mscrm-addons.com
AutoMerge for MS CRM 3.0

AutoMerge for MS CRM 3

Version 1.0.0

Users Guide
(How to use AutoMerge for MS CRM 3)

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1 Users Guide

1.1 *Introduction*

AutoMerge for MS CRM 3 provides you with the opportunity to automate WordMailMerge for MS CRM 3 for daily/weekly/monthly tasks through an XML configuration file or from a workflow rule. You can perform these three actions with AutoMerge:

1. Print the document.
2. Save the document.
3. Create a CRM letter activity.

1.2 *IMPORTANT INFORMATION*

Please note the following guidelines for using AutoMerge for MS CRM 3:

1. **DON'T use Word** while AutoMerge is running
2. **DON'T use WordMailMerge** Client while AutoMerge is running.
3. Only **ONE** instance of AutoMerge is possible.

2 XML Configuration File

2.1 *Overview of the configuration file*

```xml
<?xml version="1.0" encoding="utf-8" ?>
<automerge>
    <log>
        <console>true</console>
        <file path='C:\temp\Tutorial\automerge.log'>true</file>
    </log>
    <fetches>
        <fetchxml template='C:\temp\Tutorial\Account Reconnect.dot'>
            <config>
                <save path='C:\temp\Tutorial'>true</save>
                <print printername='SnagIt 7'>true</print>
                <createcrmactivity subject='Account Reconnect'>
                    false
                </createcrmactivity>
            </config>
            <fetch mapping='logical'>
                <entity name='account'>
                    <attribute name='accountid'/>
                    <filter type='and'>
                        <condition
                        attribute='address1_stateorprovince'
                        operator='eq'
                        value='CA'/>
                    </filter>
                </entity>
            </fetch>
        </fetchxml>
    </fetches>
</automerge>
```

2.2 Elements

2.2.1 Logging

```
<log>
    <console>true</console>
    <file path='C:\temp\Tutorial\automerge.log'>true</file>
</log>
```

In the log-node of the configuration file you can specify where to log the protocol. Either to the console and/or to a specific file.

1. Log to console:
   Description: Prints out the protocol to the console.
   Valid values are "true" to enable or "false" to disable.
2. Log to file
   Description: Saves the protocol to a specific file.
   Valid values are "true" to enable or "false" to disable. With the "path"-attribute you must specify the file in which the protocol should be written. If the file already exists, the protocol is appended to the end of the file. If the file doesn't exist, a new file is created where the protocol would be saved. If you do not specify a file, logging is disabled. If the path does not exist, the default log file is chosen ("automerge.log" in the installation directory)
   Important: The path to the file must exist (regardless if the file exists or not). If the path does not exist, the default logging file is chosen.

2.2.2 Fetches

```
<fetches>
    <fetchxml template='C:\temp\Tutorial\Account Reconnect.dot'>
        ...
    </fetchxml>
</fetches>
```

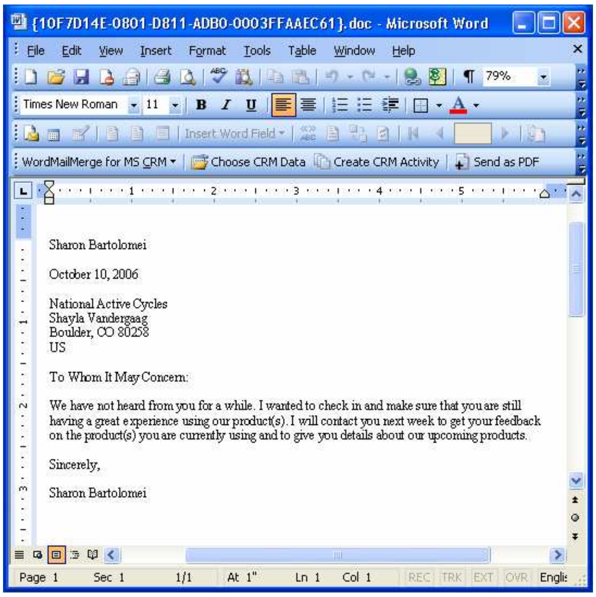
Description: Defines the WordMailMerge template.
Within the fetches-node of the configuration file you can specify as much `<fetchxml>`-blocks as you like. Every block will be executed. If an error occurs in one of the blocks, the other blocks will still be executed.
The "template"-attribute specifies which template for the mail merge should be used. If the file does not exist or no template is defined, the `<fetchxml>`-block will not be executed.
Important: The template must be a WordMailMerge template and the entity of it must be equivalent to the entity which is defined in the fetch-statement.

2.2.3 Fetch – Config

```
<fetchxml template='C:\temp\Tutorial\Account Reconnect.dot'>
    <config>
        <save path='C:\temp\Tutorial'>true</save>
        <print printername='SnagIt 7'>true</print>
        <createcrmactivity subject='Account Reconnect'>
            true
        </createcrmactivity>
    </config>
    <fetch mapping='logical'>
        ...
    </fetch>
</fetchxml>
```

Within the config-node you can specify the actions which should be performed for the fetch.

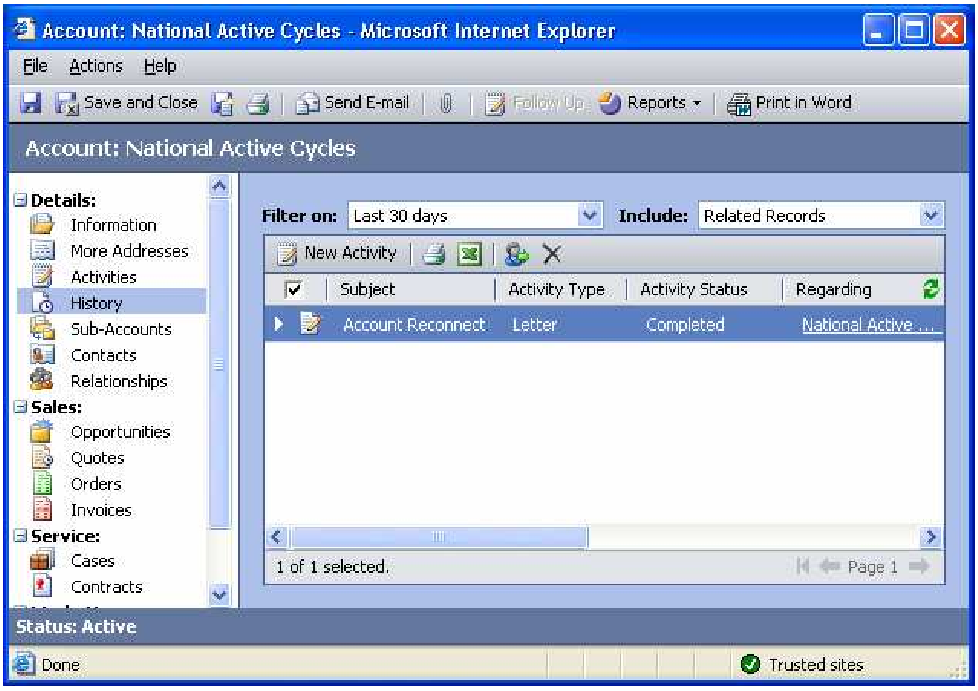
1. Save the document
   With the <save>-element you can specify if the file should be saved or not. Valid values are "true" to enable saving and "false" to disable. With the "path"-attribute you must specify the path where the documents should be saved. For each run of AutoMerge, a subdirectory with the format "Globally Unique Identifier" is created. In this subdirectory, every <fetchxml>-block creates a directory in which the documents are been saved. The filename is the GUID which represents the result of the fetch. In this example, the documents are been saved to "C:\temp\Tutorial\5907d96e-c9c0-496c-8e1f-471d920780c9\1\". The last subdirectory represents the number of the current <fetchxml>-block. If there is a second block, it would be saved into "directorywhereyouspecify\5907d96e-c9c0-496c-8e1f-471d920780c9\2\". This mechanism prevents you from overwriting existing files.
   Important: If the path does not exist, saving is disabled and the documents are not saved to disk.



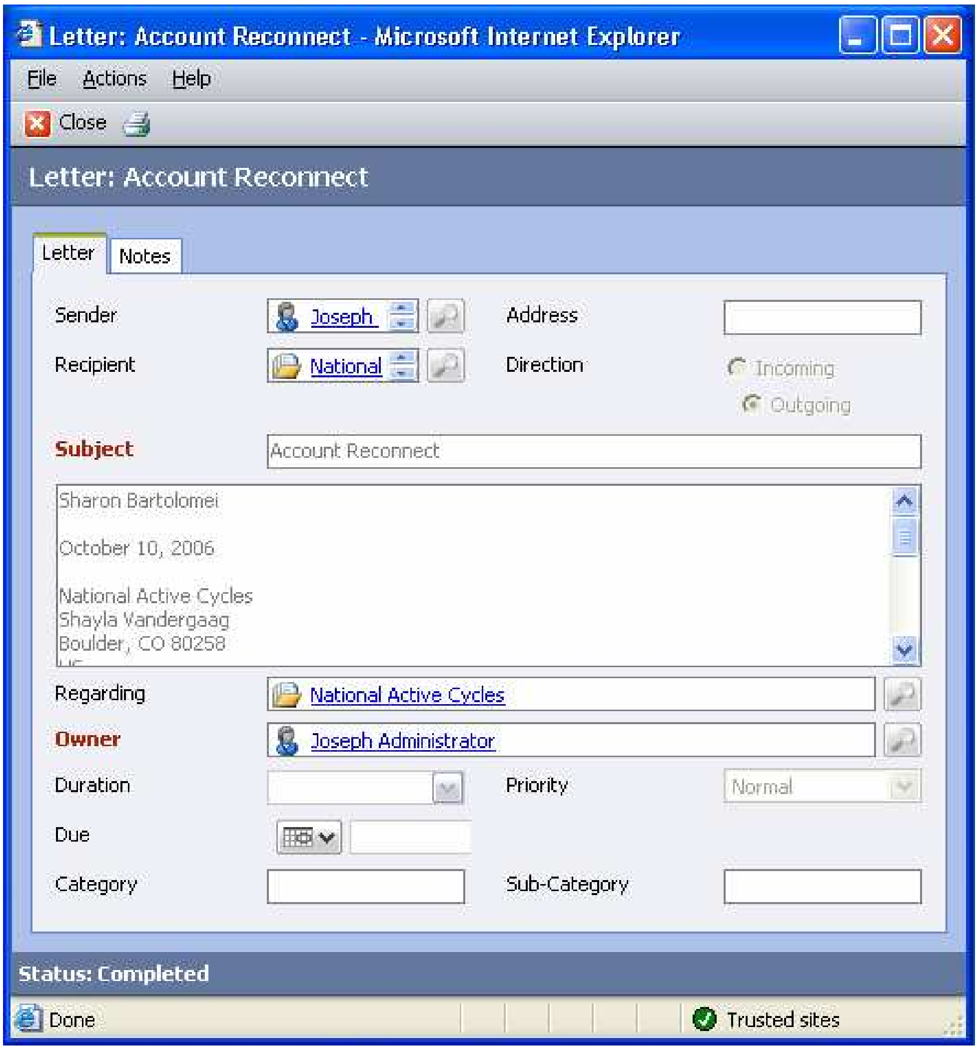
Example of the saved document.

2. Print the document
   With the <print>-element you can specify if the document should be printed. Valid values are “true” to enable printing and “false” to disable it. The “printername”-attribute defines the printer which should be used.
   Important: The name of the printer must exactly been written or else printing is disabled.

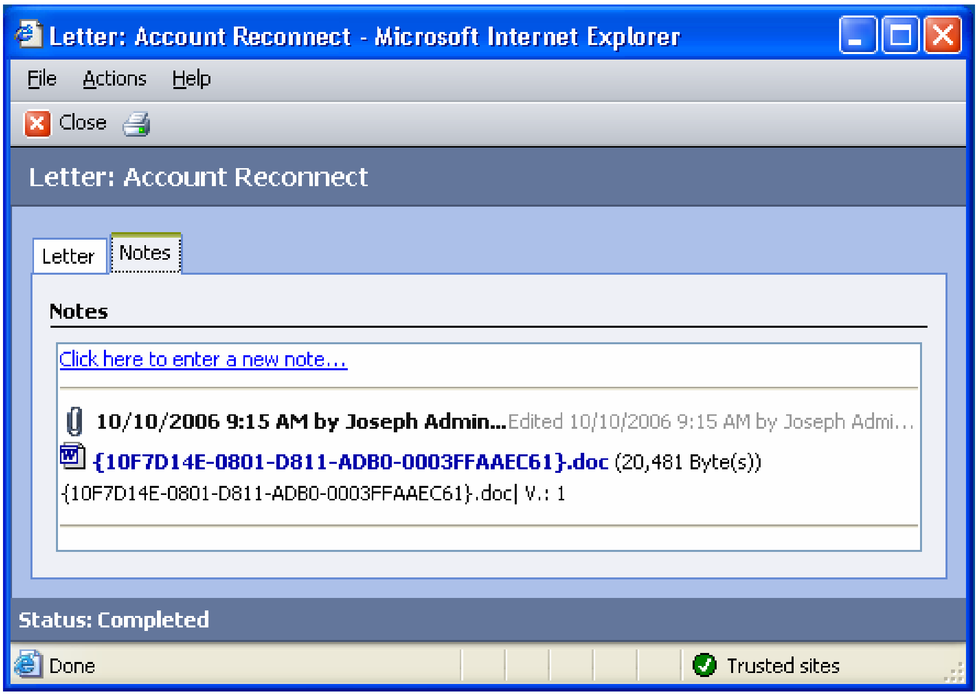
3. Create CRM activity
   Here you can create a closed letter activity into MS CRM. The document would be attached to the associated GUID. Valid values are “true” to enable or “false” to disable. The “subject”-attribute defines the subject of the letter activity in the MS CRM system.
   Important: If no activity subject is defined, it would be disabled.



Example of the saved letter activity in the history of the account.



Here you see the letter activity details in the MS CRM system.



Here is the original MS Word document attached to the MS CRM system.

2.2.4 Fetch

```
<fetch mapping='logical'>
    <entity name='account'>
        <attribute name='accountid'/>
        <filter type='and'>
            <condition
            attribute='address1_stateorprovince'
            operator='eq'
            value='CA'/>
        </filter>
    </entity>
</fetch>
```

Here you can define your fetchxml-statement. It’s very important that you ONLY return GUIDs. The entity you define must be equivalent to the entity for which the template is for.

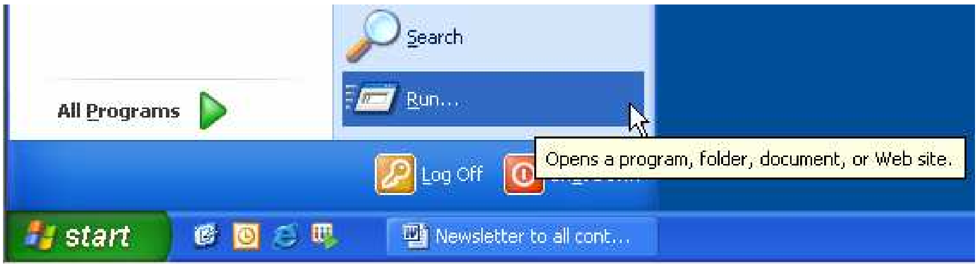
3 Using HTTPS

If you use HTTPS for WordMailMerge you must also specify the certificate for AutoMerge. You must rename the certificate to “cert.cer” and put the file into the installation directory of AutoMerge. Typically on “C:\Program Files\PTM EDV-Systeme GmbH\AutoMerge for MS CRM 3”. HTTPS is only enabled, if it is also enabled for WordMailMerge.

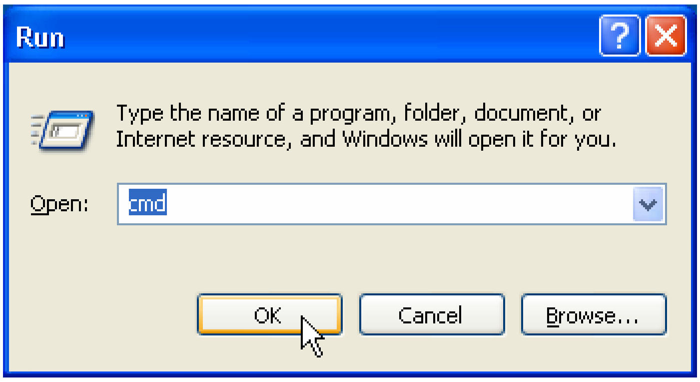
4 Start AutoMerge – Step-by-Step

With the following steps you learn how to use AutoMerge for MS CRM 3.

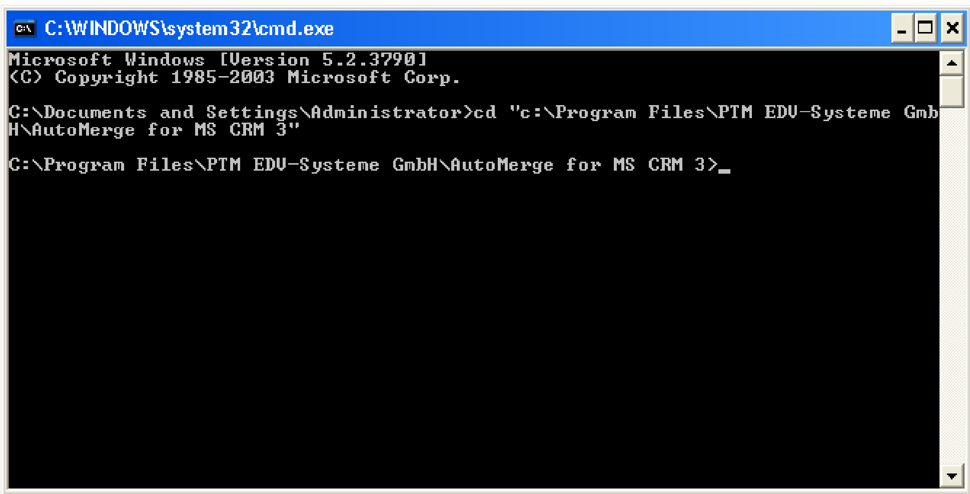
1. Click on the "Start"-button and select "Run…"



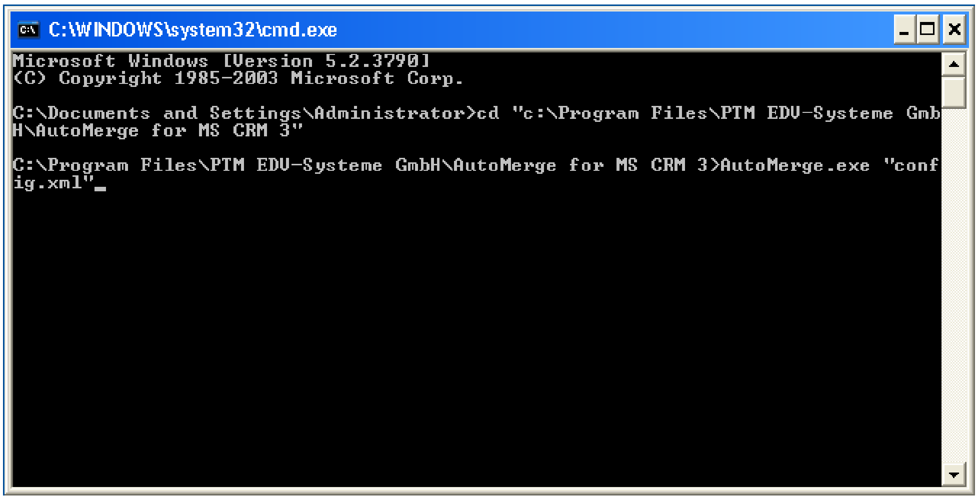
2. Enter "cmd" into the upcoming dialog and click "OK".



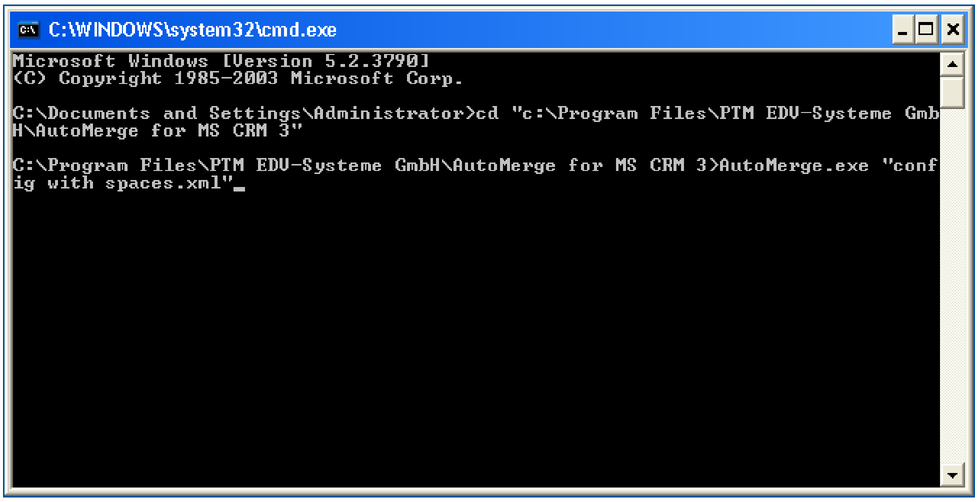
3. A console window appears
   Change the directory to the installation directory of AutoMerge.
   Typically on "C:\Program Files\PTM EDV-Systeme GmbH\AutoMerge for MS CRM 3"
   To change to this directory, enter "cd <installationpath>" into the console window.
   Note: For paths that contains spaces, always enclosure it within double quotes.



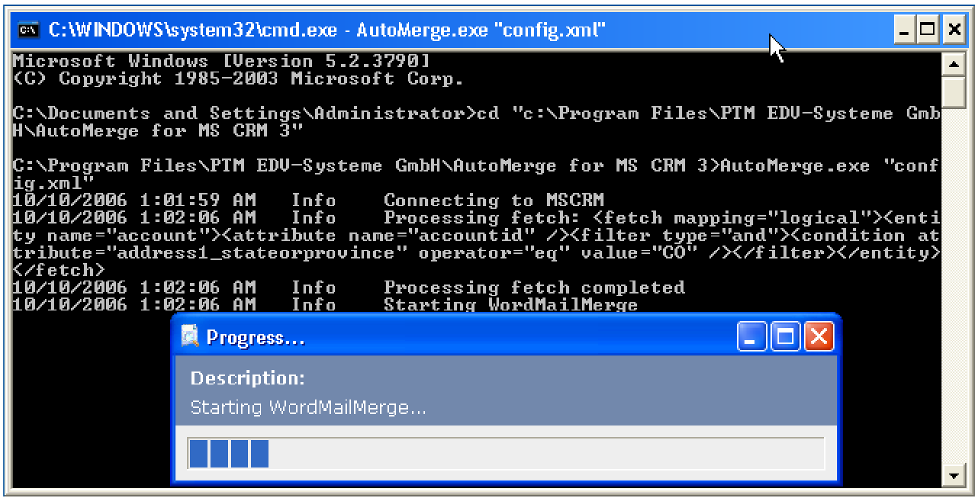
4. Start AutoMerge
   Now you can start AutoMerge by specifying the path to the XML configuration file as input parameter. In the following example, the configuration file is named "config.xml" and is in the installation directory of AutoMerge. If the configuration file is stored on another directory than the installation directory, you must specify the whole path to it.

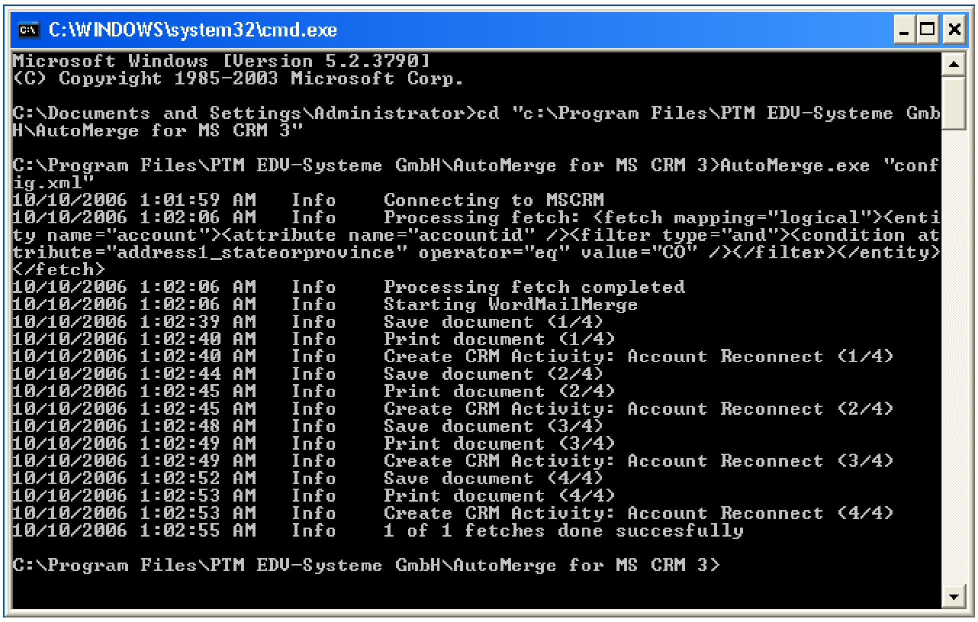


   If the path or the configuration filename contains spaces, you have to enclosure it within double quotes. The following example demonstrates it.



5. Now press enter to start AutoMerge. You should see a similar protocol like this if you turn on log to console.





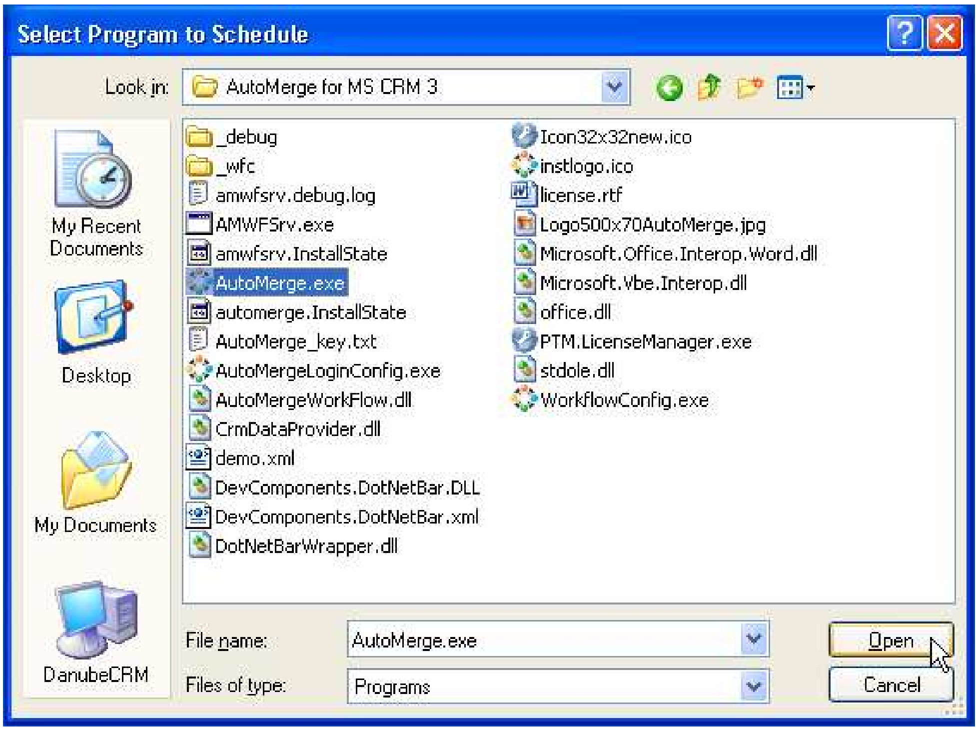
5 Create Scheduled Task for AutoMerge – Step-by-Step

1. Go to “Scheduled Tasks” on the “Control Panel” and click “Add Scheduled Task”.

2. The “Scheduled Task Wizard” dialog appears. Click “Next” to continue.

3. Click on "Browse"

4. Go to the AutoMerge for MS CRM 3 installation directory. Typically "C:\Program Files\PTM EDV-Systeme GmbH\AutoMerge for MS CRM 3" and select "AutoMerge.exe". Click "Open" to proceed.



5. Select a name for the Scheduled Task and select one of the following options: “Daily”, “Weekly”, “Monthly”, “One time only”, “When my computer starts” or “When I log on”. Click “Next” to proceed.

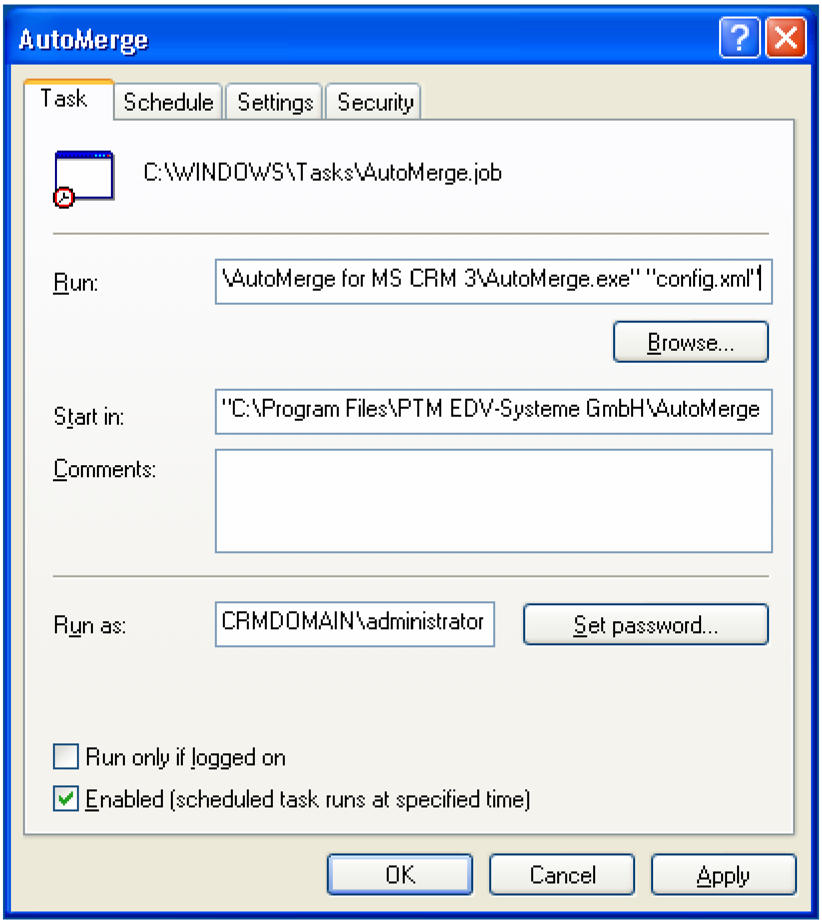
6. Configure the Scheduled Task as you like and click “Next”.

7. Enter your login credentials and click “Next”.

8. You’ll see a summary of the new created Scheduled Task. Activate the checkbox “Open advanced properties for this task when I click Finish” and then click “Finish”.

9. Advanced Properties

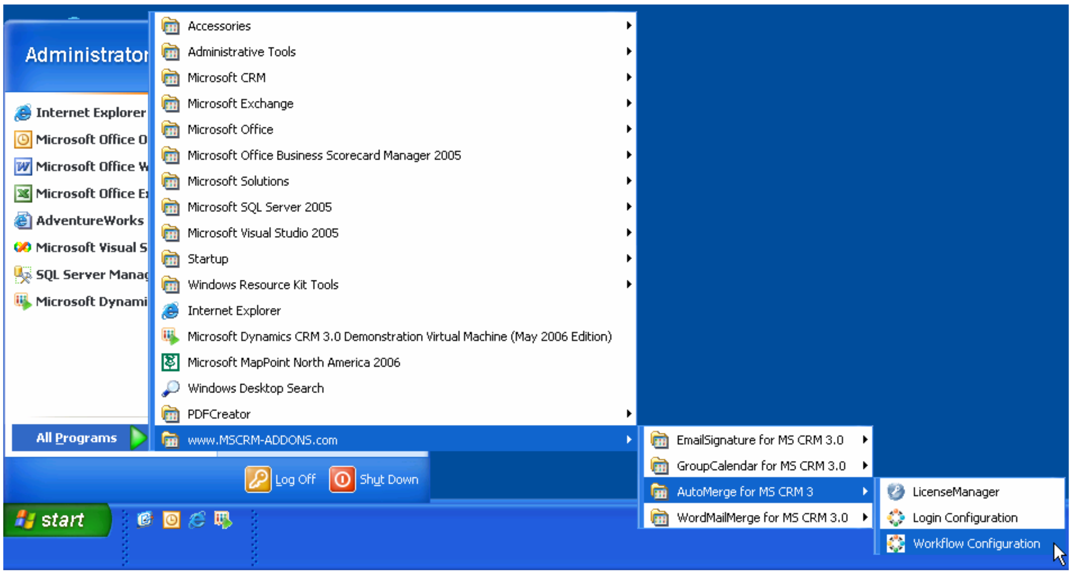
Go to the "Run"-textbox and append as parameter the path and name of the XML configuration file. If a configuration file named "config.xml" is in the installation directory, the following line should be in the "Run"-textbox: "C:\Program Files\PTM EDV-Systeme GmbH\AutoMerge for MS CRM 3\AutoMerge.exe" "config.xml"



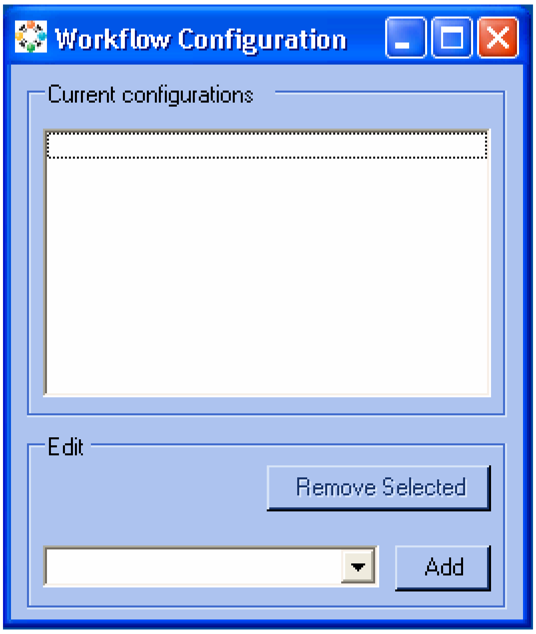
Change the other settings as you wish and click "OK" to save the Scheduled Task.

6 Create Workflow for AutoMerge – Step-by-Step

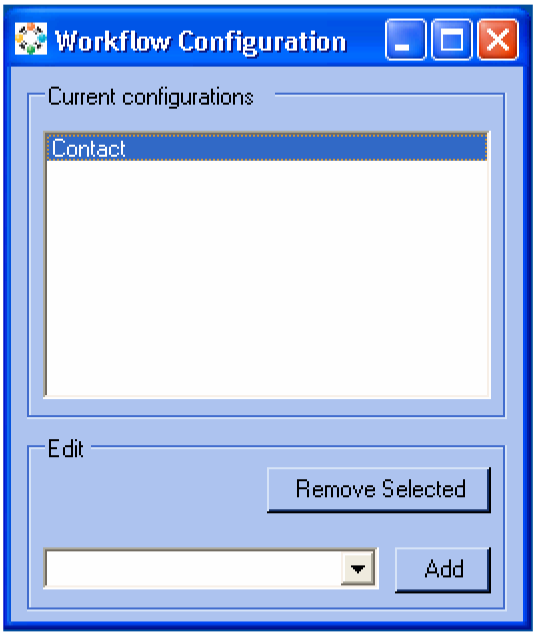
1. First you must start the Workflow Configuration Tool of AutoMerge. This tool will write the specific configuration in the workflow.config file of MS CRM. The tool is located in the start menu under "All Programs\www.MSCRM-ADDONS.com\AutoMerge for MS CRM 3\Workflow Configuration"



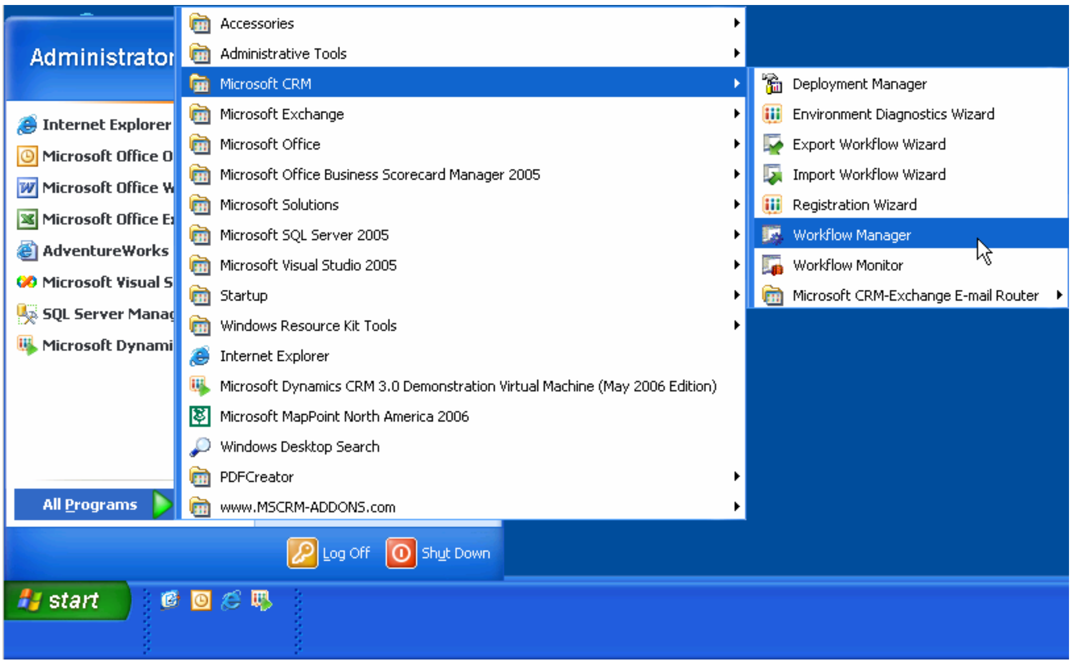
2. Under "Edit" you must select the entity for which you want to create a workflow and then click on "Add".
   Important note: After clicking "Add" the workflow service of the MS CRM Server and the IIS will be restarted.



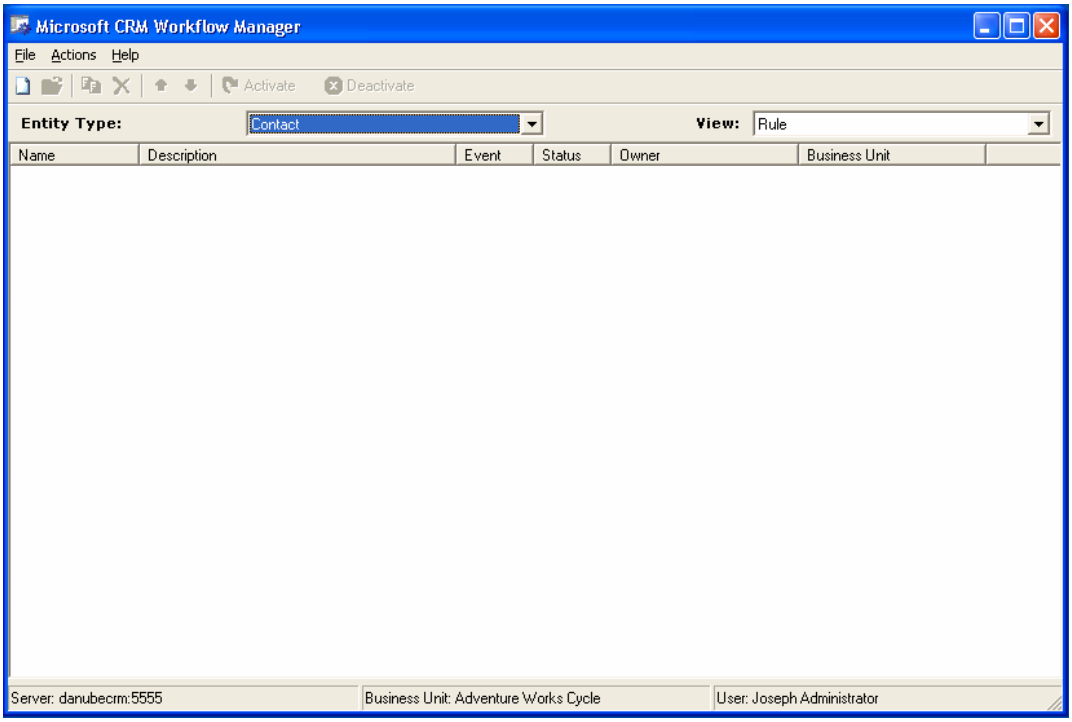
The new configuration is now saved to the workflow.config file of MS CRM. In this example for the entity "Contact".



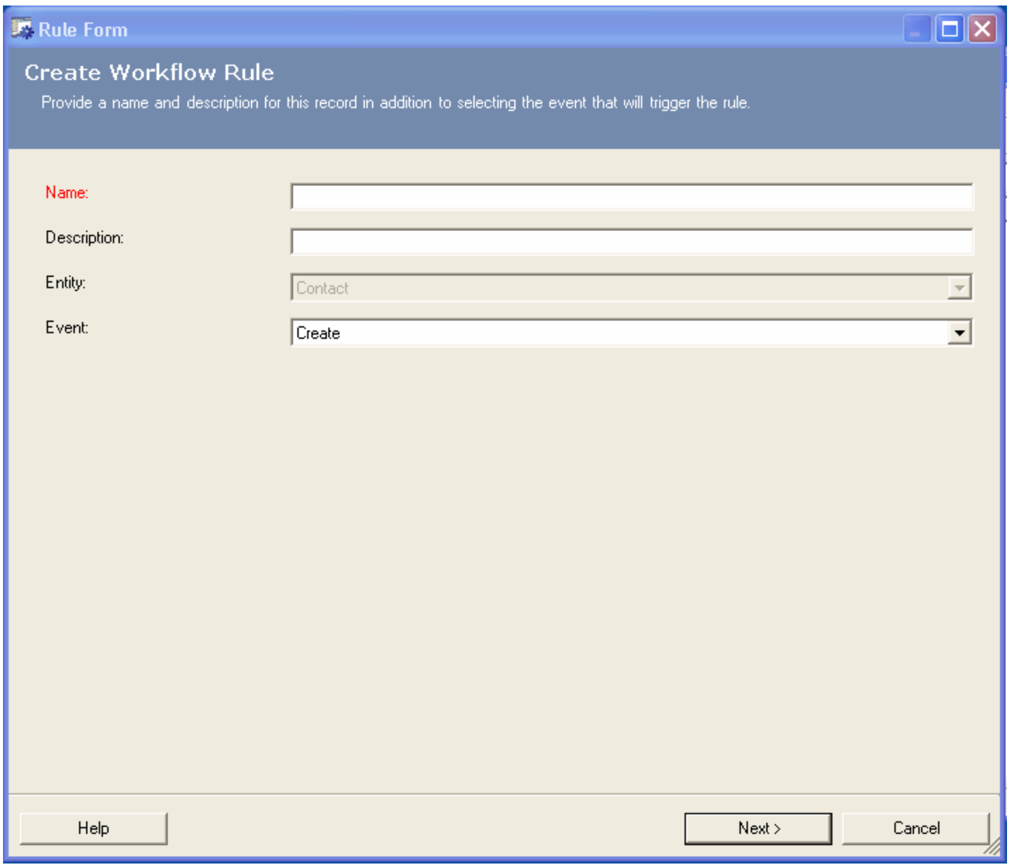
3. Now you're ready to configure the workflow. To do this, start the Workflow Manager of MS CRM. Found in the start menu under "All Programs\Microsoft CRM\Workflow Manager".



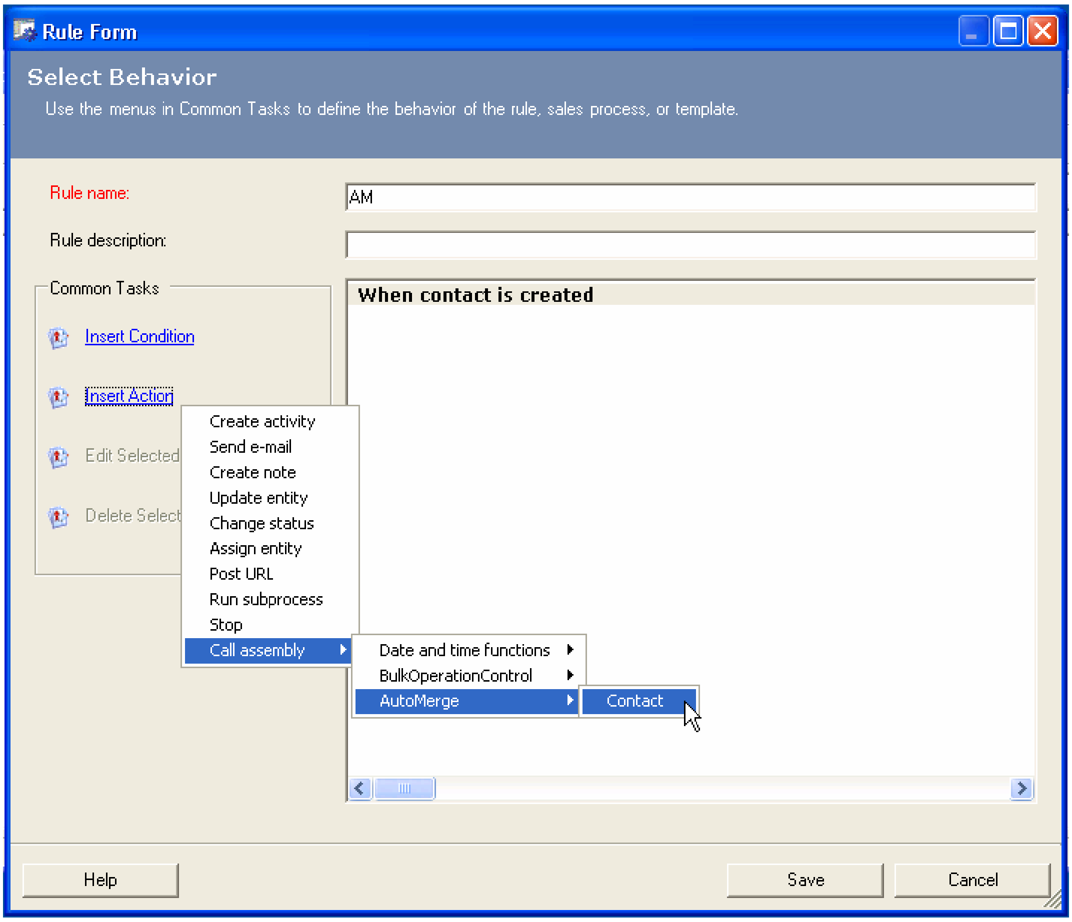
4. There you must select the Entity Type for which you want to create a workflow. For this example select "Contact". And then create a new workflow "File -> New"



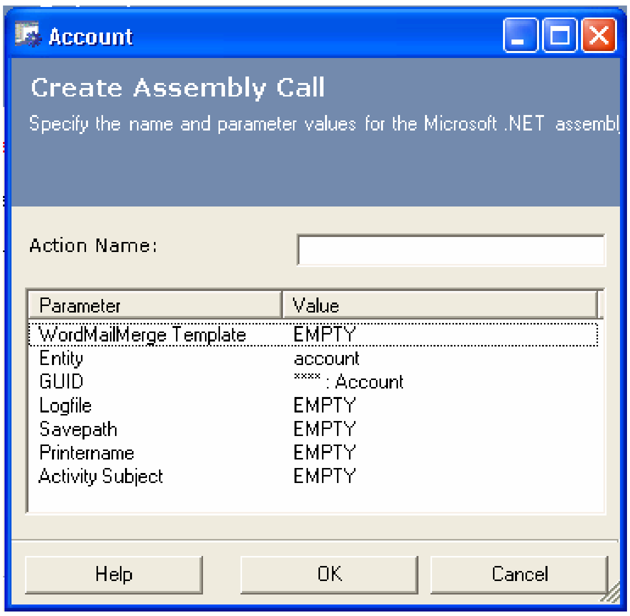
5. Type a name for the workflow, a optional description and the event for which the workflow should be executed (manual, assign, create or change status)



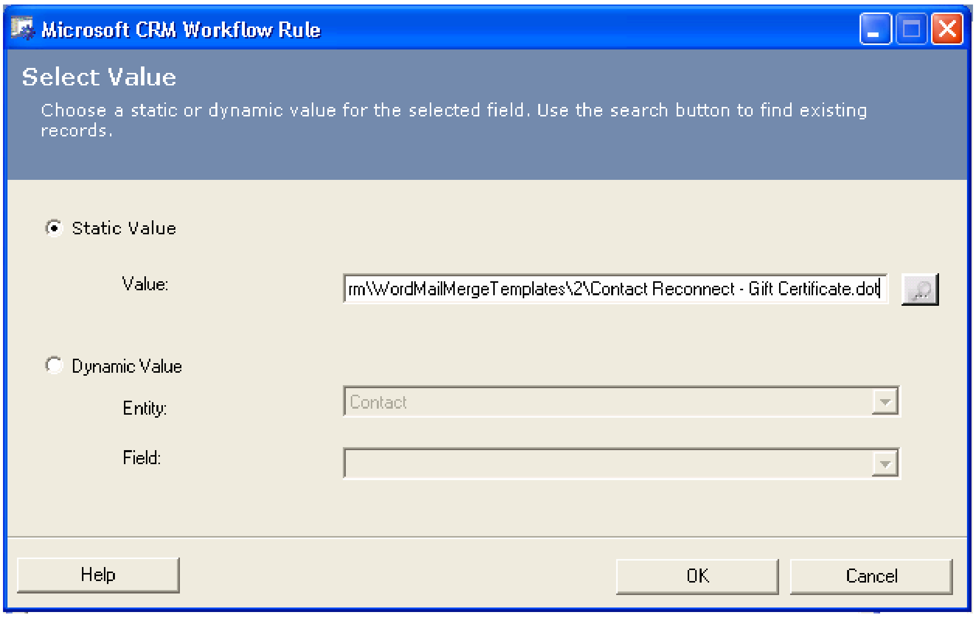
6. Then you must configure your workflow conditions as you like. To start AutoMerge select "Insert Action -> Call assembly -> AutoMerge -> [ENTITY]". [ENTITY] stands for the entity for which the workflow will be created. In this example you must select "Contact".



7. A new dialog appears in which you must enter the specific options for AutoMerge. First of all you must enter an "Action Name" for the assembly call.

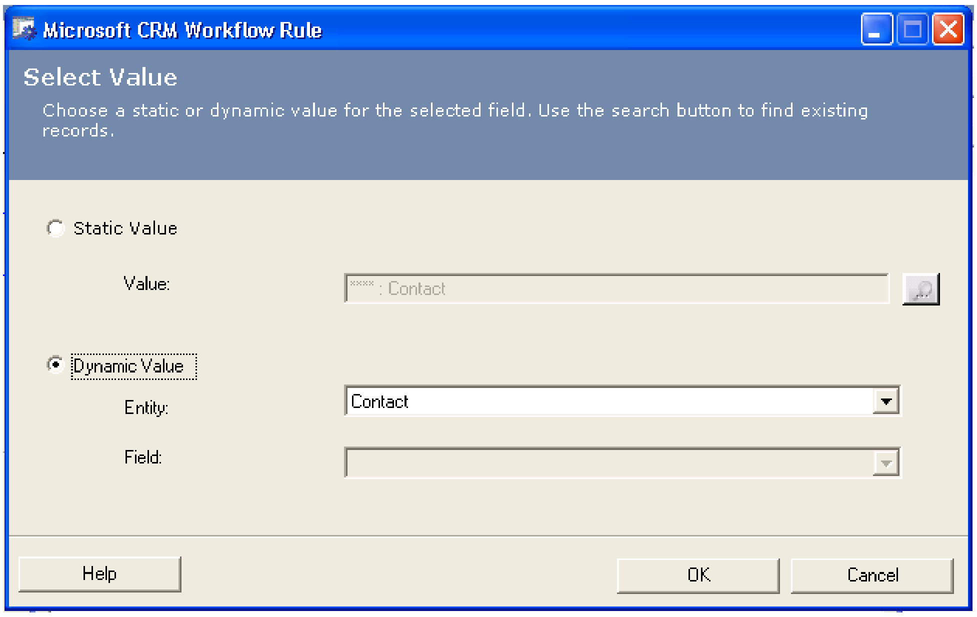


8. After that you must specify the options for AutoMerge
    a. *WordMailMerge* Template
       Ensure that this template is for the right entity. You have to type the full path of the template. You could also type more templates separated by ";".
       Double-click on the "WordMailMerge Template" and a new dialog appears. There you must select "Static Value" and enter your template(s). Click "OK" to continue.



    b. *Entity*
       This should be left with the default value

    c. *GUID*
       You must double-click on this, set to "Dynamic Value" and click "OK" to proceed.



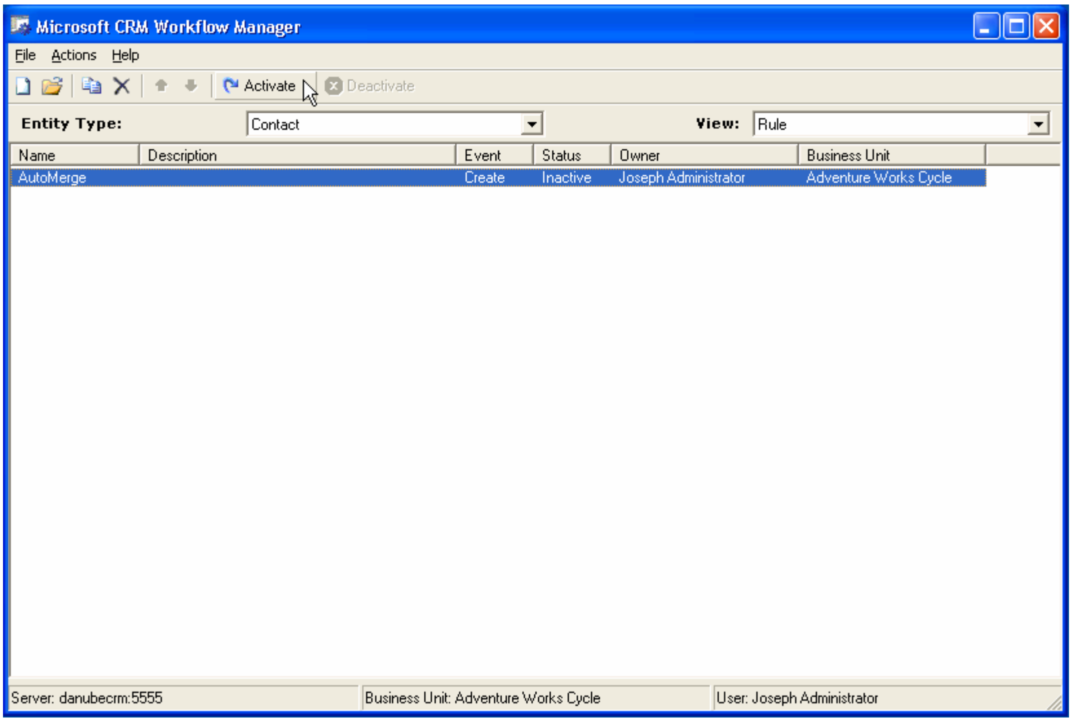
d. *Logfile*
This value is optional. Select "Static Value" and specify here the logfile where the log should be saved. If you leave this value by default "EMPTY" the log will not be saved.

e. *Savepath*
This value is optional. Select "Static Value" and specify where the documents should be saved. If you leave this value by default "EMPTY" the files will not be saved.

f. *Printername*
This value is optional. Select "Static Value" and specify the name of the printer on which the documents should be printed. If you leave this value by default "EMPTY" the documents will not be printed.

g. *Activity Subject*
This value is optional. Select "Static Value" and specify the subject of the CRM Activity. If you leave this value by default "EMPTY" no letter activities will be created.

9. Then you must activate the new created workflow rule
   Select the workflow rule and click on the toolbar on "Activate".



10. That's all to create a workflow rule with AutoMerge for MS CRM 3.

7 Contact

If you have problems with the product send a Email to support@mscrm-addons.com or call +43 316 680 880 0