Documents Core Pack for MS CRM 2011

Version 5.0

Users Guide
(Use of Documents Core Pack for MS CRM 2011)

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1 Users Guide

1.1 Intro

Documents Core Pack provides the possibility to create and manage documents associated with CRM – records in a comfortable and structured way. Additional utilities simplify and improve the use of MS CRM and optimize business processes like sending quotes or invoices.

Main Features:

- **WordMailMerge**
  enables creation of Word-Documents with data from MS CRM. It's capable to resolve any relations and works with custom entities as well as with standard CRM entities. Therefore Documents Core Pack provides the opportunity to e.g create quotes, Invoices including data from related records like "other contacts", accounts, products etc,…

- **Activity Creation**
  With the possibility to create Letter/Email/or Fax activities the generated content can be stored back to the regarding CRM record.

- **Send as PDF**
  Created documents can be send to customers as PDF files. It converts the generated documents and therefore Documents Core Pack provides a powerful option to simplify accounting by handling invoices, quotes, oders.….
  Since Version 5.27 also other file types can be send.

- **Document Management**
  With the possibility to link DCP with the CRM-Sharepoint-integration, it allows to store generated documents in a structured way.
  Documents related to a record (e.g. account or contact) can be accessed via the "Documents" setting in the CRM navigation menu.

  - ***External Sharepoint Integration***
    Next to the CRM-internal Sharepoint integration, which is available for MS CRM online too, it is possible to use any other Sharepoint-Service to store documents.
  - ***Microsoft Windows Explorer Integration***
    The sharepoint functionality is also available for the Windows explorer. This allows to get a structured file system of documents associated with CRM without the need to use Sharepoint services.

- **Document Summary**
  The Document Summary is a tool to show you all documents and records (Cases, qutoes, invoices,..) related to a specific record. E.g. Users can open an account and get an overview of all documents of this account and of all related records.

This documentation aims to describe the main settings, including step-by-step descriptions about how to use all benefits provided by DCP.

2 Documents Core Pack-Templates

Documents Core Pack – Templates include predefined fields, so-called mail merge fields. These are references to attributes in the CRM-System (Name of Company, Address, Primary Contact, Mobile phone number…).

It is possible to create templates for each MS CRM – Entity (Contacts, Companies…).
The created templates can then be used to by each user for generating documents.

Important basic and example templates are included in DocumentsCorePack install.

For example:

1. Marketinglisttemplates for multimails
2. Quote and Invoice templates

Basically there are two different types of templates (Standard and Office Open XML). The following comparison illustrates the main differences.

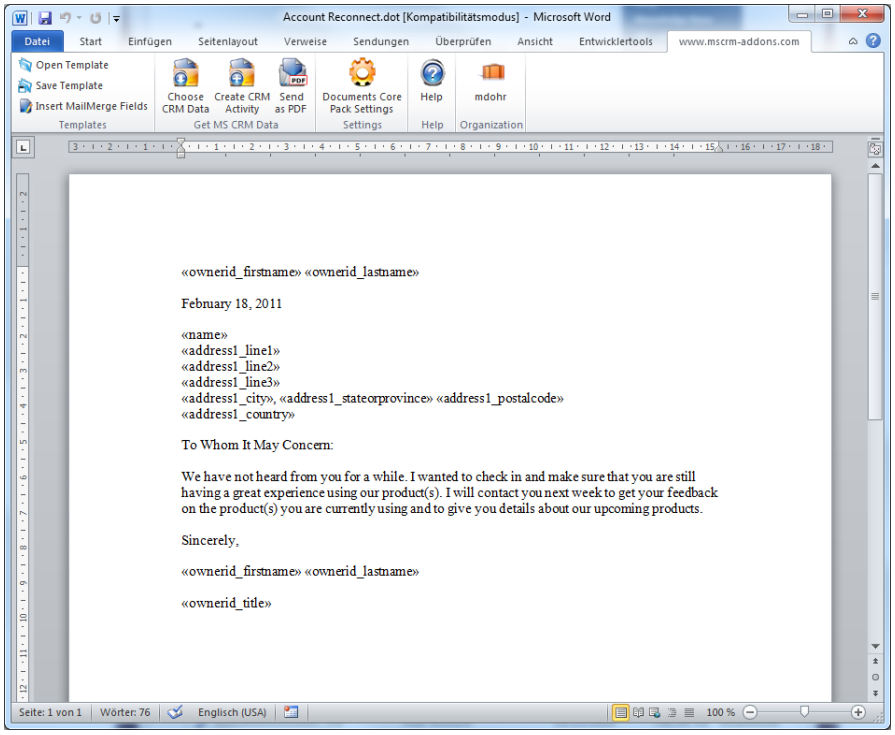
Standard:	**Office Open XML**
Advantages: • Use of the MS Word mailmerge-functionality • CRM-attributes are treated like standard MS Word mergefields. • All MS Word formatting options allowed Disadvantages: • Complex configuration of templates that should show a list of items (e.g. a quote including a table of quote-products) • Macros often required. (e.g grouping • Only one "One:Many"- relation can be dealt in a template.	Advantages: • CRM-attributes are handled by ContentControls • Automatic creation of line-item-lists. • No limitation on the number of "One:Many" - relations • No Macros required Disadvantages: • Template creation requires a higher amount of MS Word experience • The Automated Line-Item parts do not allow to use all MS Word-formatting options.

First we need to take a look on the creation of those templates.

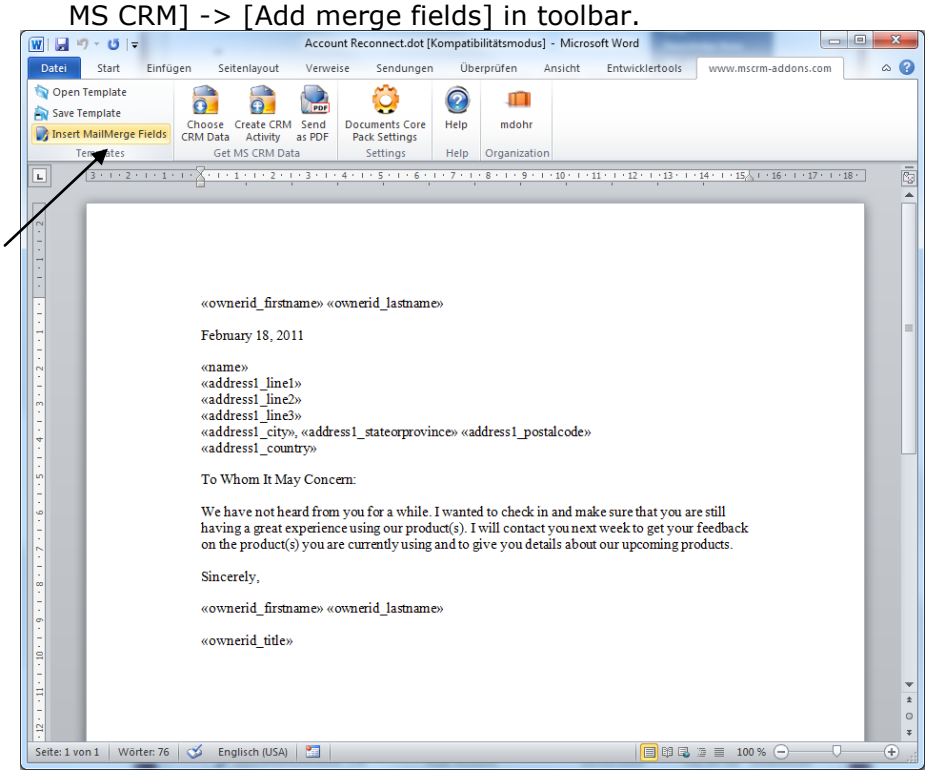
2.1 Creating Standard Templates

The following steps will show you how to create a DocumentsCorePack-Standard-template.

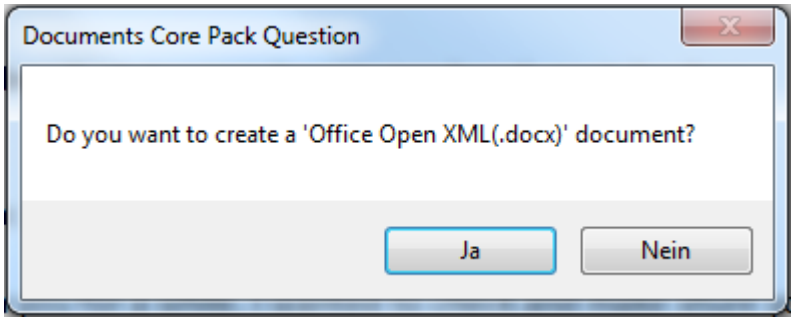
1. Start Microsoft Word.
2. Write or open a document with the required content.



3. We will add the MS CRM Fields now. To do this click [Documents Core Pack for MS CRM] -> [Add merge fields] in toolbar.

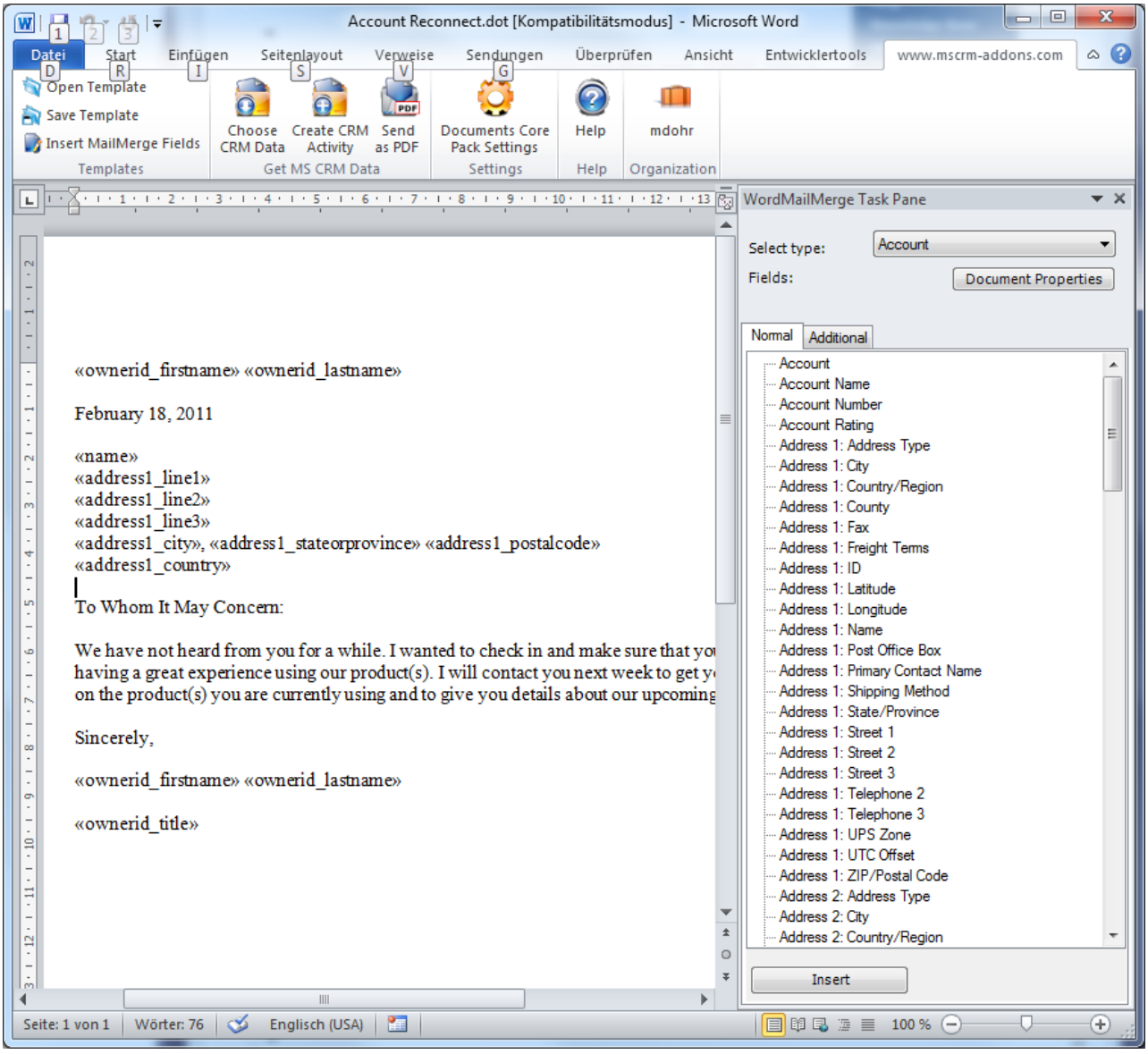


4. The following Message will appear:



Press [No] to proceed creating the standard template.

5. The following Taskbar will appear:



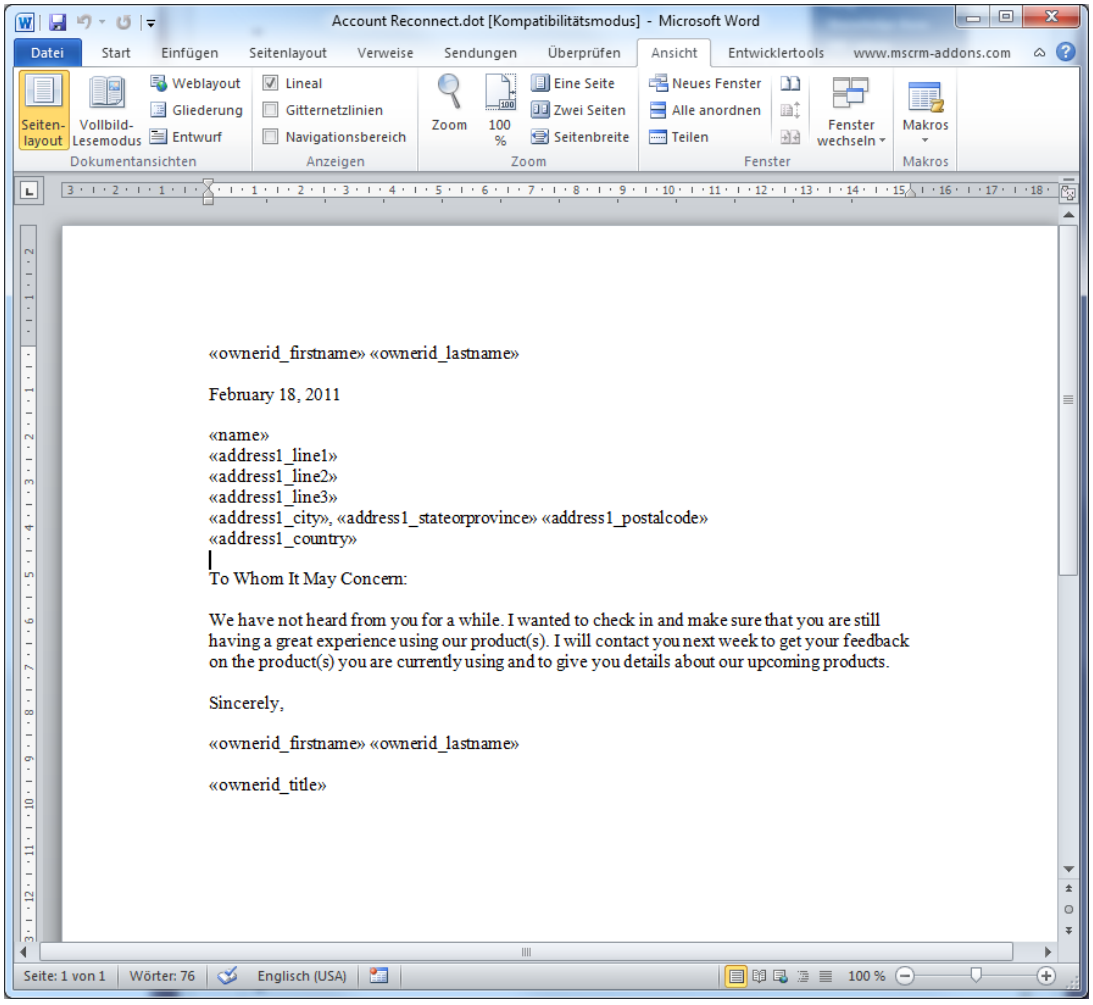
First choose the entity of the template you want to create [Select Type].

There are specific CRM-Attributes and different form letter-fields for each entity. If “Contact” is selected, CRM will only work with fields of the entity “Contact”.

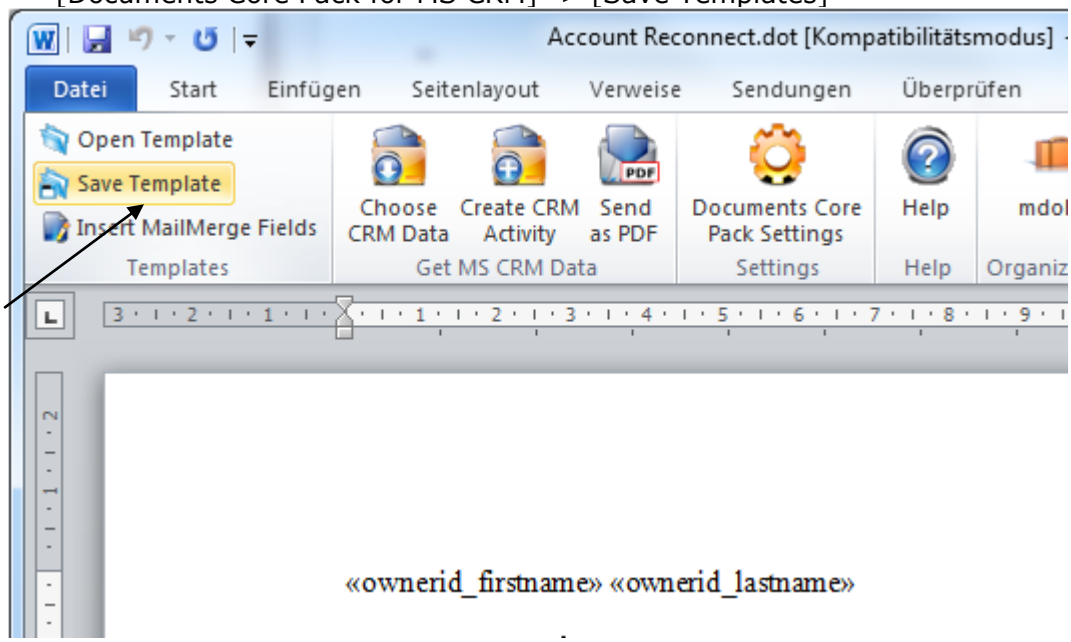
We have chosen “Contact” in our example.

With a double click on the various fields or by selecting specific fields and clicking on the button [Add] the selected fields are inserted into the template.

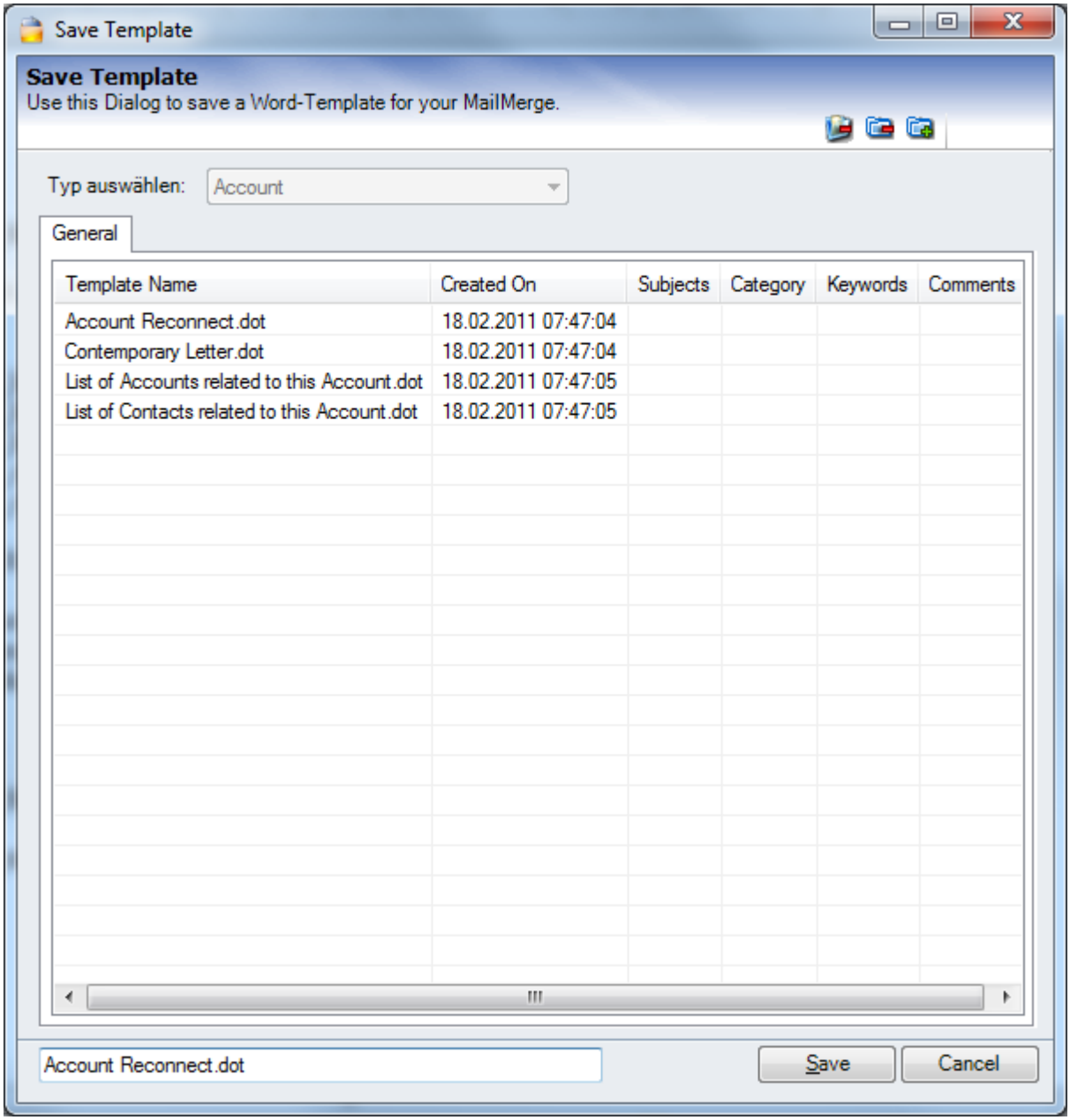
6. After adding some fields the Template will look like this:



7. Now save the Templates.
   [Documents Core Pack for MS CRM] -> [Save Templates]



8. The following dialog will appear:



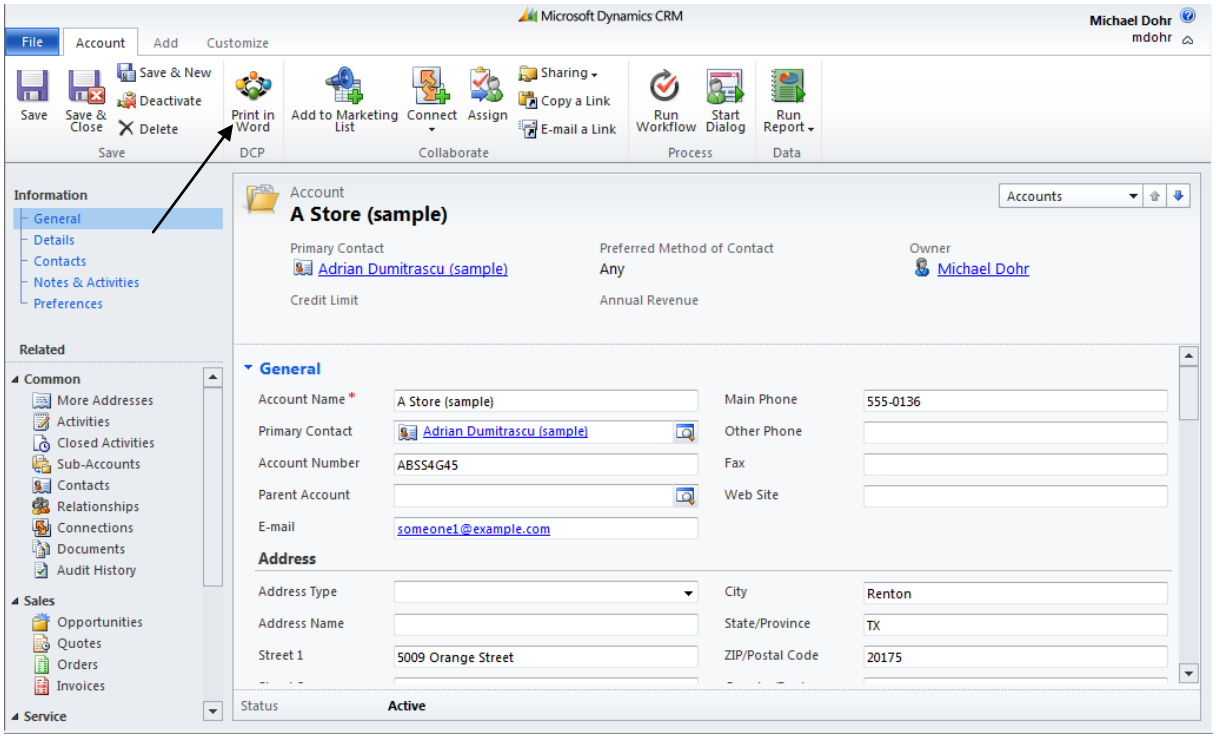
In this window you can name the template you created and decide in which category they should be stored.

If the template is stored under "My Templates", other user's access is denied.

In this dialog you are able to:

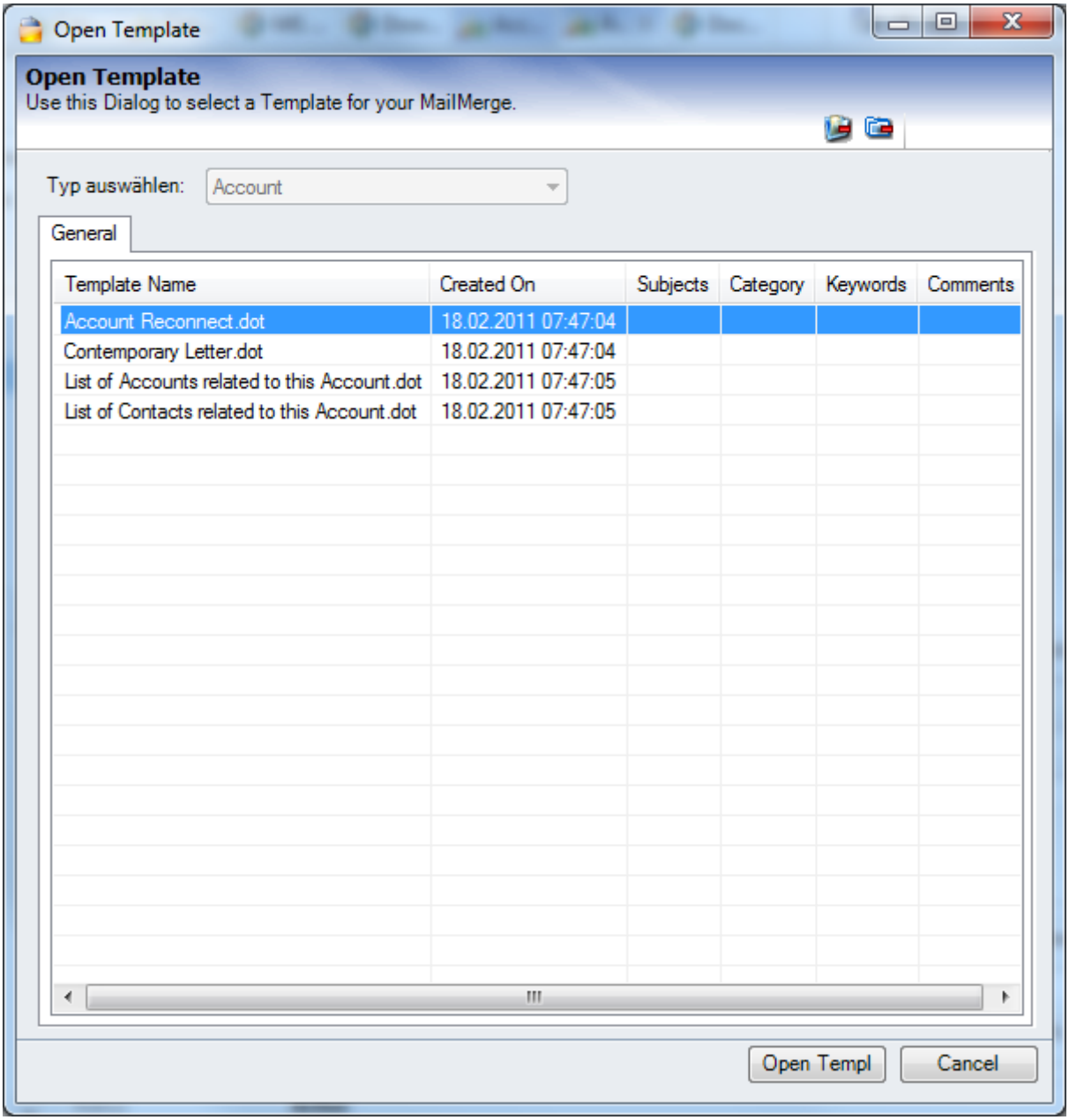
- Create new groups
- Update existing groups
- Delete Templates

The template is ready to be used. To run a first mailmerge we open the MS CRM Client and open an Account.



A merge can be started with a click on the "Print in Word" button at the top.

9. After clicking on[Print in Word], a new dialogue that allows us to choose the template we want to use appears.



10. Select your Template and click [OK]. You will see that the letter contains the wanted fields. The fields are filled with data from the selected contact.

11. In order to produce a letter-activity with the generated template and the content you wrote as a description, click the [CRM Activity]- button in MS Word.

    The content of the word file will be used automatically as description.

    More details will follow in the next chapter.

2.2 Creating templates using Office Open XML

The procedure of creating the template is nearly equal to those of Standard-templates (Chapter 2.1).

Office Open XML has been invented to enable creation of very complex templates that normally require the use of Macros.

This chapter contains a Step-by-Step description about how to create a Quote With grouping template. This means, that the qutoe-products are grouped by the value of a specific CRM-attribute (e.g subject), which is quite a common requirement.

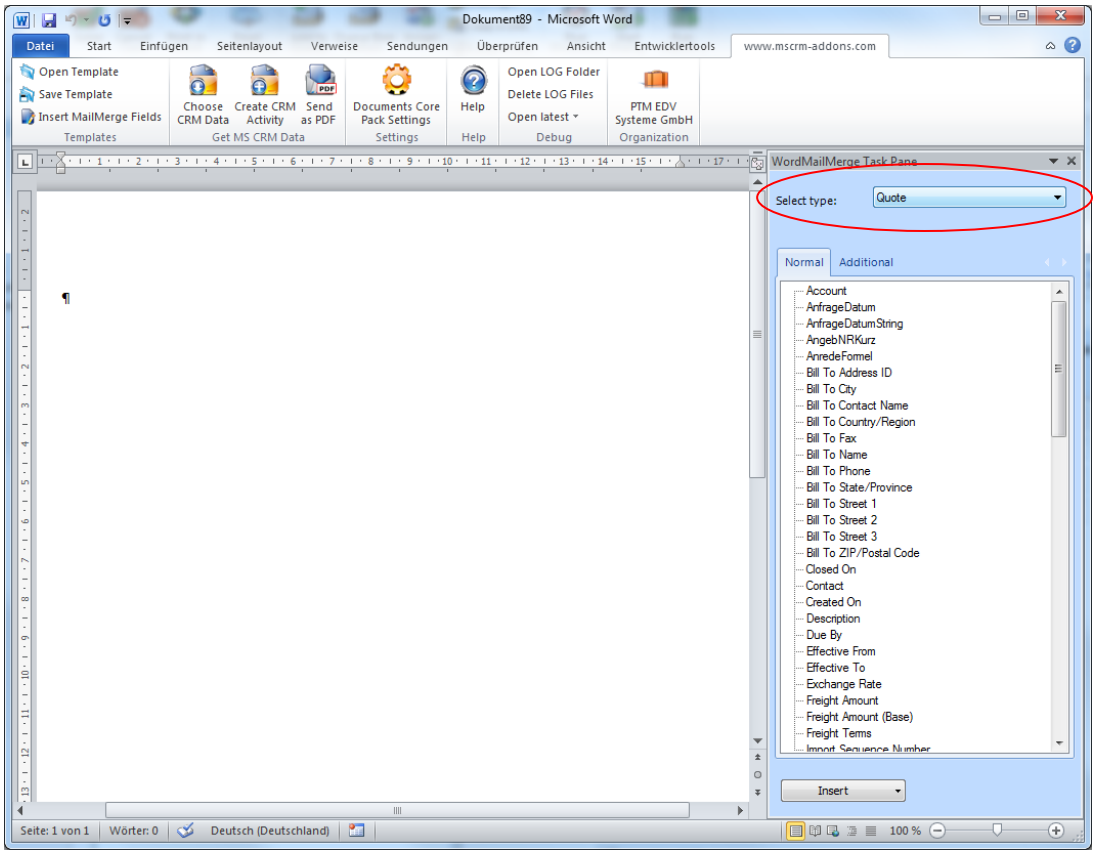
1. **Create template layout**

   First we need to create the basic layout of the template.

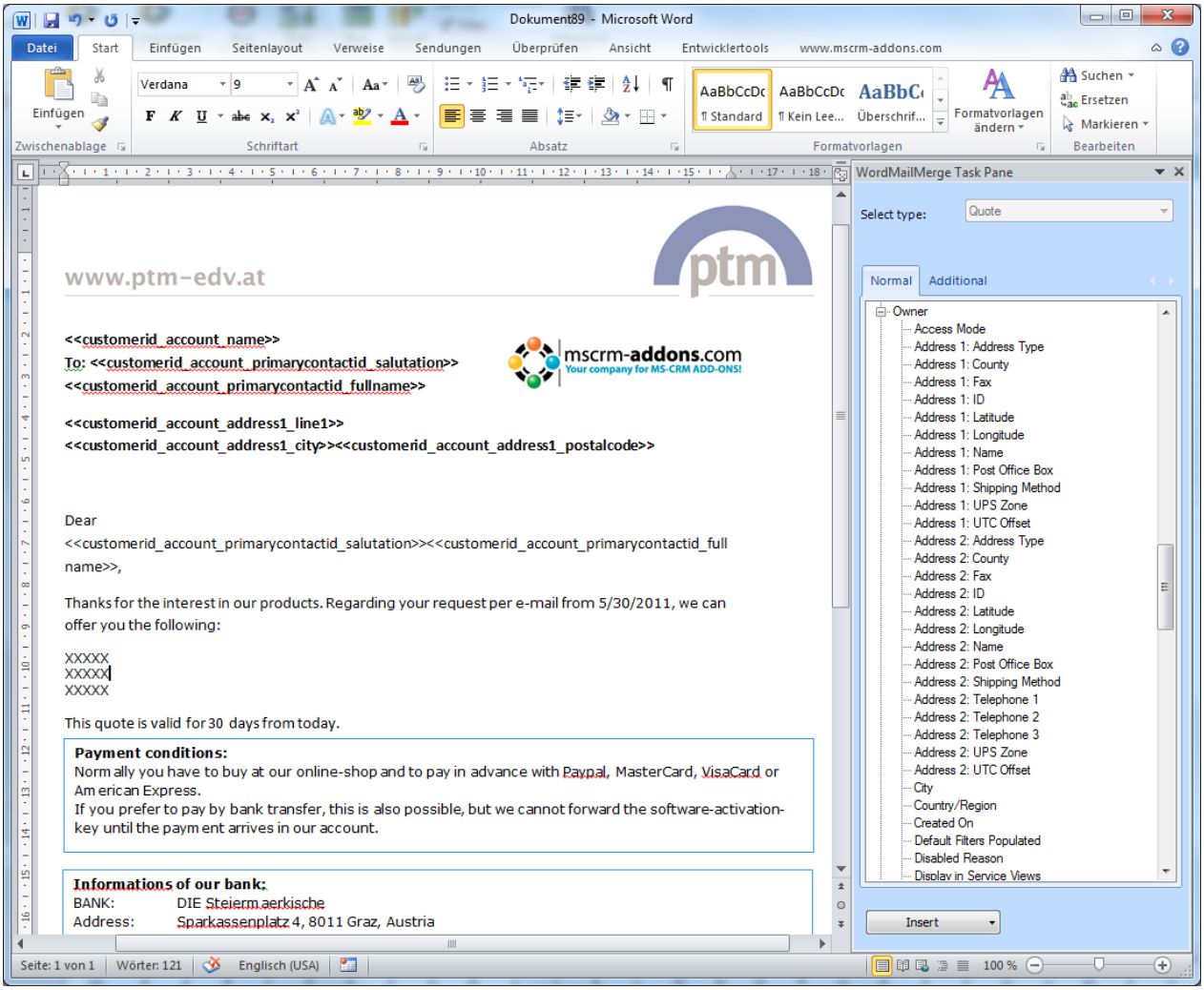
   In our case this is a Header containing information about the customer (address, contact-information,…) a list of products grouped by subject and a footer.

   As in the previous chapter we can do this by simply opening the "Insert Mailmerge fields dialogue" and insert the fields we want. All N:1 relations are resolved automatically, therefore we can insert fields from the potential customer , owner,… aswell.

   First we have to choose "Quote" in the "Select type"-dropdown-Box.



After inserting some fields and pictures, our basic quote template is ready and looks like this:

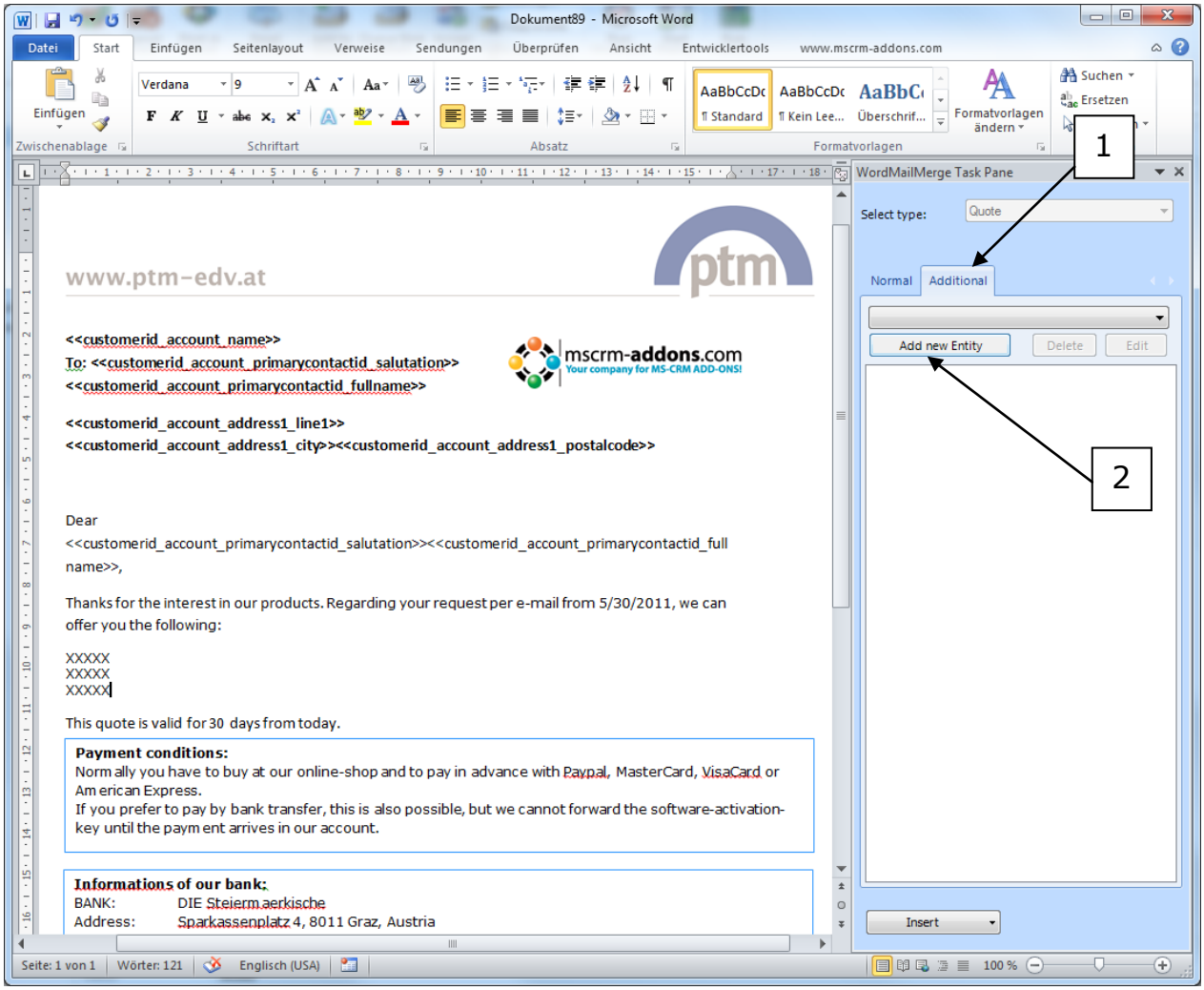


The XXXX – part marks the place where we want to add the list of quote-products including a total field at the end.

When using Standard templates, we would now have to ad if-statements and switch the directory type and so on. With Office Open XML, this is a lot easier.

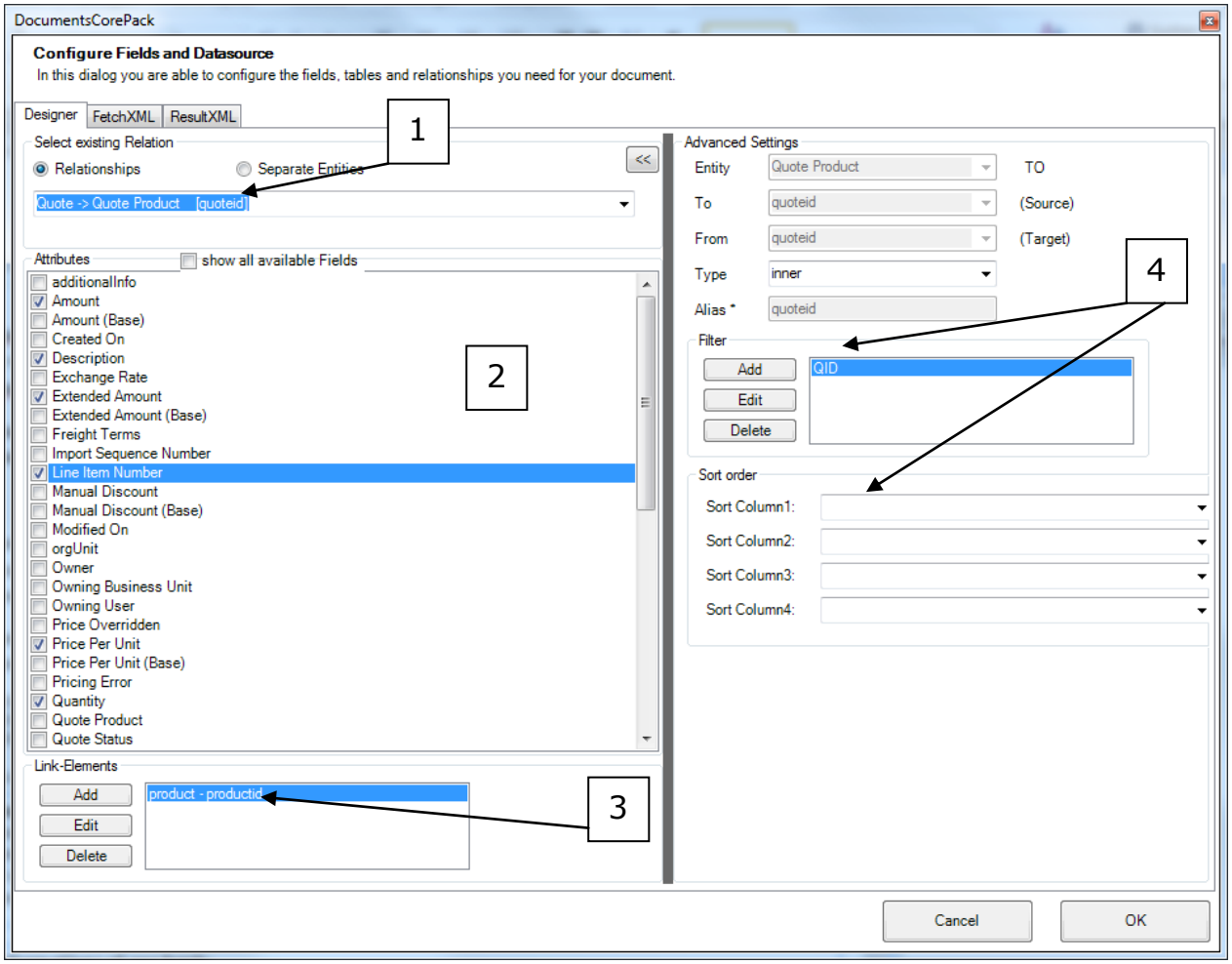
2. Add line-item relationship

First we need to resolve the Quote-QuoteProduct relationship. Therefore we need to click on the [Additional]-tab in the InsertMailMerge-Fields taskbar.



The **„Additional"** section allows to resolve any relation within CRM and brings up a list of all attributes from the related entities so that they can be used within the document too.

When hitting the "Add new Entity" button, following window appears:



Here we can choose a relationship(1) (Quote->Quote Product in our example) and select the fields that should be available for insertion (2).

At the bottom we can add further link-elements the same way. E.g QuoteProduct->Product (3).

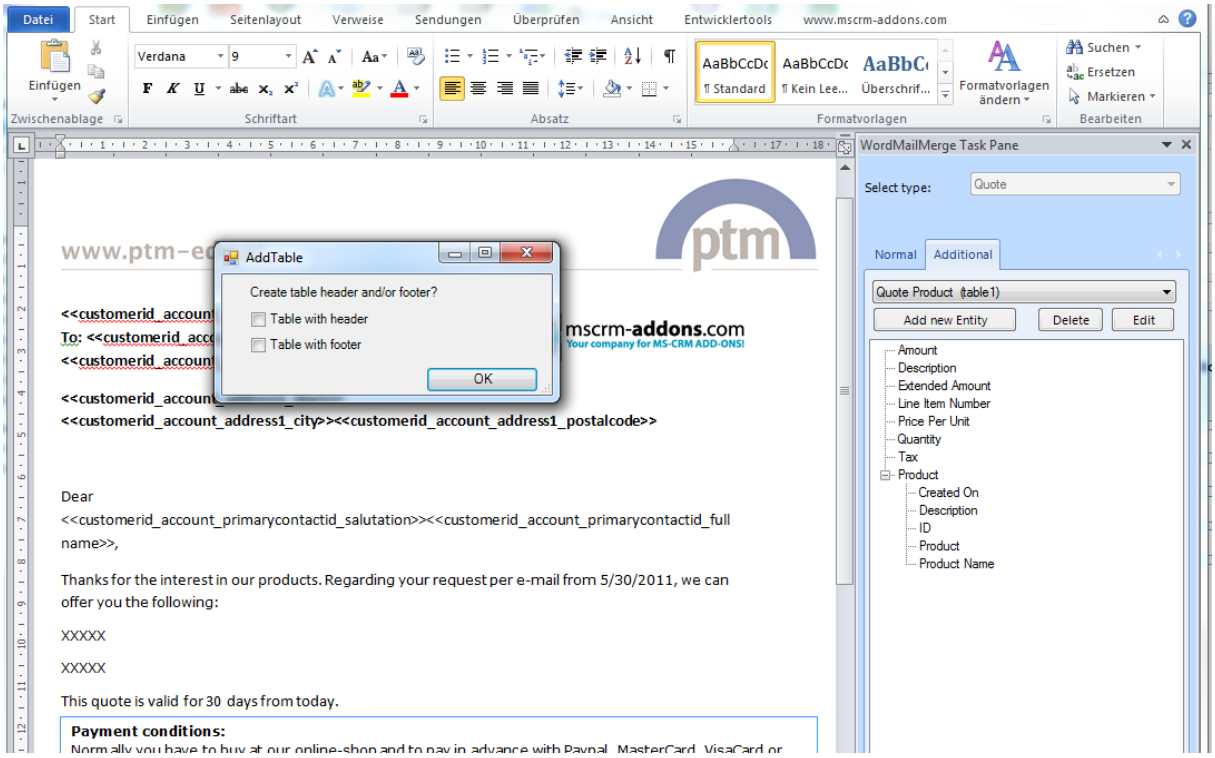
If necessary we could also define a sort-order for the quote-products or specify a filter value.(4)

That's basically all we need. We can finish this procedure with a click on [OK]

3. Inserting table

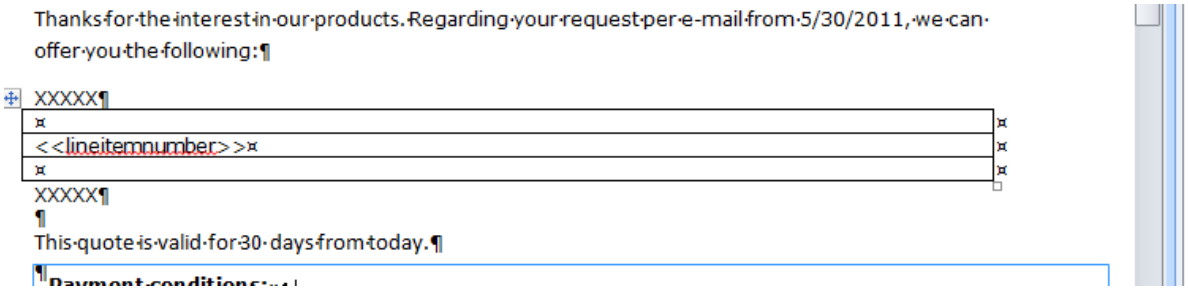
When getting back to the template, we can see that the attributes chosen at step 2 are now listed in the task-Pane.

The procedure of inserting a table of items is completely automated, so we just need to set the curser to the position where we want to add the table and double click on one of those attributes. The following message will appear:



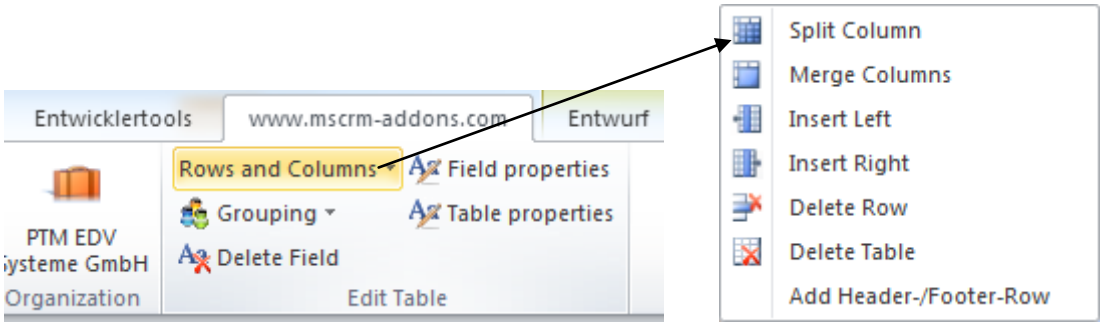
So we can choose whether we want to add a table header or not. In our case we choose header + footer and proceed with a click on [OK].

As a result the table will be inserted at the given position:



4. Formatting the table

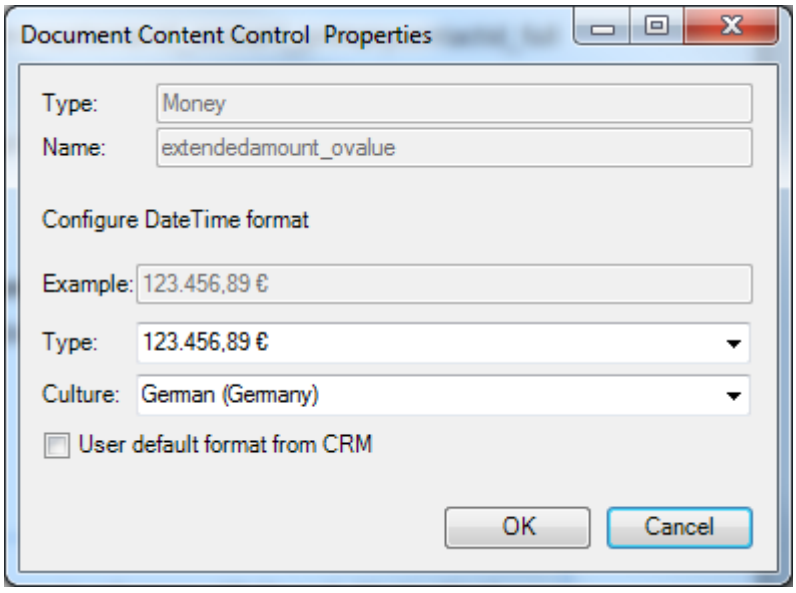
Once the table is inserted we can add fields like quantity, product-name or even a table header with column-names with the formatting Options available on the www.mscrm-addons.com - Ribbon:



Once finished our table could look something like this:

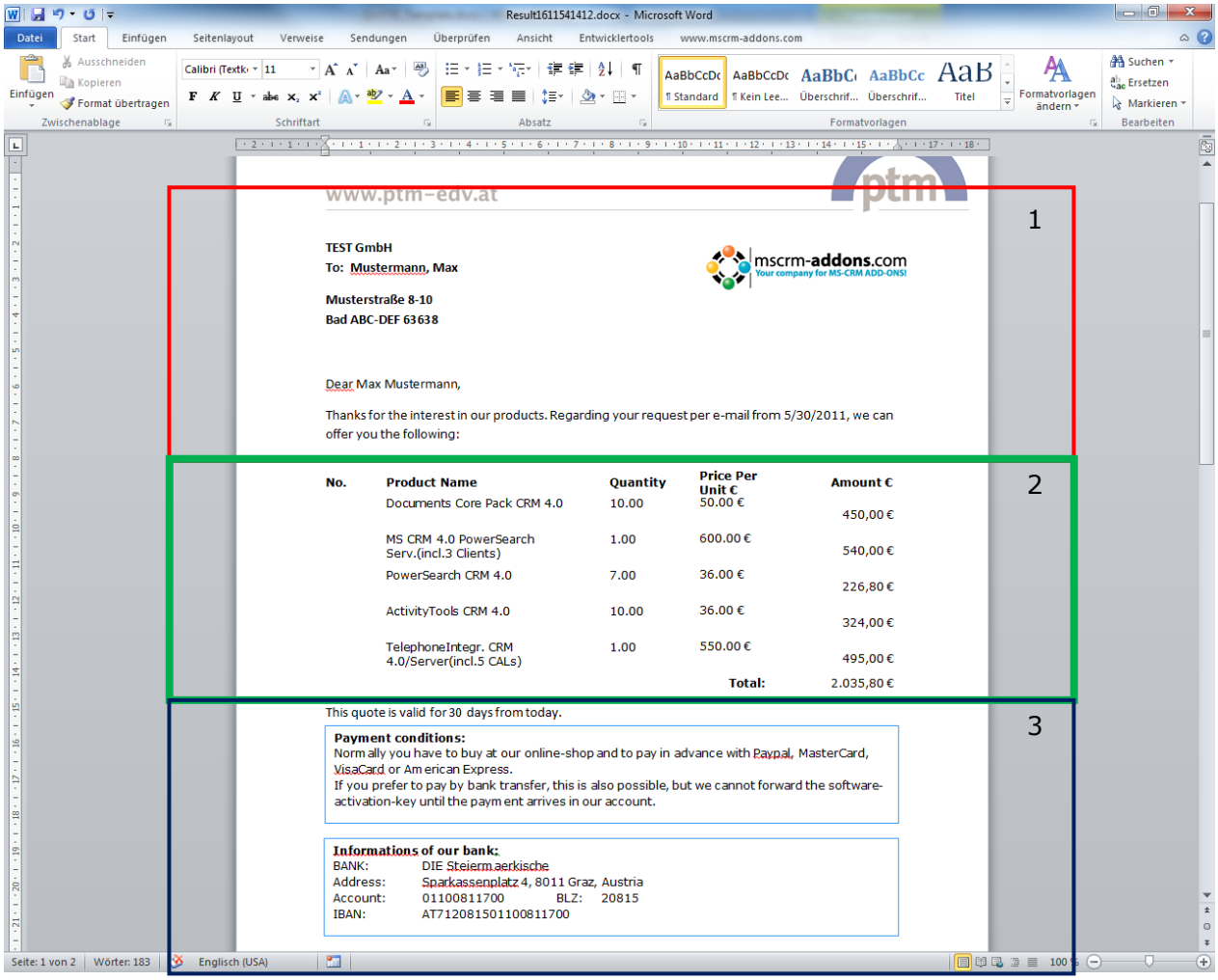
No.	Product Name	Quantity	Price Per Unit €	Amount €
<<lineitemnumber>>	<<quoteid_productid_name>>	<<quantity>>	<<priceperunit>>	<<extendedamount>>
			Total:	**<<extendedamount>>**

The "Field properties" allow us to specify e.g. the format of money fields like <<extendedamount>>:



5. Result

After saving the document and Choosing CRM-data we can see the result with the replaced fields at the top (1), the line item table including the sum in the middle (2) and the bank-details at the bottom (3).



3 Generate and save documents back to CRM

In this chapter we will take a look on the two possibilities to write generated documents back to CRM:

1. Create CRM activity
2. Send as PDF

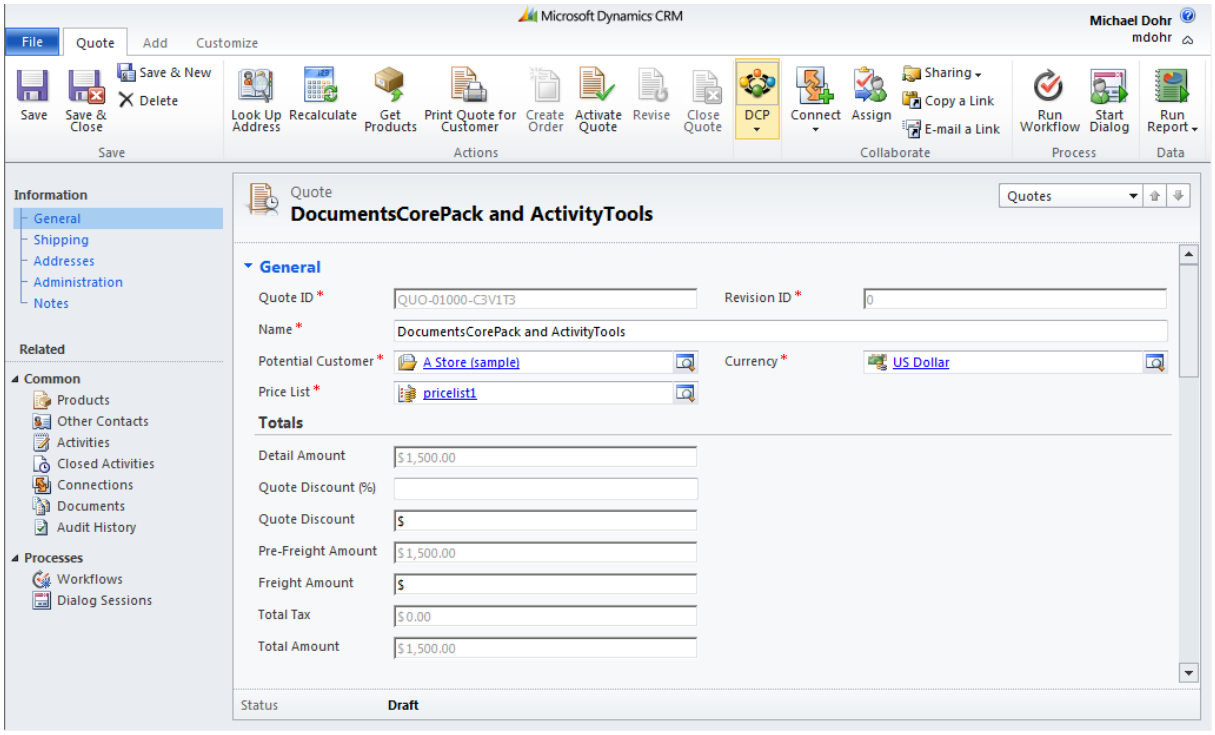
We will work with the Templates included in the setup and explain both options Step-by-Step

After doing that, the word document will be accessible in MS CRM and you are able to e.g. Send an email with the PDF-document attached.

3.1 Generate a document -Step by Step Description

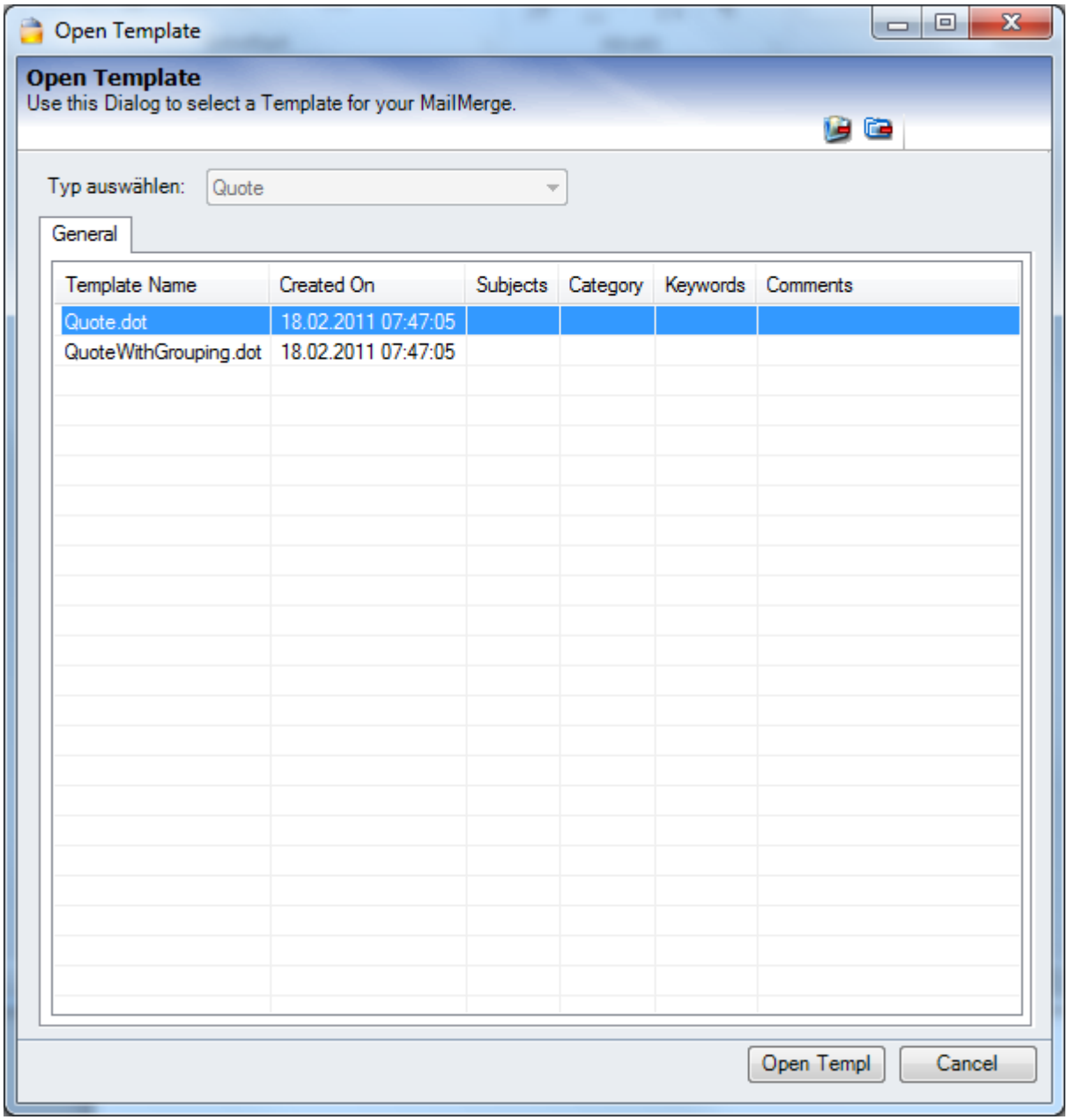
Step 1: Open a quote and click on the new button 'Print'

First we need to generate a document. As described in Chapter 2, we open the CRM-record we want to create a document for and start with a click on "Print in Word". In our case we will use a quote.

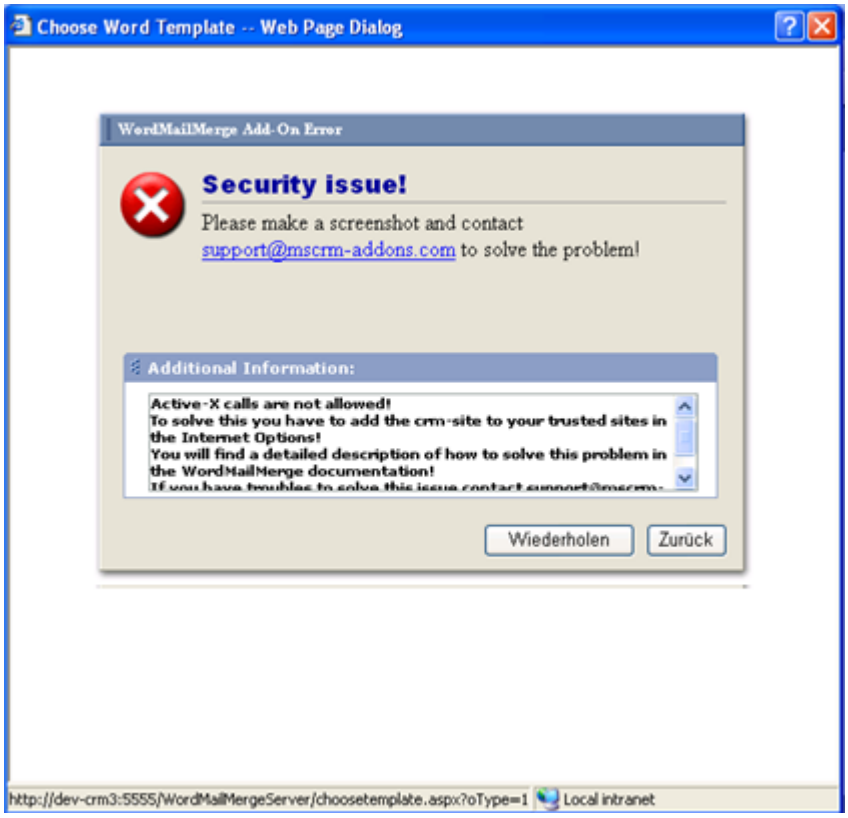


Step 2: Select a template

A window appears which allows you to select the template you want to use. Choose a template and proceed with a click on "OK".

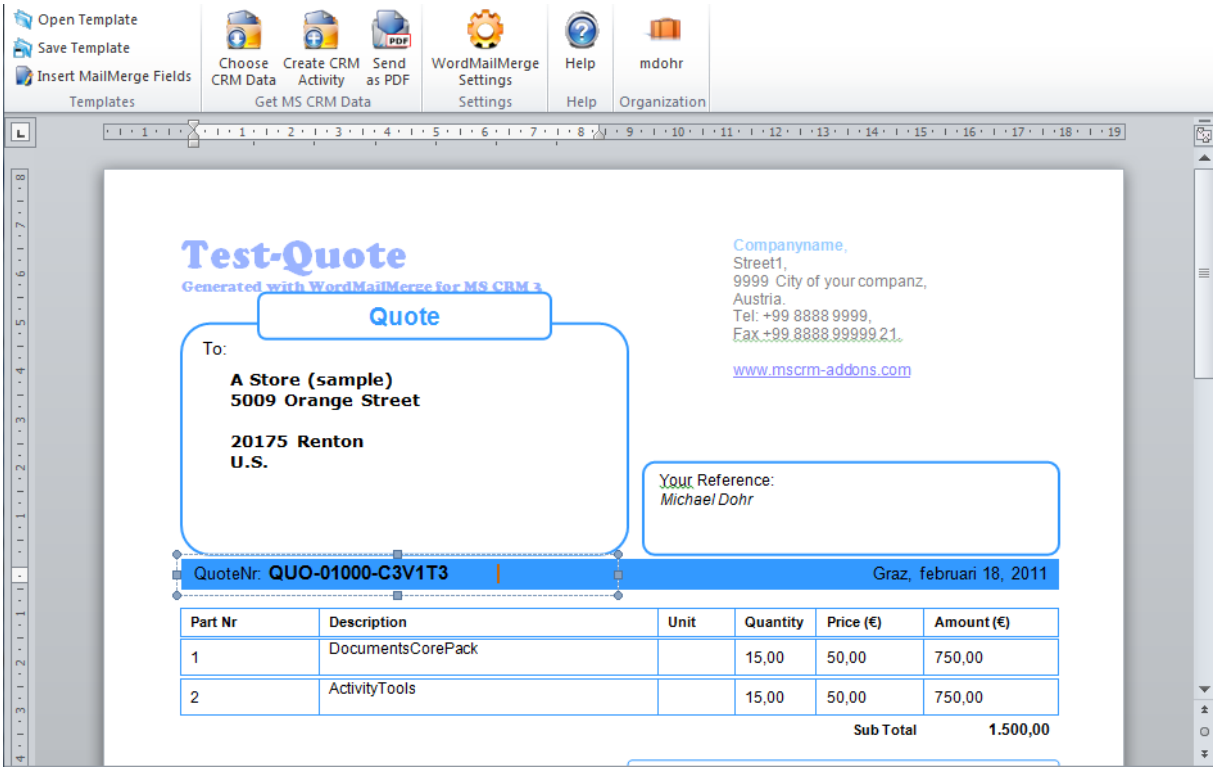


If you receive the following 'Security issue', open the Installation Guide and go to Chapter 1.4.1 (Installing the client component/Prerequisites). There you will find a description of what you have to do, to solve this issue.



Step 3: Result

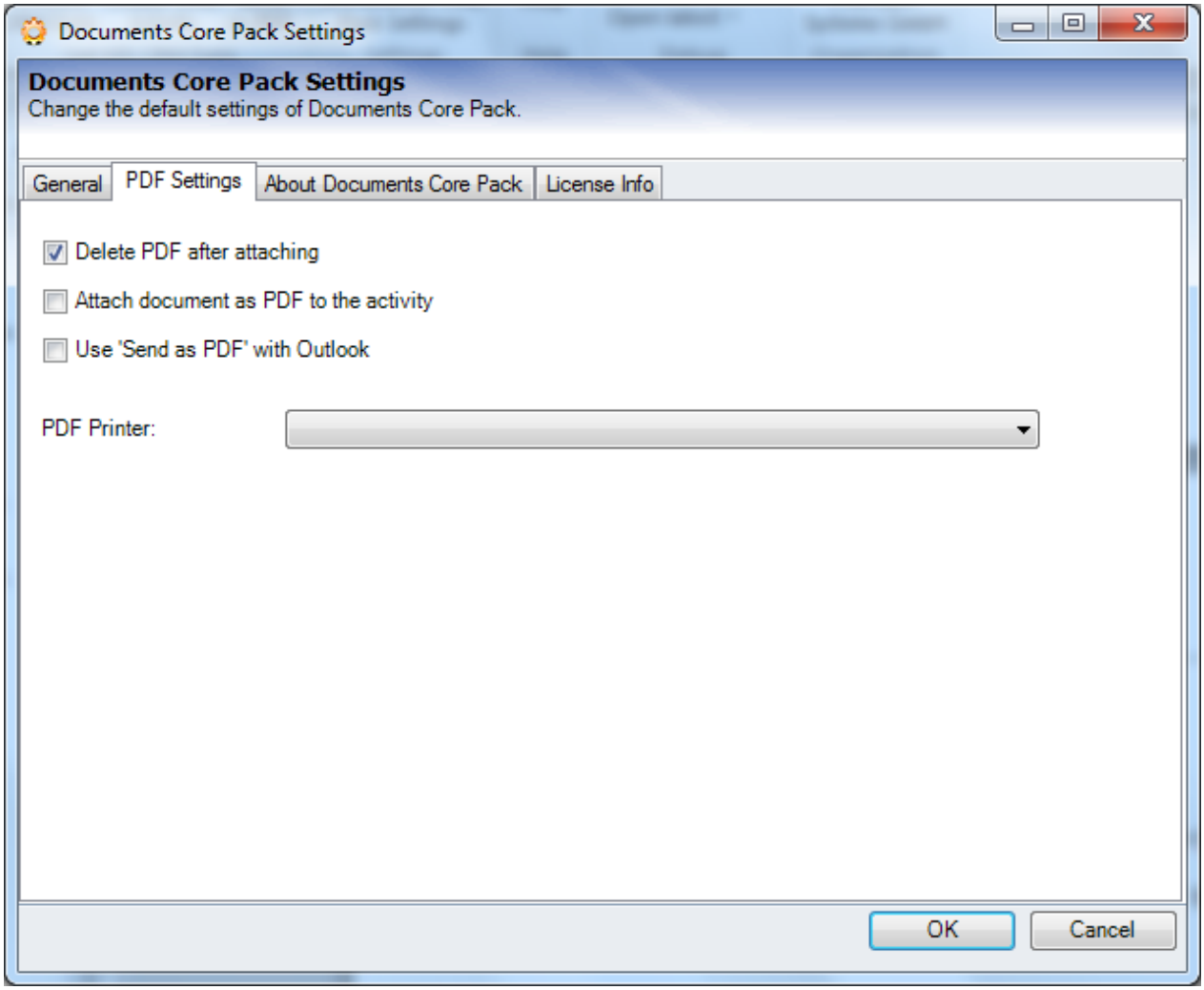
As result you get a quote which has already replaced the merge fields with the data out of the MS CRM.



Now the document is ready and we can save the document back to CRM.

3.2 Send as PDF

INFO: PDF-settings
These settings can be accessed in MS Word->WordMailMerge Settings->PDF-settings (2nd tab)
Here we can define which PDF-printer should be used, how the temporary saved PDF files should be handled and whether Outlook should be used to send the mail or not.

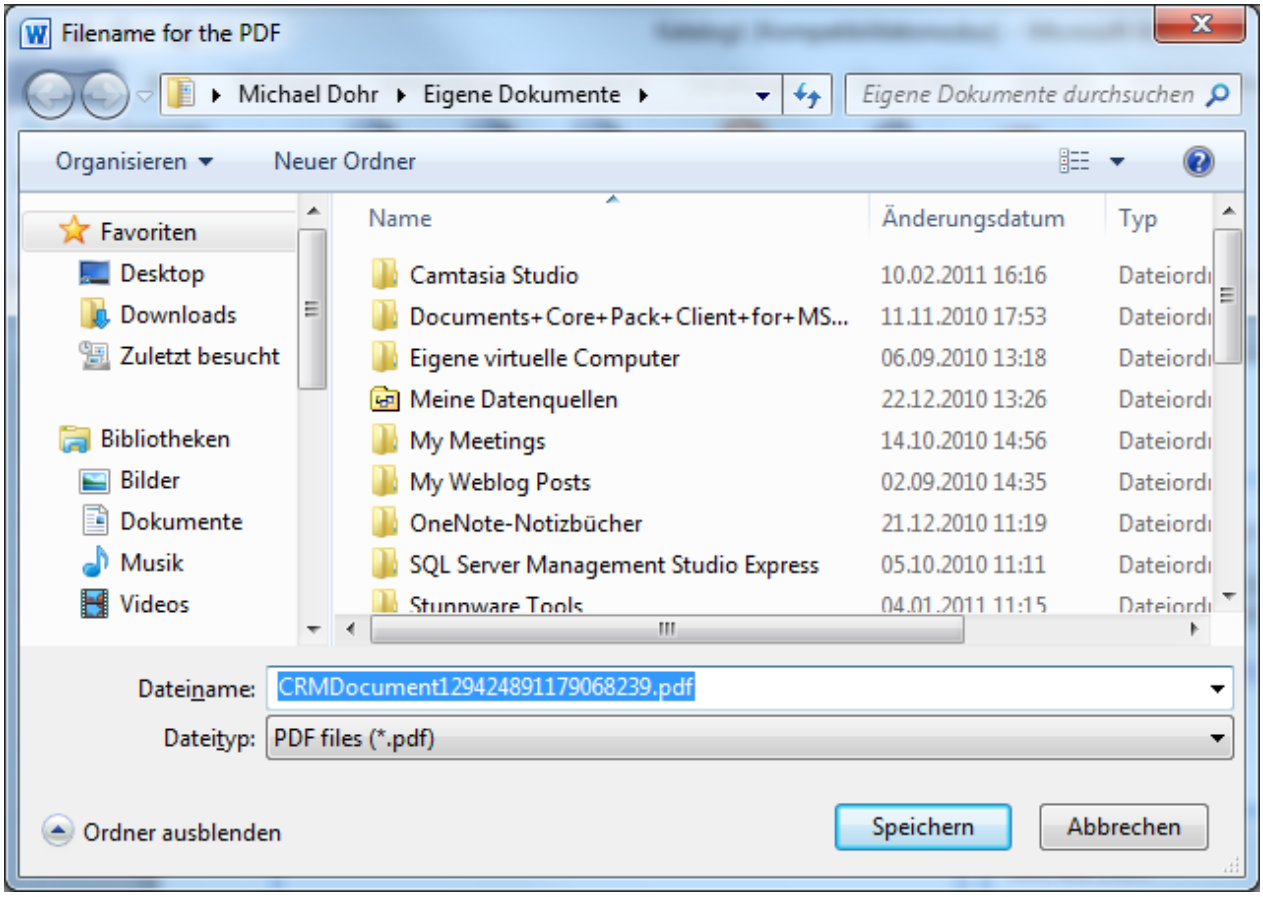


PDF Printer:
- MS Office Save as PDF Add-In for Office 2007 / 2010 (free Download)
- PDF Creator (free Download)

Step 1: Click on "Send as PDF"

After clicking the button

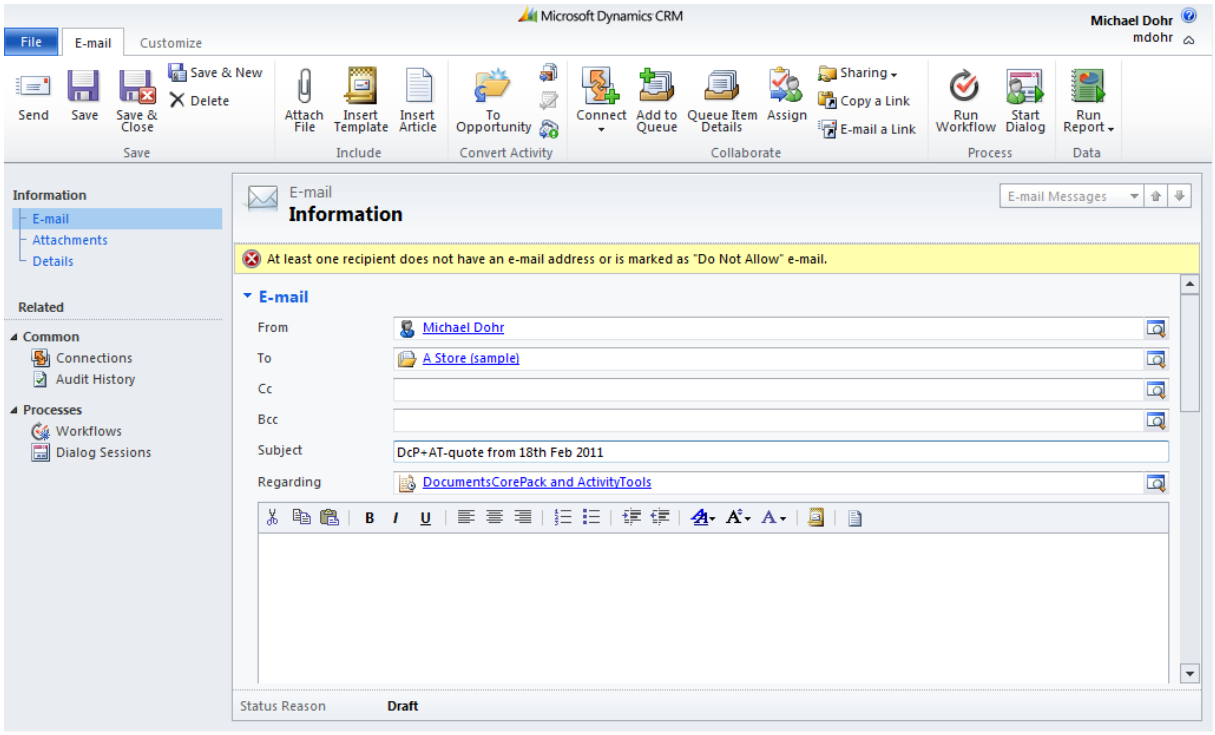
A "SaveFile-dialog" will appear that allows us to choose the name for the PDF-file and where it should be saved temporary.



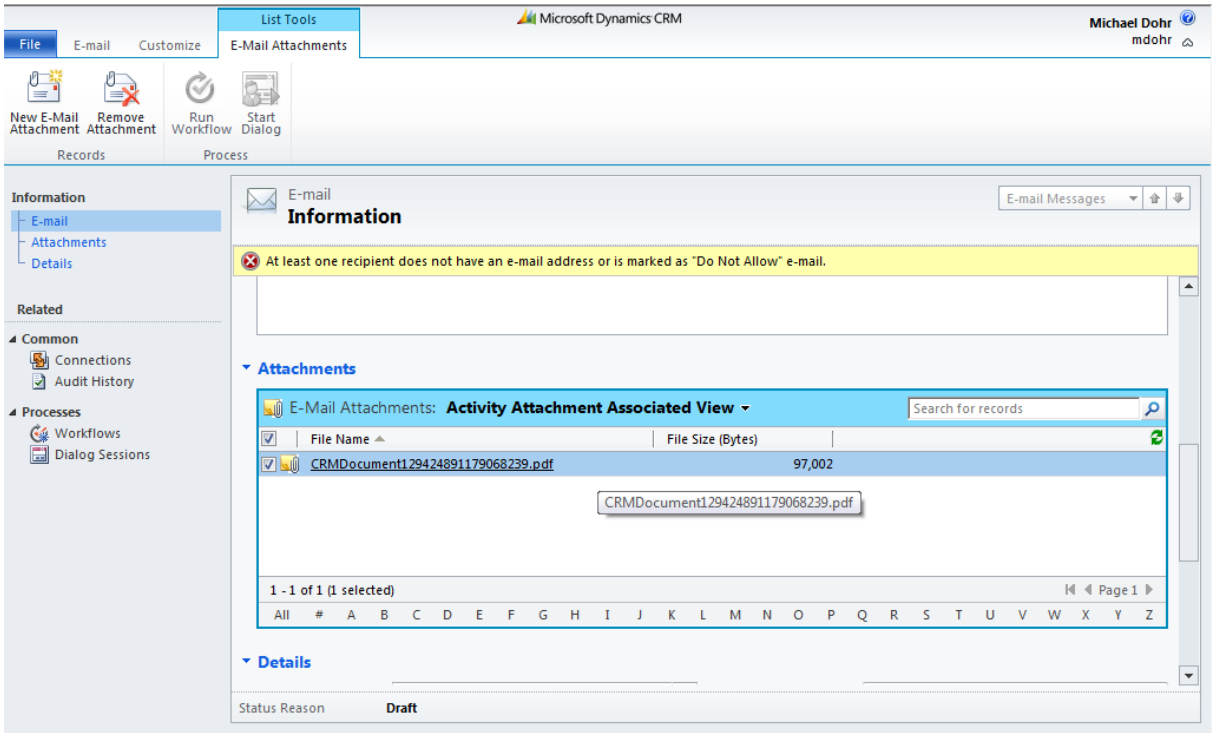
After clicking [Save], DCP will generate the PDF, create and bring up a new email-activity with the PDF-file attached.

Step 2a: Result – "use Send as Pdf with Outlook"- UNCHECKED

The result is that the following window appears and we can add the email-content, before sending the email with the attached PDF.



In the "Attachment"-section will see the attached PDF.



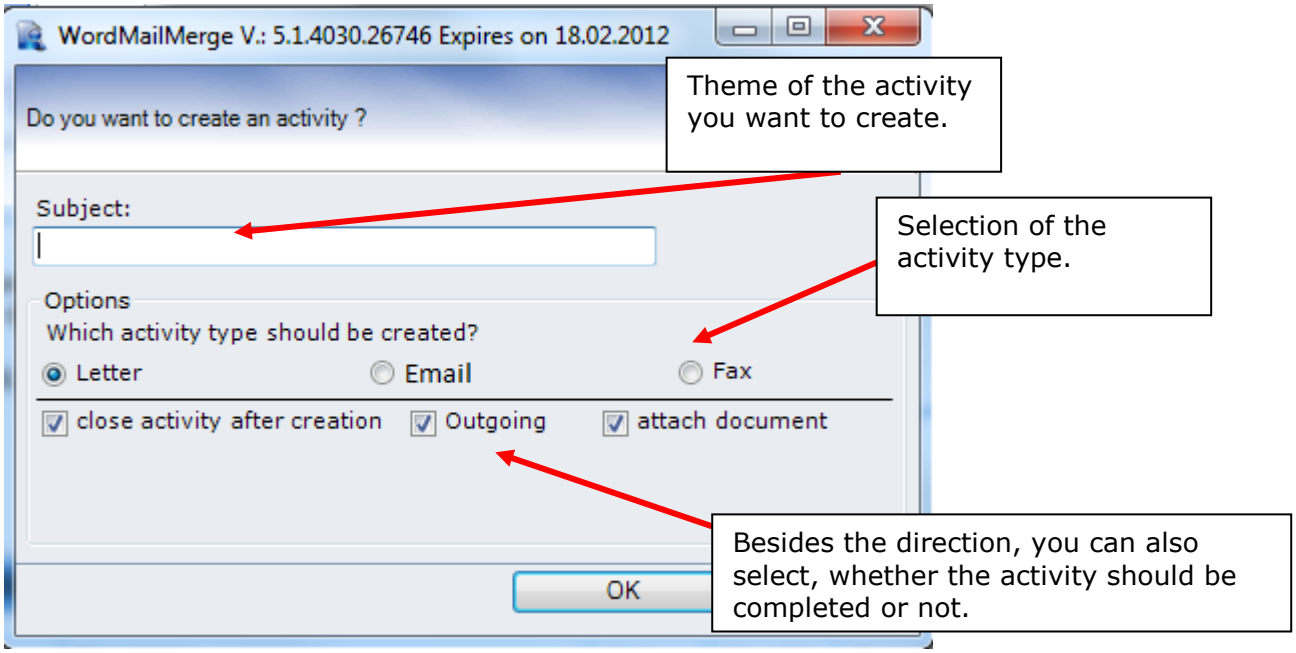
Step 2b: Result – "use Send as Pdf with Outlook"- CHECKED

In this case, a new email will be opened in Outlook

3.3 Create CRM Activity

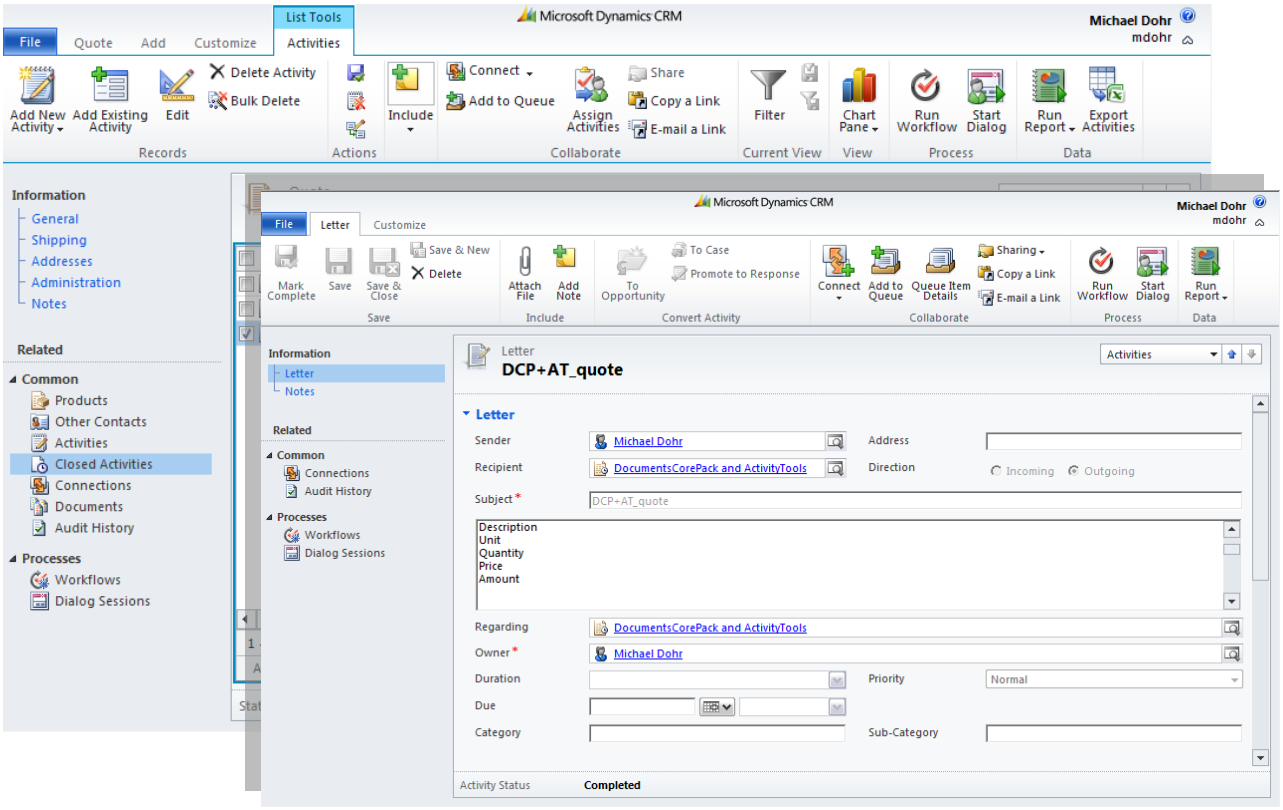
Next to the "Send as PDF"-option, DCP provides the possibility to Create Letter,Fax and Email activities with the document attached

The following dialog will pop up after pressing the [**Create CRM Activity**]-button:



If you want to create a new activity for a document where an activity has already been created you'll see a dialog that allows to select whether to create a new activity, add the document to the existing activity or to replace the existing document with the new one.

Result



The Word document has been added to the “Notes” tab.

INFO: When using Sharepoint or FileExplorer Integration, the document will be saved on the specified location and the activity contains a direct link to the document.

4 Performing a mail merge with many records

This chapter will show some of the basic features provided by DCP regarding mailmerge-procedures with multiple records.

This includes:

1) Create letters for multiple records (e.g. contacts)
2) Using Saved views to choose data
3) Running a mailmerge for marketing lists

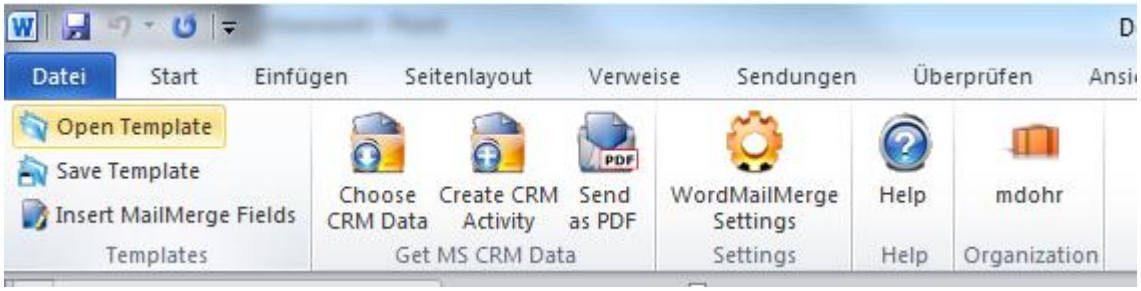
4.1 Step by Step Description – Create letter for many records

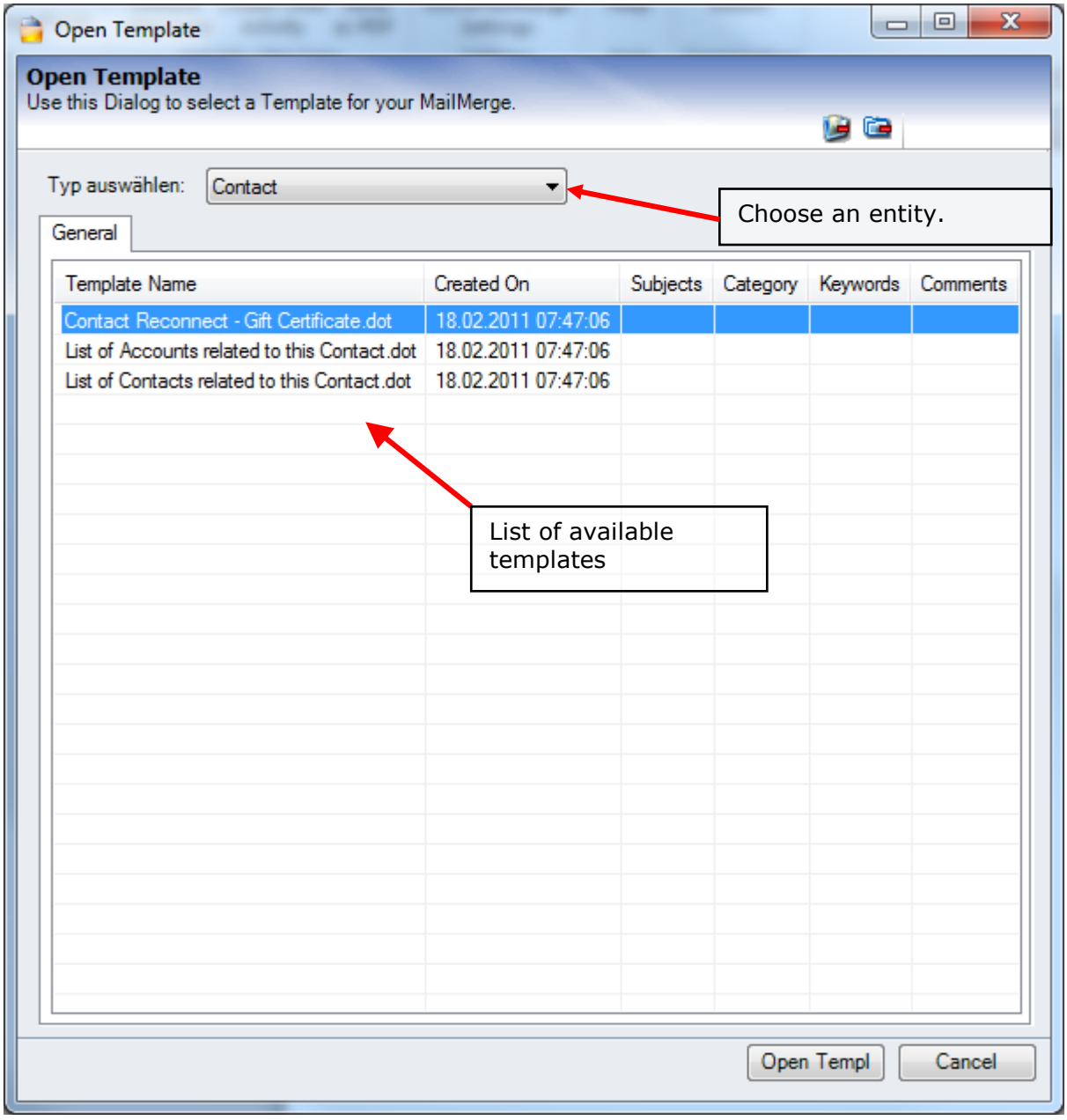
In our example we want to send a Certificate-letter to some contacts
.

Step 1: Open Word and choose a template

The templates are separated by entities, this means every template belongs to an entity.

Click on "Open Template" in "Documents Core Pack for MS CRM".





We can proceed with a click on [Open Template].

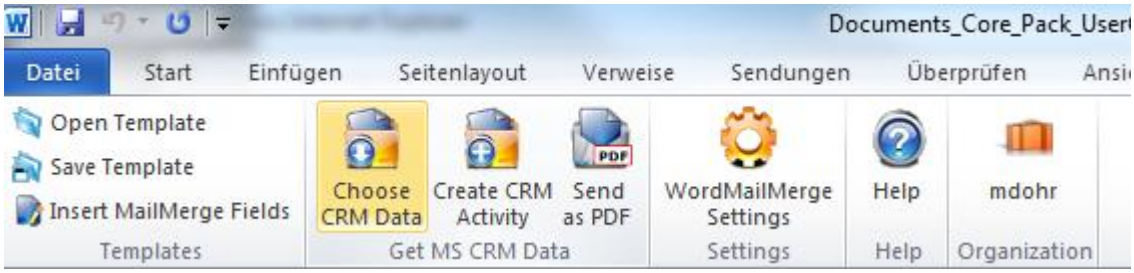
A document, based on the selected template will be opened.

«ownerid_lastname»«ownerid_firstname»¶
Adventure Works Cycle¶
¶
February 18, 2011¶
¶
«firstname»«lastname»¶
«address1_line1»¶
«address1_line2»¶
«address1_line3»¶
«address2_city»«address1_stateorprovince»«address1_postalcode»¶
«address1_country»¶
¶
Dear «salutation» «lastname»,¶
¶
I would like to check in and make sure you are still enjoying our products, since we have not

These are Merge- or form letter-fields which are filled with the data from CRM.

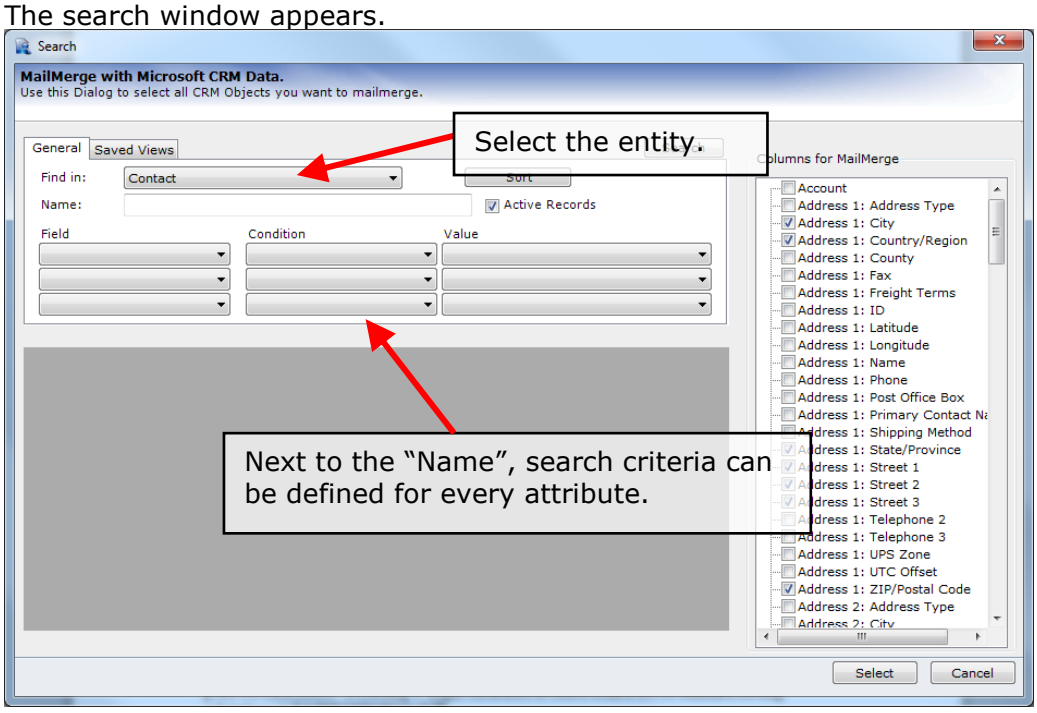
Step 2: Choose CRM Data

Now we have to select the contacts we want to create a letter for. Therefor we proceed with a click on "Choose CRM data"



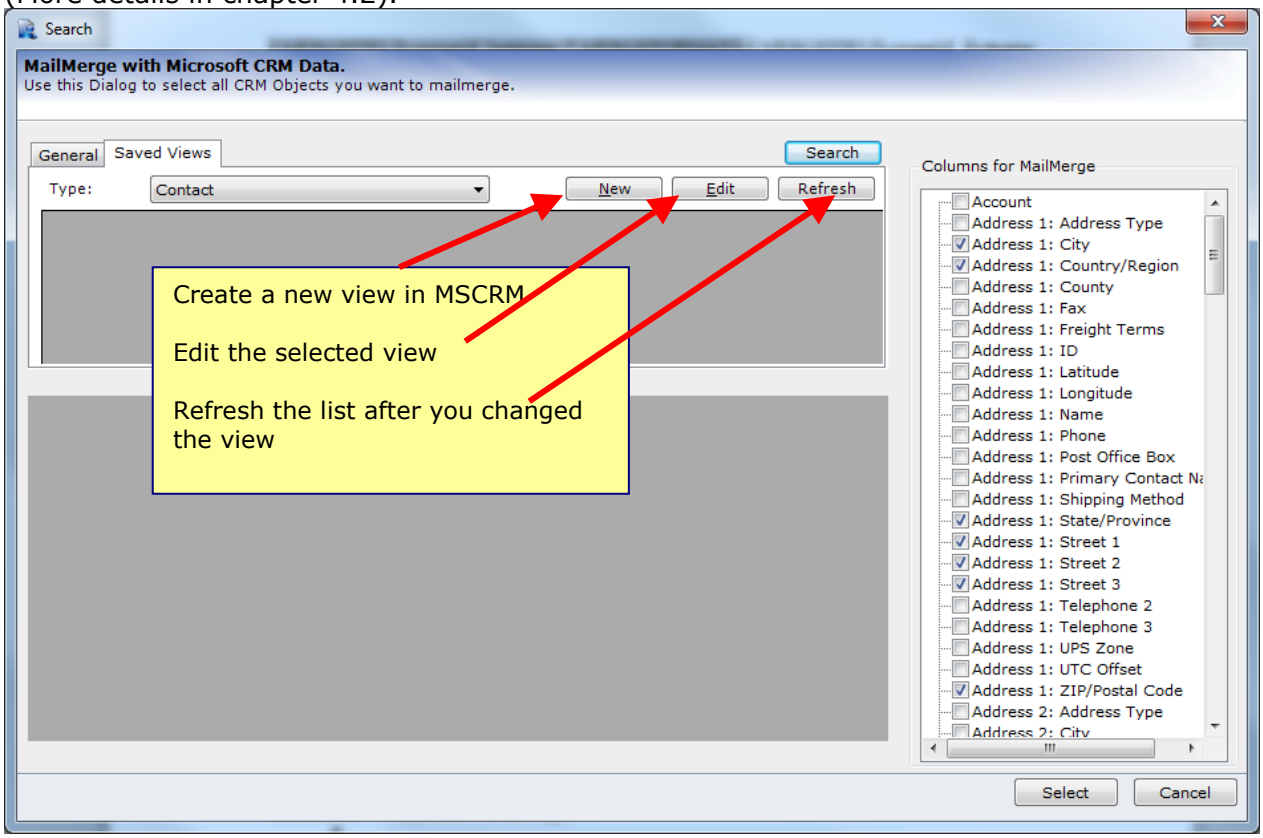
Step 3: Search Window

The search window appears.



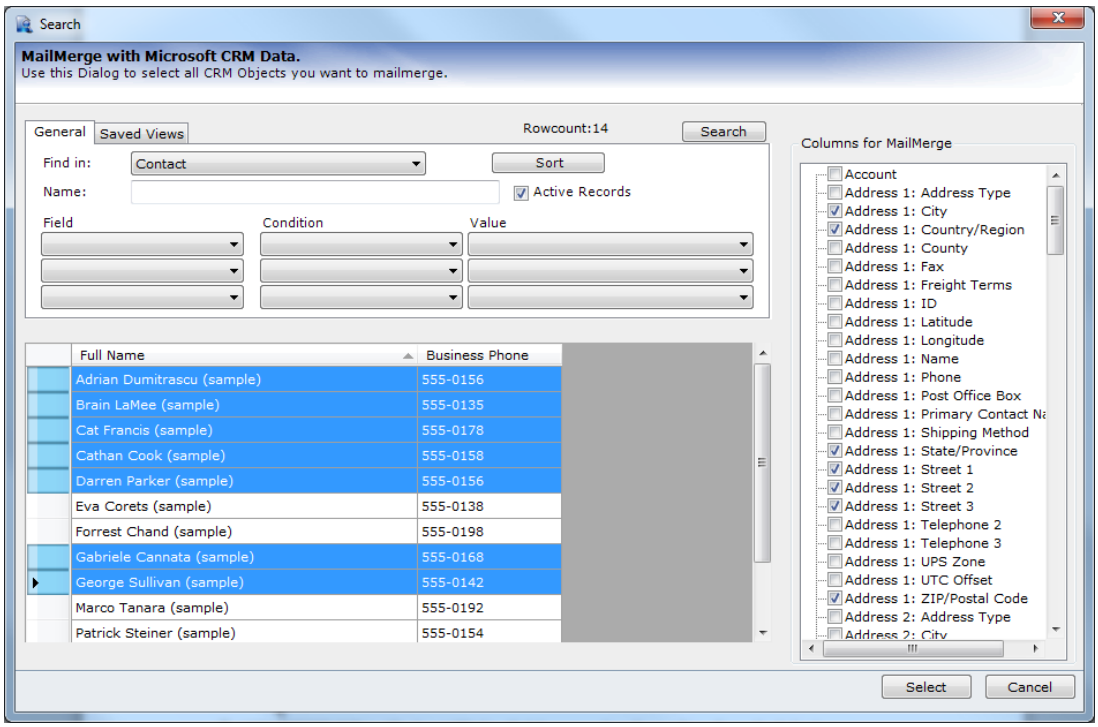
Step 4: Using Saved Views

You also can use Saved Views that have been defined via an "Advanced Find" in MS CRM
(More details in chapter 4.2).



Step 5: Select the records and click on the [Select] button.

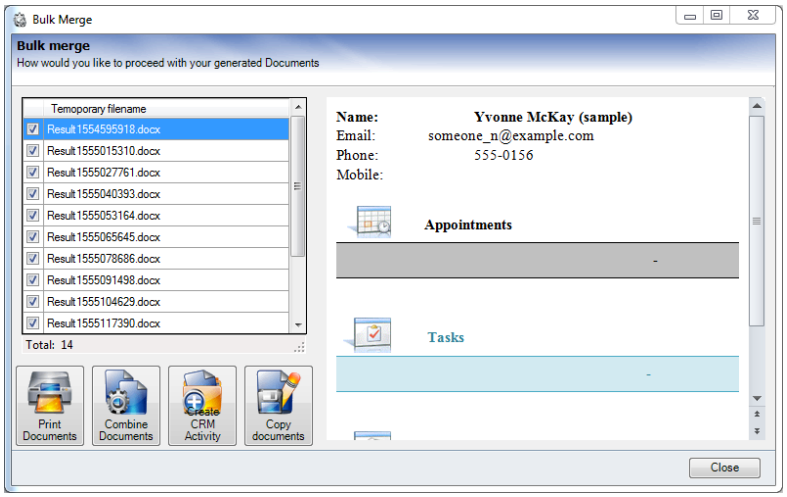
Once we have found the records we want to merge, we can select the entries and proceed with a click on [Select]



The data will be loaded into MS Word. It will not automatically generate documents for each record (as the number of records could be e.g. > 500) but we can generate and write the documents back to CRM via "Create CRM Activity" (see chapter 3.3)

Step 5a: when using "docx"-templates

You will see the following dialog. This Dialog shows you a list of the generated documents. (with versions prior 5.44 this dialog did not show up, instead every single document was opened directly in Word)
At this point the documents only have a temporary name. This name will be replaced with the "DocumentName" property if this is set in the properties.
You can click on the single entries and check the preview on the right side of the dialog. Open and edit the generated documents by double clicking on the item.



Within this dialog you also have additional features as in:

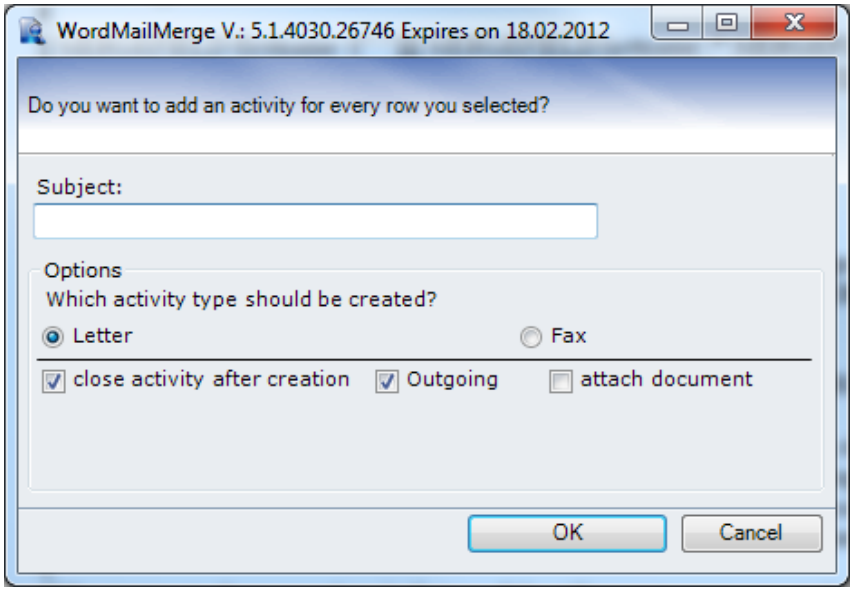
Print Documents:
Sends all the generated documents to your default printer. The printer itself or the settings can be changed within windows printer settings.

Combine Documents:
When this option is used, all generated documents will be combined into one big word document. This document will be opened after the combine process has finished.

Create CRM Activity:
See: ***Step 6 below***

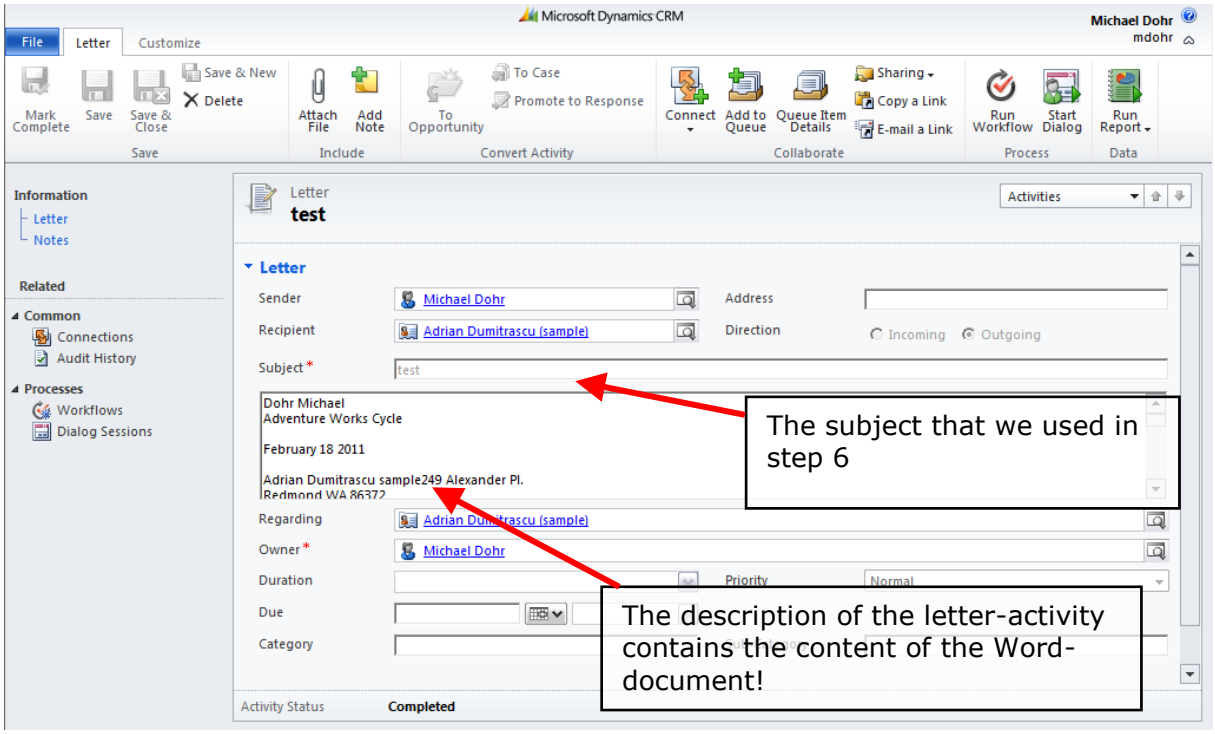
Copy documents:
You can copy the temporary generated documents to a location of your choice. During this step, the "DocumentName" property will be applied. In case of name conflicts the name will be extended with a continuing number.

Step 6: Click on the [Create CRM Activity]
We can choose the activity type, Subject and specify some further settings and proceed with a click on [ok]



Step 7: Result

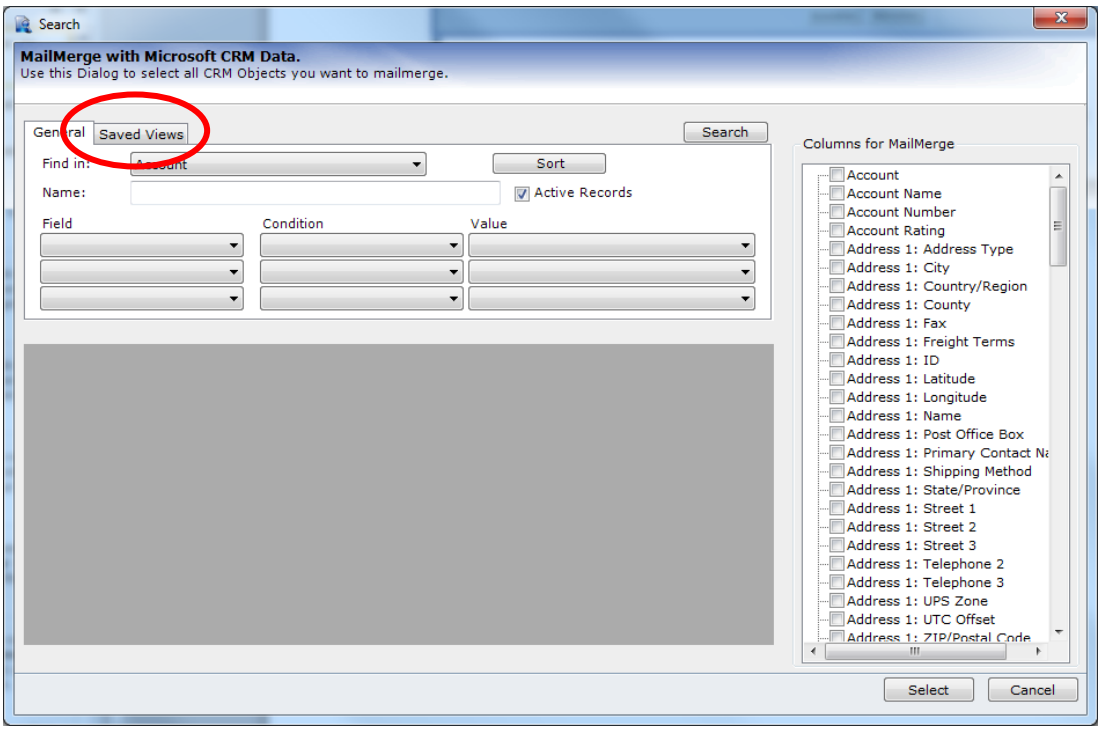
Within CRM we can see that a new activity has been created for each of the chosen contacts.



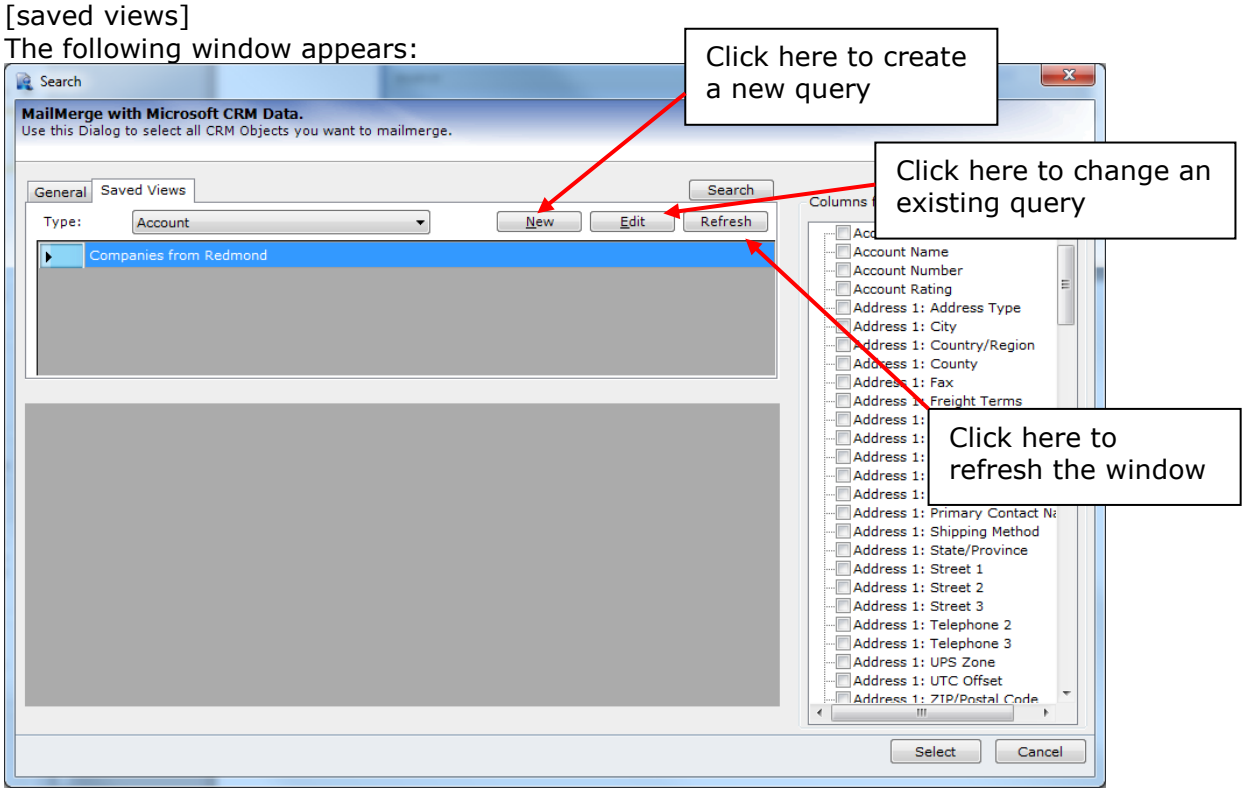
4.2 Using „Saved Views" to choose data

Step 1: Click on [Choose CRM Data]

By clicking on [Choose CRM Data] in MS Word, the search window will be opened.

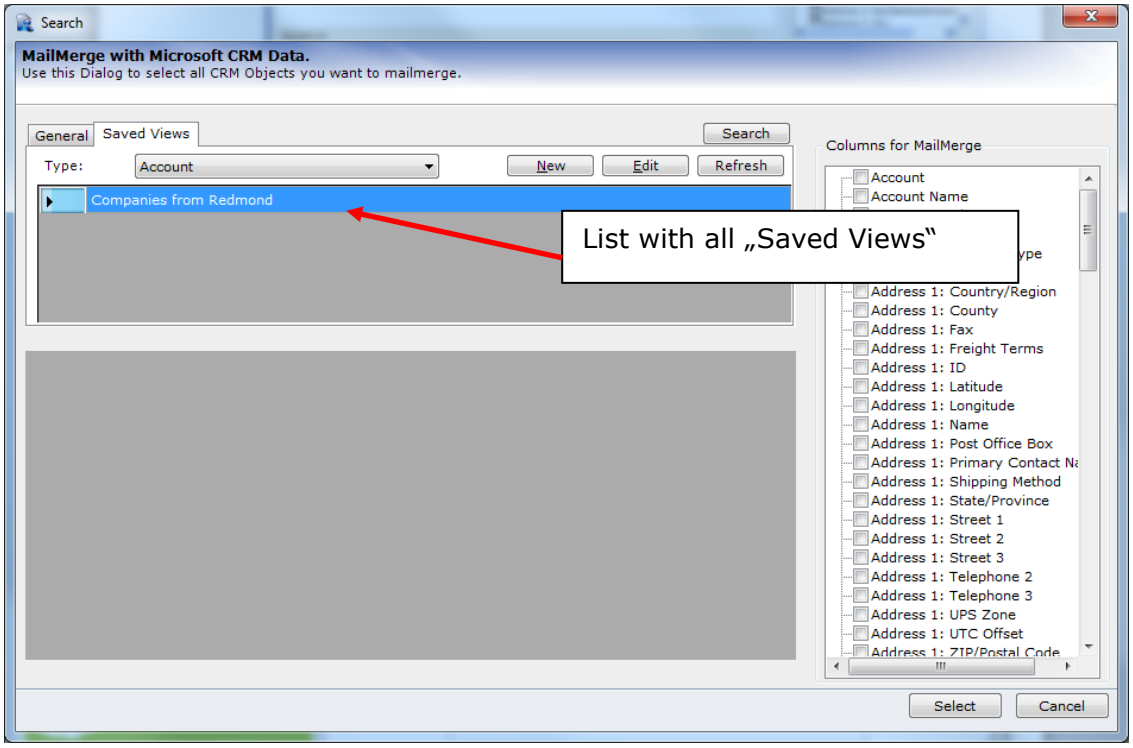


To choose the records by using saved views, we have to change to the register [saved views]
The following window appears:



Step 2: Choosing the view

We can proceed and open the records retrieved by this view with a double click on the view.



The results will appear, we can choose the records we want to use and go ahead by clicking on the [Choose] button. DCP will now load the data to word and we can e.g. “create CRM activities” as described in chapter 3.3 or 4.1

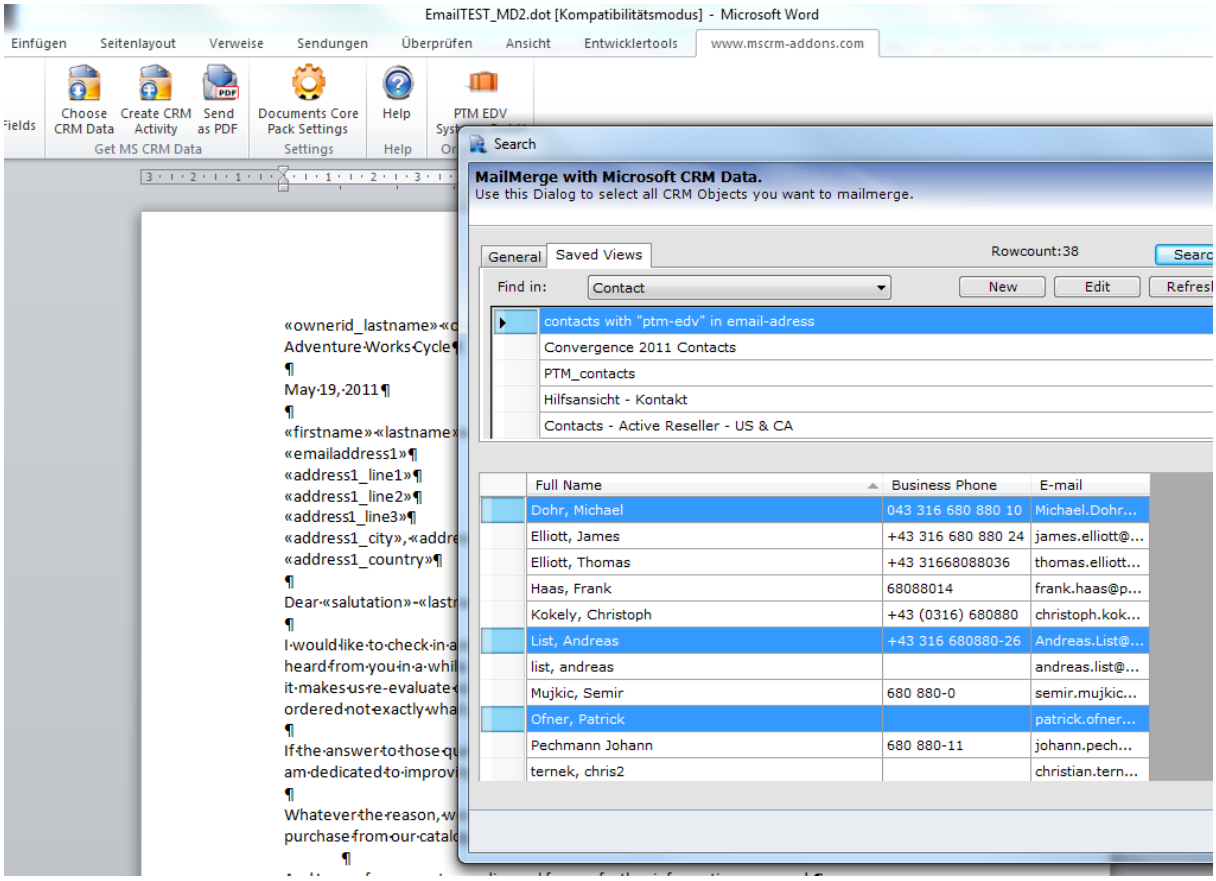
5 Sending Mails via Outlook

This chapter explains how DCP can be used to send emails containing the generated document.
To use this option you need Outlook installed on your client machine, and also the CRM Outlook Client. The Entity that contains the email address of the recipient must be synchronized with Outlook to resolve the recipient during the sending process.

5.1 Open template and load records

First we have to choose a template we want to use and load the CRM-records (contacts, accounts,…) that should receive the email.
Therefore we have to "Performing a mail merge with many records" as described in chapter 4.

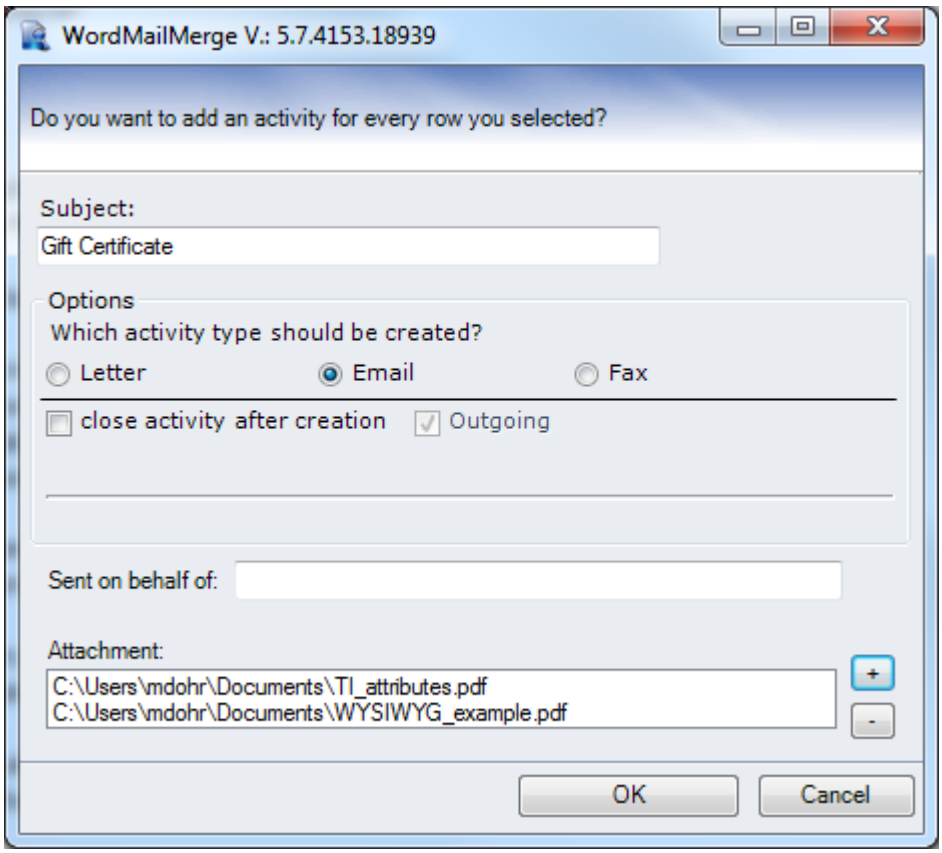
In our example we use the "Gift certificate"-template that comes with the installation and select 4 contacts.



Result: The records will be loaded into the template. We can now proceed with a click on "Create CRM activity"

5.2 Create e-mail activity

A click on „Create CRM-activity" brings up the following dialog.
Selecting "Email" allows you to define some email-specific properties:



Subject: Subject of the created Email

Sent on behalf of: define the sender (from-email adress). If empty, the default sender used by Outlook will be set.

Attachment: Allows to add some attachments like Terms & conditions or any other document.

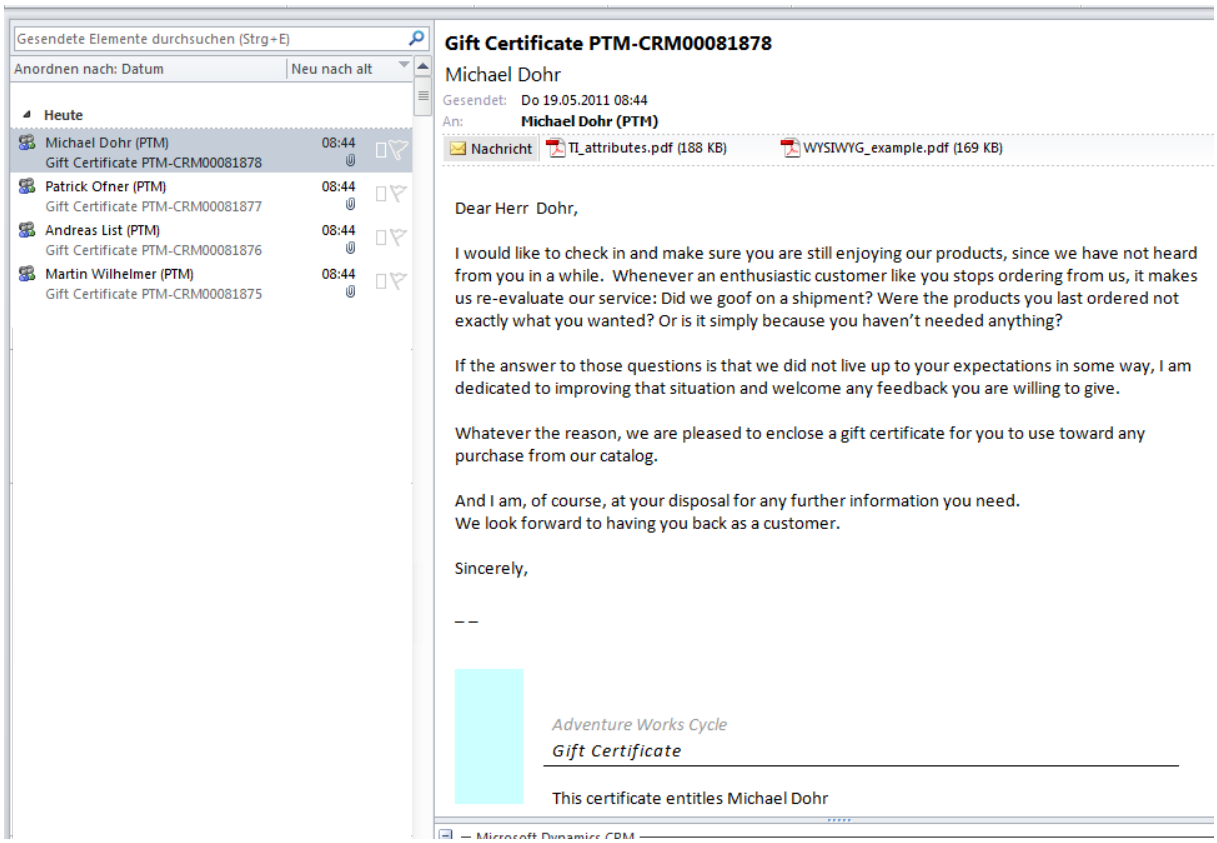
So in our example we are sending the "Gift Certificate" mail including 2 files to 4 contacts

Everything is defined, so we can proceed with a click on [OK]

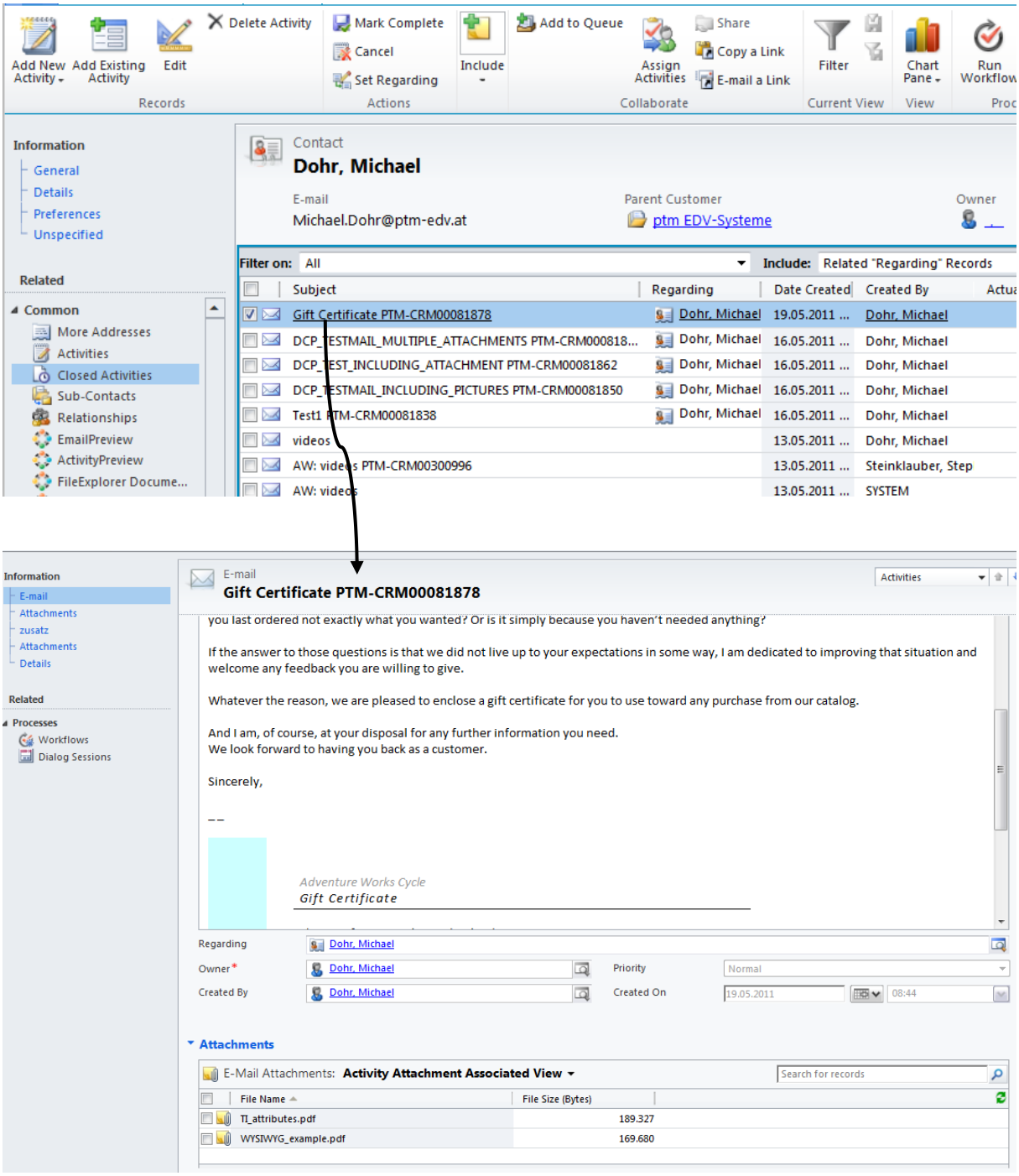
5.3 The Result

After hitting the [OK] button, Outlook will start sending the mails. Depending on the size of the document and number of attachments, this could take up to 3 seconds per mail.

Once the procedure is completed we can see, that the mails are appearing under "Send Items" within Outlook:



The CRM-Outlook-client will synchronize the mails with CRM, so a CRM-email-activity will be created for each contact automatically and therefore appear in the activity/history of those contacts:

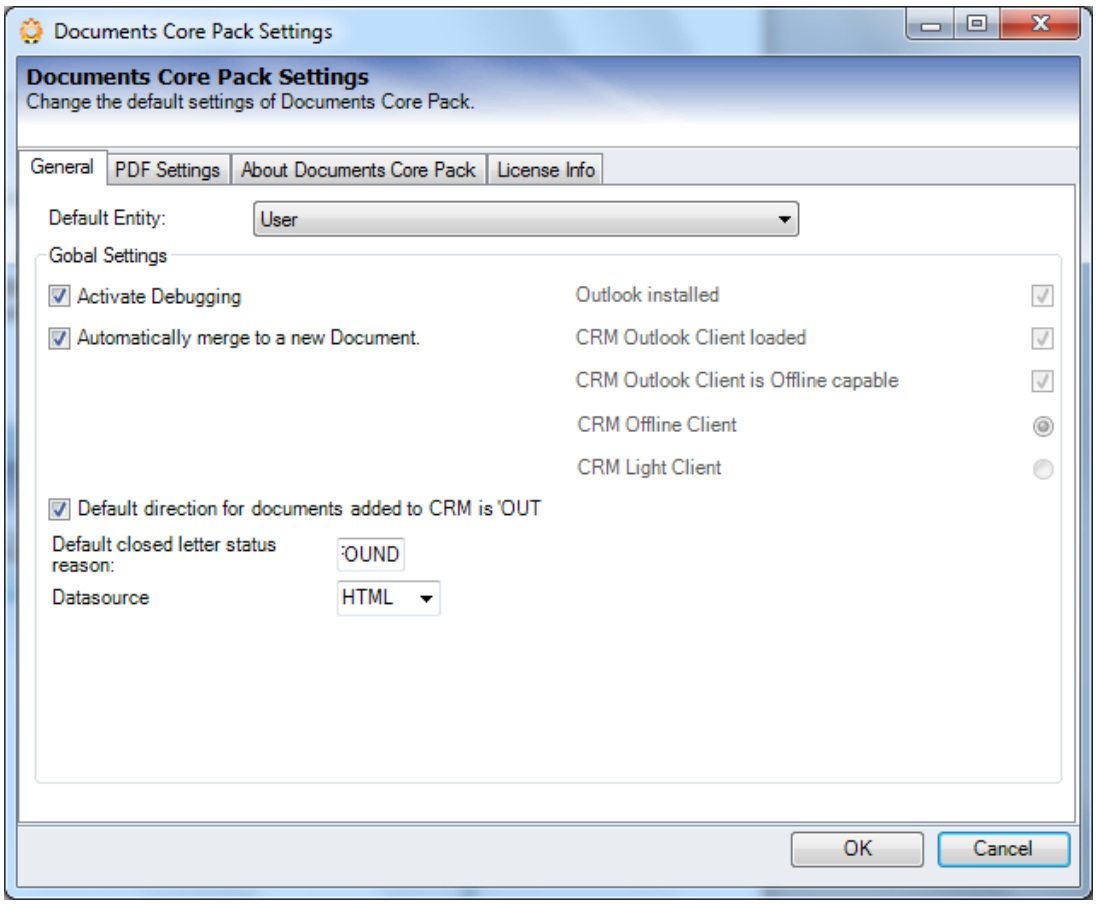


As you can see in the screenshot, the content of the mail appears in the "description" field of the activity and both files are attached.

6 Documents Core Pack Settings (WordMailMerge settings)

This chapter explains the settings of the DocumentsCorePack-Client (*MS Word->www.mscrm-addons –Ribbon->WordMailMerge Settings*). In most cases the default settings are fitting the users-requirements.

6.1 General -tab

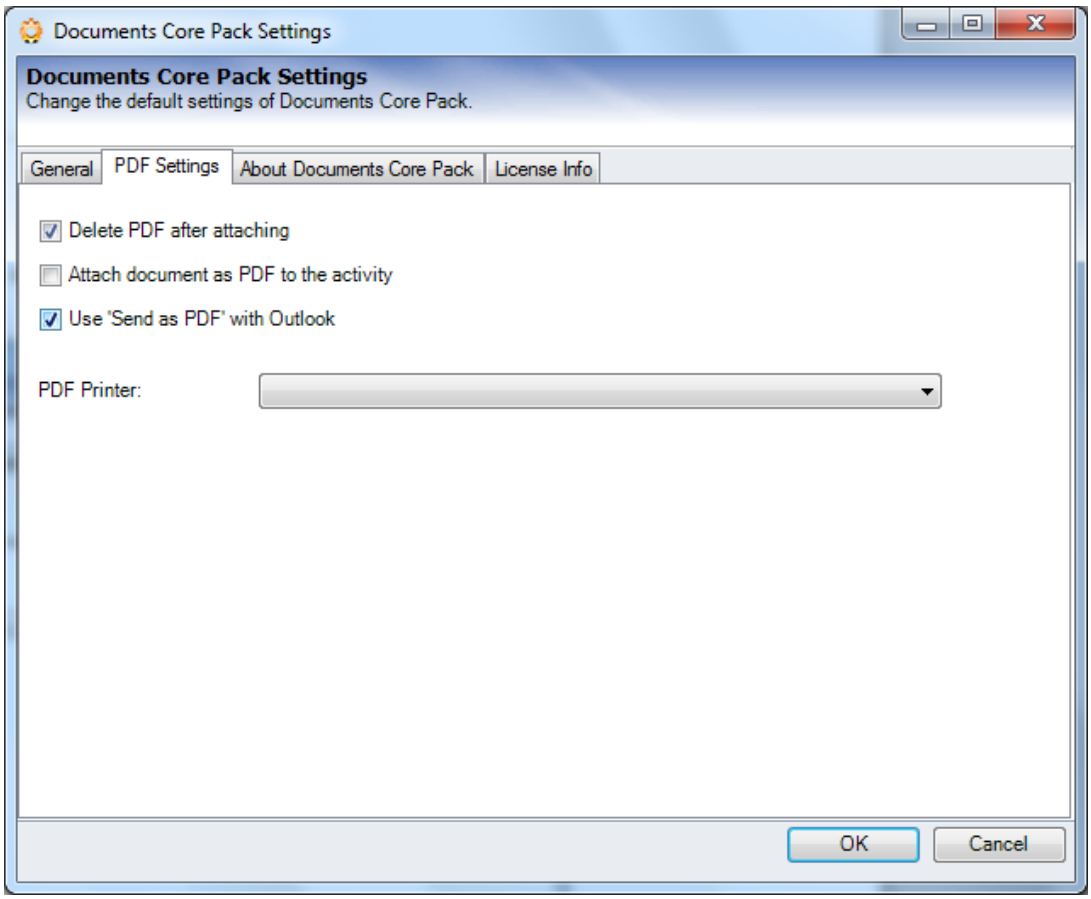


Settings:

- Activate debugging: required for support-issues only. The log-files contain detailed descriptions about what was happening in case of errors. As logging always comes with a decrease in performance, you should leave this setting deactivated unless asked by a mscrm-addons- Support team member to activate..
- Default direction for documents added to CRM is ‚Outgoing‘: Defines the default direction for created activities (letter, fax)
- Automatically merge to new Document: When checked, a new document will automaticall be generated once the data is loaded. (e.g. after hitting the Print in Word button on a quote).
- Datasource: Choose the datasource that should be used for storing temp-data.

6.2 PDF-settings

Contains some basic settings regarding the "send as PDF" – functionality (see chapter 3.4)



Settings:

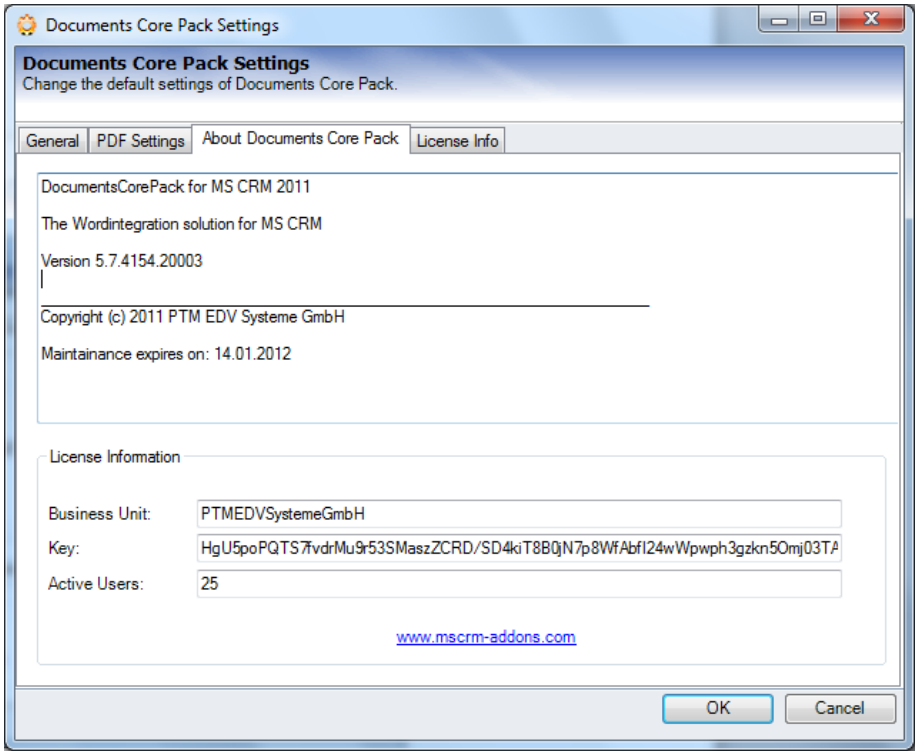
- PDF-Printer**:** Defines the PDF-printer that should be used.
  Supported printers:
  - Office 07 / 2010 – PDF-printer (**default**)
  - PDF Creator

- Delete PDF after attaching: Defines whether the temporary locally saved PDF file should be deleted after attaching the PDF to the email activity.

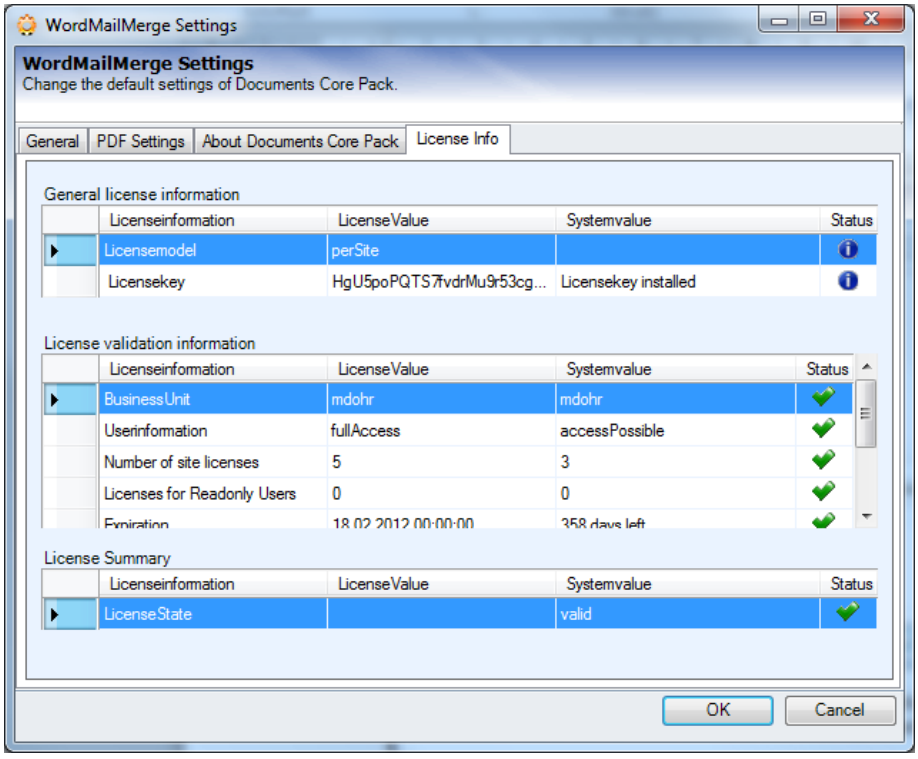
- Attach document as PDF to the activity: By default the document will be saved as a *.doc – file when using "Create CRM activity" (see chapter 3.3). This setting enables to save PDF files instead

- Use "Send as PDF" with Outlook: If checked, the document generated by the "send as pdf" –routine (see chapter 3.2), will be attached to an email in Outlook instead of an email-activity.

6.3 About DocumentsCorePack / License Info



- About DocumentsCorePack contains detailed information about the intalled version and some facts about the currently used license.



- License Info: Shows details about the license (validity, type, users)

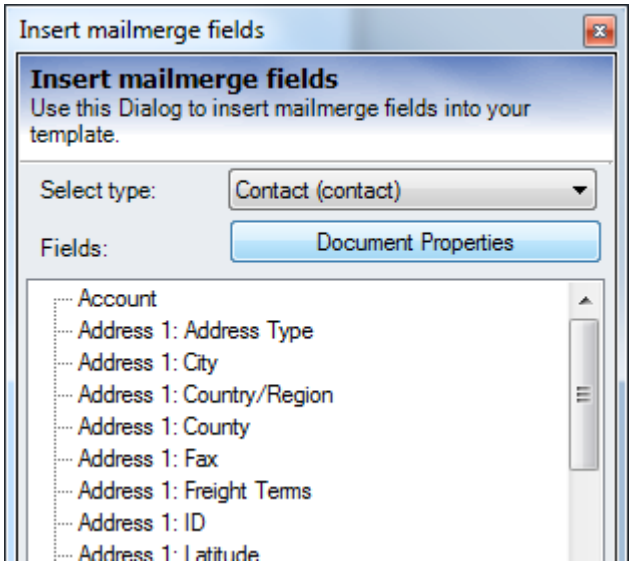
7 Document/Template Properties

Document Properties are template – specific settings that improve the use of the templates by predefining things like:

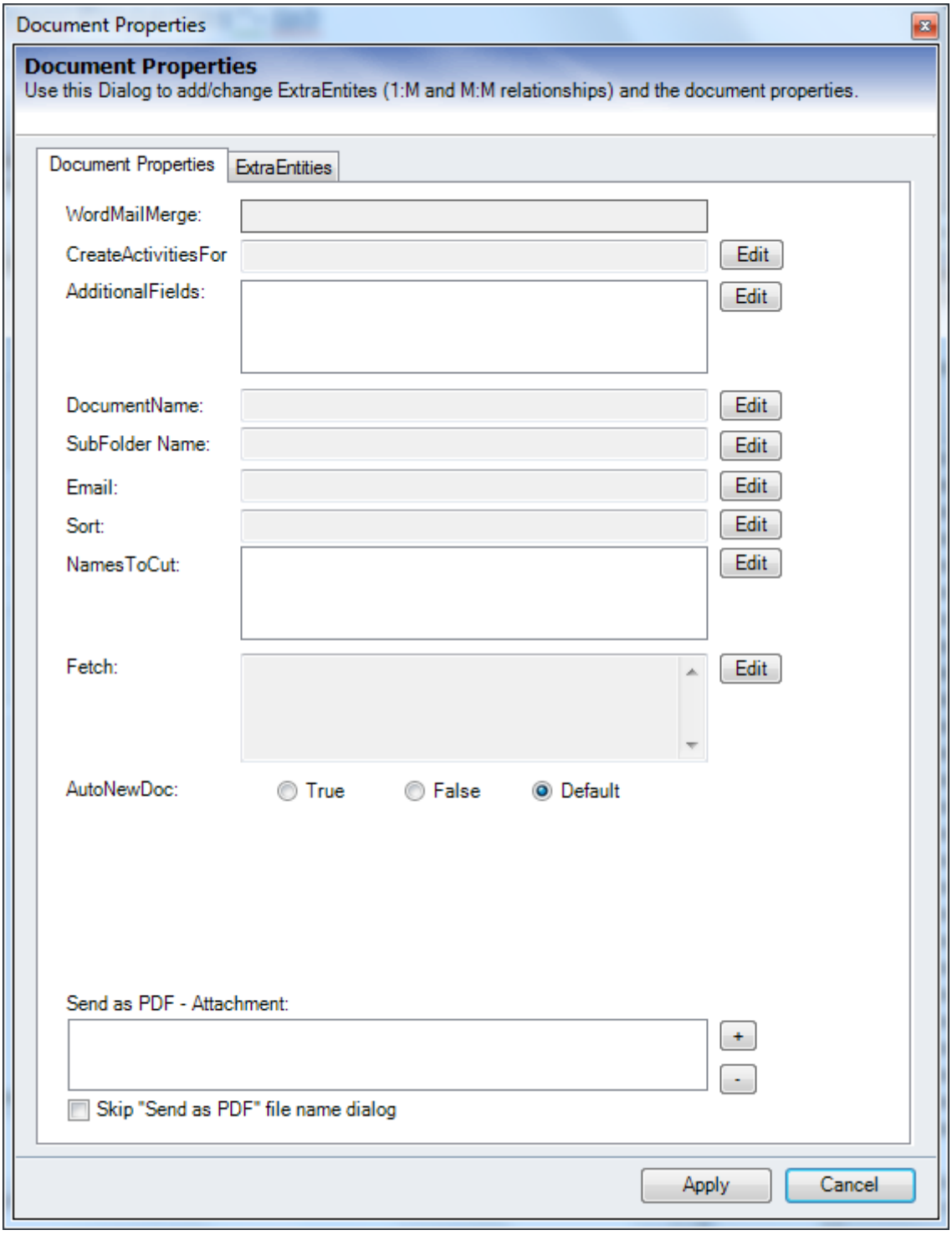
- the **document name** of the created document
- the **default save location**
- **Sort-order** of the loaded data
- **…**

How to access the document properties?

Open your Template and select *"MS Word->www.mscrm-addons-Ribbon->Insert MailMergefields"*. A dialogue as described in chapter 2.1 appears. Click on [Document Properties] to access the document properties.



7.1 The “Document Properties“ - tab



To change any DCP-Property please use the [Edit] Button!

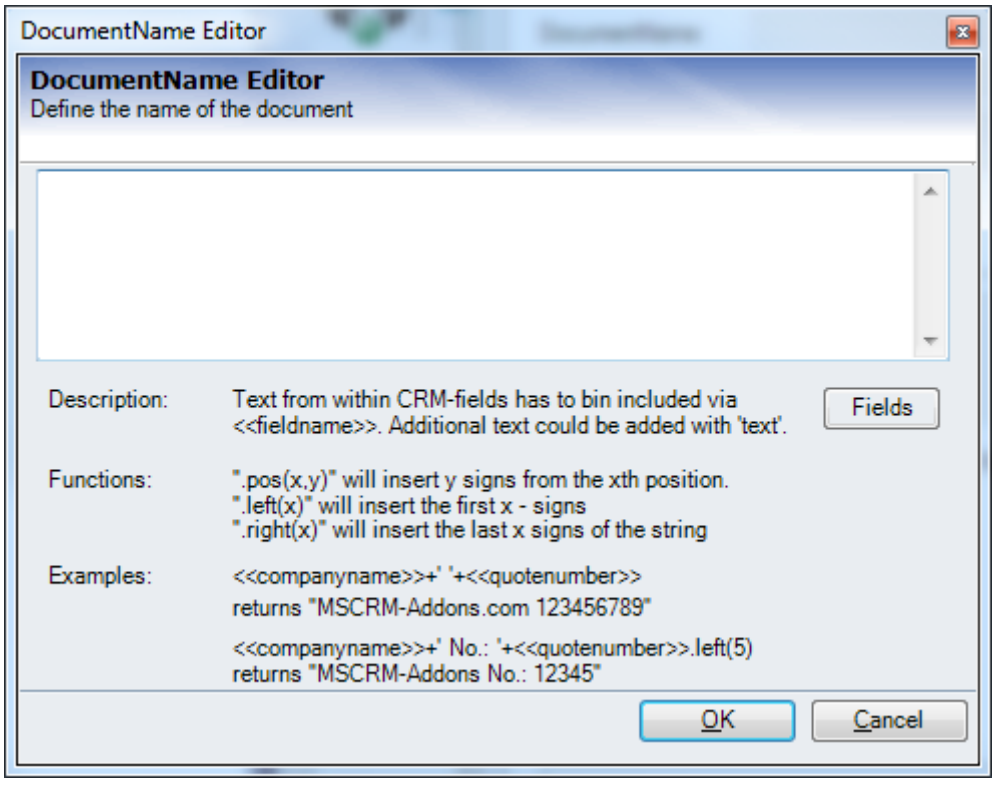
Settings:

- **WordMailMerge**: Displays the CRM-entity the template belongs to (e.g. account)

- **CreateActivitiesFor**: If you don't want to add the activity into the Main-Entity (e.g. you are merging a marketing list and want to save the activities to the contacts or accounts from in the marketing list.)
  Syntax: Entityname, primarykeyfield.
  e.g.: contact,contact_contactid -> In this case the activity will be saved to the contact.

- **Additionalfields**:
  to read out additional fields (attributes) which are not defined in the document this means that those fields are loaded into the template automatically (e.g id-fields..).
  This is very helpful e.g to send emails via Documents Core Pack and you don't want the email adress to be shown on the template.

- **DocumentName:** Here it's possible to predefine the name of the documents generated with this template. It's possible to use data from Fields out of CRM to be part of the document name. (e.g. Company+Quotenumber.doc)



  Functions:
  ".pos(x,y)" will insert y signs from the xth position.
  ".left(x)" will insert the first x – signs
  ".right(x)" will insert the last x signs of the string

- **SubFolderName**: When using the Sharepoint or FileExplorer-Integration, the documents are saved in a specific folder. This option allows to define CRM-record specific subfolders. (e.g save a quote in the standard-quote-folder + a ParentCustomer-Subfolder) (for details, see chapter 8)

- **Email**: This property allows to predefine an email attribute. Email address stored in this field will be used by all mailing procedures within DCP.

- **Sort:** This property allows to set sort-parameters for the loaded records. E.g. Sort quote-product by LineItemNumber- ascending, or sort loaded contacts by lastname – ascending.
  Syntax: fieldname collation. (e.g name A -> sorted ascending by name , D for descending)

- **NamesToCut:** In MS Word, mergefields are not allowed to be longer than 42 characters. With this setting parts of a fieldname can be shortened to work around this limitation.
  Syntax: [Text to abbreviate] – [short name], e.g. parentcustomer-pc1

- **AutoNewDoc:** If you just select one Row (of Contact, Account, a.s.o.) DCP automatically merges your Template into a doc. Sometimes you don't want DCP to do so for e.g. if you want to send it as an email. Then set this Property to **false**.
  Values: true, false, default (setting is overtaken from the Documents Core Pack settings)

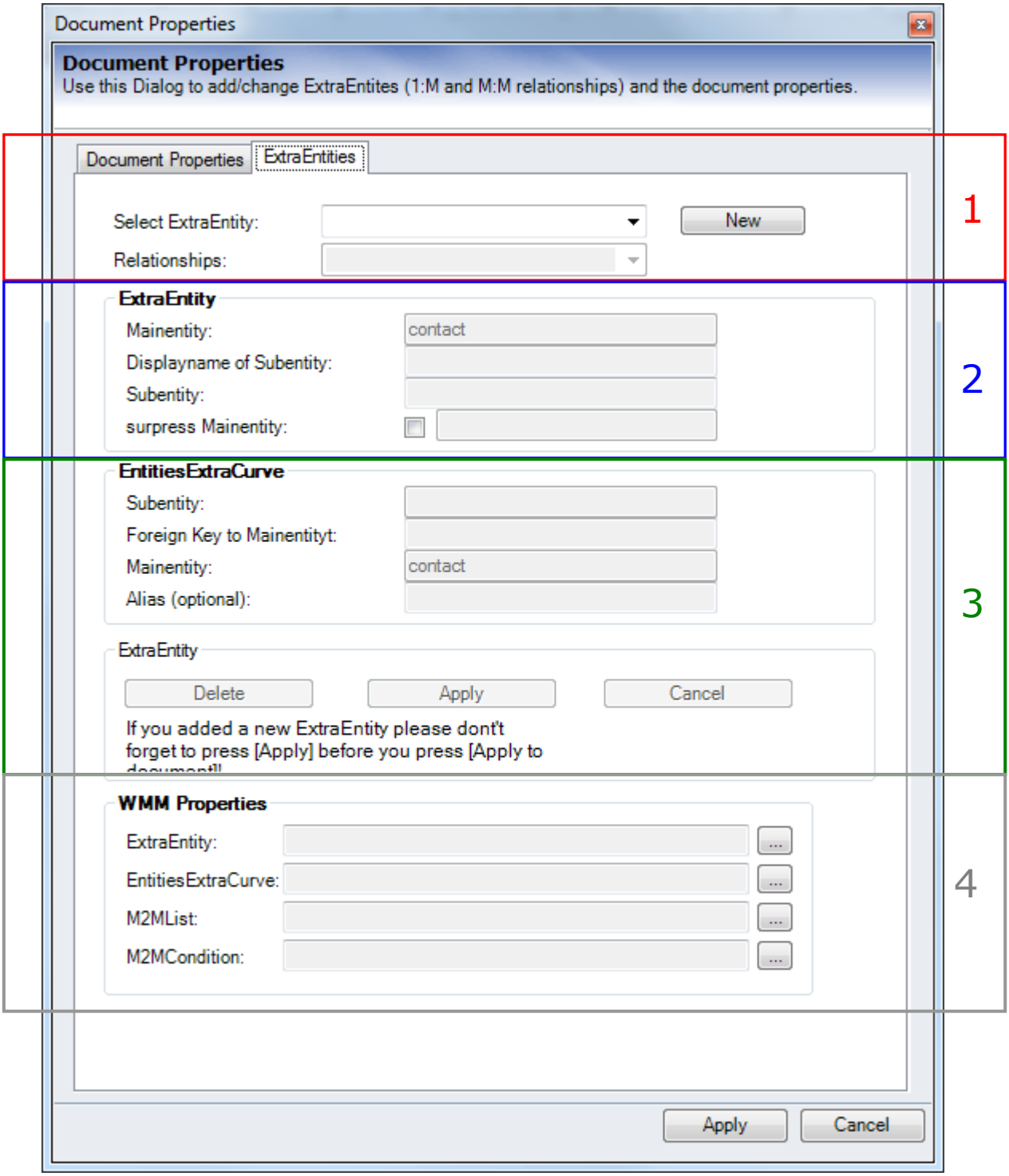
- **Send as PDF Attachment**: Here it's possible to define static attachments that should be added to the email activity. E.g. add a "Terms & conditions.pdf" when sending a quote as a pdf.

- **Skip Send as PDF –Filename dialog**: Allows to skip the SaveFileDialog when using the "Send as PDF" functionality.

7.2 The “Extra Entity” - tab

This tab allows to resolve One – to – Many relationships.
(It’s possible to create M:M relationships too, but this is quite complex and requires help from our support team members)

Basically this tab is seperated into 4 areas:



1;Select / Create relationship

In this section its possible to select an existing Extra Entity by choosing one out of the Listbox.
To create a new one press [New] and select one of the given Relationships in the drop-down listbox.
Its also possible to create a new relationship from scratch (only for enhanced Users).

After this you are in the "edit-Mode", this means that the tree button [Delete], [Apply] and [Cancel] are now active and also some Fields from the sections below are active.

2;Groupbox ExtraEntity

* Displayname of the Subentity: That's the DisplayName of your "new" Subentity, as it will be shown in the Tree.

* Subentity: the entity you want to show in the Tree

* surpress Mainentity: (this field is the same as 'Foreign Key to Mainentity' of Groupbox EntitiesExtraCurve - so please prefill this field.) Check the box if you don't want to show the Mainentity in the new Subentity. For e.g. You want to add Product-details to entity product. If you don’t check the “surpress mainentity” option, the field Product will be shown again in the “product details”- submenu.

3;Groupbox EntitiesExtraCurve

* Subentity: the Entity you want to show additional in your Tree

* Foreign key to Mainentity: the Attribut which is the Key to the Mainentity. (in XML: Referencingattribute)

After you have filled in all the fields you can press [Apply] to add this 1:M Realtionship to the:

4;DCP Properties Groupbox

* ExtraEntity: This DCP-Prop is used to show the additional Entity in the Tree

* ExtraEntityCurve: This one defines how the Data is fetched out of CRM

* M2MList: This is to create/add M:M Relationships by hand!

* M2MCondition: Field to add special Conditions to M:M relationships

8 Configure save-locations (Sharepoint/FileShare paths)

This chapter contains a detailed description about how to predefine SaveLocations for generated documents with the "Document Properties" (chapter 6).

e.g. It is possible to define a quote template to automatically save it into the "Parent-customer"-share with the Quote-number as the filename.

The path to which merged documents are saved depend on two settings:

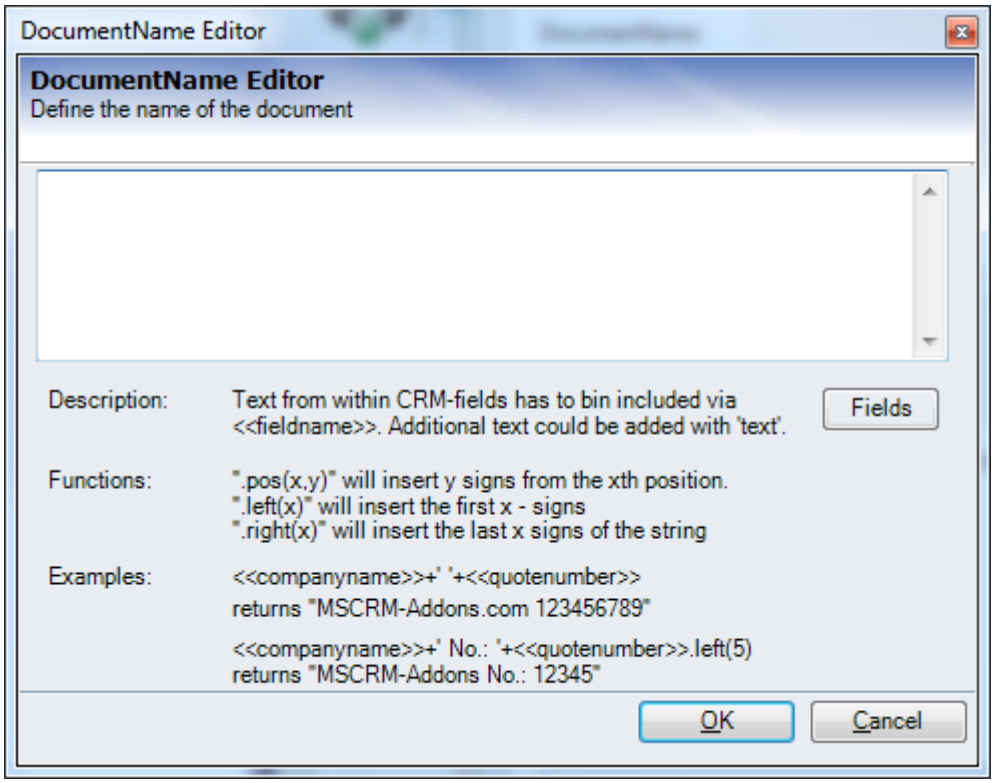
1) **Documents Core Pack Server Configuration (Server)**

   Here it's possible to define root-paths for all entities. (e.g Contact,Account)
   So all documents created for the entity e.g Contact will be saved to the Contact-root unless no subfolder is defined on the client side.

2) **Document Properties (Client)**

   In the document properties of the template (see chapter 6.1), you can find a setting called "**SubFolder Name**" which allows you to specify a subfolder for the created document.

   With a click on [Edit], you'll see the following window:



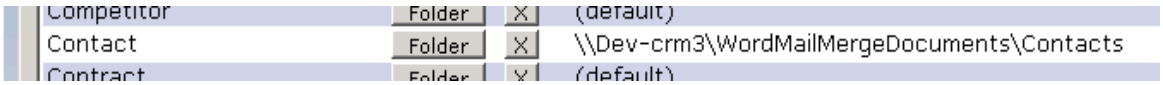
Please see (*DocumentName in chapter 12) for a detailed description on this editor.

Examples:

1. **We will create a gift certificate for a contact and save it to a new folder for the contact :**

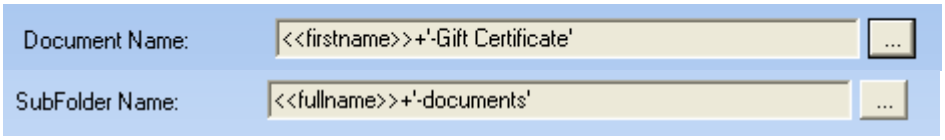
   - Server-Settings

     The gift certificate is a template for the Contact entity, so the Fileshare/Sharepoint –root will be taken from the depending servers setting:



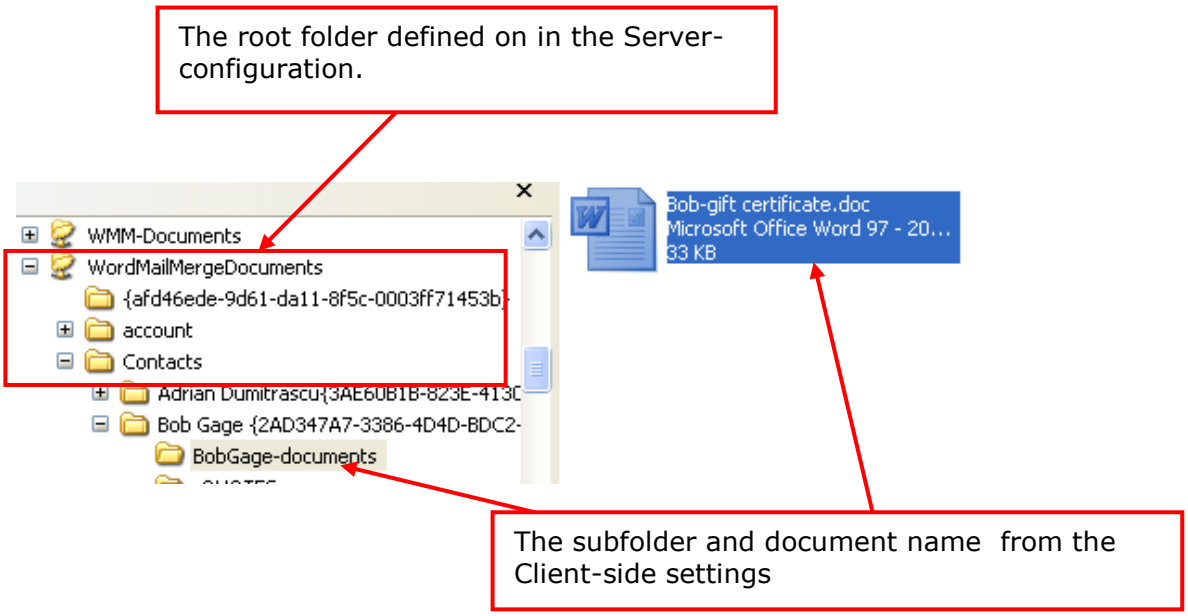
   - Client-Settings:

     In the Document-Properties, we can define a subfolder-name and a document name for the created Gift-certificate.



   - Result:

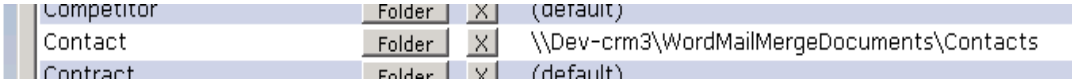
     The settings described above result in following document path on the fileshare



2. **We will generate a quote and save it to the PrimaryContact on the FileShare.**

   - Server Settings:

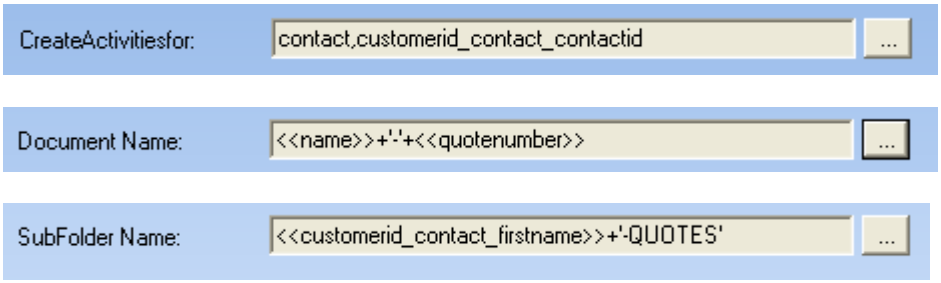
     As the document will be created for the entity "Contact", the root folder will be taken from the Contact-Setting rather than the Quote-setting in the Documents Core Pack Server configuration.



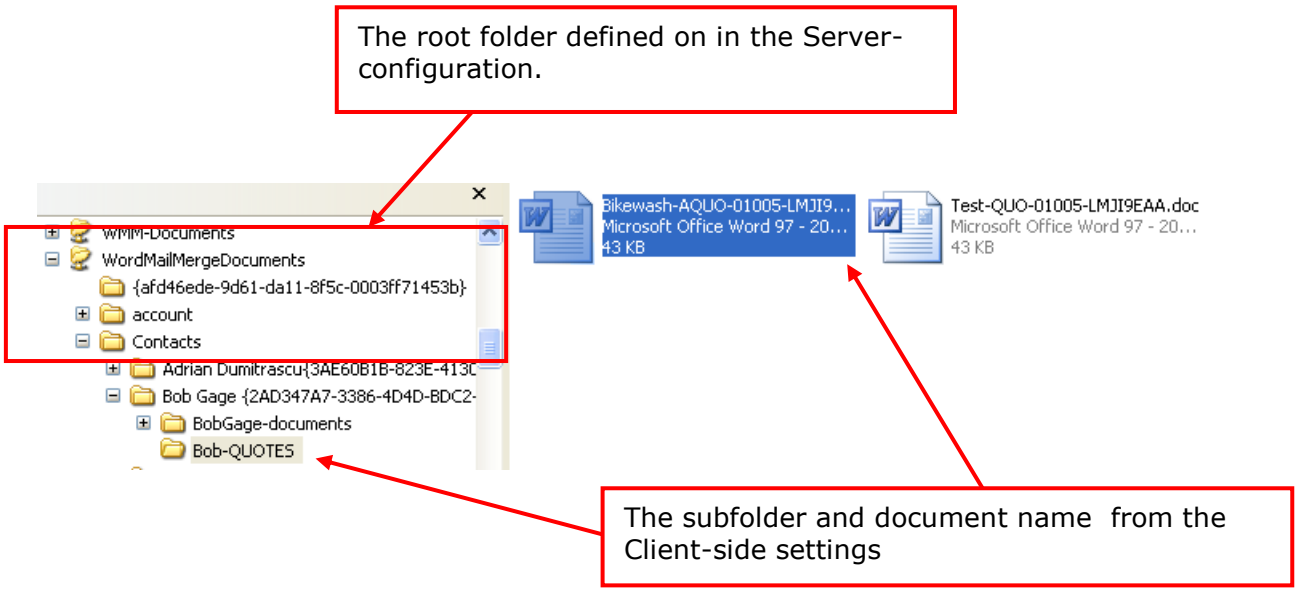
   - Document Properties:

     In this case we have to use the "Create Activities for" –option as the quote should not be saved to the Quote-folder.

     Therfore the client side settings have to look like this:



   - Result:



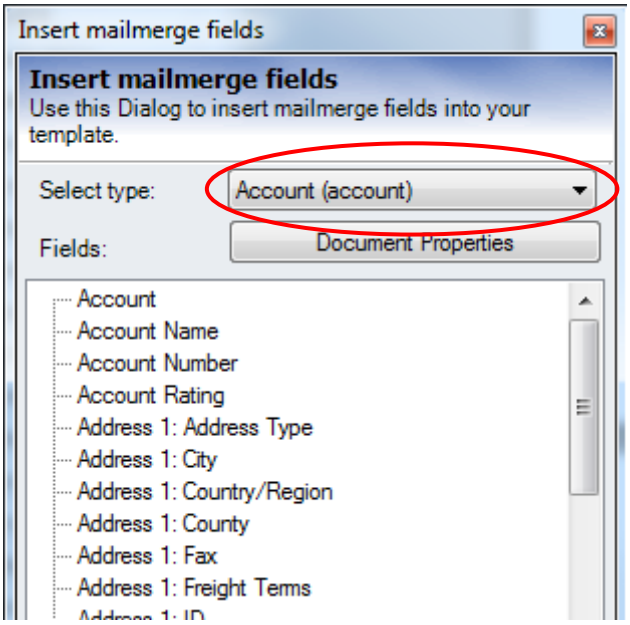
NOTICE: This operations are equal on the Sharepoint!
(see Implementation GUIDE 1.5.4)

9 Resolve an additional Relationship – Step by Step

With the option to define "One to Many" and "Many to Many" relationships its possible to link entities together and load data from both into the MS Word document.

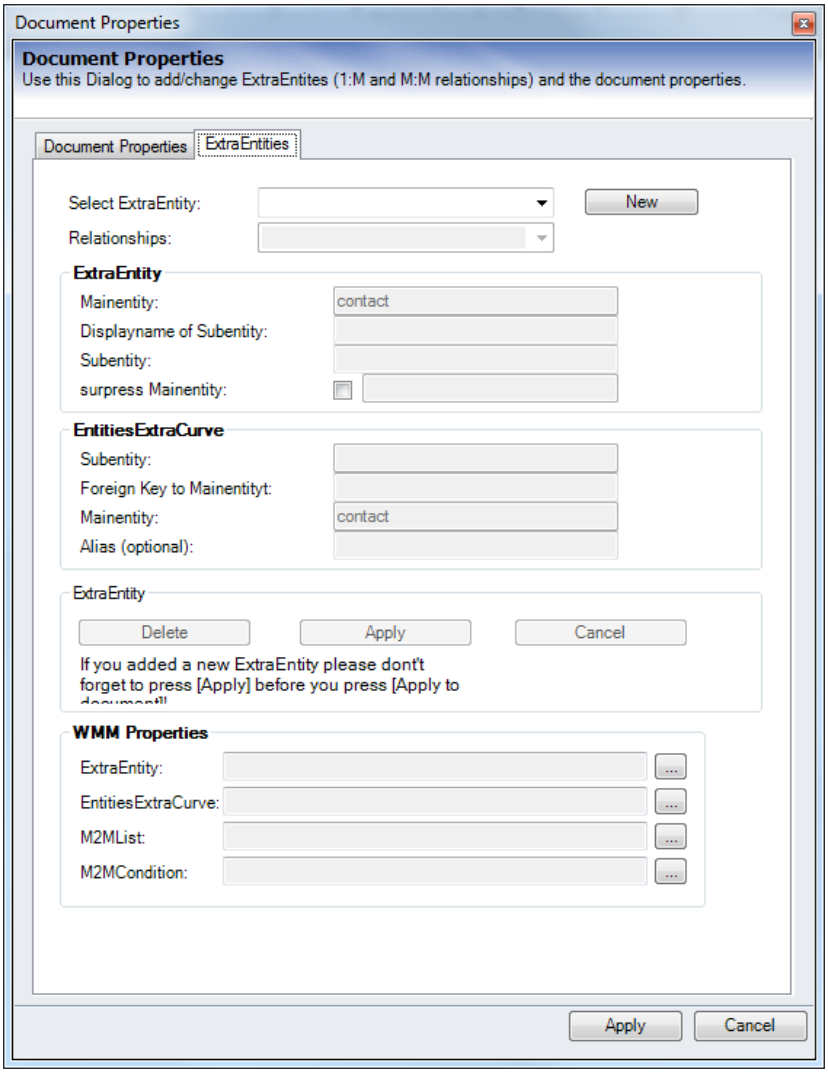
In our example we define a relationship which allows us get all orders that are saved for an account.

Step 1: First you have to click on "Documents Core Pack for MS CRM"->"InsertMailMerge fields" and choose the entity you want to define a relationship for



Choose the entity to resolve the relation for. (in our case its account->salesorder)

Step 2: After that, we proceed with a click on „Document Properties and switch to the „Extra Entity tab“ (see chapter 6.2)

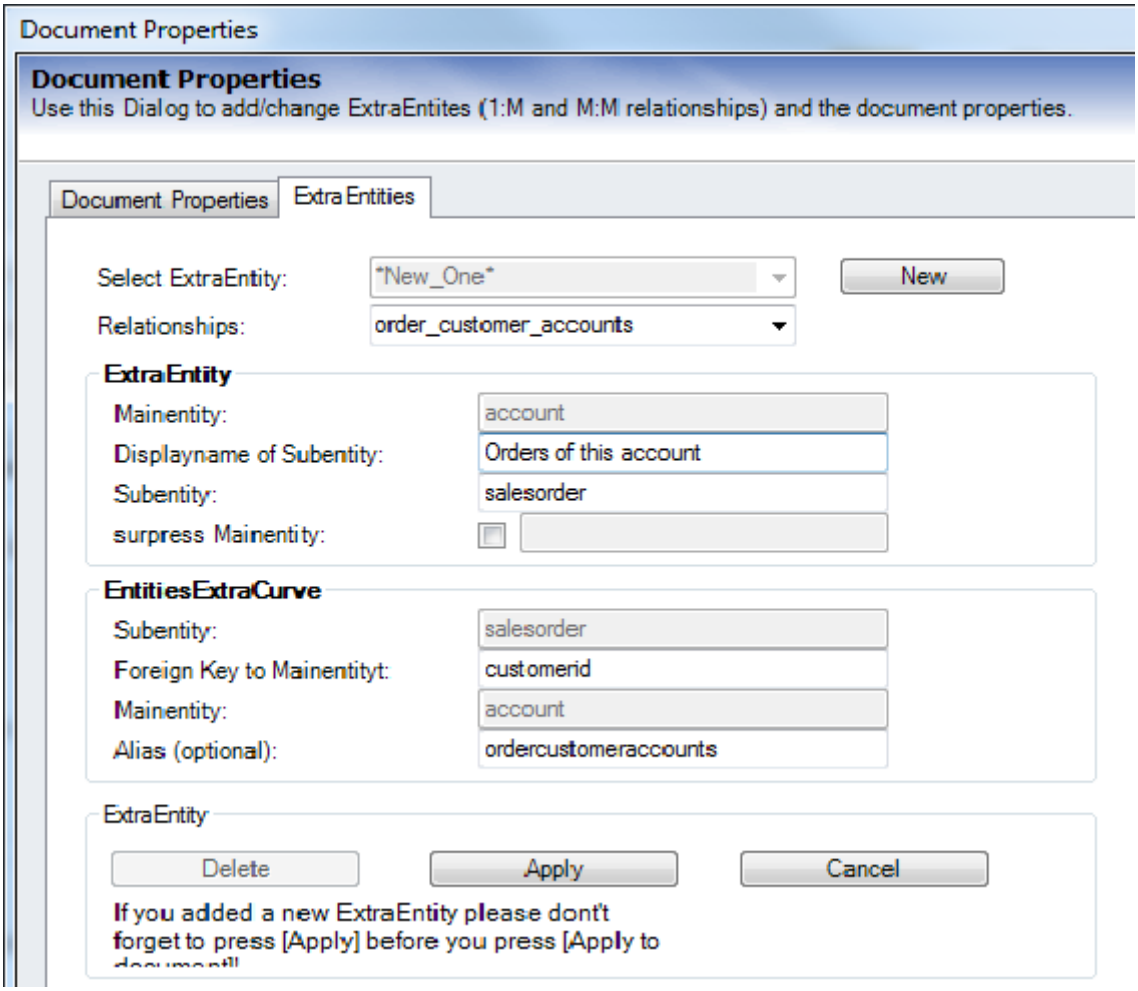


To add a new relation we need to chooce the Entity/Relation we want to add. Therefore we proceed with a click on “New”.

You are now in the "edit-Mode", this means that the tree button [Delete], [Apply] and [Cancel], as well as some of the form fields are active and we can start defining the account->order relationship.

Step 3: Choose relation

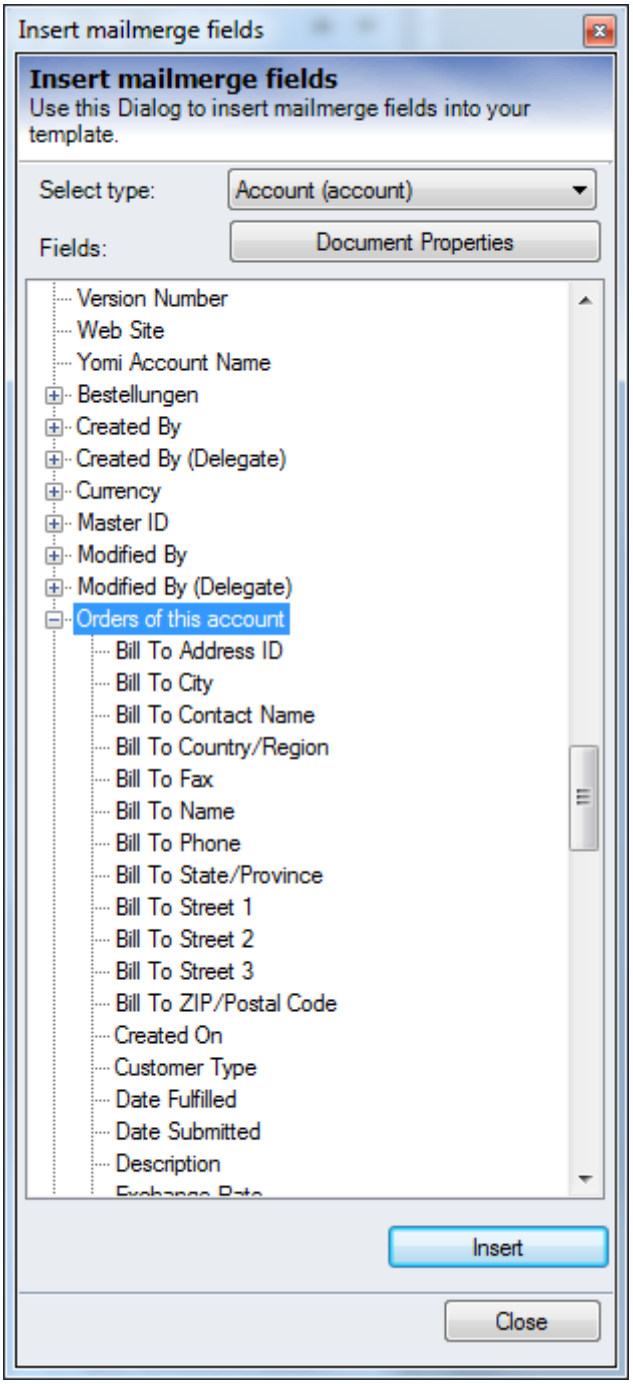
The combobox allows to choose Any relation defined within MS CRM.



The most fields get filled automatically. All we have to do is add a DisplayName for the new Relation. In our example this is “Orders of this account”

Step 4: After filling all fields we can proceed with a click on "Apply" and finally „Apply" all Relations and properties to the word document.

Now we can see a new entity "Orders of this account" in the list of the available fields for entity account and therefore use it to load data of the orders into the template



10 CRM-internal features

DocumentsCorePack provides some useful additional features that improve the user-experience within MS CRM 2011

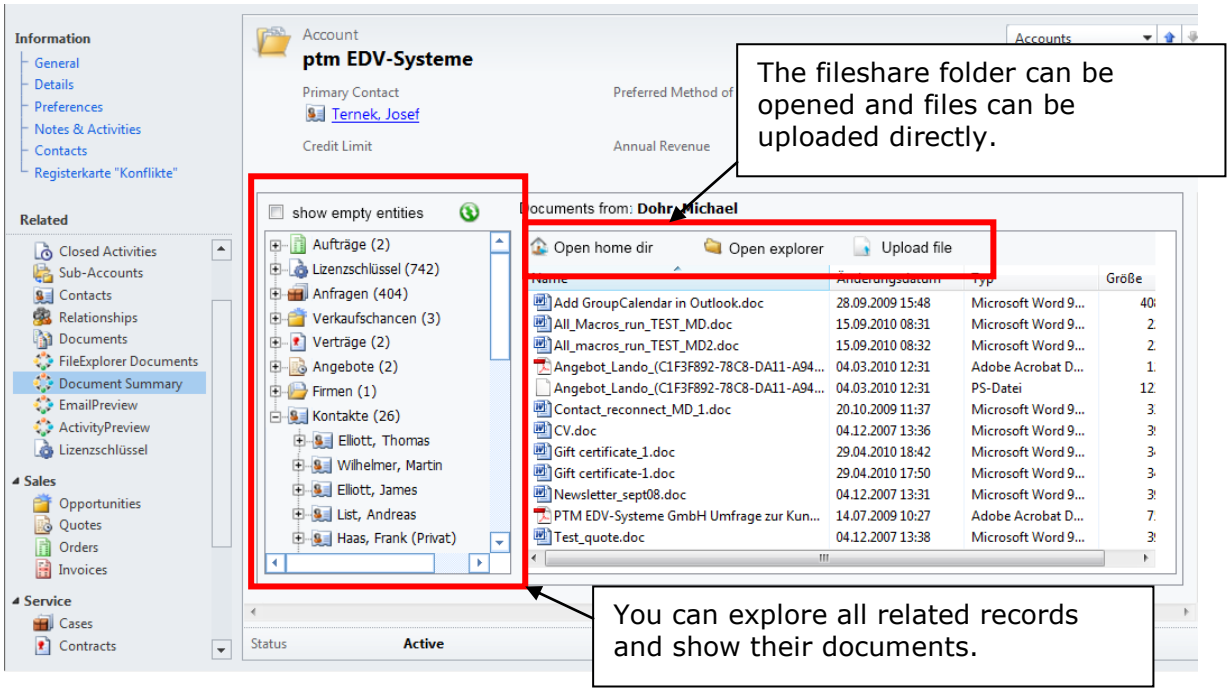
Those features are:

1) DocumentSummary
2) LineItemCount (**Planned feature, not available in early versions of DCP for MS CRM 2011**)

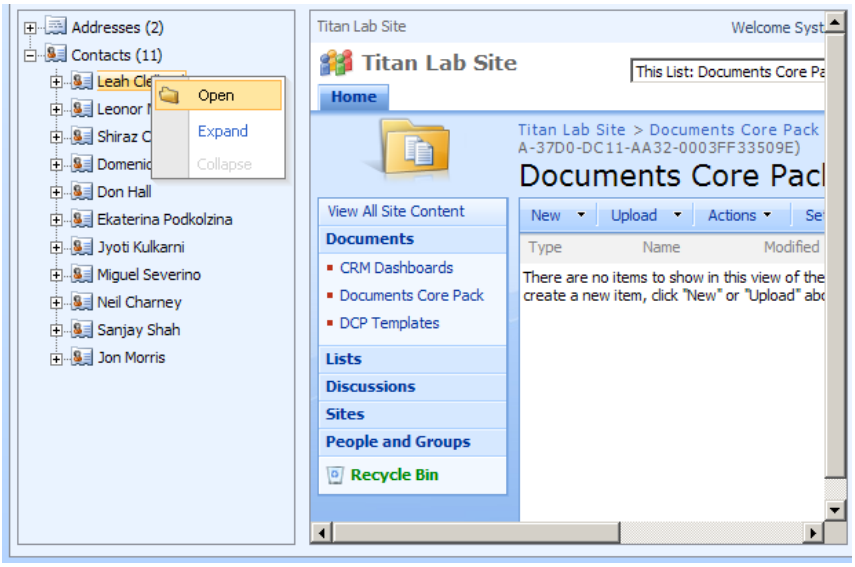
Documentation on how to activate and configure both of the following points can be found in our implementation guide for Documents Core Pack 2011 (server).

10.1 Document Summary

Enables you, to show up documents saved to related records within CRM.
With Document-summary activated (configuration see Implementation guide chapter 1.3.6) you'll see a new navigation item in the side menu.



You can click on a e.g contact to see the documents to this record.
The right click menu on each node provides the opportunity to open up the entity or expand/collapse the tree.



The tree is recursive. This means, that you can expand the tree downwards unless you reach the point where no further entities are related.
e.g. open an account, expand the contacts, expand the invoices of a contact and so on.

Additionally, all the documents can easily be opened via double-click from within the Document Summary

11 Contact

If you have got problems with this product, please consult our Knowledge-Base at http://support.mscrm-addons.com ,

Or contact us:

Email: support@mscrm-addons.com
Tel.-Nr.: +43 316 680 880 0