



Documents Core Pack for MS CRM 4

Version 4.0

Users's Guide

(How to use Documents Core Pack for MS CRM 4)

Table of Contents

1	USERS GUIDE	4
	1.1 Introduction	4
2	DOCUMENTS CORE PACK TEMPLATES	4
	2.1 How to create Documents Core Pack Templates	4
3	CREATE A MAIL MERGE WITH ONE RECORD	10
	3.1 Features	10
	3.2 Prerequisites	10
	3.3 Step-by-Step description	11
	3.4 Send as PDF	14
4	CREATE A MAIL MERGE WITH MANY RECORDS	20
	4.1 Features	20
	4.2 Step-by-Step description	20
5	GENERATE A NEWSLETTER AND SEND IT PER EMAIL	29
	5.1 Features	29
	5.2 Step-by-Step description	29
6	CREATE A MAIL WITH ONE RECORD	32
	6.1 E-mail property	34
7	E-MAIL DELIVERY REPORT	34
8	DOCUMENTS CORE PACK SETTINGS TABS	35
9	USING "SAVED VIEWS" TO SELECT RECORDS	36
10	CREATING LETTERS USING THE MARKETING LISTS	41
11	RELATIONSHIPS BETWEEN ACCOUNTS AND CONTACTS	43
12	DOCUMENT PROPERTIES	47
	12.1 Overview	47
	12.2 How to configure Sharepoint / Fileshare – paths	54
	12.3 Step by Step description (build 1:n relationships)	57
	DOCUMENTS SUMMARY & LINEITEMCOUNT	60
	12.4 LinItemCount	60
	12.5 Document summary	61
13	CONTACT	62

1 USERS GUIDE

1.1 Introduction

Documents Core Pack for MS CRM 4 is a Microsoft CRM Add-On which gives you two possibilities of how to use it.

1. Make mail merge in MS Word with many records.
2. Make a mail merge with one record directly out of the web client.

But first of all we want to show you how to create Documents Core Pack templates.

2 Documents Core Pack Templates

Documents Core Pack Templates are predefined Word Templates which have some mail merge fields in it. For each MS CRM Entity (e.g. account, contact,...) you can define different Templates.

For example you have an "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 Documents Core Pack includes this "Account reconnect" template. Test this behaviour and open an account in the Web Client and click on the "Print in Word" Button.

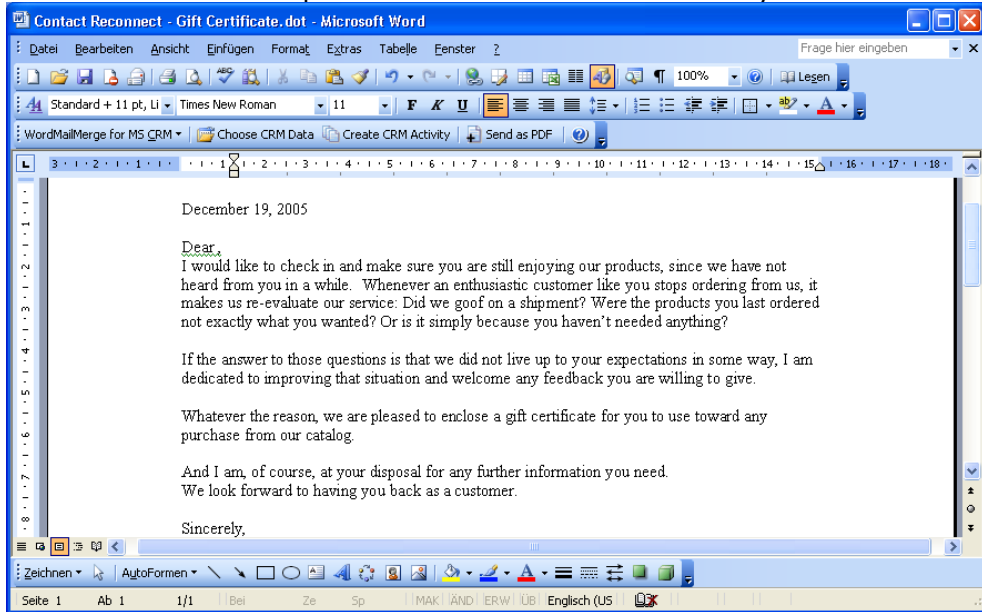
2.1 How to create Documents Core Pack Templates

Read the "Getting Started" – Document to get more information about the creation of Documents Core Pack Templates.

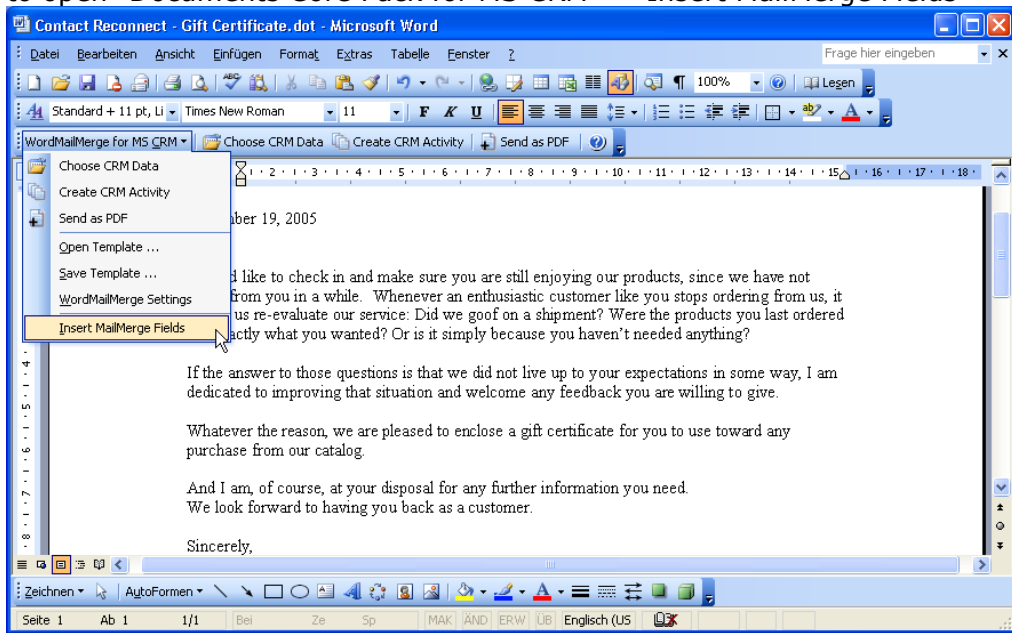
With the following steps you can create a Documents Core Pack Template:

1. Start MS Word

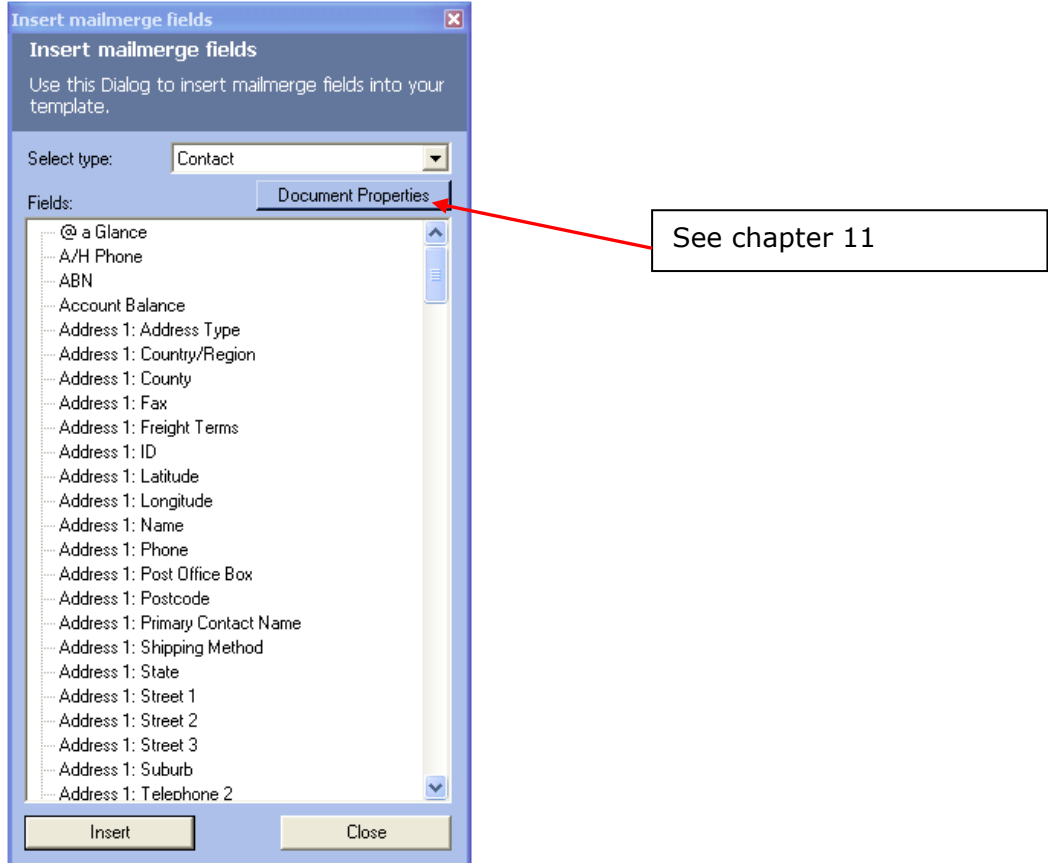
2. Write the content or open a document with the content you need.



3. As next step we add the MS CRM fields to the content. To do this we have to open "Documents Core Pack for MS CRM"->"Insert MailMerge Fields"



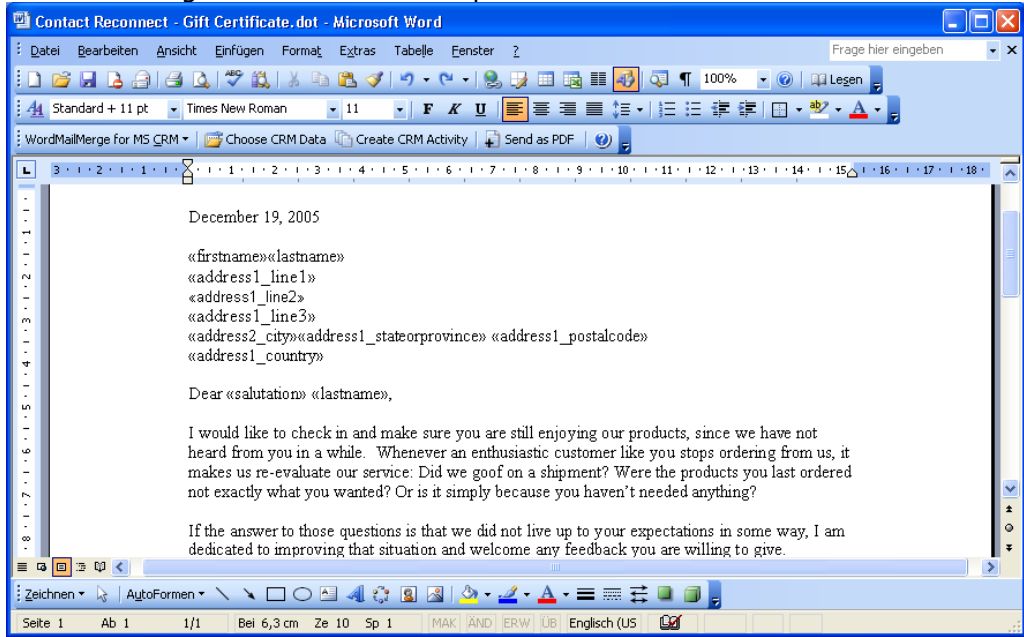
4. Then the following window appears:



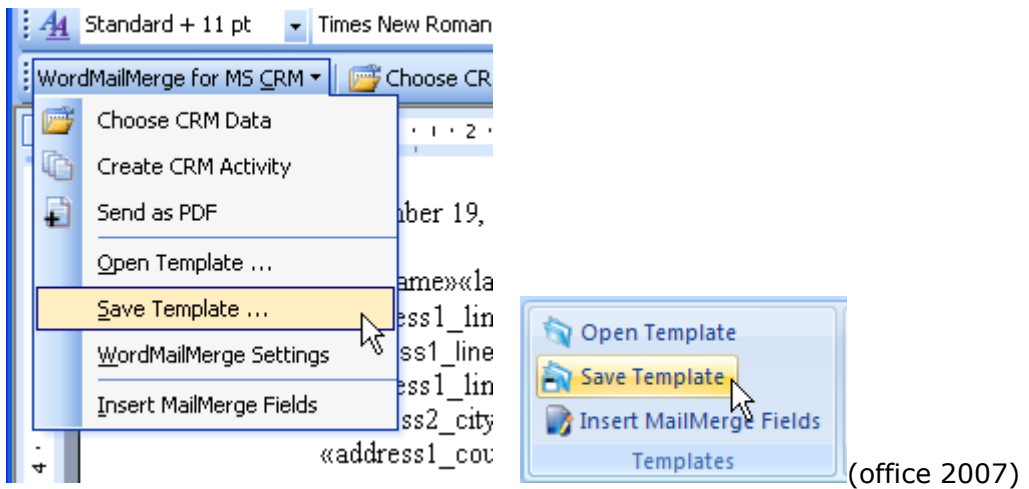
First select the type of template you want to generate. For each type of entity there are different mail merge fields and so when entity "Contact" is selected this template will only work with "Contacts". In our example we select "Contact"

With a double click on the different fields or by selecting fields and clicking on insert you can add fields to your template

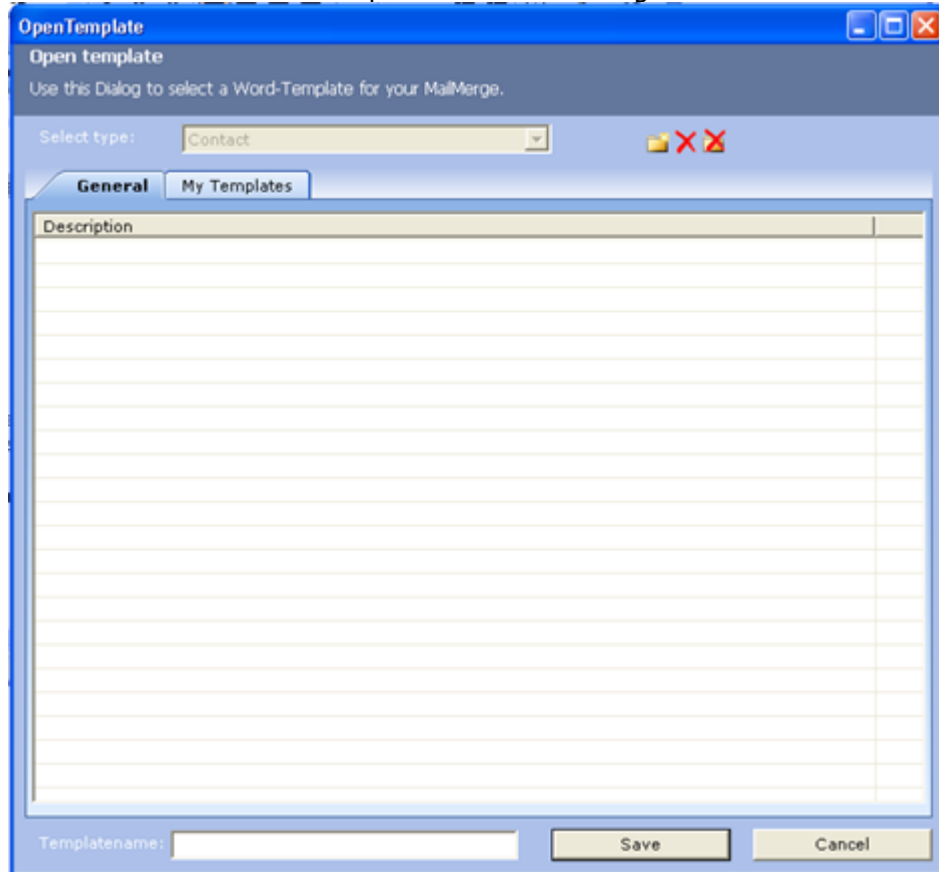
5. After inserting some fields the template should look like this:



6. As next step we have to save the template with "Documents Core Pack for MS CRM"->"Save Template"



7. Enter the Name of the template in the following window:

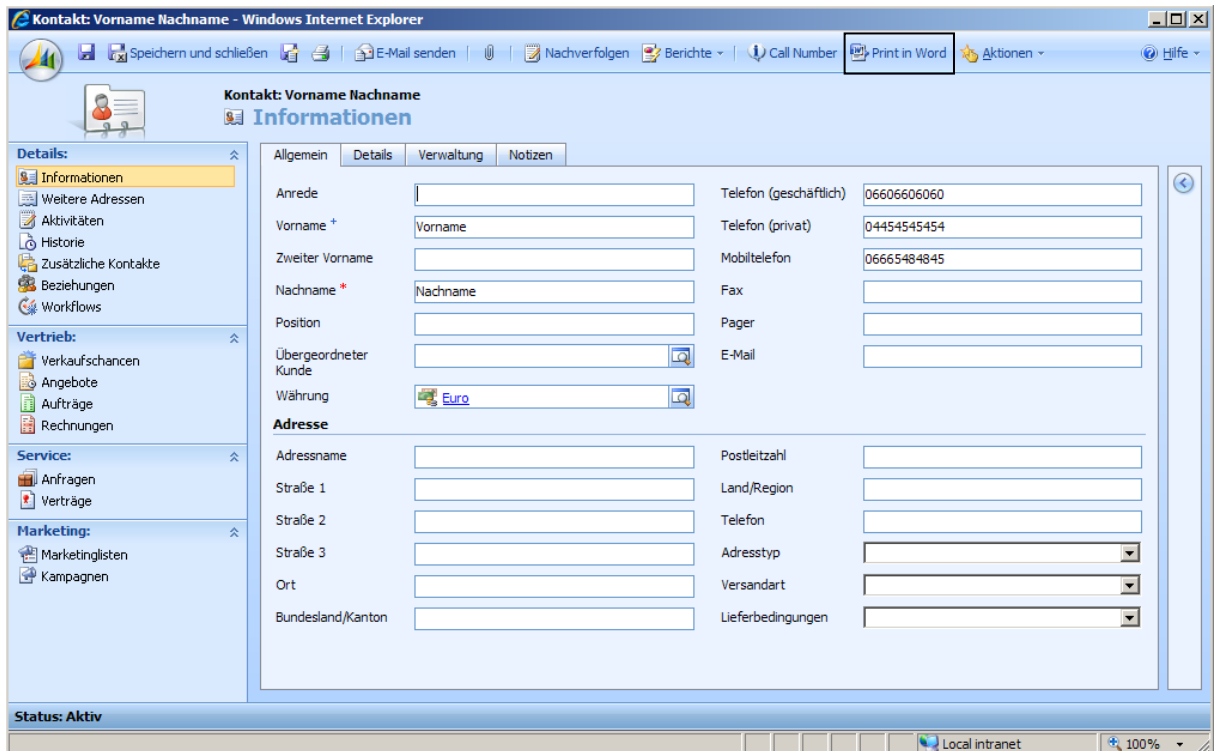


In this window you can enter the name of the template you generated and also you can define in which group the template should be saved. If you save the template in the "My Templates" group it will not be possible for other users to see this template.

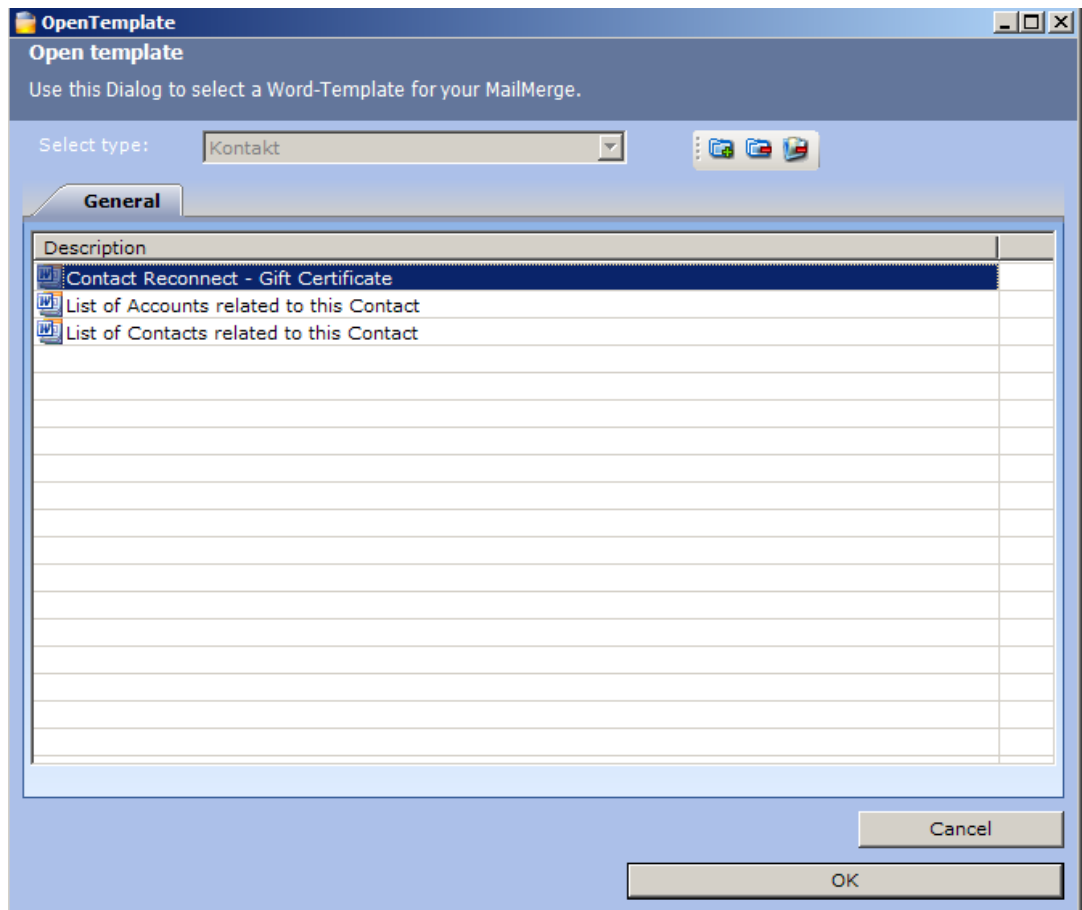
Other possibilities in this window:

- generate new groups
- delete groups
- delete templates

Now open the MS CRM Web Client and select a contact



8. Click on the "Print in Word" Button and you will see your generated template



9. Select the created template and click "OK". As a result you will get a letter where your defined mail merge fields are filled with data from the MS CRM Contact you selected.
10. To create a letter activity in MS CRM with the created template click on the "Create CRM Activity" Button in MS Word. The content of the MS Word – document will be automatically used as a description. For a detailed description of this feature go to the next chapter.

3 Create a mail merge with one record

3.1 Features

With the **Documents Core Pack** you can directly start to merge one contact, account, ... with a template from the **web client**.

In this example we will merge the data of a MS CRM quote with a template which comes with the Documents Core Pack Server Components. This example works in the same way for leads, contacts, ...

It should show you how simple it is to take a quote with all data, also **custom fields**, and generate a Word Document. At the end we write back the generated document to MS CRM and also show you how to send this as PDF to your customer.

3.2 Prerequisites

Client:

Documents Core Pack Client Component for MS CRM 4

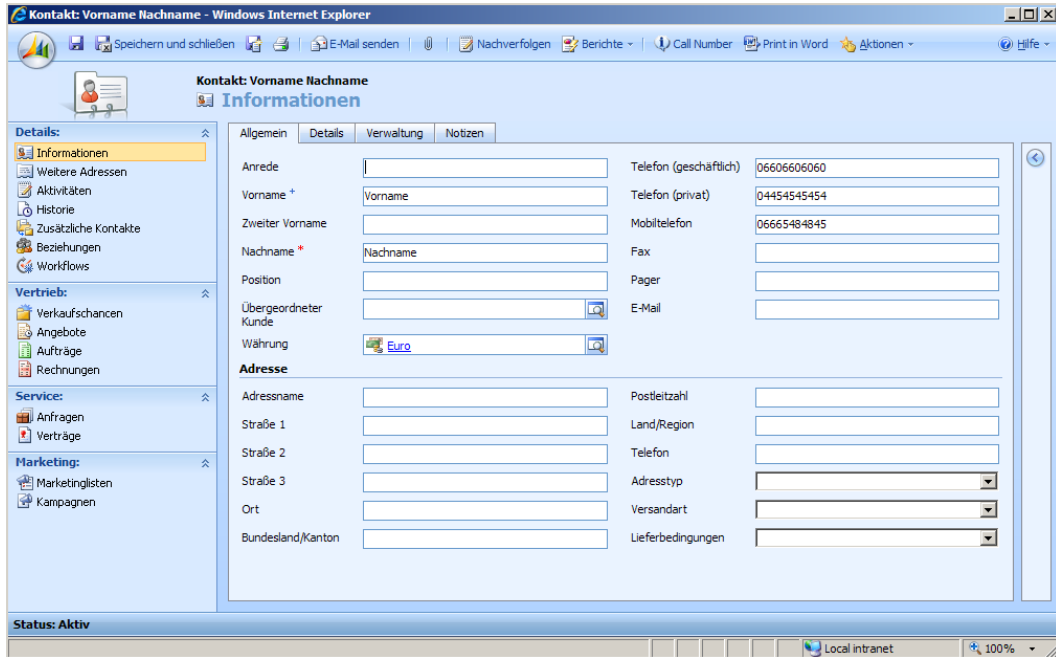
Server:

Documents Core Pack Server Component for MS CRM 4

3.3 Step-by-Step description

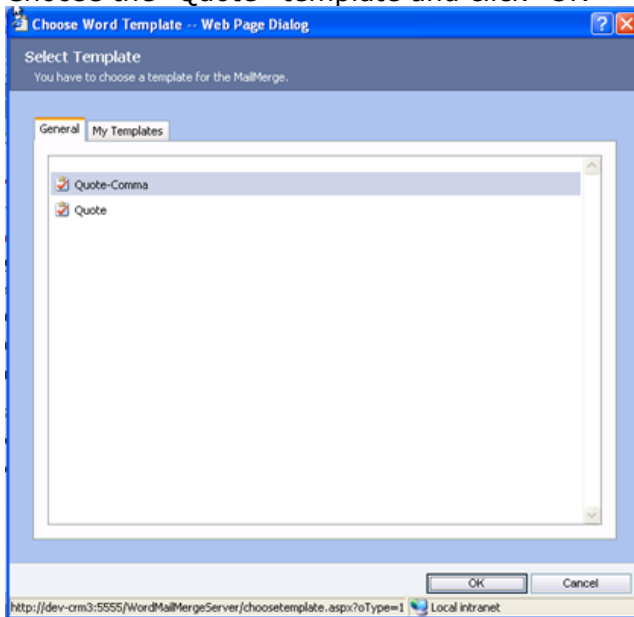
Step 1: Open a quote and click on the new button 'Print'

The Administrator can define how this button is named when he is installing the **Server Component of Documents Core Pack Add-On**. So the name of the button could be different.

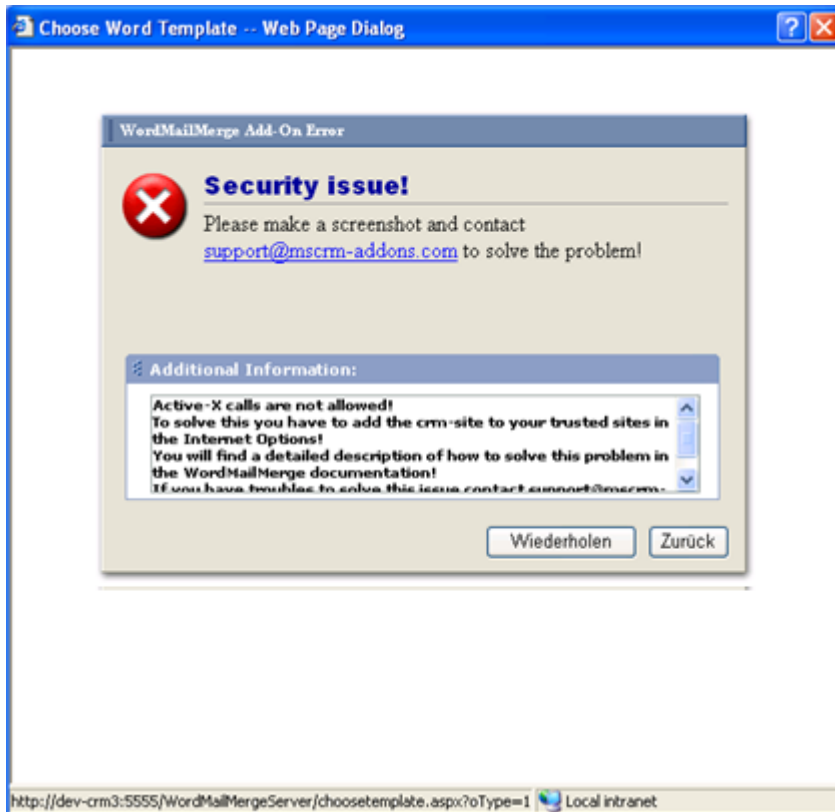


Step 2: Select a template

A window appears which allows you to select the template you want to use. Choose the "Quote"-template and click "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.

Test-Quote
Generated with WordMailMerge for MS CRM 3

Quote

To:
Northwind Traders
567 Kennedy Boulevard
98291 Laredo
U.S.

Companyname,
Street1,
9999 City of your companz,
Austria,
Tel: +99 8888 9999,
Fax: +99 8888 9999 21.
www.mscrm-addons.com

Your Reference:
Gail Erickson

QuoteNr: **95** Graz, november 30, 2005

Part Nr	Description	Unit	Quantity	Price (€)	Amount (€)
BIK-R68R-48	Road-450 Red, 48 A true multi-sport bike that offers streamlined riding and a revolutionary design. Aerodynamic design lets you ride with the pros, and the gearing will conquer hilly roads.	Single	6,00	1.650,97	9.905,82
Sub Total					9.905,82

Quote Discount: **213,94**

Packaging & Shipping: **775,52**

Total Tax: **792,35**

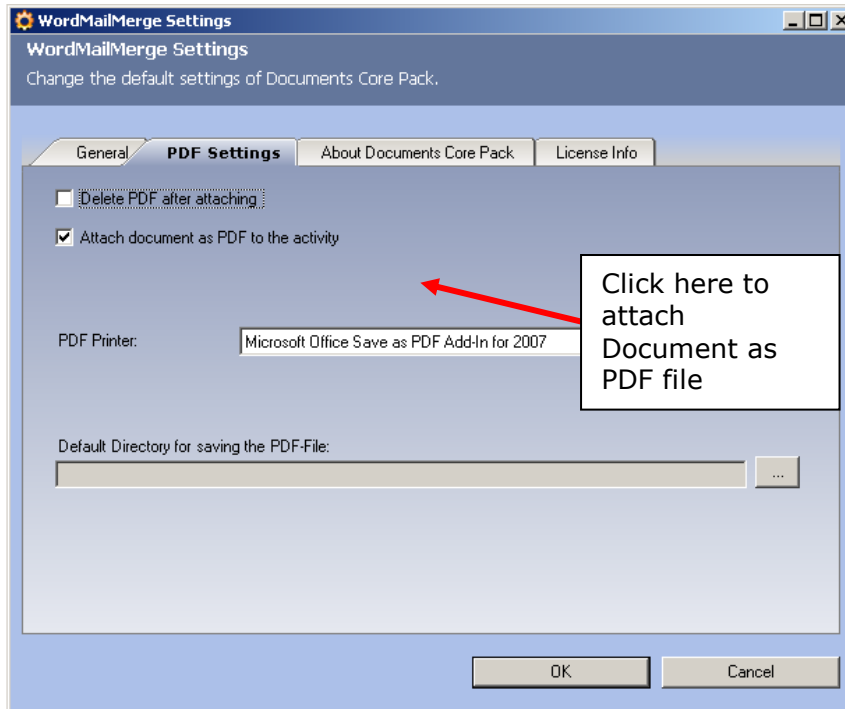
Total Amount for this invoice: **11.259,75**

Payment conditions: 2% 10, Net 30

3.4 Send as PDF

STEP 4 Selecting the Documents Core Pack settings

Before creating a Crm Activity please choose in which form the document should be saved! Here you can define between a **Word.doc** and a **PDF file**



PDF Printer:

- MS Office Save as PDF Add-In for 2007 ([free Download](#))
- PDF Creator ([free Download](#))

Step 5: Write back the letter activity to MS CRM

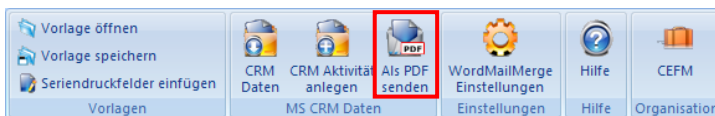
You have two possibilities to write back this letter as activity into MS CRM. It depends on what you want to do.

First solution is to click "Create CRM Activity" - Button. With this button you can create a letter, email or fax activity with this document.

Second solution is to click "Send as PDF" – Button. This button gives you the possibility to create a PDF out of this word document and send it as Email.



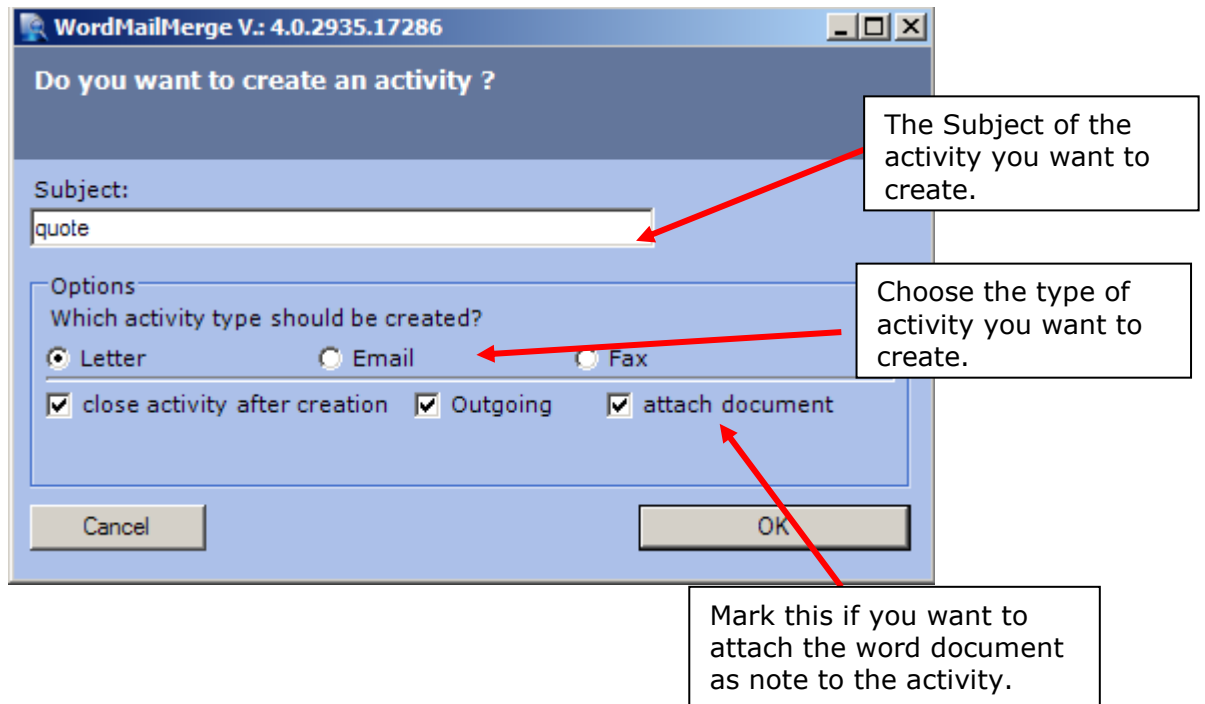
(office 2003)



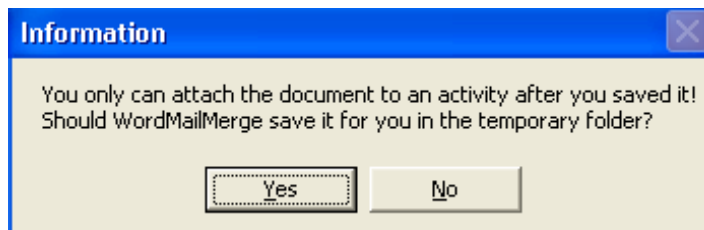
(office 2007)

Step 6a: Click on "Create CRM Activity"

After clicking on "Create CRM Activity" you will get the following window:



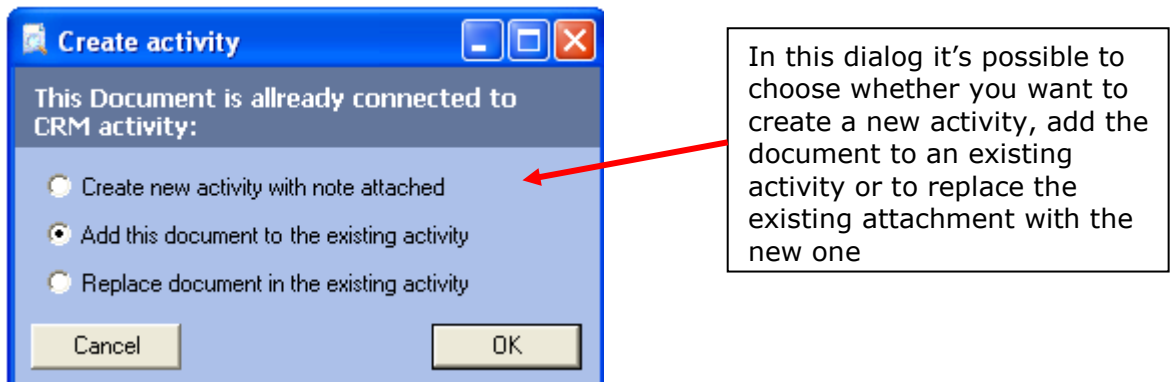
If you checked the "attach document" checkbox and your word document is not saved, you will get the following message.



If you click on "Yes" Documents Core Pack will save the document into a temporary folder and attaches this document to your activity.

Since version nr. 2.1.0.11 we implemented a version control.

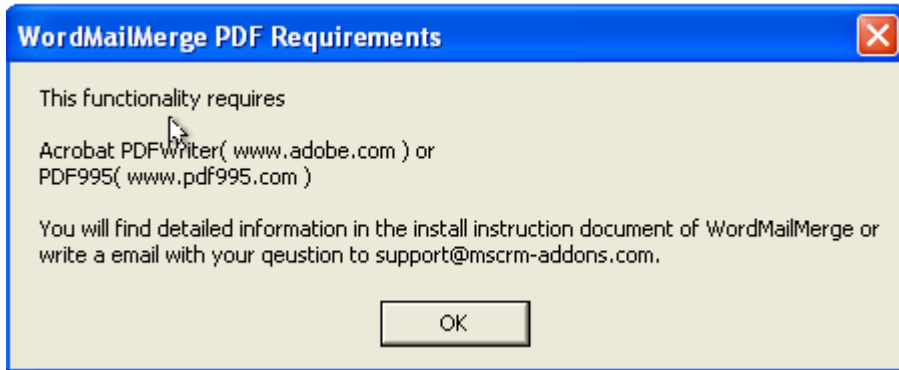
If you want to create an activity with an attached document from which an activity has been created before, you'll see following dialog:



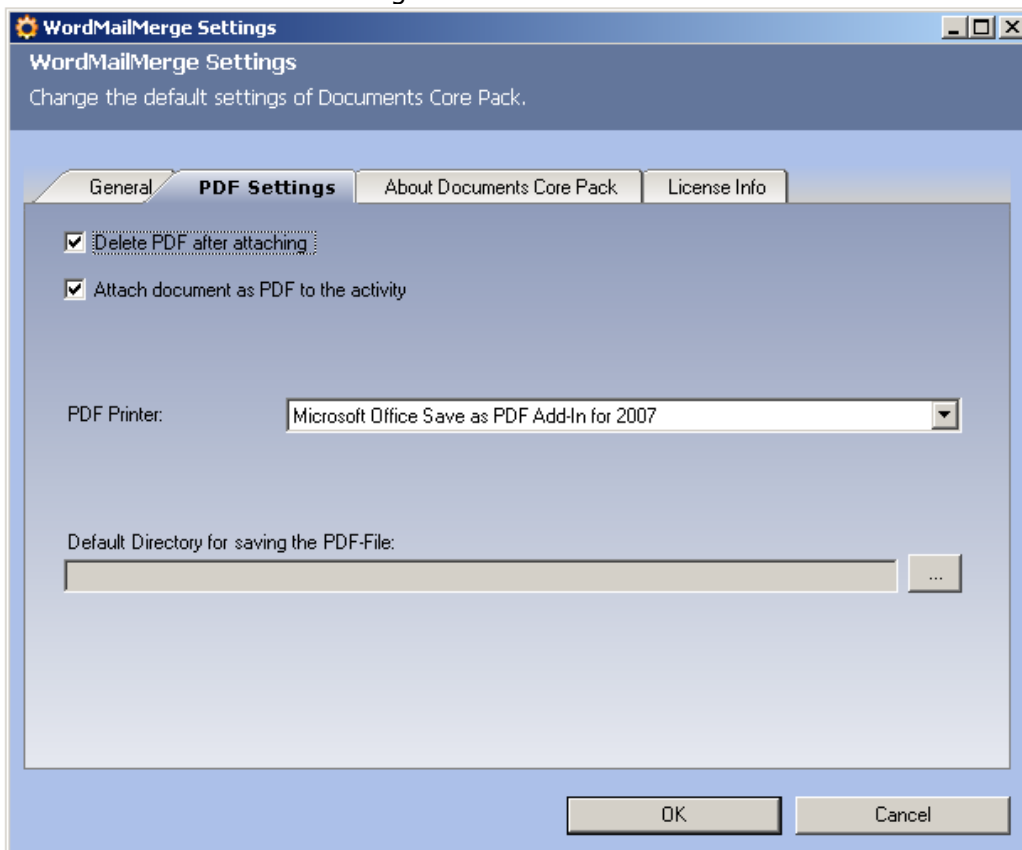
Step 6b: Click on "Send as PDF"

This functionality needs the "Acrobat PDFWriter" , "PDF995" or "PDFcreator"(since DCP v4.0).

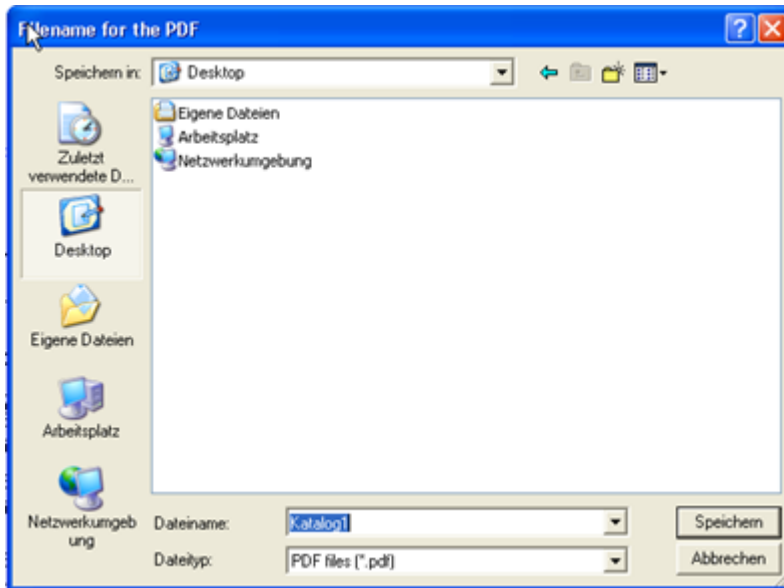
If none of this PDF Creators are installed you will get following message:



You can define if you want to delete the pdf after attaching it to the e-mail. Further it's possible to define a default location for the generated pdf – files. Therefore you just have to click on "Documents Core Pack for MS CRM 4"-> "Documents Core Pack settings" -> "Send as PDF".

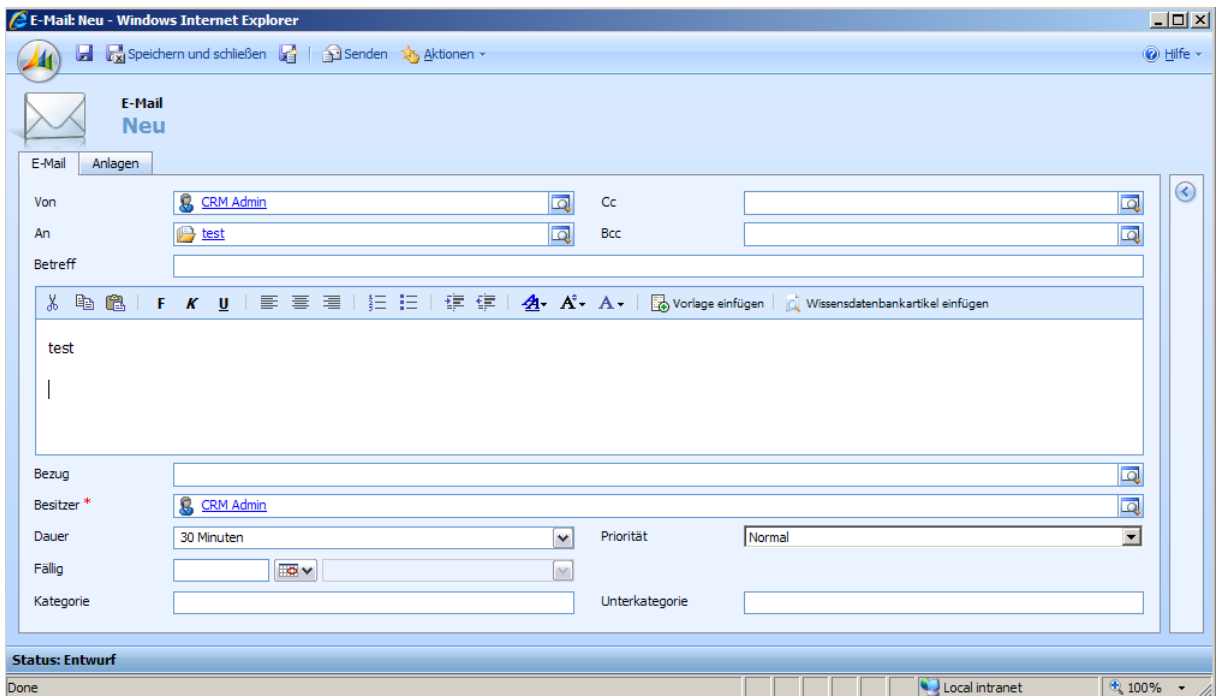


First you will be asked for the filename of the PDF you want to generate.

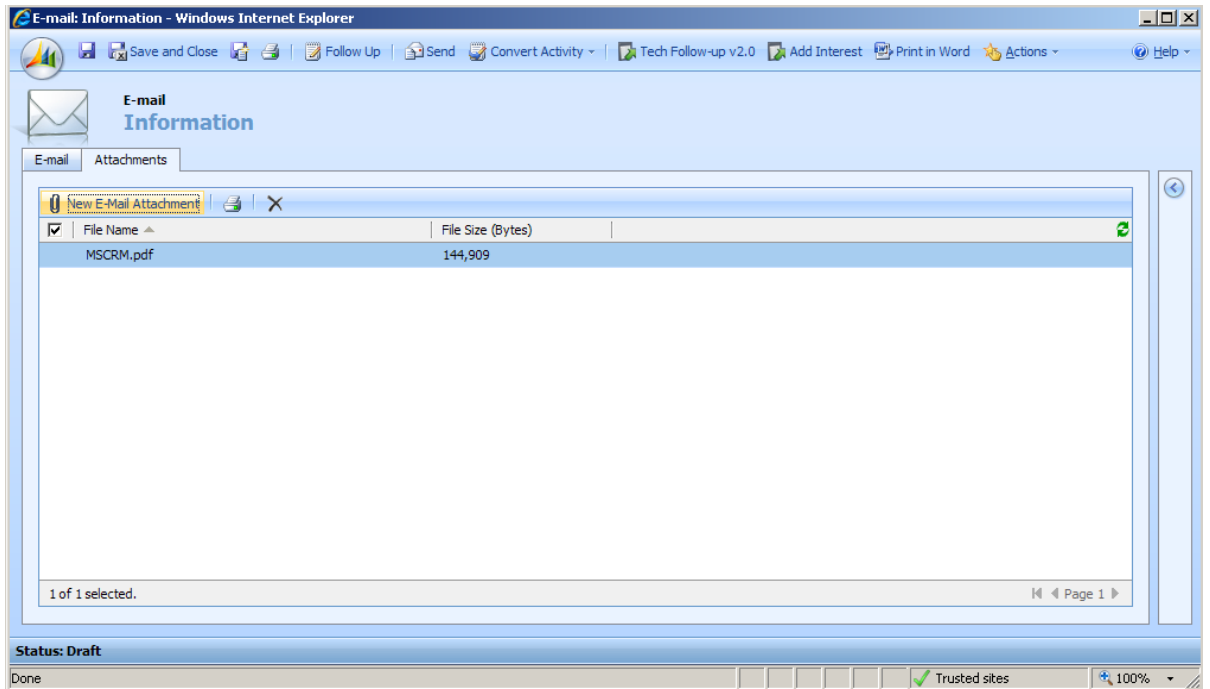


Step 6c: Result

The result is that the following window appears and you can change the recipient, subject, ... before sending the email with the attached PDF.

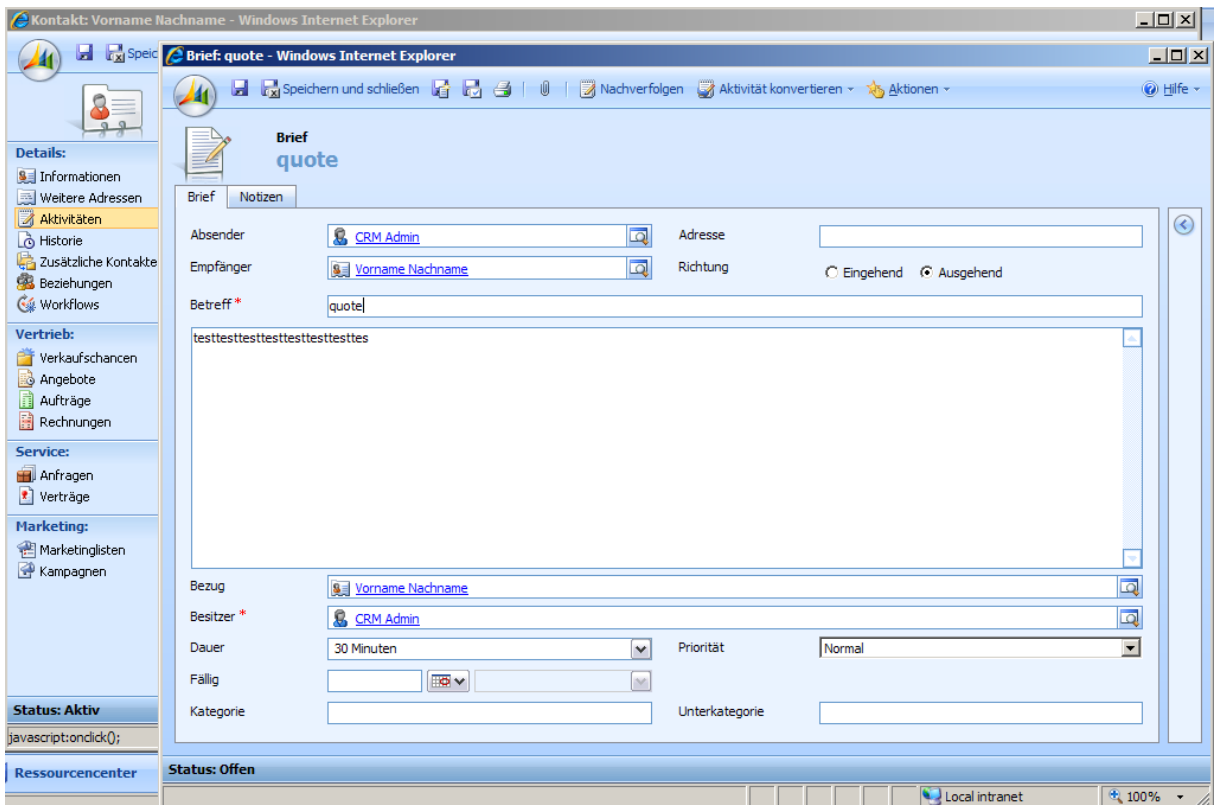


Change to the "Attachments"-tab and you will see the attached PDF.



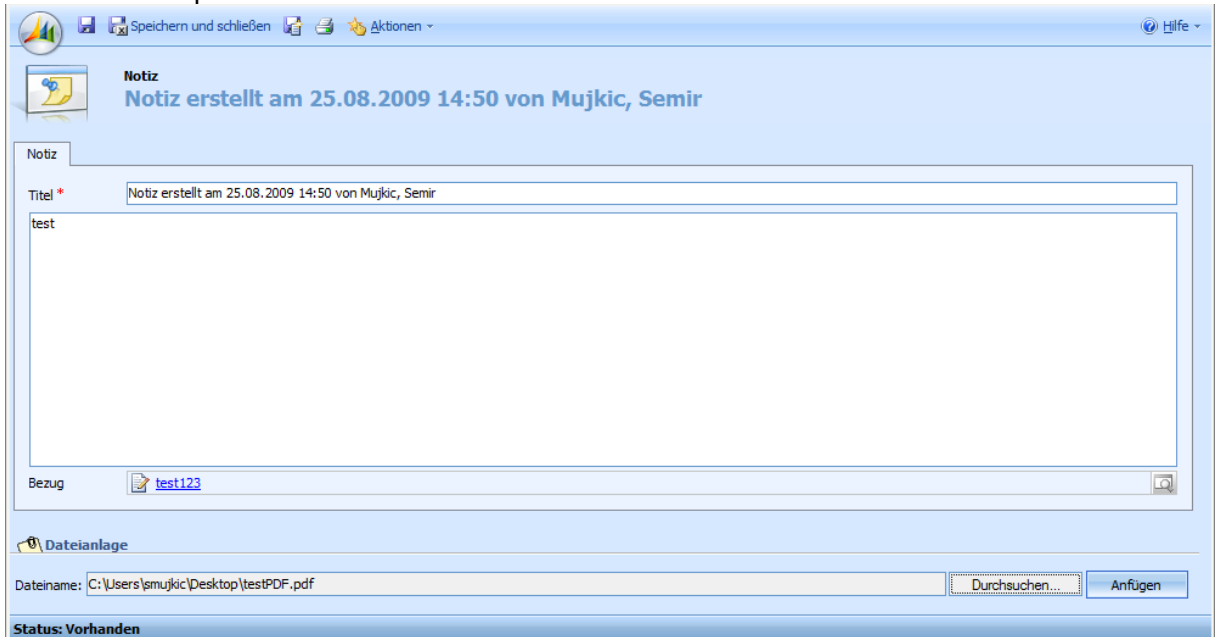
Step 7: Result

After opening the history activities of the quote you will see the new letter activity and that the content of the word document is inserted as description.

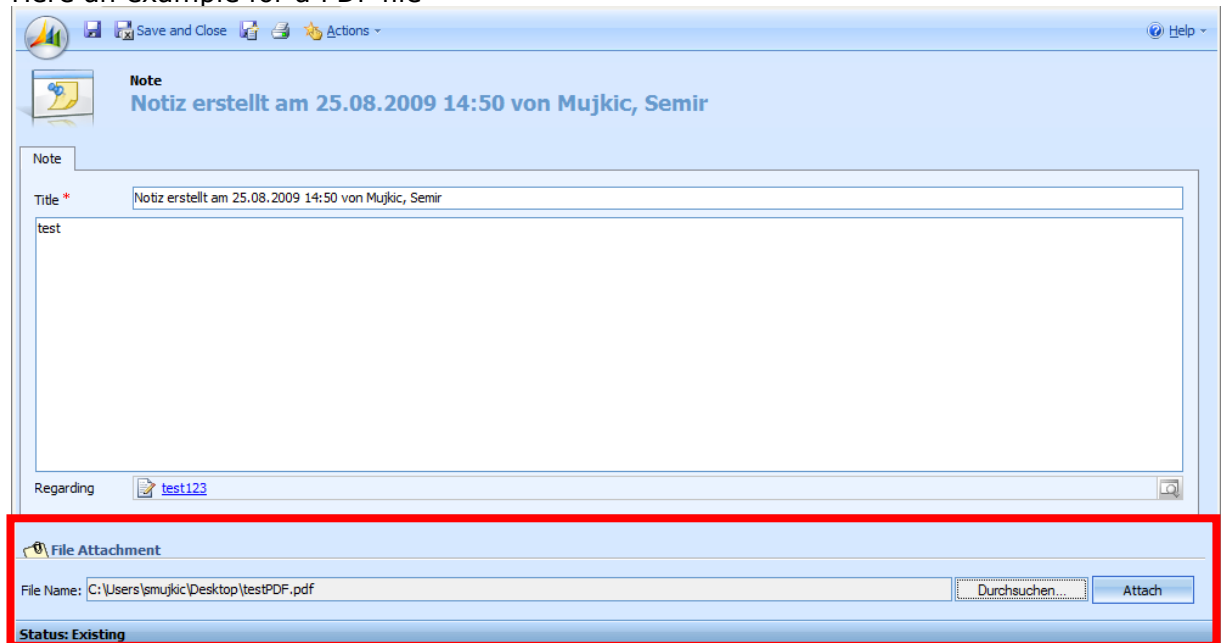


Further more you see that your word document is attached as a **doc** or as a **PDF** file.

Here an example for a .doc



Here an example for a PDF file



4 Create a mail merge with many records

4.1 Features

The **Documents Core Pack Add-On** has following advantages against the standard mail merge functionality:

- Choose which fields you want to use for the mail merge.
- You are able to use **custom fields, custom entities**.
- You could make a mail merge also with **nearly every entity**.
- Make the selection of the records in Word. No need for Outlook SFO.
- You are able to search for records thru related entities.(For example you can search for all contacts which have a parent account and this parent account appears to a specific category)
- The **Documents Core Pack** gives you the ability to create a mail merge and after that saves the documents to the CRM Object as an outgoing letter activity with the content of the Word-Documents as description.
- Send letters as PDF. The new "Send as PDF" button on the Word toolbar, gives you the ability to generate a PDF from a Document you generated with Documents Core Pack and send it per Email to somebody.

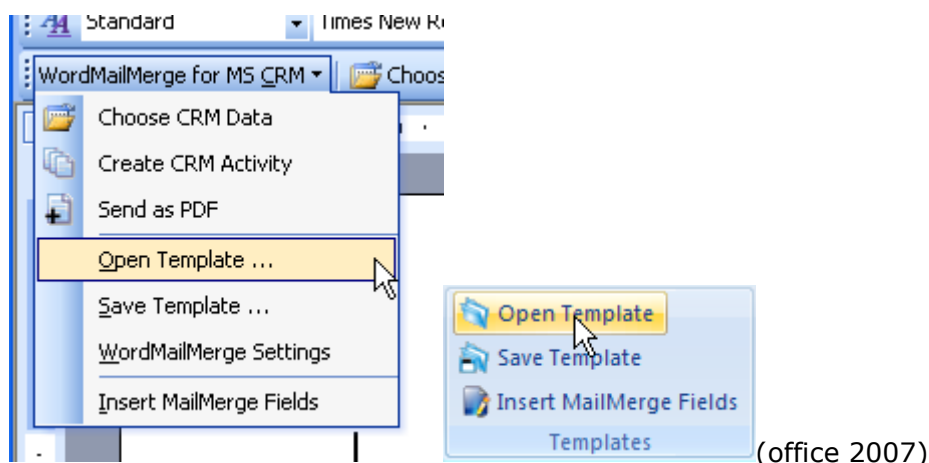
4.2 Step-by-Step description

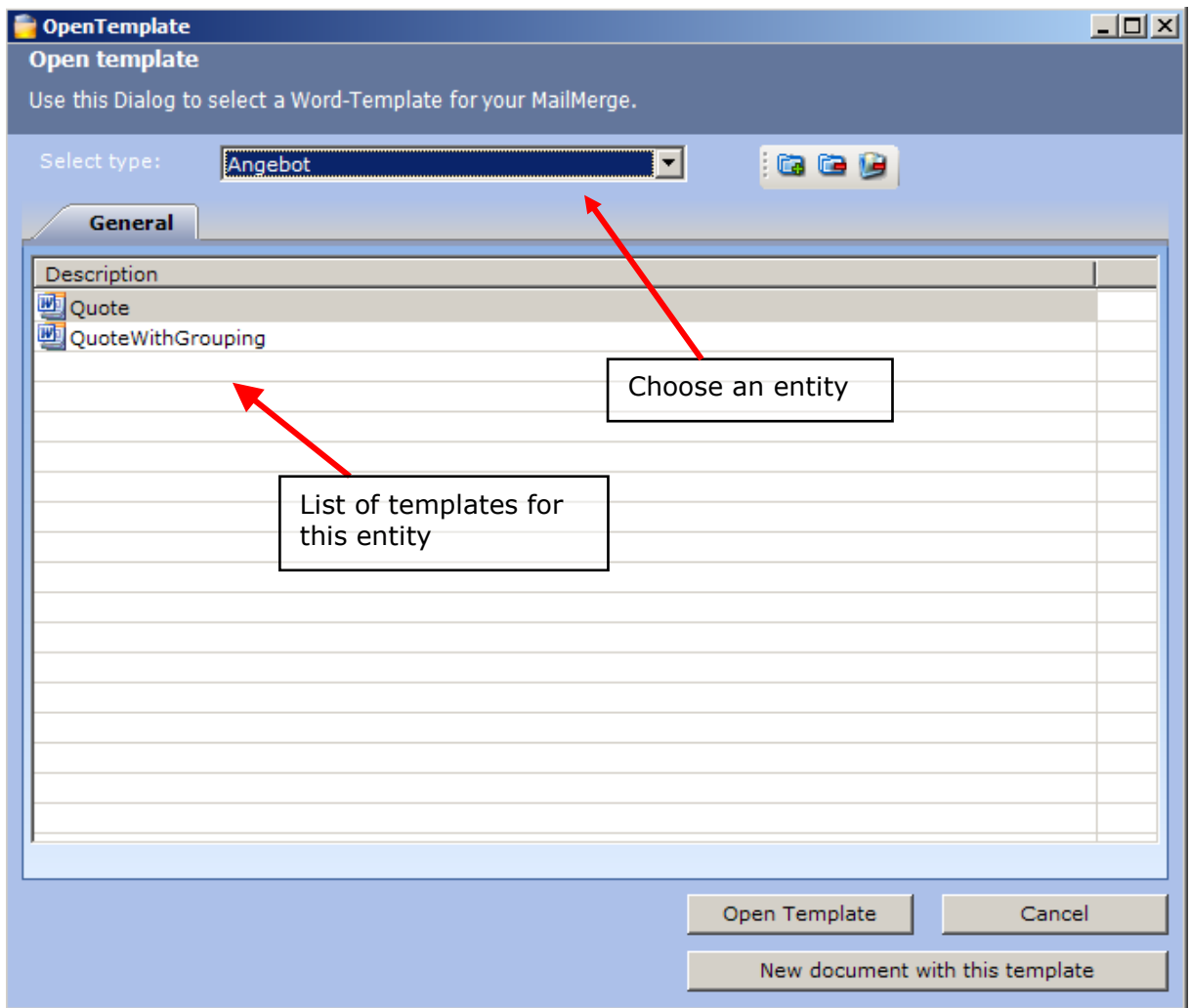
You will now see how simple you could make a mailmerge and how many possibilities you would have when you use **Documents Core Pack**.

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'.

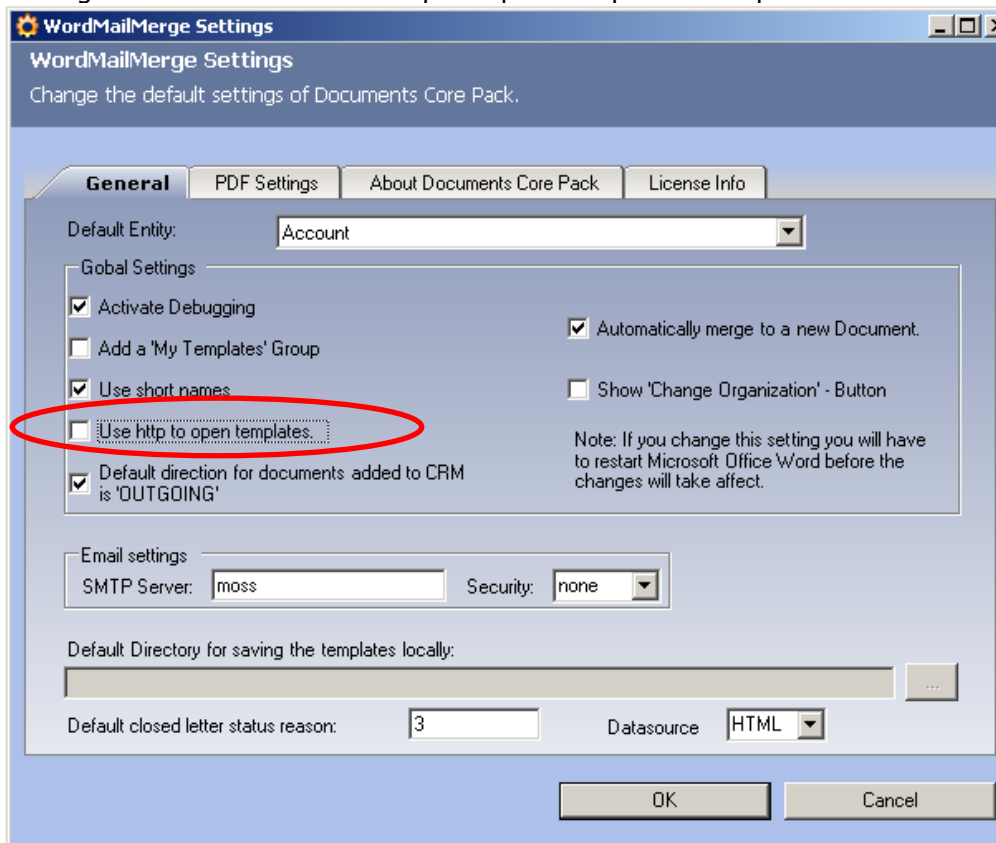




By clicking [Open Template] the Template itself will be opened (normally a .dot File), so you can change it.

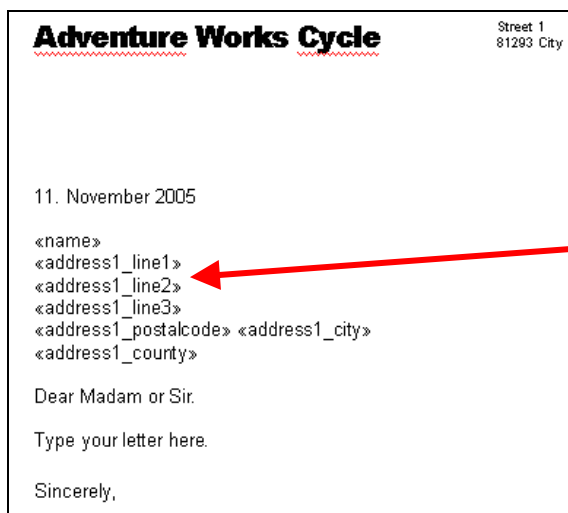
But we want to make a new document, so select the Template you want and then press [New document with this template].

It's also possible to open templates via http. Therefore we have to open the settings and check the "Use http to open templates" – option.



Remember, it is not possible to save templates via http. Here we would also recommend our Knowledge base, article : <http://support.mscrm-addons.com/default.aspx?kb=10033>

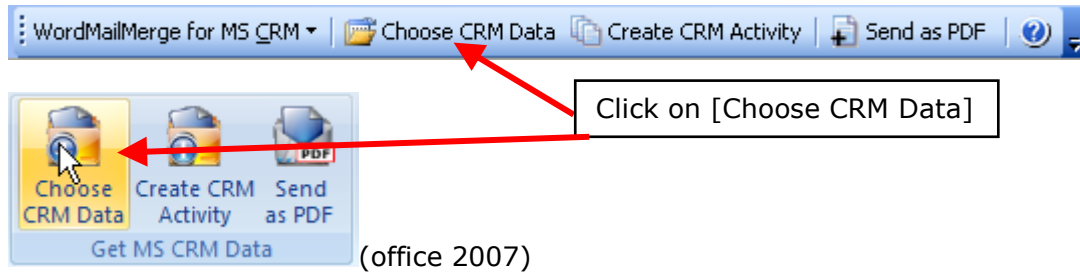
Now a new Word Document with your selected Template will be opened.



These are **merge fields** which will be filled with the data from MS CRM

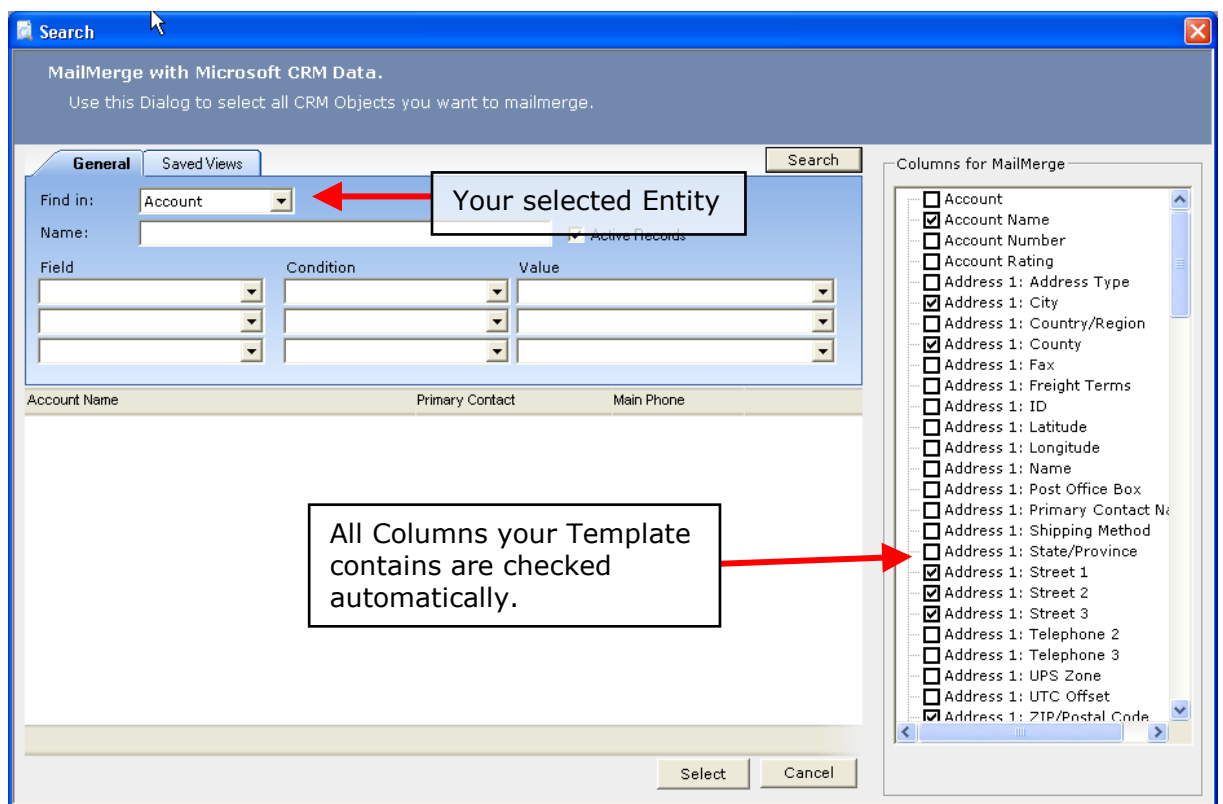
Step 2: Choose CRM Data

To choose now the CRM records you have to click on the 'Choose CRM Data'.



Step 3: Search Window

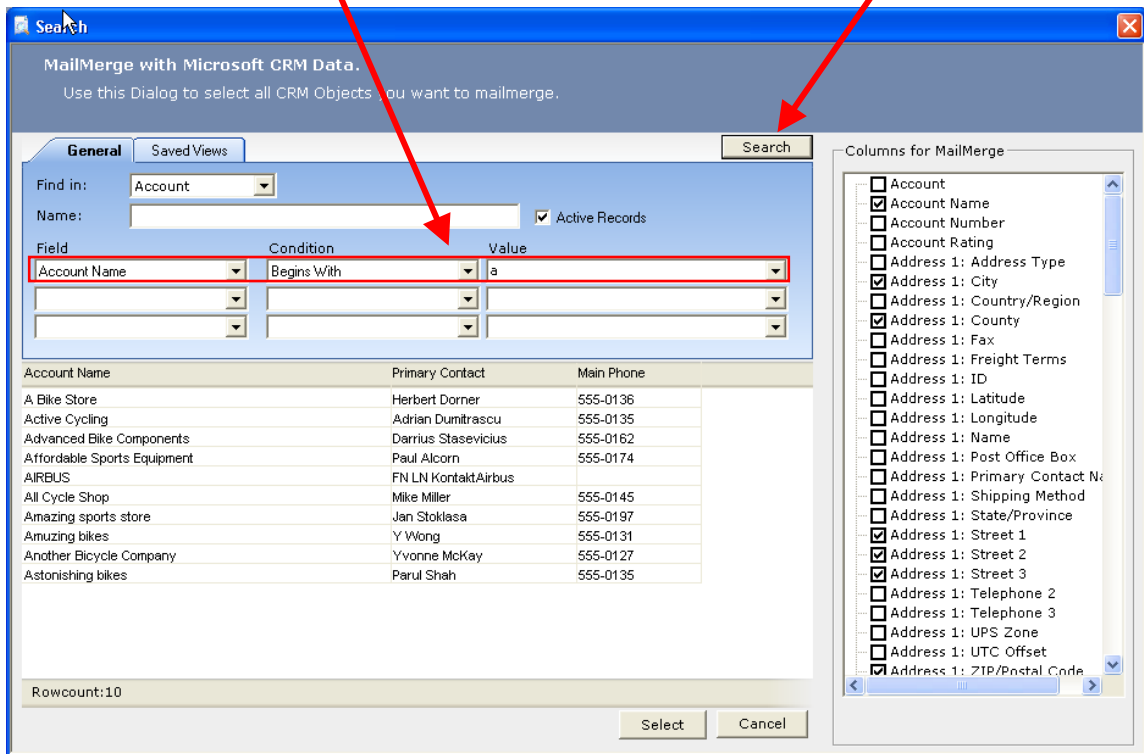
Now the search window appears.



Step 4-A: Enter search criteria

Now enter the search criteria to find the records for your mail merge.

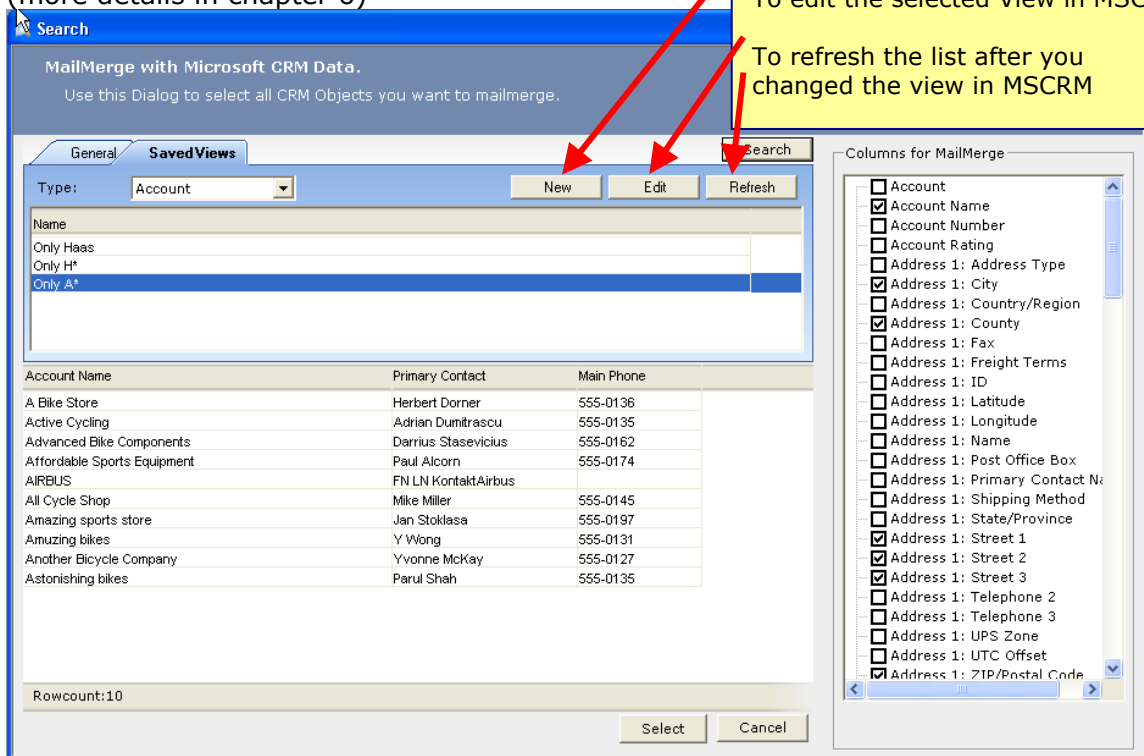
Then click the [Search] Button to start the search



Step 4-B: Using Saved Views

You also can use Saved Views which you defined in *Advanced Find* in MS CRM. (more details in chapter 6)

To create a new view in MSCRM
 To edit the selected View in MSCRM
 To refresh the list after you changed the view in MSCRM



Step 5: select columns for the mail merge (OPTIONAL)

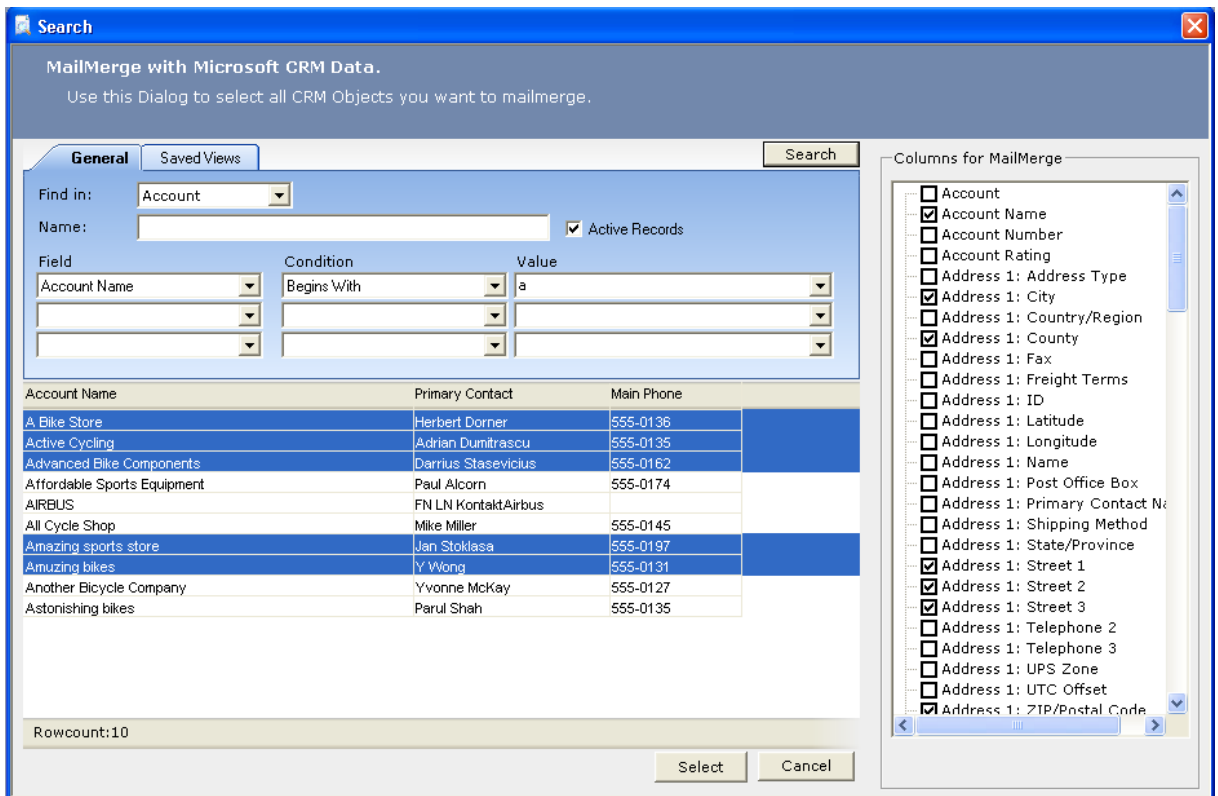
In this step you have to select the columns for your mail merge. This is optional because you only have to make this:

- If you create a really new Document
- if the you need some more/other columns or
- if the user does not need some columns for the template.

Step 6: select the records and click on the [Select] button.

Now we have found the records with the selection criteria you have entered and selected the columns for your mail merge.

As next step select the records for the mail merge and click the [Select] button.

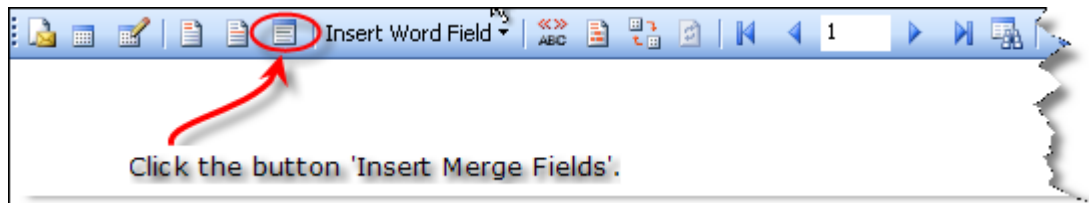


Step 7: change the template (OPTIONAL)

You are now back to the previous selected template. You can now change this template if necessary.

In our example we want to add the web site to the template.

For that we go to the end of the line '<<address1_County>>' and press Enter. Then click the button 'Insert Merge Fields'.



As next you will see the window 'Insert Merge Fields'. Select the 'accountid' and click on the 'Insert' button and then on the 'cancel' button.



Step 8: Click on the [Create CRM Activity]

With this button you have the ability to write the letter activities back into the MS CRM exactly in the accounts you have selected for this mail merge.

You can enter the subject of the activity and if the activity should be closed or not.

The screenshot shows a dialog box titled "WordMailMerge V.: 4.0.2935.17286" with the question "Do you want to create an activity?". The dialog contains a "Subject:" field with the text "quote". Below this is an "Options" section with the question "Which activity type should be created?". There are three radio buttons: "Letter" (selected), "Email", and "Fax". There are also three checkboxes: "close activity after creation" (checked), "Outgoing" (checked), and "attach document" (checked). At the bottom are "Cancel" and "OK" buttons. Red arrows point from text boxes to these elements: "Enter the subject of the letter activity." points to the subject field; "Set the type of activity." points to the radio buttons; "Click this button to create the activities." points to the OK button; "Check if the activity should be closed after creation." points to the "close activity after creation" checkbox; and "Check it if this is a document YOU created. ('A new outgoing Document.')" points to the "Outgoing" checkbox.

WordMailMerge V.: 4.0.2935.17286

Do you want to create an activity ?

Subject: quote

Options
Which activity type should be created?

Letter Email Fax

close activity after creation Outgoing attach document

Cancel OK

Enter the subject of the letter activity.

Set the type of activity.

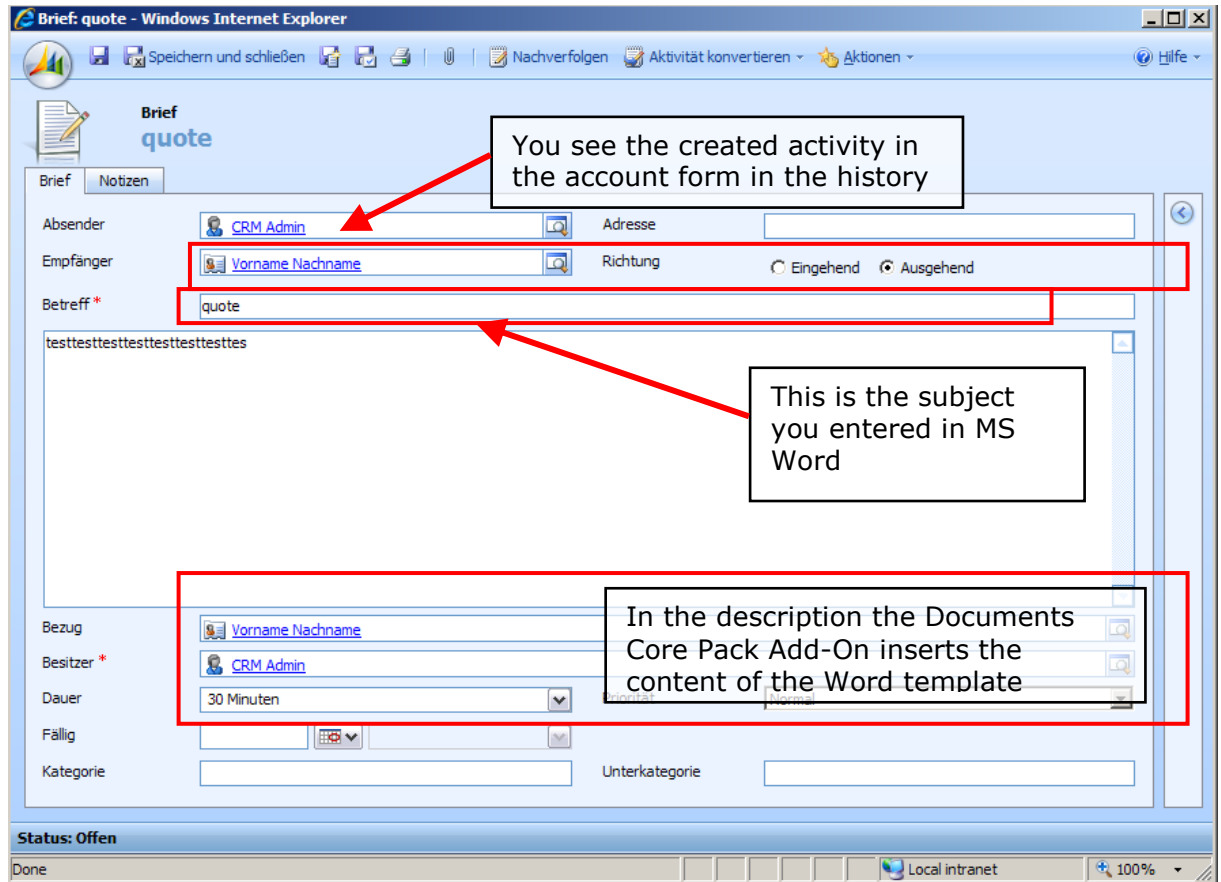
Click this button to create the activities.

Check if the activity should be closed after creation.

Check it if this is a document YOU created. ("A new outgoing Document.")

Step 9: Result

When we now open one of the selected accounts and going to the activities and select the history tab we see the new activity the **Documents Core Pack Add-On** created.



5 Generate a Newsletter and send it per Email

5.1 Features

The advantage of using this way to send Emails to CRM-Contacts or Accounts is that you can attach files to these Emails.

5.2 Step-by-Step description

Step 1: Generate a template

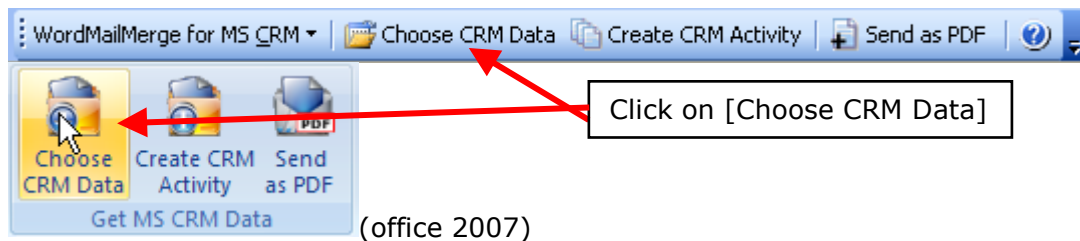
As first step you have to generate a word template for your Newsletter. (go to chapter 2).

IMPORTANT: The template has to have the field "E-Mail" in its text. (You can inserts fields with "Microsoft CRM" -> "Insert MailMerge Fields.")

If you do not want the email to be in the text of the newsletter then you can add it as an "Additional Field" (see: 11, Tappage 2, Additional Fields) but it has to be some where in the template.

Step 1: Choose Data

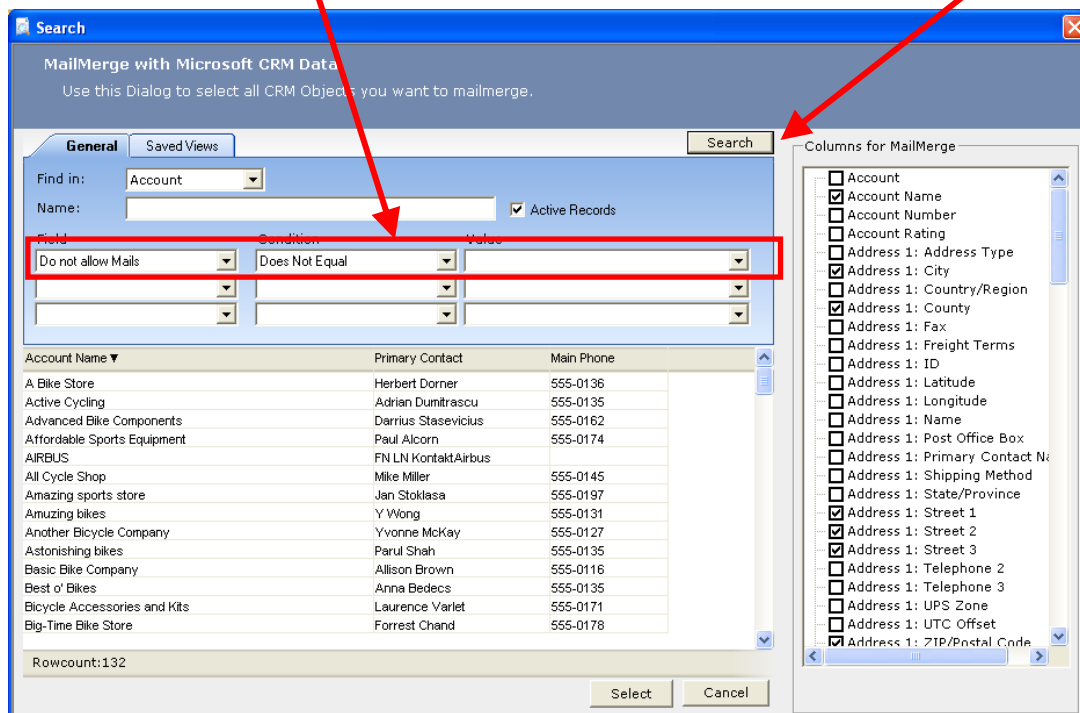
To choose the CRM records for your newsletter you have to click on the 'Choose CRM Data'.



Step 2: Search the contacts or accounts

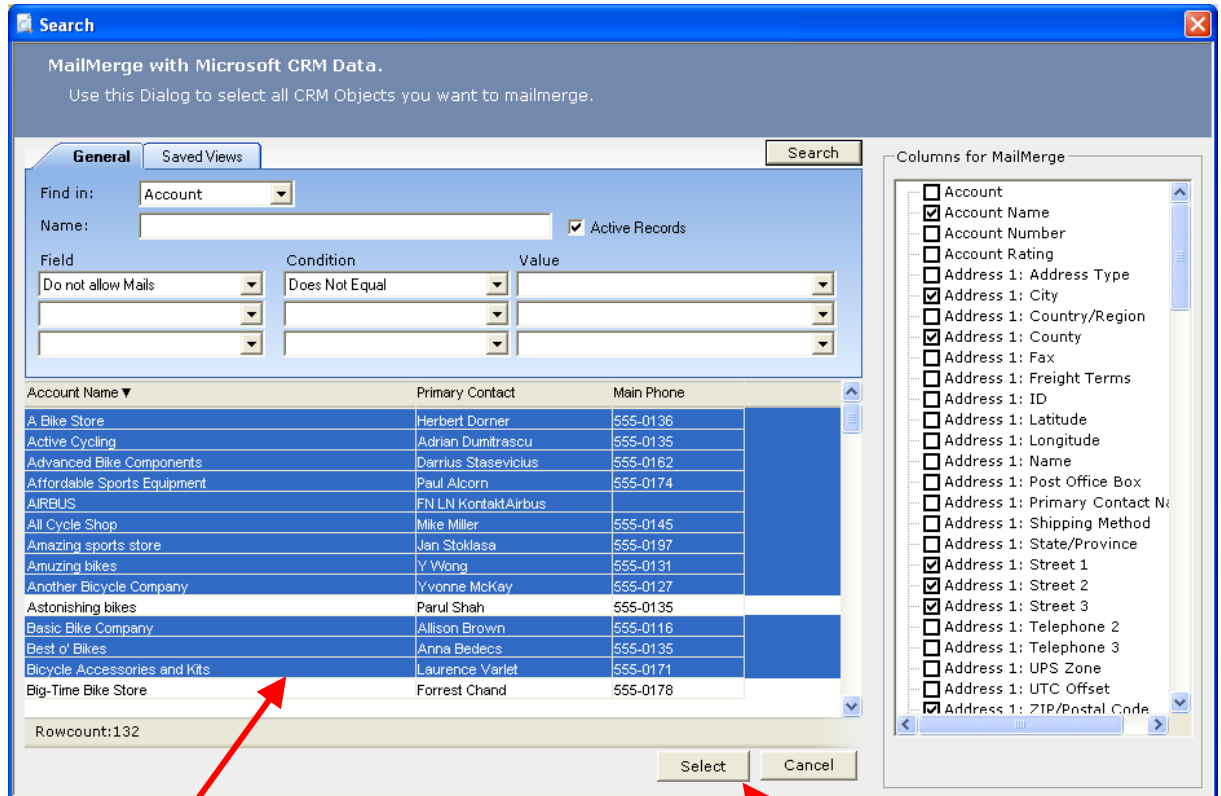
Enter search criteria to find the records.
(We need a list of email-addresses.)

Then click the [Search] Button to start the search



Step 3: Select the contacts or accounts

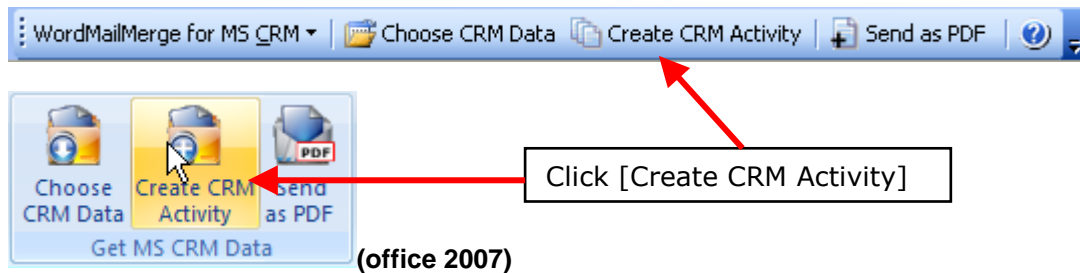
IMPORTANT: The newsletter will be send to the Email-address of the contact or account. For this you have to select in the right list box the column for 'E-Mail'. You can not change the behavior so that the **Documents Core Pack** uses another field.



1) Select the records.

2) Click the [Select] button

Step 4: Click CRM MailMerge



Step 5: Click the checkbox "Send the E-Mails" and enter the email address, user and password

To send now the emails and write the activities you have to check that as activity type **Email** is checked.

IMPORTANT: If you do not select the checkbox **Send the E-Mails** the Documents Core Pack only generates the activities in CRM but will not send the Emails.

IMPORTANT: The Email-address, User and Password field gives you the ability to send the newsletter with a different email-address. (For e.g. if you want to sent it as *office@mail.com*.) This field will be checked with the entries in the Exchange server. Should you want to send your email under a different name then this also possible here. Before entering the email address, insert a name like in the example : **"OFFICE (MSCRM ADDONS)" <office@mscrm-addons.com>**! You can enter any name between the "...". If the user does not have the right to send with this email-address you will get an error.

IMPORTANT: You can define any amount of attachments which will be sent with the emails. These attachments will only be attached to the email and not to the CRM-Email-Activity.

The screenshot shows the 'WordMailMerge V. 4.0.2935.17286' dialog box. The title bar reads 'Do you want to add an activity for every row you selected?'. The 'Subject' field contains 'mail'. Under 'Options', 'Email' is selected. The 'Send the E-Mails' checkbox is checked. The 'E-Mail-Address' field contains 'someone@example.com'. The 'User' and 'Password' fields are empty. The 'Attachment' field shows a file path: 'C:\Documents and Settings\crmadmin\Application Data\Microsoft\T'. There are plus and minus buttons next to the attachment field. Annotations with red arrows point to the 'Send the E-Mails' checkbox, the 'E-Mail-Address' field, the 'User' and 'Password' fields, and the attachment buttons.

Check it if you want to send the EMail.

Enter a Email-Address. This is the FROM address in the Email.

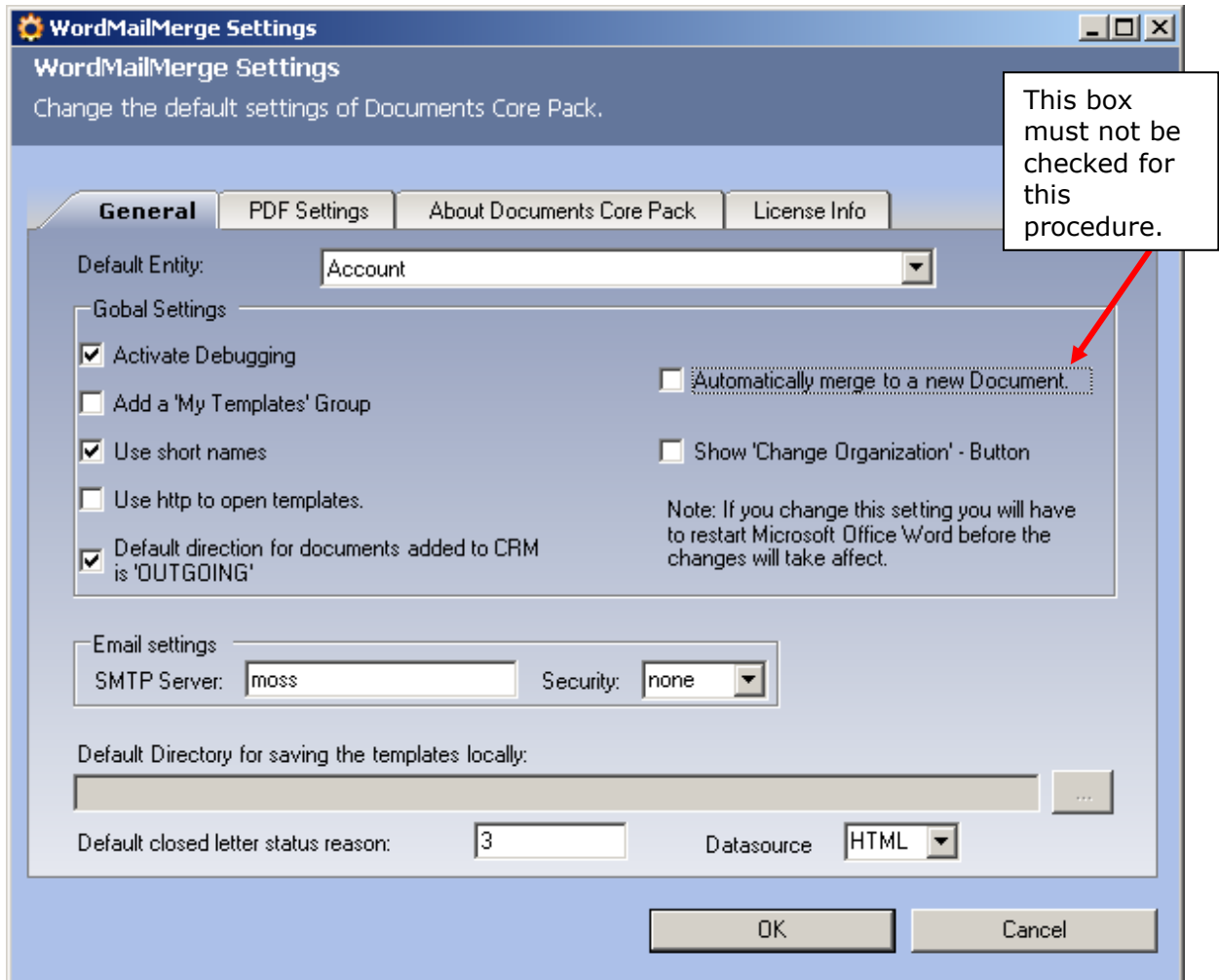
Enter the Username and Password. This user must have the rights so send emails for the email-address given above.

Use the plus or minus buttons to attach or detach the attachments that you want to send

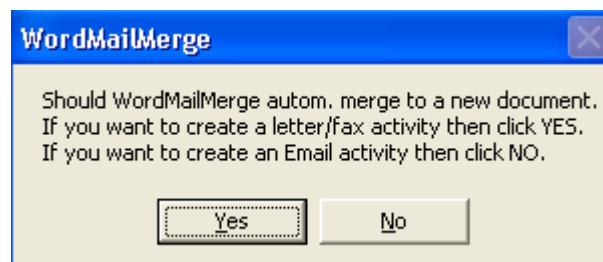
Step 6: Click [OK] to send the emails and create the CRM-activities.

6 Create a Mail with one record

Step 1: Make sure that the Documents Core Pack settings are set before you create the document!

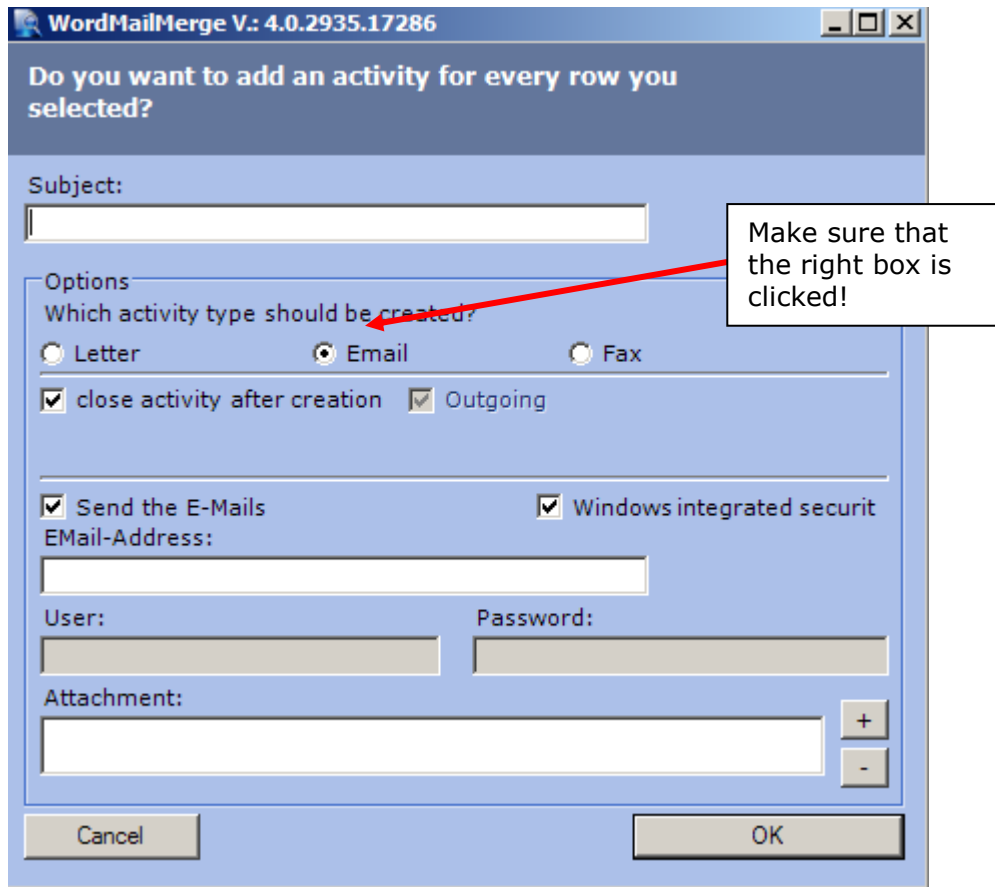


After creating the document pressing print in word, and choosing the Template, You will receive the next message box :

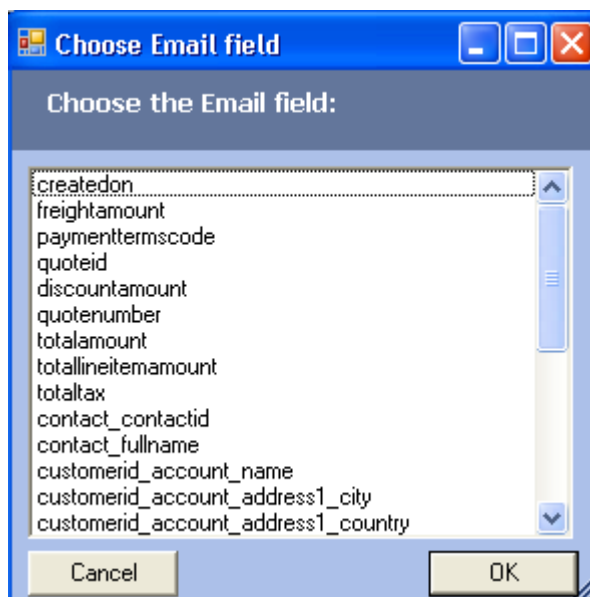


Click No to create an Email.

Step 2: Then choose the CRM Activity



Step 3: The next dialog is the following : "Choose Email Field". This Field should be shown on the list if you have already inserted the Email field in your document!



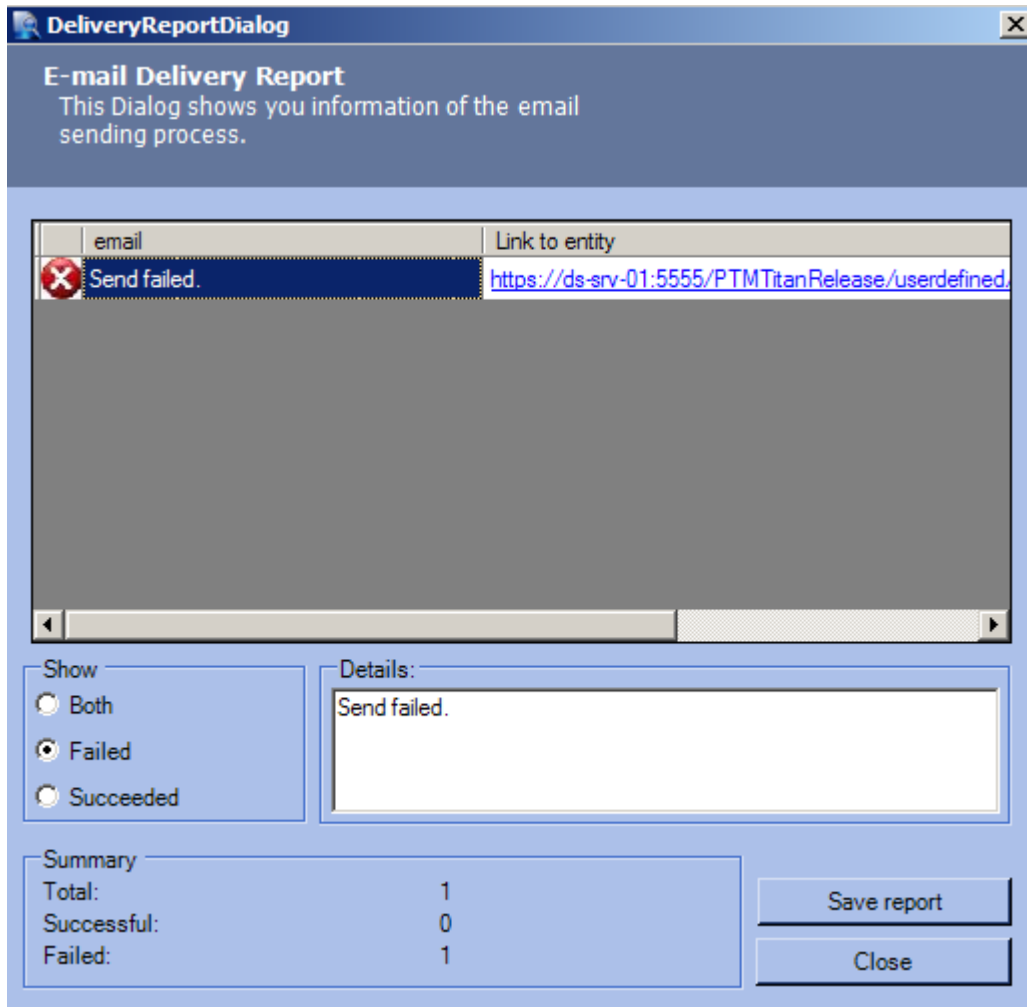
Should the Email field not appear in this box you can insert it as shown in part 9 document properties.:

6.1 E-mail property

See: 12 Document Properties, Tabpage 2, Email

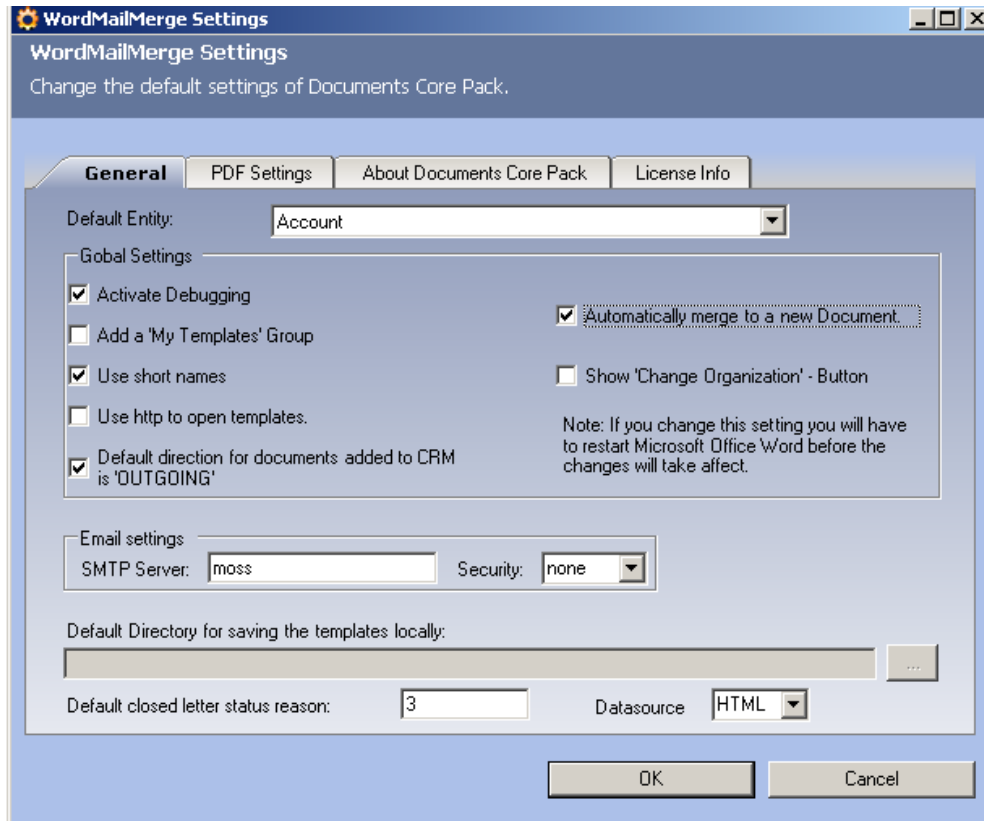
7 E-mail Delivery Report

After sending an email you will see a list of failed sent processes. The reason why a send process failed is when the email field in CRM is empty. For such a record no activity will be generated. If you click on the link in the List the entity were problems occurred will be opened. If the send process was not successful no Activity will be created. You are also able to save the current view to an XML-file.



8 Documents Core Pack Settings Tabs

The following steps will describe the settings tabs :

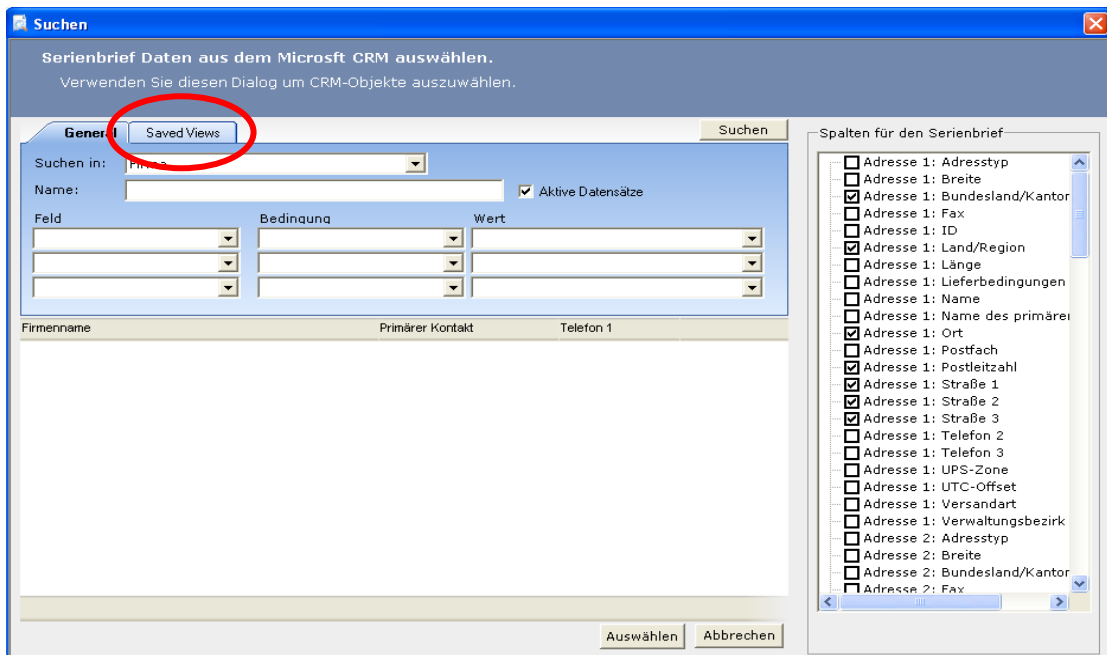


- The General Tab**
 This tab shows the general settings for Documents Core Pack: Activate Debugging is not always necessary, only when an error occurs. Add a "My Templates" generates a newTab in the open templates menu and all your personal templates can be saved here.
- PDF Settings**
 On this tab you can choose the directory in which your PDF file will be saved and also if it will be deleted after being attached to an email.
- About Documents Core Pack**
 This is an information tab showing the version , business unit and the number of active users.

9 Using "Saved Views" to select records

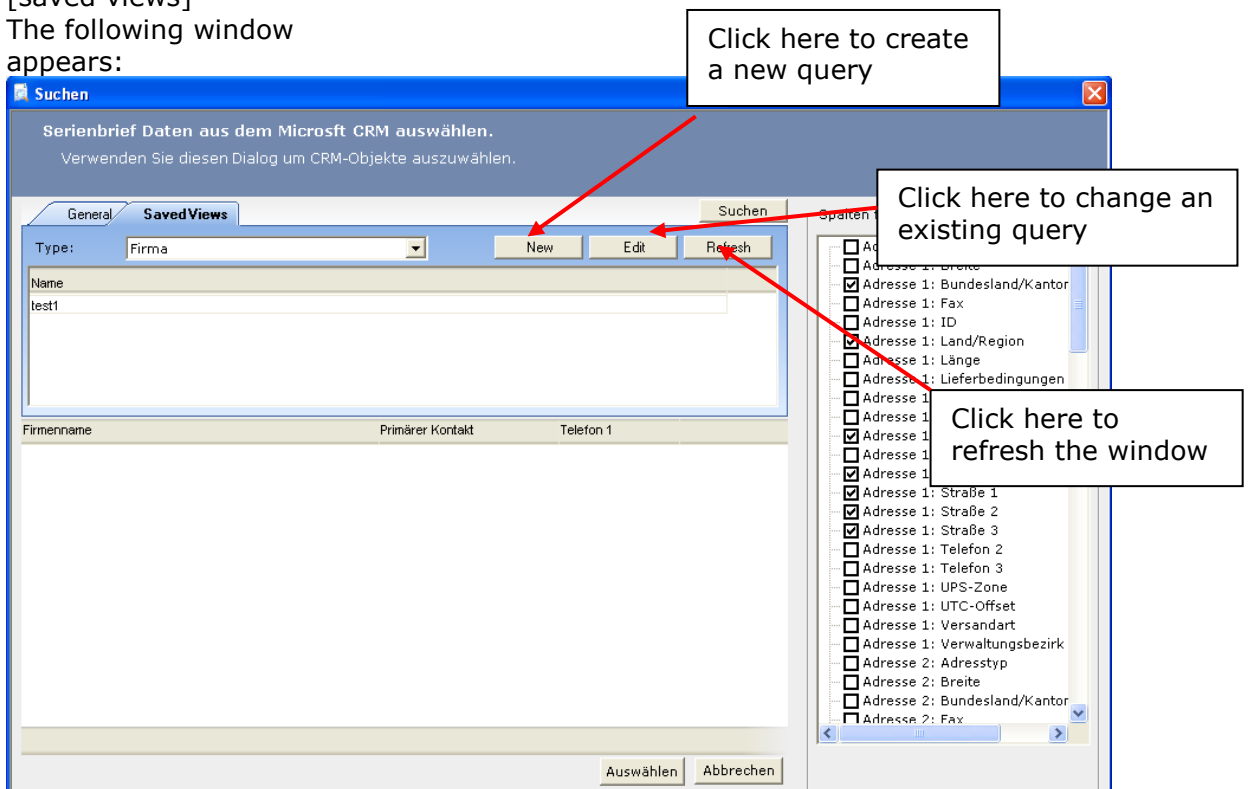
Step 1: Click on [Choose CRM Data]

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



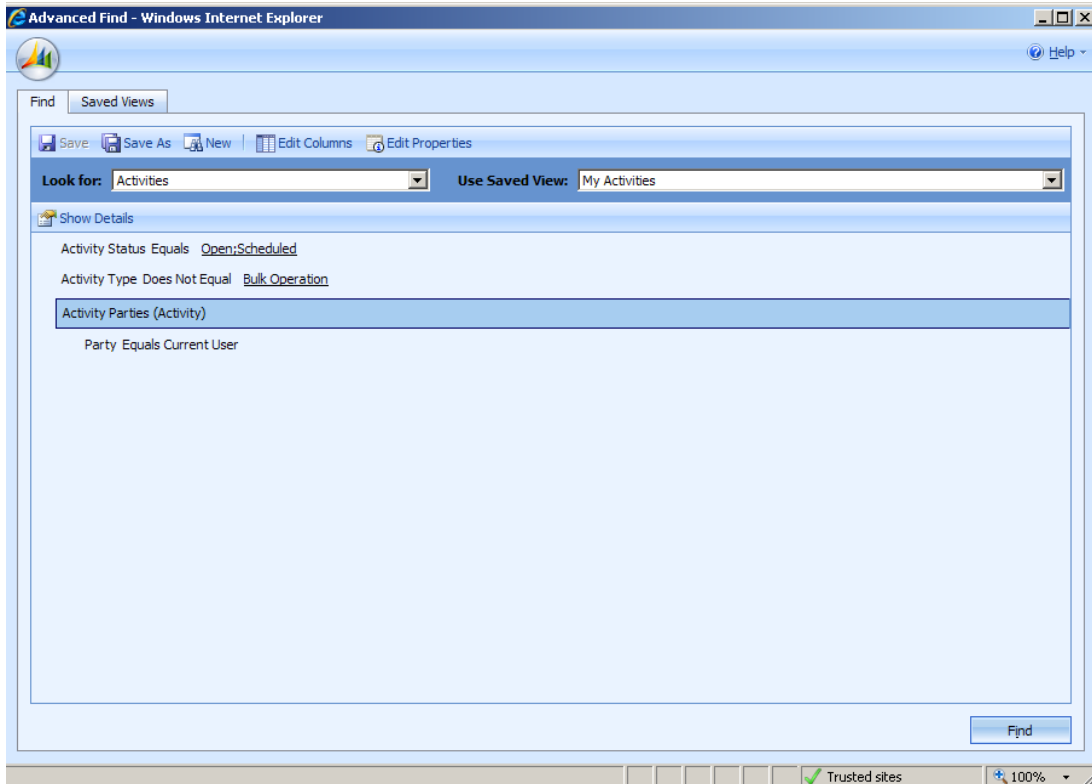
To choose the records by using saved views, we have to change to the register [saved views]

The following window appears:

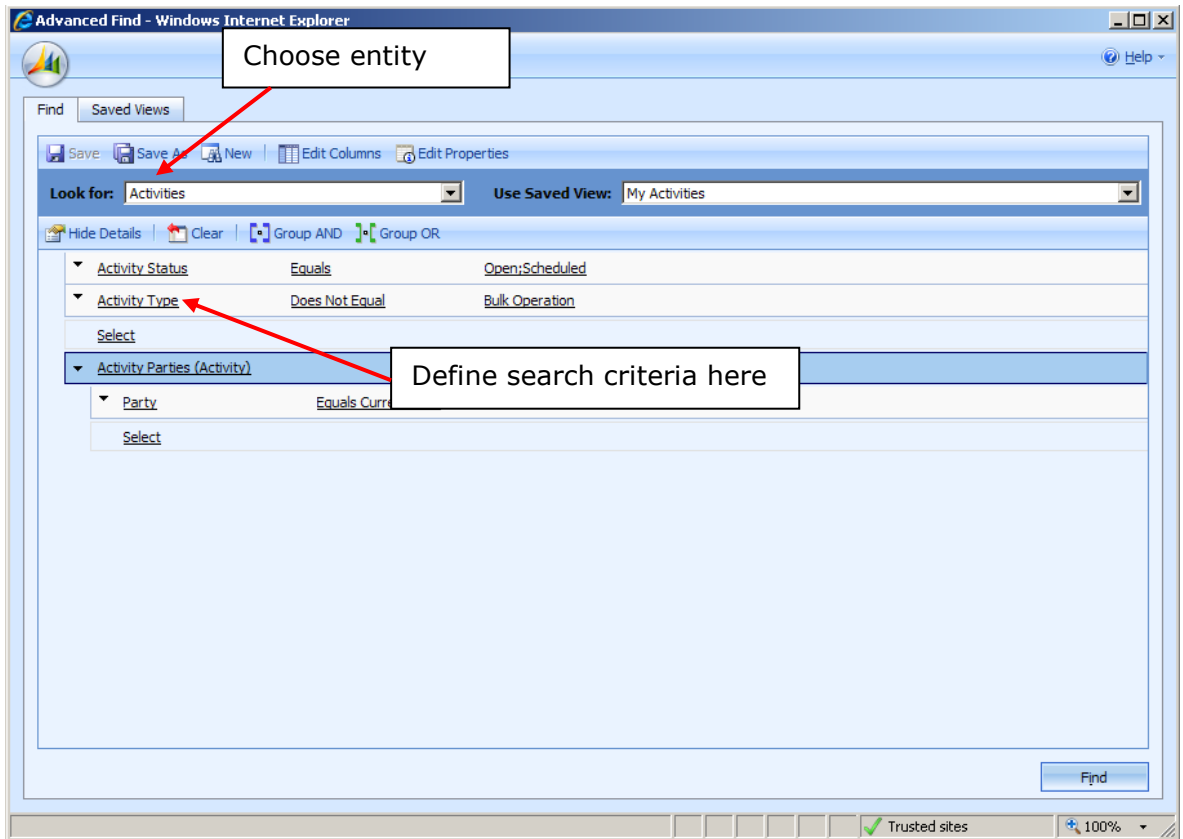


Step 2: Create a new query.

By clicking on the button [New] a new window [Advanced Find] will be opened automatically. In this window we have got the possibility to define queries for our "Saved View".

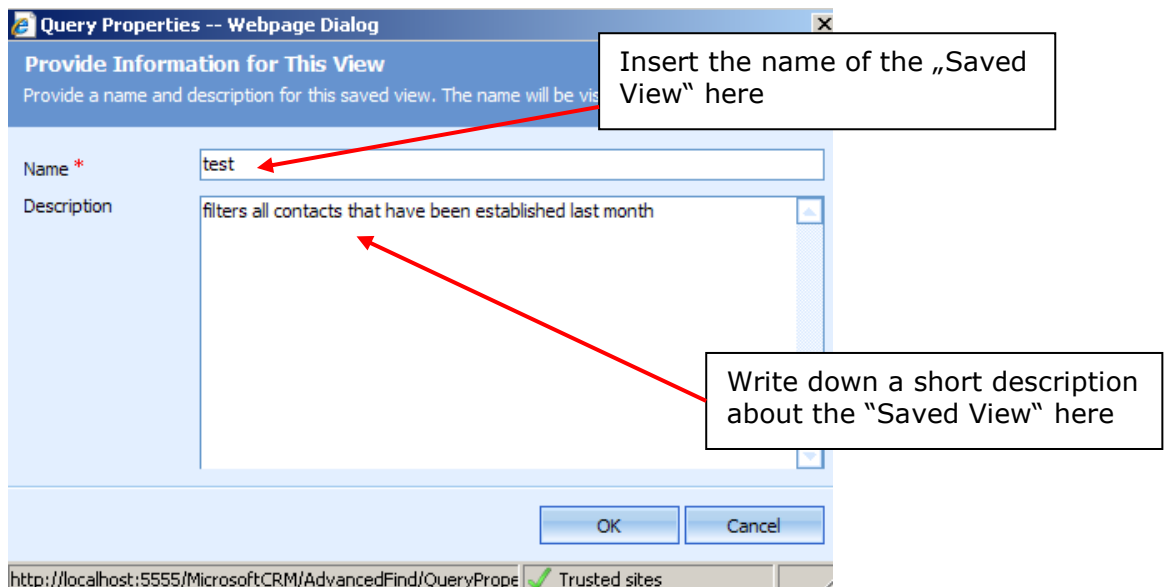


In our example we want to define a "Saved View" which delivers all contacts that have been established in the last month. After selecting the entity "Contacts", we can define our search criteria in the field below.



Now we can change our query as a "Saved View" by clicking on the [Save] or on the [Save as] -button.

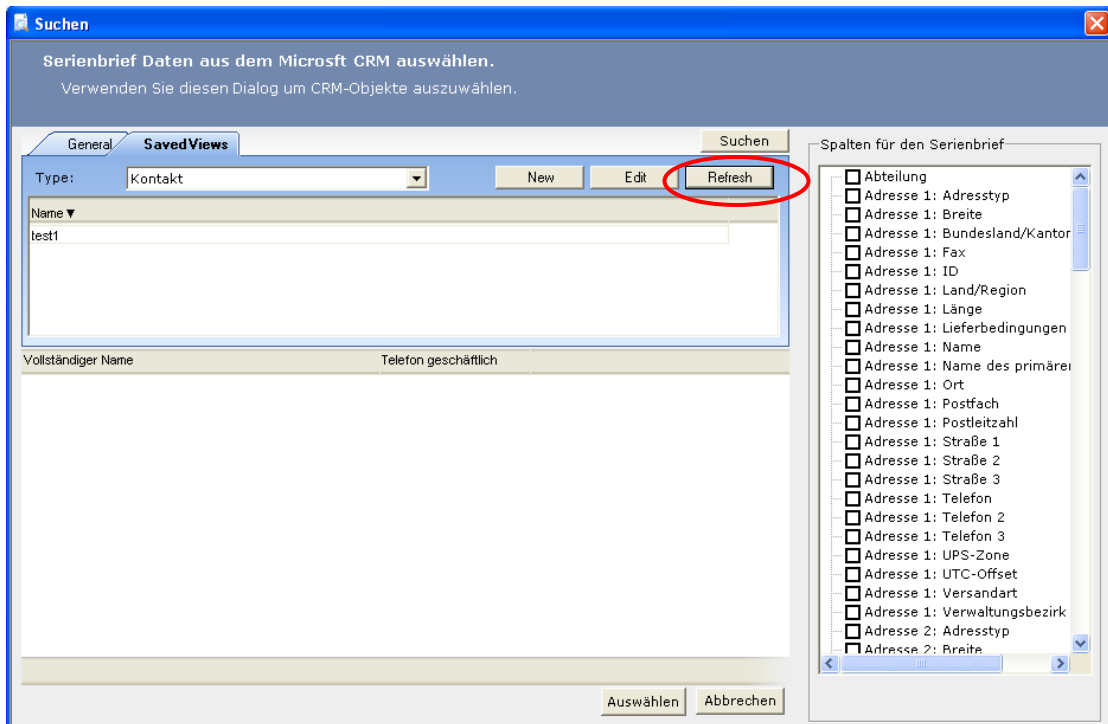
The following window appears:



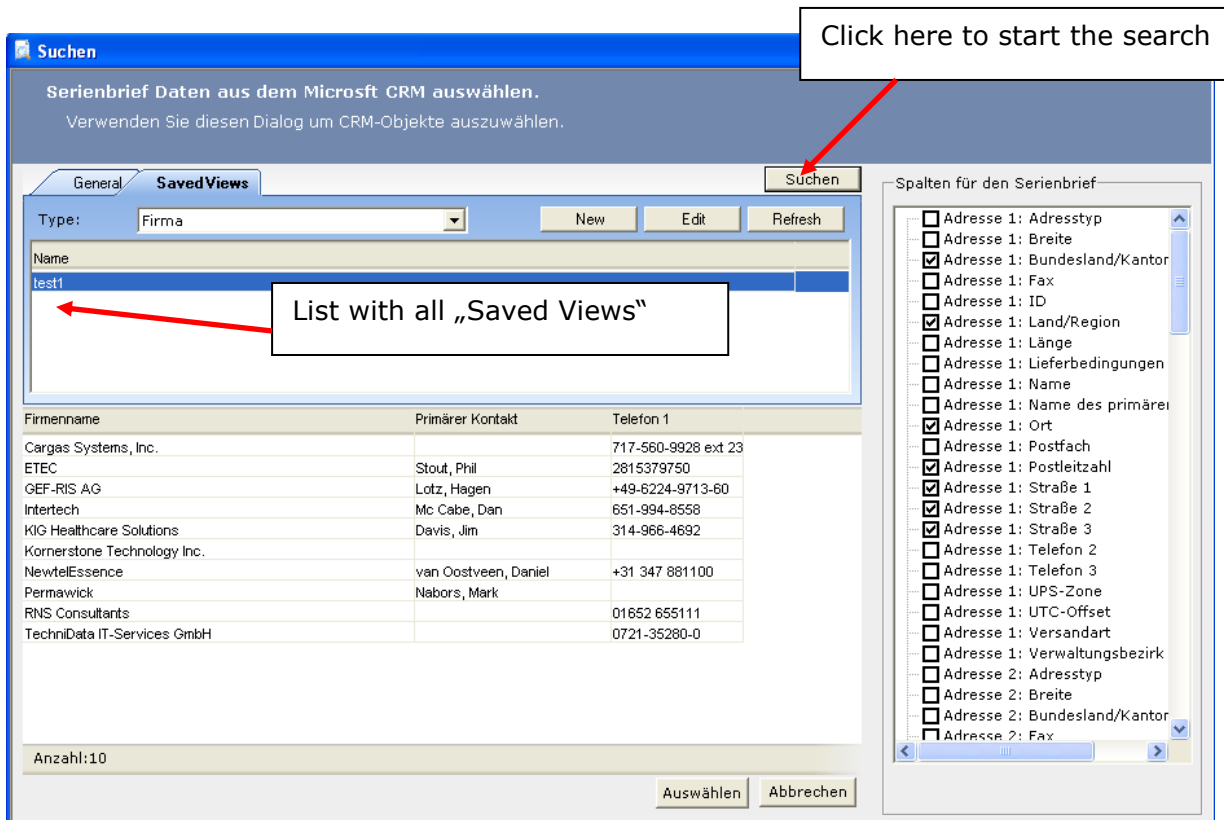
Here we can title our query and write a short description about our "Saved View". With a click on the button [OK] the query is saved. Now we can close the window.

Step 3: Using "Saved View"

Back in the "Search Window" we have to push the button [refresh] to update the list of the "Saved Views".



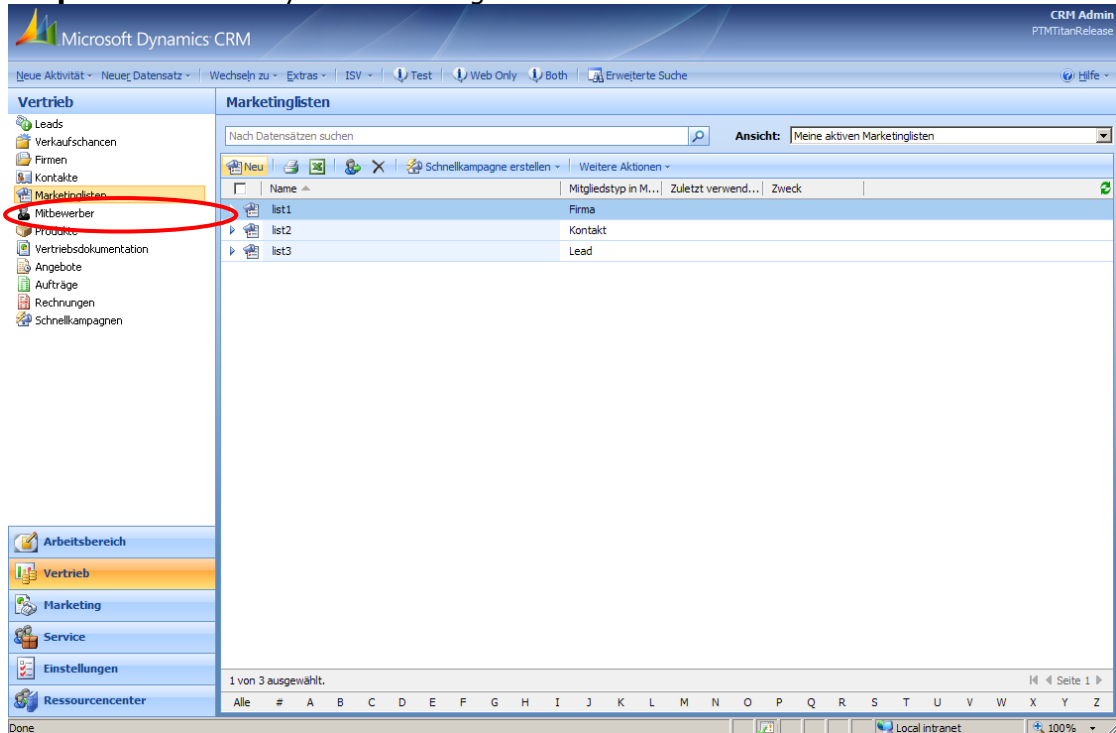
Now we can choose our "Saved View" and search for records which fulfil by a click on the [Search] - Button.



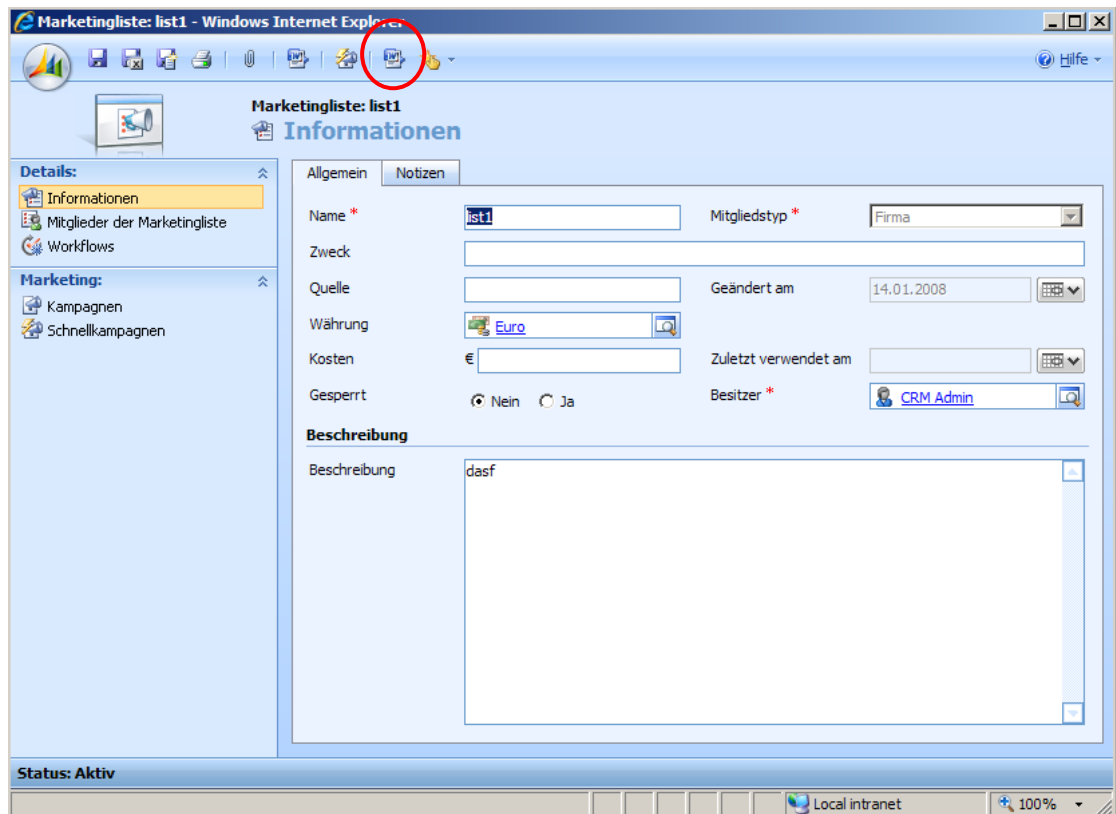
Now we have to select the records for our mail merge and with a click on the button [Choose] we get back to our document. Now all the selected records will be used in the mail merge in MS Word.

10 Creating Letters using the Marketing lists

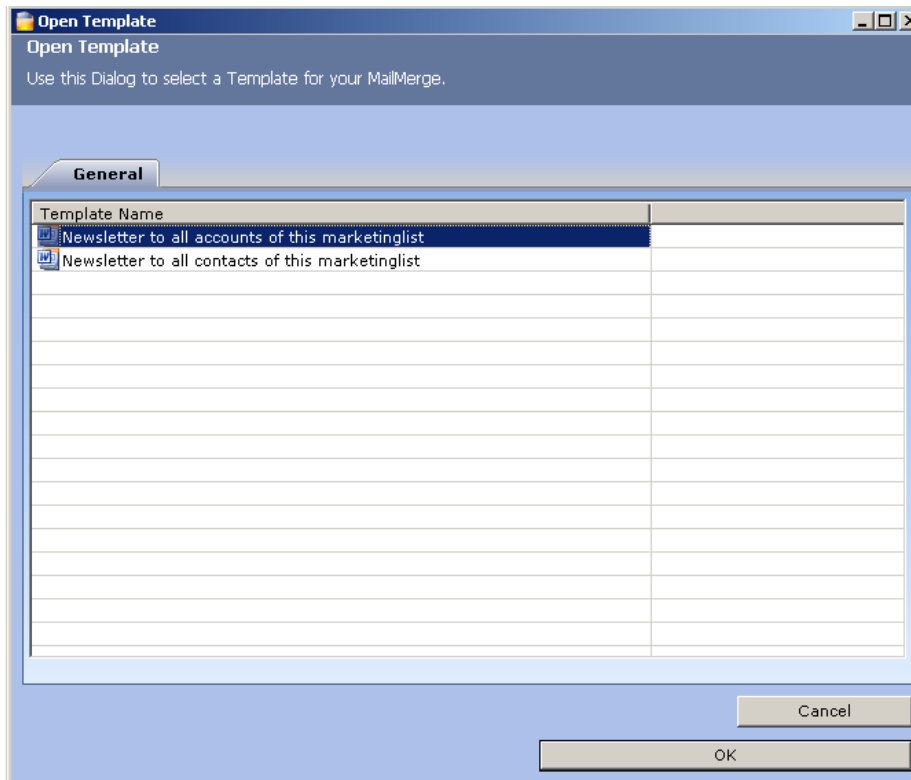
Step 1 First choose your Marketing list:



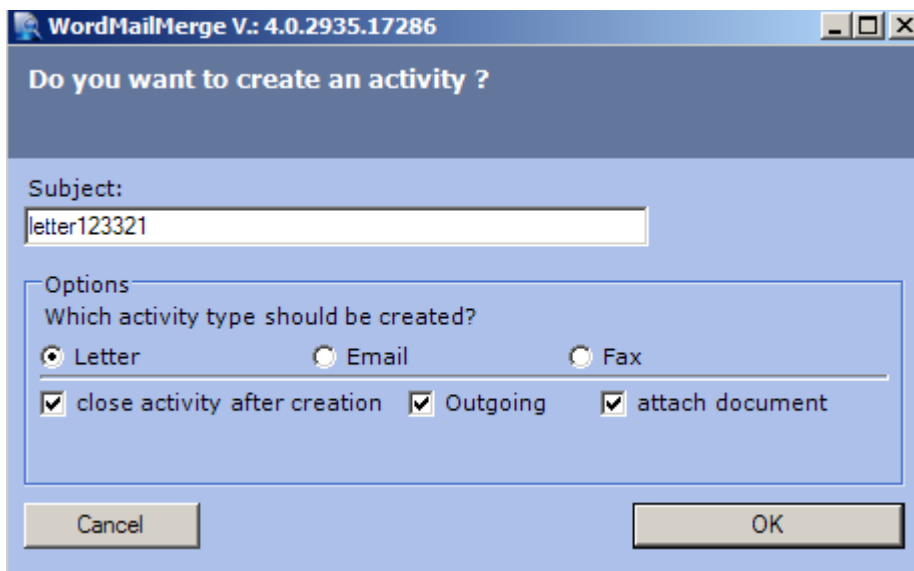
Step 2 Once the Marketing list members have been defined simply press the "print in word" button.



Step 3 Select the desired Template and your Newsletter will be created!



Step 4 All you need to do now is create a CRM Activity!
As shown in [part 4.2 step 8](#)

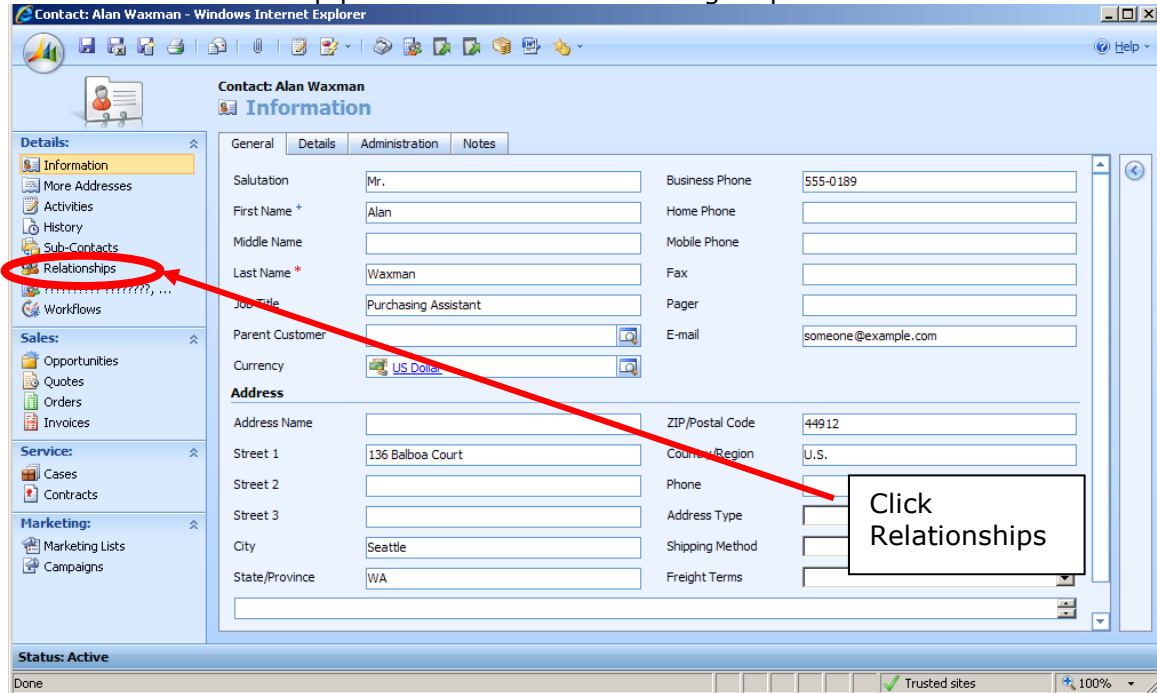


11 Relationships between Accounts and contacts

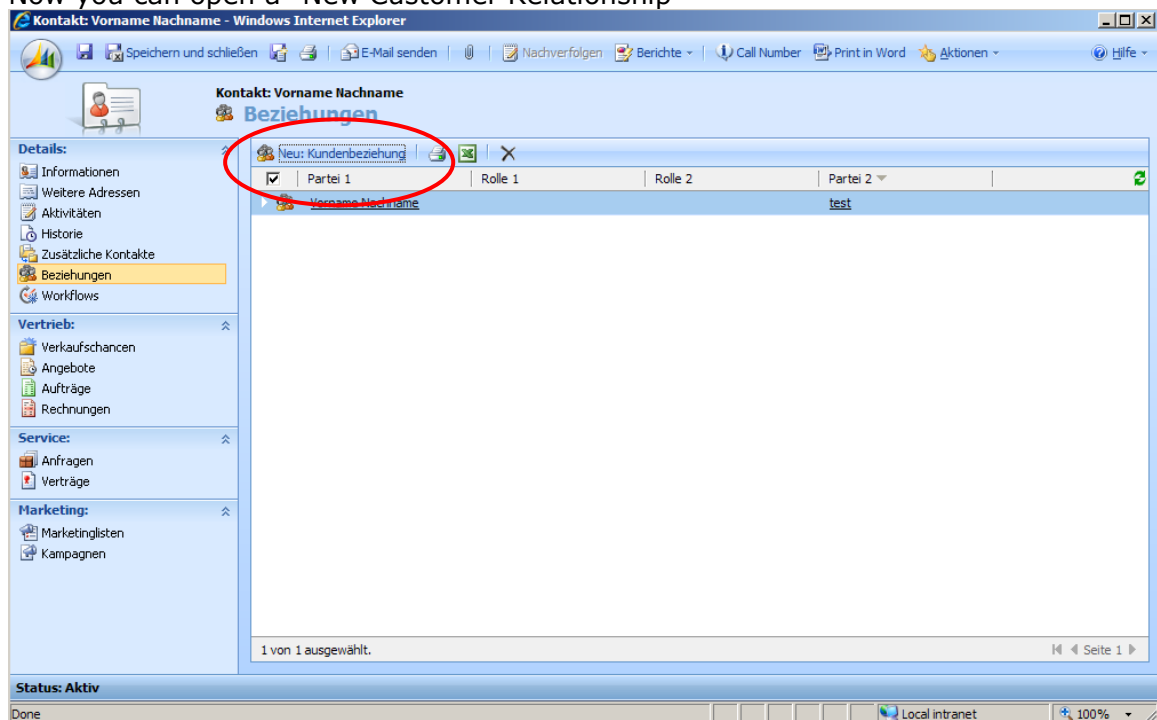
Relationships are defined between two parties! These can be as follow :

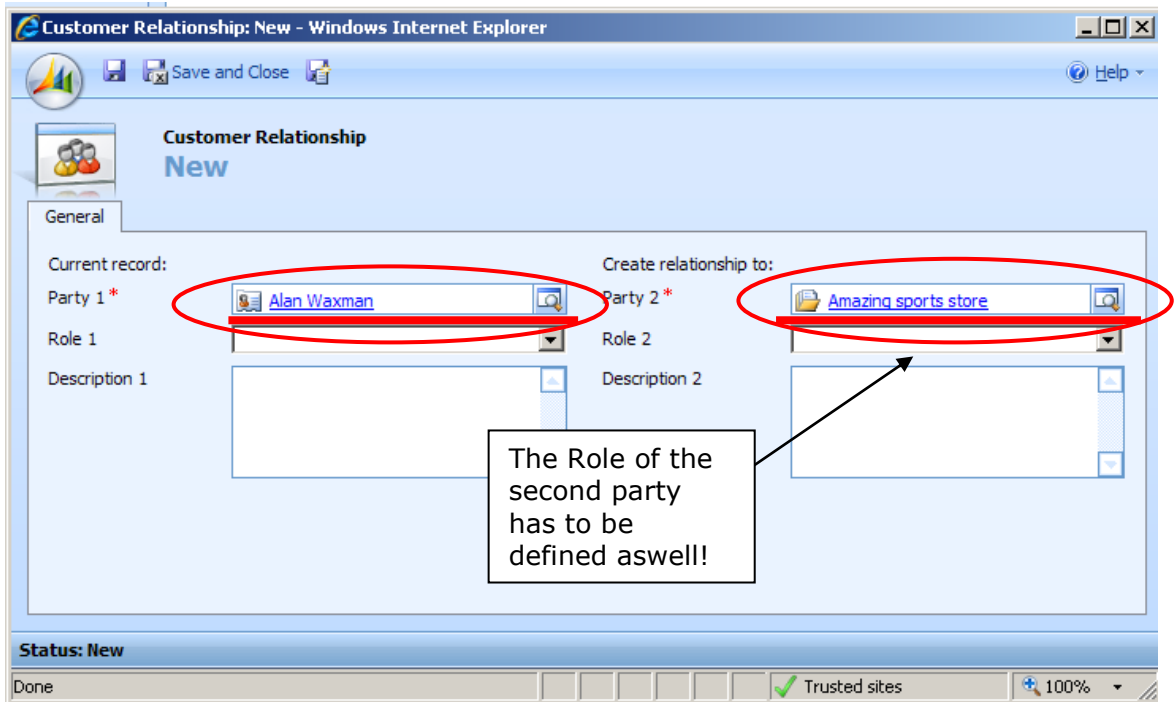
- Account to Account
- Account to Contact
- Contact to Account
- Contact to Contact

To define a Relationship please execute the following steps :

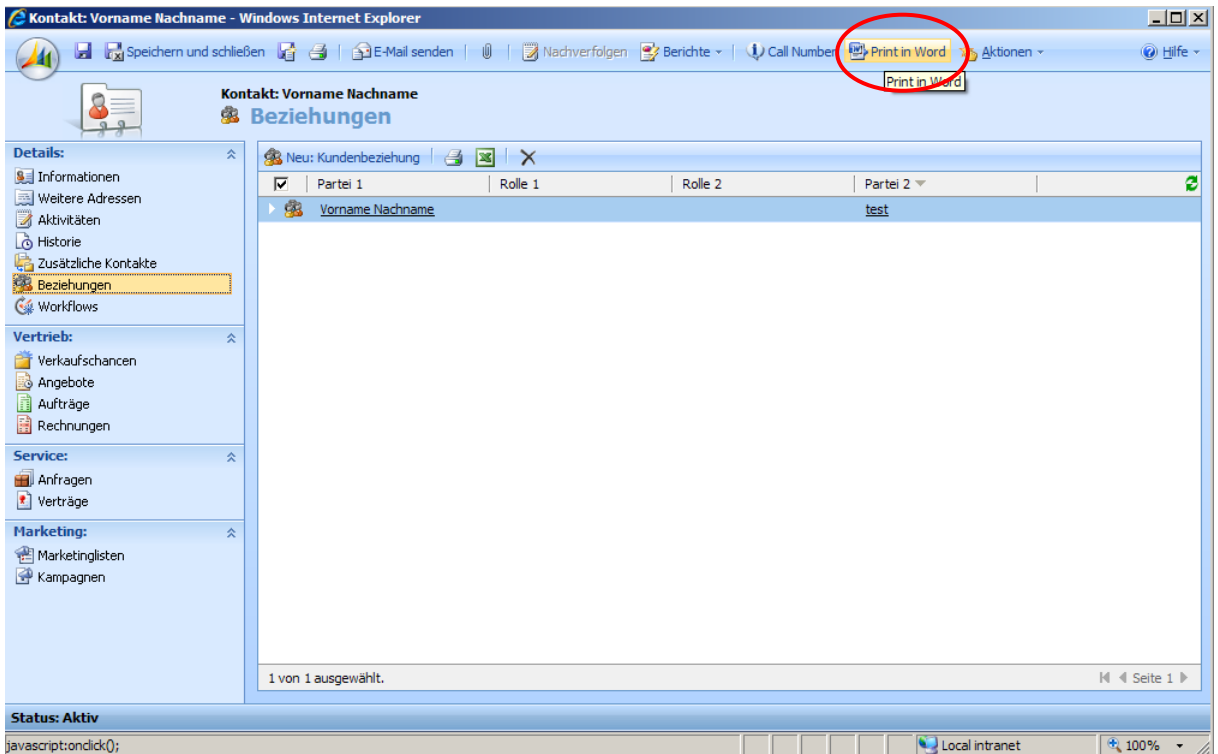


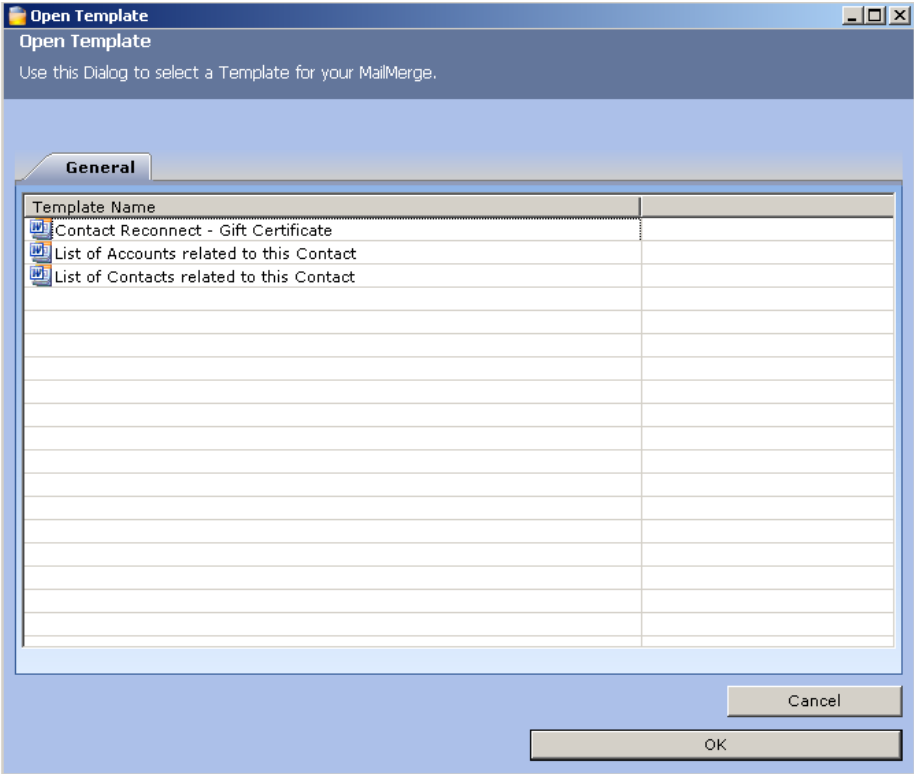
Now you can open a "New Customer Relationship"



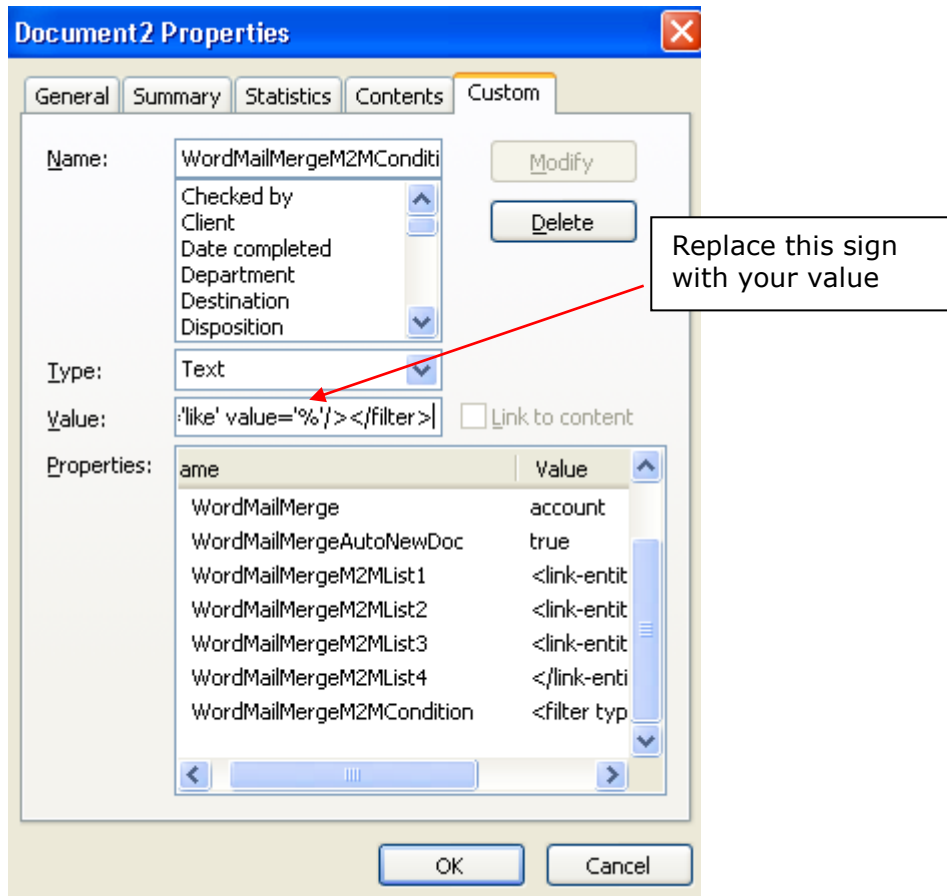


After defining and saving the relationship click the print in word button and choose your template!





Should you only want to show specific relationships go to:
File > properties>custom>Documents Core PackM2MCondition/Filter type and
replace the percent sign with your value.



12 Document Properties

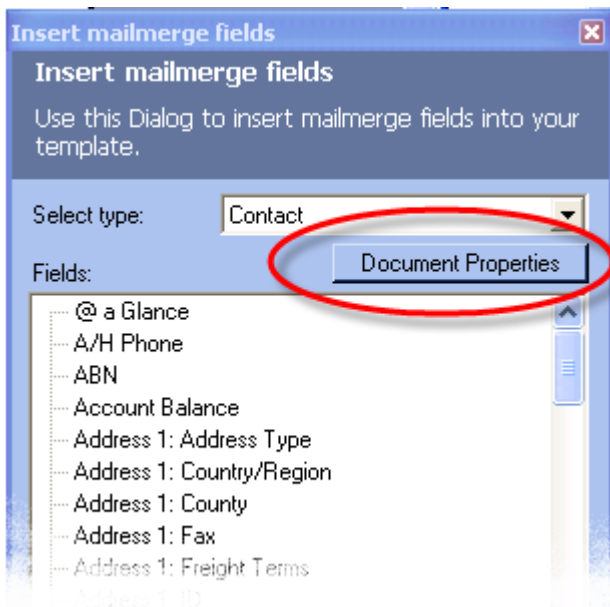
12.1 Overview

What are the Document Properties?

To give DCP templates more flexibility you can use Document Properties. They are configurable since version 2.18 via an extra window in the "InsertMailMerge fields" dialogue.

How to start?

Open your Template and select Documents Core Pack for MS CRM / Insert MailMergefields. Press on the Button "Document Properties".



Following window appears:

Tappage 1 - Extra Entity (1:M Relationships)

Here you can create 1:M Relationships. (Its possible to create M:M relationships too)

Basically this tab is seperated into 4 areas:

Document Properties

Use this Dialog to add/change ExtraEntites (1:M and M:M relationships) and the document properties.

Extra Entity | Document Properties

Select ExtraEntity:

Relationships:

ExtraEntity

Mainentity:

Displayname of Subentity:

Subentity:

surpress Mainentity:

EntitiesExtraCurve

Subentity:

Foreign Key to Mainentity:

Mainentity:

Alias (optional):

ExtraEntity

WMM Properties

ExtraEntity:

EntitiesExtraCurve:

M2MList:

M2MCondition:

If you added a new ExtraEntity please dont't forget to press [Apply] before you press [Apply in Document]!

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

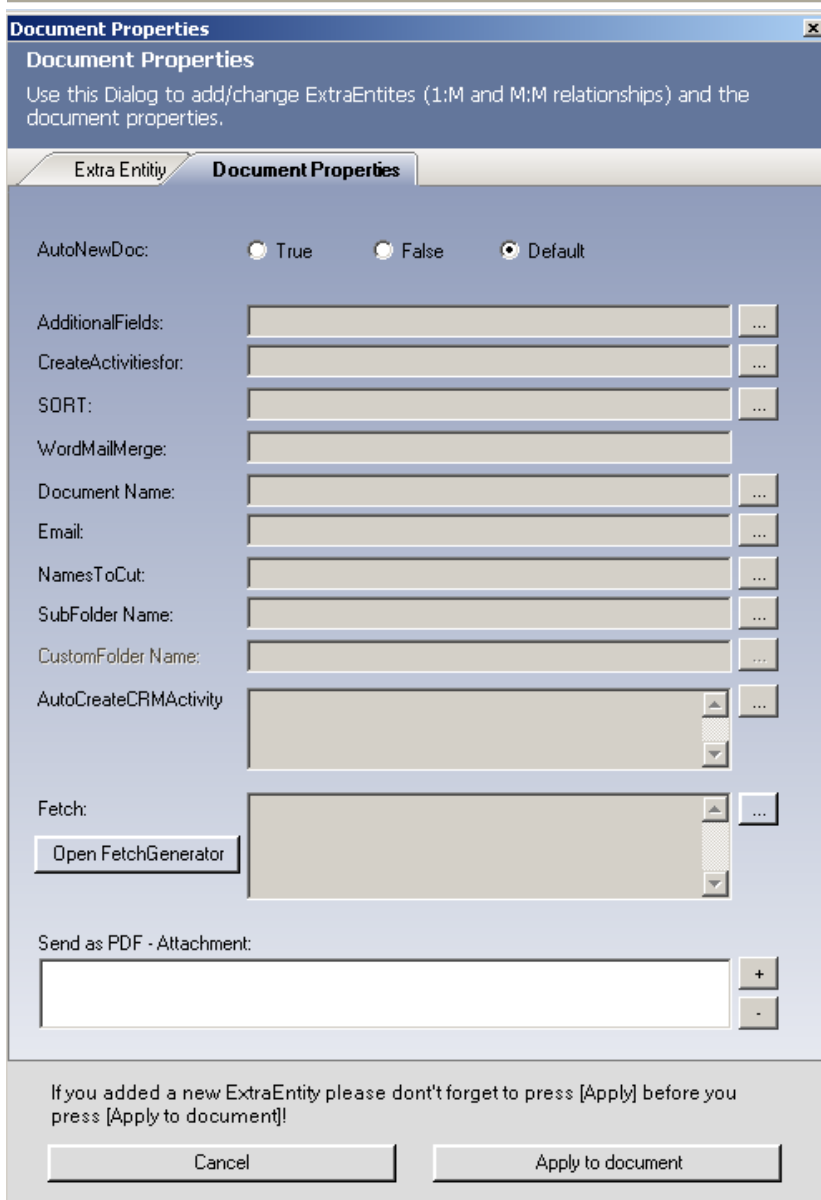
* ExtraEntity: This DCP-Prop is used to show the additional Entity in the Tree

* 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

Tappage 2 - Document Properties



On this page there are some additional Properties which help you to give DCP more power.

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

*** 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)

*** 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.

*** 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 for e.g.: contact,contact_contactid

-> In this case the activity will be saved to the contact.

*** SORT:**

tells DCP how to sort. You can set this in [Choose CRM-Data] with the [Sort] Button.

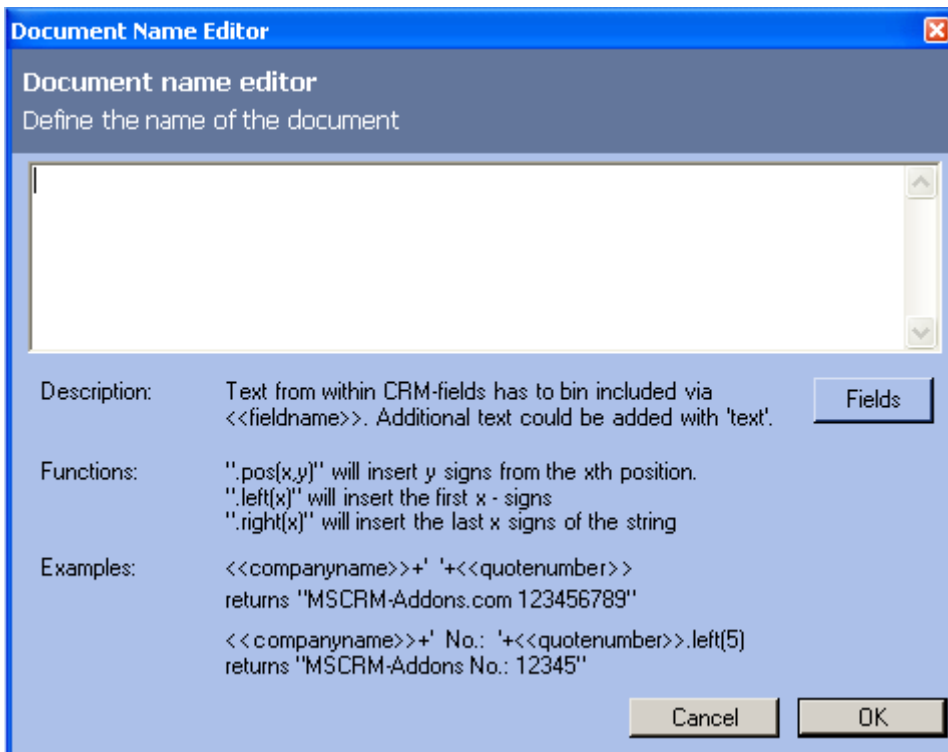
Syntax: fieldname collation. (e.g name A -> sorted ascending by name , D for descending)

*** Documents Core Pack:**

here you can see the entity, the template has been created for.

*** DocumentName:**

here it's possible to define the name of the document. It's possible to use data from Fields out of CRM to be part of the document name.

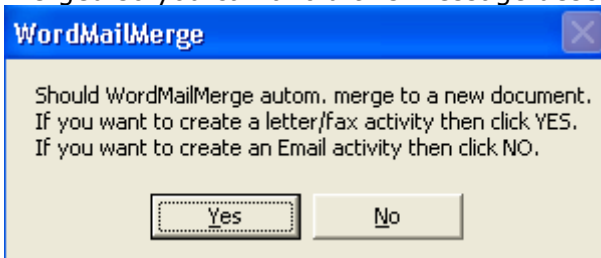


Functions:

- ".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

*** Email:**

if you choose a email address in this field it is possible to send a email which is already merged so you can avoid this message described in point 6 - Step 1.



And you also do not need to disable "Automatically merge to new document" under the "Documents Core Pack Settings".

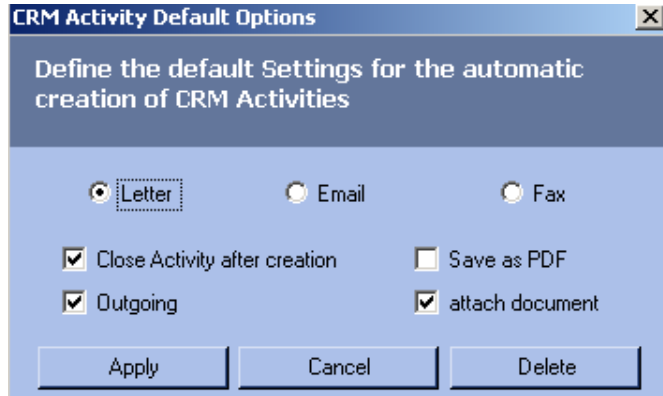
*** NamesToCut:**

Please see Implementation Guide (chapter 1.5.3 and 1.5.4)

*** SubFolder Name**

With this option it's possible to define folders to which the merged document will be saved to in the FileShare or onto the sharepoint.

*** AutoCreateCrmActivity:** Since DCP-Client version 4.32 it is possible to define options for the automatic creation of CRM-Activities.



Configurable settings:

- Activity type: Letter, Email or Fax activity
- Close activity after creation: if checked the activity will be closed and therefore appear in the history-section of the regarding CRM record
- Outgoing: specifies the direction
- Save as PDF: the attached document can be saved as standard MS Word - .doc or .pdf
- Attach document: specifies whether the document should be attached to the activity. If unchecked, the content of the document will appear in the activities-description only.

All settings defined in this section will take effect when clicking the "Create CRM-activity" option. Therefore most settings can be pre-configured for users who work with this template.

ADDITION: Furtheron it is possible to completely automate activity creation via macros. Therefore a macro has to be added as described in:

<http://support.mscrm-addons.com/default.aspx?KB=10762>

Within the function "DocumentsCorePackMacro()" you will have to place the following line:

```
CommandBars("www.mscrm-addons.com Toolbar").Controls(3).Execute
```

If well configured, users just have to press the "Print in Word" button on the regarding CRM-record. DCP will merge the document, create an activity and close Word if needed without any necessary user-interaction.

For detailed information see chapter 12.2

***FetchXML:**

See "FetchGenerator UserGuide" – available on

<http://www.mscrm-addons.com/default.aspx?tabid=116>

12.2 How to configure Sharepoint / Fileshare – paths

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

1) Documents Core Pack Server Configuration (Server)

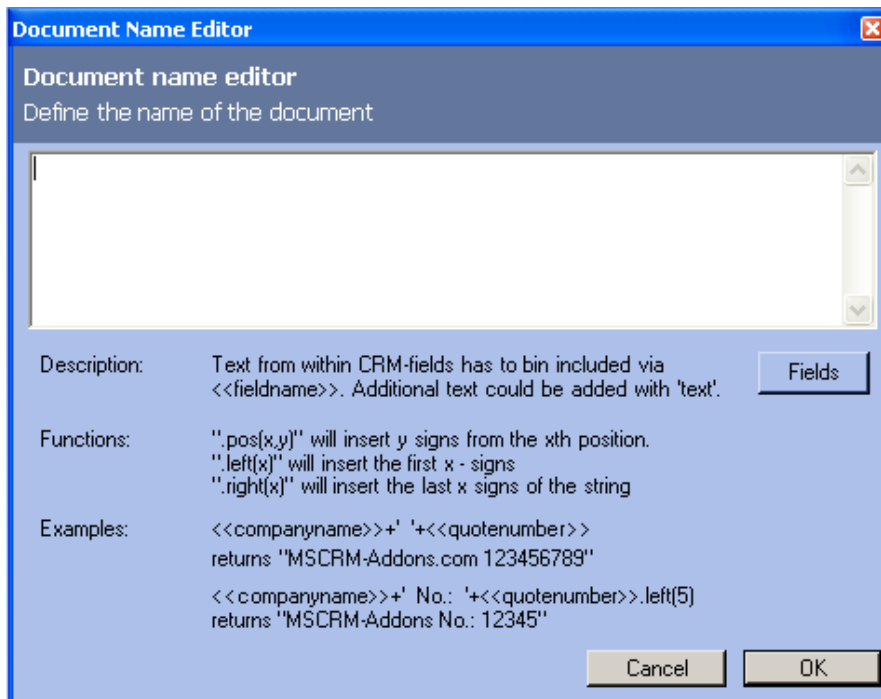
Here it's possible to define root-paths for all entities. (e.g Contact,Account)
So all documents created for the entity e.g Contact will be saved to the Contact-root unless no subfolder is defined on the client side.

(See Implementation Guide, chapter 1.3.3 / 1.3.4)

2) Document Properties (Client)

In the document properties of the template (see chapter 12), you can find a setting called "**SubFolder Name**" which allows you to specify a subfolder for the created document.

With a click on [...], 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:

Competitor	Folder	X	(default)
Contact	Folder	X	\\Dev-crm3\WordMailMergeDocuments\Contacts
Contract	Folder	X	(default)

• Client-Settings:

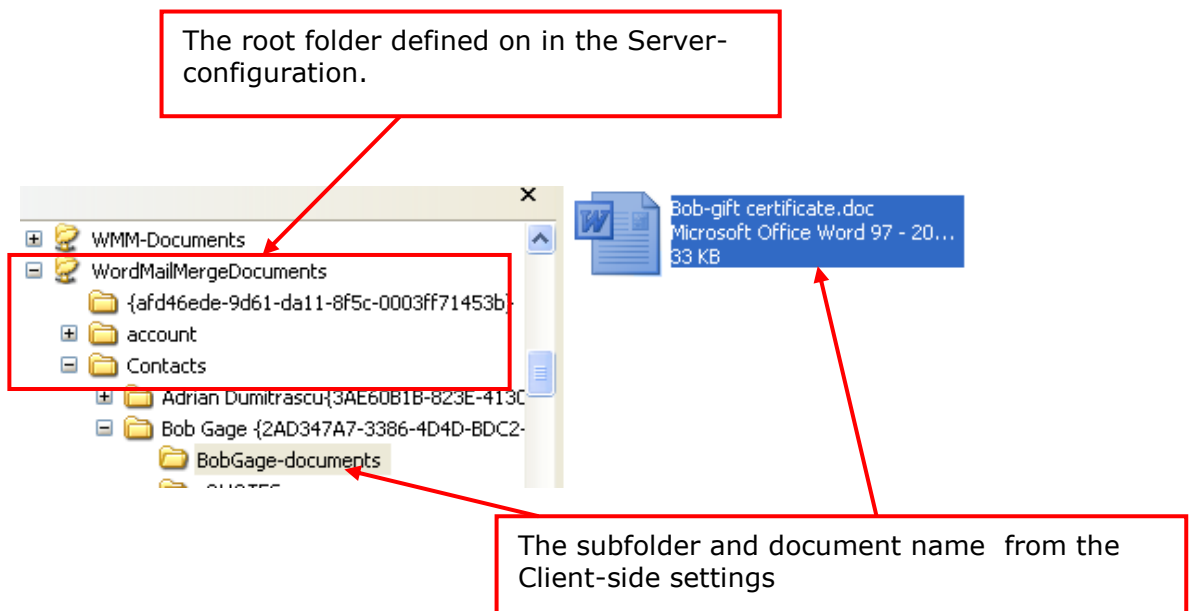
In the Document-Properties, we can define a subfolder-name and a document name for the created Gift-certificate.

Document Name: <<firstname>>+'-Gift Certificate'

SubFolder Name: <<fullname>>+'-documents'

• 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.

Competitor	Folder	X	(default)
Contact	Folder	X	\\Dev-crm3\WordMailMergeDocuments\Contacts
Contract	Folder	X	(default)

- 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.

Therefore the client side settings have to look like this:

CreateActivitiesfor: ...

Document Name: ...

SubFolder Name: ...

- Result:

The root folder defined on in the Server-configuration.

The subfolder and document name from the Client-side settings

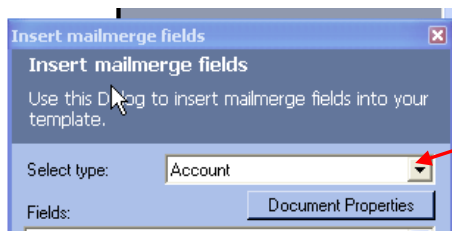
**NOTICE: This operations are equal on the Sharepoint!
(see Implementation GUIDE 1.5.4)**

12.3 Step by Step description (build 1:n relationships)

With the option to define 1->n and m->n relationships its possible to link entities together and load data from both into the MS Word document. (see chapter 11.1)

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

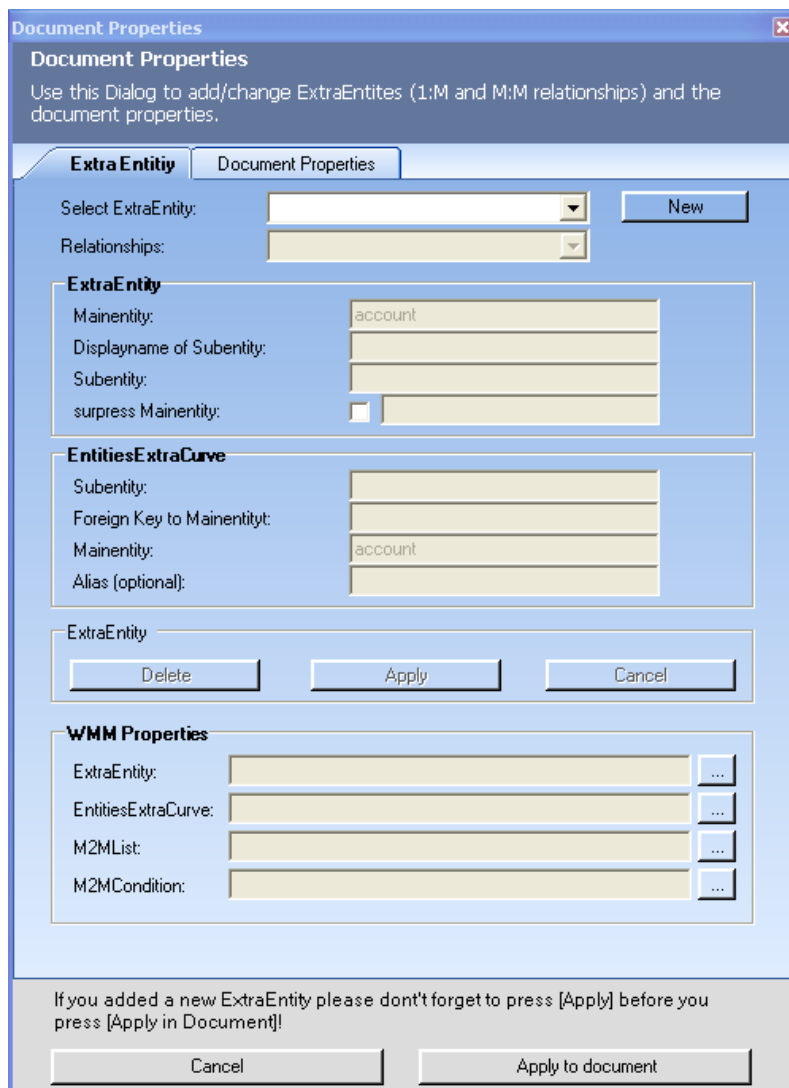
Step 1; First you have to click on "Documents Core Pack for MS CRM"->"InsertMailMerge fields" and choose the entity you want to define a relationship for.



Choose the entity you want to define the relationship for.

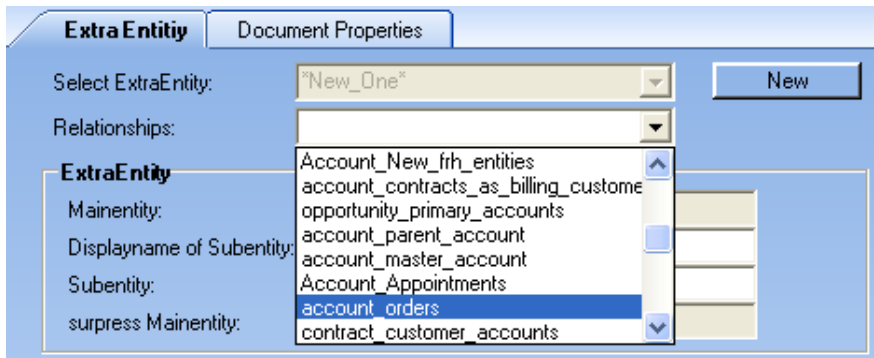
Click on "Document poroperties"

Step 2; Following window appears: (for explanation see chapter 11.1)

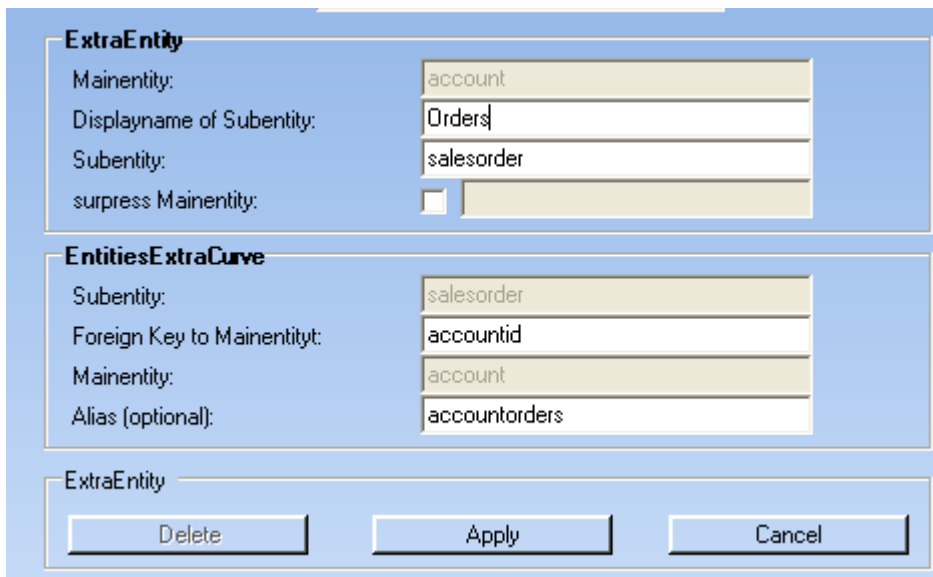


Its possible to select ExtraEntities (relationships) that already have beend defined with the combobox. To add a new relationship we have to click on "New".

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.

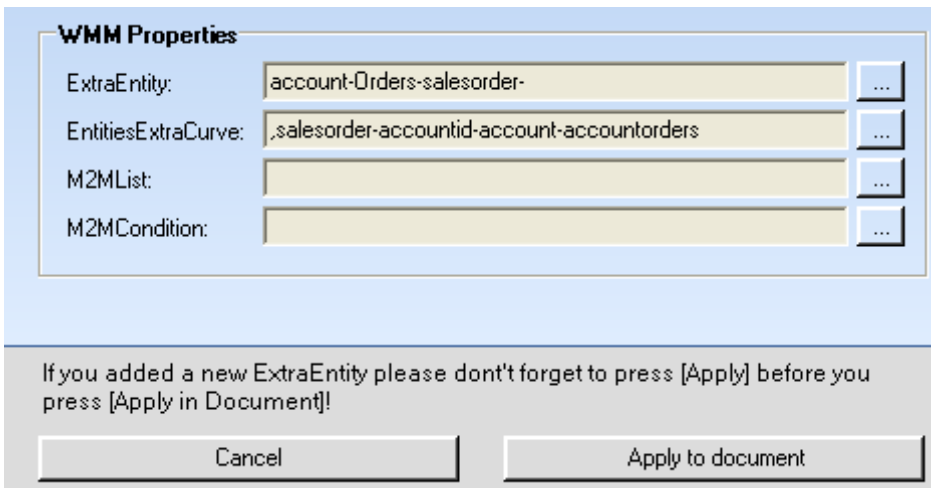


Step 3; After that some important fields for Extra Entity and EntitiesExtraCurve are filled automatically:



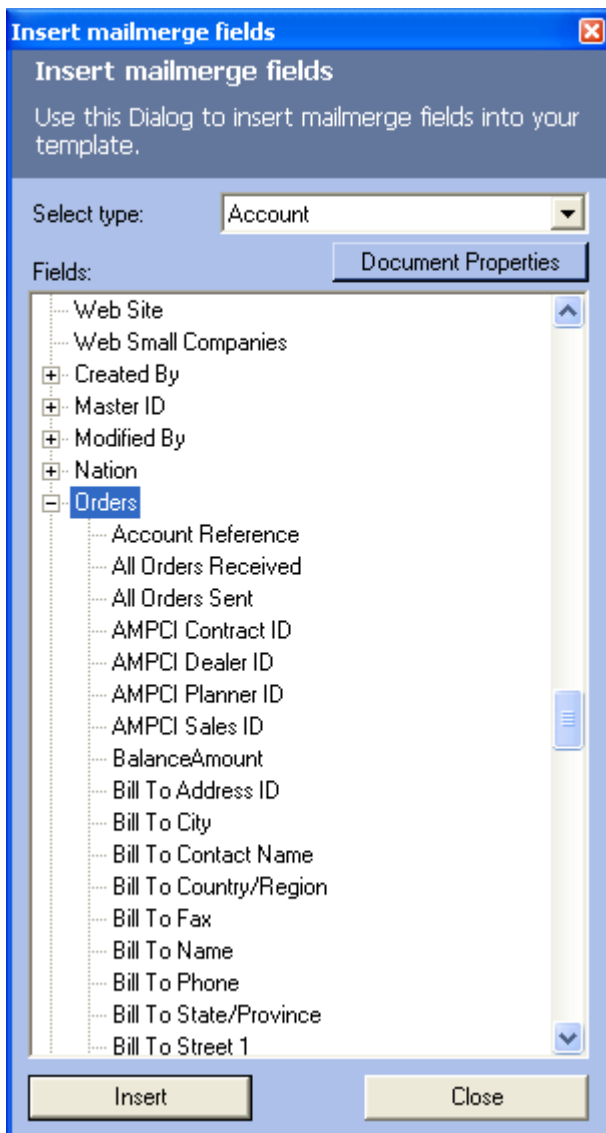
now we have to define the displayname of our extra-entity and if necessary supress the mainentity. If everything is OK, we can go on with a click on "Apply".

Step 4; The DCP properties you can see and check the data again.



If everything is OK we can finish with a click on "Apply to document"

Step 5; Now we can see a new entity "Orders" in the list of the available fields for entity account and therefore use it to load data of the orders into the template.:

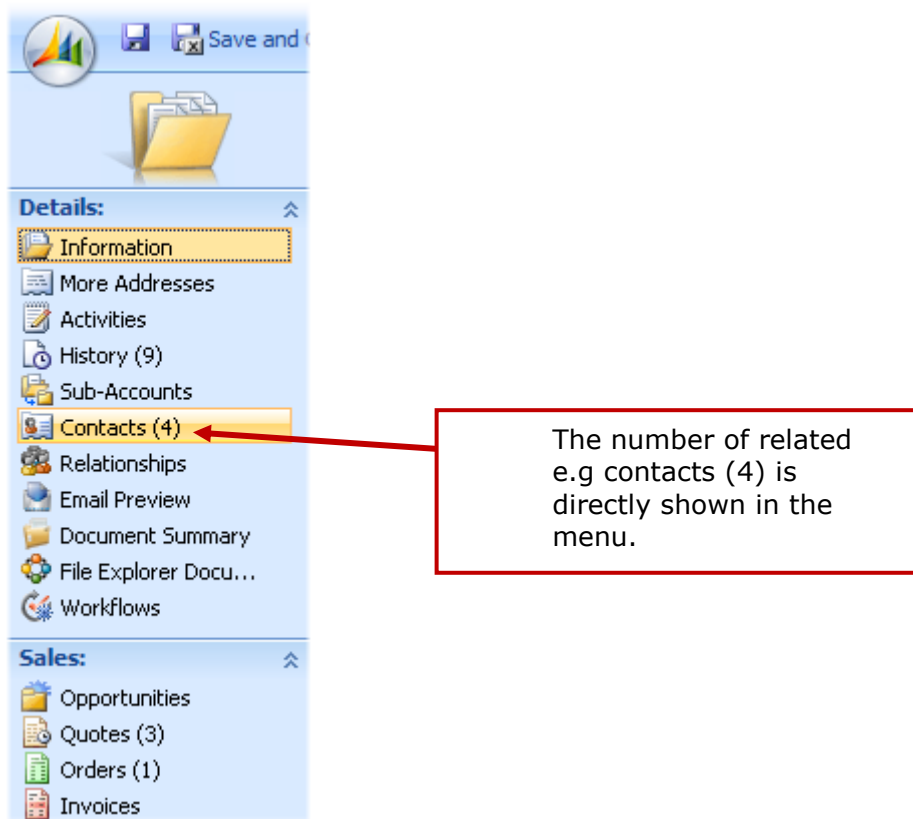


Documents summary & LinItemCount

Documentation on how to activate and configure both of the following points can be found in our implementation guide for Documents Core Pack 4.0 (server).

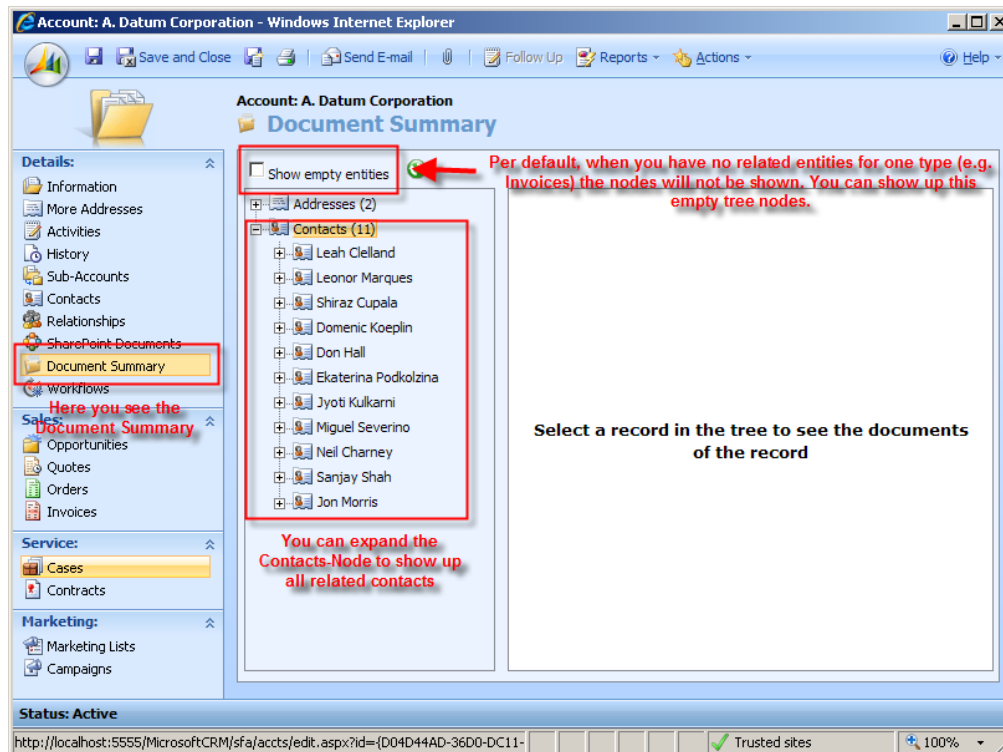
12.4 LinItemCount

With LineItemCount enabled (configuration see Implementation Guide chapter 1.3.5), the number of related records is shown within the side-menu in CRM.

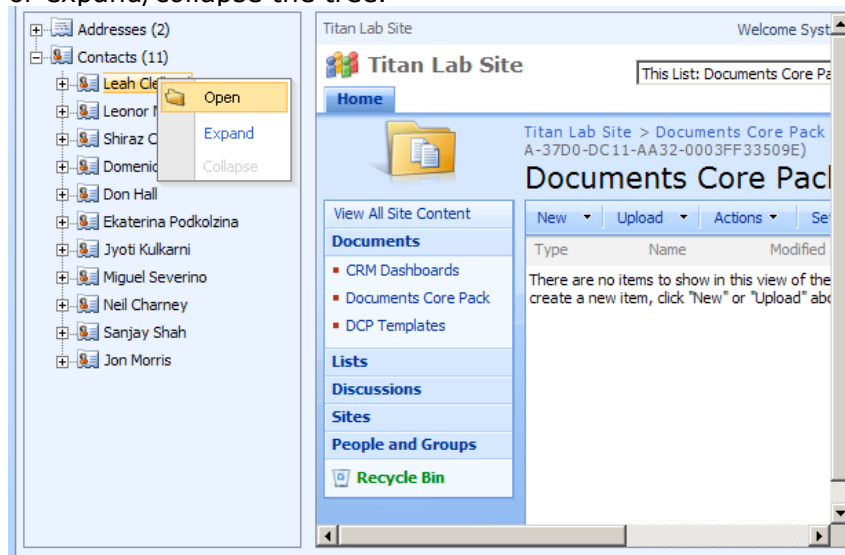


12.5 Document summary

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 till you don't have any related entities. 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

13 Contact

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