DocumentsCorePack Print Application for Microsoft Dynamics 365

July 2020

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

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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   Installation of DCPPrintService

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.

1.1   Installation

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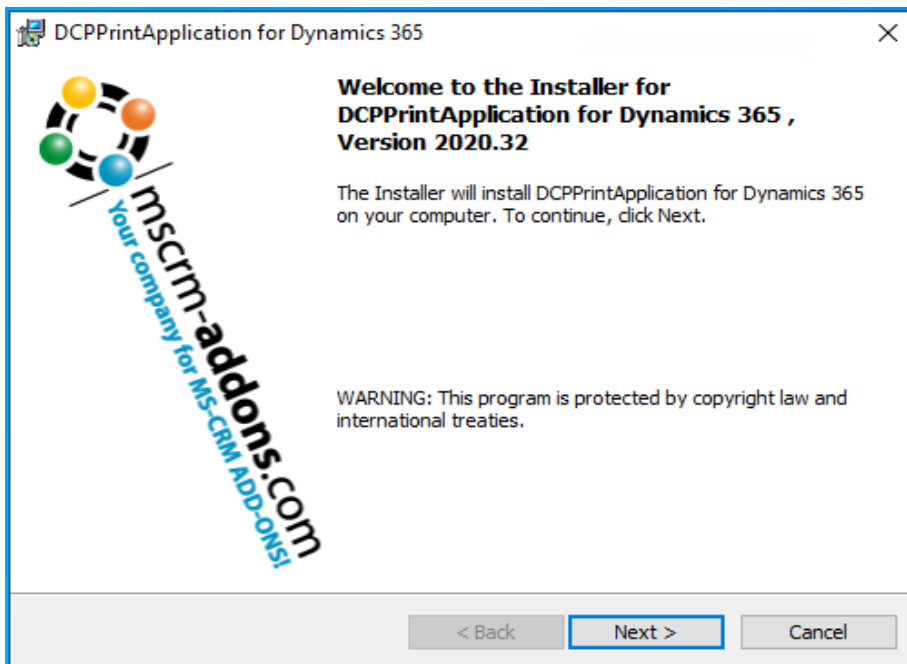Hit the *[Next >]*-button to continue with the license agreement.

Figure 1: Installer DCPPrintService for Dynamics 365

1.2   End User License Agreement (EULA)

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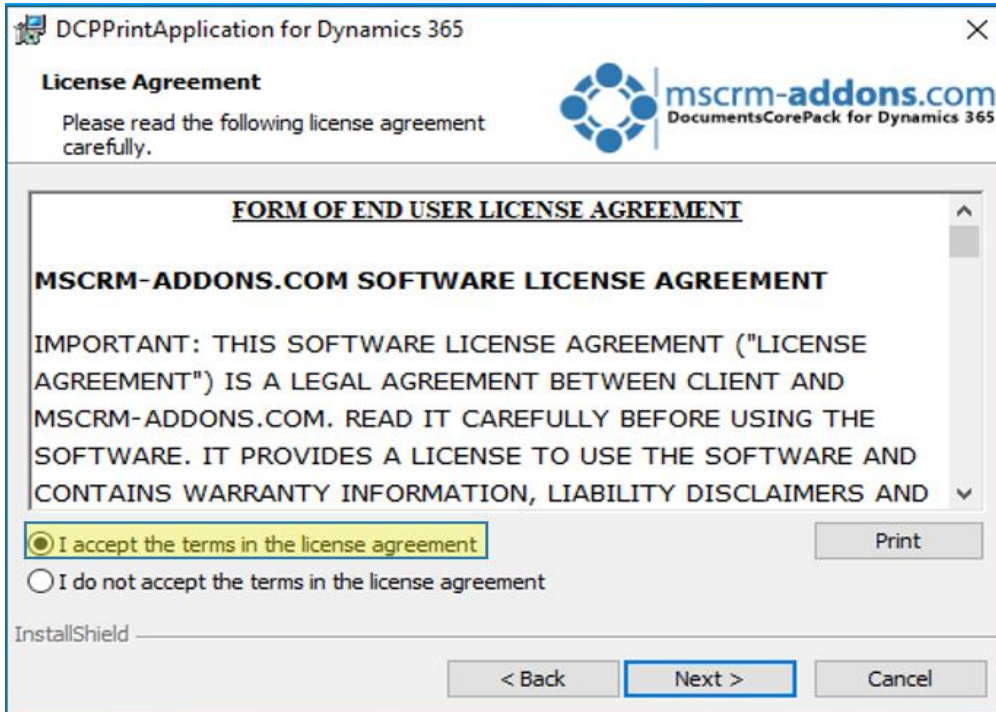

Figure 2: End User License Agreement (EULA)

1.3   Change the installation folder

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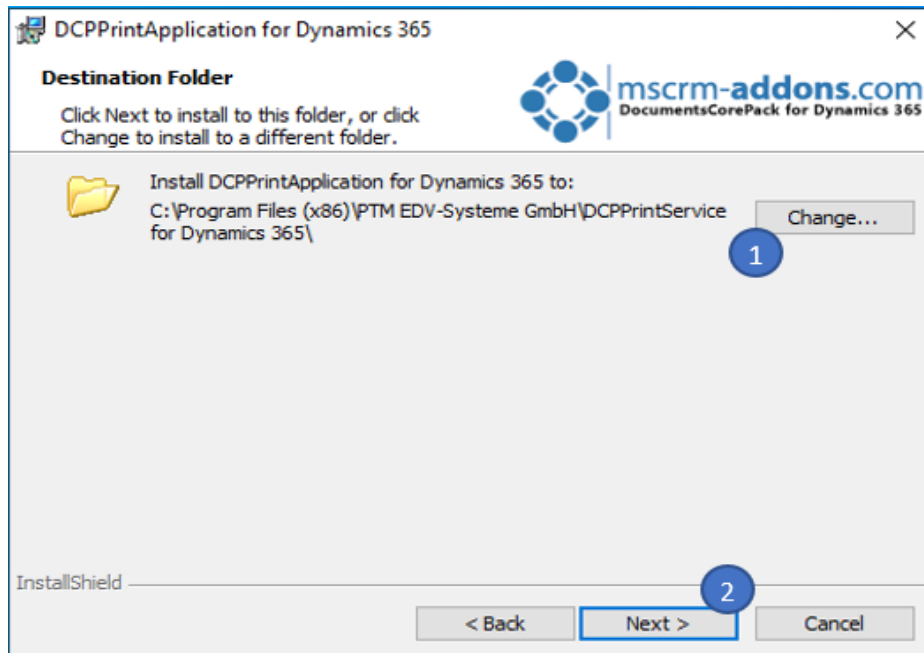

Figure 3: Change installation folder

1.4   Confirm the installation

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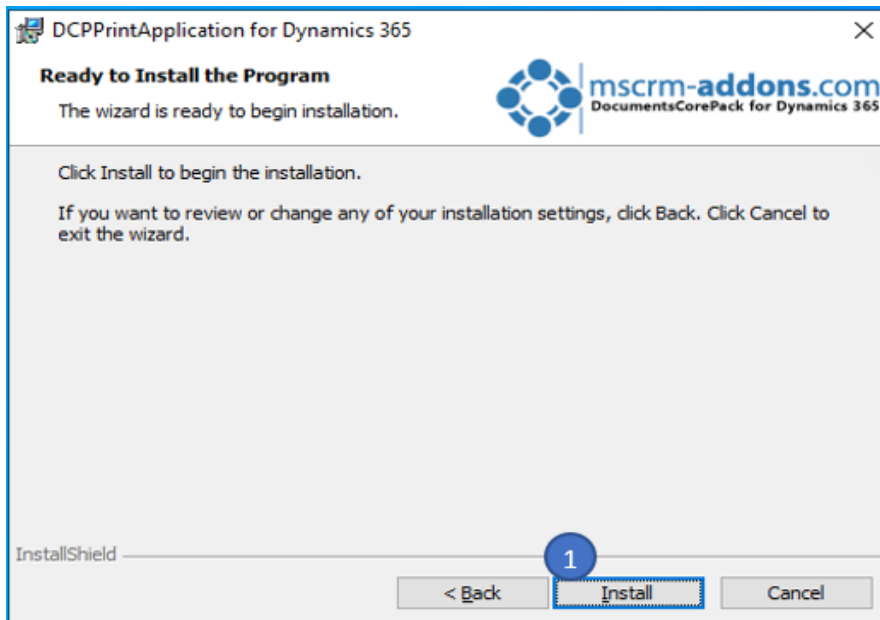

Figure 4: Confirm the installation

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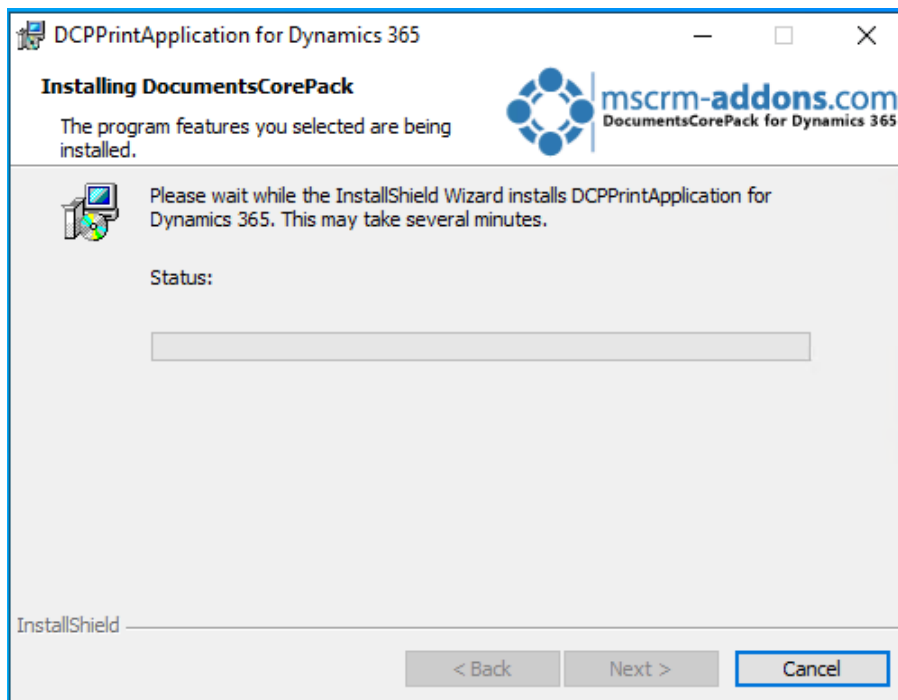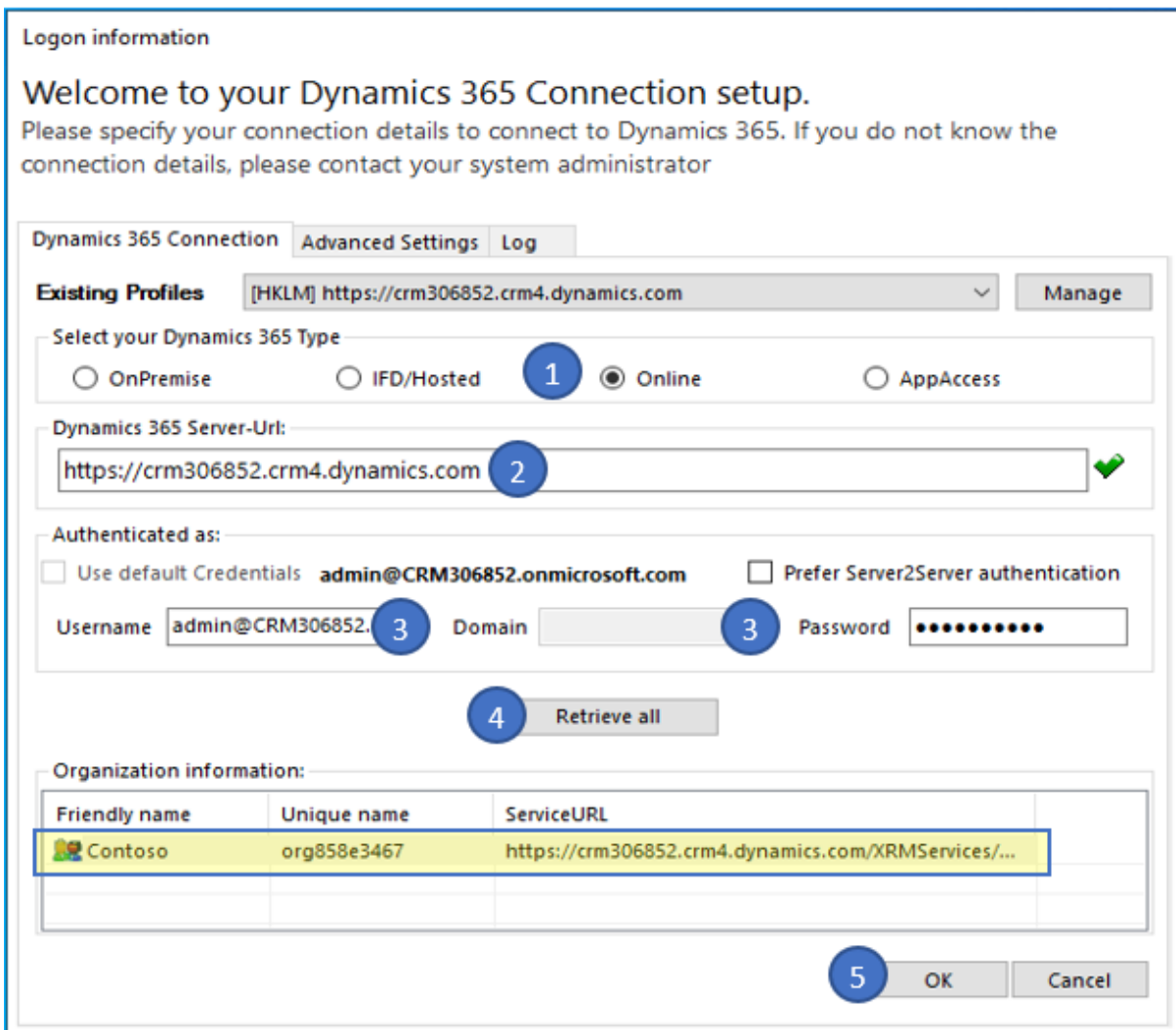

Figure 5: Installation statuConnect to Dynamics 365

1.5   Connect to Dynamics 365

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

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

Figure 6: Dynamics 365 Connection setup

1.6   Finish the installation

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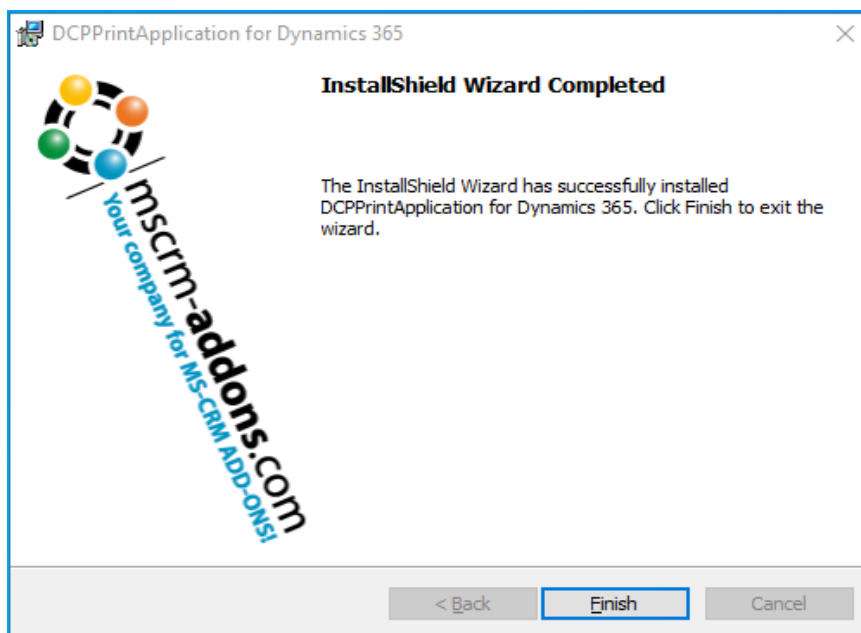

Figure 7: Finish installation

2 DCPPrintService Configuration

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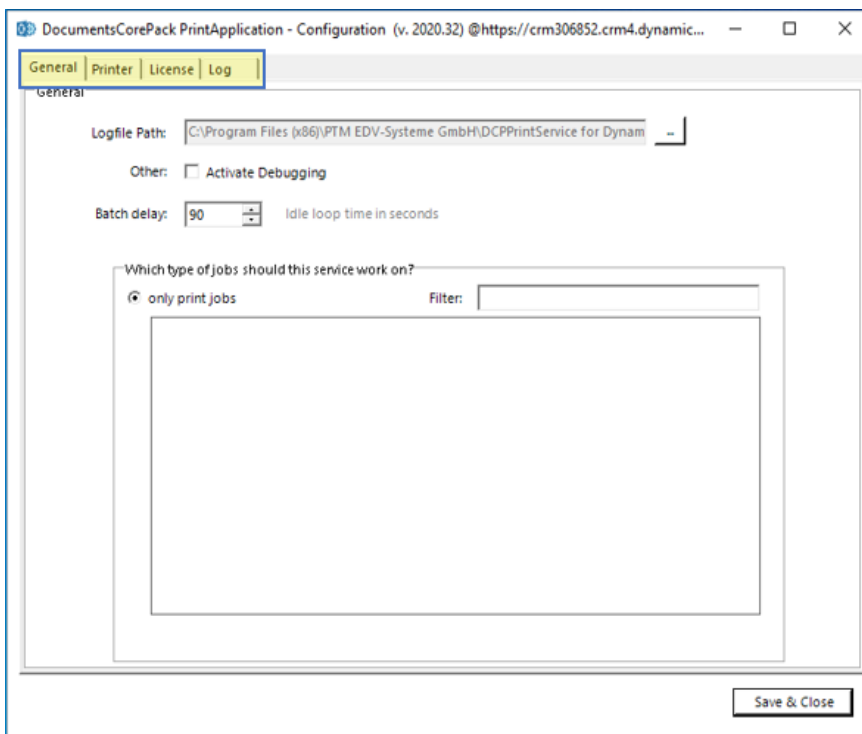

Figure 8: DCPPrintService Overview-tabs

2.1 The General-tab

The *General-tab* provides you with the opportunity to set the general settings of your future service (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 service checking for new print jobs).

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

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.
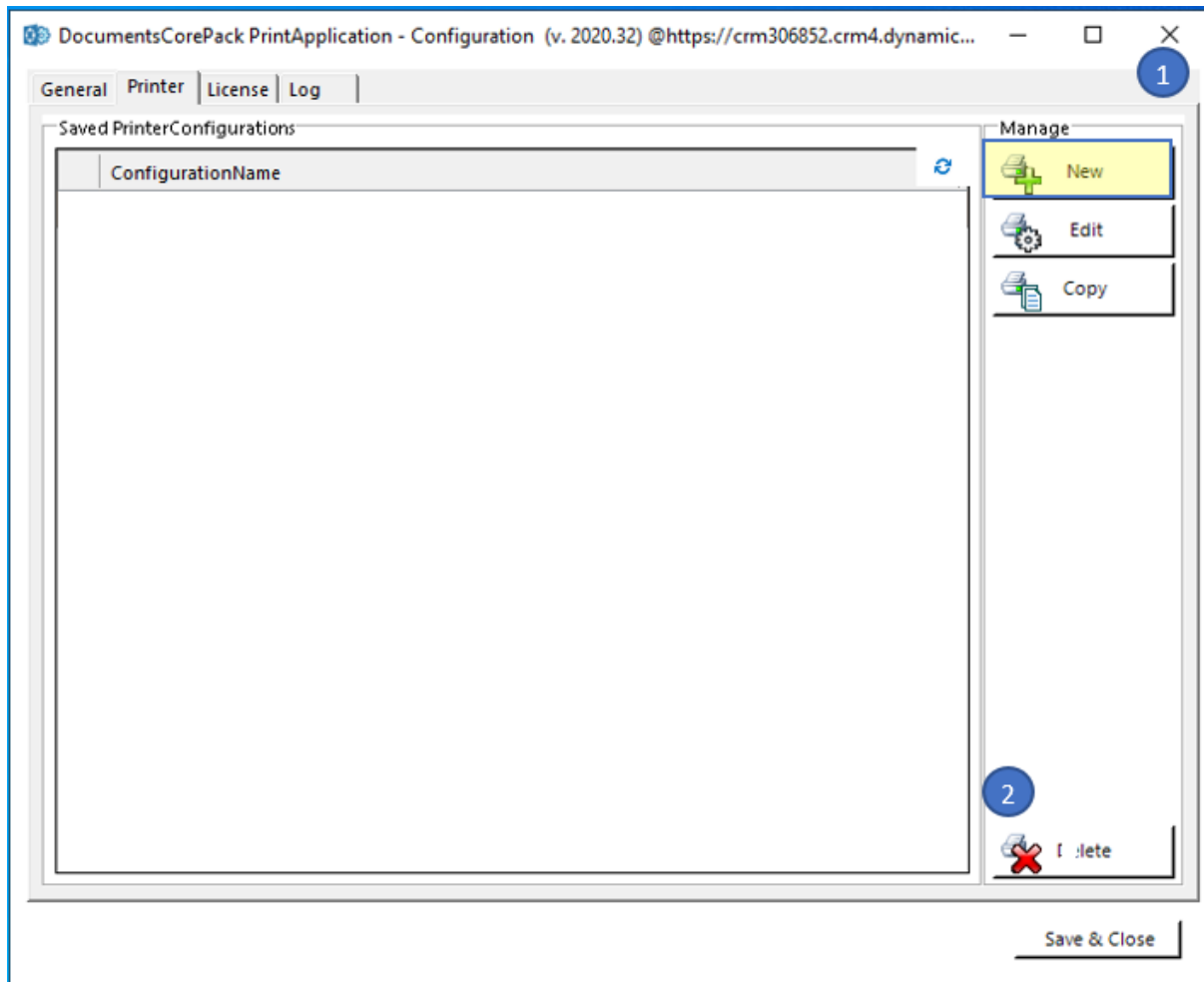

Figure 9: DCPPrintService Printer-tab

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:

❶ 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 service is running)

❷ Select the printer from the drop-down menu. You can only use the printer created with your user and your machine.

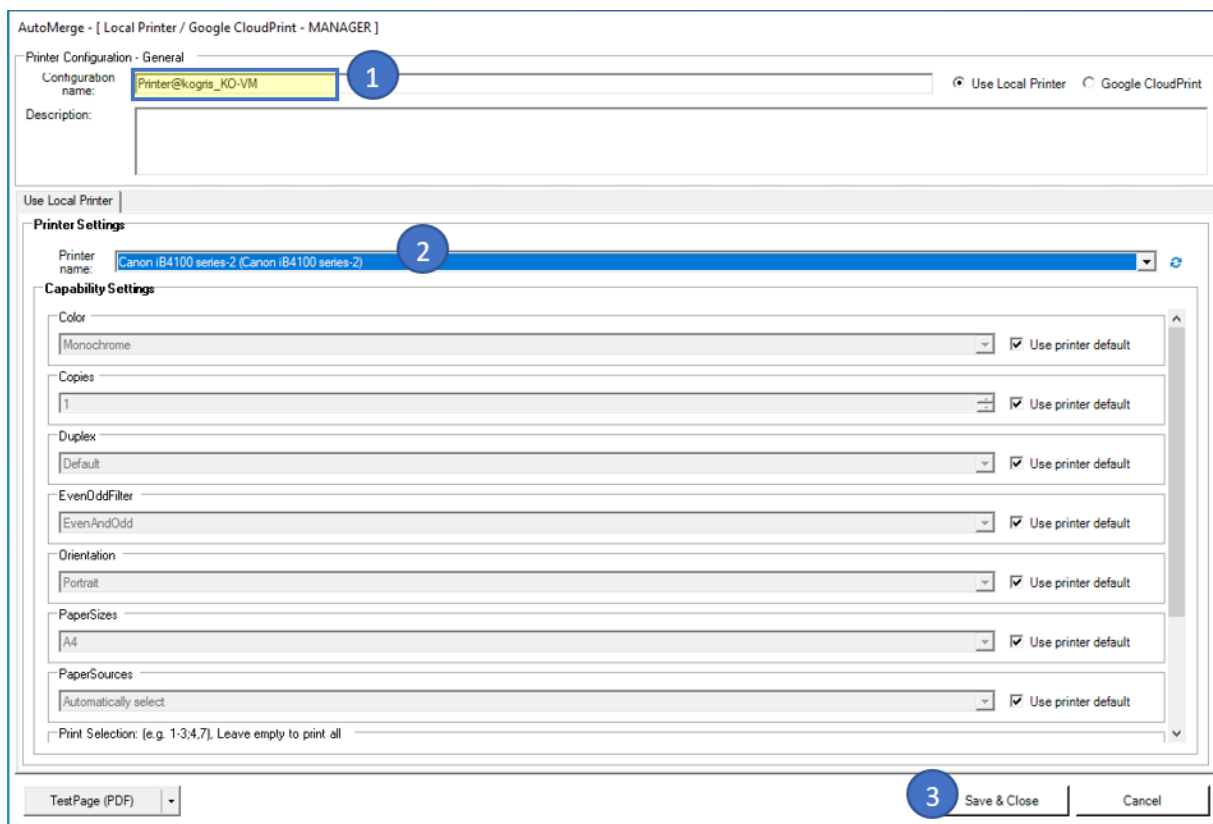❸ Hit the *[Save & Close]*-button.

Figure 10: Configure a printer

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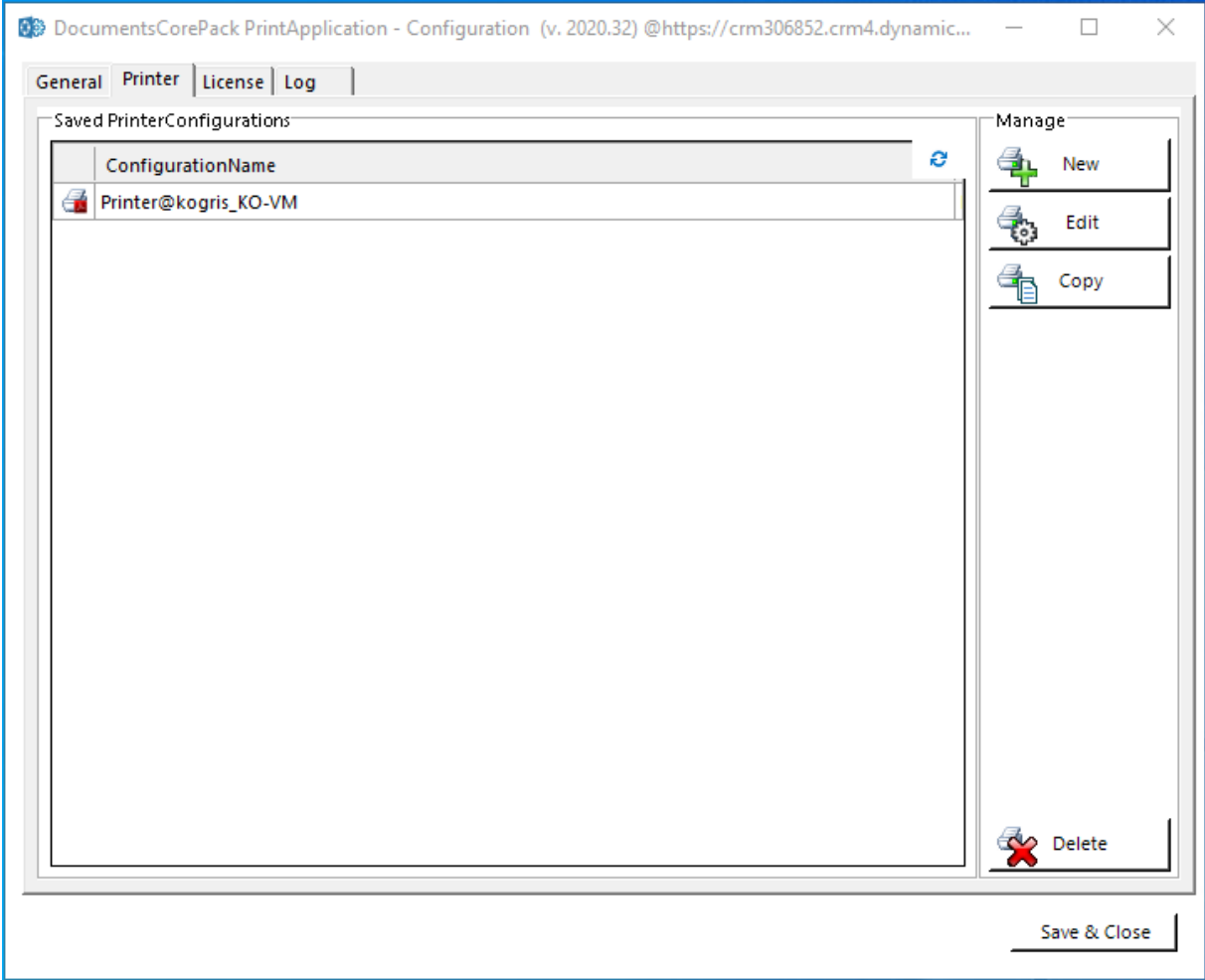

Figure 11: DCPPrintService Printer-tab: Configured printer

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.
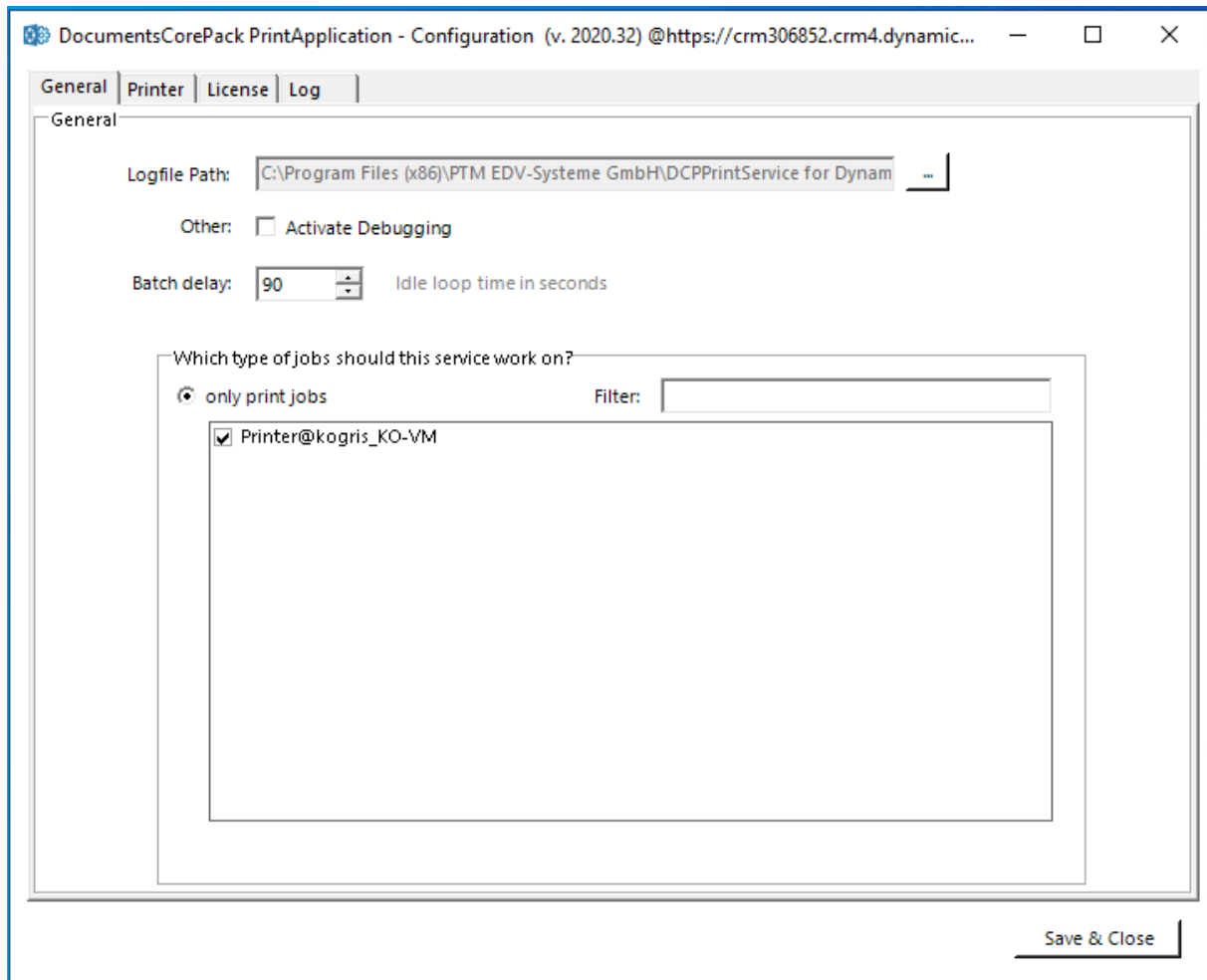

Figure 12: DCPPrintService General-tab/ Configured printer

2.3   The License-tab

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

2.4   The Log-tab

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

That's it!

Hit the **[Save & Close]**-button in order to finish the DCPPrintService configuration. You will now find the DCPPrintService 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 service or quit it.

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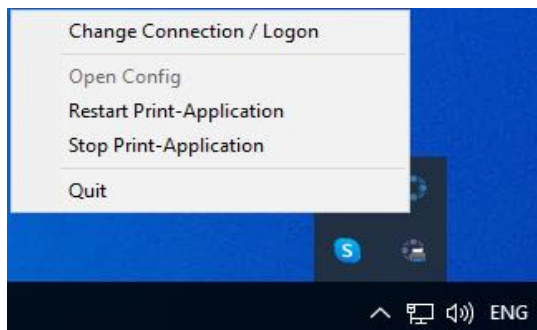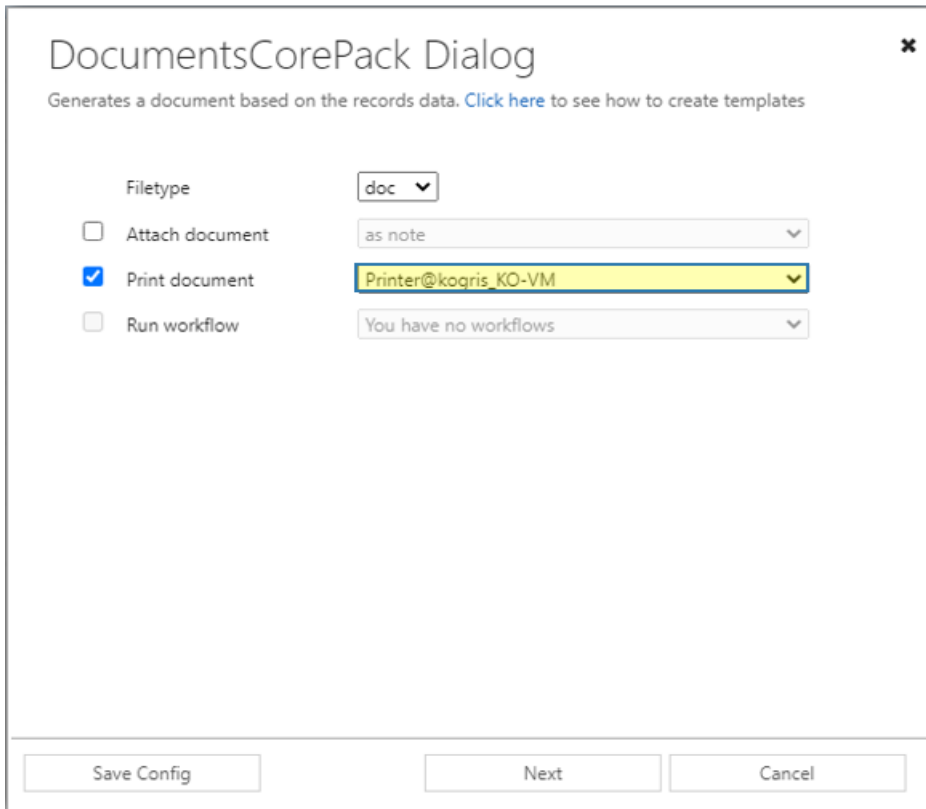

Figure 13: DCPPrintService in the Task Pane

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 14: DocumentsCorePack Dialog – Print

3   List of figures

4 Contact

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

For sales and licensing questions please contact office@mscrm-addons.com or the corresponding contact information below.

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