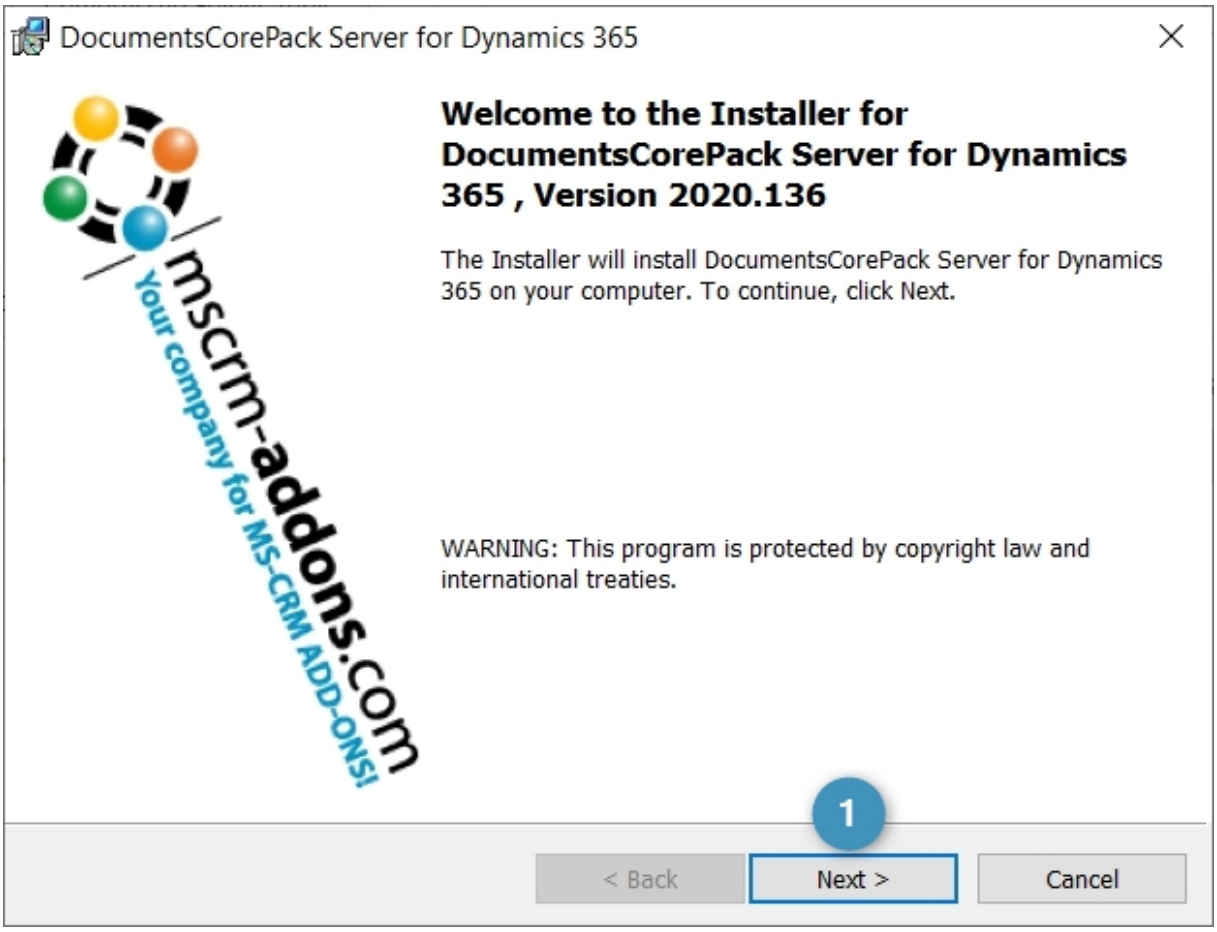


Figure 1: DocumentsCorePack installer for Dynamics 365

2.3. End User License Agreement (EULA)

Please accept the license agreement by checking the first checkbox and click on the **Next** button.

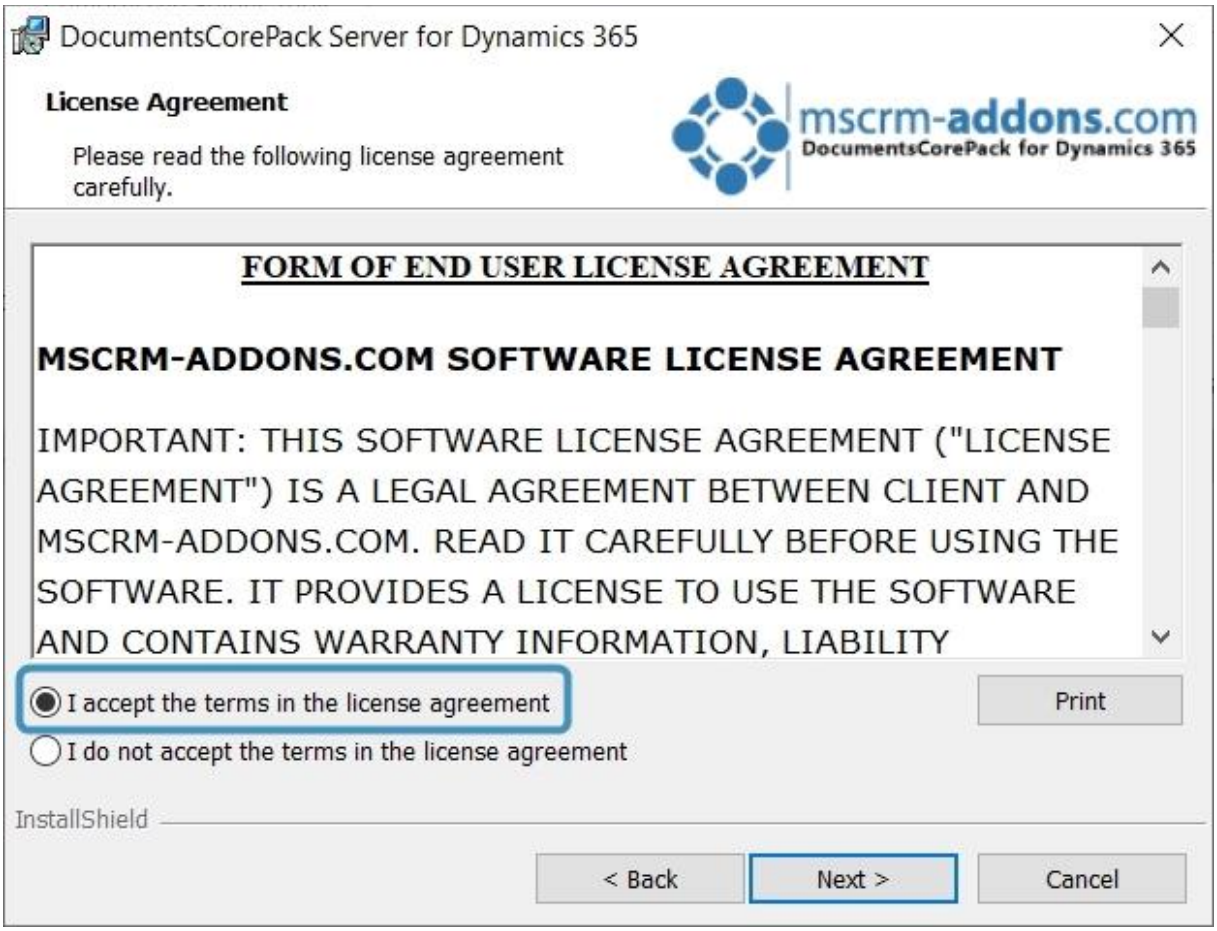


Figure 2: End User License Agreement (EULA)

2.4. Confirm the installation

If you want to change any of your installation settings, please hit the ❶ **Back** button or you can ❷ **Change** the installation folder as shown in the figure below. Click ❸ **Next** to proceed.

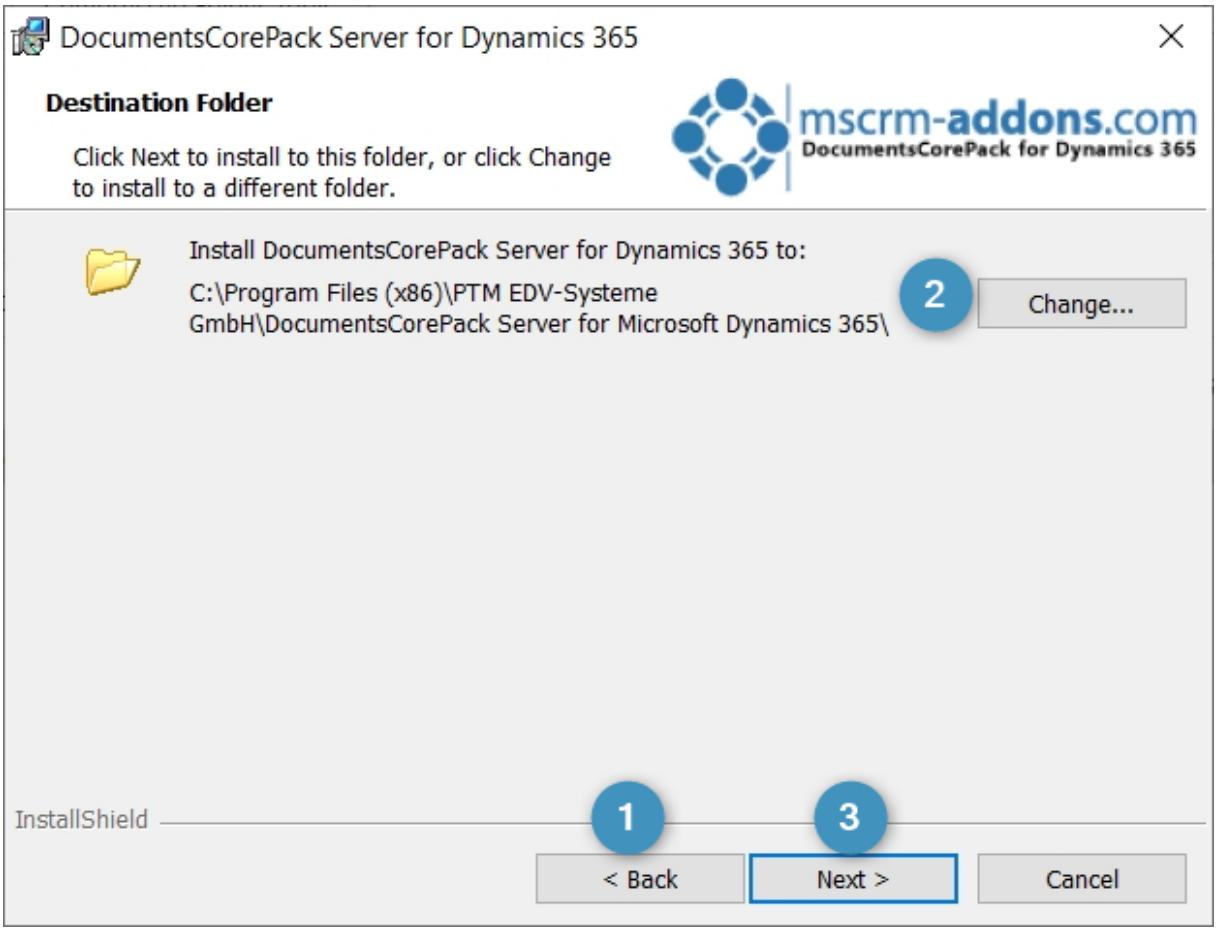


Figure 3: Confirm with Install

If you want to review or change any of your installation settings, click 1 **Back**. Click 2 **Cancel** to exit the wizard and 3 **Install** to proceed.

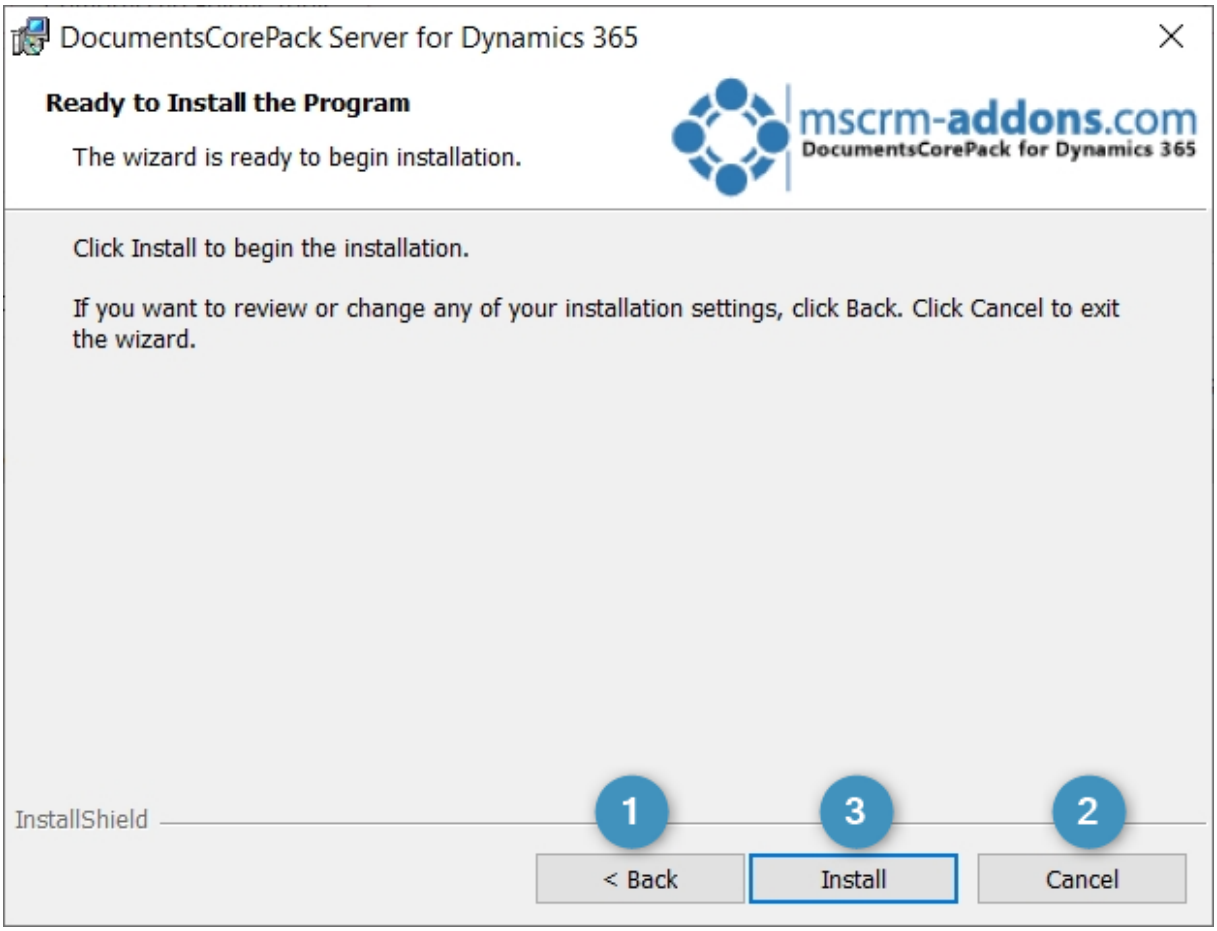


Figure 4: Install the program

2.5. Install the Windows Identify Foundation

To use the DocumentsCorePack Server for Microsoft Dynamics 365 you have to install the Windows Identify Foundation. This window will pop up when the Window Identify Foundation is not installed.

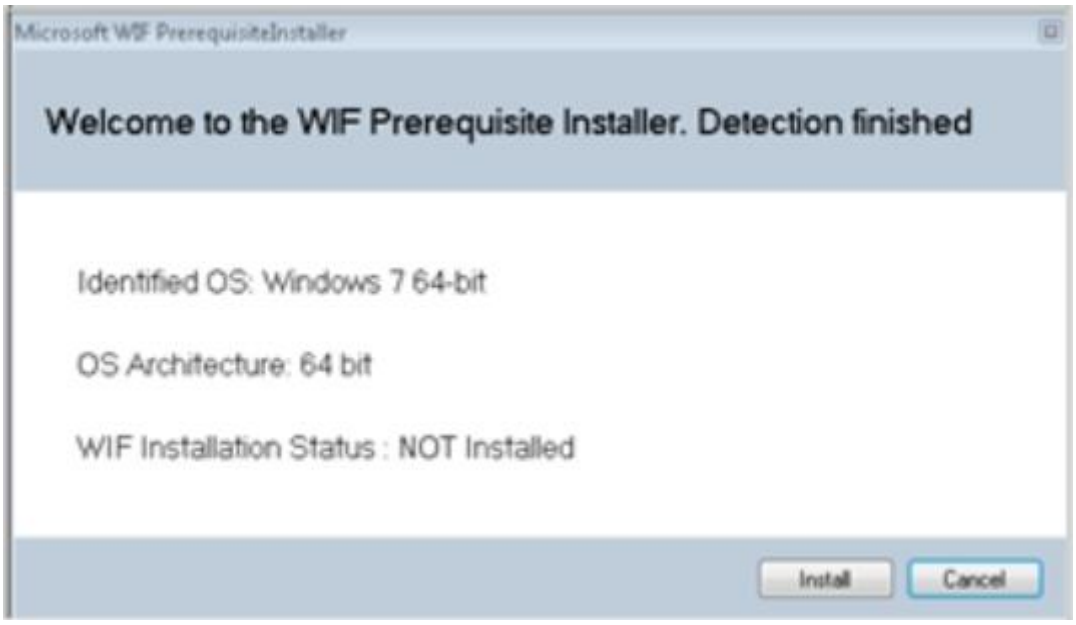


Figure 5: Install Windows Identify Foundation

2.6. Configure Dynamics 365 Server

Next, you must configure your Dynamics 365 server. Select your 1 **Existing Profile** or create a new profile and select your 2 **Dynamics 365 type**. Choose the 3 **Dynamics 365 Server-URL** and add your login credentials by filling in the 4 **Use default Credentials** like username, password and domain fields. Click on the 5 **Retrieve all** button and as soon as the organizations are retrieved, choose the respective one and press the 6 **OK** button.

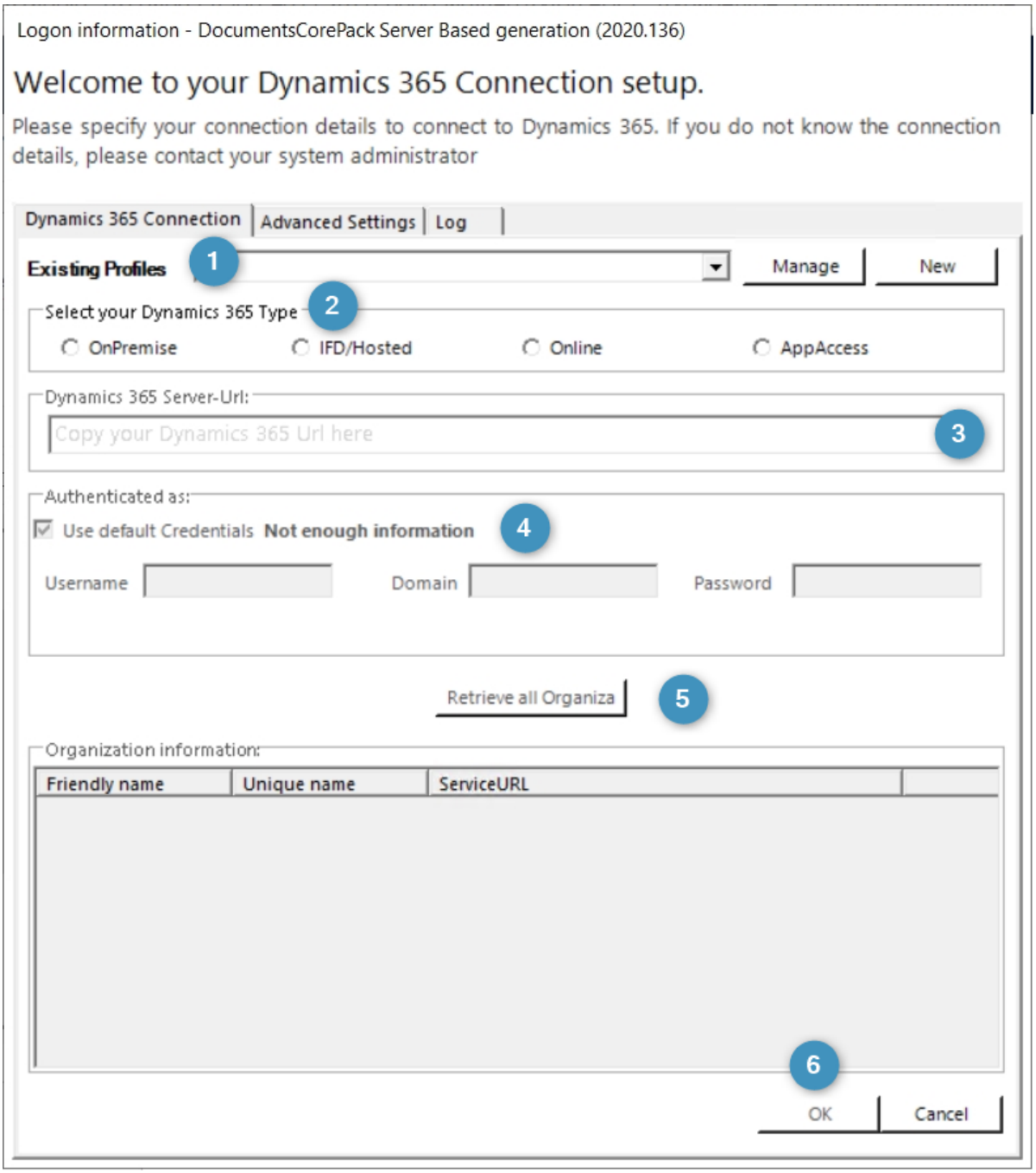


Figure 6: Dynamics 365 Connection setup

If an old DocumentsCorePack version is detected during installation, you will be prompted to uninstall.

2.7. Security Roles

General security roles for all products:
The following security role is required by all our products:

- MSCRM-Addons General Security Role

This security role contains the basic requirements for using the product itself and being able to perform the license-check.

Product-specific security roles:
The following security roles are required only by specific products. All users that should work with the products require both the MSCRM-Addons General Security Role and the product-specific security roles.

- **DocumentsCorePack**
  DocumentsCorePack Security Role

- **AutoMerge**
  MSCRM-ADDONS.com AutoMerge

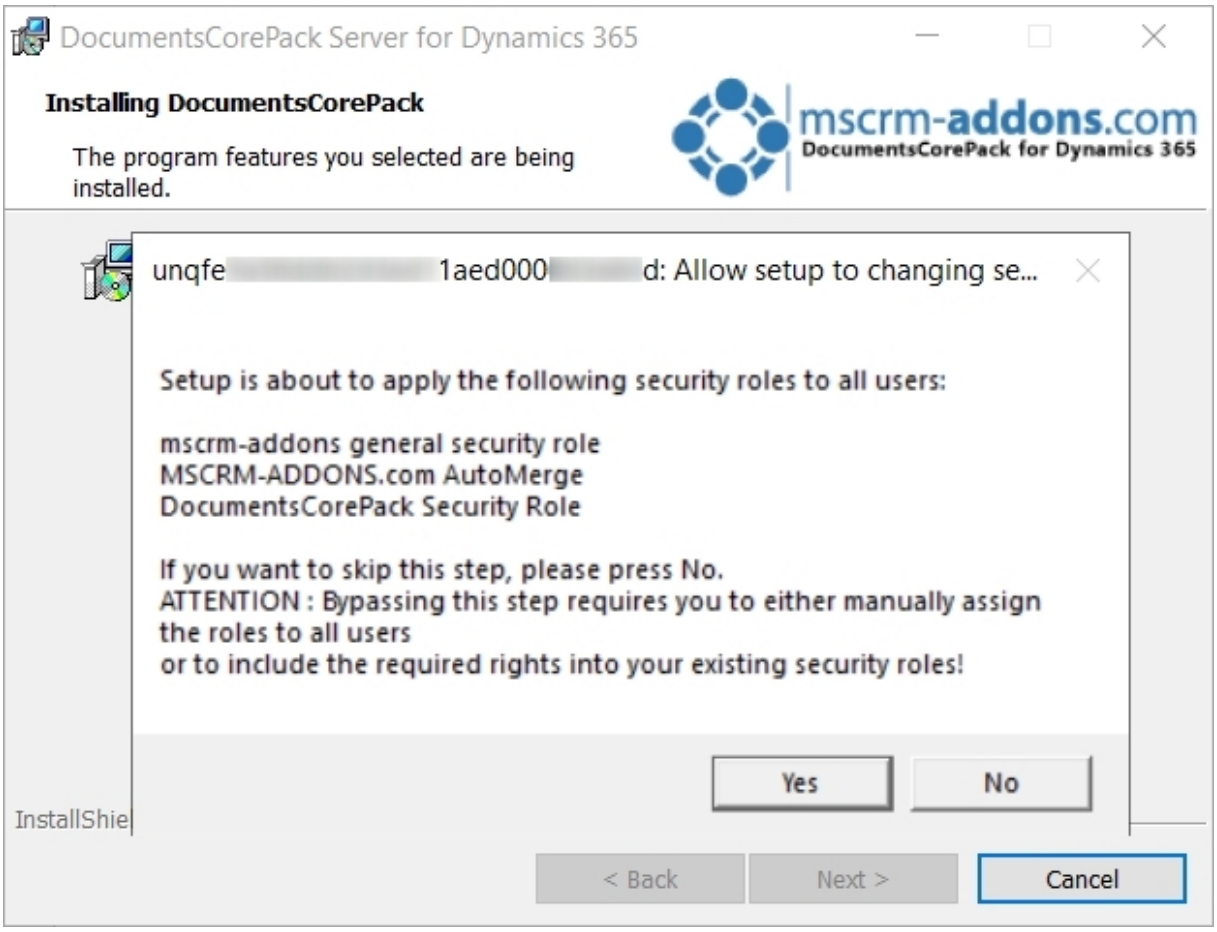


Figure 7: Security roles

Click ***[Yes]*** to allow the setup of changing these security roles. Click ***[No]*** to skip this step.

If you skip this step, you will be required to either manually assign the roles to all users or to include the required rights into your existing security roles.

If SharePoint is already configured in your Dynamics 365 system, the following window will appear. Confirm with **Yes** to allow the DocumentsCorePack Server setup to use SharePoint. Click **No** to skip this step.

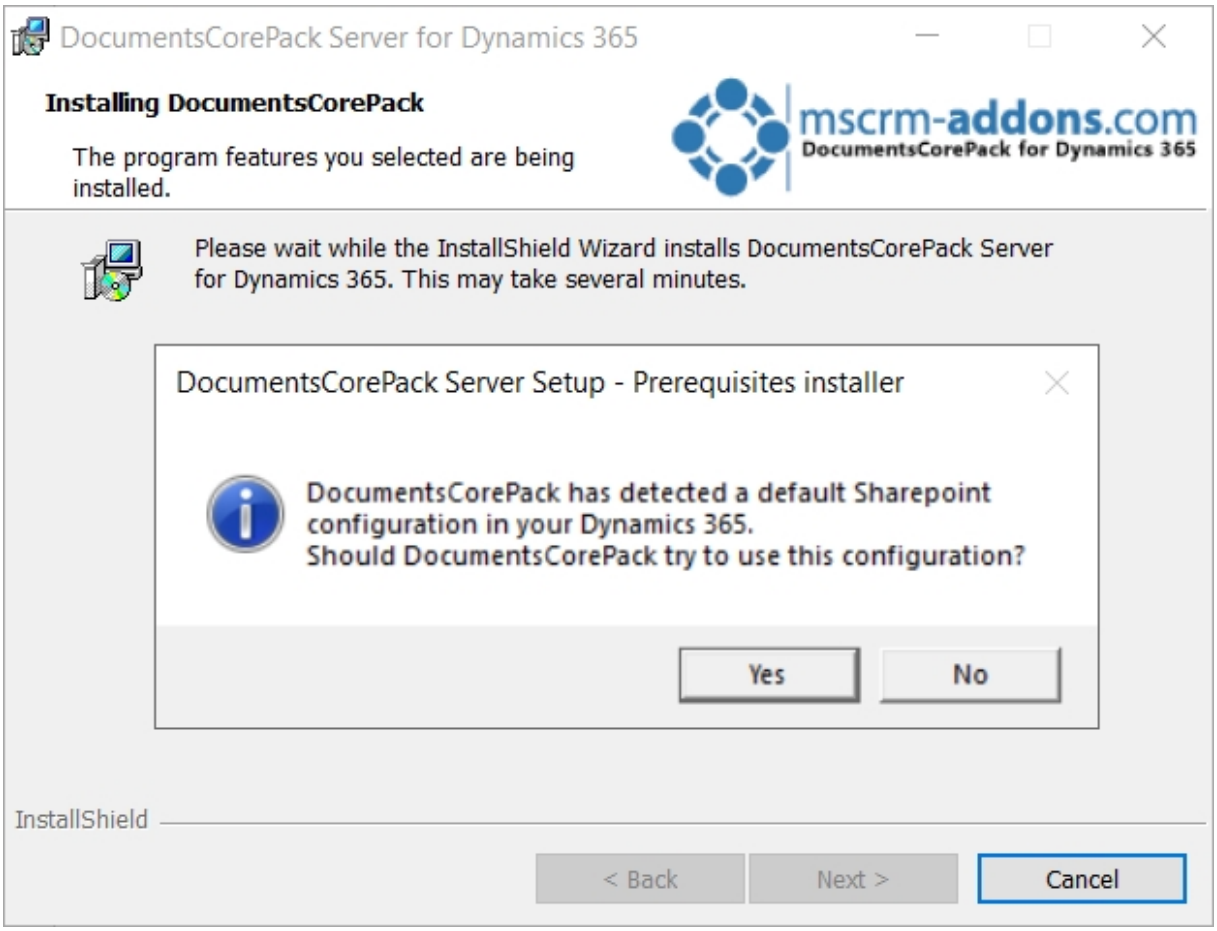


Figure 8: Default SharePoint configuration detected

2.8. Finish the installation

The DocumentsCorePack Server Configuration will start automatically for the organization you selected during the setup. Click **Finish** to continue.

If an obsolete product has been detected during the setup, you will be asked to delete these unnecessary product(s) to avoid confusion between the two products.

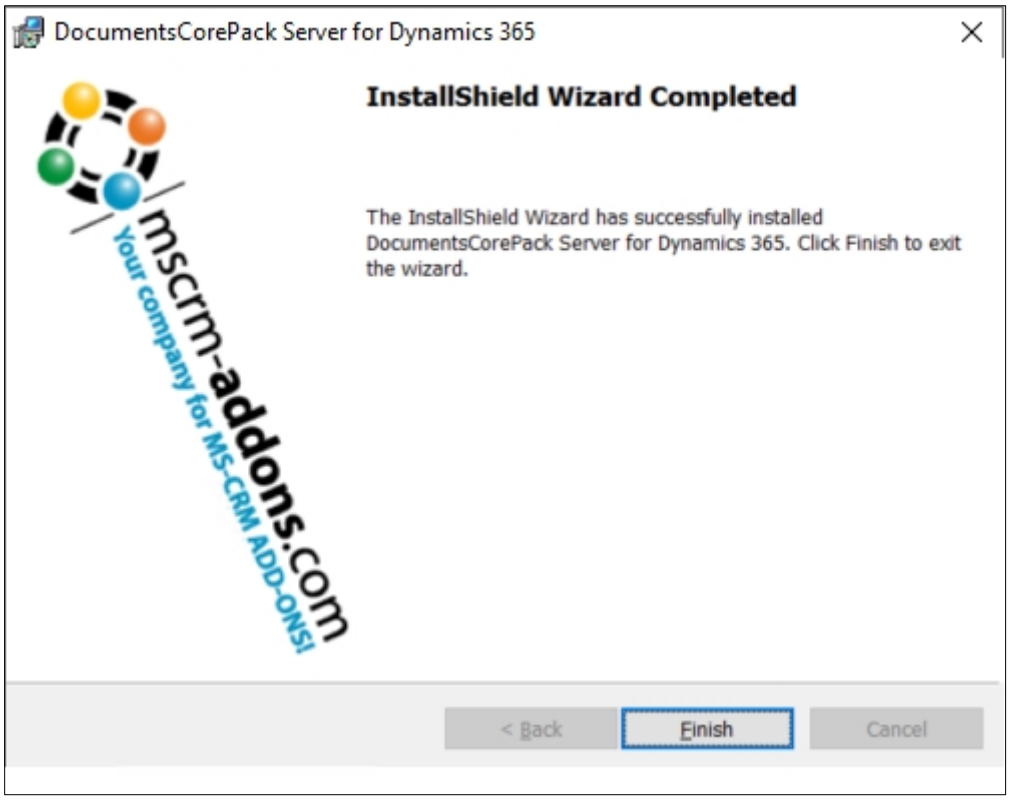


Figure 9: Finish installation

2.9. Organization overview

After finishing the configuration, the **Organization overview** window opens. With a click on the configuration, you have the option to edit the service.

To open the **Organization overview** again, after closing, search in the Windows Start pane **Configuration – DocumentsCorePack for Dynamics 365**.

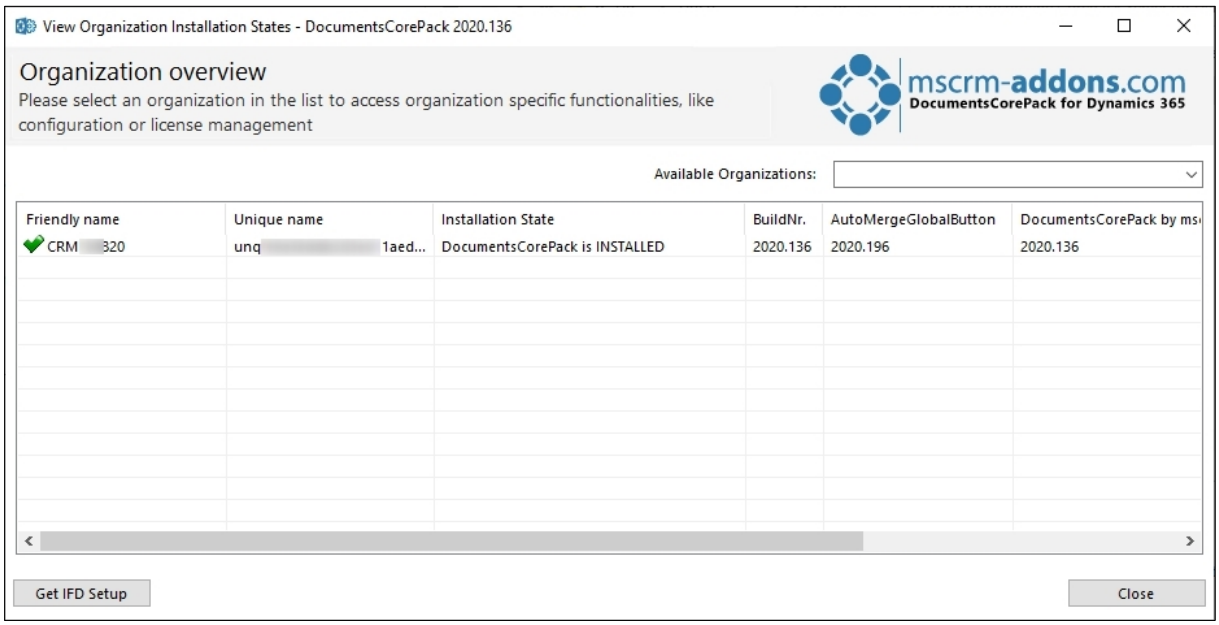


Figure 10: Organization overview

2.10. Organization overview – Function buttons

After choosing an organization in the Organization overview window, the several function buttons will appear at the bottom of the window.

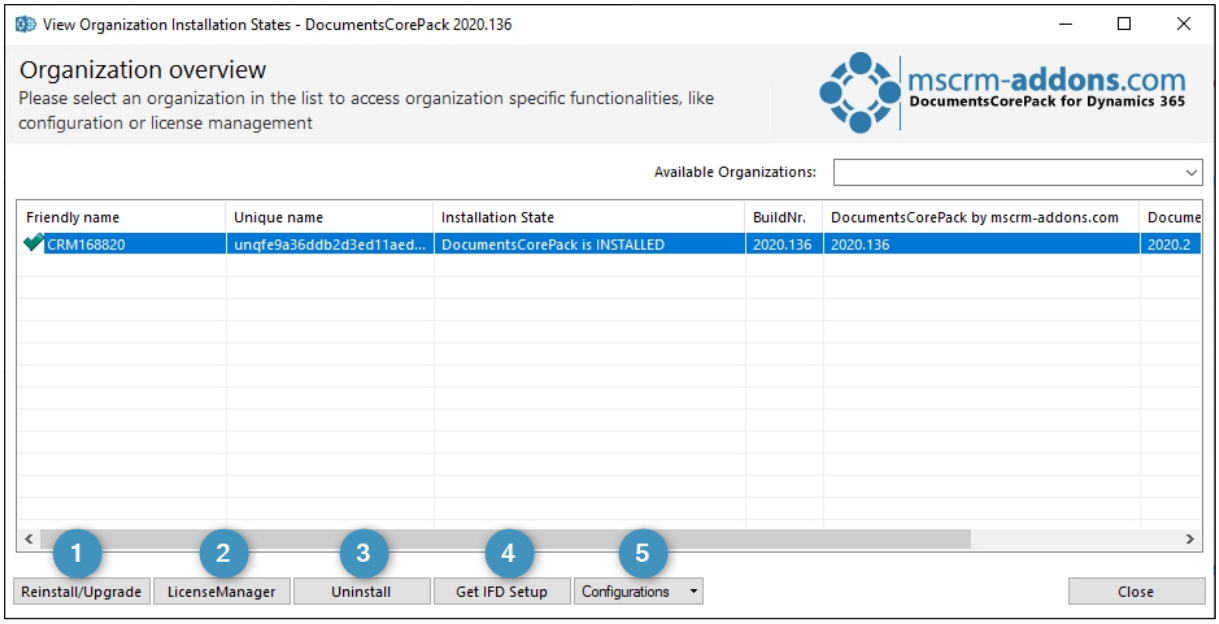


Figure 11: Organization over - function buttons

1 **Reinstall/Upgrade**: Upgrade your solution to the latest version.

2 **License Manager**: The License Manager provides you with an overview of all the **MSCRM-ADDONS products** you have installed. Selecting a product in this overview will bring up the according license details on the right side. A green check next to an add-on icon means that its license is valid. A cross symbolizes an invalid license. More information about the local License Manager can be found in the corresponding documentation (chapter 2.1 Local License Manager Overview).

3 **Uninstall:** With a click on this button, you have the option to uninstall DocumentsCorePack from the selected organization. Before it is uninstalled, you will be provided with the Uninstall window. Here, click on the **Yes** button to uninstall the service or click on the **No** button to cancel.

4 An **IFD setup** is only required when using FileExplorer or SharePoint Folder and Sites Integration. Therefore, you must install IFD before you can use it via this button.

5 **Configurations:** This button allows you to configure the 1 Client & Server Based generation settings and to set up the 2 Service Configuration in Dynamics 365-Online and print jobs.

2.11. Client & Server Based generation settings

Hit the **Launch** button to open the settings for **Client** and/or **Server Based Document Generation**. The window that opens provides you with a few tabs to help you configure your Client and Server Based Generation settings. Here, users can configure which entities the Server and/or Client Based button should appear for and rename the button label. (For example, configure which entities you want to see for the **Export** button).

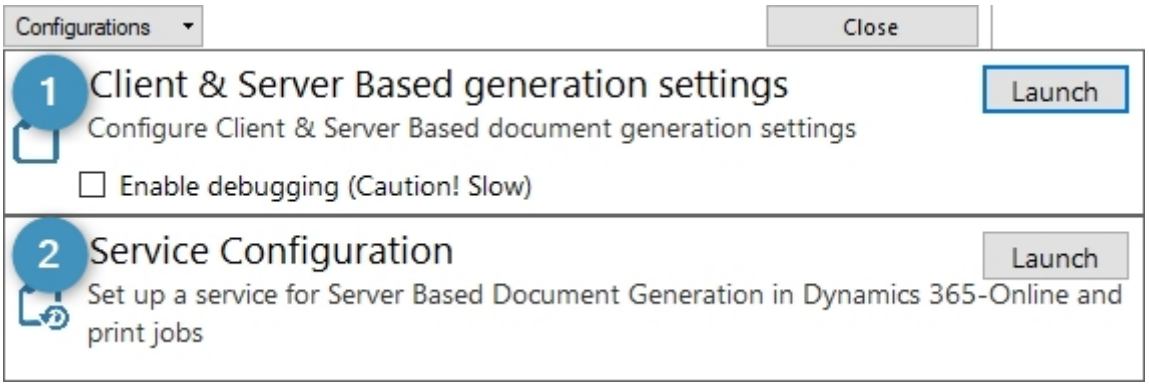


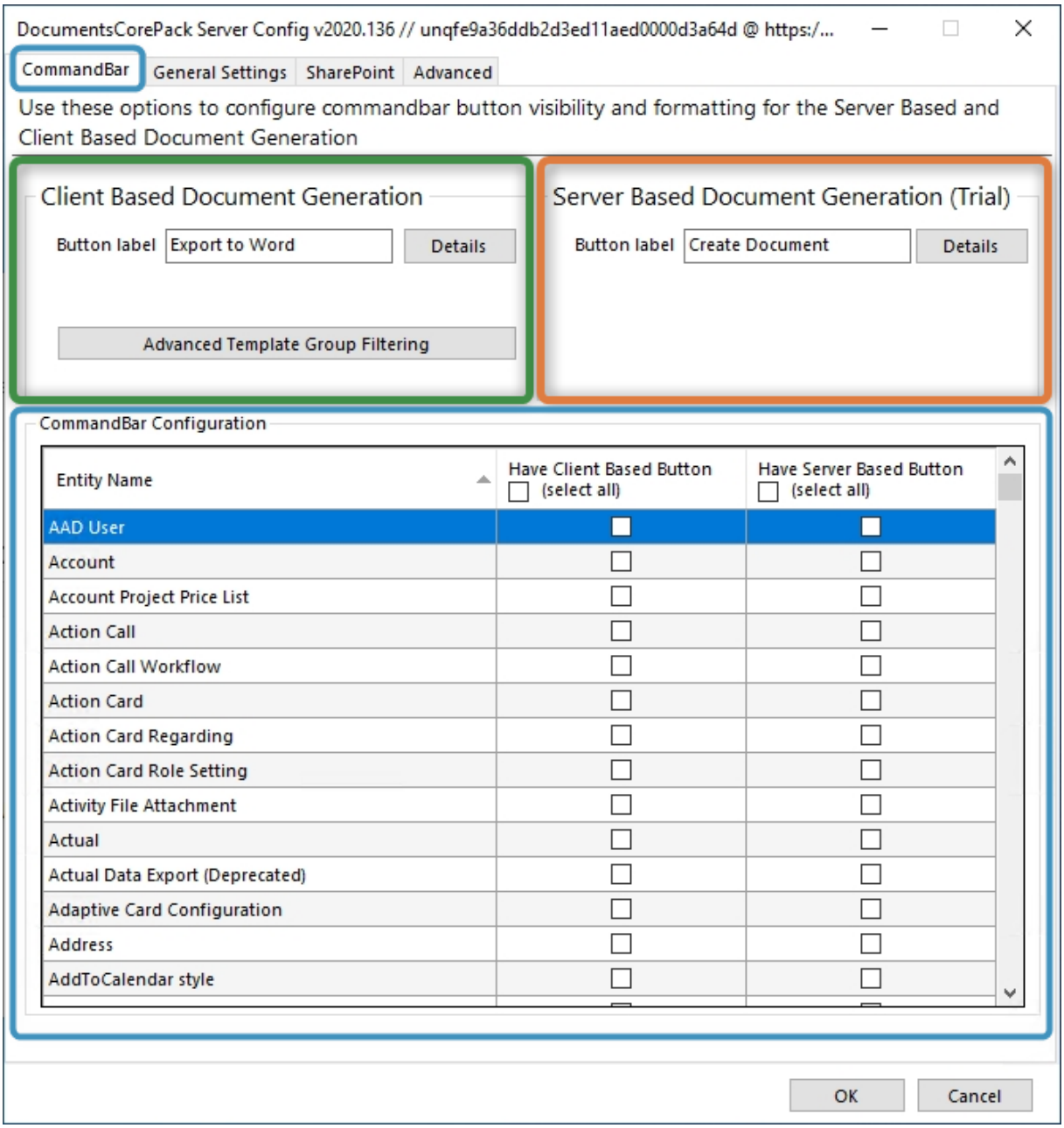
Figure 12: Configurations

1.12. The Command bar tab

The options in the **CommandBar** tab help you to configure the CommandBar button visibility and the formatting for the Server Based and Client Based Document Generation.

Here users can configure the entities where you want them to show, as well as display the name of these buttons:

- The **Export To Word** button for the Client Based Document Generation
- The **Create Document** button for the Server Based Document Generation



2.12.1. Client Based document generation

This section contains all settings for Client Based Document Generation. With a click on **Export to Word**, you can define a different name for the **Button label**.

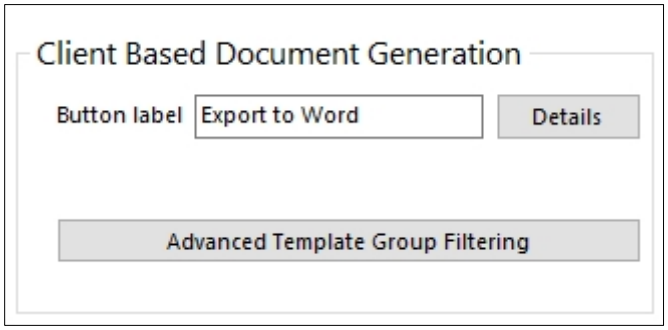


Figure 13: Client Based Document Generation

With a click on **Details**, the **Edit Ribbon & Navigationbar resources** window opens.

The editor allows you to modify the default ribbon and navigation bar icons and labels supplied by DocumentsCorePack server.

Image resources must be available as web resources in CRM to be able to use. Use the refresh button on each control to reload the list of available resources.

❶ **Icons**: The Icons tab of this configuration window gives you the possibility to change the icons of the buttons. The icons are Dynamics 365 web resources, which you can upload yourself with the standard Dynamics 365 functionality.

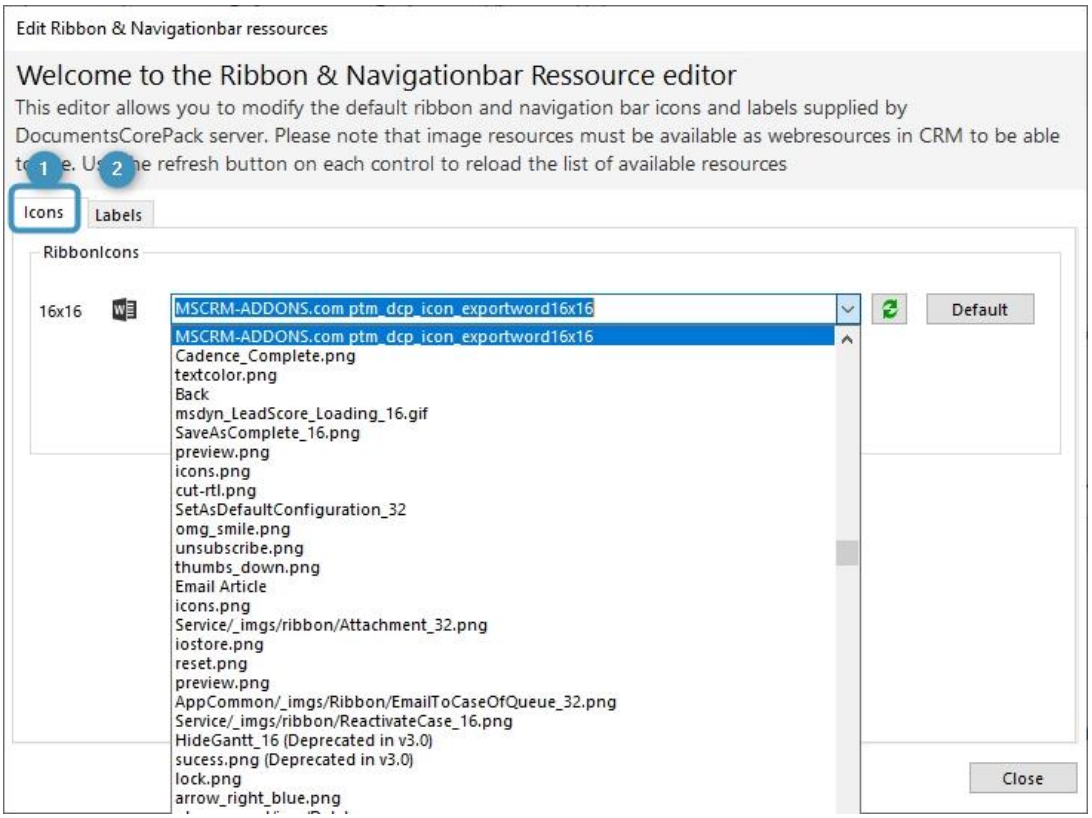


Figure 14: Ribbon and Navigation bar resources

2 **Labels**: Within this dialog you can set the different labels for the different locations (Grid, Form...) of the **Export to Word** button for different languages.

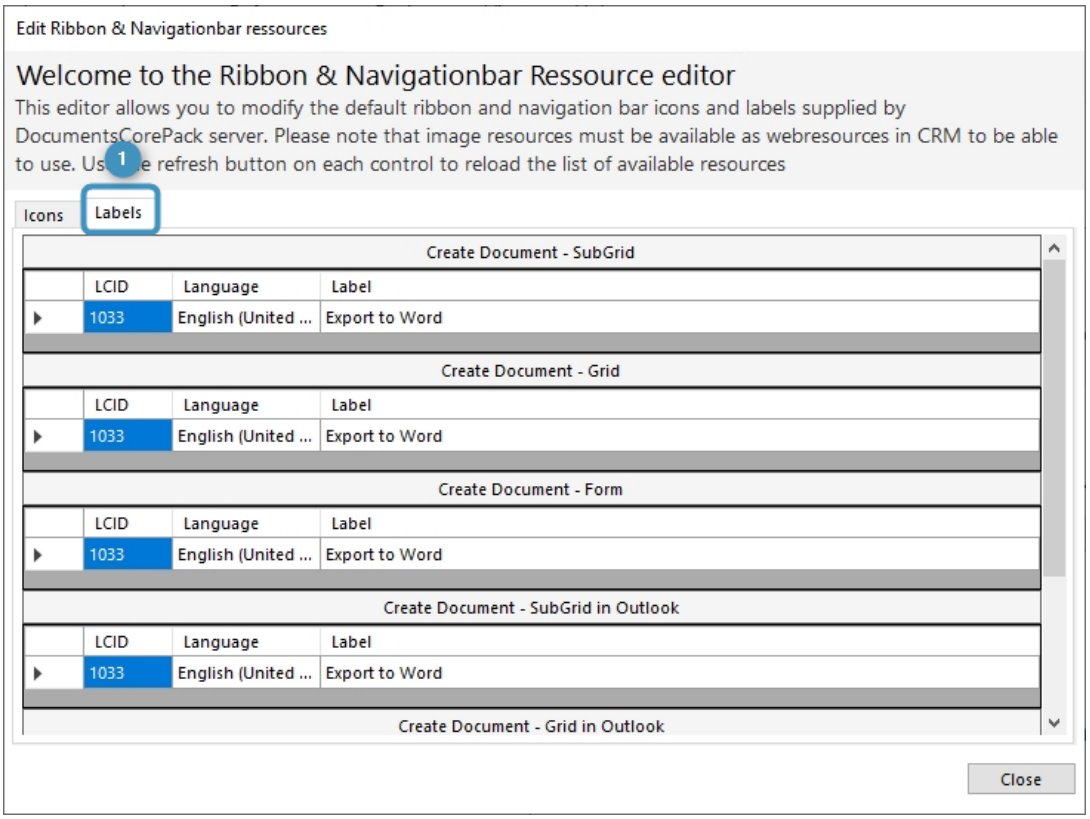


Figure 15: Labels tab

Advanced Template Group Filtering: This feature offers the option to set a filter for DocumentsCorePack templates.

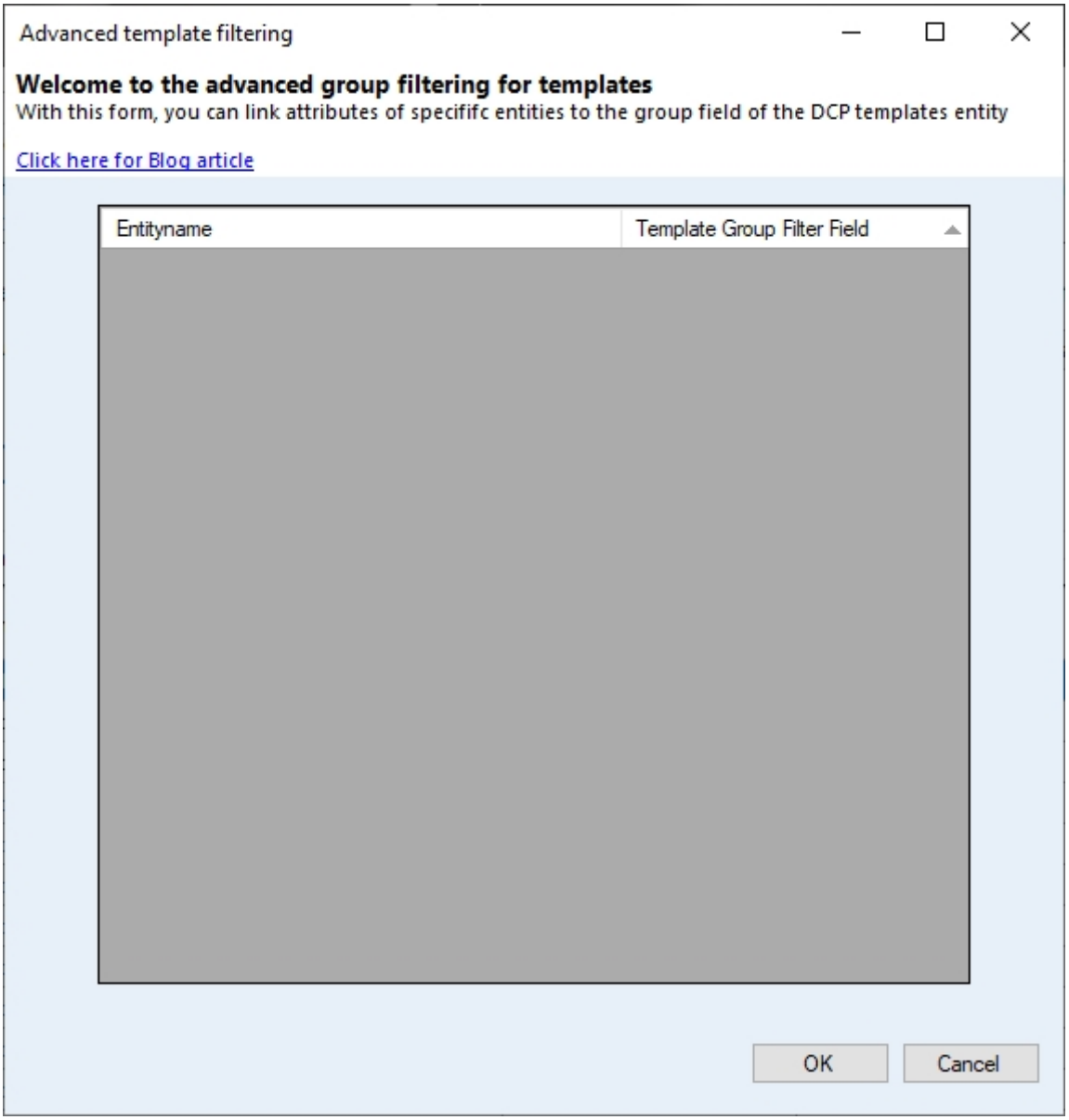


Figure 16: Advanced template filtering

While saving the changes, the following window will appear. Click **OK** to continue saving. **IMPORTANT**: DO NOT KILL the process when it freezes. This could cause inconsistent data in Dynamics 365. You have to wait until the configuration is finished. Click **Cancel** to save a later time.

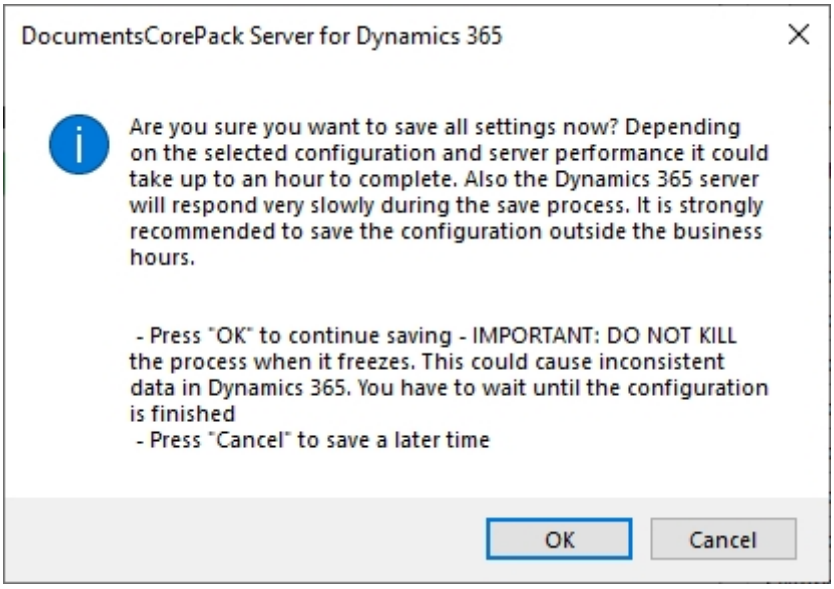


Figure 178: Save settings

2.12.2. Server Based document generation

Our custom dialog gives a quick start to server-based document generation. Users can directly start using the product after the installation without the need of designing a new process or dialog to see the product in action.

All our addons come with a 14-days trial license. If the trial license is expired, the window will look like in the screenshot shown above. Please contact our support team to get the permanent license for DocumentsCorePack Server and / or Client Based Document Generation & Processing should this occur.

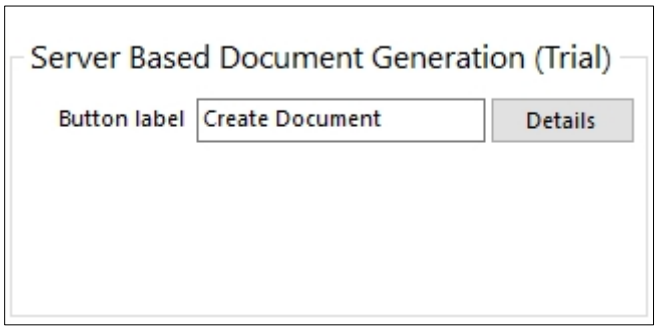


Figure 18: Server Based Document Generation (Trial)

2.12.3. Command bar Configuration

This part of the configuration allows users to select the entities where the Client Based and or Server Based Button should appear.

1 Activating the checkboxes will select the **Client Based Document** Generation Button **Export to Word** for the selected entity.
2 Activating the checkboxes will select the **Server Based Document** Generation Button **Create Document** for the selected entity.

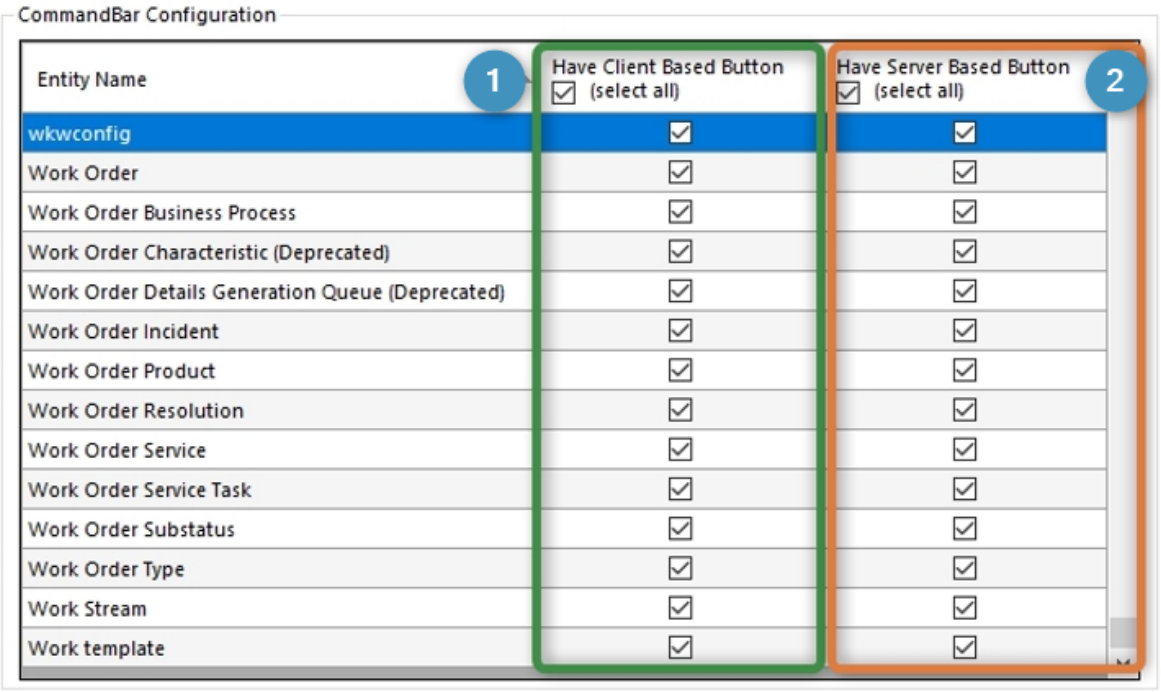


Figure 19: Command bar configuration

1.13. The General Setting tab

1 **Import/Export Templates**: For more information about the import/export of DCP templates, please have a look at chapter 6.2 Import/export existing DocumentsCorePack templates on page 45.

2 **Language**: You can choose the language from the dropdown-box. Languages are listed in language code (en for English, de for German). To add another language, please have a look at chapter 7 Language Settings for DocumentsCorePack on page 48.

❸ **Debug**: Please leave this option unchecked. It is used by our support for bug fixing.

❹ **Data Source**: Here you can select the type of data source. This contains cached information from Dynamics 365, which can be used with the DocumentsCorePack Client.

❺ **Names to Cut**: This functionality is depreciated.

❻ **Replace Special Characters**: Treats special exceptions or certain coding problems with Dynamics 365.

❼ **Additional Entities**: DocumentsCorePack only shows customizable entities by default. If you want to use other entities for DocumentsCorePack, you must define them here.

❽ **Entities don't show**: Entities that are registered here will be hidden and are not useable/visible within DocumentsCorePack.

❾ **Unavailable entities**: Entities which are not included in the metadata cache.

❿ **Folder Displayattribute**: Here you can define the attribute for each entity that should be used for the folder name (affects SharePoint AND File Explorer). You can ignore this setting if you don't save your documents in one of these locations. Per default the "name" attribute is used.

⓫ **Metadata Cache (Not Created):** Create your metadata and save it to a local location. This is the fasted way to download metadata to the client. **Please note:** once created, this functionality needs to be updated manually!

⓬ **Server Based Document Generation Settings**: With a click on this button, users will access the "AutoMerge Config" in DocumentsCorePack to set up a service for Server Based Document Generation in CRM-Online and print jobs. For detailed information, please read chapter 2.5 Service Configuration on page 23.

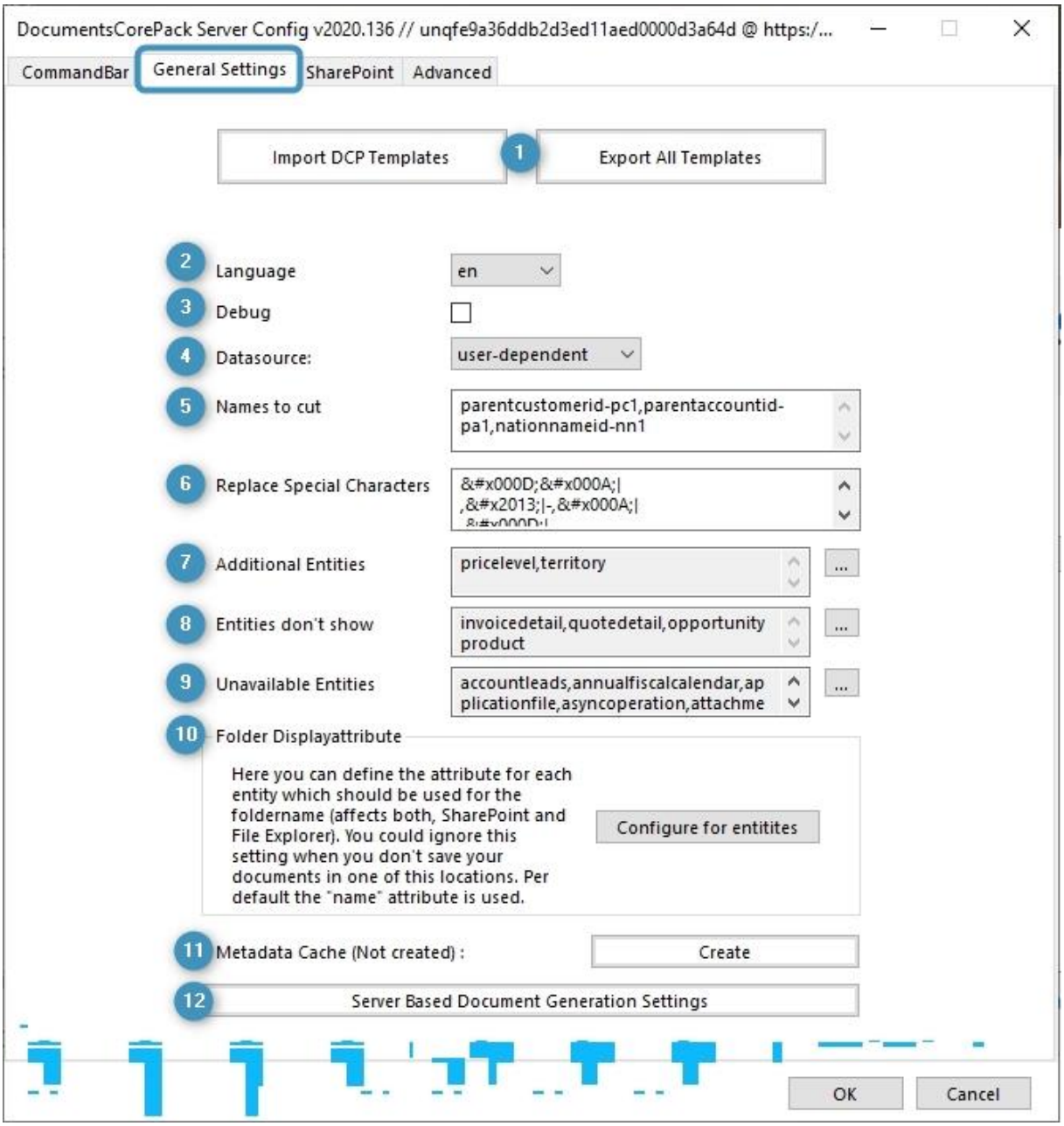


Figure 20: General Settings tab

1.14. The Sharepoint tab

Here, you have the option to define your SharePoint settings, if you want to save documents to SharePoint. The SharePoint Integration provided by DocumentsCorePack generates a separate folder in a site or a site for each record and gives you a structured and easy way to add files to your Dynamics 365 records.

Because Microsoft has introduced his own SharePoint Integration with MS CRM 2011, the SharePoint Integration provided by DocumentsCorePack is depreciated and will not be further developed but can be used by existing customers and in MS CRM 2015. The DocumentsCorePack Client supports both SharePoint Integrations

To use the SharePoint integration, you must configure it within Dynamics 365. When enabled, the documents generated via the DocumentsCorePack Client will be saved in the Dynamics 365 specified SharePoint location for each record.

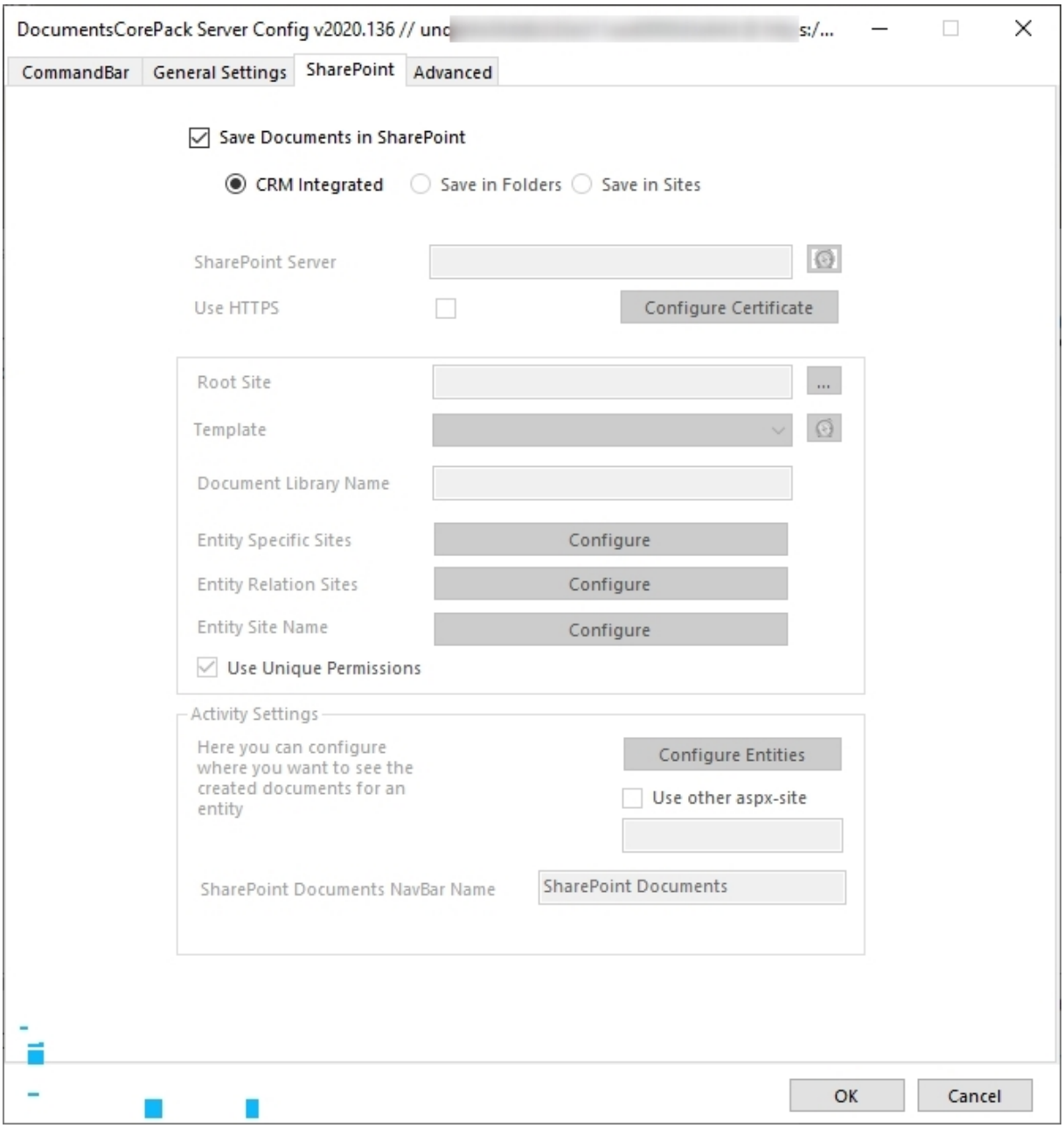


Figure 21: SharePoint tab

1.15. Service Configuration

To open the Service Configuration, please search for **"Configuration – DocumentsCorePack for Dynamics 365"** in the Windows start menu and run this application.

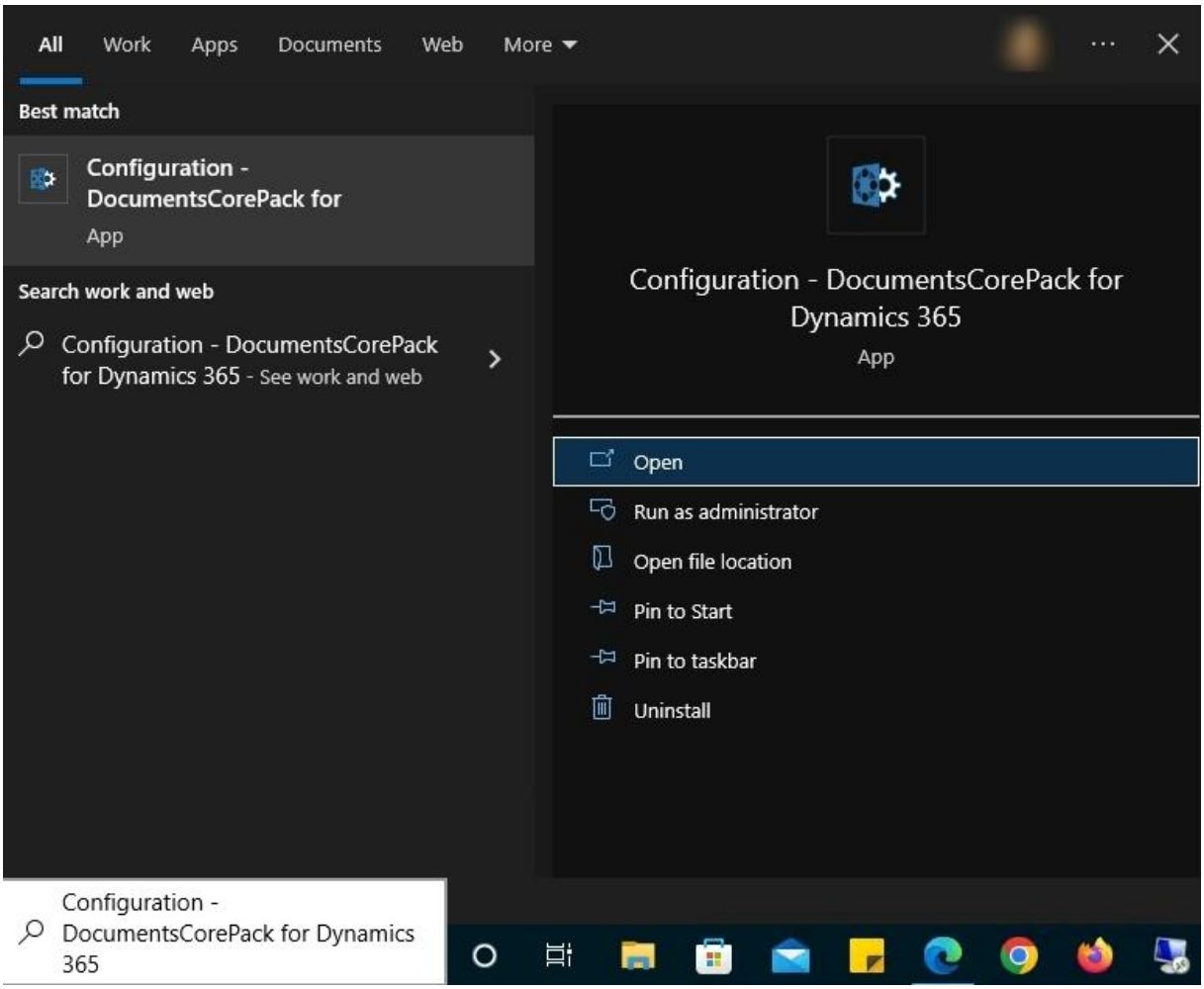


Figure 22: Look for DCP Configuration in task pane

2.15.1 The General tab

Within the **General** tab, define a name for your service and specify the logfile-path. You are also able to activate debugging if there is a problem with your service. Click on the **Save service configuration** button to continue.

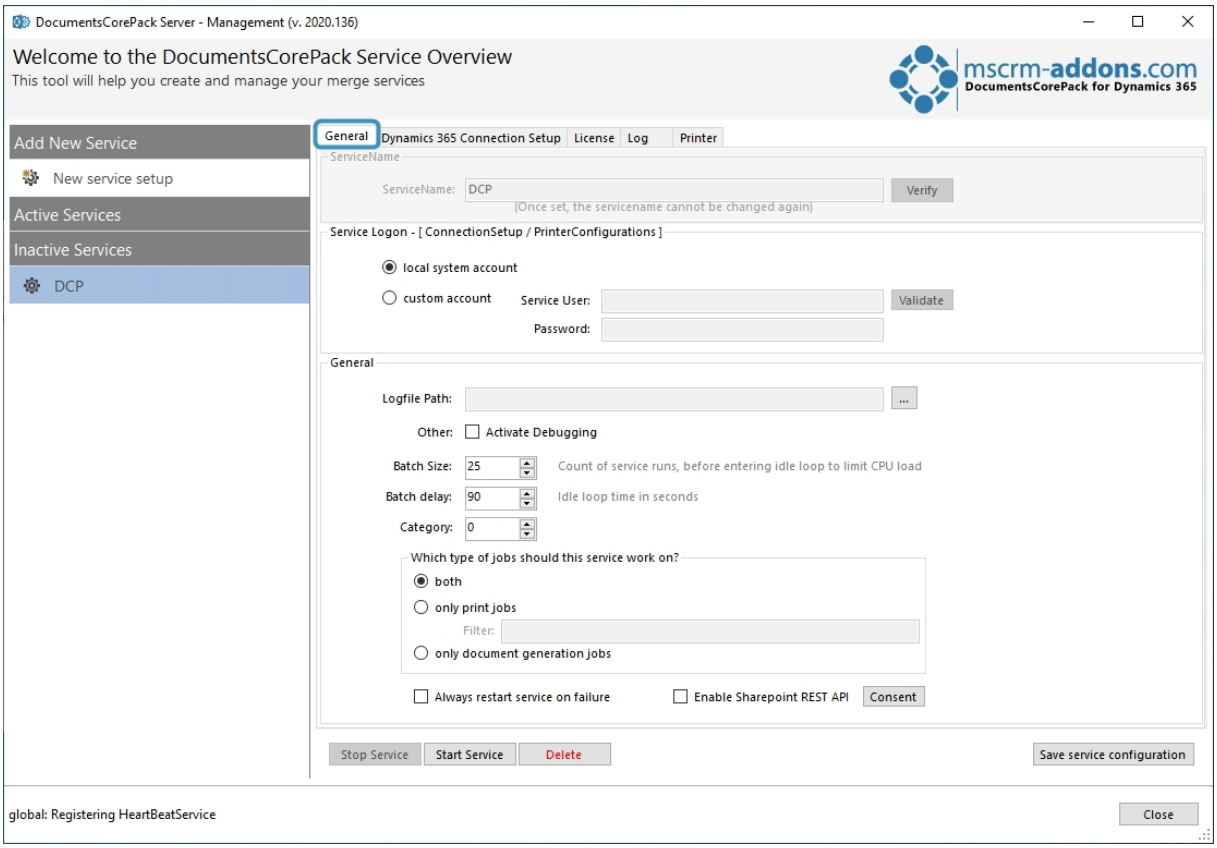


Figure 23: General tab

2.15.2. The Dynamics 365 Connection Setup tab

Again, you must specify your Dynamics 365 connection in the Dynamics 365 Connection Setup. Click on the **Save service configuration** to continue.

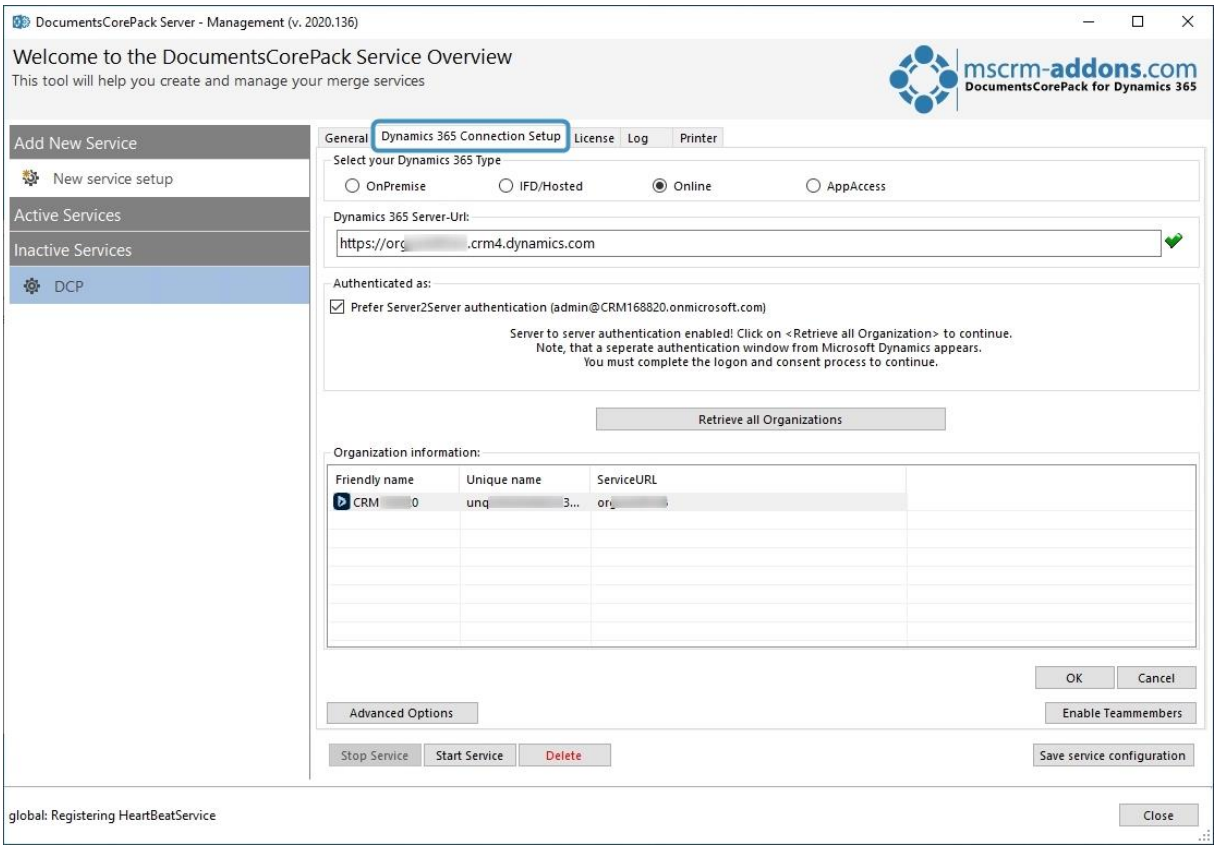


Figure 24: Dynamics 365 Connection Setup

2.15.3. The License tab

In the License tab, you can view the information about your license. In the example below, the license is valid.

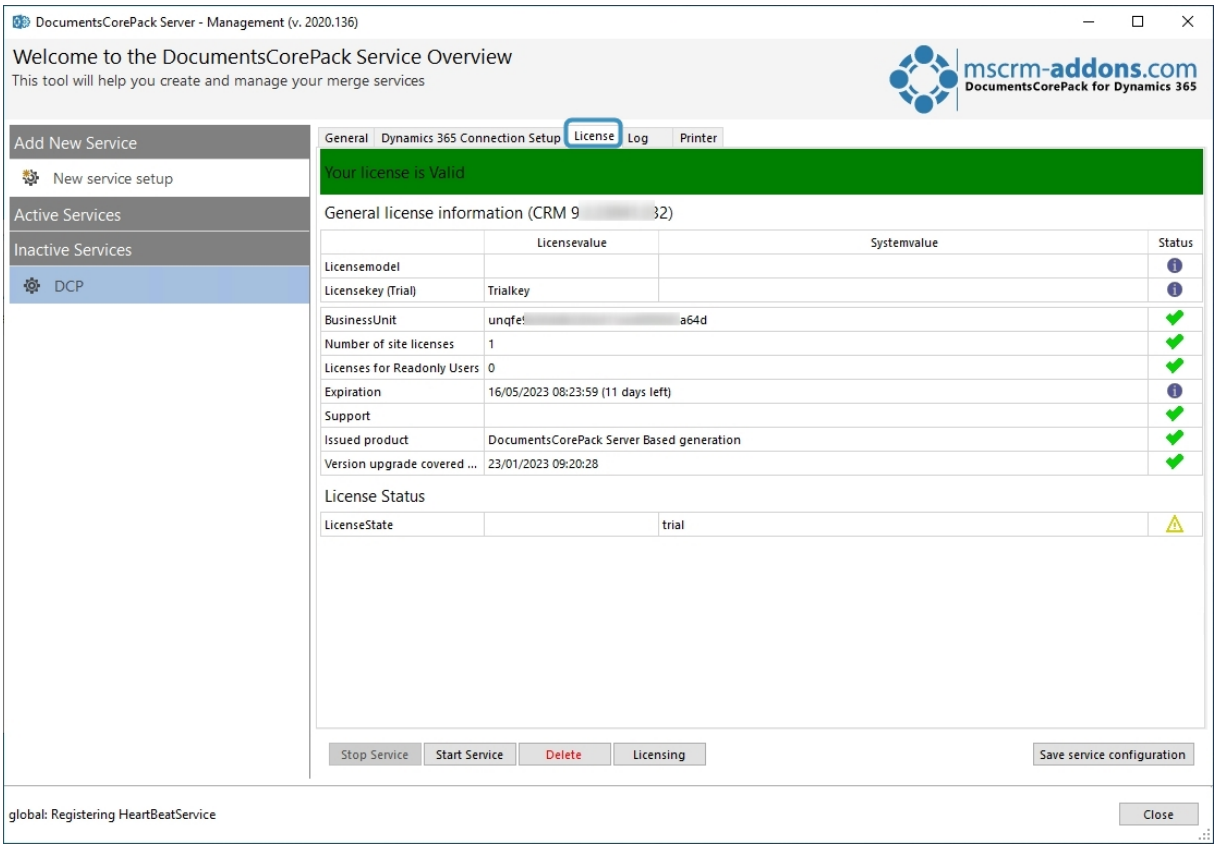


Figure 25: The license tab

2.15.4. The Log tab

See here the latest events and changes.

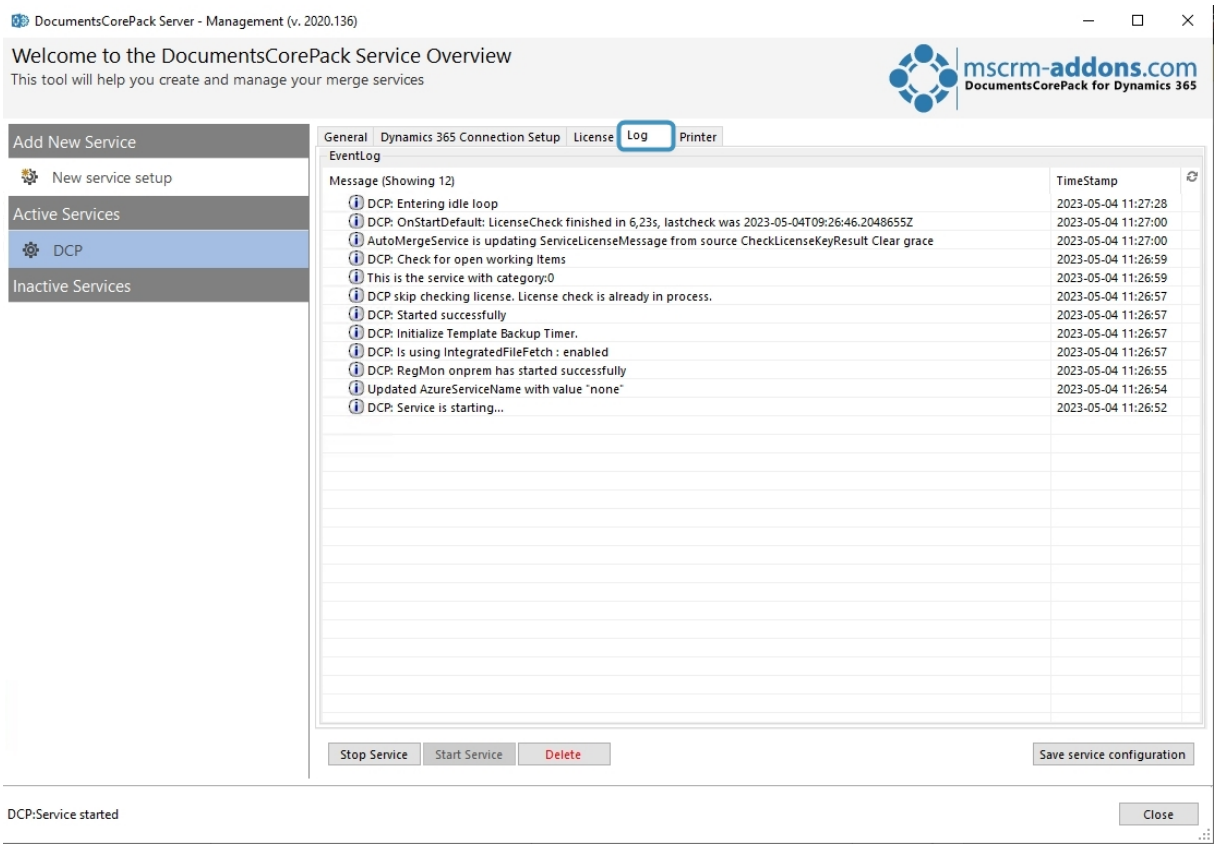


Figure 26: The log tab

2.15.5. The Printer tab

DocumentsCorePack now offers a service-based printing option, which is available in addition to the already known plugin-based printing option. The additional option is available within DocumentsCorePack for MS Dynamics CRM 2013 v5.30 and higher and is based on a service that runs in the background. Learn more.

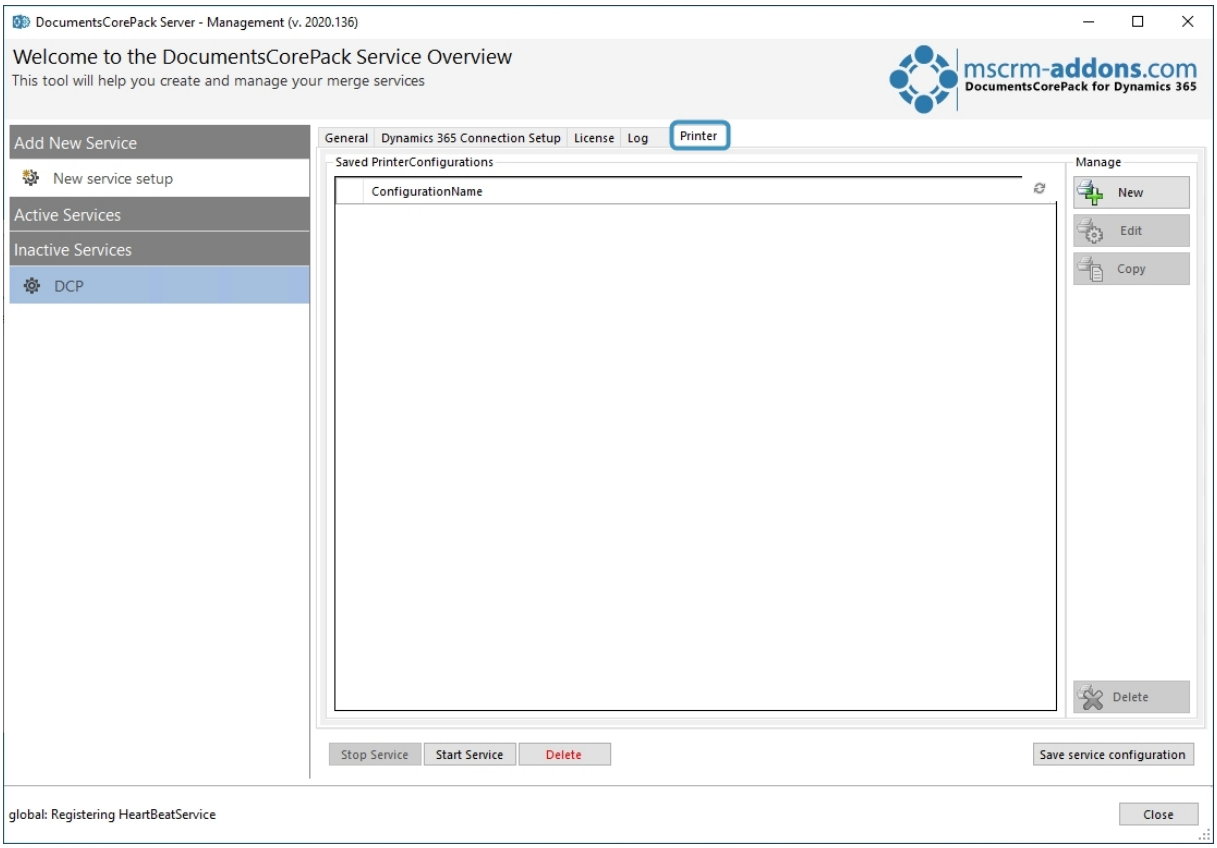


Figure 27: Printer tab

1.16. Licensing

Learn in this guide all about licensing for Microsoft Dynamics 365.

1.17. Upgrade

To upgrade your DocumentsCorePack version, simply re-run the setup (find the newest version here).

The final step of the upgrade is to execute the DocumentsCorePack Configuration as shown in chapter 2.11. Client & Server Based generation settings. The configuration is necessary to upgrade DocumentsCorePack properly!

3. How to install DocumentsCorePack in an IFD/Claims-based environment

In this chapter we will walk you through the required steps to install DocumentsCorePack in an IFD/Claims-based environment.

You need to have the following downloads present to successfully setup the addon:

- IFD-Tool (Download Link). You need to login on our web site.
- For installing DocumentsCorePack you need at least version 5.18 from our Download Section

Before you start installing, Dynamics 365 is required to be working correctly in IFD/Claims-Mode, including your ADFS, which should be installed correctly and configured to work with Dynamics 365.

More details on how to configure MSCRM for IFD/Claims can be found in the Microsoft Guide "Configuring Claims-based Authentication for Microsoft Dynamics CRM 2011" Download.

The following system configuration is the basis for our guide. Your setup will differ from these URLs, so make sure you are replacing the URLs with your own when following the guide.

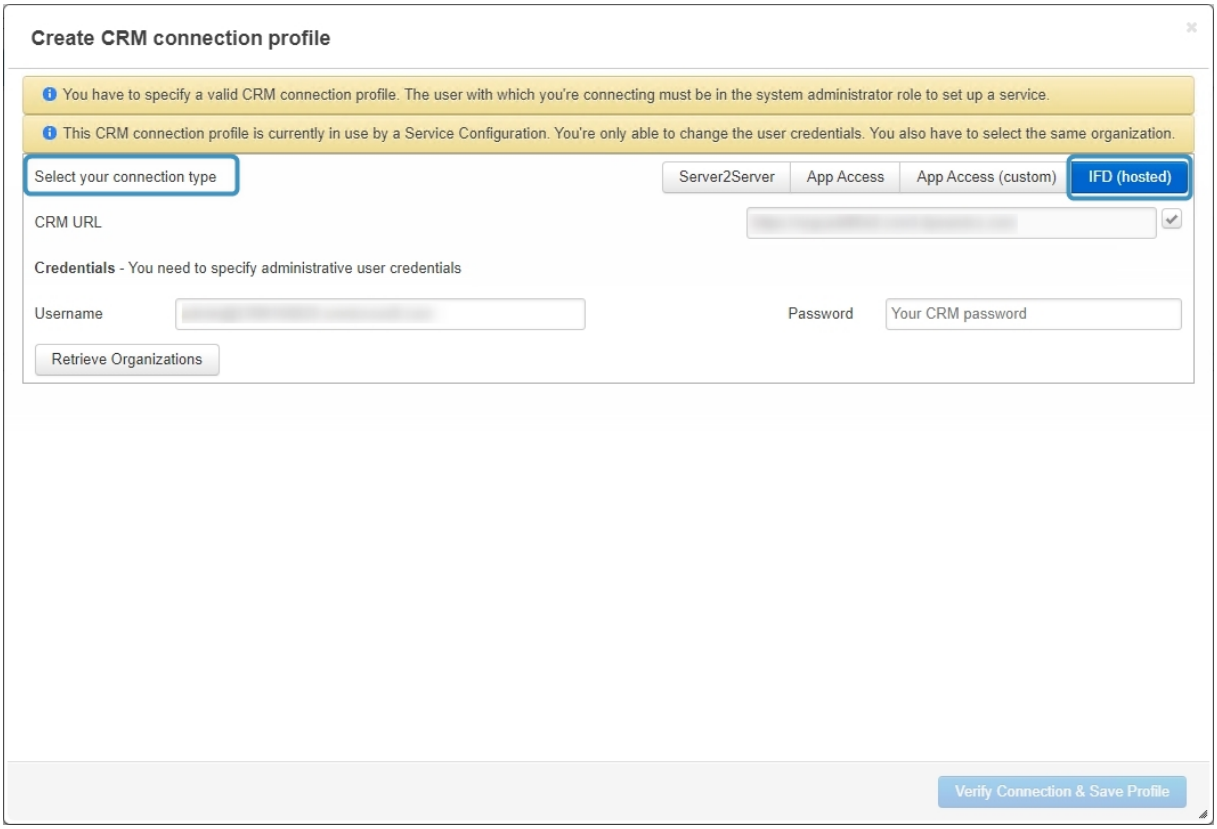
- Internal URL used to access Microsoft Dynamics CRM: **https://internalcrm.rc1ifd.ptm-edv.at**
- External URL used to access Microsoft Dynamics CRM: **https://[orgname].rc1ifd.ptm-edv.**at
- AD FS Server: https://win2008domain.ptm-edv.at
- The Addon itself also requires a DNS name: **https://documentscorepackserver.rc1ifd.ptm-edv.at**

A step-by-step description for a Basic installation/configuration of our addon

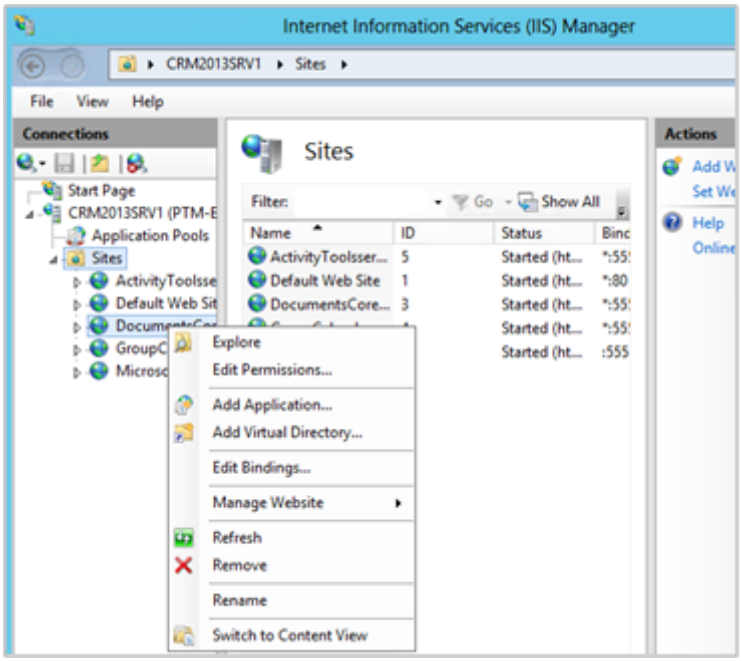
Please note: There is no IFD Configuration required for DocumentsCorePack for MS CRM 2015 Installation.

Step 1: Install the addon on the Dynamics 365 Server.

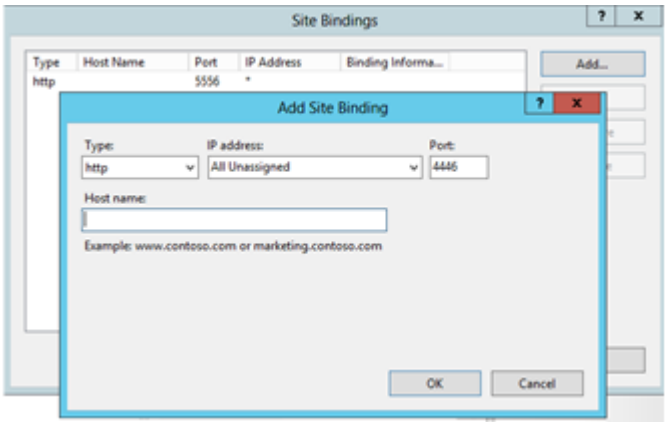
Step 2: You will be asked for the login information. Fill in the internal IFD name of your Dynamics 365. In our case it is **internalcrm.rc1ifd.ptm-edv.at**. Select the organization on which you want to install the addon and click **OK**.



Step 3: After the installation is finished, you must open the IIS (inetmgr.exe) and go to Sites → the Addon Website. Right click the DocumentsCorePackserver - WebSite and select **Edit Bindings...**.



Step 4: On the bindings click on **Add...** and select **https** in the **Add Site Binding**. You also must specify the port. In our example we use 4446. Now the web site is available for https. Click on the **OK** button.

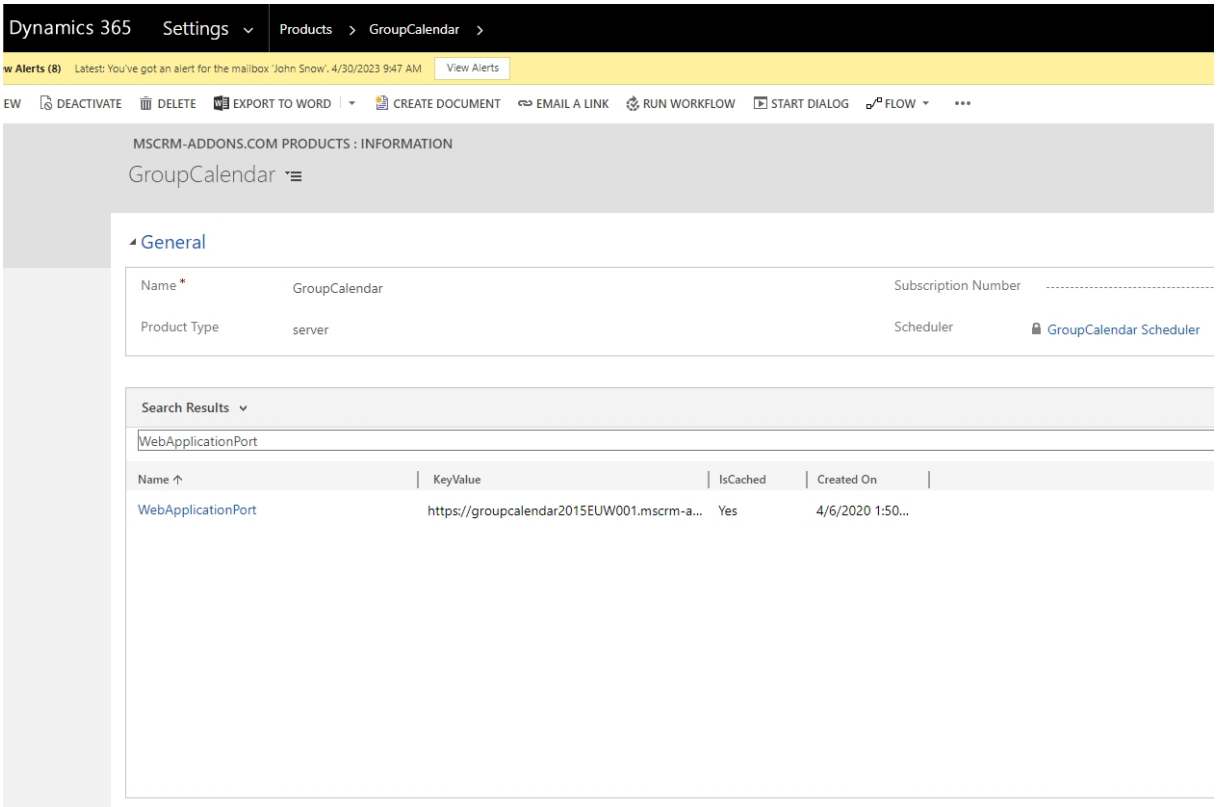


Step 5: Reselect the addon website and double click on the "Authentication" item in the details pane on the right-side. Verify that the "Anonymous" and "ASP.Net Impersonation" settings are enabled.

Step 6: The addon URL needs to be added to your DNS Server. Your DNS-servers must resolve the **documentscorepackserver.[your-domain]** names correctly. That means that they should resolve it with the same IP address as your Dynamics 365 Server. If you have an external DNS, make sure that both the external and the internal DNS can resolve the URL.

Step 7: Extract the IFD-Tool (zip-file) that you downloaded before and execute the **IFDSetupWizard.exe**. Follow the steps in the IFD Setup carefully.

Step 8: Open your Dynamics 365 and go to "Settings" and then "MSCRMADDONS.com Products". Open the addon in the MSCRM-ADDONS.com products section, and then select the MSCRM-ADDONS.com Settingskeys and search for the "WebApplicationPort" entry.



Step 9: Open the **WebApplicationPort** and replace the existing KeyValue with the following: **[httpsPort]|[httpPort]|[claimsbased]|[addonname]|[debugging]**

Example: **4446|5557|true|activitytoolsserver|false**

We have finished the configuration of the Dynamics 365 part and now need to configure the **AD FS**.

Step 10: Please log onto your AD FS Server and start AD FS 2.0 Management.

Step 11: On the action menu located in the right column, click **Add Relying Party Trust**.

Step 12: In the **Add Relying Party Trust** wizard, click **Start**.

Step 13: On the **Select Data Source** page, click **Import data about the relying part published online or on a local network** and then type in the URL to locate the **federationmetadata.xml** file.

This federation metadata is created with the IFD tool on the Dynamics 365 server. Example:
https://activitytoolsserver.rc1ifd.ptmedv.at:4446/FederationMetadata/200706/FederationMetadata.xml

Step 14: Type this URL in your browser and verify that no certificate-related warnings appear and click **Next**.

Step 15: On the **Specify Display Name** page, type in a display name, such as **DocumentsCorePack IFD**, and click on **Next**.

Step 16: On the **Choose Issuance Authorization Rules** page, leave the **Permit all users to access this relying party** option selected and then click **Next**.

Step 17: On the **Ready to Add Trust** page, click **Next** and then **Close**.

Step 18: If the **Rules Editor** appears, click on **Add Rule**. Otherwise, in the **Relying Party Trusts** list, right-click the relying party object that you created, click **Edit Claims Rules** and then click **Add Rule**.

Important: Be sure that the **Issuance Transform Rules** tab is selected.

Step 19: In the **Claim rule template** list, select the **Pass Through or Filter an Incoming Claim** template, and then click **Next**.

Step 20: Create the following rule:

- **Claim rule name**: Pass Through UPN (or something descriptive)
- Add the following mapping:
    - Incoming claim type: UPN
    - Pass through all claim values

Step 21: Click **Finish**.

Step 22: In the **Rules Editor**, click **Add Rule**.

Step 23: In the **Claim rule template** list, select the **Transform an Incoming Claim** template and then click **Next**.

Step 24: Create the following rule:

- Claim rule name: Transform Windows Account Name to Name (or something descriptive)
- Add the following mapping:
  - Incoming claim type: Windows account name
  - Outgoing claim type: Name
  - Pass through all claim values

Step 25: Click **Finish** and when you have created all three rules, click on **OK** to close the **Rules Editor**.

You have now finished the configuration and you should be able to use the addon in your IFD/Claims environment now.

4. Troubleshooting

If you see the following error message, there may be two reasons for this:

Reason 1: You may be using a wrong certificate for the AD FS signing. Make sure the thumbprint in the web.config matches the one of the token signing certificate in AD FS.

```
<issuerNameRegistry
type="Microsoft.IdentityModel.Tokens.ConfigurationBasedIssuerNameRegistry,
Microsoft.IdentityModel, Version=3.5.0.0, Culture=neutral,
PublicKeyToken=31bf3856ad364e35">
        <trustedIssuers>
        <add thumbprint="37a59abae1a394ffd8f0fd750c2e38e98069e349"
name="http://win2008domain.ptm-edv.at/adfs/services/trust" />
</trustedIssuers>
</issuerNameRegistry>
```

Reason 2: This error could also indicate access rights problems with the certificates private key (mainly an issue for self-signed certificates).

Open your certificate store on the server (MMC, add certificate snap-in for local computer) and find your HTTPS certificate. In the context menu, under all tasks, select the **manage private keys** option and grant access to everyone.

Checklist for general troubleshooting:

- Is the Setting WebApplicationPort still intact?
- Are there not any http/https bindings in Dynamics 365?
- Are there not any http/https bindings in the product's website?
- Is the DNS correctly resolving the products link?
- Has the ConnectionProfile been created with IFD as the connection type?

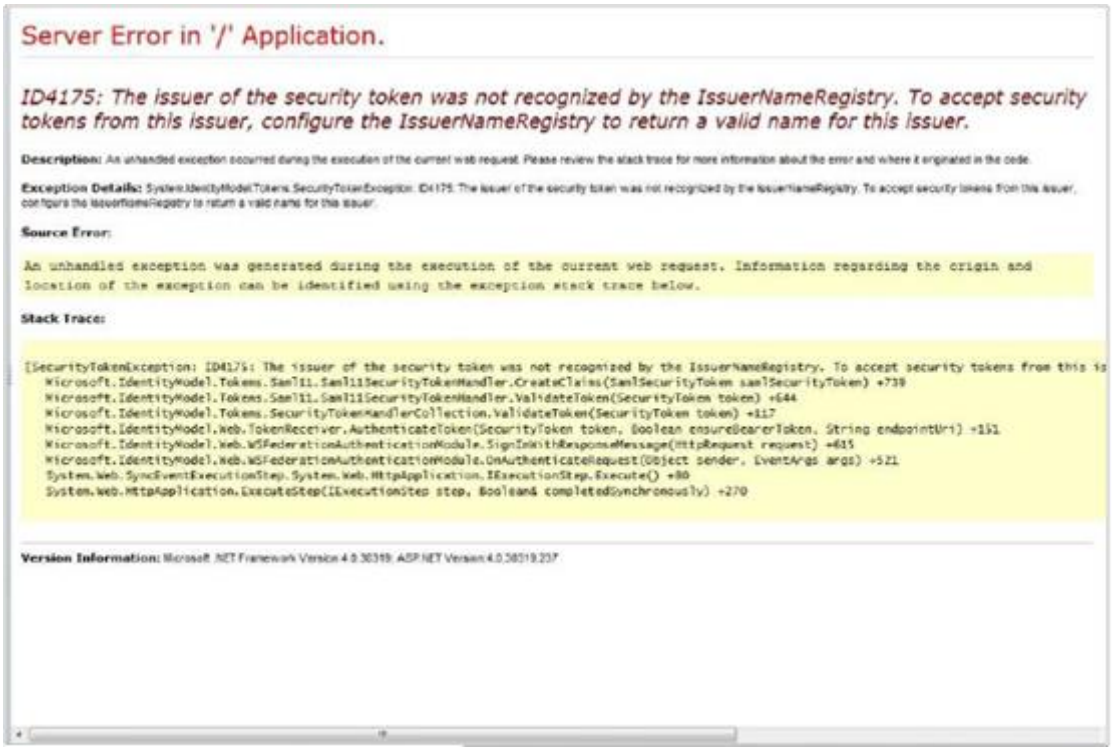


Figure 28: Server Error - message

5. Windows 12 WIF Framework installation (WindowsIdentityFoundation)

Windows Identity Foundation is included with the operating system (Windows Server 2012 R2, Windows Server 2012 and Windows 8.1) as a feature in turning Windows features on or off.

If you didn't previously install WIF, then you should follow these steps:

Step 1: Start by running the **Server Manager**, if it is not already open, by either of these two options:

Step 2: On the Windows taskbar, click the Server Manager button.
Step 3: On the Start screen, click the Server Manager button.

Step 4: Under the Manage menu, select Add Roles and Features (or press Add roles and features under the Dashboard panel).

Step 5: On the Before You Begin screen, click **Next**.

Step 6: On the Installation Type screen, select Role-based or Feature-based Installation and click **Next**.

Step 7: On the Server Selection screen, select the appropriate server, leave the default options, and click **Next**.

Step 8: On the Server Roles screen, click Next.

Step 9: On the Features screen, select **Windows Identity Foundation 3.5** and click **Next**.

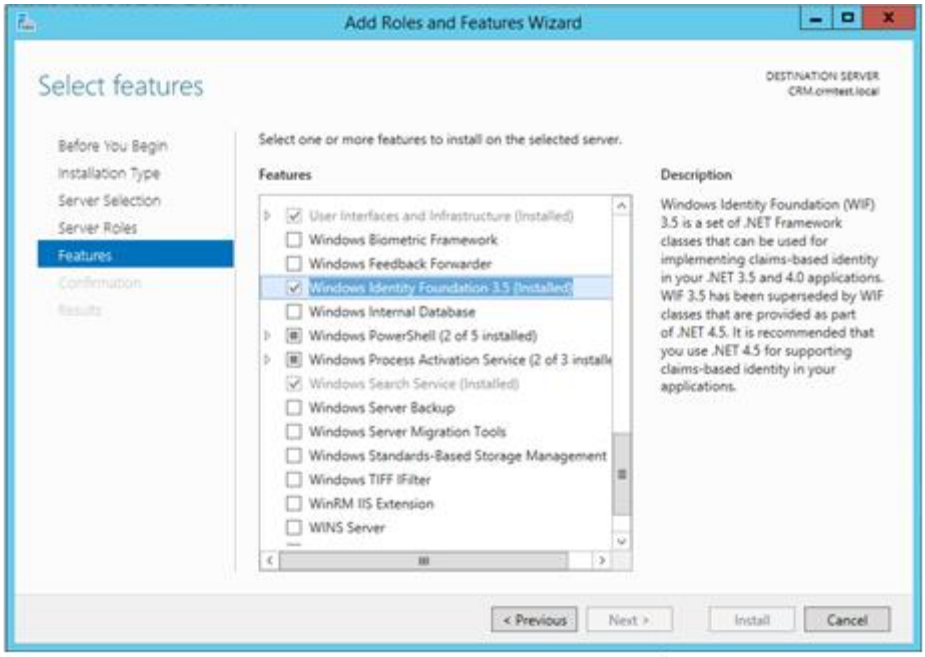


Figure 29: Windows features - WindowsIdentifyFoundation 3.5

Step 10: On the confirmation screen, select **Restart the destination server automatically if required** and click **Install**:

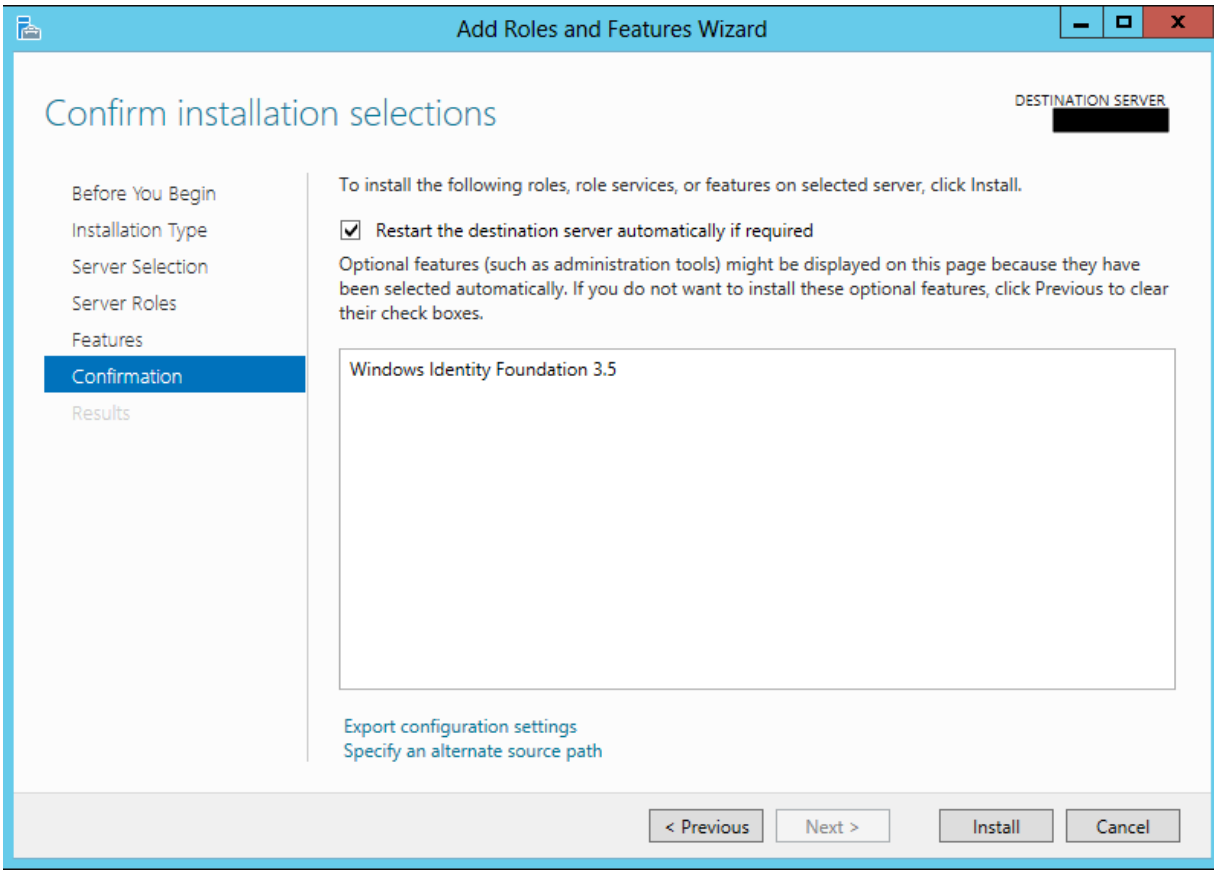


Figure 30: Confirm installation selection

Step 11: When the installation is completed, the wizard reflects the installation status on the Results screen

Step 12: Click **Close** to exit the wizard.

6. DocumentsCorePack Templates

DocumentsCorePack templates are predefined Word templates that have some DocumentsCorePack merge fields in it. You can define several templates for each Microsoft Dynamics 365 entity (For example: account, contact, etc.).

Example: You created an "Account reconnect" template that should be used to send information to accounts. Once created and stored, every Microsoft Dynamics 365 user can generate "Account reconnect" letters based on this template.

Please note: Some basic templates like "Account Reconnect", "Gift Certificate" for contacts, and "quote" templates come with the installation of DocumentsCorePack.

6.1. How to create DocumentsCorePack templates

Please read the corresponding User Guide (chapter 5.1 How to create DocumentsCorePack templates) for more information about the creation of DocumentsCorePack templates.

6.2. Import/export existing DocumentsCorePack templates

Open your DocumentsCorePack Server Configuration and choose the organization for which you want to import/export the Templates and click on the **OK** button.

To open the **Organization overview** again, after closing, search in the Windows Start pane **Configuration – DocumentsCorePack for Dynamics 365**.

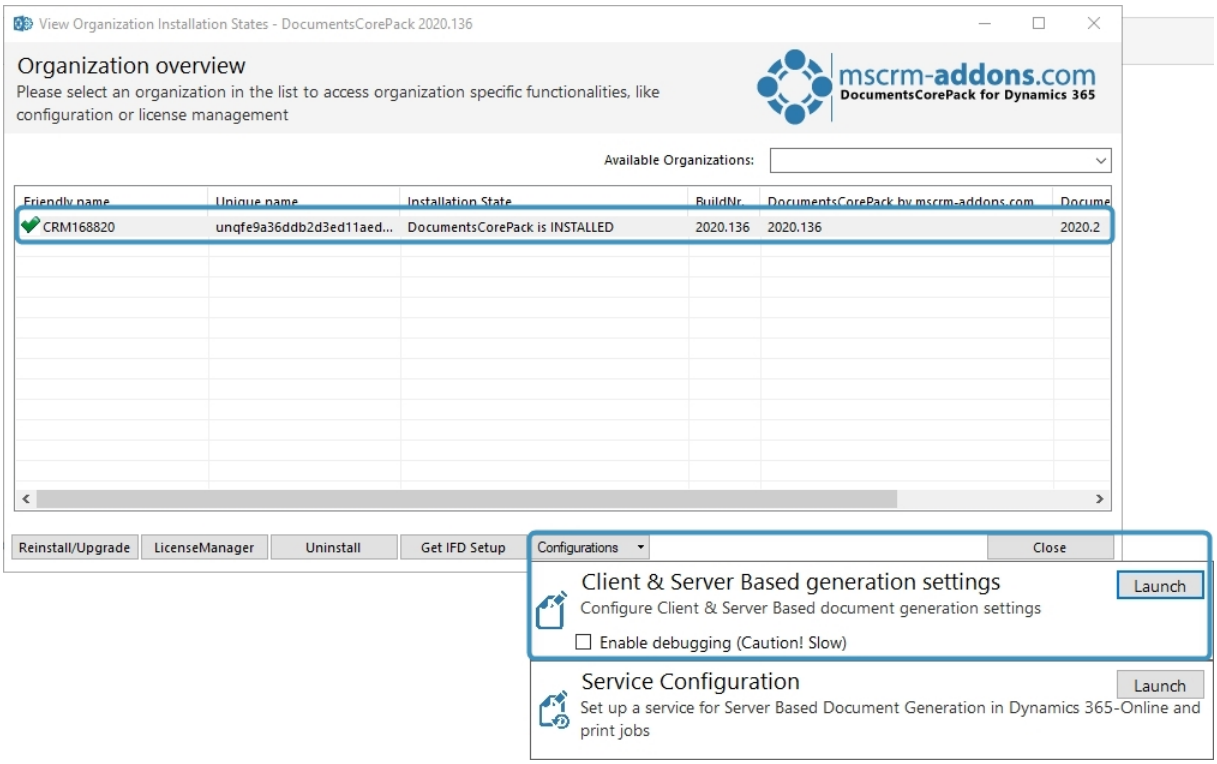


Figure 31: Click in the Organization overview Client & Server Based setting

This action will open the DocumentsCorePack Client Configuration. Select the General Settings.

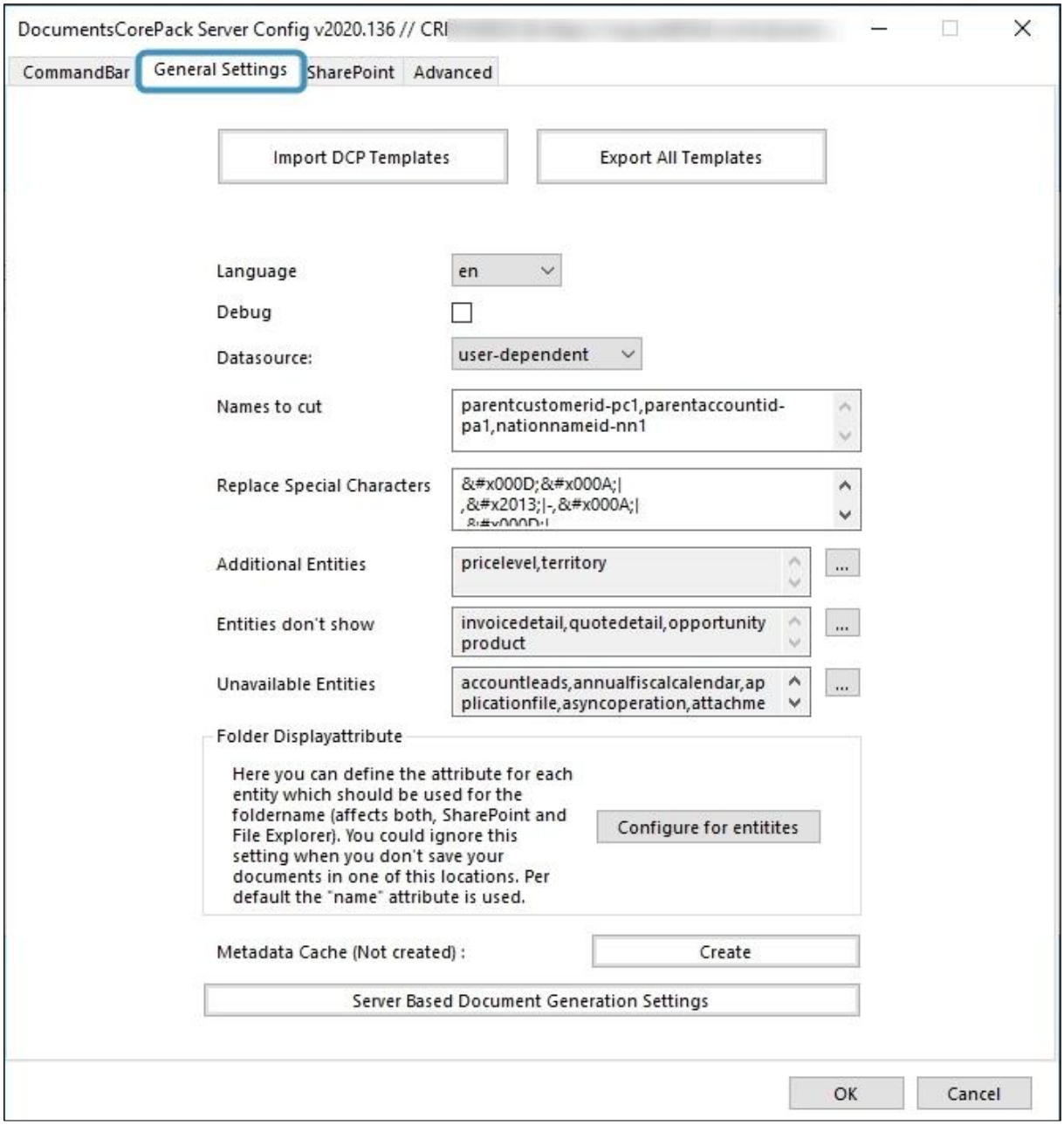


Figure 32: General Settings

From here you have the option to import and/or export templates. By clicking the [**Import DCP Templates**] button or the [**Export All Templates**] button, the Template Import Manager opens. It allows you to either import, export or transfer your DocumentsCorePack templates.

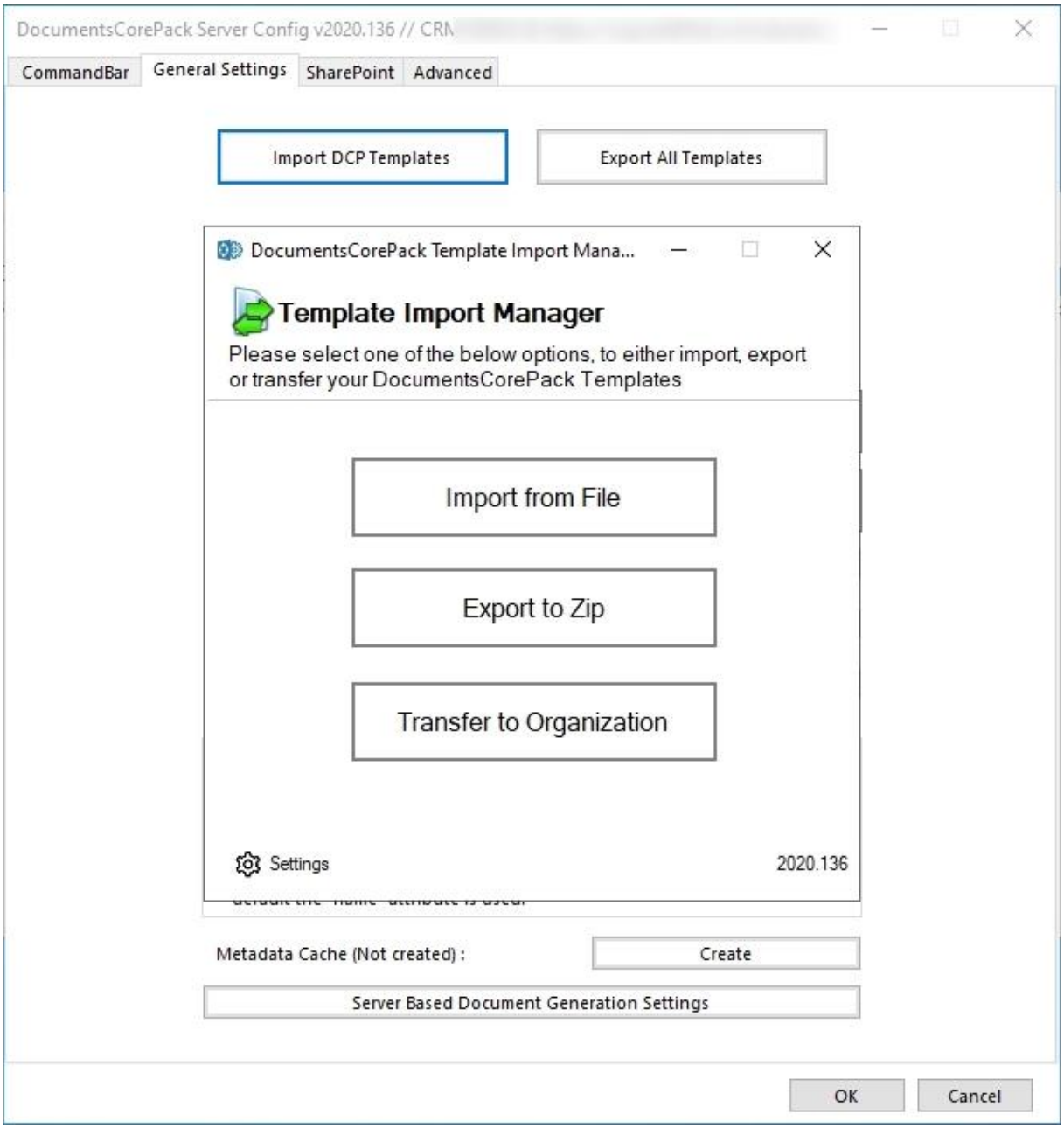


Figure 33: the template import manager

For more information about how the Template Import Manager works, please have a look at the corresponding documentation (Chapter 5 DCP Template Import Manager).

Now the templates are imported/exported in MS Word and ready to use. Next, go to the **www.mscrm-addons.com** to open the DocumentsCorePack Template Designer and click **Open Template**.

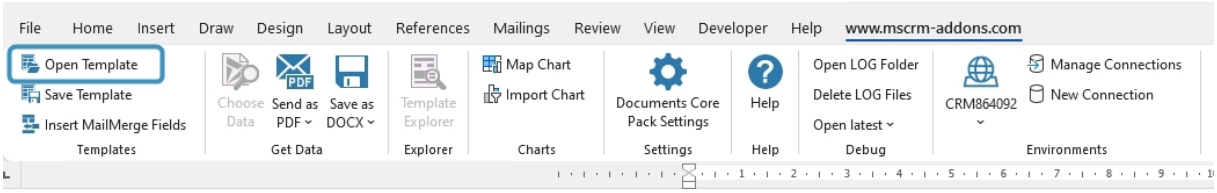


Figure 34: www.mscrm-addons.com - Open Template

7. Language Settings for DocumentsCorePack

The UI of DocumentsCorePack can be modified to any language. All UI display strings are stored in an XML File.

7.1. Language Settings on the Client

This chapter outlines how to modify the language settings on the Client.

7.1.1. Location of the Language Settings in the Client

The name of the Language XML File is: **<language>.XML**

The language file is located in the sub folder localization of the DocumentsCorePack installation folder, typically under **C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Client for Dynamics 365\Localization**.

Example: The Language file for the English UI is: en.xml

<Language setting> is the language code that DocumentsCorePack should use on the client. Each client can have its own language settings and files.

Please note: These language files can only be used if the set language is the same as the user language of your Dynamics 365 system.

7.1.2. Modify the UI on the Client

The UI language is determined during start up by the registry setting **Language**. To modify this setting, follow this procedure:

1. Press START – RUN.
2. Type **regedit** and click **OK**.
3. Locate the registry key **HKEY_LOCAL_MACHINE\Software\PTM EDVSysteme**
4. **DocumentsCorePackClient2018**.
5. Change the value of the **language** setting to another language.
6. Close the registry editor.

Please note: To use a language other than English, you need to create a copy of the **en.xml** language file and rename it for a valid language setting. For example: To create a Dutch language file, rename the file to **nl.xml** and then translate the strings in the file.

After that, you must open the registry and change the value of the **language** setting to **nl**.

7.1.3. How to translate a language file

You can use a text editor or a generic XML editor to edit the language files.

The format of the XML tags in the language file is:

```
<!-- MENU/Toolbar Name -->

<LabelValues>
        <name>MenuMainCaption</name>
        <value>Microsoft CRM</value>
</LabelValues>
<LabelValues>
        <name>MenuMainToolTip</name>
        <value>Microsoft CRM</value>
</LabelValues>
<LabelValues>
        <name>btnchoosedata</name>
        <value>Choose CRM Data</value>
</LabelValues>
<LabelValues>
        <name>tooltipchoosedata</name>
        <value>Choose CRM Data for mail merge</value>
</LabelValues>
<LabelValues>
        <name>btncrmmailmerge</name>
        <value>CRM MailMerge</value>
</LabelValues>
```

You should **ONLY** modify the contents of the <**value**> tags. Do **not modify** the <**name**> tag.

7.2. Language Settings on Server

This chapter outlines how to modify the language settings on the Server.

7.2.1. Location of the Language Settings on the Server

The UI of the DocumentsCorePack Server can be modified to any language. All UI display strings are stored in an XML File.

The name of the language XML File is: <language>.XML

The language file is located in the sub folder localization of the DocumentsCorePack installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Server for Dynamics365\Localization".

Example: The language file for the English UI is: **en.xml**

Please note: The language XML files from the server and client component are different. If you want to translate DocumentsCorePack, you must translate both files, the language file on the client and on the server.

Please note: To use a language other than English, you must create a copy of the "en.xml" language file and rename it for a valid language setting. For example: To create a Dutch language file, rename the file to "nl.xml" and then translate the strings in the file.

7.2.2. Location of the Language Settings on the Server

The UI of the DocumentsCorePack Server can be modified to any language. All UI display strings are stored in an XML File.

The name of the language XML File is: <language>.XML

The language file is located in the sub folder localization of the DocumentsCorePack installation folder, typically under **C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Server for Dynamics365\Localization**.

Example: The language file for the English UI is: en.xml

Please note: The language XML files from the server and client component are different. If you want to translate DocumentsCorePack, you must translate both files, the language file on the client and on the server.

Please note: To use a language other than English, you must create a copy of the "en.xml" language file and rename it for a valid language setting. For example: To create a Dutch language file, rename the file to "nl.xml" and then translate the strings in the file.

7.2.3. How to translate a language file

You can use a text editor or a generic XML editor to edit the language files.

The format of the XML tags in the language file is:

<!-- MENU/Toolbar Name -->

<LabelValues>
<name>MenuMainCaption</name>
<value>Microsoft CRM</value>
</LabelValues>
<LabelValues>
<name>MenuMainToolTip</name>
<value>Microsoft CRM</value>
</LabelValues>
<LabelValues>
<name>btnchoosedata</name>
<value>Choose CRM Data</value>
</LabelValues>
<LabelValues>
<name>tooltipchoosedata</name>
<value>Choose CRM Data for mail merge</value>
</LabelValues>
<LabelValues>
<name>btncrmmailmerge</name>
<value>CRM MailMerge</value>
</LabelValues>

You should **ONLY** modify the contents of the <**value**> tags. Do **not modify** the <**name**> tag.

8. Important information

If you change the NamesToCut KEY, all OLD templates will be affected, because the merge fields are still stored with the long name in your old templates.

Example: You have an existing document with two merge fields:

parentaccountid_name and parentaccountid_fax

You change the setting to shorten parentaccountid to pc1. NEW Templates will be filled correctly! (Insert Mail Merge Fields inserts the correct short name into your template.)

All OLD templates which use merge fields, and which include parentaccountid will not work anymore! So, you must edit them! (One way to do so is by using the Replace

function of Word). Sometimes it will be better to replace full merge fields. So instead of changing just a part of a merge field, let DCP replace the whole one.

For example: From "customerid_contact_parentcustomerid_address1_fax" to

"cust_cont_par_adr1_fax"; Old templates won't be affected, but you must add every field to the settings.

9. Uninstall DocumentsCorePack Server Component

To uninstall the DocumentsCorePack Server for Microsoft Dynamics 365, select **Programs and Features** in the Control Panel.

Search for the DocumentsCorePack Server for Dynamics 365 and with a right-click you can **Uninstall** DocumentsCorePack Server.

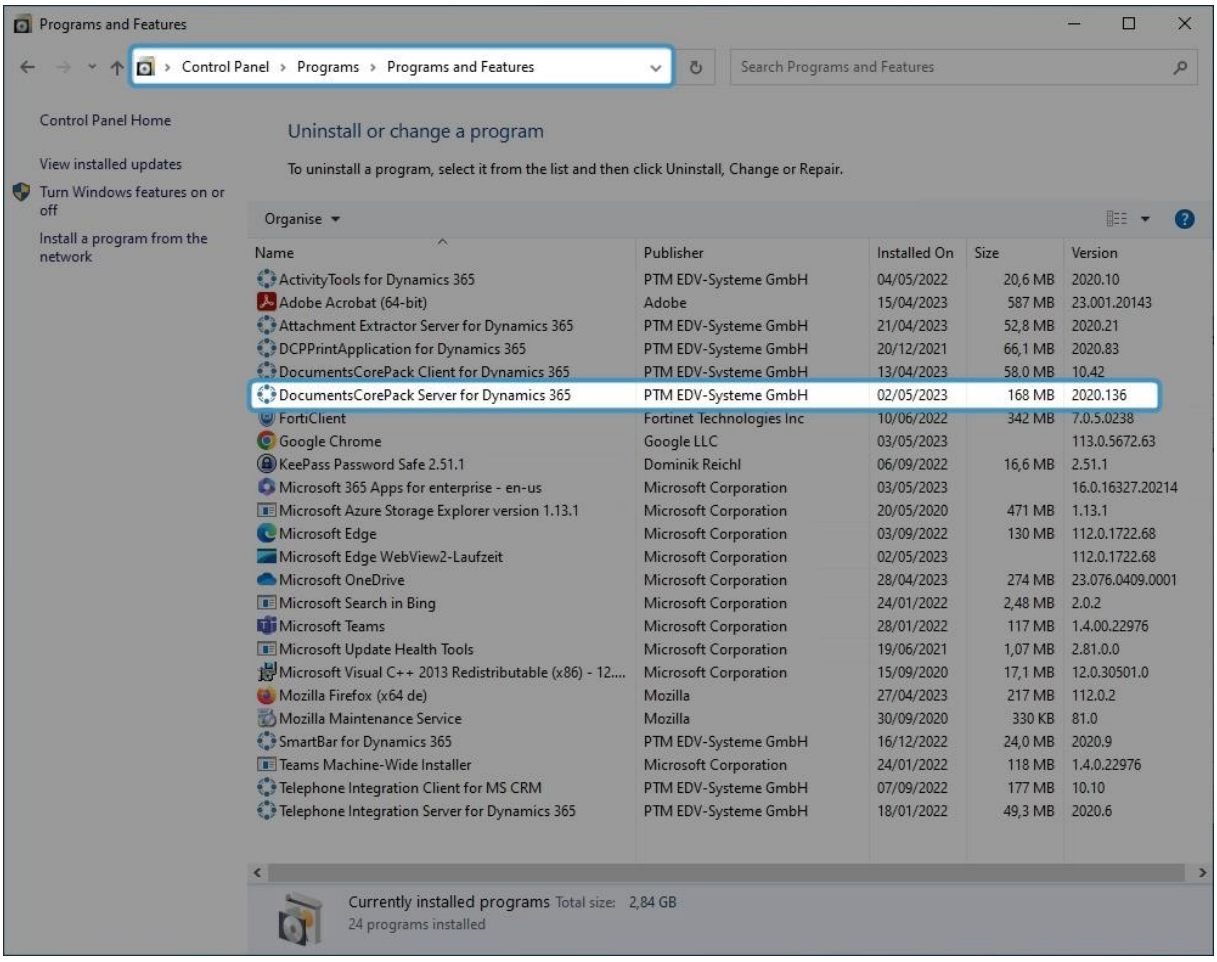
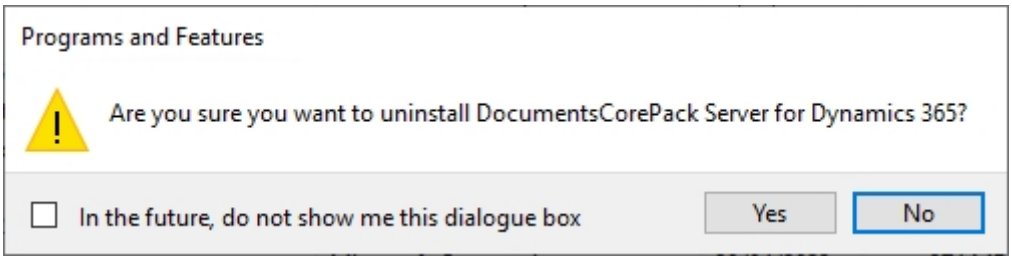


Figure 35: Uninstall DCP Server for Dynamics 365

Confirm your choice.



10. List of Figures

Figure 1: DocumentsCorePack installer for Dynamics 365 7
Figure 2: End User License Agreement (EULA) 8
Figure 3: Confirm with Install 9
Figure 4: Install the program 10
Figure 5: Install Windows Identify Foundation 11
Figure 6: Dynamics 365 Connection setup 12
Figure 7: Security roles 14
Figure 8: Default SharePoint configuration detected 15
Figure 9: Finish installation 16
Figure 10: Organization overview 17
Figure 11: Organization over - function buttons 18
Figure 12: Configurations 19
Figure 13: Client Based Document Generation 21
Figure 14: Ribbon and Navigation bar resources 22
Figure 15: Labels tab 22
Figure 16: Advanced template filtering 23
Figure 178: Save settings 24
Figure 18: Server Based Document Generation (Trial) 25
Figure 19: Command bar configuration 26
Figure 20: General Settings tab 28
Figure 21: SharePoint tab 30
Figure 22: Look for DCP Configuration in task pane 31
Figure 23: General tab 32
Figure 24: Dynamics 365 Connection Setup 33
Figure 25: The license tab 34
Figure 26: The log tab 35
Figure 27: Printer tab 36
Figure 28: Server Error - message 43
Figure 29: Windows features - WindowsIdentifyFoundation 3.5 44
Figure 30: Confirm installation selection 45
Figure 31: Click in the Organization overview Client & Server Based setting 47
Figure 32: General Settings 48
Figure 33: the template import manager 49
Figure 34: www.mscrm-addons.com - Open Template 50
Figure 35: Uninstall DCP Server for Dynamics 365 55

11. Contact

For further technical questions, please visit our blog or contact support@mscrm-addons.com. For sales and licensing questions please contact office@mscrm-addons.com or the corresponding contact information below.

Headquarter – Europe

PTM EDV-Systeme GmbH
Bahnhofgürtel 59
A-8020 Graz
Austria

Tel Austria +43 316 680-880-0
Fax +43 316 680-880-25

Support:

7AM - 7PM GMT+1 (Monday-Friday)

Sales:

+43 316 680 880 14

sales@mscrm-addons.com

www.ptm-edv.at

www.mscrm-addons.com

Headquarter – US

mscrm-addons.com Corp
1860 North Rock Springs Rd
Atlanta, GA 30324
United States

Tel US +1 404 720 6066

Support:

9AM - 6PM EST (Monday-Friday)

Sales:

+1 404 720 6046

ussales@mscrm-addons.com

www.mscrm-addons.com