WordMailMerge
Fetch Generator Beta

Version 1.0.4

How to use a Direct-Fetch in WordMailMerge

Users's Guide

(How to use WMM Fetch Generator)

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1 Users Guide

1.1 Introduction

With the WordMailMerge Fetch Generator (short called WMMFG) your are now able to generate complex Fetches (=Selects), wich you can use in WordMailMerge.

So now you are able to get ANY Data out of MS CRM 3.0!

2 WordMailMerge-Direct-Fetch

The WordMailMerge-Direct-Fetch function is a spezial solution.

Normaly WMM generates the Fetch using the fields which are in the template. WMM marks these fields in the tree and then generates the fetch.

To go around some limitations WMM has, now there is the possibility to generate a Fetch, store it into the Template and to use this Fetch in WMM.

But to use Direct-Fetch there are some Guidelines to take care of it. Thats why we produced WMMFG, it allows you to generate and test Fetches in an easy way. It also supports backannotation.

3 The WordMailMerge Fetch Generator

The WMMFG is an Allround-Tool. It offers you the following features:

- Generate complex Fetches via Mouse-Click
- Execute Fetches directly (for testing)
- Well-Formated-XML Display (easier to read)
- Break up the Fetch-XML into logical Blccks (easier changing)
- Backannotation. Importing of existings Fetches, so it is very easy to change a existing Fetch.
- Load and save Fetches
- …

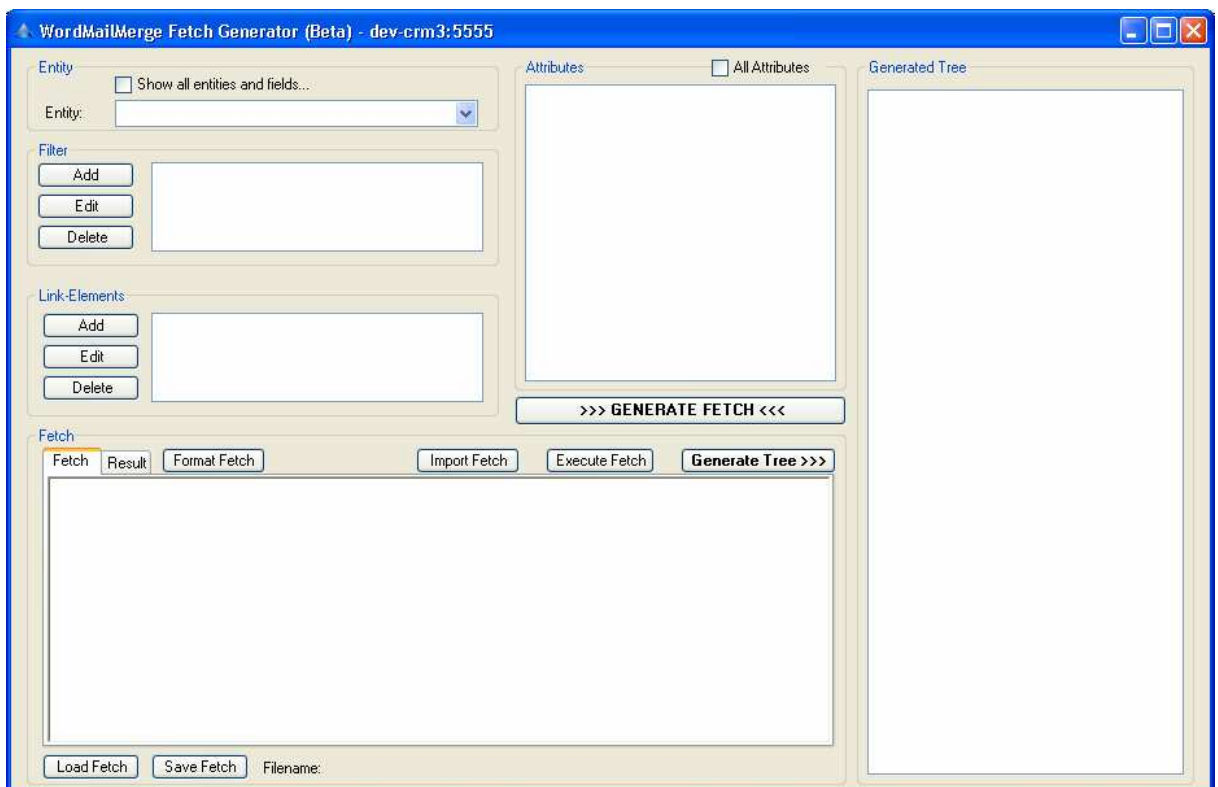More about these points see next chapters…

3.1 Start the WMMFG

First at all you see the Login-Window. Herer you can choose between Integrated Login (Logon with the default User Cedentials) or enter an other user.
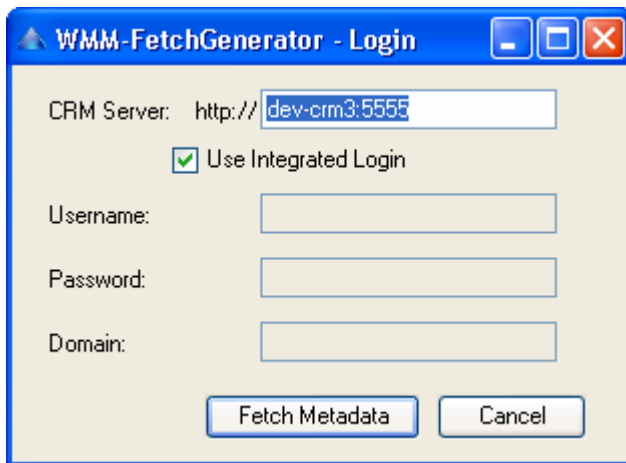
Click on [Fetch Metadata] the Please Wait Window will appear and then the Main Window will be shown.

3.2 Main Window

This window is split into 6 areas:

- Entity   Choose the Main-Entity
- Filter   to set Filter
- Link-Elements   to set Link-Elements (Relations)
- Fetch   All about the Fetch(-XML)
- Attributes   the Main-Entitys Attributes

- Generated Tree   The Tree as it would be shown in WMM

3.2.1 Entity

Here you have to choose the Main Entity.

If '[] Show all Entities and Fields' is activated all Entities and Attributes are shown. Also this ones with NO DISPLAYNAME. So these will be shown in the Tree as an empty Entry!

3.2.2 Filter

Here you can set Filters for this Entity.

3.2.3 Link-Elements

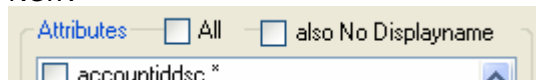To create/select Relationships to other entities.

3.2.4 Fetch

In the Fetch-Tab you see the actual Fetch, which can be tested by clicking on [Execute Fetch]. The result will be shown in the Result-Tab.

3.2.5 Attributes

To choose the needet Attributes of the Main Entity.

New:

There are 2 new Checkboxes now.

[] All … checkes all Attributes in the Attributes-List

[] also No Displayname … normaly just all attributes with an Displayname will be added to the Fetch (and displayed in the Tree).
If you check this Checkbox, really all attributes will be added. If a Attributes has no Displayname, the attribute name will be shown in the tree!
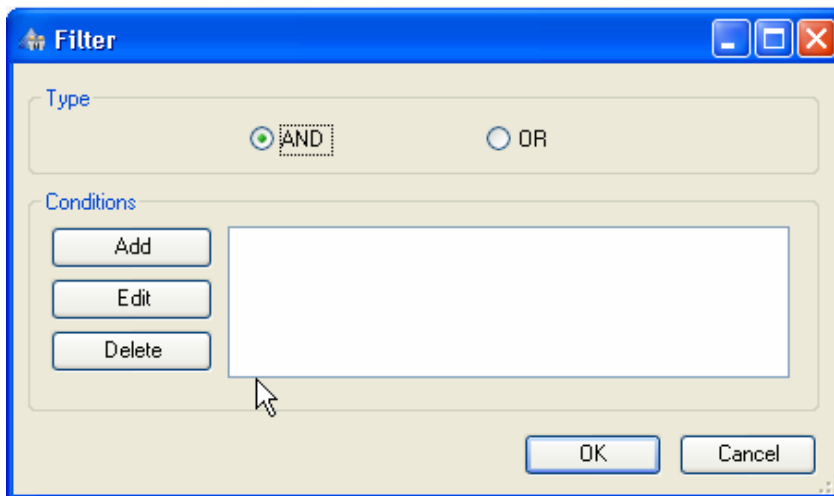
3.2.6 Generated Tree

Here you see the generated Tree which is build on the Data of the Fetch. So if you use Direct-Fetch in your Template, the tree in WMM will look exactly like this.

mscrm-addons.com
WordMailMerge for MS CRM 3.0

3.3 Add a Filter
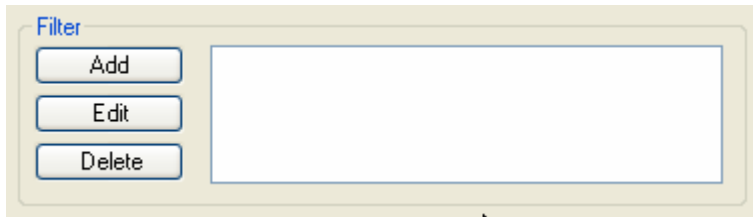
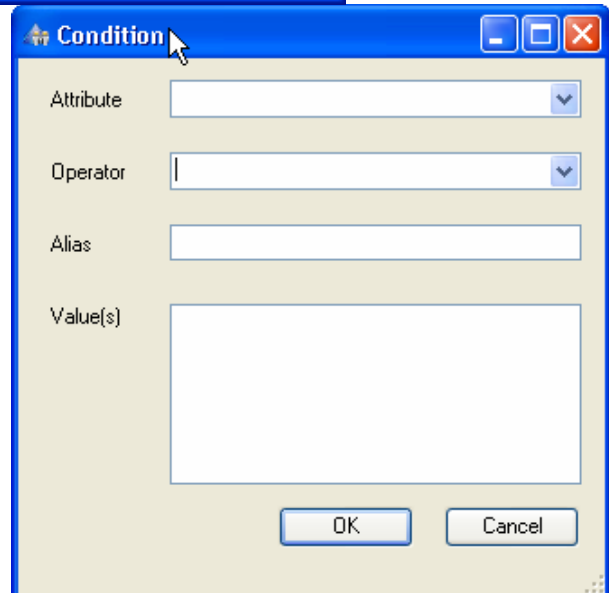Just simply click on [Add]. The Filter Window opens.

Now you can Add, Edit or Delete Conditions.
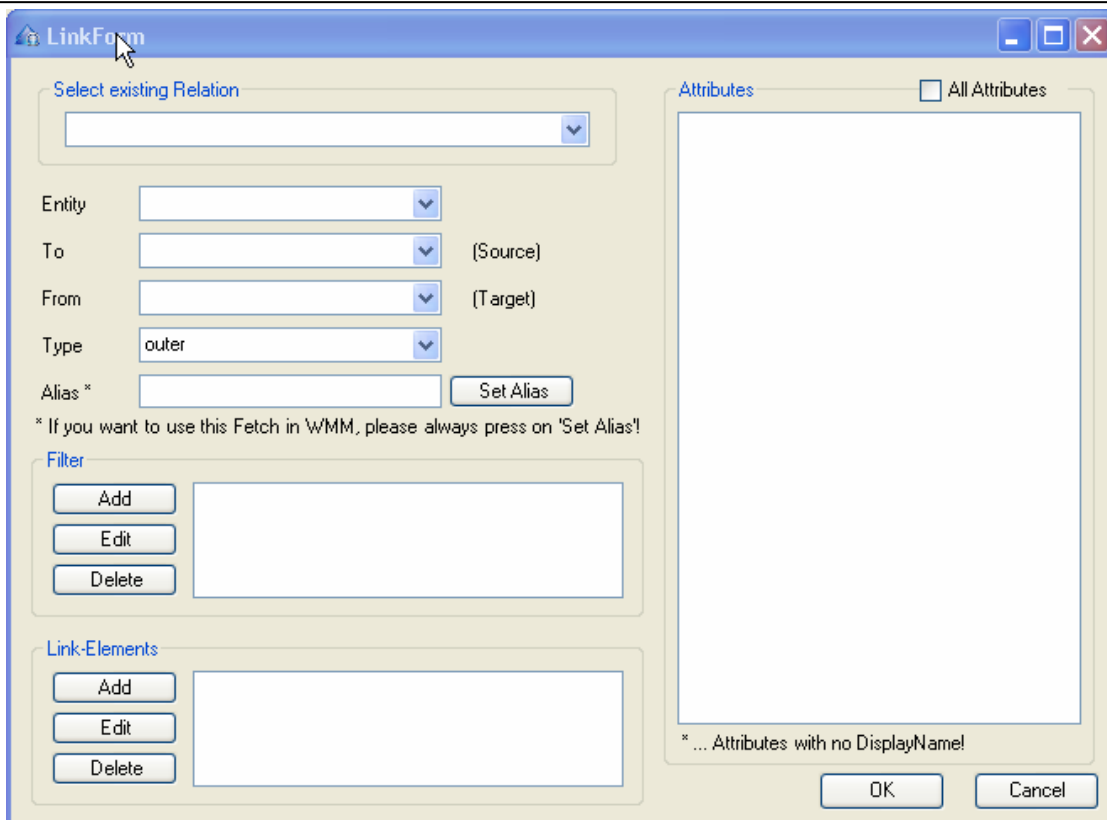

IMPORTANT!

Please only set a Filter on the Main-Entity for testing!

**Remove any Filter on the Main-Entity before you copy it into your Template!**

3.4 Add a Link-Element

With adding a Link-Element you can "build" connections to other Entities.
After clicking on [Add] the LinkForm-Window (after some time) opens.

3.5 Spezial Link-Elements

There are 2 spezial Link-Elements. USER and OTHER CONTACTS. In the normal WMM these two will be added automatically, in Direct-Fetch we have to add these two by just checking the Checkboxes.
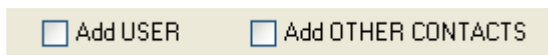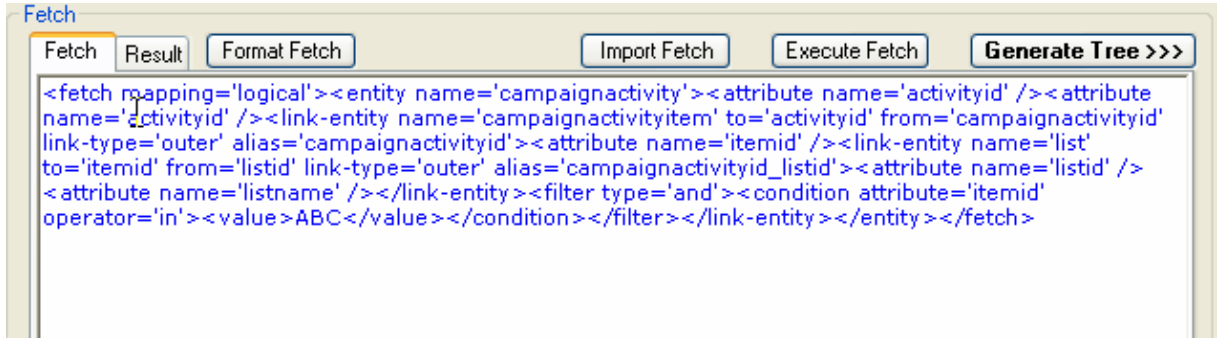
OTHER CONTACTS is only activated by quote, salesorder or invoice.

3.6 Important Buttons

Format Fetch
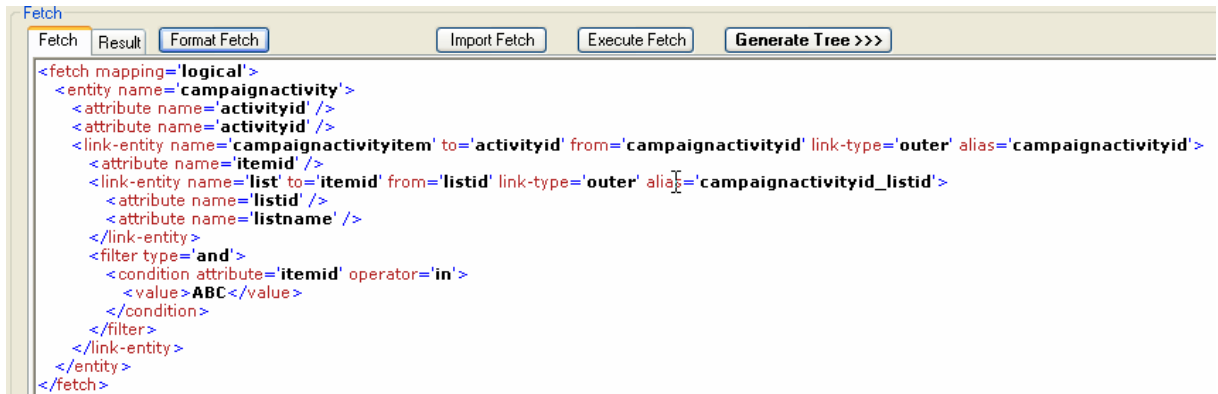
When you Copy and Paste a Fetch, it looks like this:

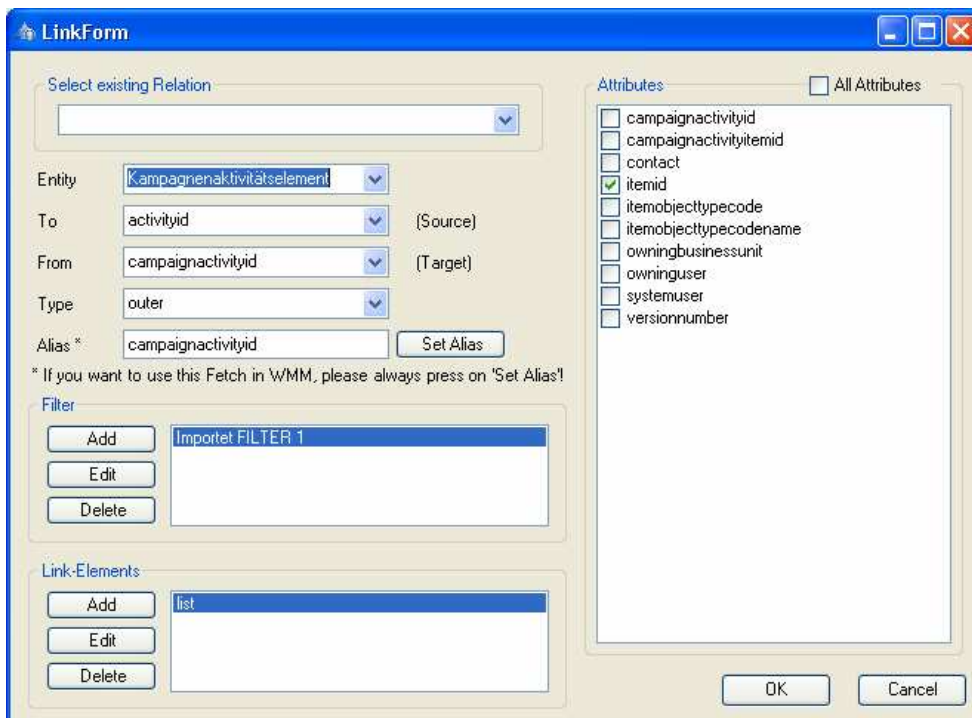

But if you press on [Format Fetch]…

`Import Fetch`

Use this Button to import a Fetch. (To Backannotate this Fetch.)
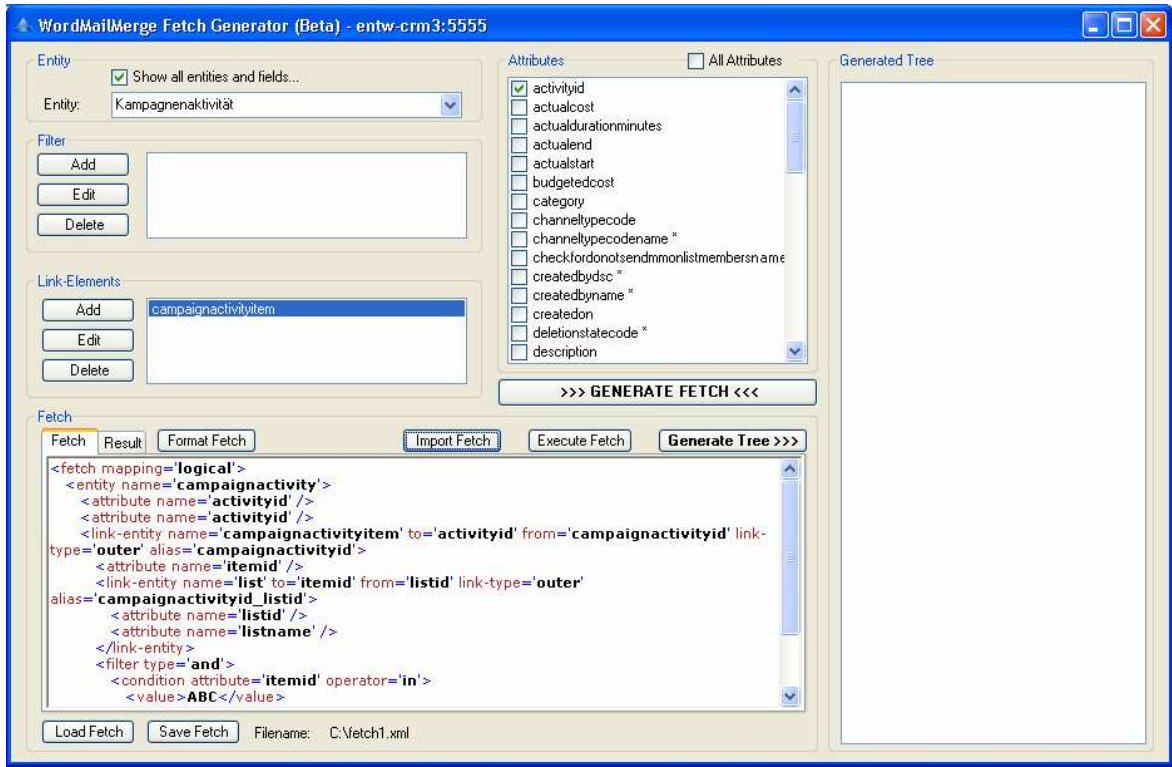
Here you see that the Fetch was importet.

For e.g. if you now press on [Edit] from Link-Elements a new Window opens with all informations and settings for this Link-Element.

Execute Fetch

To test the Fetch, result will be shown in the Result Tab.

Generate Tree >>>

To see how the Tree will look like in WMM.

Load Fetch

To load a saved Fetch (.xml File). After Loading, WMMFG automatically triggers [Format Fetch] and [Import Fetch]!!

Generated Tree

- ☐ Kampagnenaktivität
- ☐ Kampagnenaktivität
- ☐ Kampagnenaktivitätselement
  - ☐
  - ☐ Liste (Marketingliste)
    - ☐ Liste
    - ☐ Name

Save Fetch

To save the current Fetch (as .xml File), so you can reload it any time to manipulate it.

>>> GENERATE FETCH <<<

The other way round. So if you started from 0, or you've changed your current Fetch press on this Button. Now the current Fetch will be replaced with the new one, as you created/modify it.
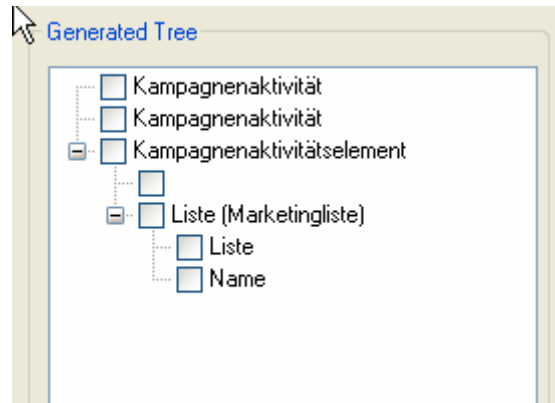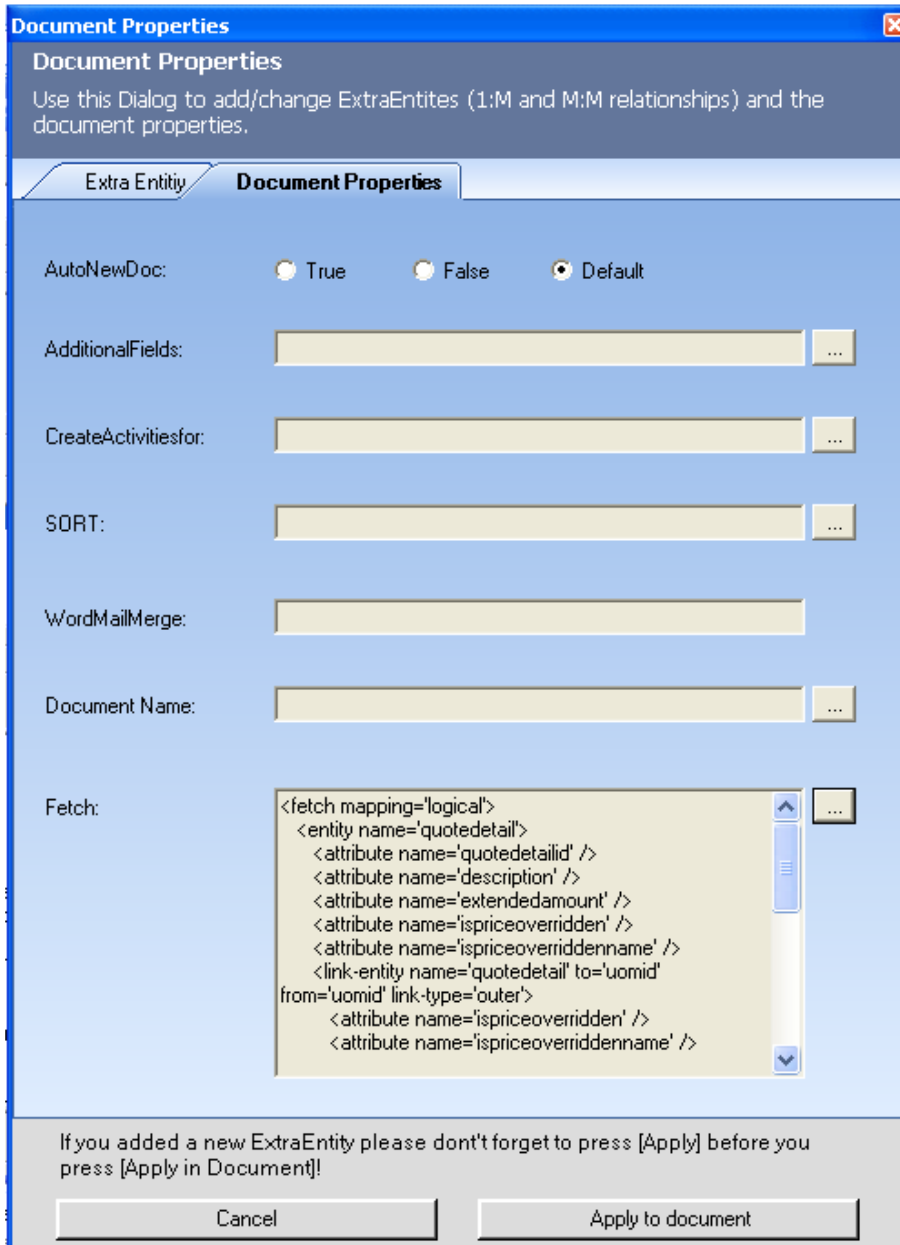
4 Allocate to Template

Afterwards the fetch has to be saved to the template.
Therefore open MS Word and go to [WordMailMerge for MS CRM 3.0]->[Insert MailMerge fields]->[Document Properties]

Insert the fetch into the Fetch-sector:

After pressing [Apply to document] the tree will be generated out of the Fetch-XML. Then use WMM as usual.

5 Contact

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