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DocumentsCorePack Template Designer Installation Guide

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Table of Contents

1. HOW TO INSTALL DOCUMENTSCOREPACK TEMPLATE DESIGNER? 3

1.1. PREREQUISITES 3

2. INSTALLATION DOCUMENTSCOREPACK TEMPLATE DESIGNER 4

2.1. INSTALL THE COMPONENT ON THE TEMPLATE DESIGNER 4
2.2. END USER LICENSE AGREEMENT (EULA) 5
2.3. DESTINATION FOLDER 6
2.4. CONFIRM THE INSTALLATION 7
2.4.1. THE "WWW.MSCRM-ADDONS.COM"-TAB 8
2.4.2. REINSTALL/UPGRADE 8
2.4.3. LICENSE MANAGER 9

3. INSTALLATION ON A TERMINAL SERVER/WINDOWS SERVER 10

4. INSTALLATION ON A TERMINAL SERVER FROM DYNAMICS 365 ONLINE 11

5. UNATTENDED SETUP DOCUMENTSCOREPACK TEMPLATE DESIGNER FOR DYNAMICS 365 14

6. UNINSTALL DOCUMENTSCOREPACK TEMPLATE DESIGNER COMPONENT 16

7. LIST OF FIGURES 17

8. CONTACT 18

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Preamble

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

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

Target Audience

This guide is intended for system administrators who are familiar with the following administrative tasks:

- Maintaining and configuring a Microsoft Dynamics 365

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

- Installing DocumentsCorePack Template Designer for Microsoft Dynamics 365
- Configuring DocumentsCorePack Template Designer for Microsoft Dynamics 365

Prerequisites

One of the following versions of Microsoft Dynamics 365 must be available:

- Microsoft Dynamics CRM Server 2015/2016
- Microsoft Dynamics 365

Each product version has a different minimum Microsoft .Net Framework RTM requirement:

- **2015** requires Microsoft .NET Framework 4.5 RTM
- **2016 and 2017** requires Microsoft .NET Framework 4.5.2 RTM, or 4.6.2 if TLS 1.2 is a requirement
- **2020** and higher requires 4.6.2
- **2025** and higher requires 4.7.2

Window Identify Foundation: The Window Identify Foundation is included in the setup and will be installed as part of the DocumentsCorePack Server Installation.

Supported Operating Systems

- Windows 8 32/64bit
- Windows 8.1 32/64bit
- Windows 10 32/64bit
- Windows 11

Supported Word Versions

- Word 2010 32/64bit
- Word 2013 32/64bit

- Word 2016 32/64bit
- Word 2019 32/64bit
- Microsoft/Office 365

1. How to install DocumentsCorePack Template Designer?

You can install the DocumentsCorePack Template Designer on every supported operating system which is able to connect to your Dynamics 365 instance. During the installation, you must specify at least one organization where the DocumentsCorePack Template Designer will be connected to.

Additional connections can be defined once the setup is completed.

1.1. Prerequisites

Before proceeding with the installation, it is necessary to download the DocumentsCorePack Template Designer. Be aware that DocumentsCorePack should already be running in your environment. There are two options for accessing it:

Online Service: You can sign up for DocumentsCorePack as an online service on our website. This allows you to use the application directly through your web browser without local installation.

On-Premise Service: Alternatively, you can install DocumentsCorePack as an on-premise service.

2. Installation DocumentsCorePack Template Designer

Please note: Important before installing the components:

- Close all Office products (MS Word, MS Outlook…)
- Be sure that the machine is online to the Dynamics 365 server

To ensure that Word and Outlook are not running, start the Windows **Task Manager** and check that WINWORD.EXE and OUTLOOK.EXE are not running in the processes list. Find the download file here.

2.1. Install the component on the Template Designer

Run the **DocumentsCorePack Template Designer for MS Dynamics 365.exe** setup file. Hit in this window the **Next** button to continue with the license agreement.

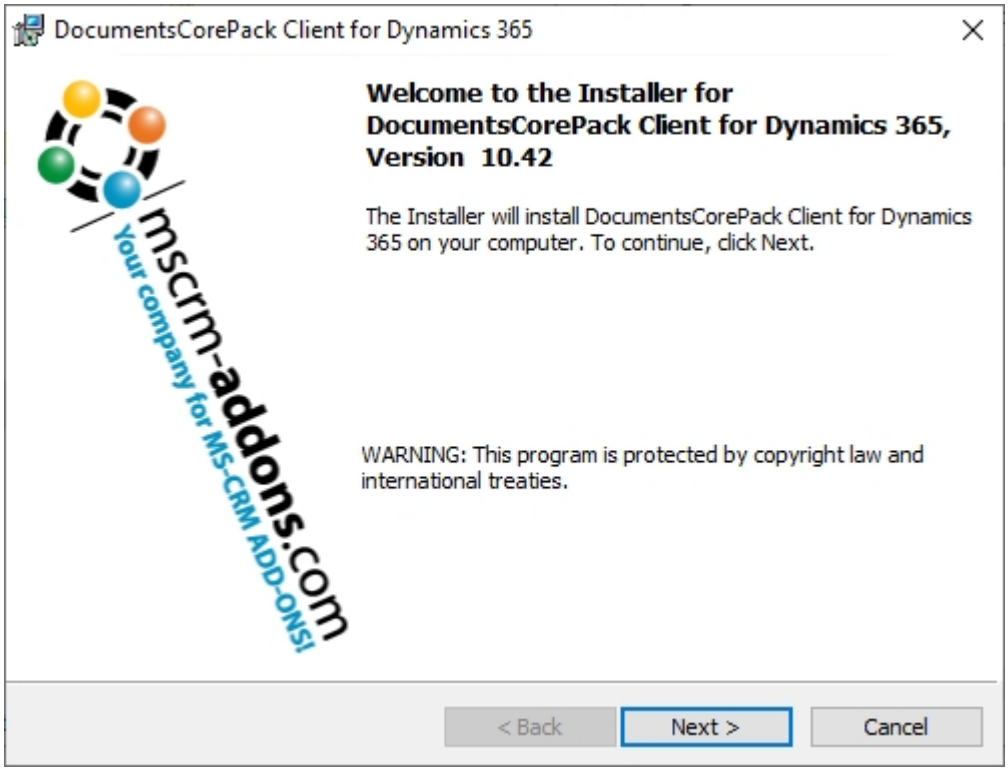

Figure 1: Installer DCP Template Designer for Dynamics 365

2.2. End User License Agreement (EULA)

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

Figure 2: End User License Agreement (EULA)

2.3. Destination Folder

Click **Next** to install to this folder or click **Change** to install to a different folder.

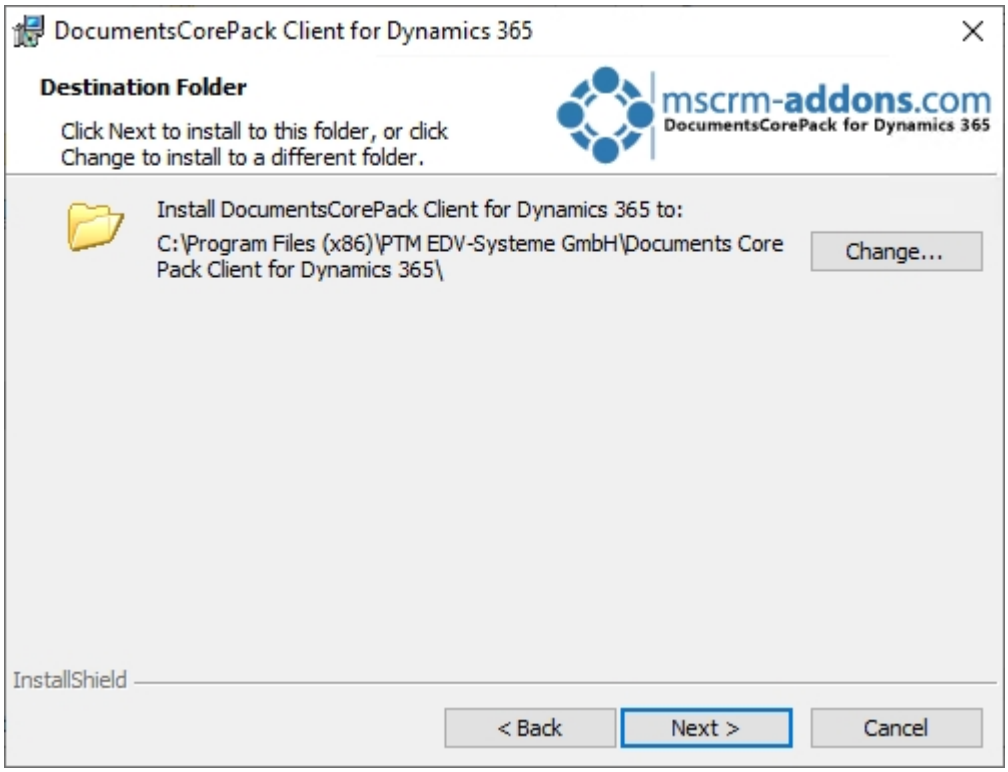

Figure 3: Destination folder

2.4. Confirm the installation

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

The 2 **Back** button allows you to go back to e.g., change the installation folder.

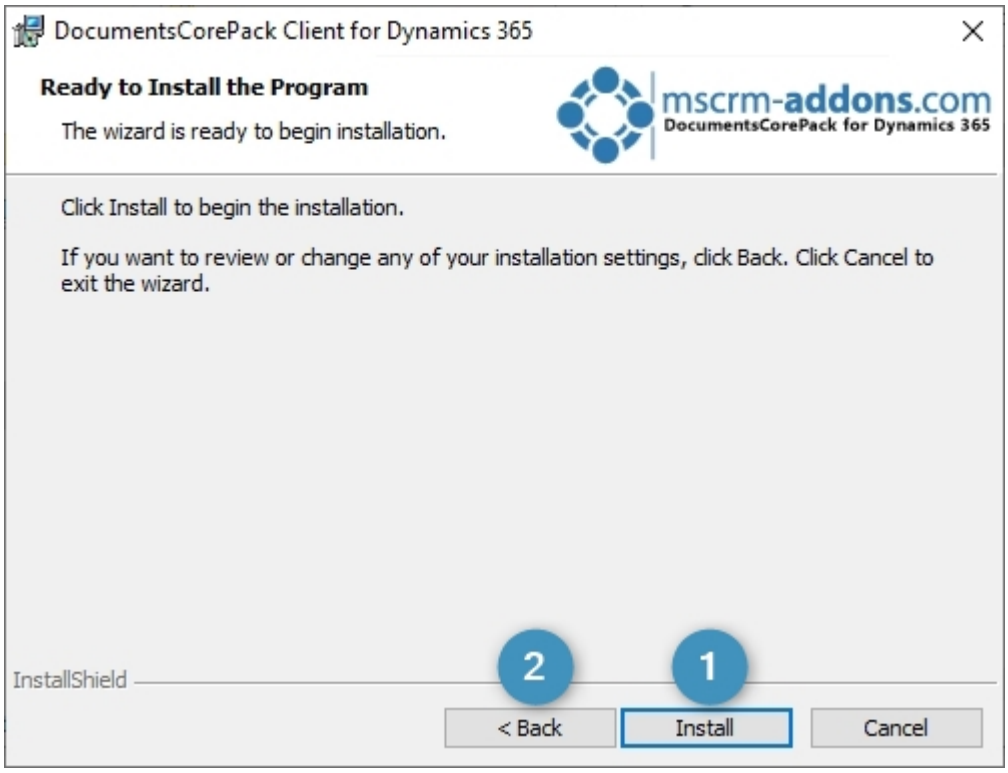

Figure 4: Install the program or go back

DocumentsCorePack TemplateDesigner is installing.

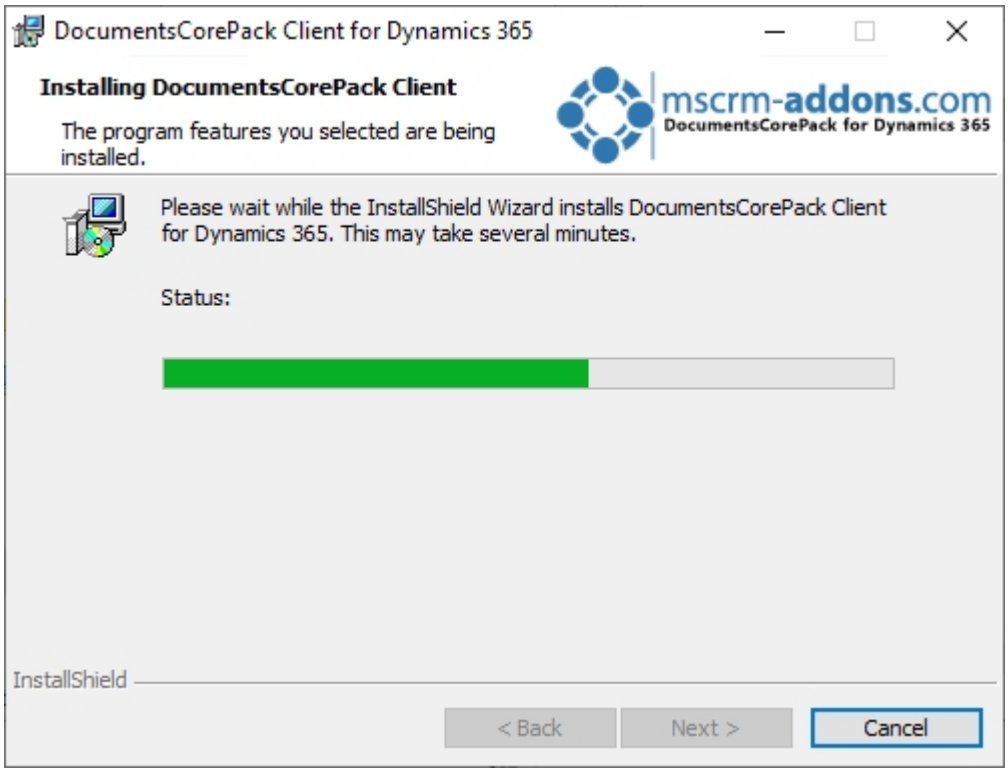

Figure 5: DCP Template Designer is installing

Now you can connect your Dynamics 365 to your DocumentsCorePack

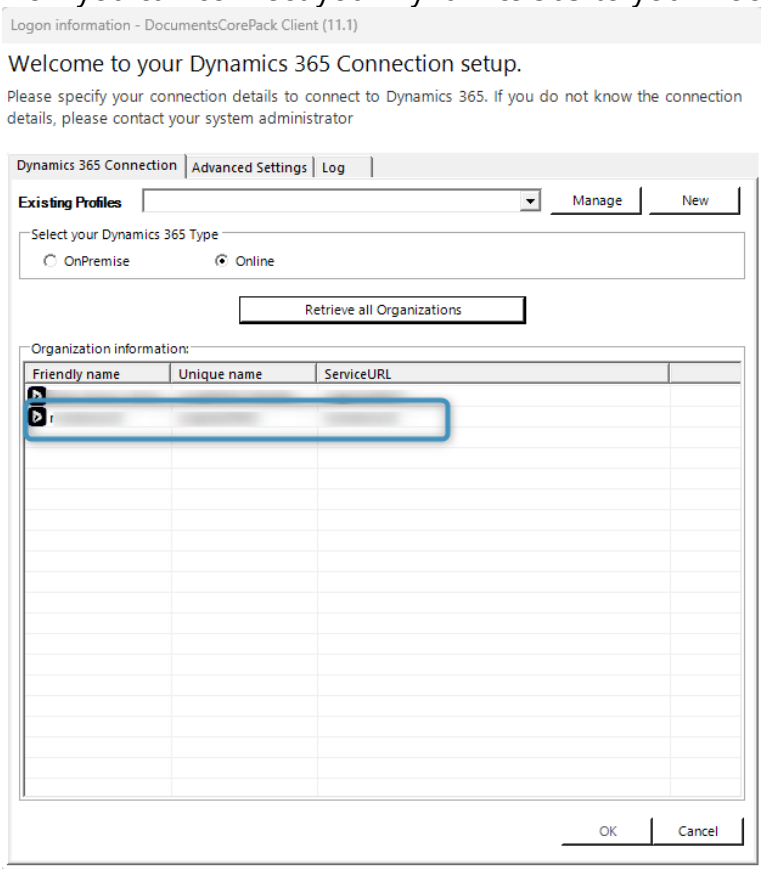

Figure 6: Dynamic365 connection setup tab

Step 1: Enter a valid Username, and Password which is connected to your Dynamic 365.

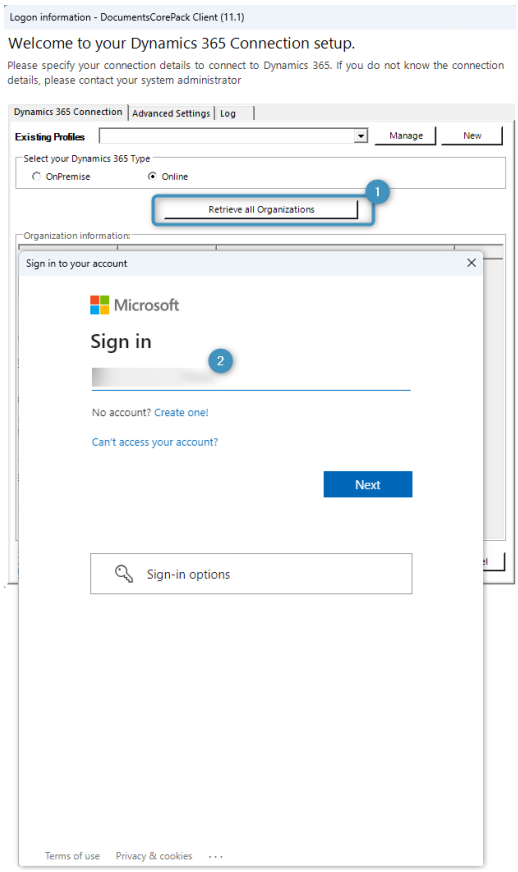

Figure 7: Enter Login credentials for initial installation

Step 2: Now you can save your profile.

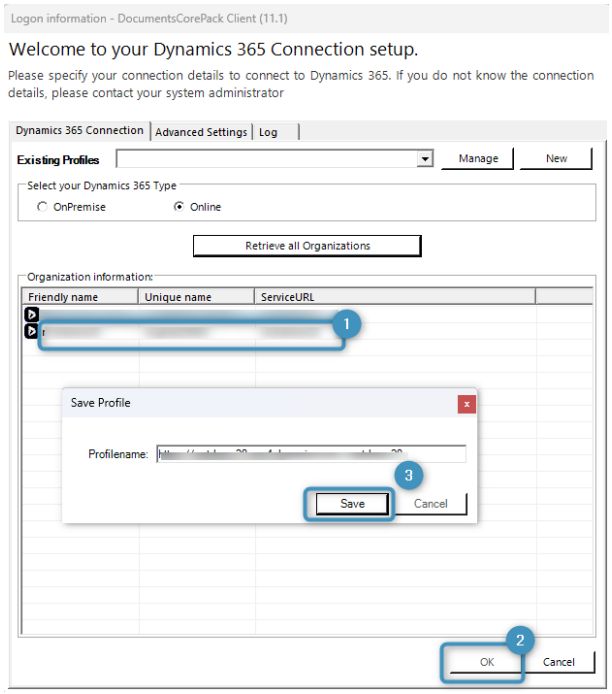

Figure 8: Save your Profile to start your service.

2.4.1. The “www.mscrm-addons.com”-tab

Once having finished the installation, go to your MS Word and you will see the **www.mscrmaddons.com**-tab on the ribbon. It contains several options, like create a template with the **Insert MailMerge Fields** option or send the document as a .pdf. For more information have a look in the User Guide.

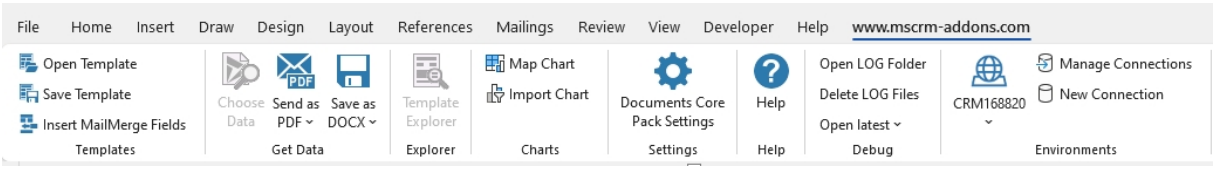

Figure 9: The www.mscrm-addons.com tab

2.4.2. Reinstall/Upgrade

With this button you can upgrade your solution to the latest version.

2.4.3. License Manager

If you are using the DocumentsCorePack Template Designer for DocumentsCorePack or using the DocumentsCorePack Template Designer with a per-user license, you might see the following message: **accessDenied**. This indicates that the user does not have a license applied.

If the per User license count is higher than the system value number, you can claim a license yourself by using the **Claim License** button at the bottom right corner. This option is only visible if you have a per User license. For any other license type, this option will not be available. Learn more about how to claim a license.

3. Installation on a Terminal Server/Windows Server

To install DocumentsCorePack on a terminal server, you have to open the Control Panel and then the **Programs** option. Now click on **Programs and Features** option and on the left side select **Install a program from the network** and select the DocumentsCorePack Setup file. The Installation wizard will help you through the installation (have a look at Chapter 2).

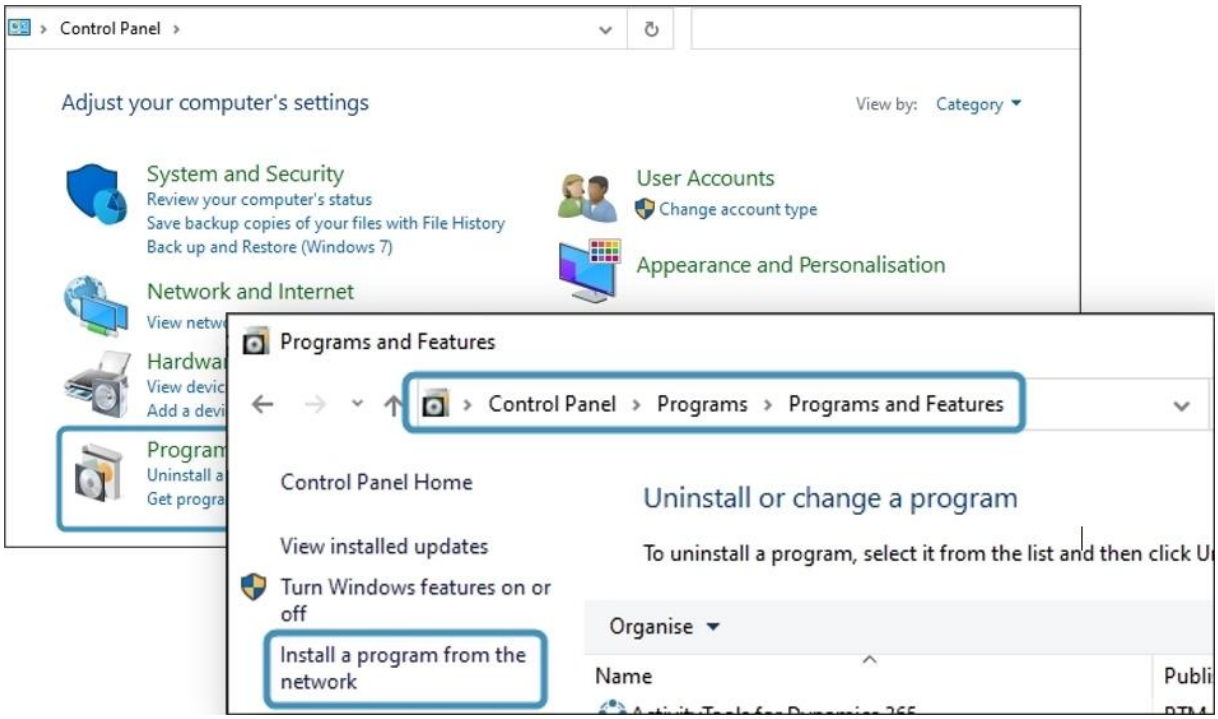

Figure 10: Contol Panel – Programs – Programs and Features – Install program from the network.

4. Installation on a Terminal Server from Dynamics 365 Online

When installing DocumentsCorePack on a terminal server for Dynamics 365 Online, you have to provide your Login Credentials for the initial installation. Enter a valid Username, and Password.

Step 1: Enter a valid Username, and Password.

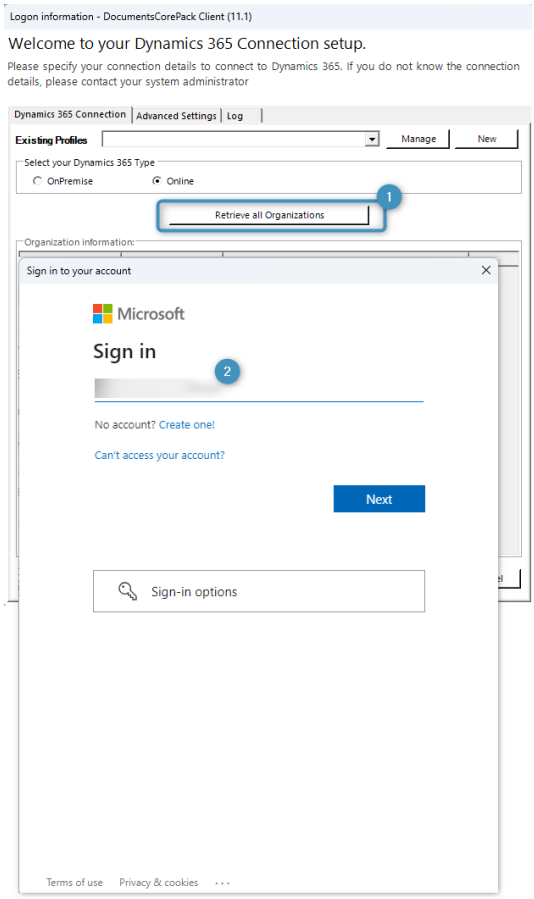

Figure 11: Login credential for initial installation

Step 2: Now you can save your profile.

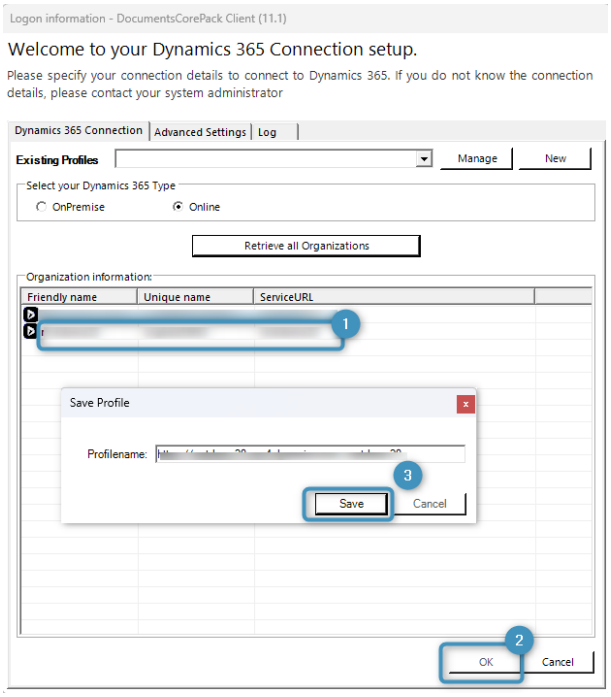

Figure 12: Save profile to start your service.

You have to modify the registry so other users are able to create a connection with their own login credentials easily when they start using DocumentsCorePack for the first time on the Terminal Server.

1. Open the Registry Editor

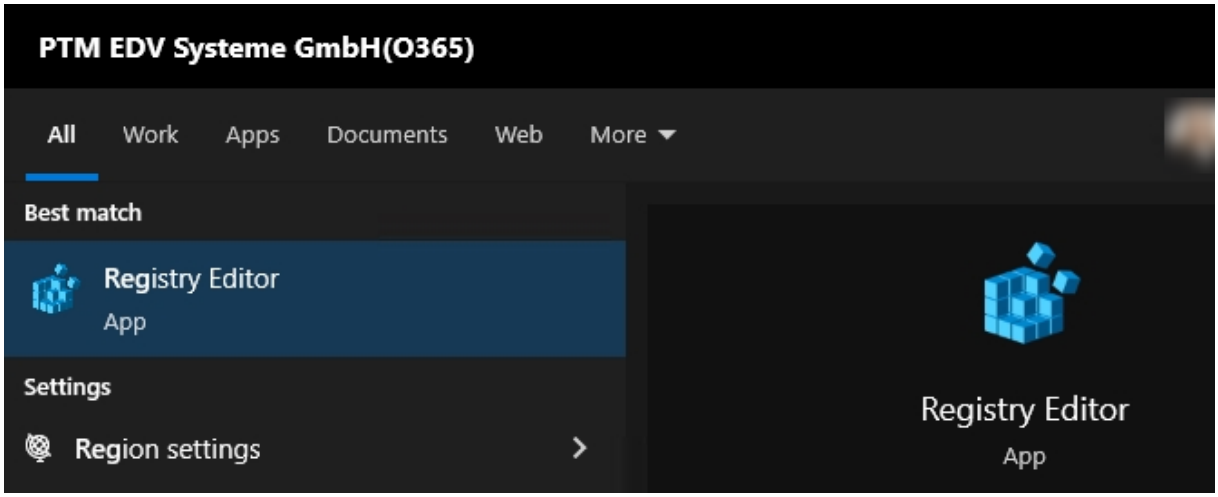

Figure 13: Open Registry Editor

2. Now browse to **HKEY_LOCAL_MACHINE\SOFTWARE\PTM EDVSysteme** and choose the configured profile (you can see the profile used in the **HKLM\SOFTWARE\PTM EDV Systeme\DocumentsCorePackclient2011\ActiveProfileSetting**).

Please note: Dependent on the architecture of your server (x86 or x64) the location may vary **HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\PTM EDVSysteme**\. If this node is present, please also perform the following modification for these registry keys.

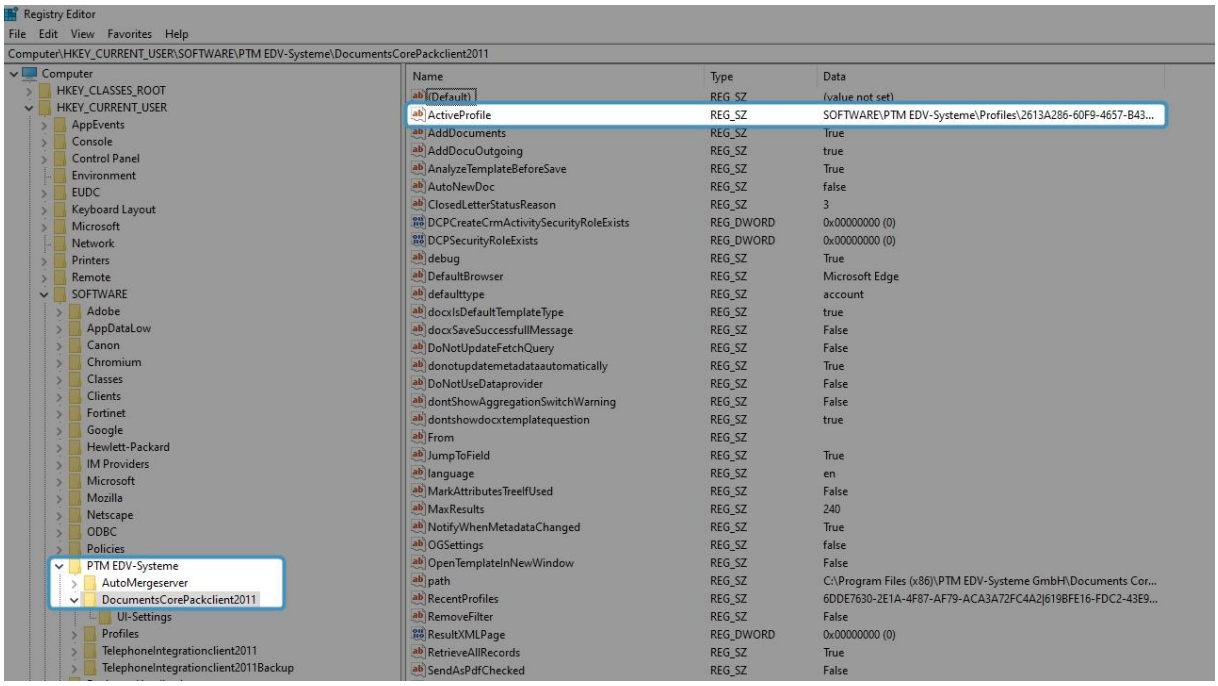

Figure 14: Registry Editor - ActiveProfile

3. Next, select the correct profile and search for the **CrmUserName** key.

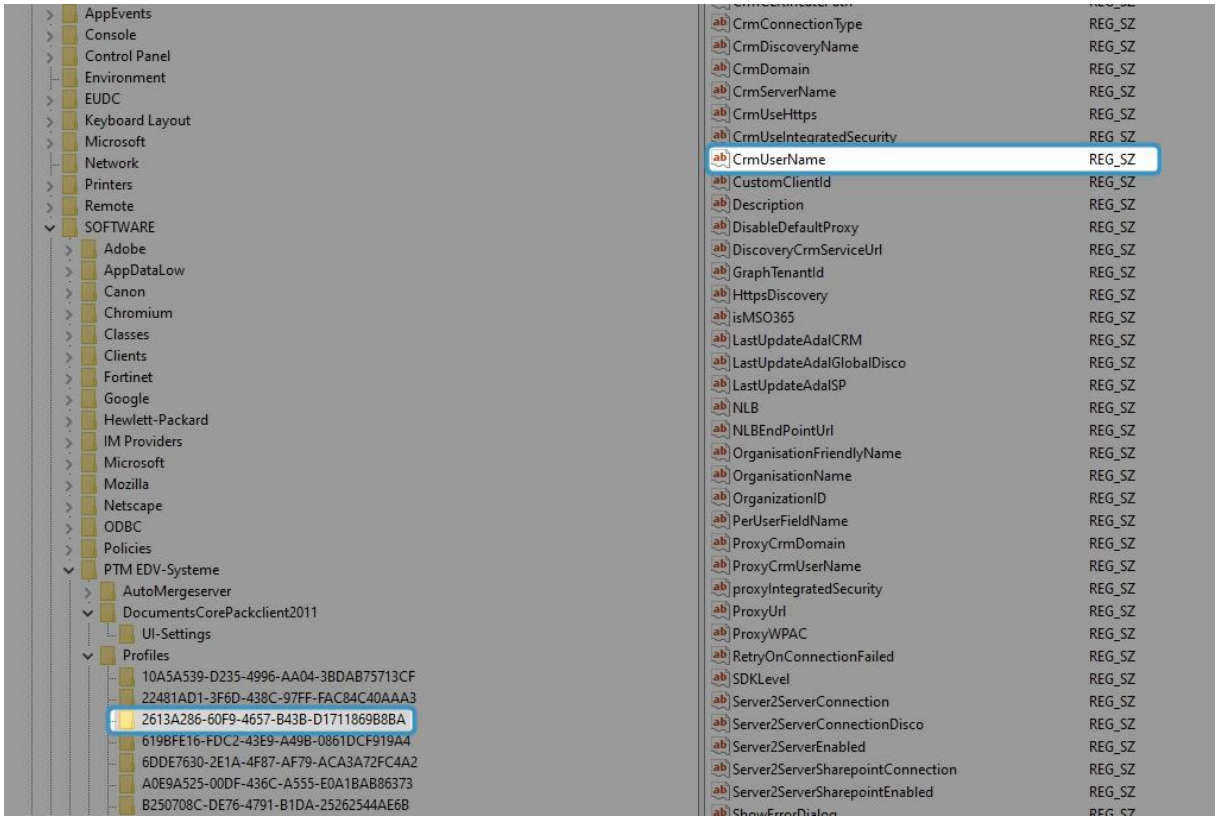

Figure 15: CrmUserName key

4. Now change the existing key from your actual username to e.g., EnterYourUsername@onmicrosoft.com. It is important that the domain is still the same as for your login.

Figure 16: Enter CrmUserName

That is all you need to do. If a different user logs in for the first time on the server, he will be presented this dialog as soon as he tries to use DocumentsCorePack and can enter their user-specific credentials.

ATTENTION: These steps will only work, if the actual users do not have an actual profile yet, which is only the case on initial installation.

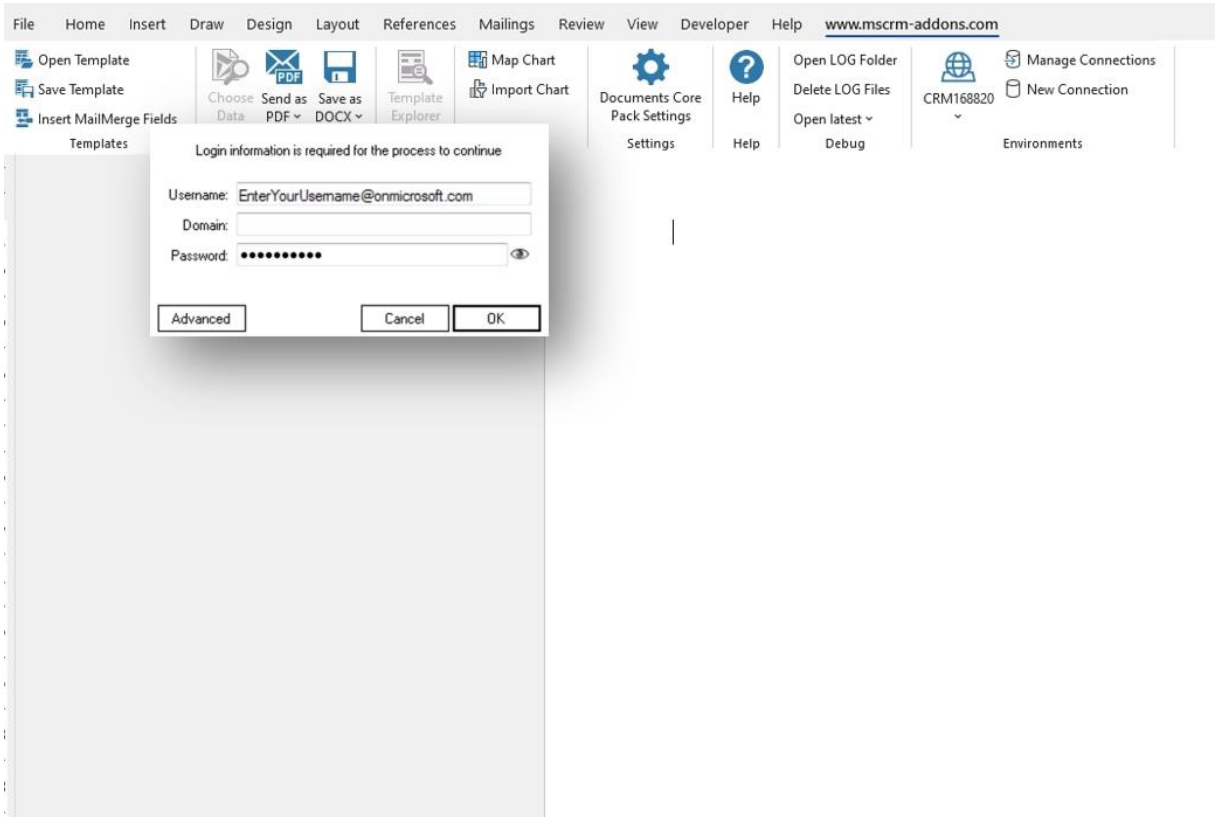

Figure 17: Log in on a Terminal server using DCP for the first time

5. Unattended Setup DocumentsCorePack Template Designer for Dynamics 365

To install the DocumentsCorePack Template Designer for Microsoft Dynamics 365 unattended, you need to supply a registry file with the required registry settings. The unattended install is available for the DocumentsCorePack Template Designer Version 5.18 and above.

ATTENTION: The Microsoft Windows Identity Foundation software MUST be present before the installation, or the installation will fail.

In the files below, you can download templates to perform the unattended install. They are set up for x86 and x64 systems.

The templates contain inline documentation regarding the possible settings that can be set for the Template Designer application.

The described keys and place holder have to be replaced to have a valid registry file for the installation process.

Please note: The current examples are set up for **http**. If you are using **https** you also have to adjust the protocol in these files!

uai_RegCRM2013_x86_x64.reg (8.90 kb)
uai_RegCRM2011_x86_x64.reg (8.88 kb)

This blank registry file containing all required keys. You need to replace the following tags with your actual CRM data:

YOURCRMSERVER:PORT: The URL of the CRM server without any protocol nformation, e.g., crm:5555

UNIQUEORGANISATIONNAME: The unique name of the organization you want to connect to

These both keys also have to be applied to the

DiscoveryCrmServiceUrl=[PROTOCOL]:
//[YOURCRMSERVER:PORT]/[UNIQUEORGANISATIONNAME]
/XRMServices/2011/Organization.svc.

PROTOCOL: Either http or https.

ORGANISATIONFRIENDLYNAME: The display name of the organization.

OrganisationFriendlyName contains the Organization name.

While not vital, it should be changed to reflect the correct Organizsation name. The path variable in the templates has to be adjusted as well depending on the architecture of the Template Designer.

(Program Files (x86) or Program Files)

If your discovery service is using Https (Usually it's the same protocol as your CRM), the entry

HttpsDiscovery

needs to be set to **true**.

You can then launch the setup with the prepared registry file similar to the batch file launch.bat (116.00 bytes)

[DocumentsCorePackInstallFolderAndFile]" /V"/qb /lvx* C:\instlog.txt UAIREGFILE=[RegFileLocation]\[RegistryFileName].reg"

The tags **DocumentsCorePackInstallFolderAndFile** needs to point to the correct installation source folder and filename.

RegFileLocation needs to point to the folder of the prepared registry file.
If you have changed the registry filename previously, you need to adapt this change in the command as well.

RegistryFileName: The filename has to be adjusted depending on the file you are going to use for the install process.

6. Uninstall DocumentsCorePack Template Designer Component

To uninstall DocumentsCorePack Template Designer for Microsoft Dynamics 365 select **Programs and Features** in the **Control Panel**. Search for the **DocumentsCorePack Client for Dynamics 365** in **Uninstall or change a program** and click on **Uninstall**.

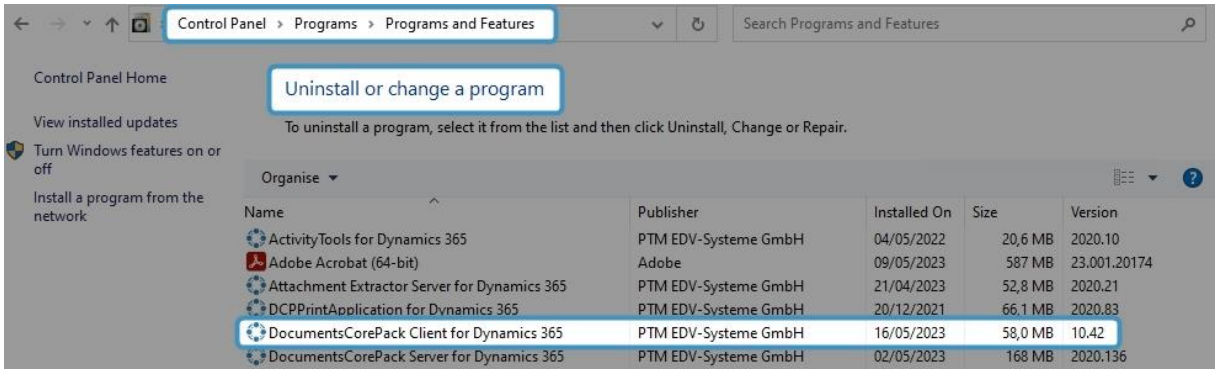

Figure 18: Uninstall DocumentsCorePack Template Designer

In this window confirm with **Yes.**

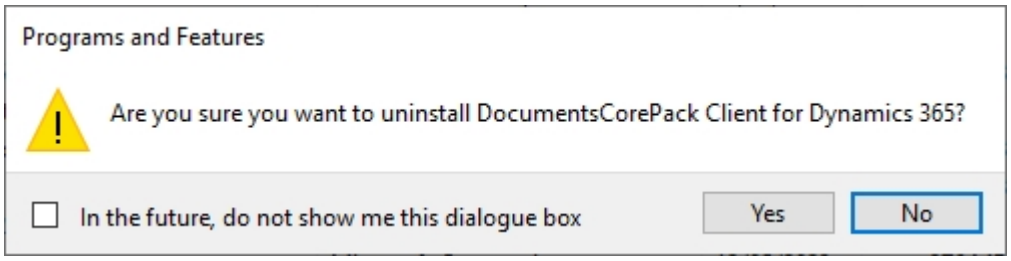

Figure 19: Confirm to uninstall

7. List of Figures

Figure 1: Installer DCP Template Designer for Dynamics 365 4
Figure 2: End User License Agreement (EULA) 5
Figure 3: Destination folder 6
Figure 4: Install the program or go back 7
Figure 5: DCP Template Designer is installing 8
Figure 6: Dynamic365 connection setup tab 8
Figure 7: Enter Login credentials for initial installation 9
Figure 8: Save your Profile to start your service. 9
Figure 9: The www.mscrm-addons.com tab 10
Figure 10: Contol Panel – Programs – Programs and Features – Install program from the network. 12
Figure 11: Login credential for initial installation 13
Figure 12: Save profile to start your service. 14
Figure 13: Open Registry Editor 14
Figure 14: Registry Editor - ActiveProfile 15
Figure 15: CrmUserName key 15
Figure 16: Enter CrmUserName 16
Figure 17: Log in on a Terminal server using DCP for the first time 17
Figure 18: Uninstall DocumentsCorePack Template Designer 19
Figure 19: Confirm to uninstall 20

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