WordMailMerge for MS CRM 3

Version 2.39 (server)

Implementation Guide
(How to install/uninstall,..)

Implementation Guide for WordMailMerge 2.39(server).doc

Table of Contents

1   Installing of WordMailMerge

Before installing WordMailMerge, please read this document and follow the steps carefully.

After successful installation please read the "Users Guide" which will be installed with the "WordMailMerge Client".

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

- Maintaining and configuring SQL Server databases
- Maintaining and configuring IIS based Web Sites / Applications
- Maintaining and configuring a Microsoft CRM Server

The installation consists of the following steps:
Follow each of the following steps, to complete the installation:

1. Installing the server components of WordMailMerge
2. Configuring the CRM system
3. Installing the client components of WordMailMerge
4. Configuring client security

1.1   Installing the server component

The server component of WordMailMerge provides you with the capability to start a mail merge form the MS CRM Web Client.
The WordMailMerge Server Component has to be installed on the server where MS CRM is running.
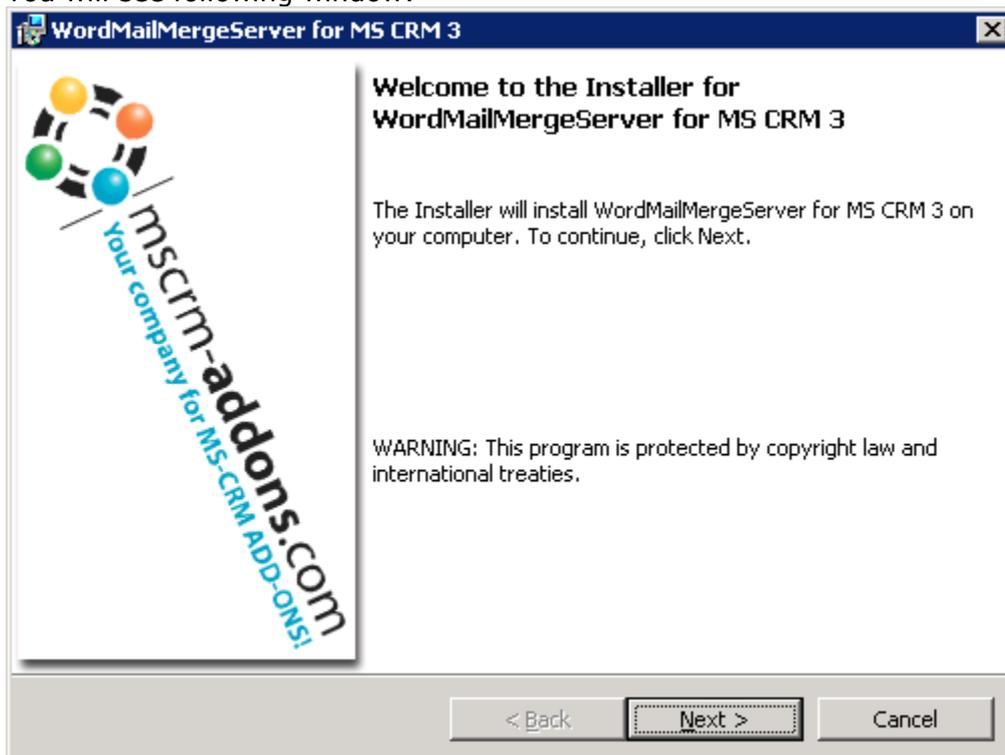
If the WordMailMerge server- component has allready been installed, go on with 1.1.2 Upgrade.

1.1.1   Install from scratch
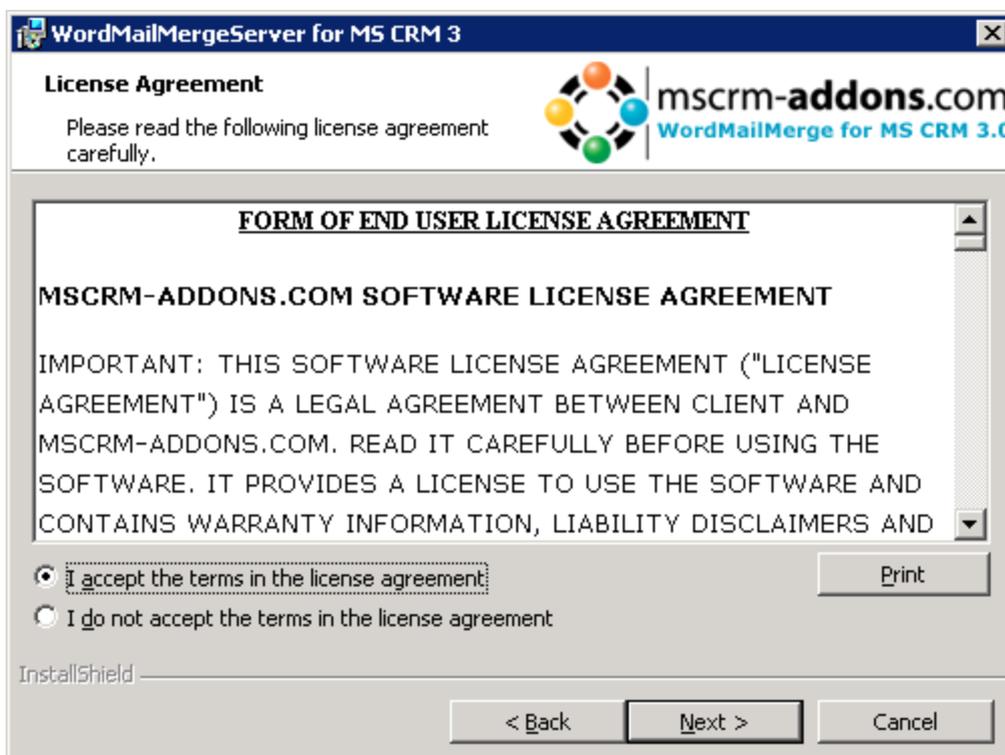
To complete this task:

1. Run the "WordMailMerge Server for MS CRM 3.msi" Setup file.
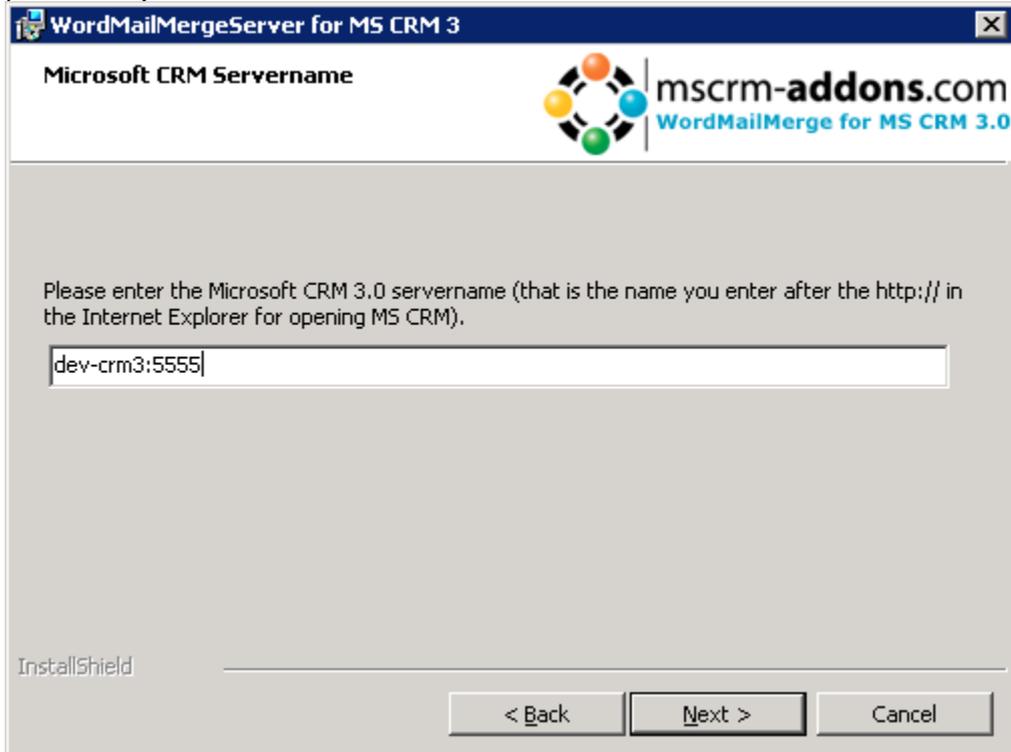
2. You will see following window:

Click Next>

3. EULA (End User License Agreement). To proceed, you'll have to accept the license agreement.

4. You have to enter the name of the CRM-Server on the following screen. Don't forget the portnumber if its not 80 (e.g servername:dev-crm3 , port:5555)

5. Next you have to choose if you want to use https. Leave unchecked if you don't use https.
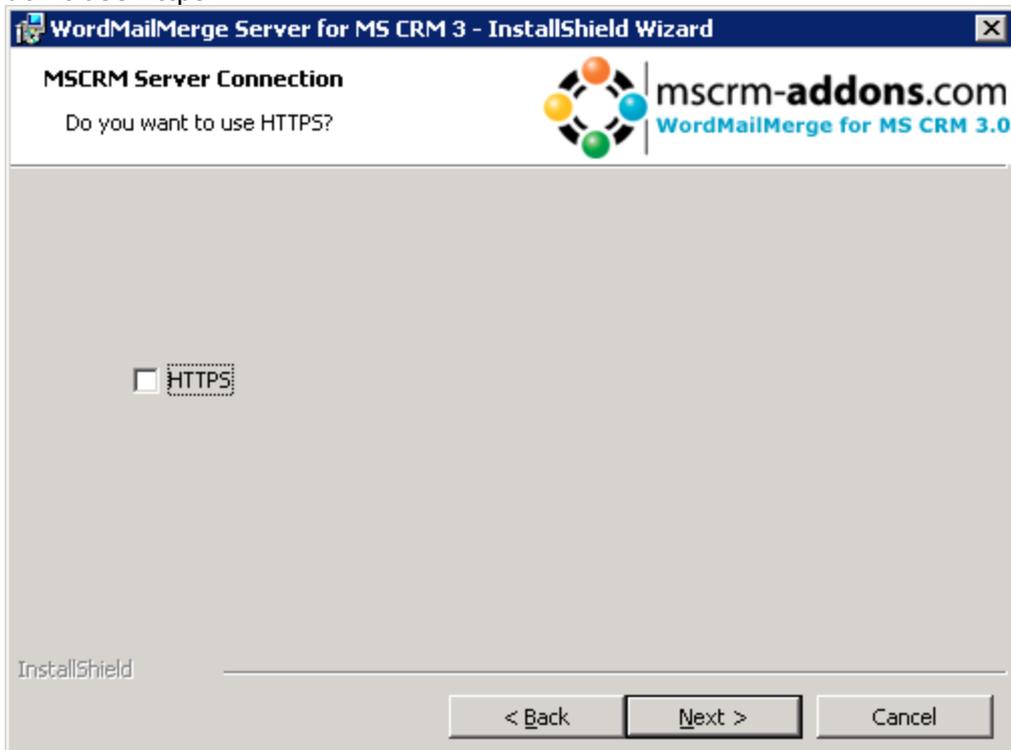
6. CRMMailMerge Server – Installation Folder

CRMMailMerge Server only installs a few Files on your Server and then creates an Virtual Directory in the IIS.

7. Confirm Installation
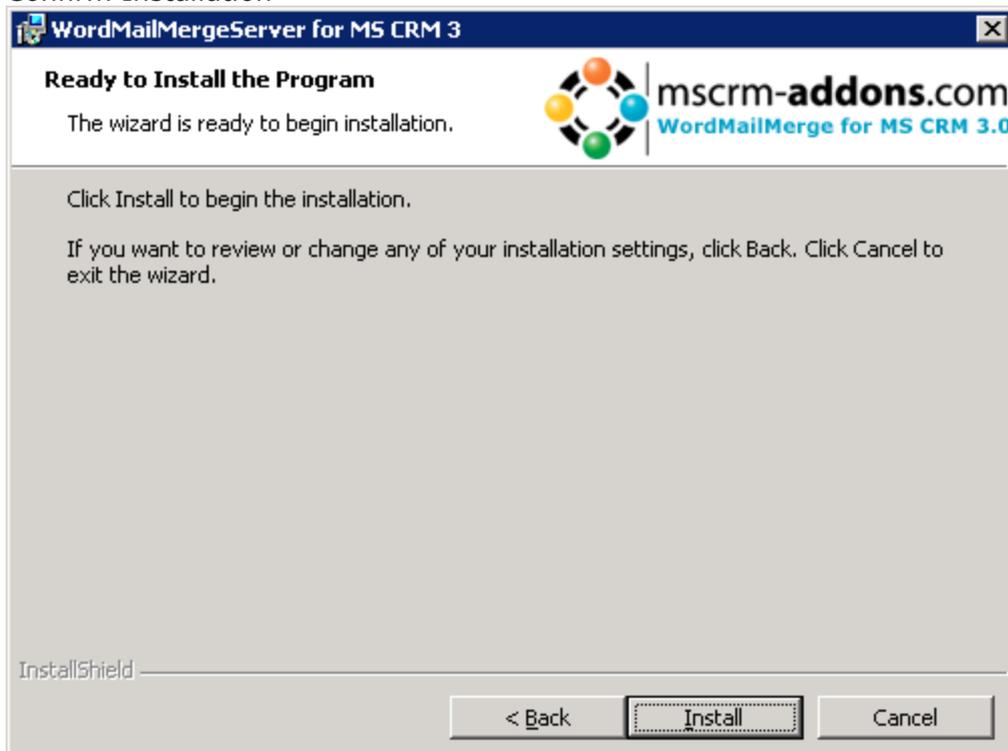
After Click on the Next Button the Installation begins.

8. After the installation ended you have to click on the "close" button

9. After installing the Server compoenent the WordMailMergeServerConfig.exe will be opened automatically.

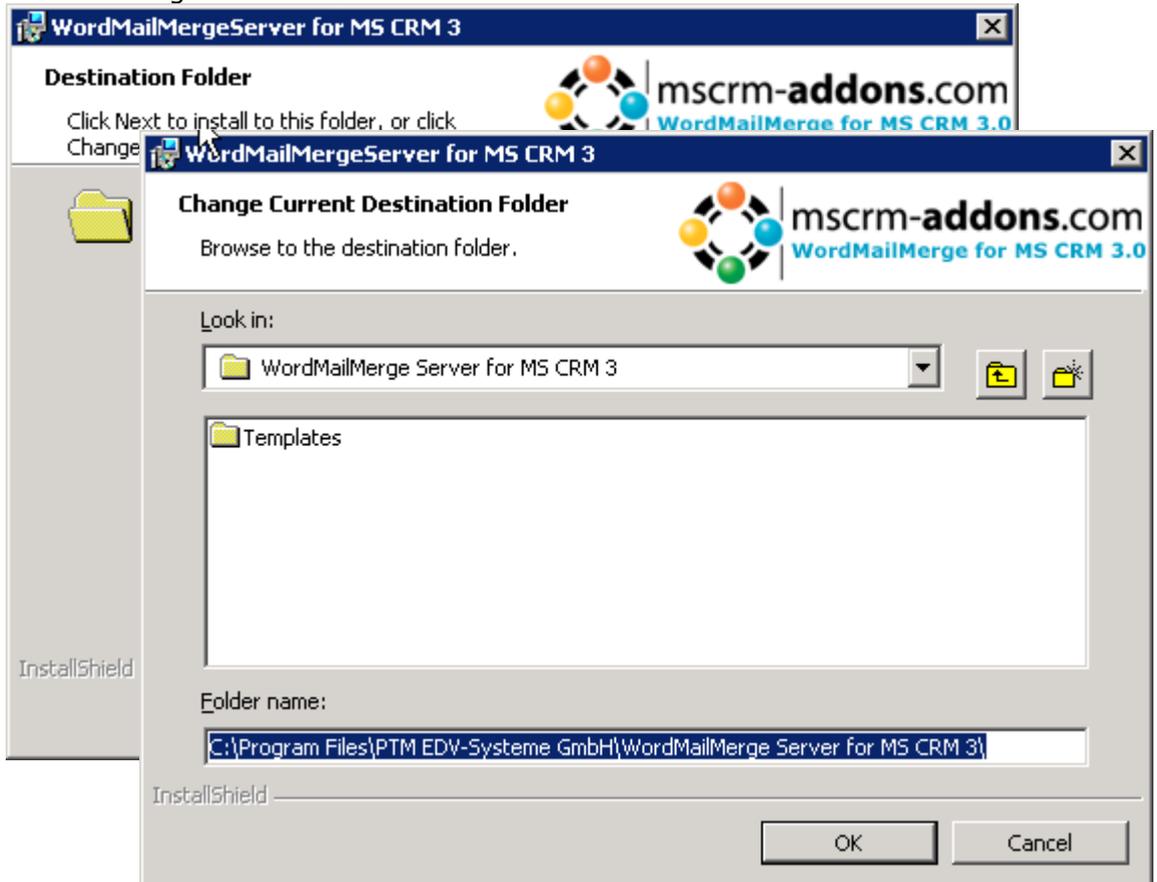   Its also possible to start the exe via

   -Start->All Programs->www.MSCRM-Addons.com->
   WordMailMerge for MS CRM 3.0->WordMailMergeServer Configuration

   -..\\Program Files\PTM EDV-Systeme GmbH\WordMailMerge Server for MS CRM 3 \config\WordMailMergeServerConfig.exe

If everything goes right, you will see…

* a new Button on each Objects you checked in the WordMailMerge Server Config

1.2 Upgrading the Server component

To avoid uninstallation of the server component, its possible to perform upgrades without uninstall. Furtheron, all settings (CRM-servername,https,installation directory) will remain in System.
After running the "WordMailMerge Server for MS CRM 3.msi" as usual, following window will appear:

The .msi detects previous installations automatically

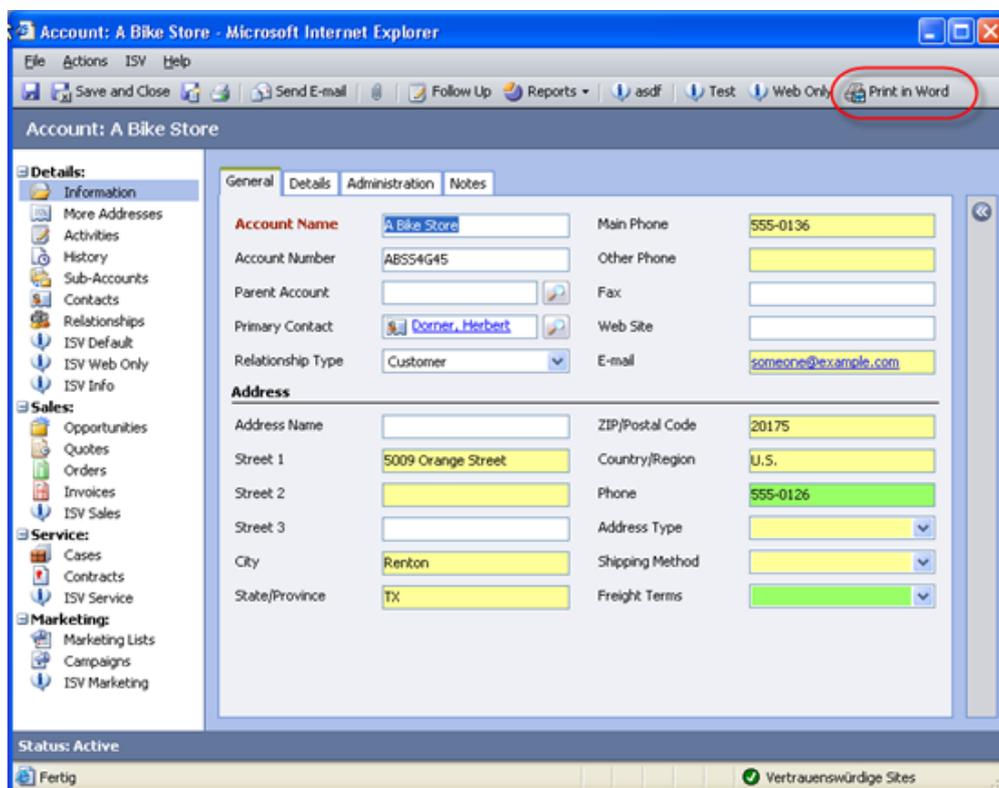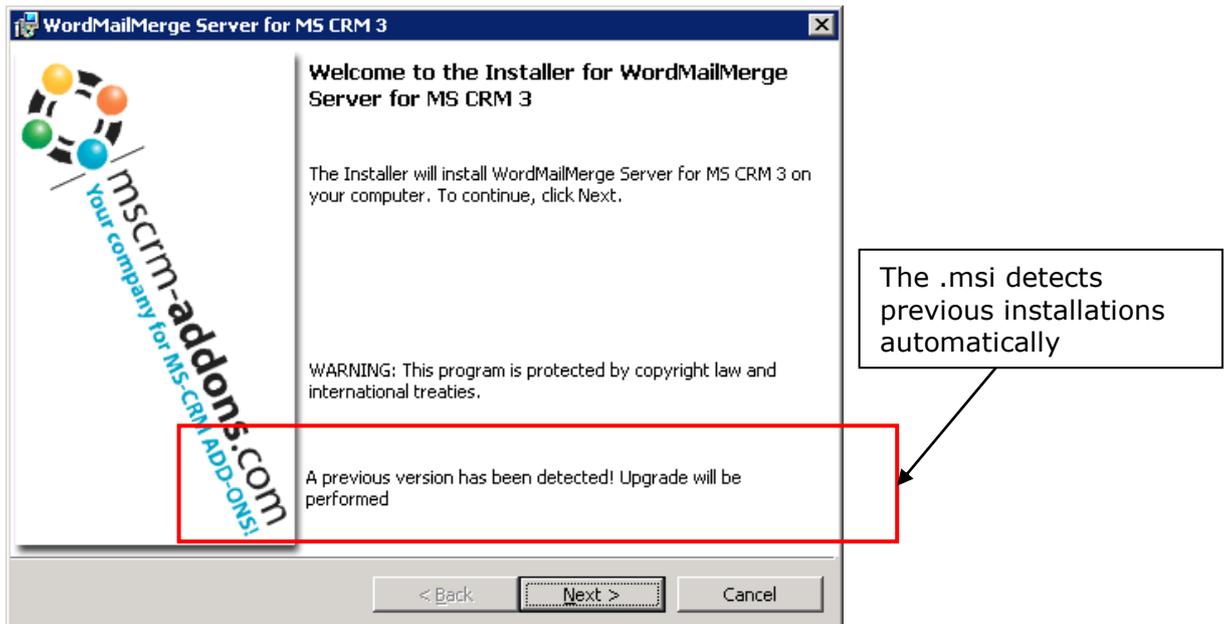## 1.3 WordMailMerge Server configuration

Its possible to open the WordMailMergeServerConfig.exe via

->Start->All Programs->www.MSCRM-Addons.com->
WordMailMerge for MS CRM 3.0->WordMailMergeServer Configuration
or
..\\Program Files\PTM EDV-Systeme GmbH\WordMailMerge Server for MS CRM 3
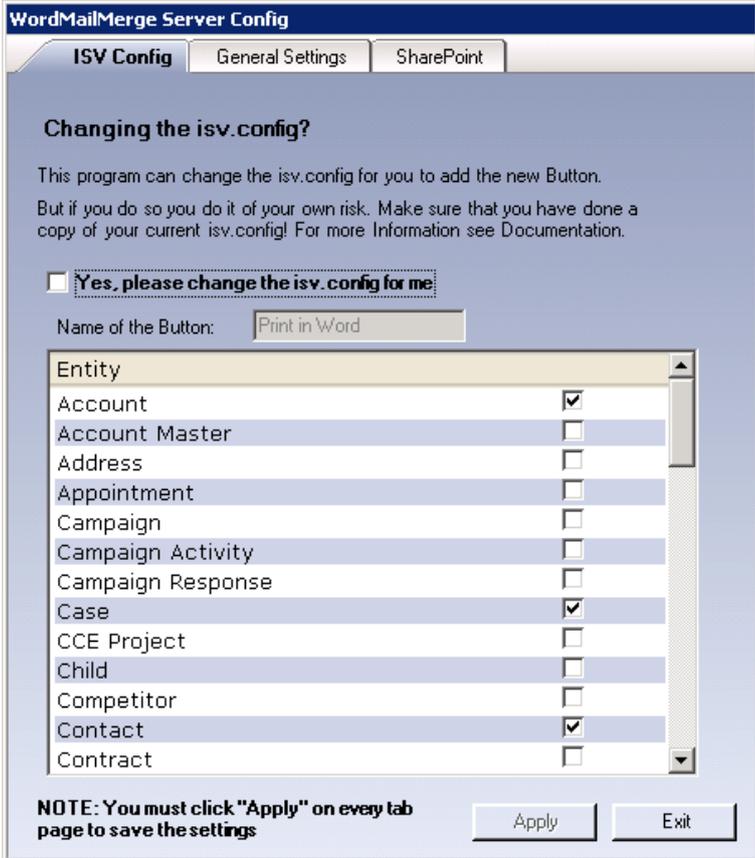*\config\WordMailMergeServerConfig.exe*

Basically there are two possibilities to handle documents created with
WordMailMerge:
1. *File Explorer: To save documents in a fileshare on the server*
          (see 1.3.3)
2. *SharePoint: To save documents on a Sharepoint (see 1.3.4)*

1.3.1 ISV Config

Here its possible to choose the entities where the "Print in Word" button should appear in CRM.

If you say YES, then WordMailMerge Server Config creates a copy of the original and changes the isv.config for you.

Select each Object where you want to add the new Button. The Name of the Button can also be given.

1.3.2 General Settings

1) **MSCRM Server**
   Enter CRM servername and portnumber in here (e.g. in our example the **servername is danubecrm** and runs via **port 5555**

2) **HTTPS**
   Check here if you want to run WordMailMerge via https. You have to copy your certificate into the installation directory of WordMailMerge Server. The file must be named "clientcert.cer"

3) **Templates**
   Here it's possible to define the location of the WordMailMerge templates SharePoint has to be deactivated in order to modify this setting (see chapter 1.3.3 ->1)

4) **Language**
You can choose the language in the dropdown-box. Languages are listed in language code (en for English, de for German)
To add another language please see chapter (1.5)

5) **Debug**
Leave unchecked. This option is used by our Support to simplify bug fixing.

6) **Names to Cut**
For detailed in formation see chapter 1.5.3

7) **Additional Entities**
WordMailMerge only shows customizeable entites by default.
If you want to use other entities for WordMailMerge you have to define them in here.

Ad 6 & 7: To add entities, click on the [..]-icon. A new window will appear which allows you to insert entities.
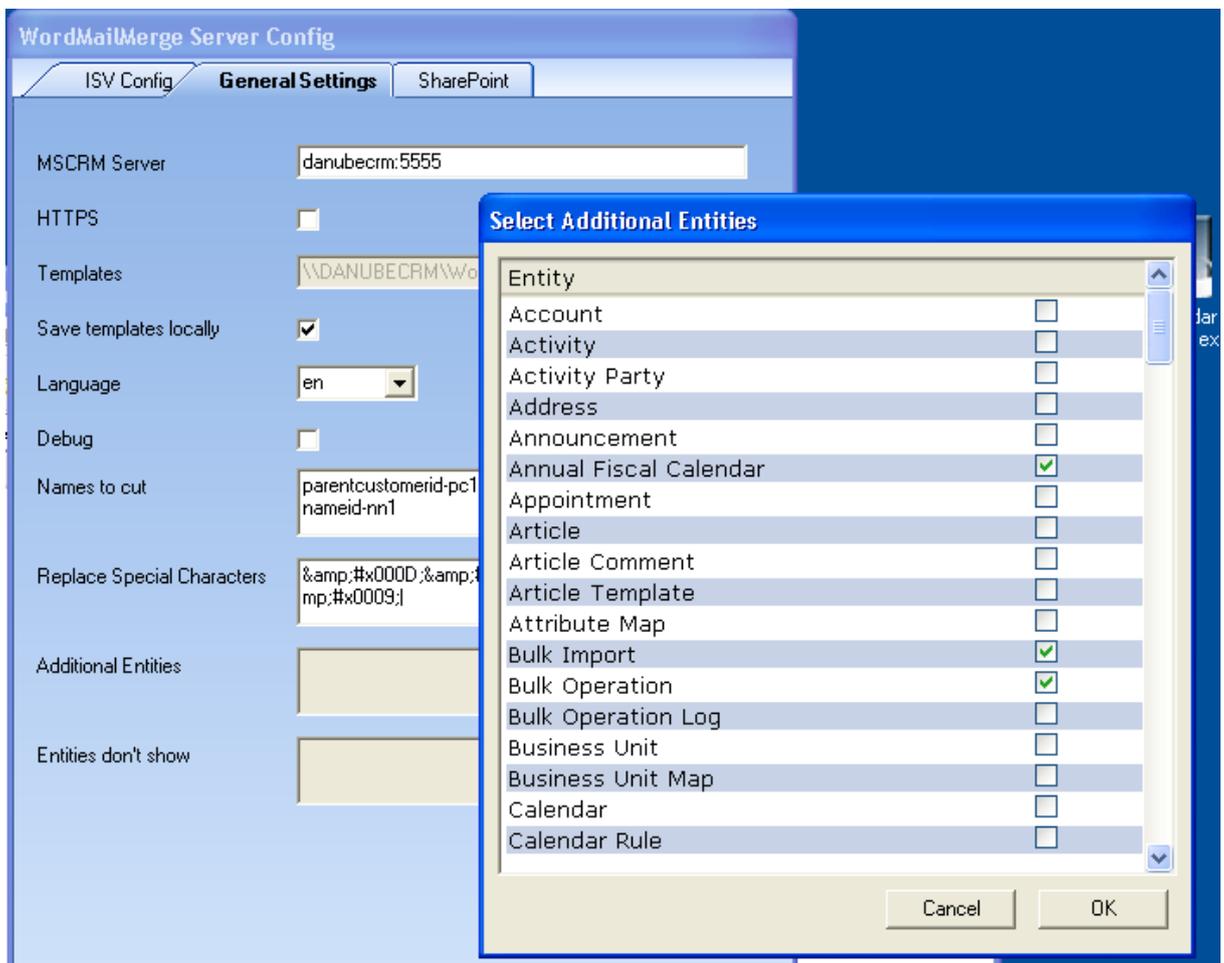
8) **<u>Save templates locally</u>**
   to allow users to use templates from their local machines.

   Users can specify the folder where they want to use the templates locally from in the WordMailMerge Settings on the client.
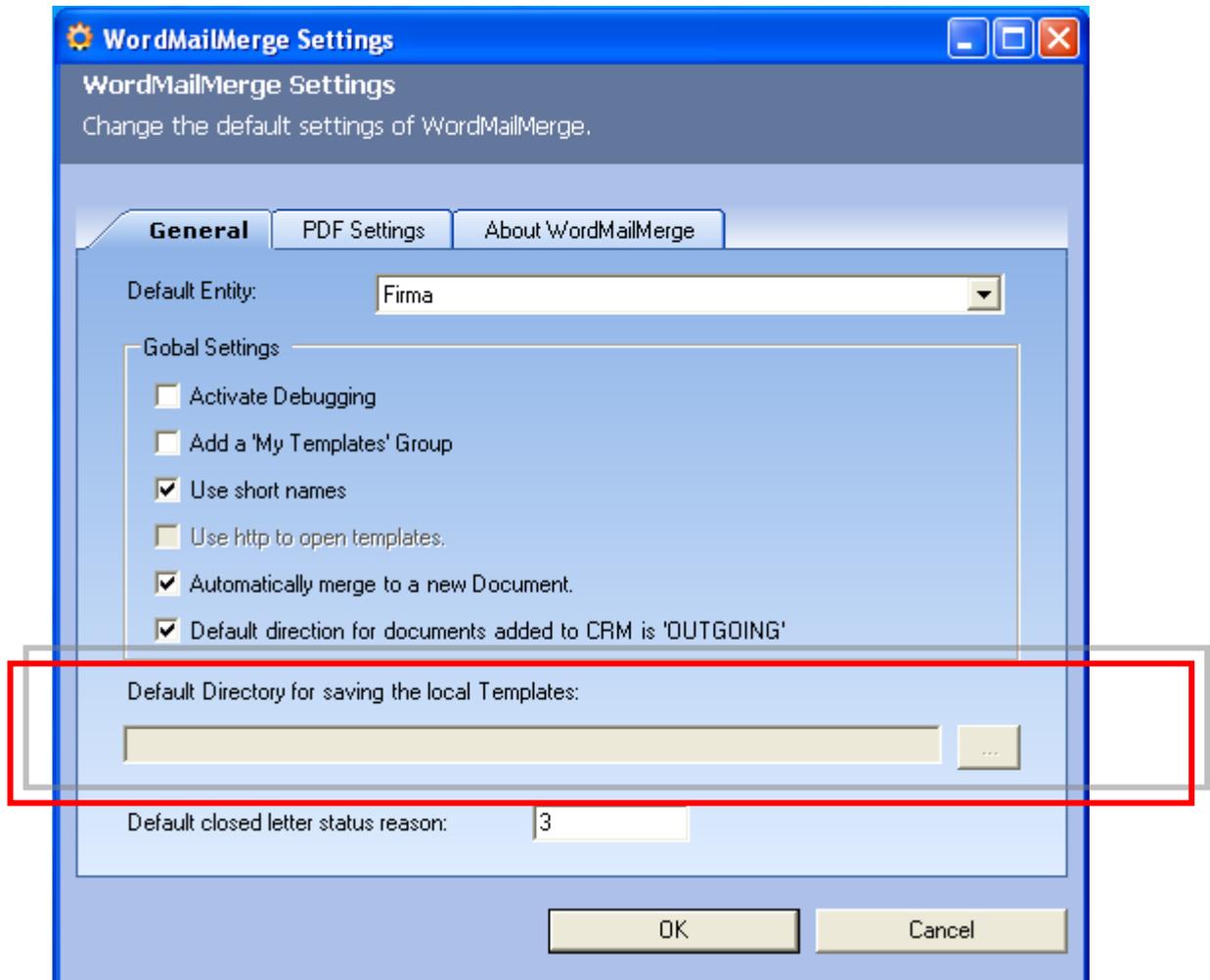
9) **Folder Displayattribute**

This setting allows you to set an attribute which should be used as foldername on the Sharepoint/Fileshare.
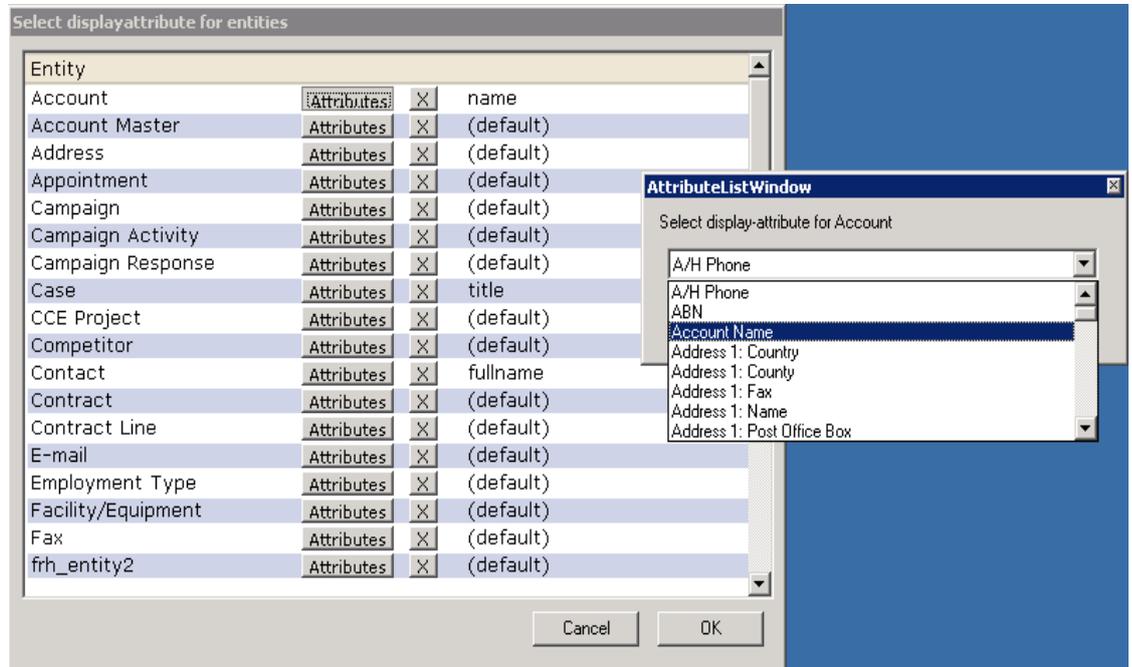
With the configuration above, documents created for the account entitie will be saved to to a "companyname"-folder, Cases will be saved to a "case-title" folder etc...

1.3.3 File Explorer

Since version 2.39 it's possible to use a File-share as location for documents created via WordmailMerge (Activities)
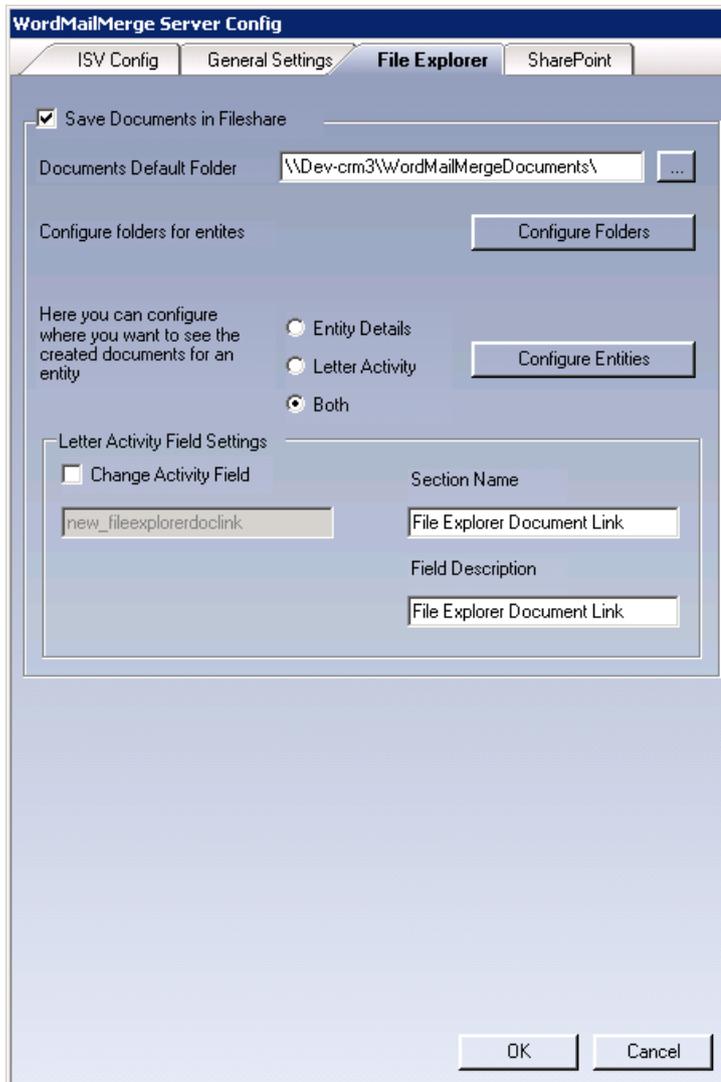
1) **Save Documents in fileshare**

Check here to activate.
Notice: It's not possible to use both, sharepoint / fileshare.
Whe activating fileshare, Sharepoint will be deactivated automatically.

2) **Documents Default Folder**
Specifies the file-share to which the created documents should be saved to.

You can choose/create a folder with a click on [...]
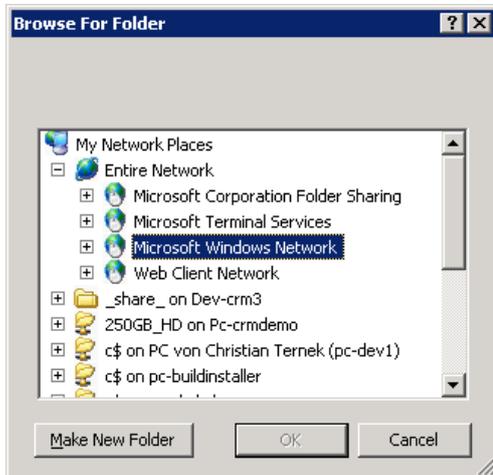
3) **Configure Folder for entities**

Here you can specify a specific folder for each entity.
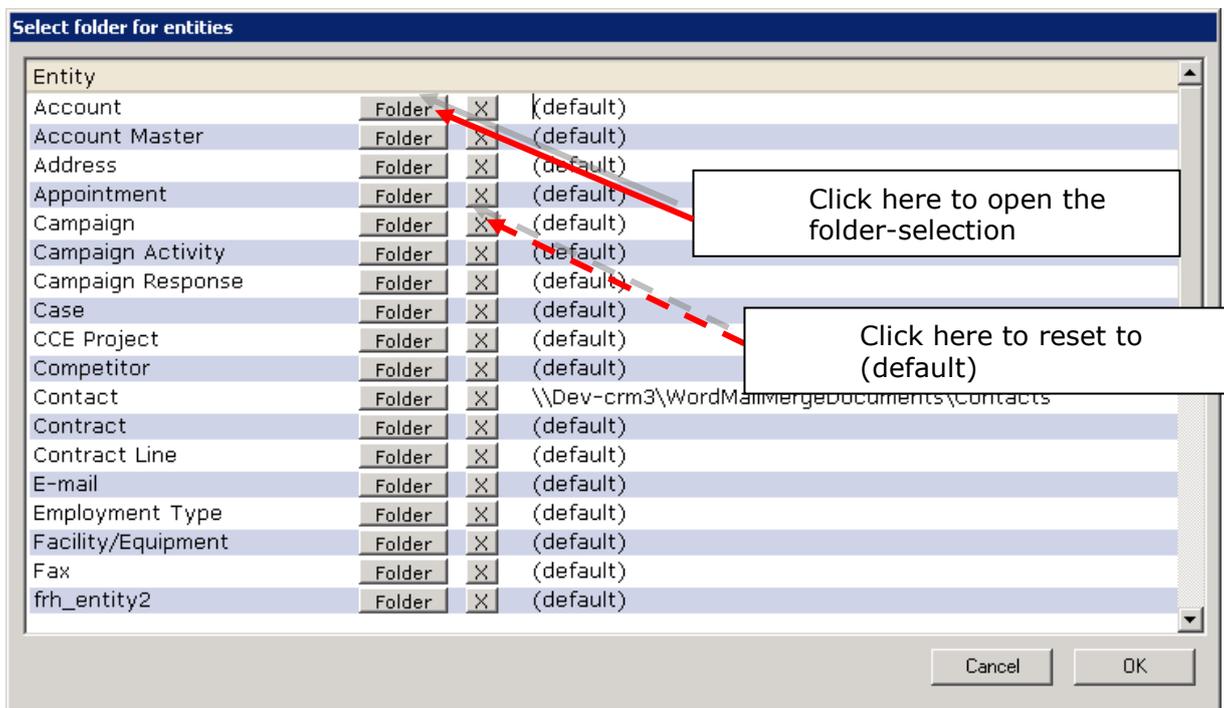
Click on [Folder] to open the Selection (e.g contact)
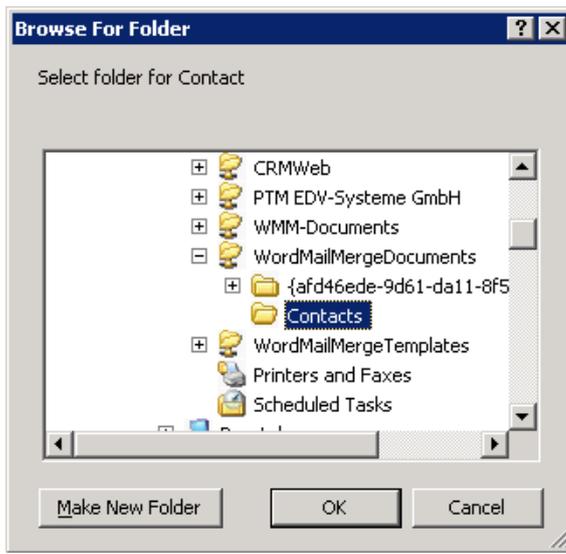
All documents for entity account will be saved to this folder afterwards.

If you set this option to (default) documents will be saved to the root of the fileshare.

4) **Display Options**

here you can choose how the saved documents should be displayed within MS CRM.

There are two possibilities:

- Entity Details:

New option which shows up all documents saved tot he CRM record in an iframe
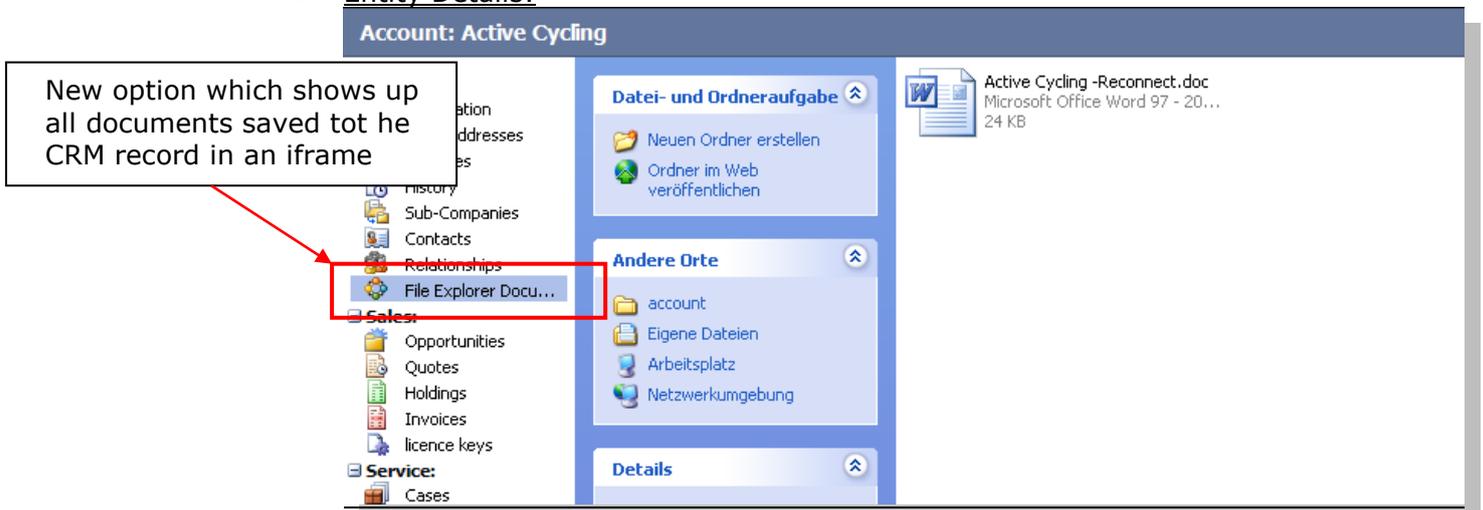
- Letter Activity: The created activity contains a new field which shows up the link to the document on the file share.
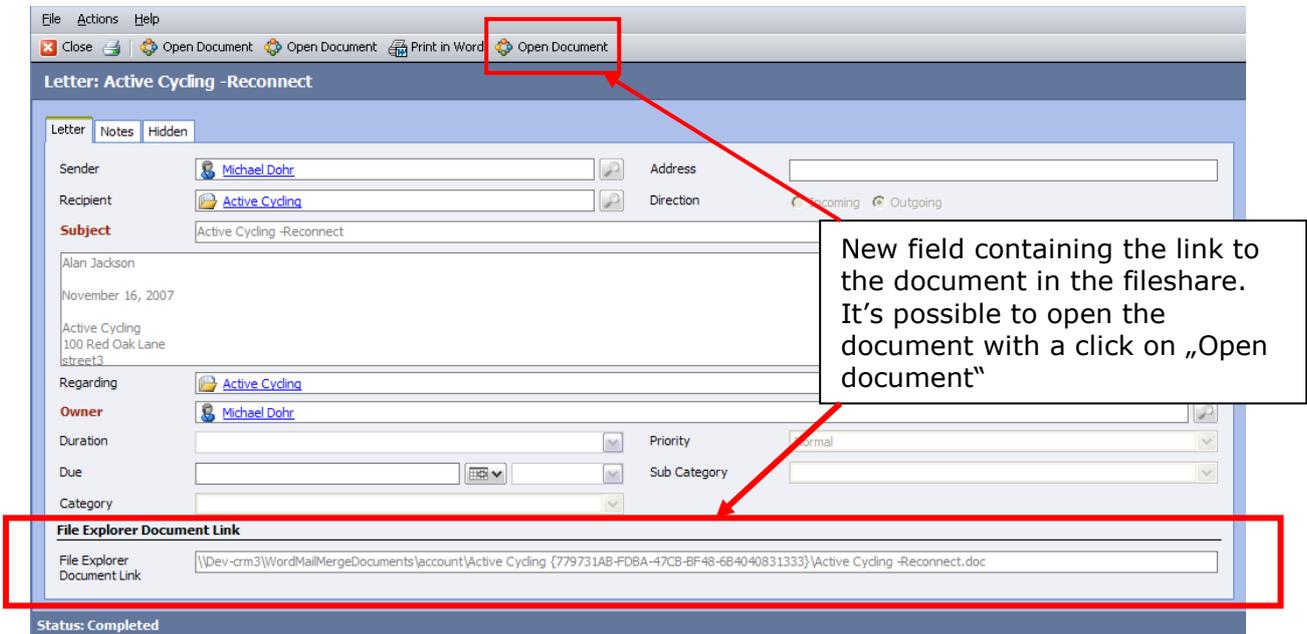
A new attribute called "*new_fileexplorerdoclink*" is defined automatically.
If you want to use another attribute, check the [change activity field] – option in the Letter Activity Field Settings.

IMPORTANT: the field specified MUST exist in CRM.

Furtheron it's possible to use both options

1.3.4 SharePoint

Since version 2.26 it's possible to use an MS Sharepoint as location for WordMailMerge documents (templates, merged documents)

System requirements:
- Sharepoint Services 2.0 or 3.0
- Sharepoint Portal Server 2003 or 2007

The tab is basically divided in general sharepoint settings and the "Save documents in SharePoint" – settings

1.3.4.1 General Settings

1) **Use SharePoint**
   Choose this option to use Sharepoint. When activated the WordMailMerge templates will be saved and loaded from the sharepoint, otherwise they will be loaded from the WordMailMerge templates share on the server (see chapter 1.3.2)

2) **Sharepoint Server**
   Enter name and Port of the Sharepoint Server here. (in our case the name is danubecrm and port is 1919)
   IMPORTANT: Changing the server will reset all sharepoint specific settings
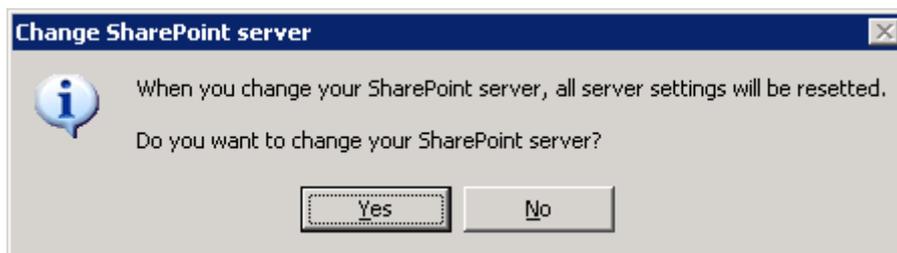
3) **HTTPS**
   Check this option if you want to use https mode. You have to copy your certificate into the installation directory of WordMailMerge Server. The file must be named "clientcert.cer"

4) **Template Folder Name**
   Here you have to define the folder on the server where the WordMailMerge templates are located. With a click on [..] following window appears:
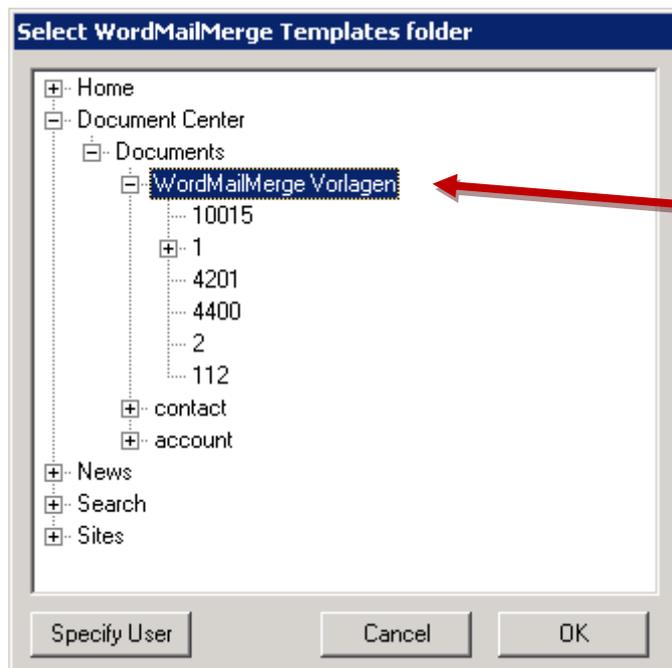
Choose the folder where the WordMailMerge templates are located.

1.3.4.2 Save documents to SharePoint settings

Here its possible to define how the documents should be saved to the SharePoint
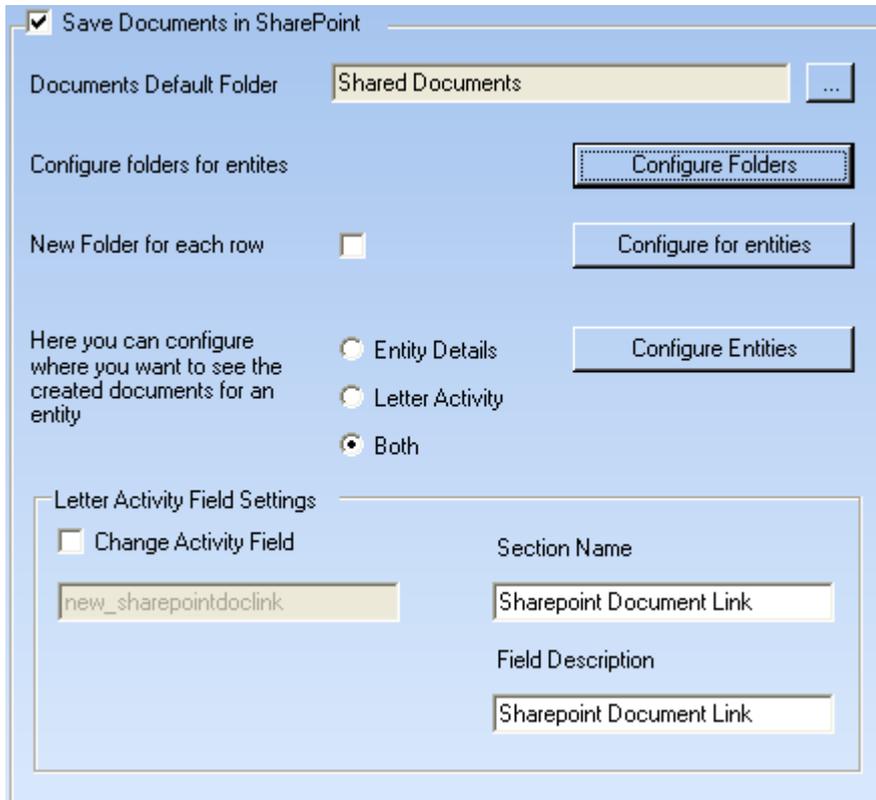
5) **Save Documents in SharePoint**

Check here to activate.
Notice : The WordMailMerge – services have to be installed on the Sharepoint to activate.
You'll get following notification if the necessary services could not be found:
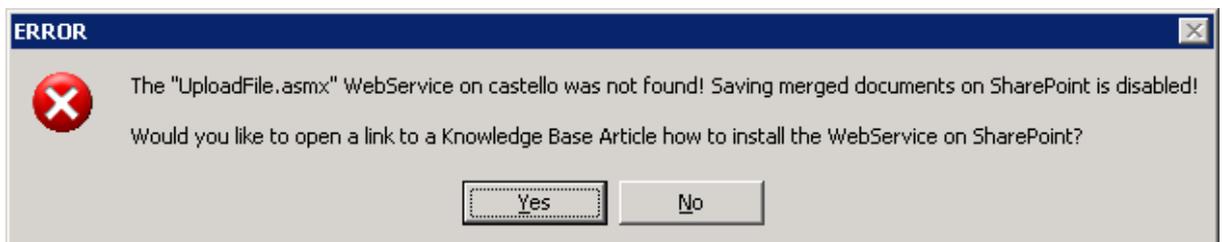
In this case you'll have to install the WMM Sharepoint services on the SharePoint
-> see KB-article:
http://support.mscrm-addons.com/default.aspx?KB=10272

6) Documents Default Folder
Specifies the default folder for documents saved with WordMailMerge

You can choose the folder with a click on [...]
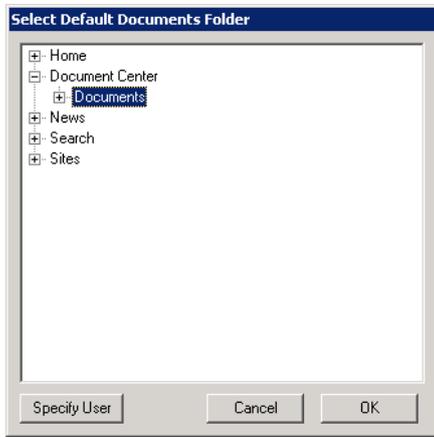
May you don't have permissions to read the existing folders, in this case you can change the user with a click on [Specify User]
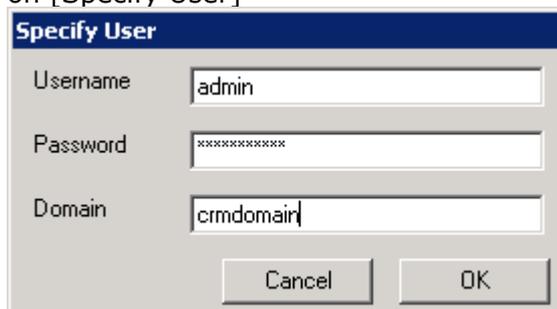
When you select a folder or list the first time, you will get following message:
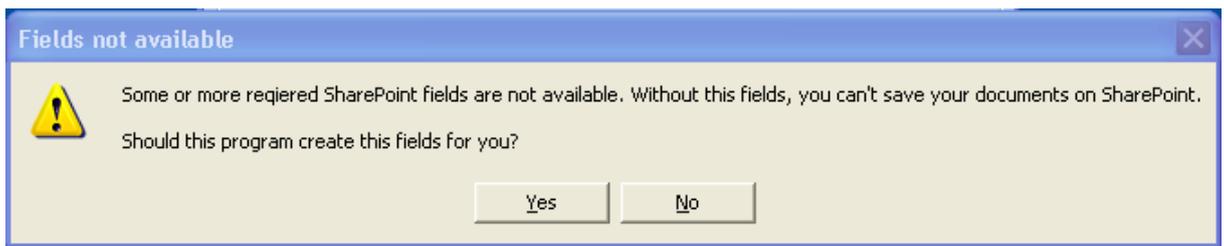
WordMailMerge needs additional fields on the current sharepoint-list to save the merged documents. The configtool can create this fields for you or you must create it yourself.
Fields:
- ✓ Fieldtype: Text / Name: WordMailMergeGUID / Length: minimum 50
- ✓ Fieldtype: Text / Name: WordMailMerge / Length: minimum 50

7) **Configure Folder for entities**

Here you can specify a specific folder for each entity.
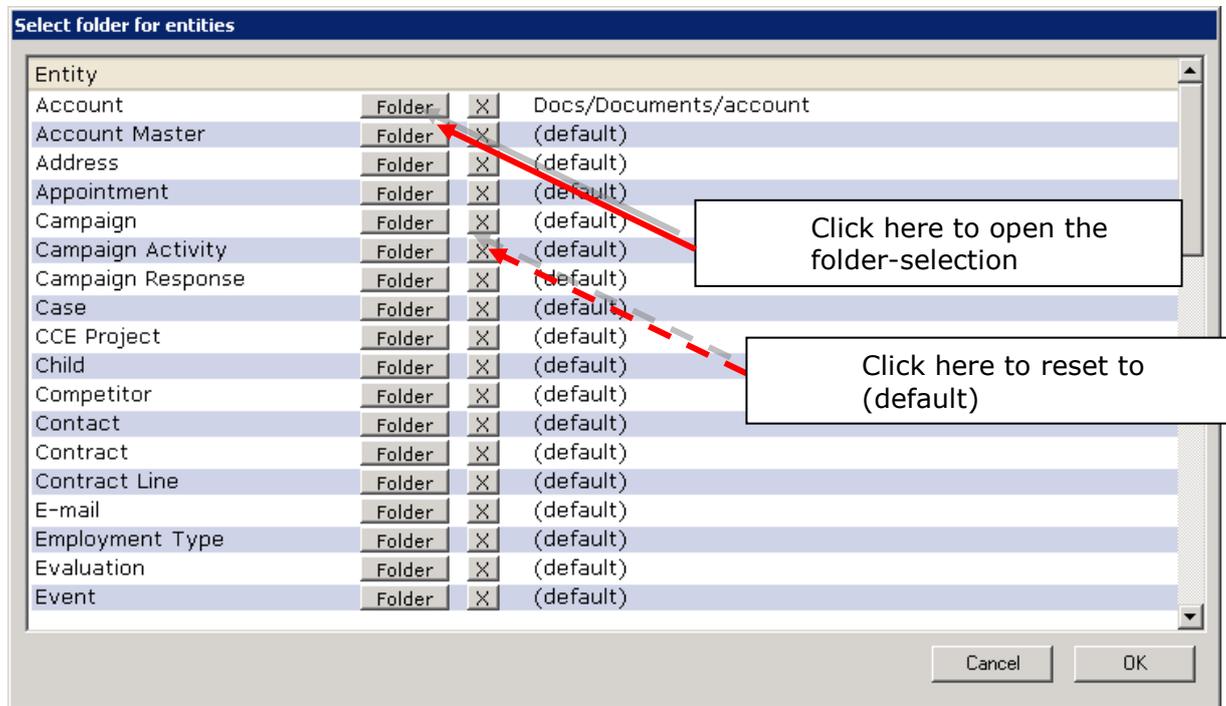
Click on [Folder] to open the Selection (e.g account)
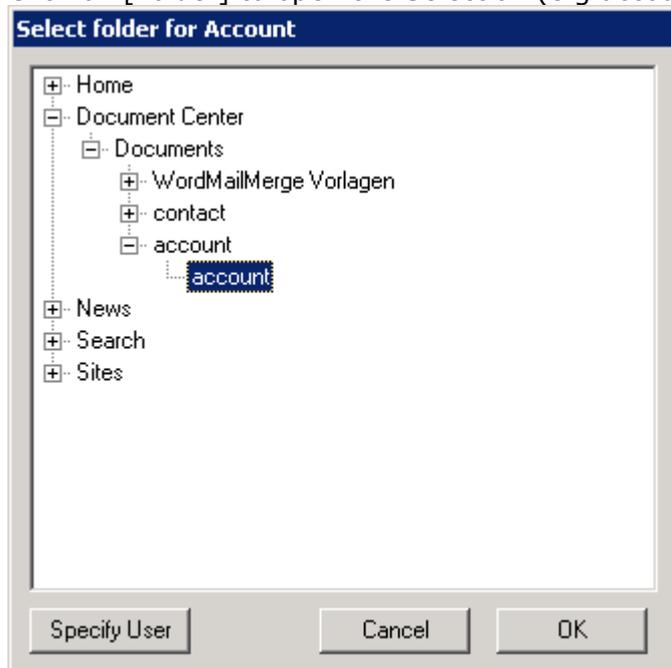
All documents for entity account will be saved to this folder afterwards.

Set this option to (default) to use the Documents default folder (see chapter 1.3.3.2)

8) **New Folder for each row**

Here you can choose if you want to have an extra folder for each record of an entity (e.g account, contact,....)

you can set this option by default with the checkbox.

To specify this option for each entity, click on [Configure for entities]

Options:

- Checked: a new folder will be created for each record
- Unchecked: Templates saved for this entity will be saved to the folder specified in No: 2 and 3 (see above)
- (default): overtakes the state of the "New Folder for each row"-Checkbox.

-

9) Visualization options

Here it's possible to choose where you want to see the created/saved documents

Basically there are two options:

- **Entity details**

  The documents will be shown within the entity details of the entities.
  A new menu option will appear in the sidebar.

A new option, which shows up an IFrame of the Sharepoint-documents, is available in the sidebar.
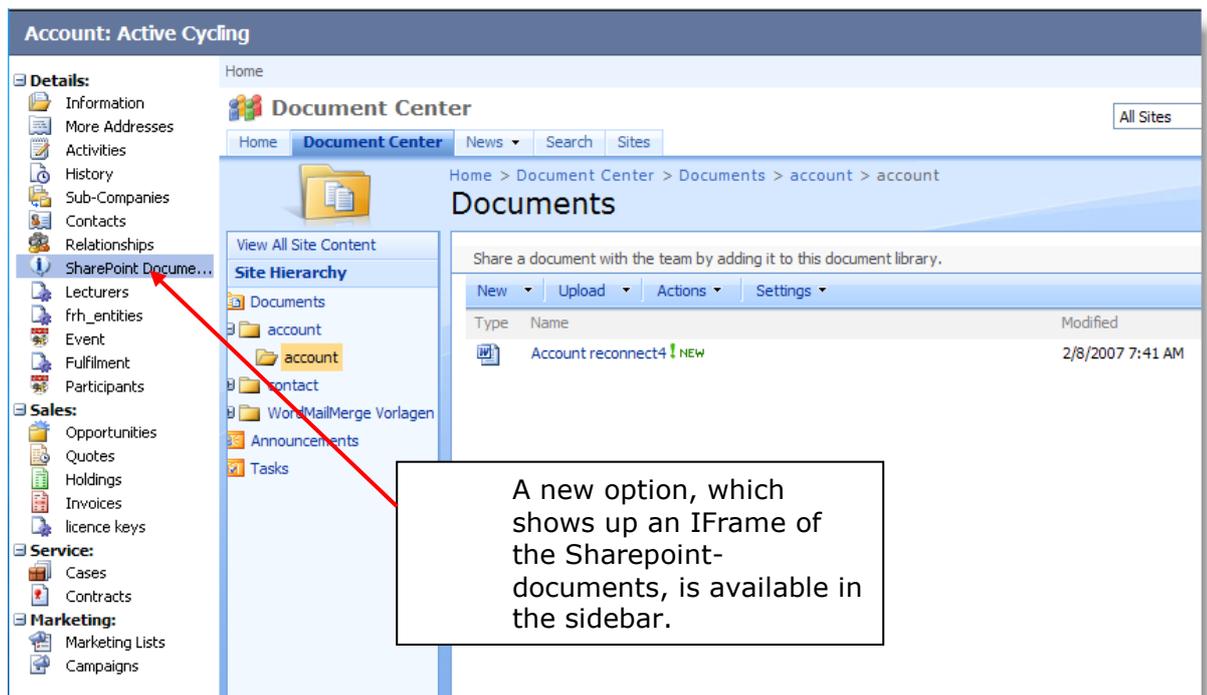
you can specify the entities where this option should appear with a click on [Configure for entities]
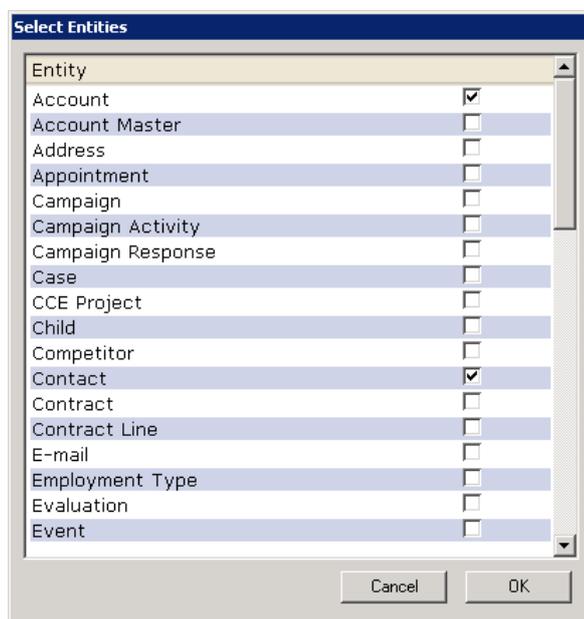
By default the view "AllItems.aspx" is used to view your sharepoint documents. If you have created your own view, you could configure this view on the ASPX Site setting.

- **Letter activity**

    A new attribute will be added to the "letter"-entity where a link to the document on the sharepoint is saved.

    You can change the attribute with by checking the [Change Activity Field] option. Following info-screen appears:
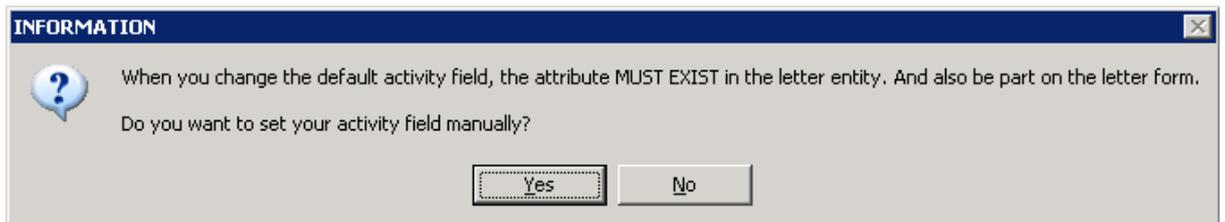
    Insert the new attribute name in the textbox:
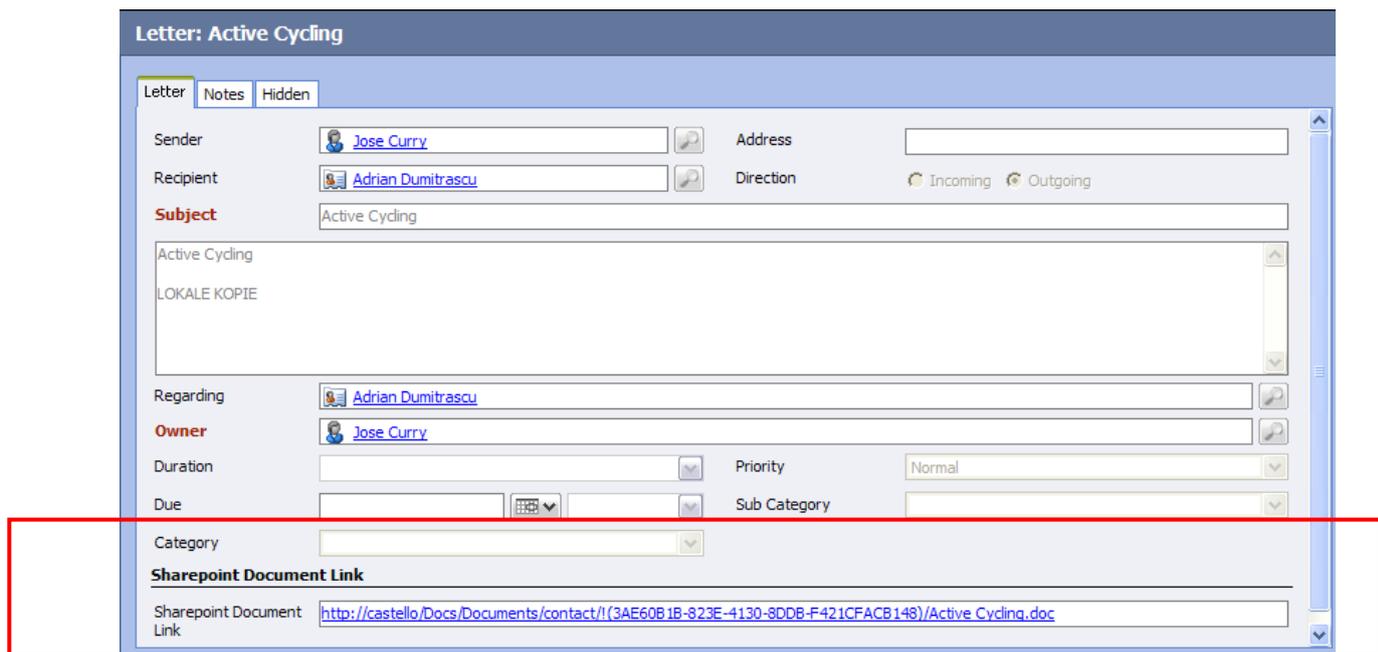
    New attribute which contains the link to the document on the Sharepoint

    If you want to see the documents in the sidebar and in the letter activity, choose the "both" opion.

1.4   Installing the client component

1.4.1   Prerequests

Setting Internet Explorer Security, to enable mail merge from the CRM web client
The tasks below are done on each client machine or on the terminal server.

WordMailMerge will run under the standard security settings pre-defined for the zone "Trusted sites", however as part of the Internet Explorer security, you will be prompted if you want to activate the WordMailMerge ActiveX add-in.

In order to run WordMailMerge without being prompted, follow the steps below.

First, you need to check what Security Zone the CRM system runs in, on the client machine.
To complete this task, do the following:

1. Start Internet Explorer
2. Type the CRM Server address in the "Address Bar"
3. Check the Zone Setting on the right side of the Internet Explorer Status Bar

Example of the Zone Settings:

The following screenshot shows you how to change the security zone of MS CRM.
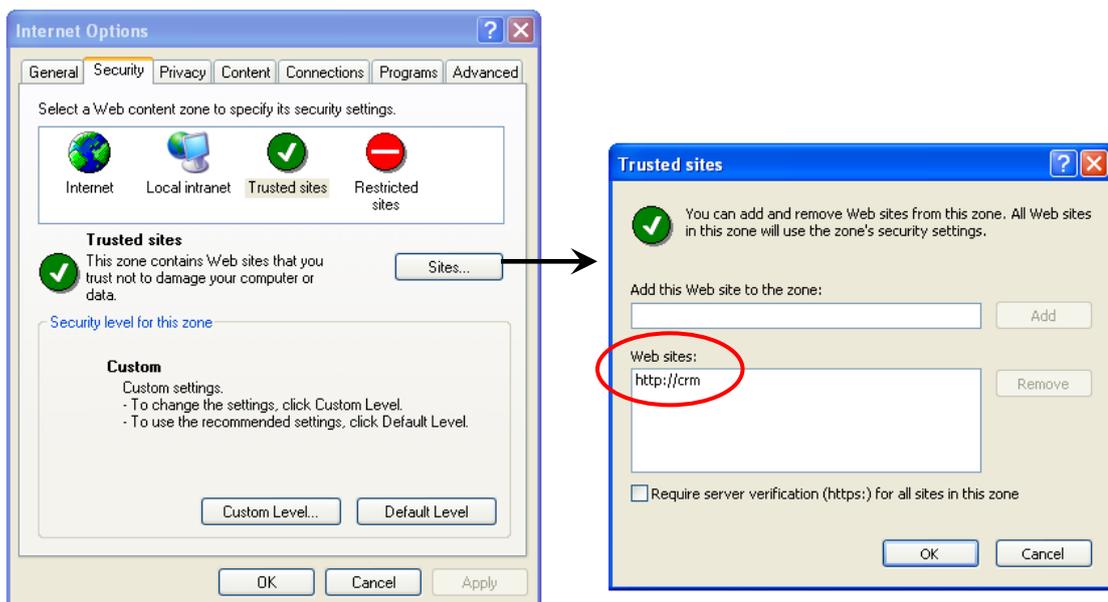
Please enter your crm-site to this list on every client!

Setup Internet Explorer to allow the WordMailMerge ActiveX controls to run:
4. Double-Click on the **Zone Setting Icon** (Local Intranet in this example).
   The following dialog box will appear:

5. Click on the **Custom Level** button, to view the current Security Zone
    Settings. You must now set the following settings, to either "Enable" or
    "Prompt" ("Enable" is recommended):

6. Click OK twice to accept and close the Security Zone Settings

The WordMailMerge Client is now setup and ready to mail merge from both
Microsoft Word and the Microsoft CRM Web Client.

1.4.2 Installing WordMailMerge Client

IMPORTANT Before installing the components:
1. **Close all Office products (MS WORD, MS Outlook,..)**
2. **Be sure that the machine is online to the MS CRM server**

To go sure you can verify that Word and Outlook not are running, by starting the
Windows **Task manager**, and checking that WINWORD.EXE and OUTLOOK.EXE
are not running in the processes list.

Install the component on the client:

1. Run the "WordMailMerge Client for MS CRM 3.msi" Setup file.
   You will see following window:

Click Next ->

2. End User License Agreement(EULA)

3. MSCRM Server
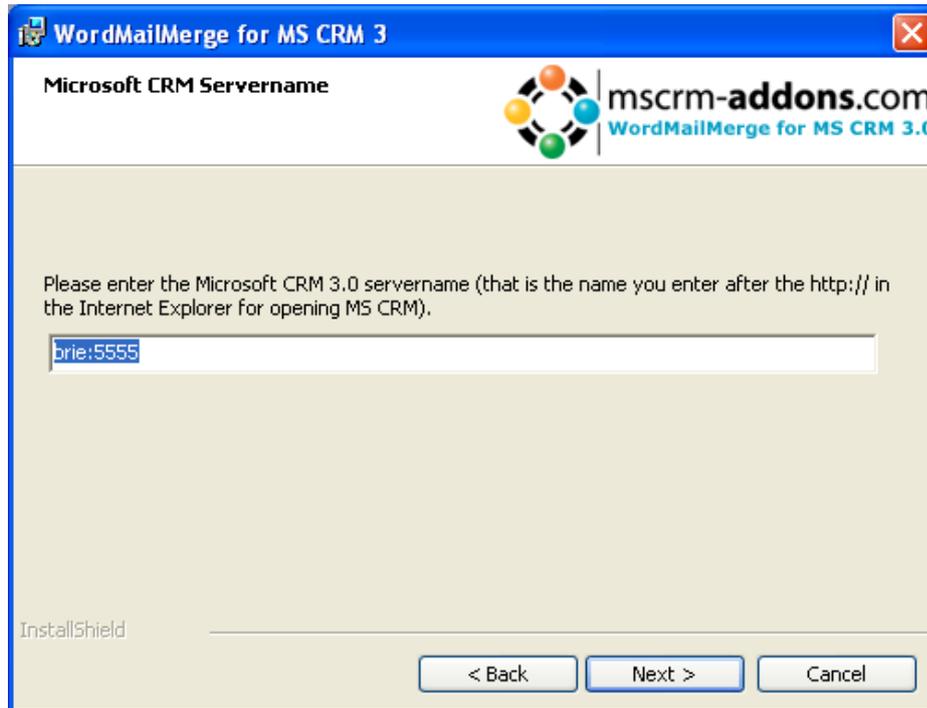
Enter on this page the Name of the CRM Server.
This is the name you enter in the Internet Explorer(without http://).
Also enter the port number if it is not standard.

Click Next ->

4. Select Installation Folder
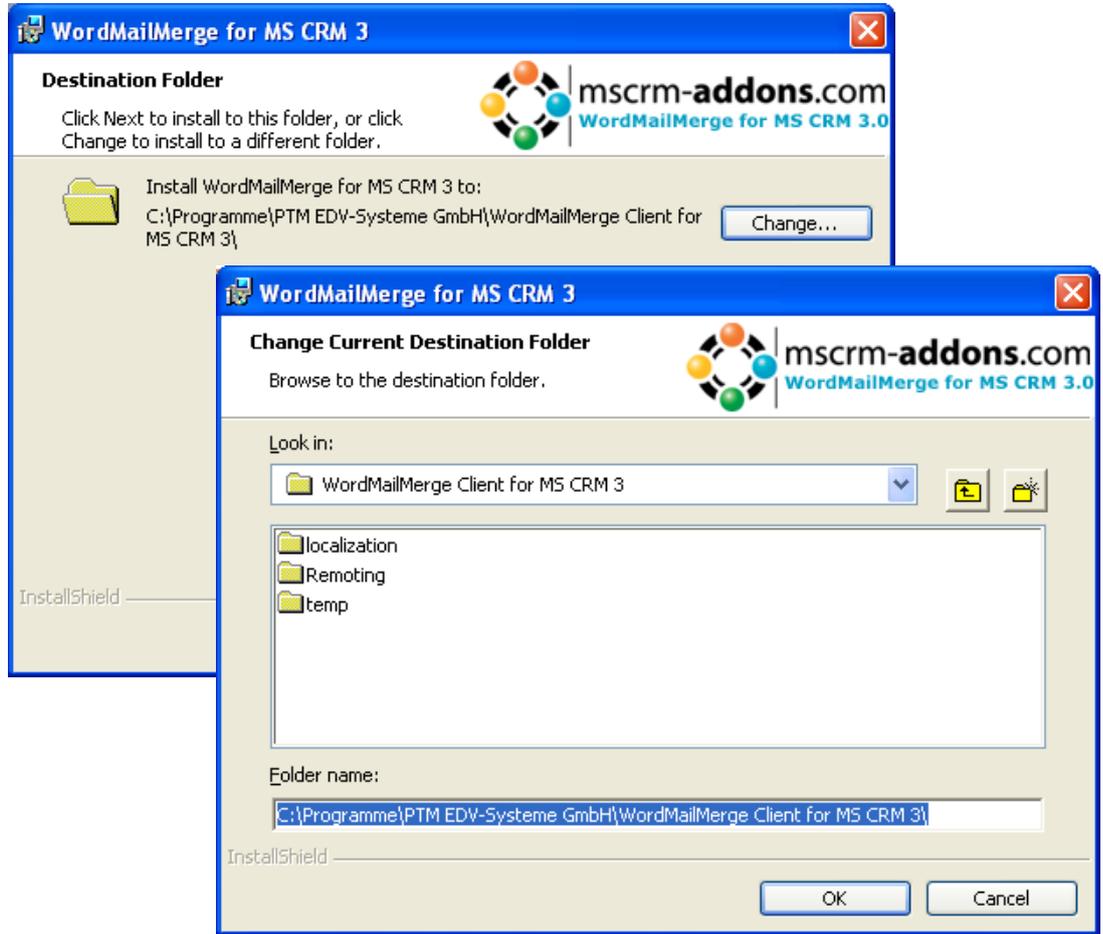
Click Next ->

5. Confirm Installation
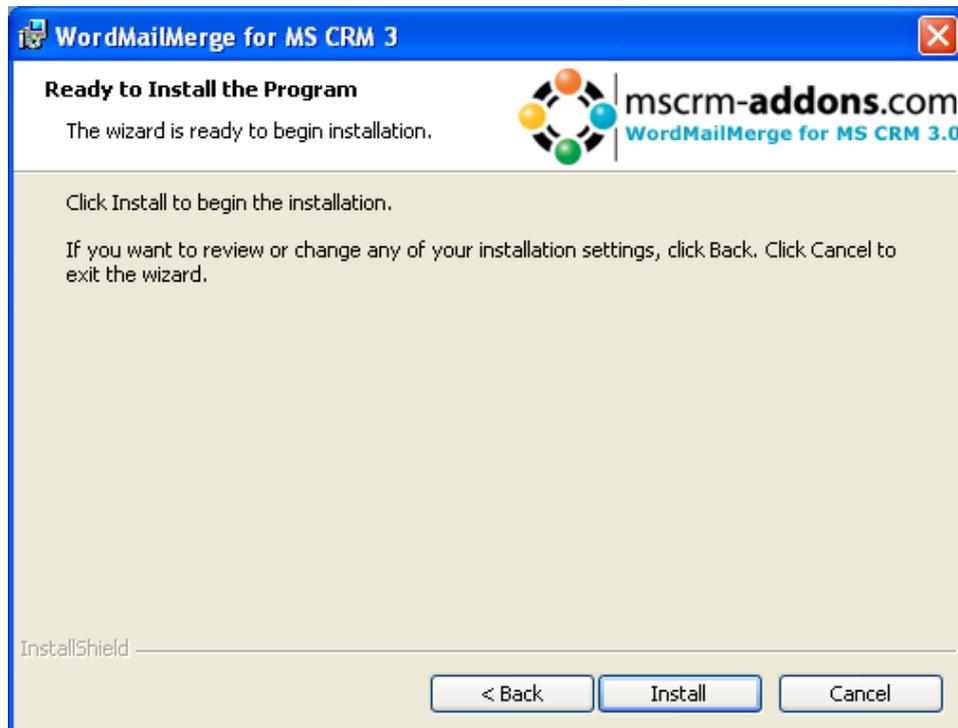
Click Install->

6. Choose the language you want to use and click OK

7. After the installation ended go to your MS Word and you will see following new Toolbar with the Buttons "WordMailMerge for MS CRM", " Choose CRM Data", "Create CRM activity" and the optional buttons "Send as PDF" and "Get My Data":
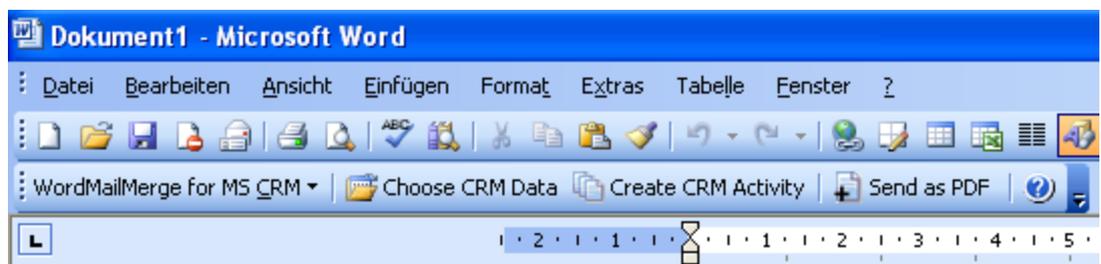
8. In some cases there are problems that the buttons in MS WORD does nothing!
In that case you have to re-start your PC and after that it works!

1.5 Language Settings for WordMailMerge

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

1.5.1 Language Settings on the Client

1.5.1.1 Location of the Language Settings on the Client

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

The language file is located in the sub folder **localization** of WordMailMerge installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\WordMailMerge Client for MS CRM 3\Localization"

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

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

1.5.1.2 Modifying the UI language on a client

The UI Language is determined at startup by the registry setting "**Language**". To modify this setting, follow this procedure:

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

NOTE: In order to use another language than English, you need to create a copy of the "en.Xml" language file, and rename it for a valid language setting. For example, to create a Dutch language file, rename the file to "nl.Xml" and then translate the strings in the file.
After that you open the registry and change the value of "language" setting to **nl.**

1.5.1.3 How to translate a language file

You can use a Text Editor or a generic XML Editor to edit the language files.

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

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

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

1.5.2 Language Settings on the Server

1.5.2.1 Location of the Language Setting on the Server

The UI of WordMailMerge Server can be modified to any language. All UI display strings are stored in a XML File.

1.5.2.2 Location of the Language Settings on the Server

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

The language file is located in the sub folder **localization** of WordMailMerge installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\WordMailMerge Server for MS CRM 3\Localization"

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

Note: The language XML-Files from the server and client component are different. If you want to translate WordMailMerge you have to translate both files the language file on the client and on the server.

1.5.2.3 Modifying the UI language on a client

The UI Language is determined in the web.config of the WordMailMerge Server Component. To modify this setting, follow this procedure:

1. Go To the folder **c:\program files\PTM EDV-Systeme Gmbh\WordMailMerge Server for MS CRM 3**
2. Open the file web.config
3. Locate the following entry:
   <add key="Language" value="en"/>
4. Change the value to the language you want
5. save the web.config and close

NOTE: In order to use another language than English, you need to create a copy of the "en.Xml" language file, and rename it for a valid language setting. For example, to create a Dutch language file, rename the file to "nl.Xml" and then translate the strings in the file.
After that you change the value in the web.config to **nl.**

1.5.2.4 How to translate a language file

Look at chapter 1.5.1.3

1.5.3 Too Long Mergefields Problem

In some cases there occurs a problem with too long Mergefield Names. Winword just support a length of 40 characters for a Mergefield.
So if you add two Fields called

{ MERGEFIELD customerid_contact_parentcustomerid_address1_country *
MERGEFORMAT }

{ MERGEFIELD customerid_contact_parentcustomerid_address1_fax *
MERGEFORMAT }

Winword shows you (after ALT-F9) two fields called

«customerid_contact_parentcustomerid_addr»

«customerid_contact_parentcustomerid_addr»

So WordMailMerge can't differentiate them !!
Now to solve this Problem we added the possibility to replace long Names with short Names. For e.g. "parentcustomerid" with "pc1".

1.5.3.1 Set up Too Long Mergefields

In the **web.config** of WMM-Server there is a new KEY called "**NamesToCut**". (Do not change this name!)

```
<add key="NamesToCut" value="parentcustomerid-pc1,parentaccountid-
pa1"/>
```

This means to replace "parentcustomerid" with "pc1", also to replace "parentaccountid" with "pa1".

WMM replaces now all findings, this means if you have an Mergefield called "customerid_parentcustomerid_parentaccountid_name" it will be changed to "customerid_pc1_pa1_name".

It also changes them by order.
So if you change it to `value="customerid-cid1,parentcustomerid-pc1,parentaccountid-pa1"` it replaces the Mergefield above to "cid1_parentcid1_pa1_name".
If you add customerid to the End (`value="parentcustomerid-pc1,parentaccountid-pa1,customerid-cid1"`) the result is "cid1_pc1_pa1_name"

1.5.3.2 Important thing you should know!!

If you change the NamesToCut KEY maybe all OLD Templates will be affected! Because in your old Templates the Mergefields are still stored with the long name.

Example:
A existing Document with two Mergefields.
parentaccountid_name and parentaccountid_fax

Now you change the Web.config to shorten parentaccountid to pc1.
NEW Templates will be filled right! (Insert MailmergeFields inserts the right short name into your Template.)
But all the OLD Templates which uses Mergefields including parentaccountid will not work any more! So you have to edit them! (Maybe the Replace… Function of Winword will be a good Idea.)
Sometimes it will be the better Way to replace full Mergefields. So instead of changing just a part of a Mergefield let WMM replace the whole one.
E.g.:
"customerid_contact_parentcustomerid_address1_fax" to
"cust_cont_par_adr1_fax"

So old Templates won't be affected but you have to add every Field to the web.config.

2　WordMailMerge Templates

WordMailMerge Templates are predefined Word Templates which have some mail merge fields in it. You can define for each MS CRM Entity(f.e. account, contact,..) different Templates.
For example you have a "Account reconnect" Template you often send to accounts. Then you create this template and save it as Account – Template and from this moment every MS CRM User can generate a "Account reconnect" Letter with this template from the MS CRM Web Client.

The installation of WordMailMerge includes this "Account reconnect" template. Test this behaviour and open an account in the WebClient and click on the "Print in Word" Button.

2.1 How to create WordMailMerge Templates

Read the "Users Guide" – Document to get more information about the creation of WordMailMerge Templates.

2.2 Security Settings for WordMailMerge Templates

This section is just for NON-sharepoint users as the templates are stored on a share on the server in this case.

The save WordMailMerge templates are saved in a share on the server where you installed the WordMailMerger server component by default.

Typically under c:\program files\PTM EDV-Systeme GmbH\WordMailMerge Server for MS CRM 3\templates\

If you want to allow only some users to create or change WordMailMerge templates you can do that with defining some NTFS Security Settings on this File Share.

It's also possible to change the location of the WordMailMerge templates. Therefore you have to open the web.config from the WordMailMerge server component. (c:\program files\PTM EDV-Systeme GmbH\WordMailMerge Server for MS CRM 3\web.config.)

In this file you'll find following line:

*<add key="templates"value="**TILSITER\WordMailMergeTemplates**\"/>*

Enter the location of the new location in the value.

3 The WordMailMerge Data- Provider

Since version 2.18 the WordMailMergeDataProvider has been implemented.
It builts up the webservice which is needed to load data from CRM to MS Word and inversely to save data into MS CRM.
This improves the performance of WordMailMerge as the webservice don't has to be established again.

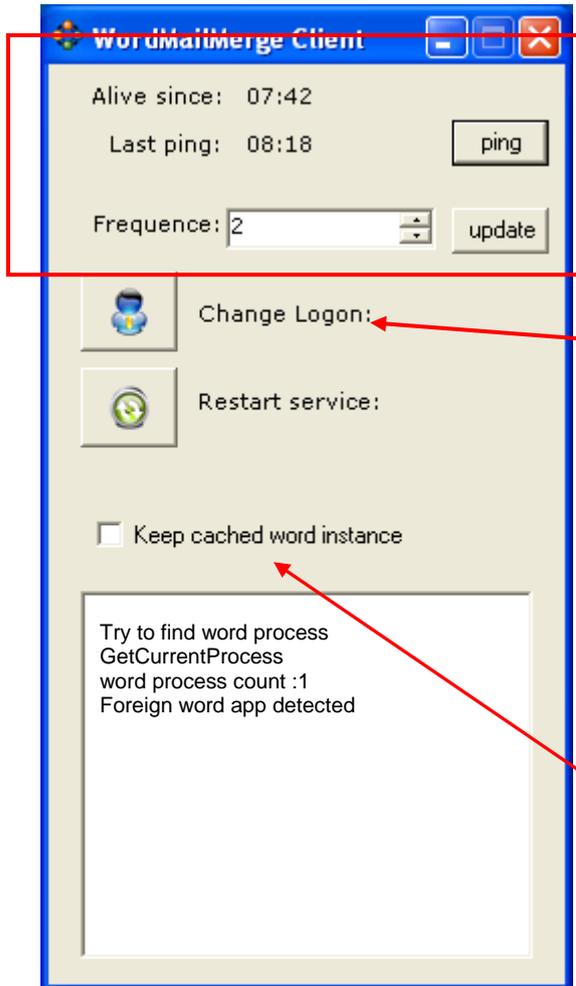You can see if the Provider is started in the taskbar.

3.1 Configuration

Right-click on the icon in the taskbar -> "Config" to open the WordMailMergeDataProvider configuration.

Following window appears:

Status & ping frequence:
Here you can see how long the service has been alive and when the last ping occoured.

In our case, a ping is set every two minutes to ensure that the connection to the server is O.K

User logon:
You can set the user whom you want to logon to CRM here.

Cache word instance:
Furtheron ist possible to keep word instances cached.
This improves the MS Word loading time.
You can see information about cached word instances in the textbox.

Contact

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