



**mscrm-addons.com**  
DocumentsCorePack for MS CRM 2013

# DocumentsCorePack Server and Client for MS CRM 2013

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Server Version 2013.13 / Client Version 6.16  
March 2014

## **Server and Client Installation Guide**

(How to install and configure DocumentsCorePack Server and Client for MS CRM 2013)

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# Table of Contents

- 1 COMMON INFORMATION ..... 5
- 1.1 Intended Audience ..... 5
- 2 LICENSE..... 5
- 3 PREREQUISITES ..... 5
- 3.1 Microsoft .NET Framework 4.0 RTM is required ..... 5
- 3.2 Supported CRM Versions..... 5
- 3.3 Windows Identity Foundation..... 6
- 3.4 Supported Operating Systems..... 6
- 4 INSTALLATION SERVER COMPONENT ..... 6
- 4.1 AutoMerge Online Service Configuration ..... 7
- 4.2 Introduction..... 7
  - 4.2.1 EULA (End User License Agreement)..... 8
  - 4.2.2 Folder Selection ..... 8
  - 4.2.3 Confirm Installation..... 9
  - 4.2.4 Install Windows Identity Foundation ..... 10
  - 4.2.5 Configure CRM Server..... 10
  - 4.2.6 Security Roles ..... 13
  - 4.2.7 Finish Installation ..... 14
- 5 OBSOLETE PRODUCTS OVERVIEW ..... 15
- 6 DOCUMENTSCOREPACK SERVER CONFIGURATION ..... 17
- 6.1 "General"-tab ..... 20
- 6.2 „About AutoMerge“-tab ..... 21
- 6.3 „Licensing“-tab ..... 22
- 7 SERVICEMANAGEMENT – DOCUMENTSCOREPACK..... 26
- 7.1 CRM Connection Setup ..... 27
- 7.2 License ..... 28
- 7.3 Log ..... 28
- 8 UPGRADE ..... 29

9	DOCUMENTSCOREPACK SERVER CONFIGURATION .....	30
9.1	The "Ribbon"-tab .....	32
9.2	The "General Settings"-tab.....	40
9.3	The "SharePoint"-Tab .....	42
9.3.1	Save documents in SharePoint – Save in Folders Settings.....	43
9.3.2	Save documents in SharePoint – Save in Sites Settings.....	49
9.4	The "Advanced"-Tab .....	53
9.5	Additional steps for DocumentsCorePack Directory Security .....	55
10	HOW TO INSTALL DOCUMENTSCOREPACK IN AN IFD/CLAIMS-BASED ENVIRONMENT .....	57
11	TROUBLESHOOTING .....	62
12	WINDOWS 8 WIF FRAMEWORK INSTALLATION (WINDOWSIDENTITYFOUNDATION) .....	63
13	DOCUMENTSCOREPACK TEMPLATES .....	64
13.1	How to create DocumentsCorePack Templates.....	64
13.2	Import existing DocumentsCorePack Templates.....	64
13.2.1	Import a Folder / Import a File .....	67
13.2.2	Processing Import.....	68
14	LANGUAGE SETTINGS FOR DOCUMENTSCOREPACK .....	69
14.1	Language Settings on the Client .....	69
14.1.1	Location of the Language Settings on the Client.....	69
14.1.2	Modify the UI language on the Client .....	69
14.1.3	How to translate a language file.....	70
14.2	Language Settings on the Server .....	71
14.2.1	Location of the Language Settings on the Server.....	71
14.2.2	How to translate a language file.....	71
15	PER USER LICENSING –OPTION .....	72
15.1	Important Information.....	73
16	UNINSTALL DOCUMENTSCOREPACK SERVER COMPONENT .....	74
17	INSTALLATION CLIENT COMPONENT.....	76

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17.1	Installing the DocumentsCorePack Client .....	76
17.2	End User License Agreement (EULA) .....	77
17.3	Select the installation folder .....	78
17.4	Configure CRM Server .....	79
17.5	DocumentsCorePack Client Options .....	80
17.6	Finish.....	81
17.7	The "www.mscrm-addons.com"-tab.....	81
17.8	Installation on a Terminal Server / Windows Server 2008 .....	82
17.9	Unattended Setup DocumentsCorePack Client for MS CRM 2013 .....	86
18	UNINSTALL DOCUMENTSCOREPACK CLIENT COMPONENT .....	87
19	CONTACT .....	88

## 1 Common Information

Before installing **DocumentsCorePack Server for MS CRM 2013**, please read this document and follow the steps carefully.

This setup contains all installations needed for using DocumentsCorePack Server based document generation for MS CRM 2013. This guide contains detailed information for the installation and the configuration of:

- *DocumentsCorePack Server-based document generation and processing (former AutoMerge)*

### 1.1 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 steps to complete the installation:

- Installing DocumentsCorePack Server for MS CRM 2013
- Configuring DocumentsCorePack Server for MS CRM 2013

## 2 License

The product comes with a 14-day trial license. Information about licensing can be found on [www.mscrm-addons.com](http://www.mscrm-addons.com)

## 3 Prerequisites

### 3.1 Microsoft .NET Framework 4.0 RTM is required

The RTM version of Microsoft .NET Framework 4.0 is required.

### 3.2 Supported CRM Versions

- Microsoft Dynamics CRM 2013 RTM On Premise
- Microsoft Dynamics CRM 2013 RTW Online
- Microsoft Dynamics Hosted (IFD)

### 3.3 Windows Identity Foundation

The Windows Identity Foundation is included in the setup and will be installed as part of the DocumentsCorePack Server Installation.

### 3.4 Supported Operating Systems

- Windows 7 32/64bit
- Windows Vista 32/64bit
- Windows Server 2008 32/64bit
- Windows Server 2008 R2 32/64bit

## 4 Installation Server Component

You could install the DocumentsCorePack Server-based document generation on every supported operating system which is able to connect to your CRM 2013 server. DocumentsCorePack client for Microsoft Dynamics CRM 2013 can be installed on every supported client operation system. During the installation you have to specify at least one organization in which the DocumentsCorePack Server and Client will be installed.

#### **Possible Installation Scenarios:**

1. *Install directly on a CRM 2013 On-Premise Server*

You could install the DCP Server directly on a CRM 2013 On-Premise installation. By doing so, you will have full functionality like File Explorer- or SharePoint-integration. When you specify an On-Premise Connection Profile, you have to run the setup on the CRM server.

2. *Install for CRM Online*

When you want to use CRM Online, you could install DCP on every supported operating system. You have to specify a valid CRM Online profile. In that case you have limited functionality of the DocumentsCorePack Server. You could not use the following features:

- a. SharePoint Folder and Site integration
- b. File Explorer integration

**Attention:** After the setup is completed, you could start the DocumentsCorePack Server Configuration in the Windows Start-menu to install and configure the DocumentsCorePack Server in other CRM organizations.

## 4.1 AutoMerge Online Service Configuration

The web-based setup allows users to configure AutoMerge for MS CRM Online without any local installations. The service as well as licensing can be configured and maintained on our website. (Only available for MS CRM 2013 Online (RTW) / Hosted (IFD)).

For detailed information for On-Premise Installations please read chapter 7 [ServiceManagement for DocumentsCorePack](#).

Follow the links listed below for detailed information:

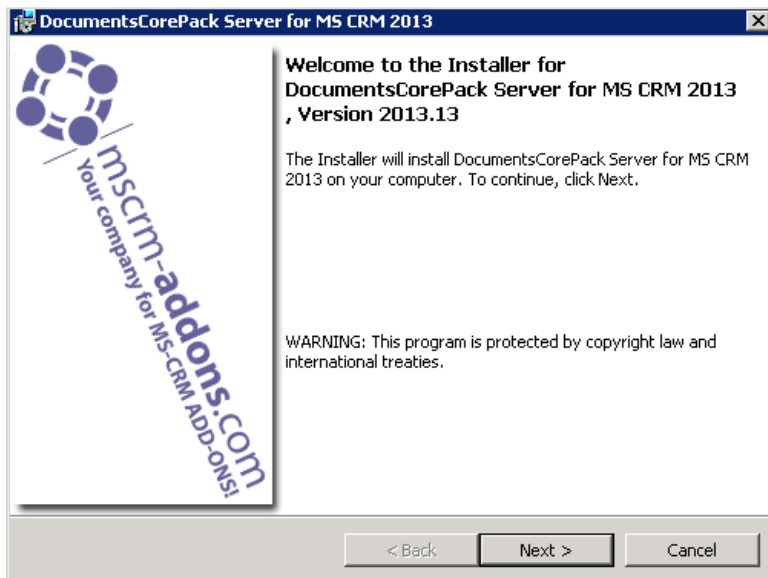
[Start Trial/Configure Services for AutoMerge for MS CRM Online](#).

[Watch our AutoMerge Online Service Configuration YouTube Video](#).

[AutoMerge Online Service Configuration User Guide](#).

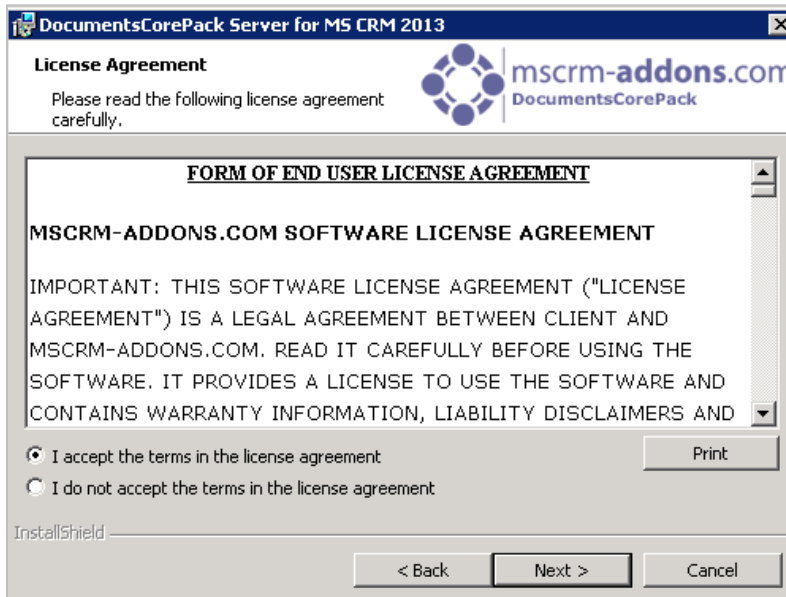
## 4.2 Introduction

Run the DocumentsCorePack Server for MS CRM 2013 setup file. The following window will appear:



Click [Next] to proceed. INFORMATION: If an upgrade is detected, a message will be shown and the setup will go to chapter [4.2.3 "Confirm Installation"](#), directly after accepting the [EULA \[4.2.1\]](#).

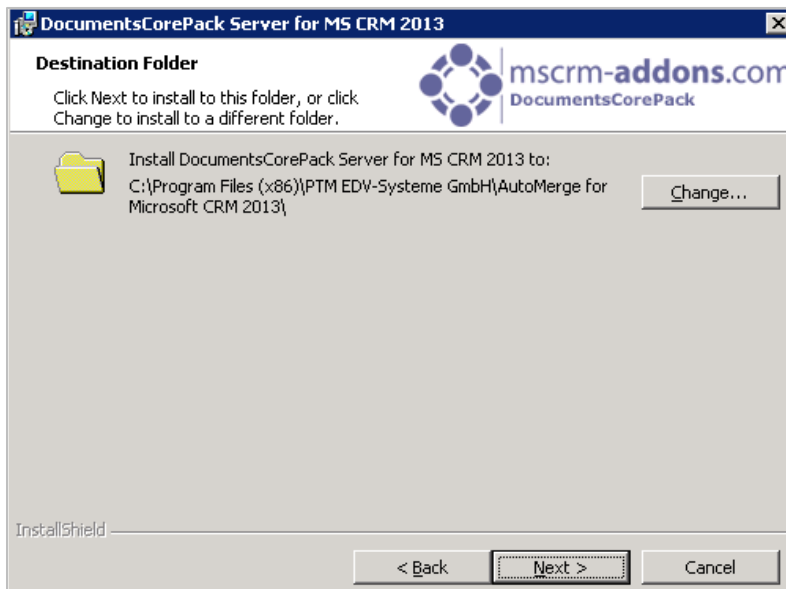
#### 4.2.1 EULA (End User License Agreement)



Click [Next] to proceed.

#### 4.2.2 Folder Selection

Here it's possible to set the installation directory.



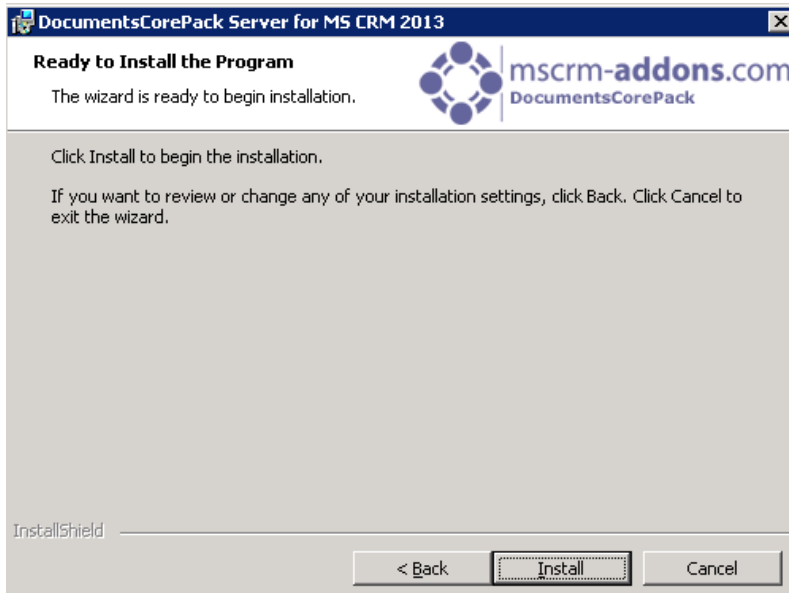
Click [Change] to specify a different installation path. Click [Next] to proceed.



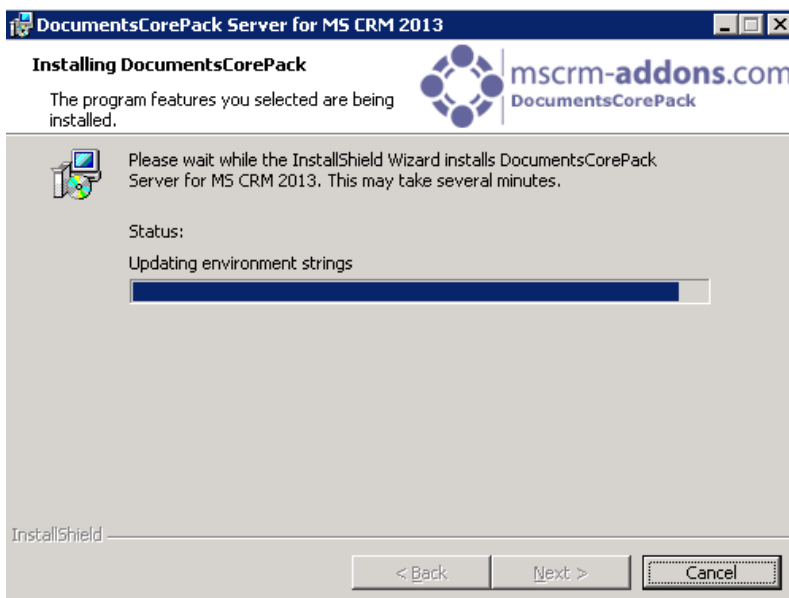
### 4.2.3 Confirm Installation

To start the installation, click on [Install].

To change the settings, click on [Back].

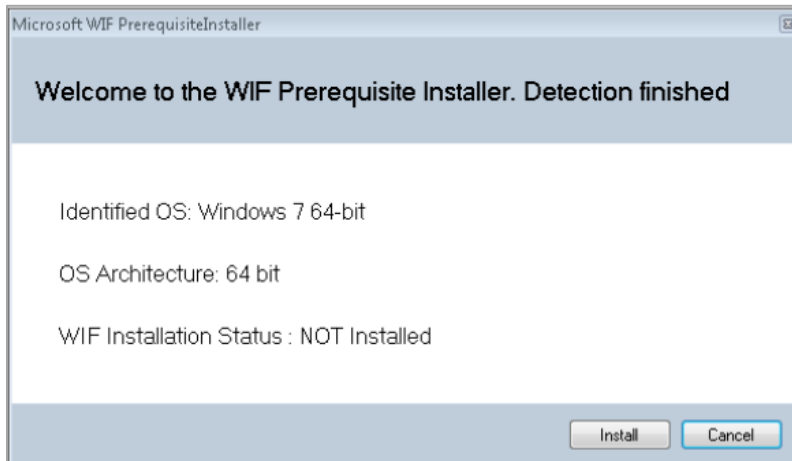


While the installation is running, following window appears:



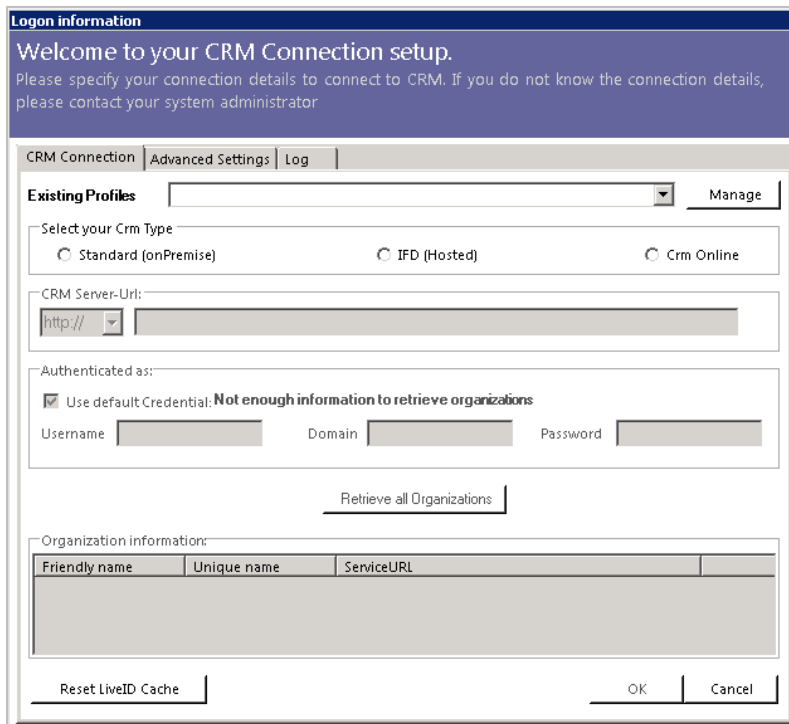
#### 4.2.4 Install Windows Identity Foundation

To use the DocumentsCorePack Server for MS CRM 2013 you have to install the Windows Identity Foundation. This window will only pop up when the Windows Identity Foundation is not installed.

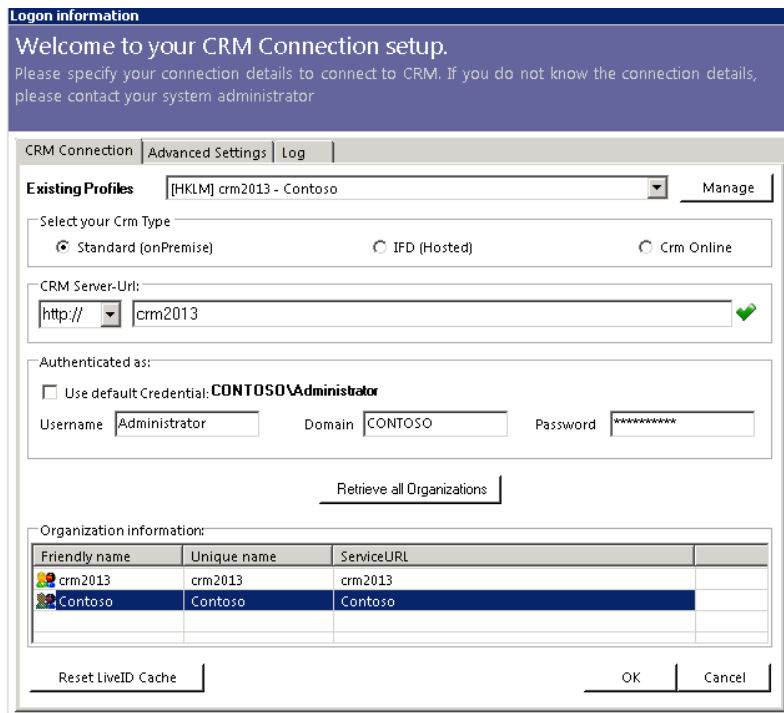


#### 4.2.5 Configure CRM Server

During the installation, following CRM Connection setup window appears:

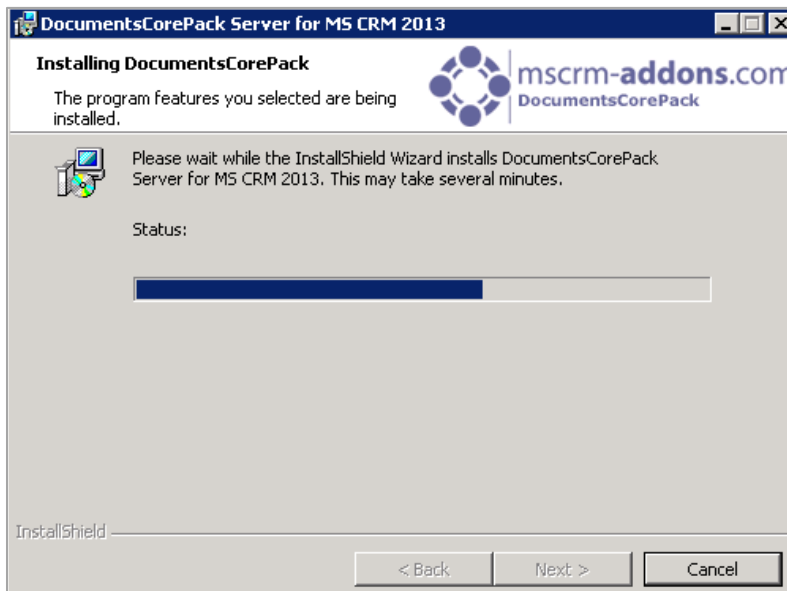


To configure your CRM server, select your profile or create a new profile and select your CRM Server type. Choose the server path and add your login credentials by filling in the field's username, password and domain or choose the default credentials. Click on [Retrieve all Organizations], as soon as the organizations are retrieved, choose one and press the "OK"-button. (See next screenshot).



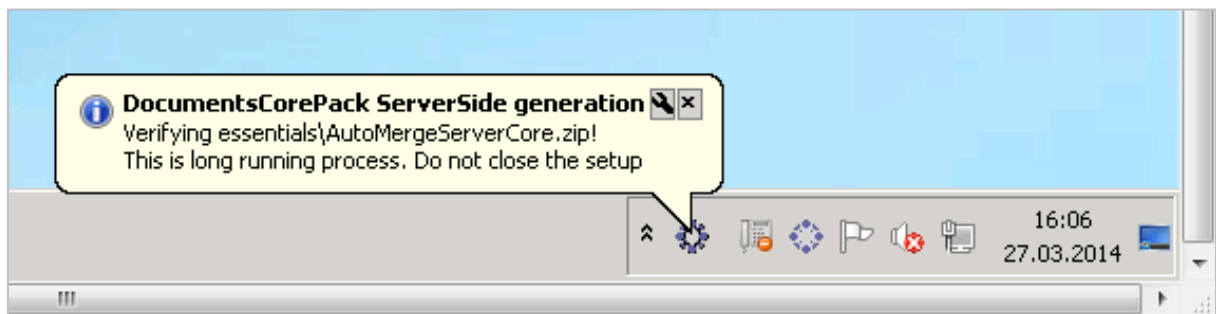
For DocumentsCorePack, the IFD setup is only required when using SharePoint Folder and Sites Integration. You have to install IFD before you can use it. You can find the IFD wizard here: <http://www.mscremaddons.com/Downloads/DownloadIFDToolforMSCRM2011/tabid/195/Default.aspx>

Click on [OK] to continue. Following windows appear





The installation can take a while. Please do not close the window. As reminder you will see following message-box in the Task pane:



If and old DocumentsCorePack version is detected while installation, you will be prompt to uninstall. For details please read [chapter 5 "Obsolete products overview"](#).

#### 4.2.6 Security Roles

##### **General security roles for all products:**

The following security role is required by all our products:

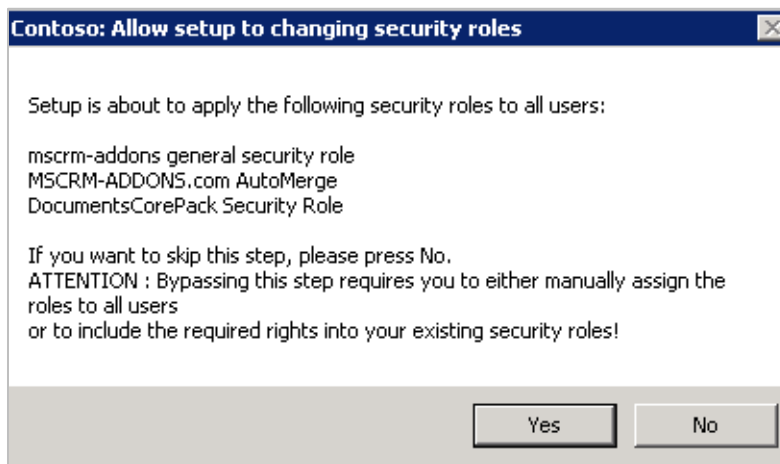
- MSCR-Addons General Security Role

This security role contains the basic requirements for using the product itself and to be able to perform the license-check.

##### **Product-specific security roles:**

Following security roles are required only by specific products. All users that should work with the products require both the MSCR-Addons General Security Role and the product-specific security roles.

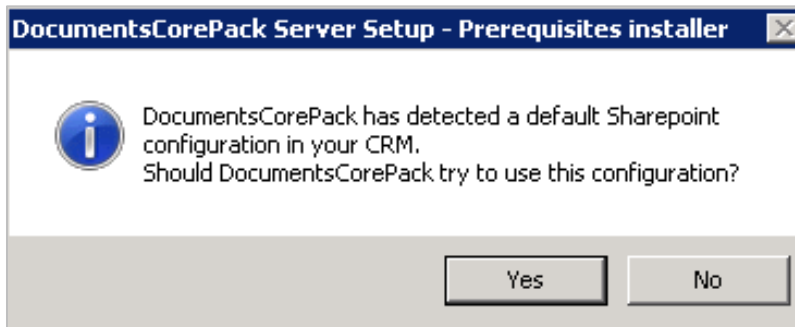
- **DocumentsCorePack:**  
DocumentsCorePack Security Role
- **AutoMerge**  
MSCRM-ADDONS.com AutoMerge



Click [Yes] to allow setup to changing these security roles. Click [No] to skip this step.

NOTE: Bypassing this step requires you to either manually assign the roles to all users or to include the required rights into your existing security roles!

If a SharePoint is already configured in your CRM-System, following window appears:



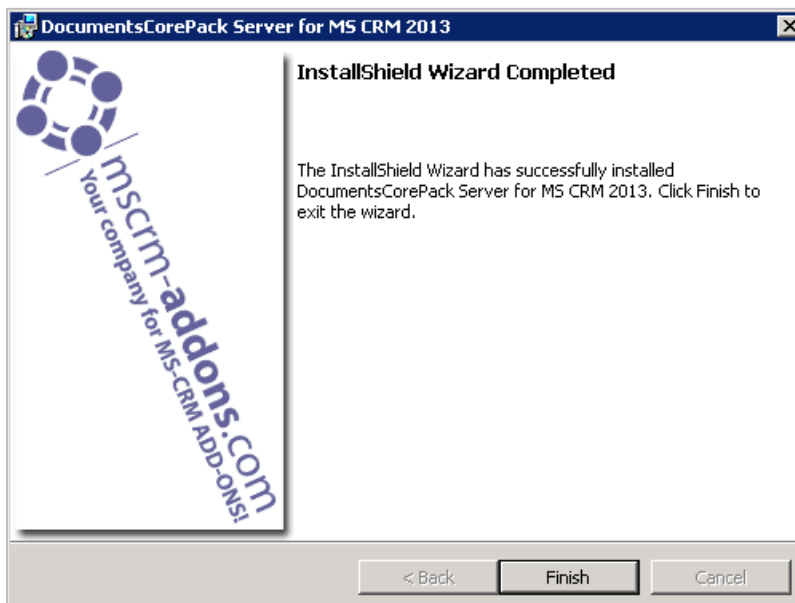
Click [Yes] to allow DocumentsCorePack Server Setup to use this SharePoint.  
Click [No] to skip this step.

Please read [chapter 9.3 "SharePoint"](#) for detailed information on how to configure your SharePoint.

#### 4.2.7 Finish Installation

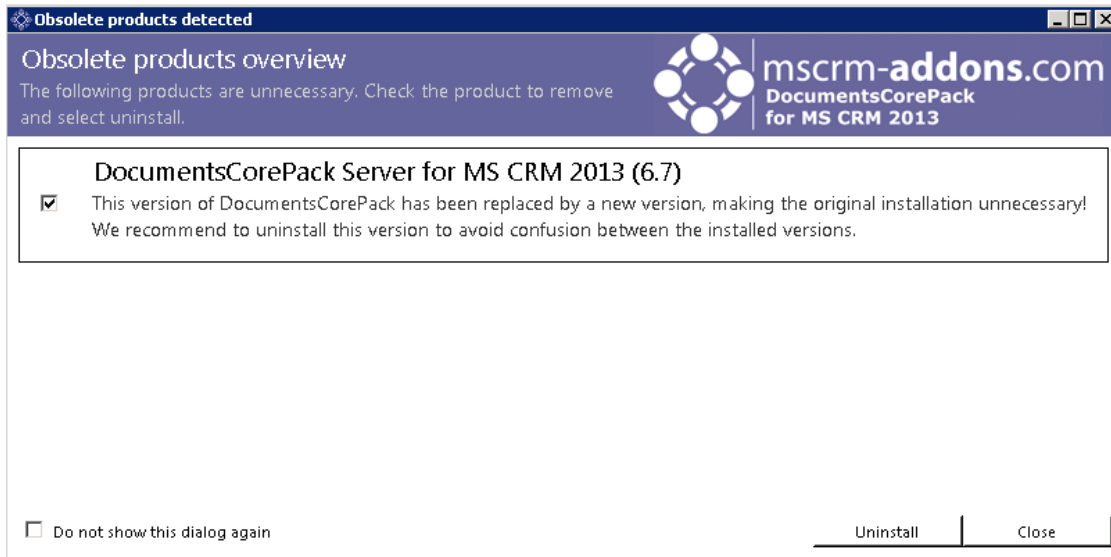
The DocumentsCorePack Server Configuration will start automatically for the organization you selected during the setup. Click on [Finish] to continue.

**NOTE:** If an obsolete products has been detected during setup you will be asked to delete the unnecessary product(s) to avoid confusion between the two products. See next [chapter 5 Obsolete Products Overview](#).



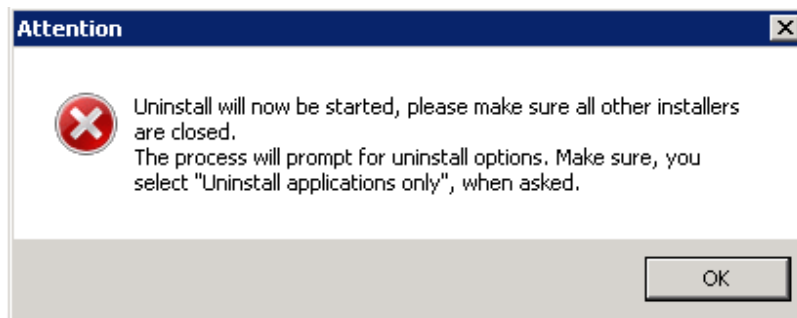
## 5 Obsolete Products Overview

If an old DocumentsCorePack Server for MS CRM 2013 version is detected during the setup following window appears:

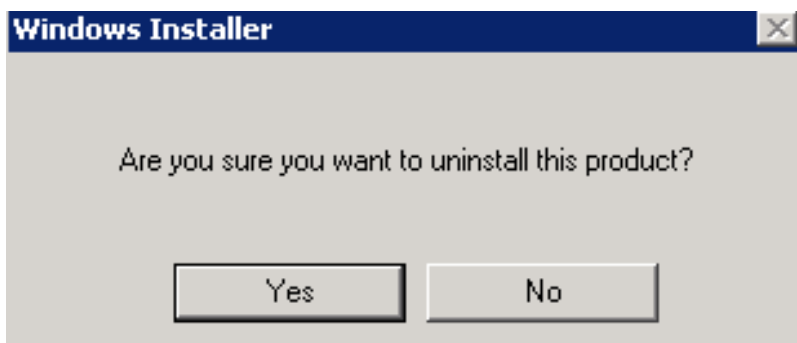


Click on [Uninstall] to remove the unnecessary product(s) to avoid confusion between the installed versions!

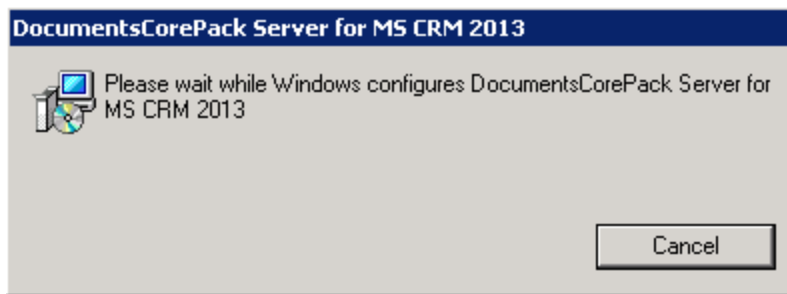
Following window appears:



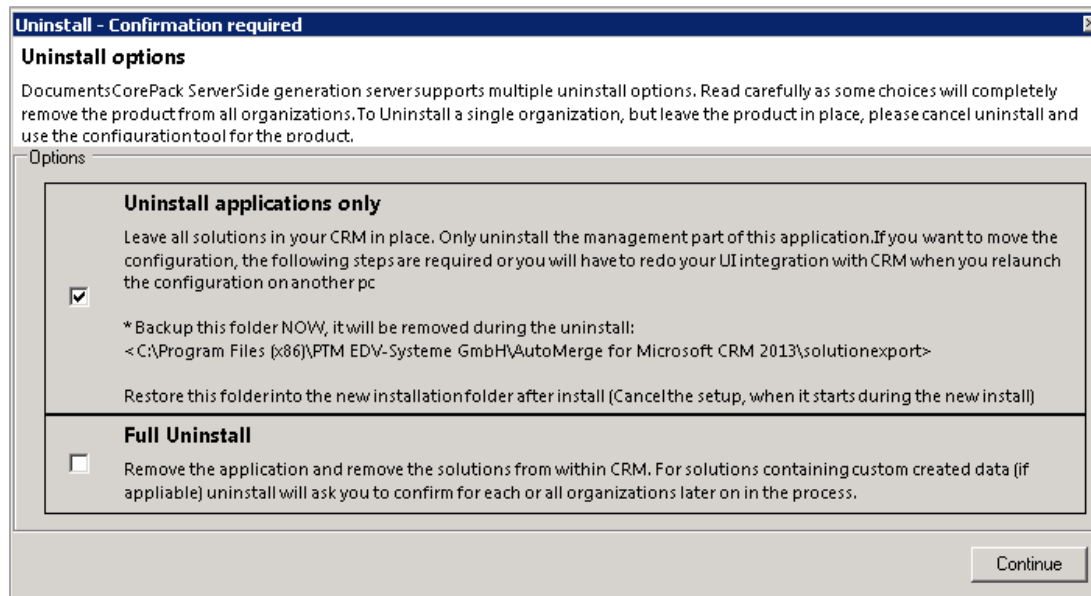
Click on [OK] to continue. Following window appears:



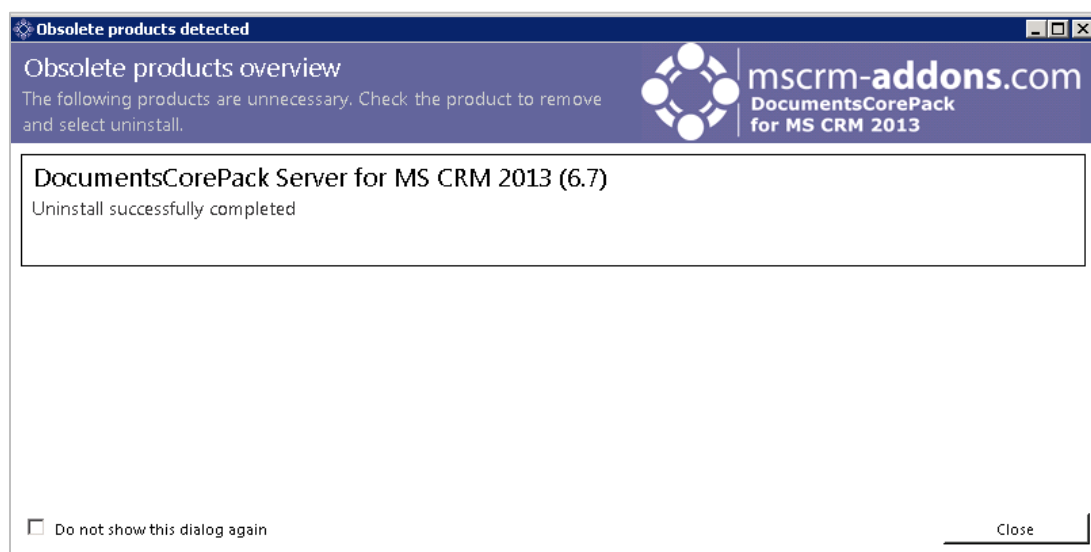
Click on [Yes] to confirm uninstall. Following window appears:



**NOTE:** Please select "Uninstall applications only" and click on [Continue] !



If Uninstall is finished, following window appears:



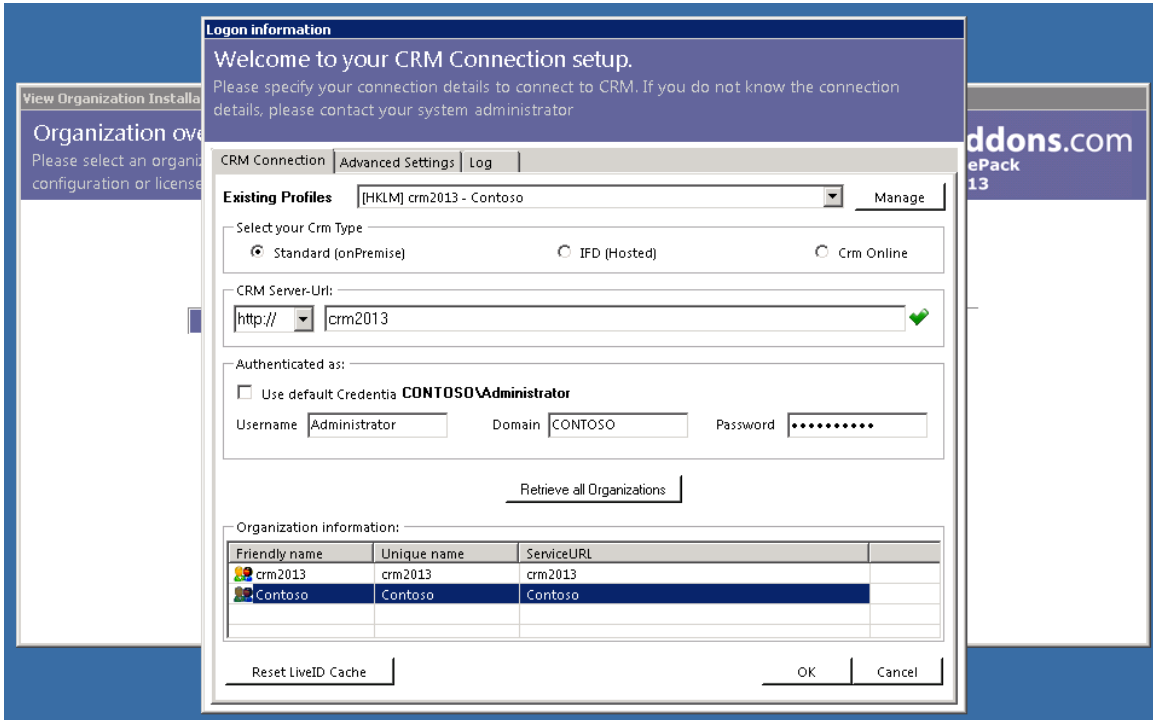
Now Uninstall of the old product(s) is finished and the setup will go on with the configuration if you click on [Close].



## 6 DocumentsCorePack Server Configuration

Once installation is finished, following window appears:

The DocumentsCorePack Server Configuration can also be found in the windows start pane. Search for the the www.msrm-addons.com -folder and choose

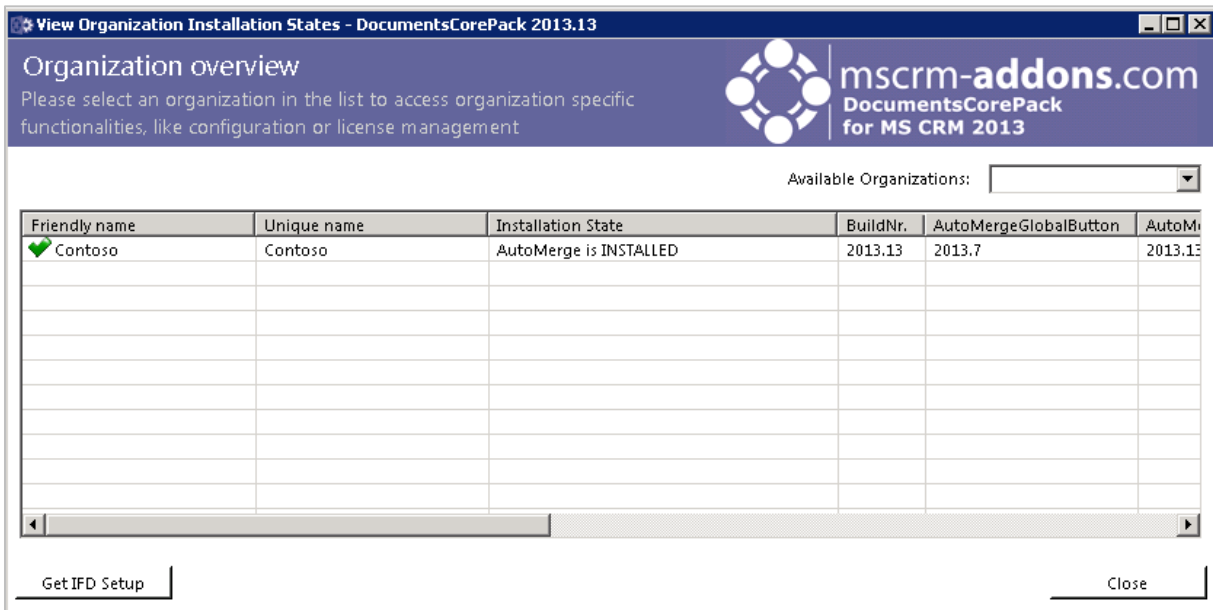


Choose your organisation – usually you just have to click [OK] to continue.

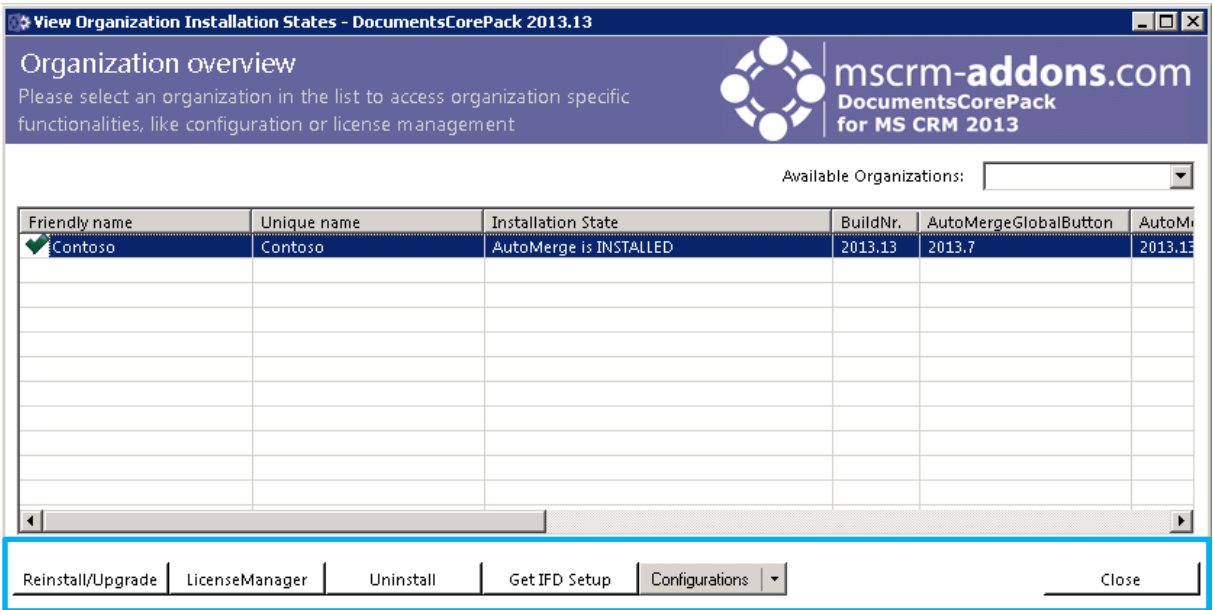
Following window appears:



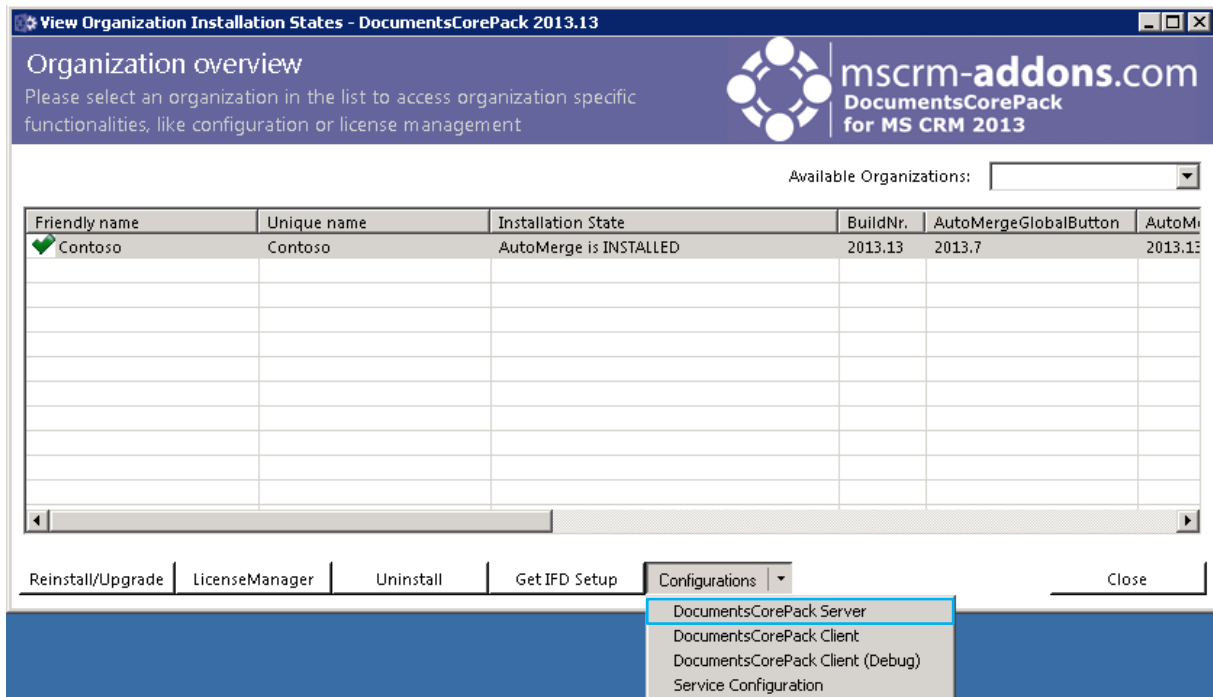
The next window shows the organization overview:



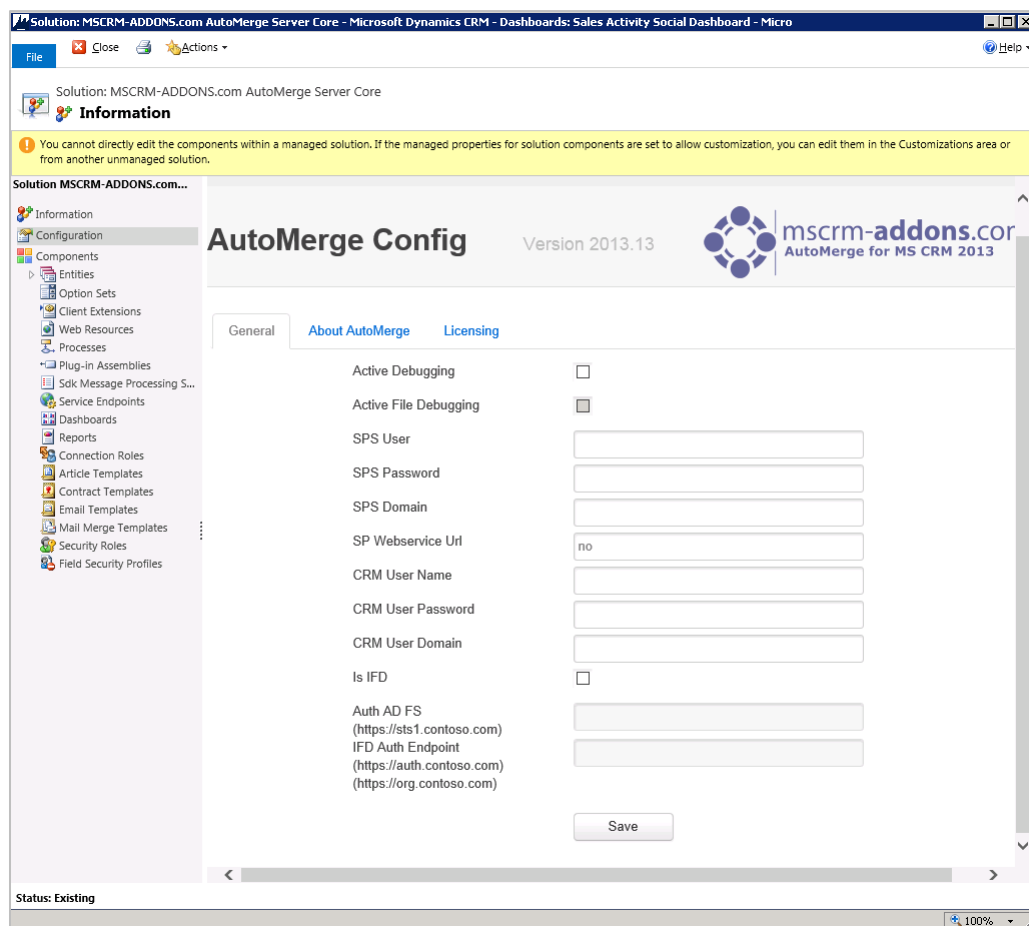
Choose the appropriate organisation to continue:



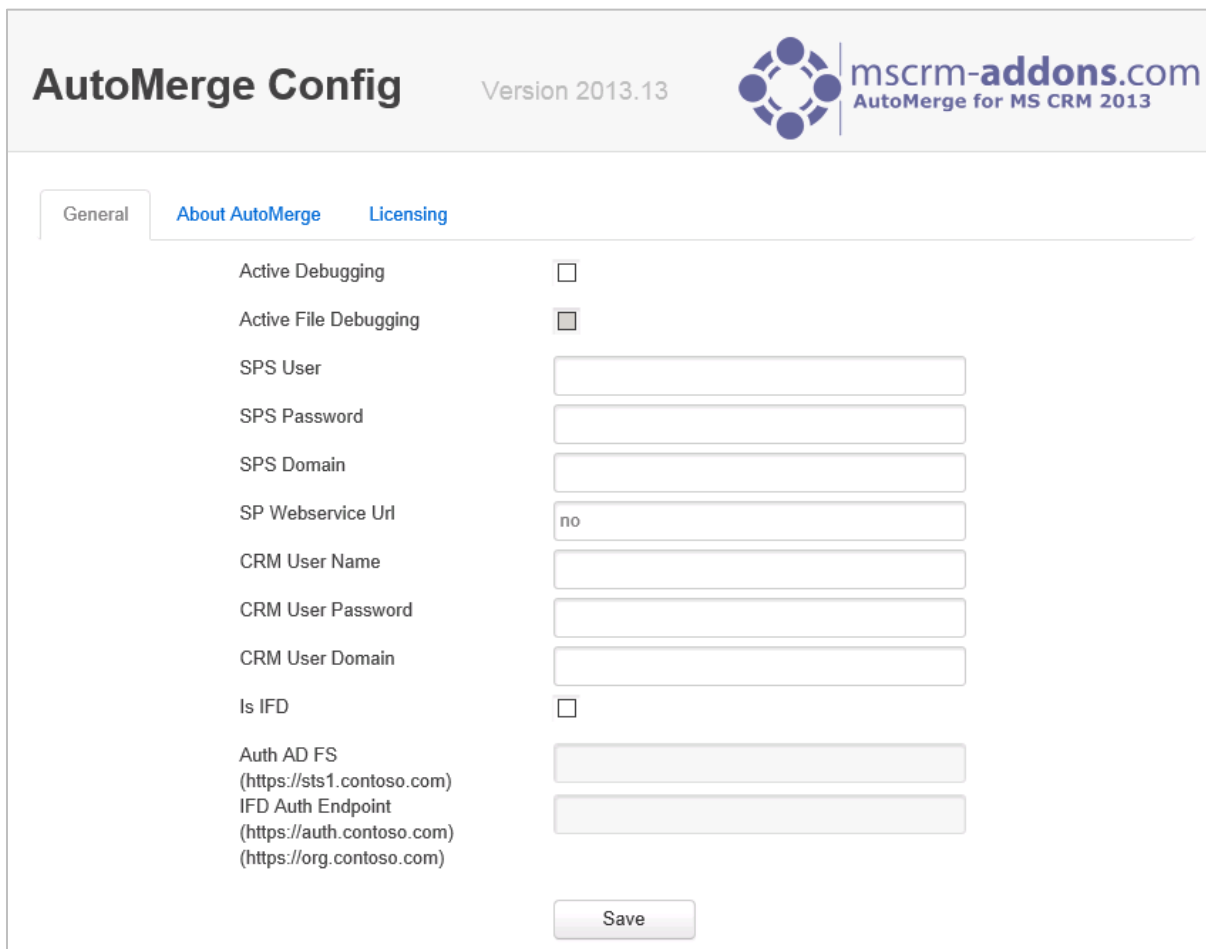
Click on the dropdown button next to [Configurations] to open the appropriate configuration:




The server side configuration window in your CRM-System opens:



## 6.1 "General"-tab



**AutoMerge Config** Version 2013.13  mscrm-addons.com  
AutoMerge for MS CRM 2013

General About AutoMerge Licensing

Active Debugging

Active File Debugging

SPS User

SPS Password

SPS Domain

SP Webservice Url

CRM User Name

CRM User Password

CRM User Domain

Is IFD

Auth AD FS   
(https://sts1.contoso.com)

IFD Auth Endpoint   
(https://auth.contoso.com)  
(https://org.contoso.com)

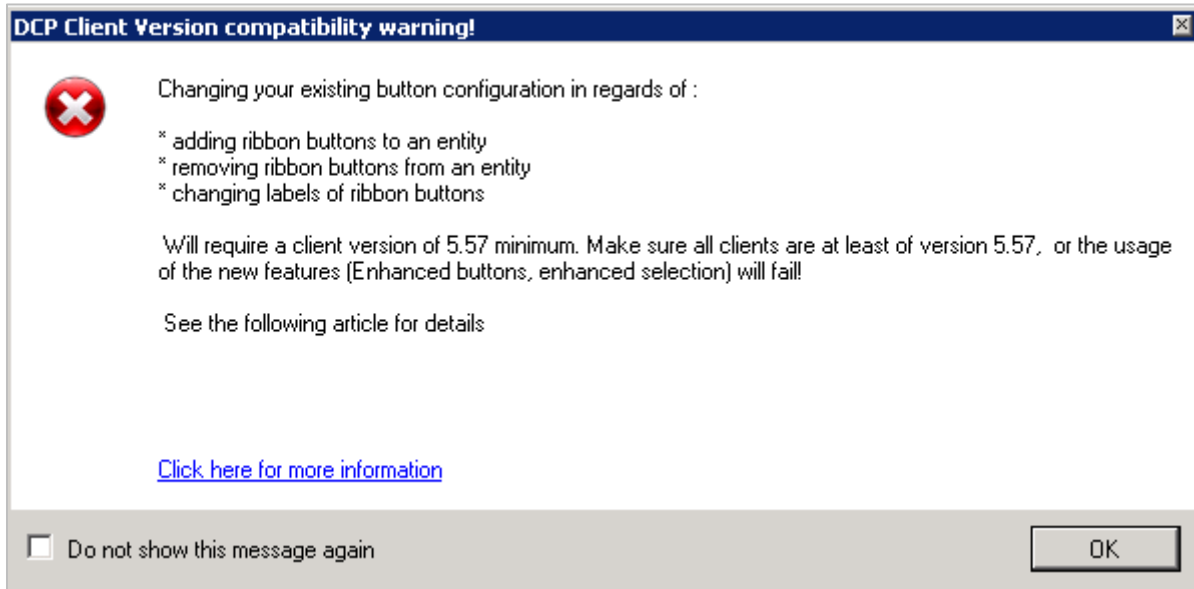
Save

Use the "General" – tab to adjust the following settings:

- **Activate Debugging:** If you tick this box, debugging will be activated. That means that the AutoMerge plugin will write log files. Debugging should only be activated if there is a problem with the AM plugin, because it will slow down the whole process.
- **SPS User:** Use this textbox to define the SharePoint user.
- **SPS Password:** Use this textbox to define the password of the SharePoint user.
- **SPS Domain:** Use this textbox to define the domain of the SharePoint user.
- **SP Webservice URL:** Use this textbox to define the documentation web service URL. This service is used to generate the documents with the plugin. The value of this setting will be generated automatically. This needs to be edited manually only in special cases.

**[Save]** – button: Use this button to save your settings.

If following window appears, please make sure, that you have at least installed DocumentsCorePack Client version 5.57 or higher. Please follow the link for details.



## 6.2 „About AutoMerge“-tab




This tab does not contain any settings. It only displays information about the current version and the copyright.

## 6.3 „Licensing“-tab

AutoMerge Config

Version 2013.13


 mscrm-addons.com  
 AutoMerge for MS CRM 2013

General
About AutoMerge
Licensing

General license information

Licenseinformation	LicenseValue	Systemvalue	Status
Licensemodel			i
Licensekey	Trialkey		i

License validation information

Licenseinformation	LicenseValue	Systemvalue	Status
BusinessUnit	Contoso	Contoso	✔
Number of site licenses	13	13	✔
Licenses for Readonly Users	0	0	✔
Expiration		4/9/2014 4:33:08 PM (13 days left)	i
Support	Never		✔
Issued product	AutoMerge	AutoMerge	✔
Version upgrade covered till	1/1/0001 12:00:00 AM	1/1/0001 12:00:00 AM	✔

License summary

Licenseinformation	LicenseValue	Systemvalue	Status
LicenseState		trial	⚠

This tab is important for the following two reasons:

1. Show license info
2. Install a new license key

### 6.3.1 Show license Info

All information about your AutoMerge license and system values is displayed.

The first column of the table determines the information-type, the second contains the license-key values and the third the system-values. Here is a short description of the information-types:

- **Licensemodel:** the type of the licensing (per site or per user)
- **Licensekey:** shows the installed license key
- **BusinessUnit:** shows the current business unit
- **Number of site licenses:** the amount of licensed users
- **Licenses for Readonly Users:** the amount of licensed read only users
- **Expiration:** the expiration-date of the license (by default: never)
- **Support:** the expiration-date of your support contract
- **Issued product:** the name of the current product
- **Version upgrade covered till:** the date to which you can install the latest version by downloading it from our homepage (Upgrades are provided till the expiration-date of your support contract.)
- **LicenseState:** shows the status of your license key

Maybe you have noticed that the license key is not fully displayed in the table. If you would like to see the full license key, click on it. Then, a new dialog with the entire key will open.

## 6.3.2 Install a new license key

For installing a new license key, open the install license key-dialog. To do so, click on "Install license":

### Install License

**This dialog can be used to install the license for AutoMerge 2013.**

If you already have received an email with the license key form "support@mscrm-addons.com" please follow the steps below to install the license.

If you don't have a license yet and want to buy one please click on [Online Shop](#). It will link you directly to our Online Shop.

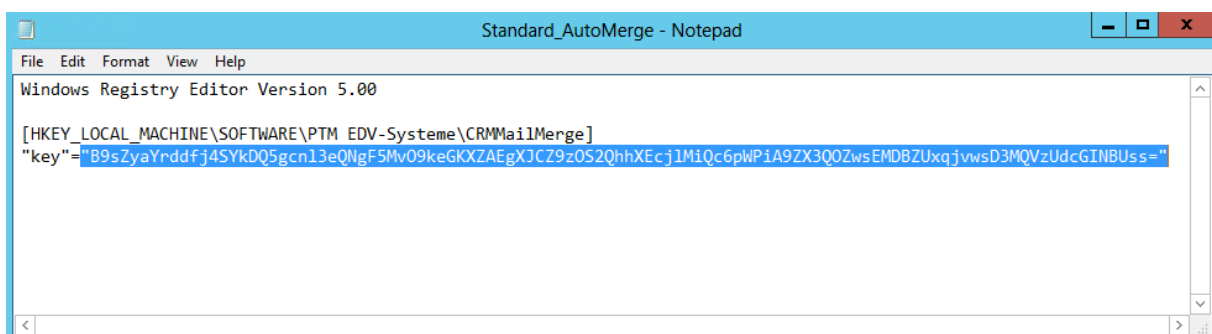
Of course you can contact us directly: [Email to Support](#)

**Install the license:**

1. Please open the email with the license key. Copy the key and paste it into the following box:

2. To finish the installation please hit the "Install"-button.

After you have placed an order for AutoMerge, you will receive an email from [support@mscrm-addons.com](mailto:support@mscrm-addons.com) including a zip folder with the license key. Open the folder and copy the whole license key. See next screenshot:





Copy the whole license key (as highlighted in the example above) and paste it into the textbox of the install license-dialog. See next screenshot:

## Install License

**This dialog can be used to install the license for AutoMerge 2013.**

If you already have received an email with the license key form "support@mscrm-addons.com" please follow the steps below to install the license.

If you don't have a license yet and want to buy one please click on [Online Shop](#). It will link you directly to our Online Shop.

Of course you can contact us directly: [Email to Support](#)

**Install the license:**

1. Please open the email with the license key. Copy the key and paste it into the following box:  

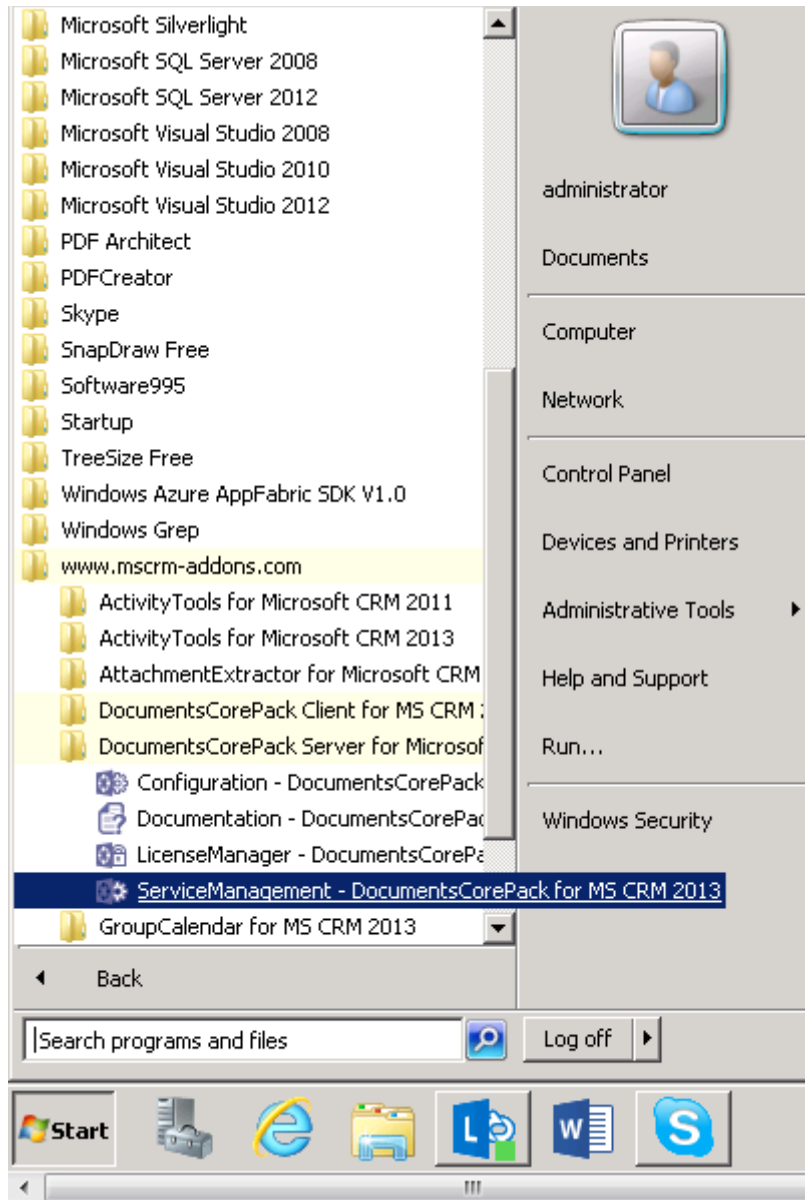
`B9sZyaYrddfj4SYkDQ5gcnl3eQNgF5MvO9keGKXZAEgXJCZ9zOS2QhhXEclMi  
Qc6pWPiA9ZX3QOZwsEMDBZUxqjwvsD3MQVzUdcGINBUss=`
2. To finish the installation please hit the "Install"-button.

To start the install process of the license key hit [Install].

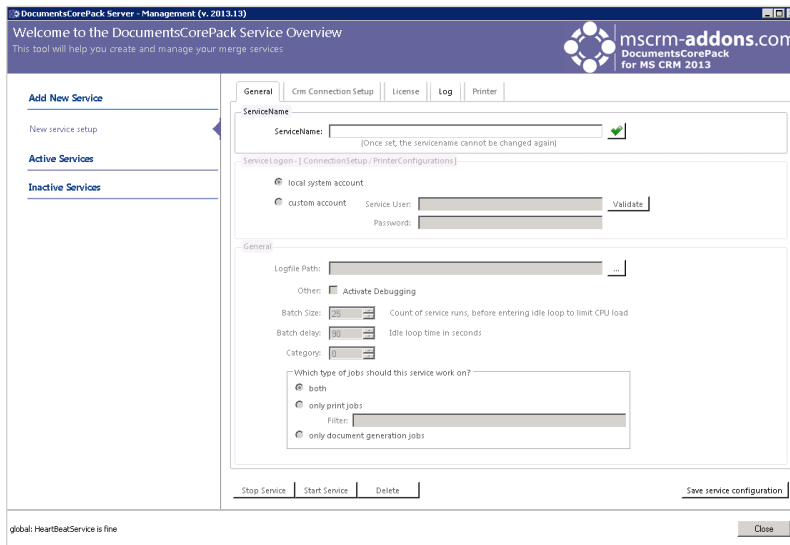
The configuration will install the license and updates the table with the new license information.

## 7 ServiceManagement – DocumentsCorePack

Search for **“ServiceManagement – DocumentsCorePack for MS CRM 2013”** in the Windows start-menu and run this application.

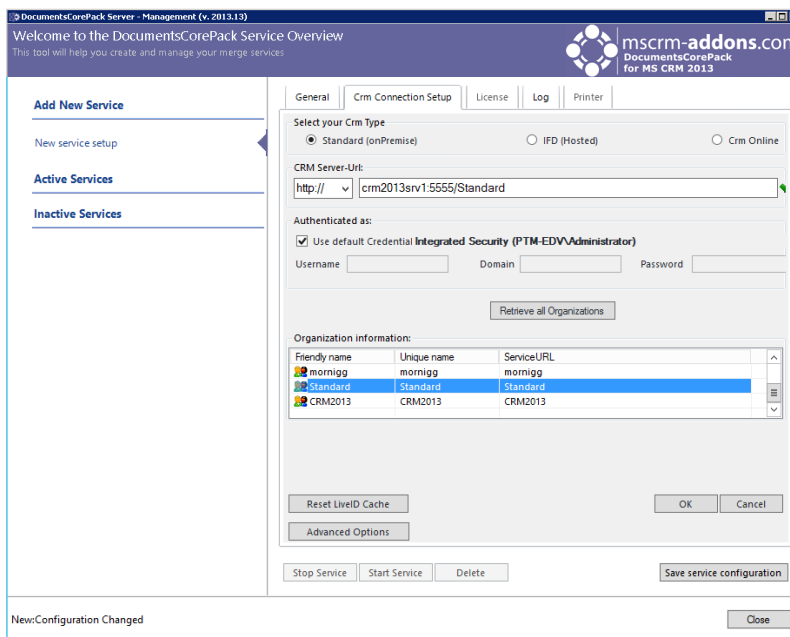


Following window appears:



Within the "General"-tab, you are able to put a name for your service and to specify the logfile-path. You are also able to activate debugging if there is a problem with your service. Click on [Save service configuration] to continue.

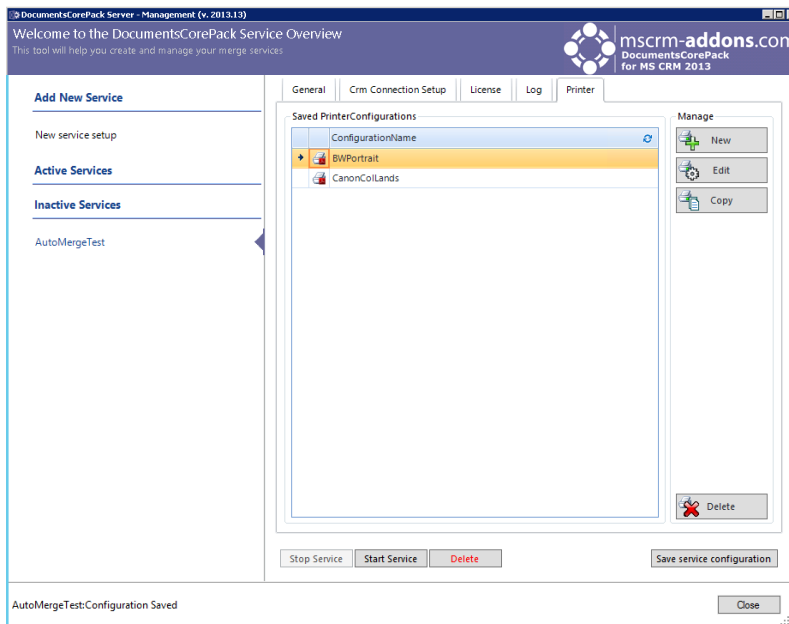
## 7.1 CRM Connection Setup



Again, you have to specify your CRM-connection in the CRM Connection Setup. Click on [Save service configuration] to continue.



## 7.4 Printer



DocumentsCorePack now offers a service-based printing option which is available additionally to the already known plugin-based printing-option. The additional option is available within DocumentsCorePack for MS Dynamics CRM 2013 v5.30 and higher and is based on a service which is running in the background.

For more information, please read our AutoMerge User Guide chapter 7.3 "Service based printing with AutoMerge". Please download on [www.mscrm-addons.com](http://www.mscrm-addons.com).

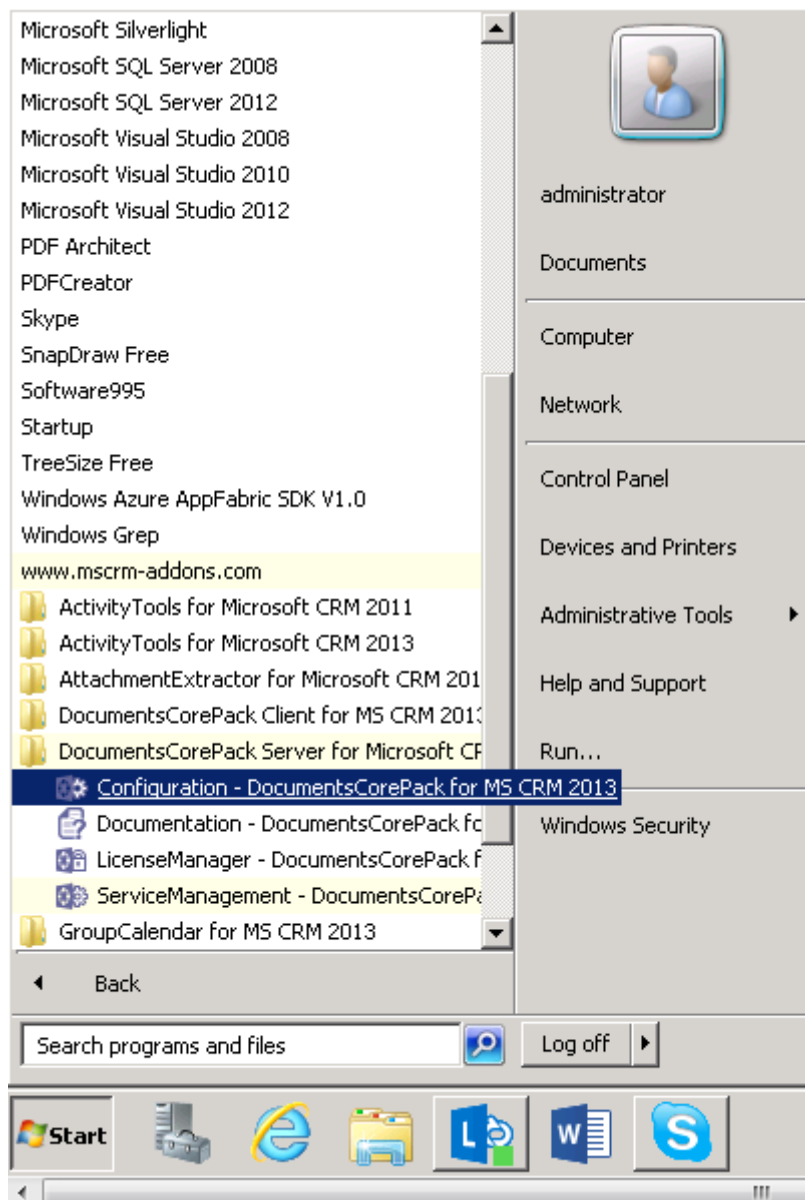
## 8 Upgrade

For upgrading your DocumentsCorePack version, just rerun the setup. The final step of the upgrade is to execute the DocumentsCorePack Configuration as shown in [chapter "6 DocumentsCorePack Configuration"](#). **The configuration is necessary to upgrade DocumentsCorePack properly!**

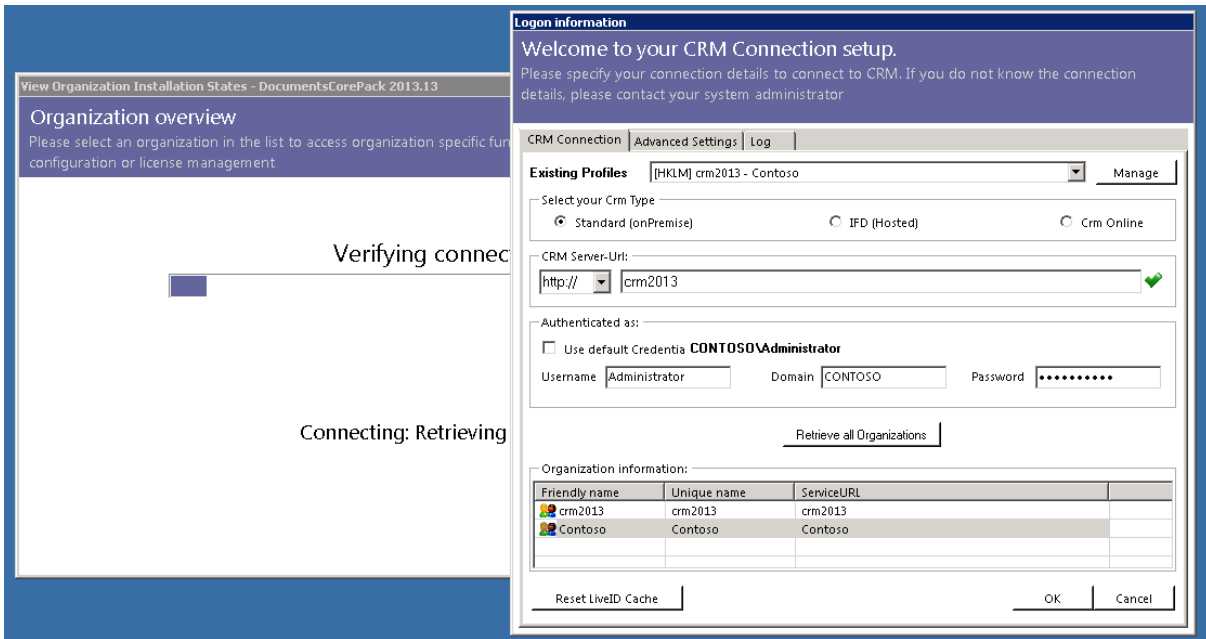
## 9 DocumentsCorePack Server Configuration

The DocumentsCorePack Server for MS CRM 2013 Configuration allows you to specify the DocumentsCorePack settings (e.g. configure on which entities you want to see the „Create Document“-Button etc.).

You can find the DocumentsCorePack Configuration if you click on the Start menu and search for the [www.msrm-addons.com](http://www.msrm-addons.com) folder. There you can find the folder **DocumentsCorePack Server for Microsoft CRM 2013 – choose Configuration – DocumentsCorePack for MS CRM 2013**. (See next screenshot).

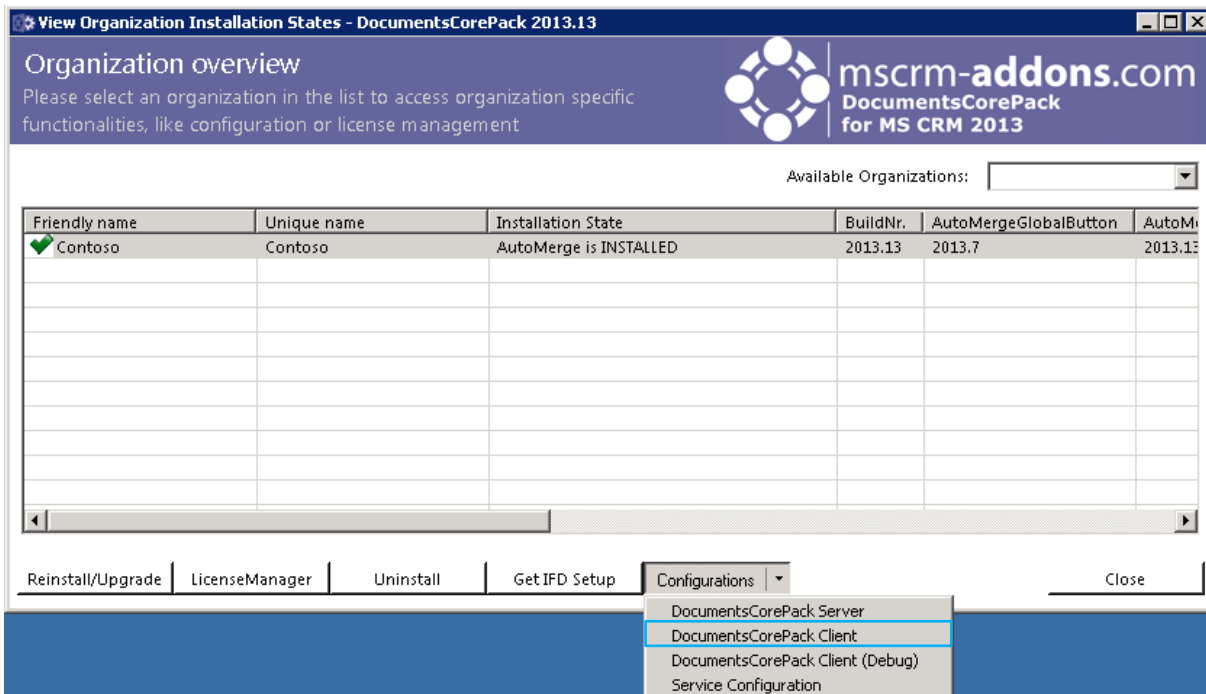


Following window appears:



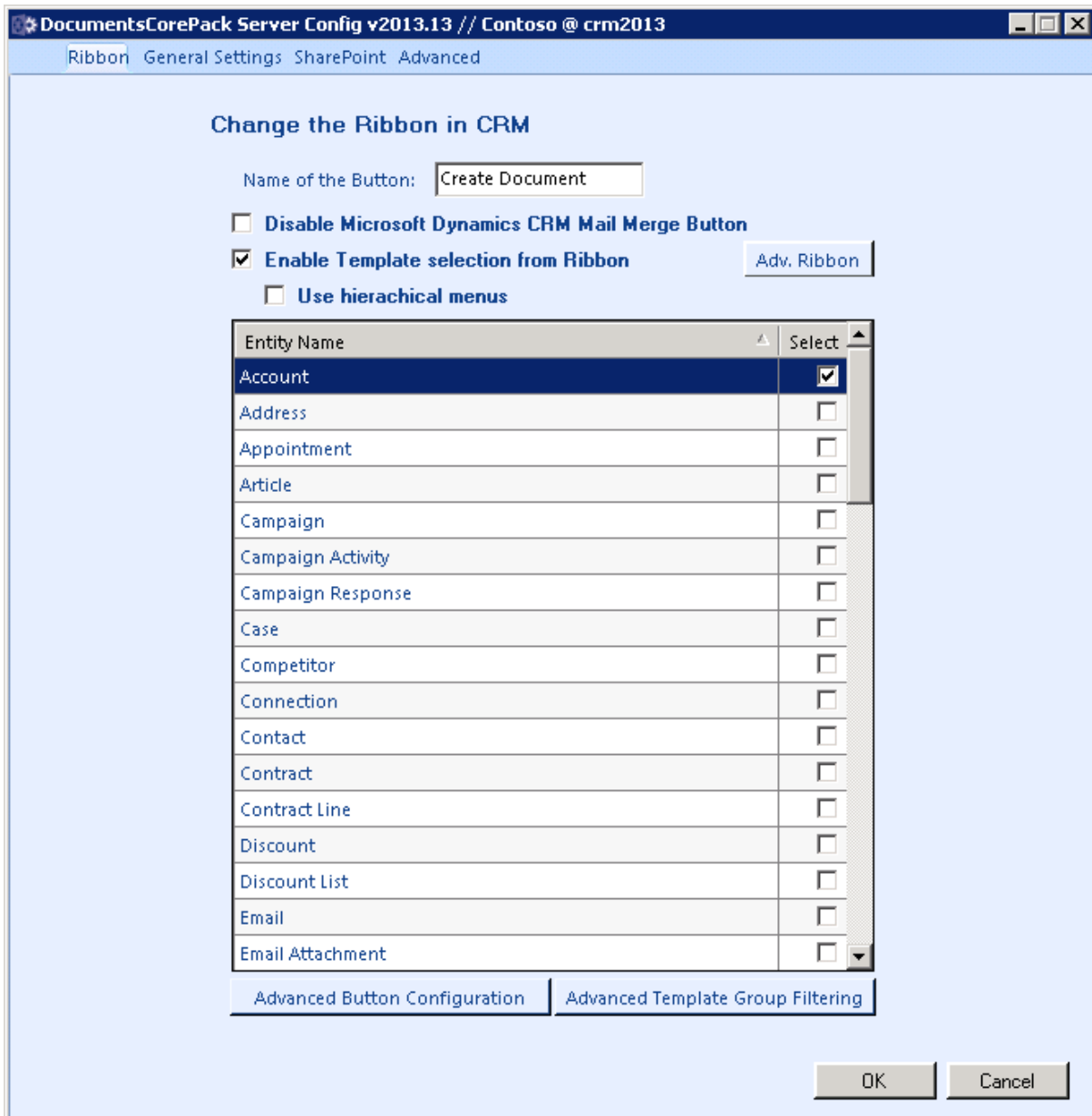
Choose your Organisation and click on [OK]. Usually you just have to click on [OK].

Following window appears:



After Starting the DocumentsCorePack Server Configuration click on the DocumentsCorePack Client. See next screenshot:

## 9.1 The "Ribbon"-tab



The screenshot shows a configuration window titled "DocumentsCorePack Server Config v2013.13 // Contoso @ crm2013". The window has tabs for "Ribbon", "General Settings", "SharePoint", and "Advanced". The "Ribbon" tab is active, displaying the "Change the Ribbon in CRM" configuration screen.

**Change the Ribbon in CRM**

Name of the Button:

**Disable Microsoft Dynamics CRM Mail Merge Button**  
 **Enable Template selection from Ribbon** Adv. Ribbon  
 **Use hierachical menus**

Entity Name	Select
Account	<input checked="" type="checkbox"/>
Address	<input type="checkbox"/>
Appointment	<input type="checkbox"/>
Article	<input type="checkbox"/>
Campaign	<input type="checkbox"/>
Campaign Activity	<input type="checkbox"/>
Campaign Response	<input type="checkbox"/>
Case	<input type="checkbox"/>
Competitor	<input type="checkbox"/>
Connection	<input type="checkbox"/>
Contact	<input type="checkbox"/>
Contract	<input type="checkbox"/>
Contract Line	<input type="checkbox"/>
Discount	<input type="checkbox"/>
Discount List	<input type="checkbox"/>
Email	<input type="checkbox"/>
Email Attachment	<input type="checkbox"/>

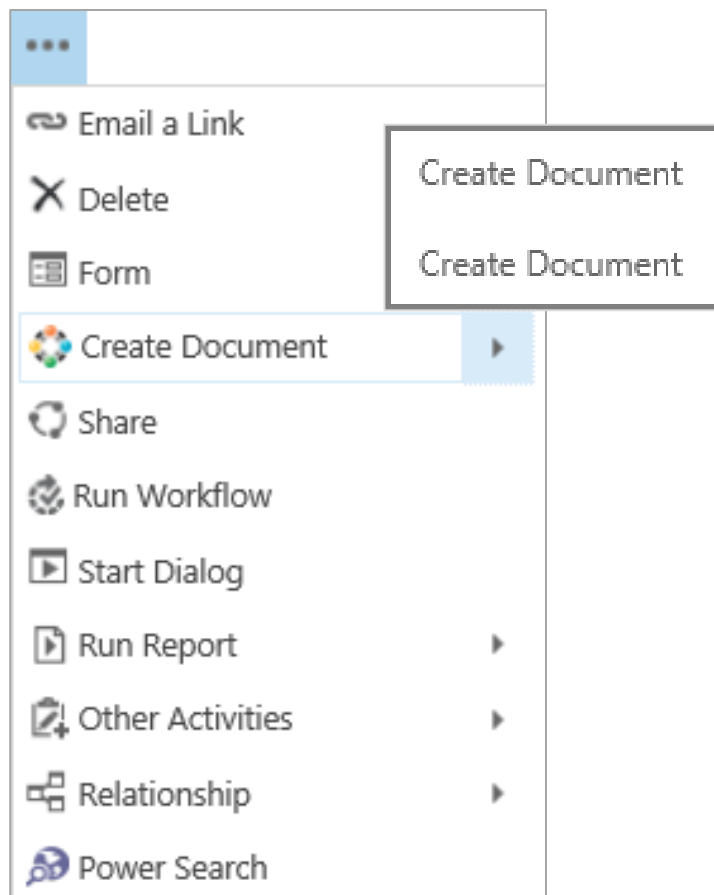
Here you can configure the entities where you want to see the "Create Document"-button and you can specify the text of the button. Furthermore, you are able to choose to disable the CRM Integrated Mail Merge functionality: This means that the permission to use the CRM Integrated Mail Merge is removed from every security role.

Please note that not every security role, e.g. System Administrator, can be modified. Users with these roles can still use the CRM Integrated Mail Merge.

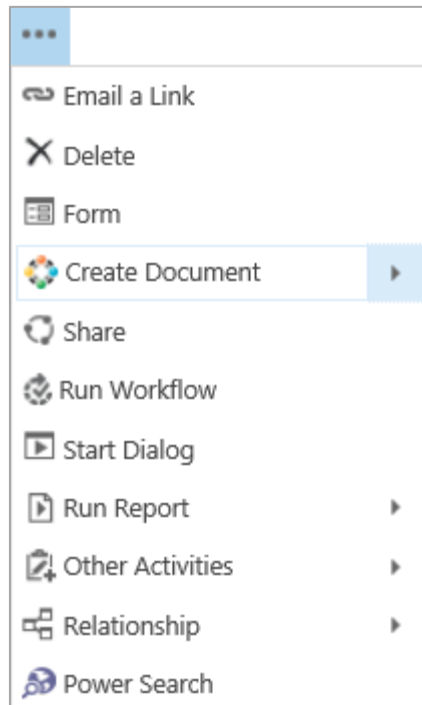




The "Enable Template selection from Ribbon" and the "Use hierarchical menus" will modify and convert the existing "Create Document"-button to a split button in CRM.

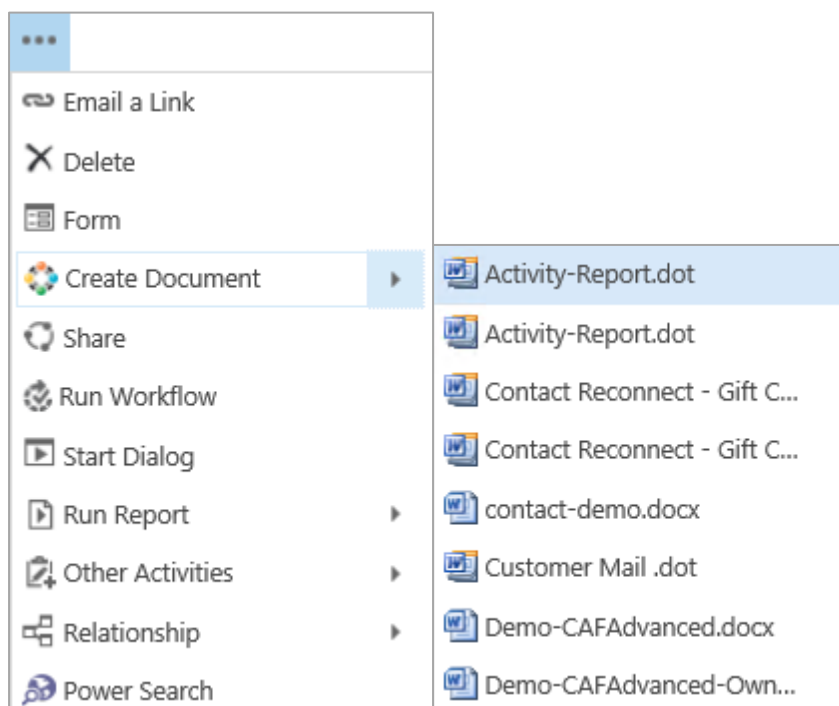


The top of the button will immediately start the merge as usual and the template selection has to be done using the "Open Template" dialog.

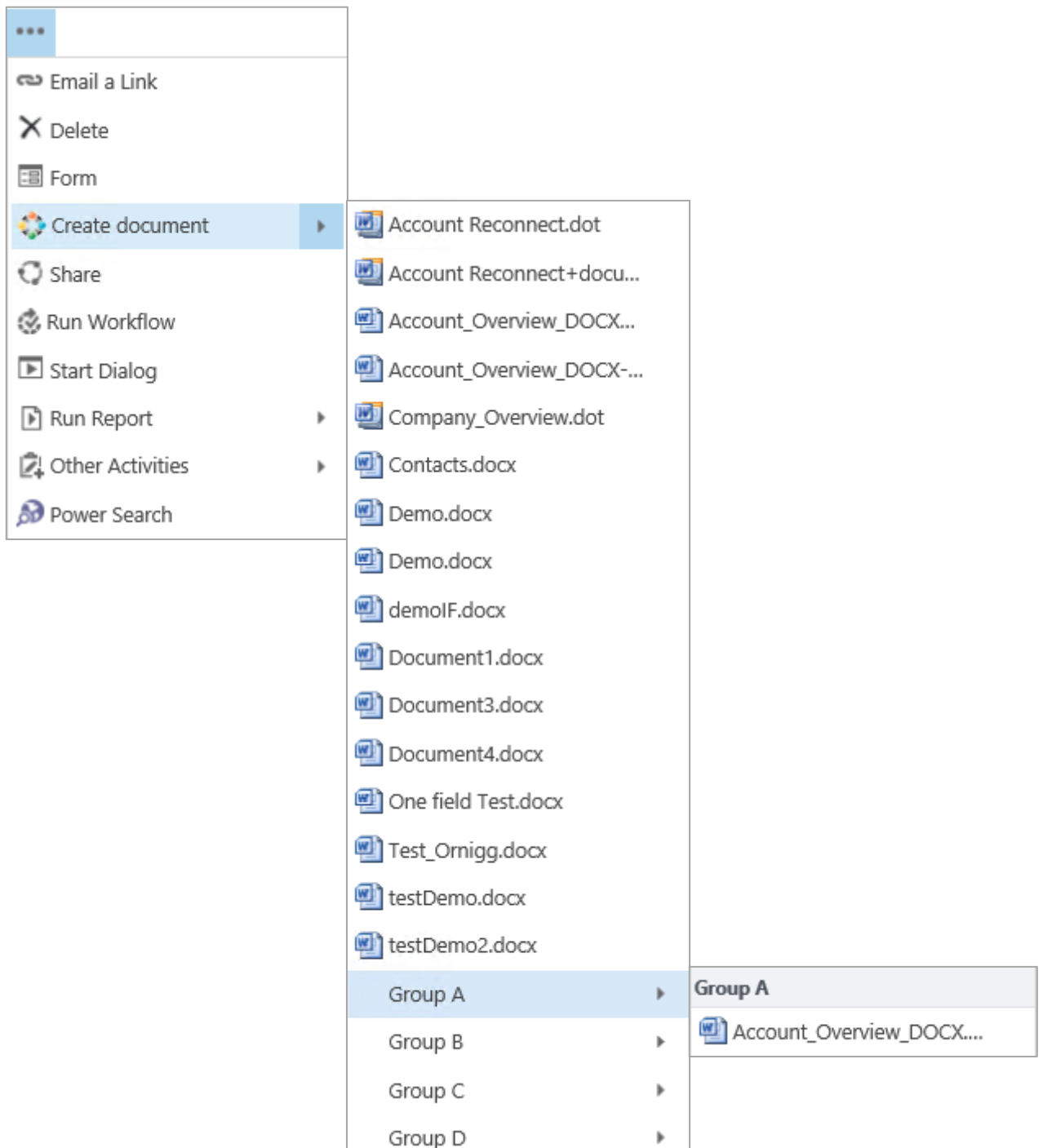


The bottom part of the button contains the new functionality and will drop down a list with all available templates for this entity.

If you have only checked the "Enable Template selection from Ribbon", the drop down list will show you all available templates, even if the templates are stored in different groups.



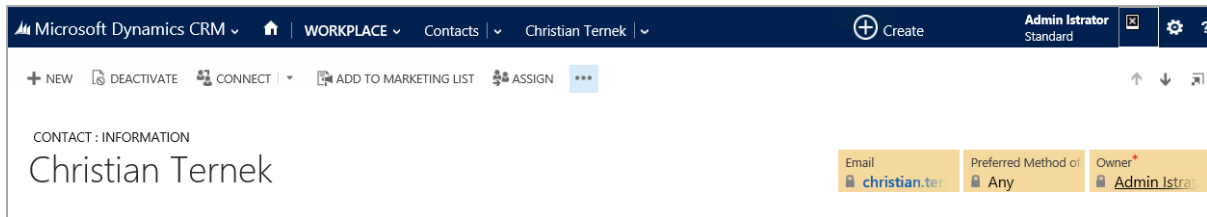
If the "Use hierarchical menus" is configured, also the groups including the templates will be displayed in a hierarchical way. The templates those are stored in the "General" group will be displayed on top of the list. See next screenshot:



After you have applied the settings, you'll see the "Create Document"-button on the selected entities on:

- The entity grid. By a click on the '...' -sign.

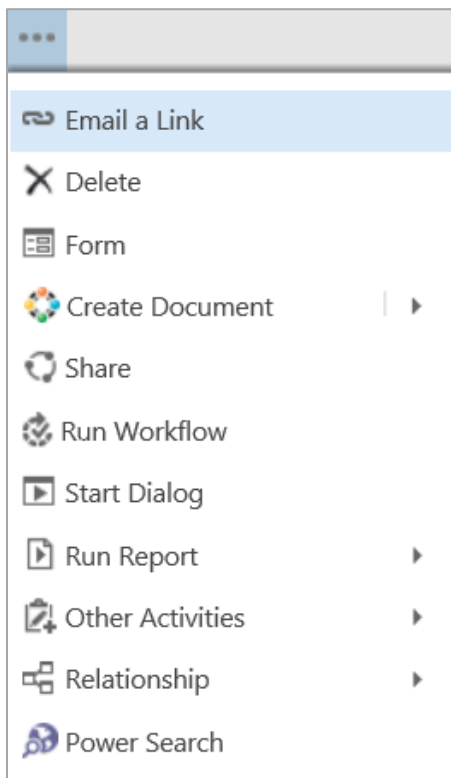
Here you can see the Ribbon of MS CRM 2013. E.g. entity contact:



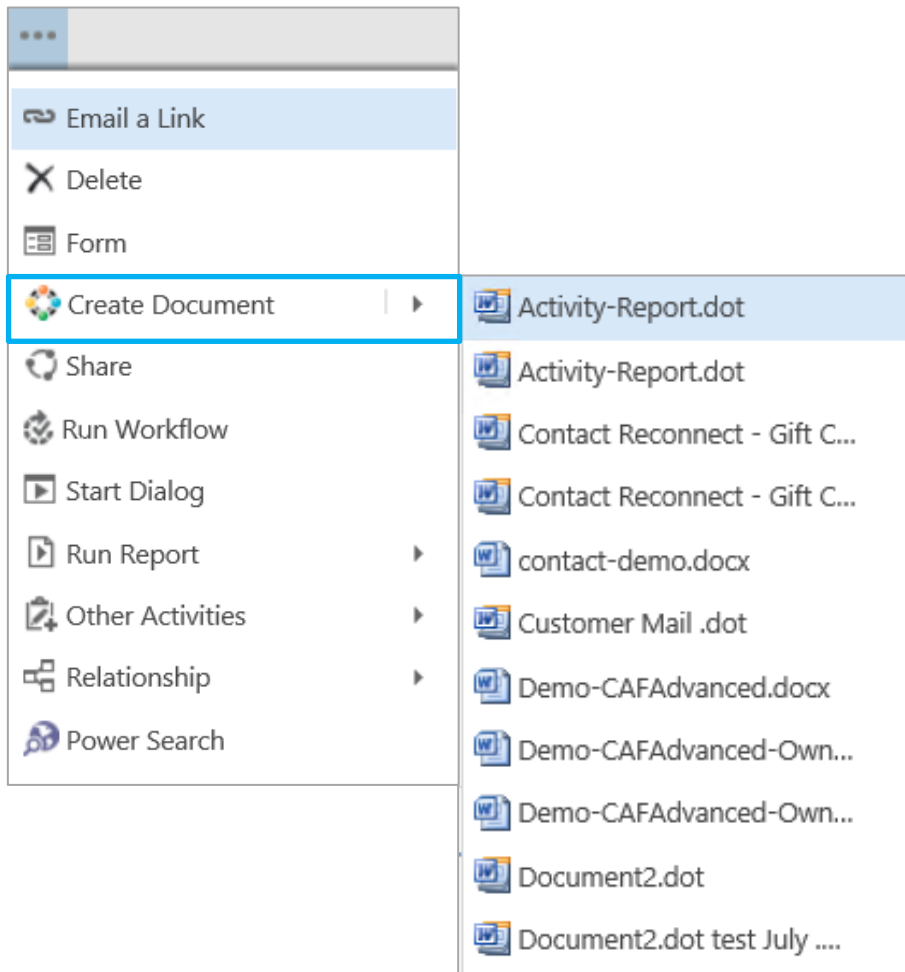
Click on the "..."-sign to see the "Create Document"-button:

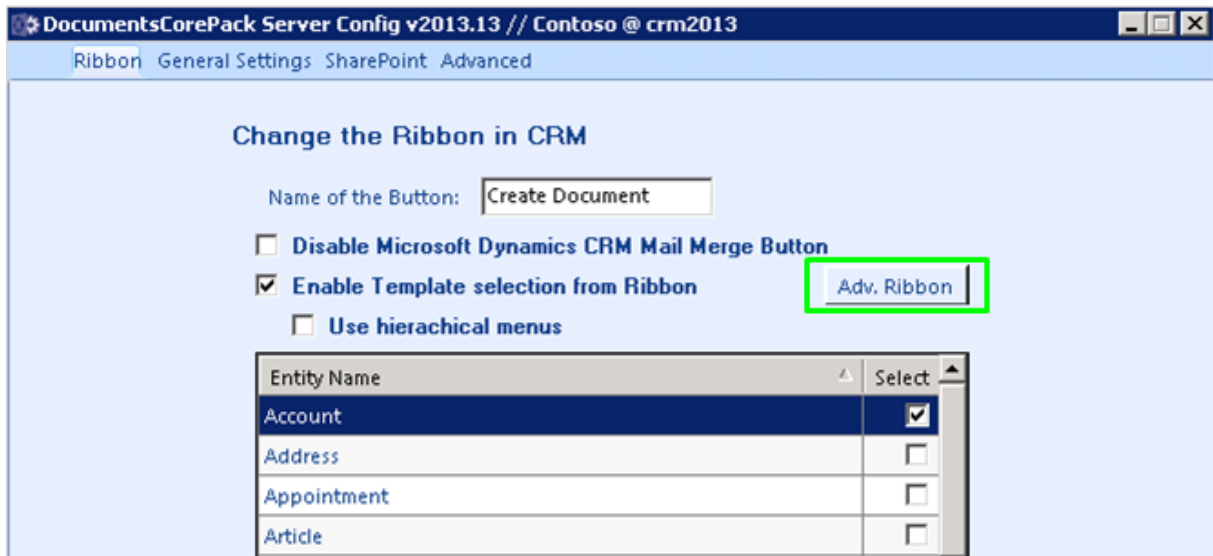


This action will open following window:

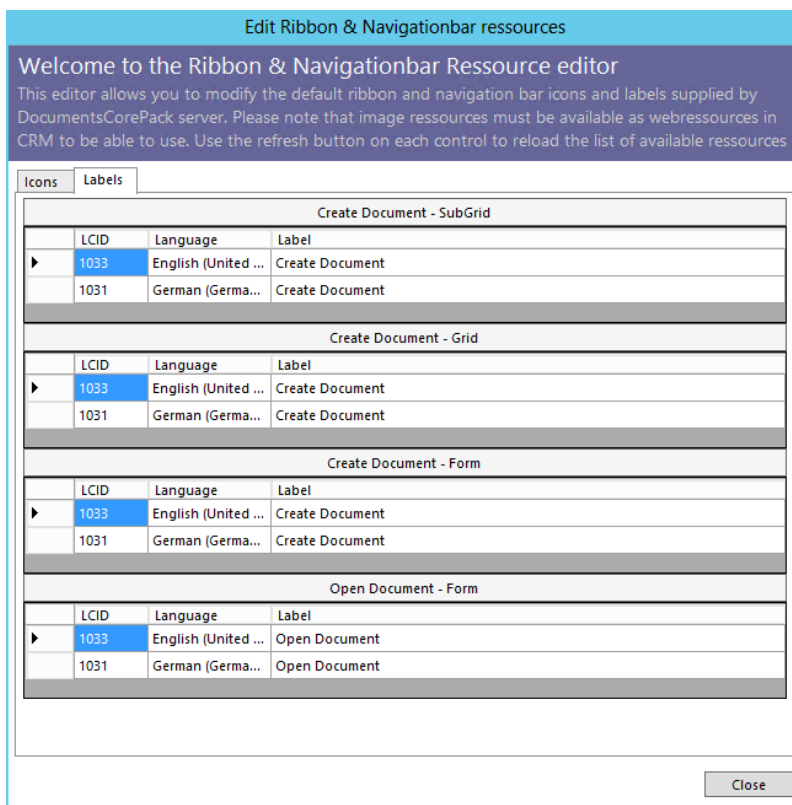


Click on the dropdown-button to get to the saved templates:

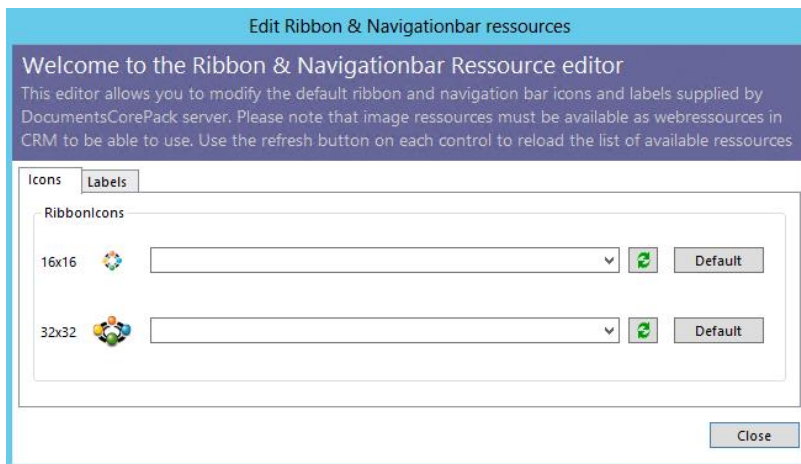




The "Adv. Ribbon" configuration will allow you to configure different names for the "CRM Mail Merge"-button, also for different languages. Furthermore, you are also being able to define specific icons for the buttons in CRM.

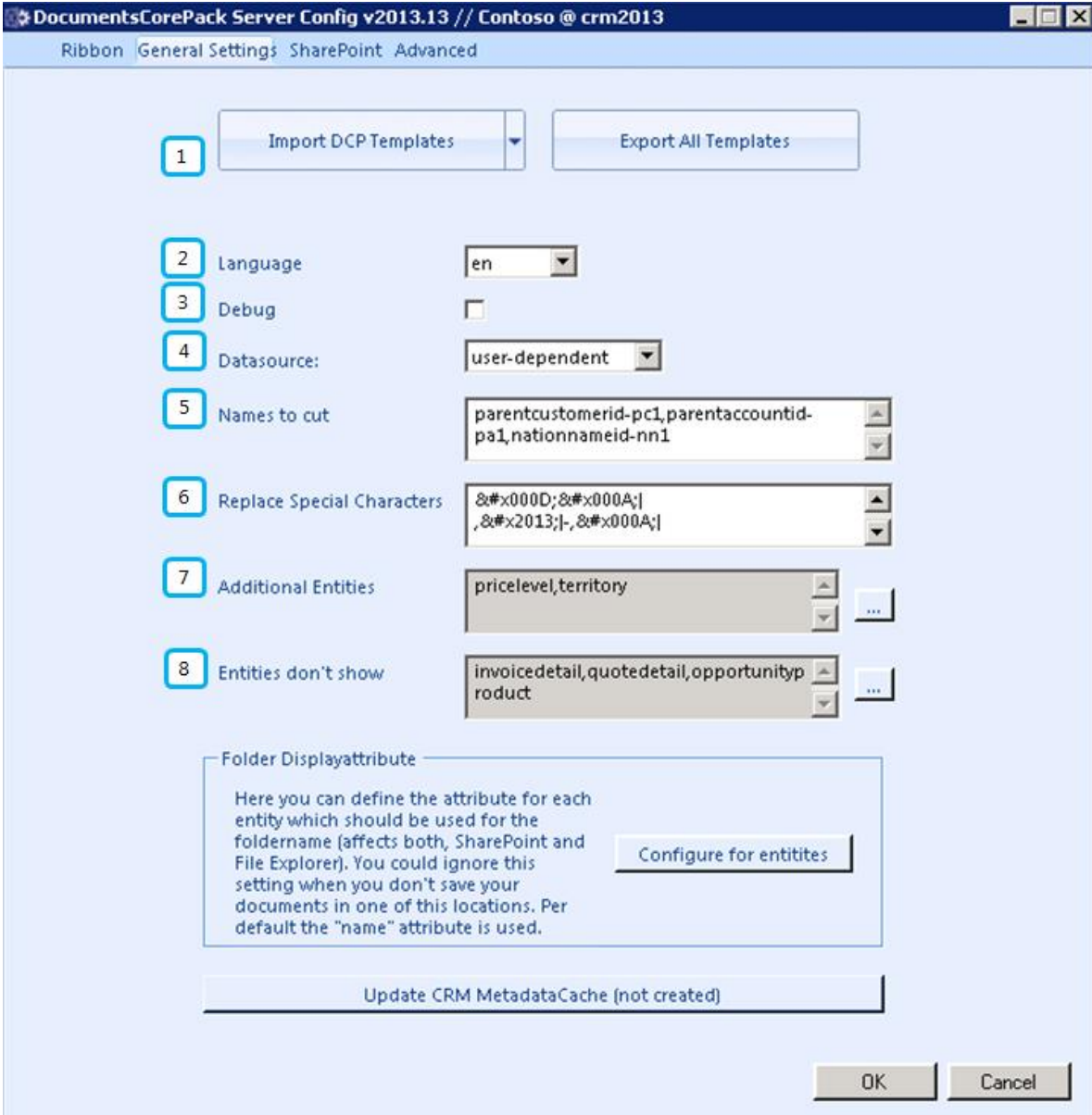


Within this dialog you can set the different labels for the different locations (Grid, Form...) of the "Create Document" button for the different languages.



The icons tab of this configuration window gives you the possibility to change the icons of the buttons. The icons are CRM web resource you can upload some by yourself with the standard CRM functionality.

## 9.2 The “General Settings”-tab



DocumentsCorePack Server Config v2013.13 // Contoso @ crm2013

Ribbon | General Settings | SharePoint | Advanced

1 Import DCP Templates | Export All Templates

2 Language: en

3 Debug:

4 Datasource: user-dependent

5 Names to cut: parentcustomerid-pc1,parentaccountid-pa1,nationnameid-nn1

6 Replace Special Characters: &#x00D;&#x00A;|, &#x2013;|-, &#x00A;|

7 Additional Entities: pricelevel,territory

8 Entities don't show: invoicedetail,quotedetail,opportunityproduct

Folder Displayattribute

Here you can define the attribute for each entity which should be used for the foldername (affects both, SharePoint and File Explorer). You could ignore this setting when you don't save your documents in one of this locations. Per default the "name" attribute is used.

Configure for entitties

Update CRM MetadataCache (not created)

OK Cancel

### 1. Import Templates

Please refer to chapter [13.2](#).

### 2. Language

You can choose the language from the dropdown-box. Languages are listed in language code (en for English, de for German). To add another language, please see [chapter 10](#).

### 3. Debug

Leave unchecked; this option is used by our support to simplify bug fixing.

### 4. Data Source

Here you can select the type of data source. This contains cached information from the CRM, which can be used with the DocumentsCorePack Client.



---

#### *5. Names to Cut*

This functionality is depreciated – for detailed information please read our DocumentsCorePack Client User Guide. (.dot). Details on [www.mscrm-addons.com](http://www.mscrm-addons.com).

#### *6. Replace Special Characters*

Treated special exceptions or certain coding problems with CRM

#### *7. Additional Entities*

DocumentsCorePack only shows customizable entities by default. If you want to use other entities for DocumentsCorePack , you have to define them in here.

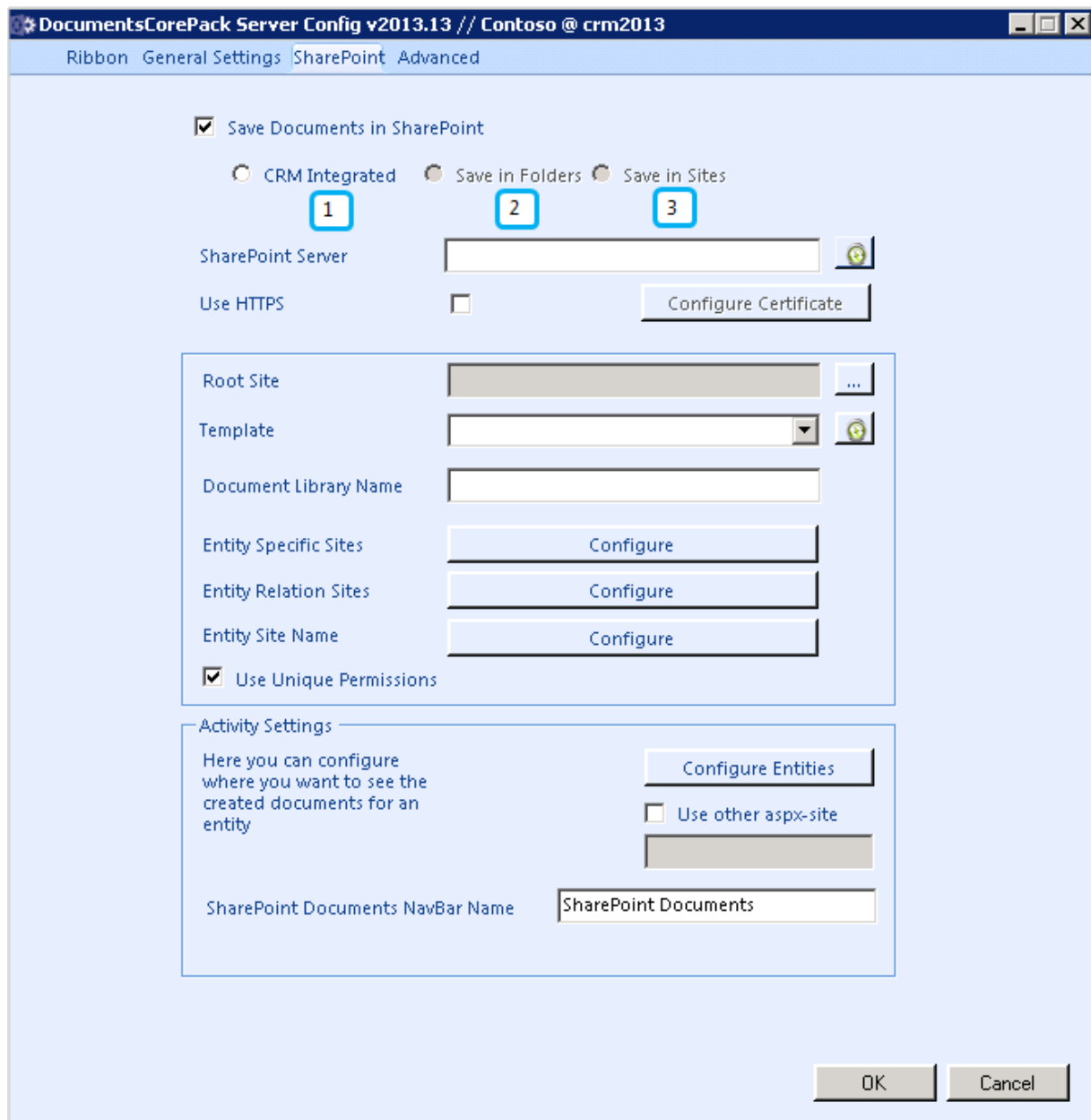
#### *8. Entities don't show*

Entities that are registered here will be hidden and are not useable/visible with/in DocumentsCorePack.

### 9.3 The "SharePoint"-Tab

The SharePoint Integration provided by DocumentsCorePack generates a separate folder in a site or a site for each record and gives you a structured and easy way to add files to your CRM-records.

*Because Microsoft has introduced his own SharePoint Integration with MS CRM 2011 the SharePoint Integration provided by DocumentsCorePack is deprecated and will not be further developed, but can be used by existing customers also in MS CRM 2013. The DocumentsCorePack Client supports both SharePoint Integrations.*

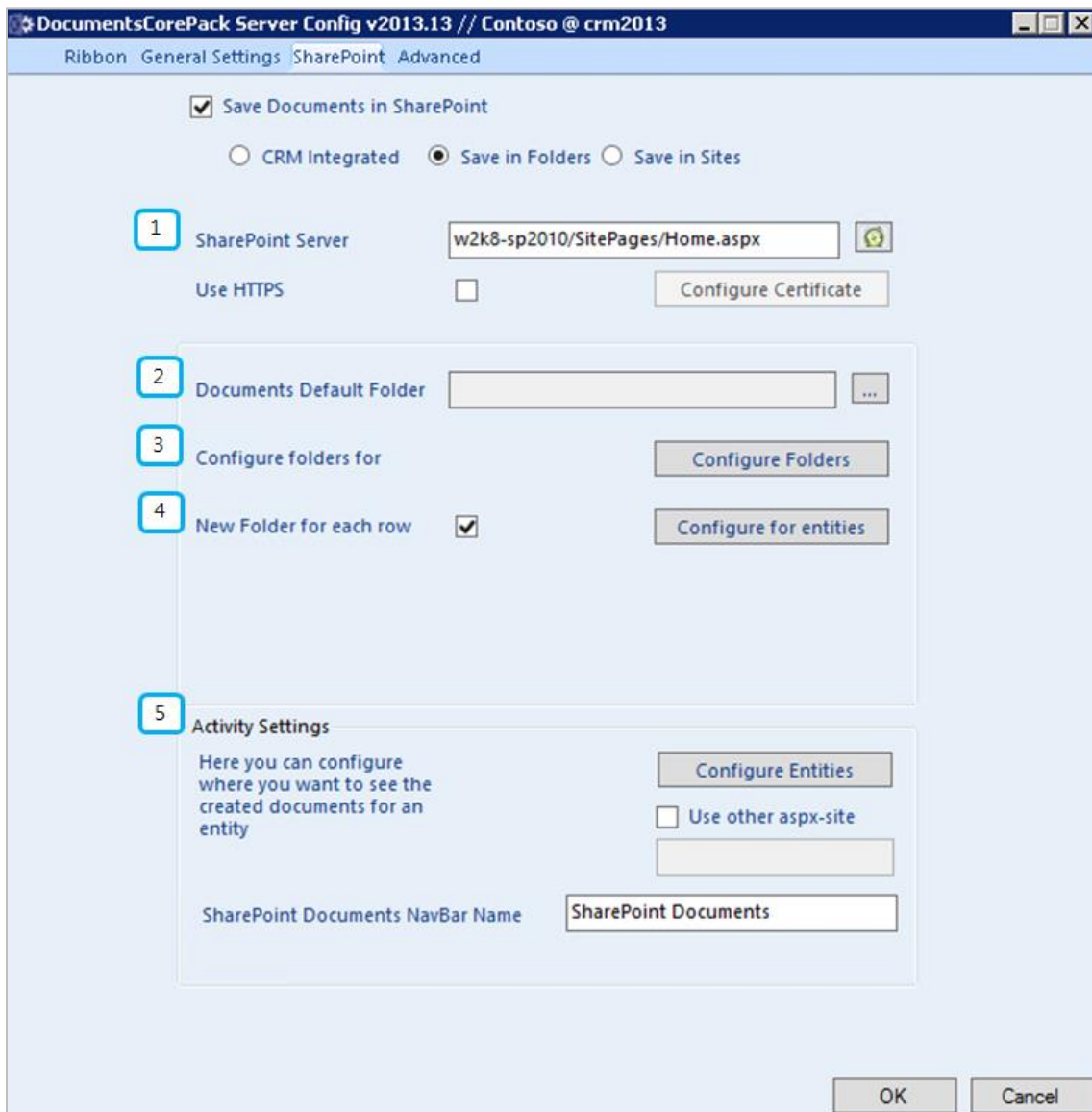


You can decide between three SharePoint integration options:

1. CRM Integrated: You have to configure the SharePoint integration within CRM to use this integration. When enabled, the documents generated via the DocumentsCorePack Client will be saved in the CRM specified SharePoint location for each record.
2. Save in folders: A new **folder** will be created for each record.
3. Save in Sites: A new **site** will be created for each record.

### 9.3.1 Save documents in SharePoint – Save in Folders Settings

Here it is possible to define how the documents should be saved to the SharePoint Folders. You have to select "Save in Folders".




DocumentsCorePack Server Config v2013.13 // Contoso @ crm2013


Ribbon General Settings SharePoint Advanced

Save Documents in SharePoint

CRM Integrated  Save in Folders  Save in Sites

1 SharePoint Server  

Use HTTPS

2 Documents Default Folder  

3 Configure folders for

4 New Folder for each row

5 Activity Settings

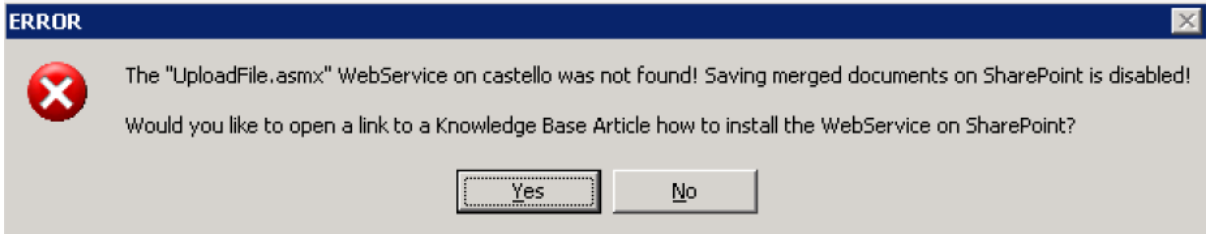
Here you can configure where you want to see the created documents for an entity

Use other aspx-site

SharePoint Documents NavBar Name

### SharePoint Server

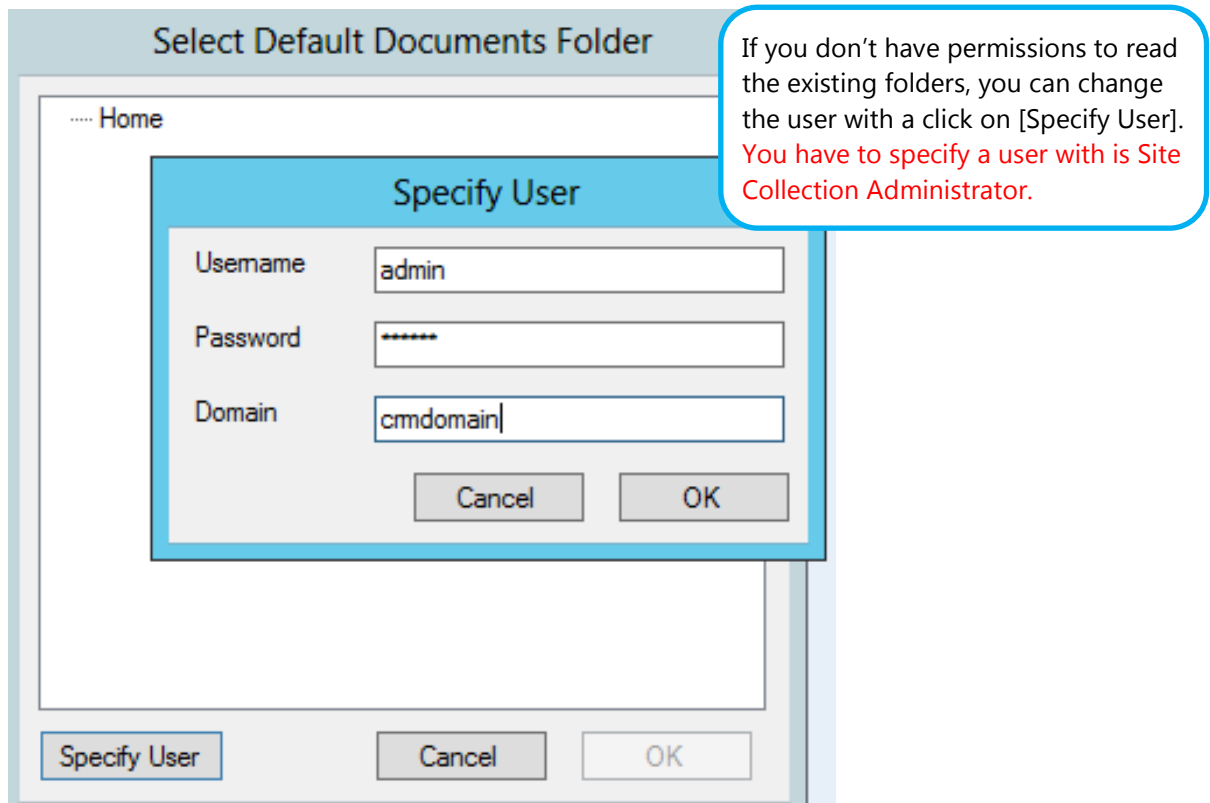
Please enter the URL to the SharePoint Server. With a click on the refresh button you could check if the WebService is installed. Notice: The DocumentsCorePack – services have to be installed on the mSharePoint to be activated. You'll get following notification if the necessary services could not be found:



In this case you'll have to install the DCP SharePoint services on the SharePoint - see Knowledge Base-article: <http://support.mscrm-addons.com/default.aspx?KB=10272>

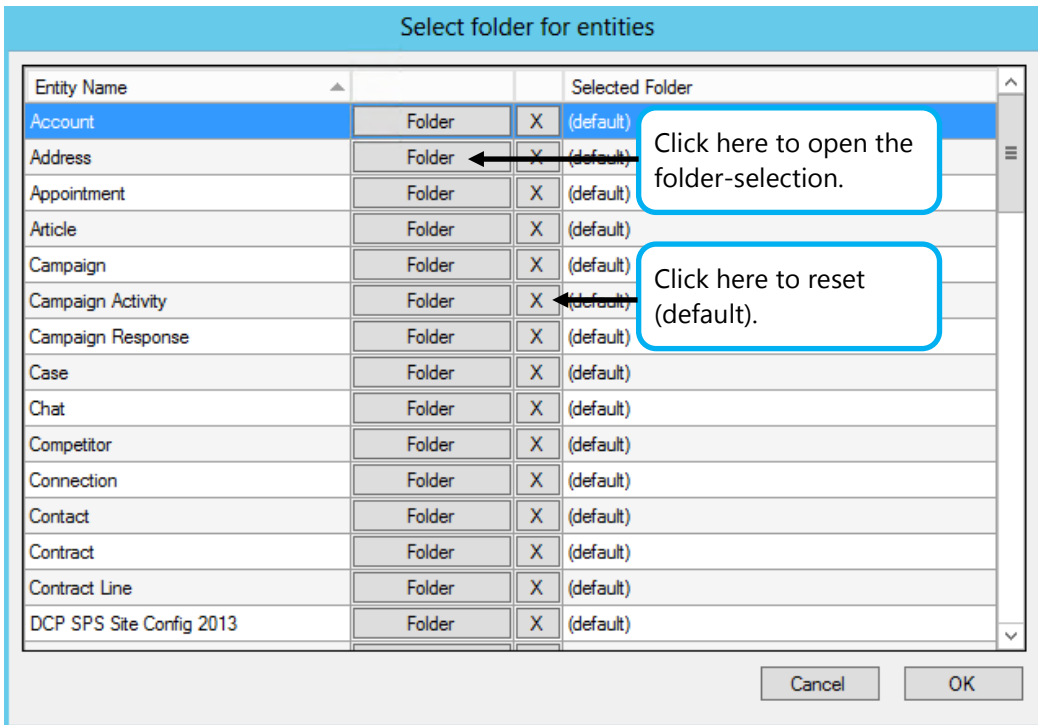
### 2) Documents Default Folder

Specifies the default folder for documents saved with DocumentsCorePack. You can choose the folder with a click on [...].

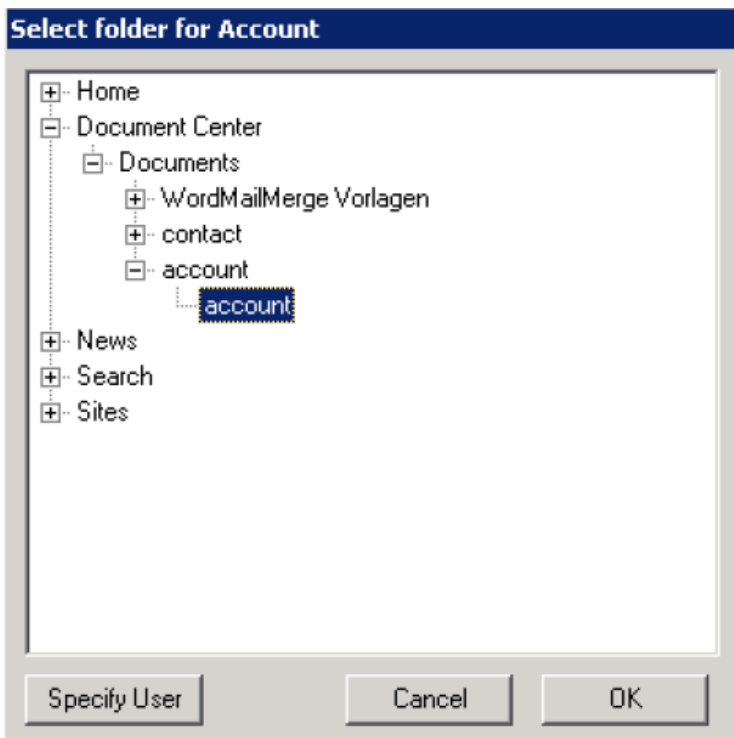


### 3) Configure Folder for entities

Here you can specify a specific folder for each entity.



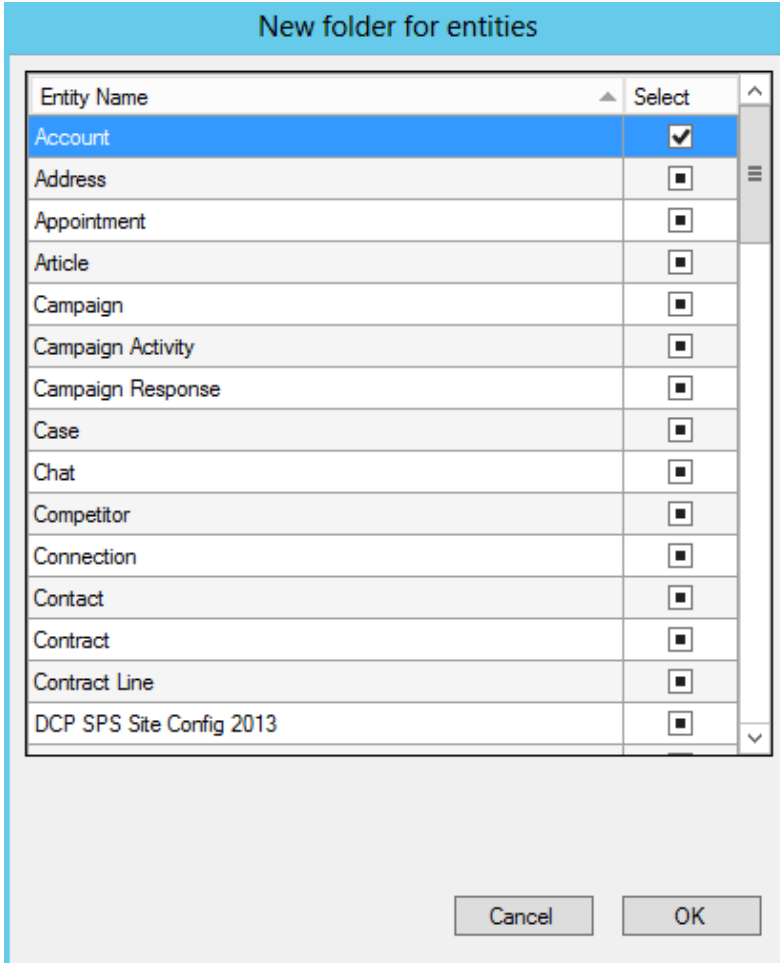
Click on [Folder] to open the selection (e.g. account).



All documents for the entity account will be saved to this folder afterwards. Set this option to (default) to use the documents default folder.

#### 4) 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 on (default) with the checkbox. To specify this option for each entity, click on [Configure for entities].



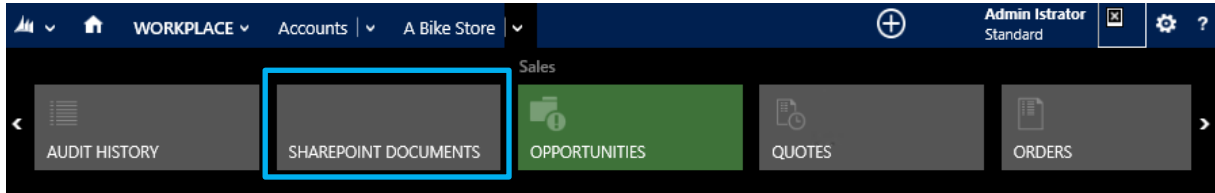
Entity Name	Select
Account	<input checked="" type="checkbox"/>
Address	<input type="checkbox"/>
Appointment	<input type="checkbox"/>
Article	<input type="checkbox"/>
Campaign	<input type="checkbox"/>
Campaign Activity	<input type="checkbox"/>
Campaign Response	<input type="checkbox"/>
Case	<input type="checkbox"/>
Chat	<input type="checkbox"/>
Competitor	<input type="checkbox"/>
Connection	<input type="checkbox"/>
Contact	<input type="checkbox"/>
Contract	<input type="checkbox"/>
Contract Line	<input type="checkbox"/>
DCP SPS Site Config 2013	<input type="checkbox"/>

Options:

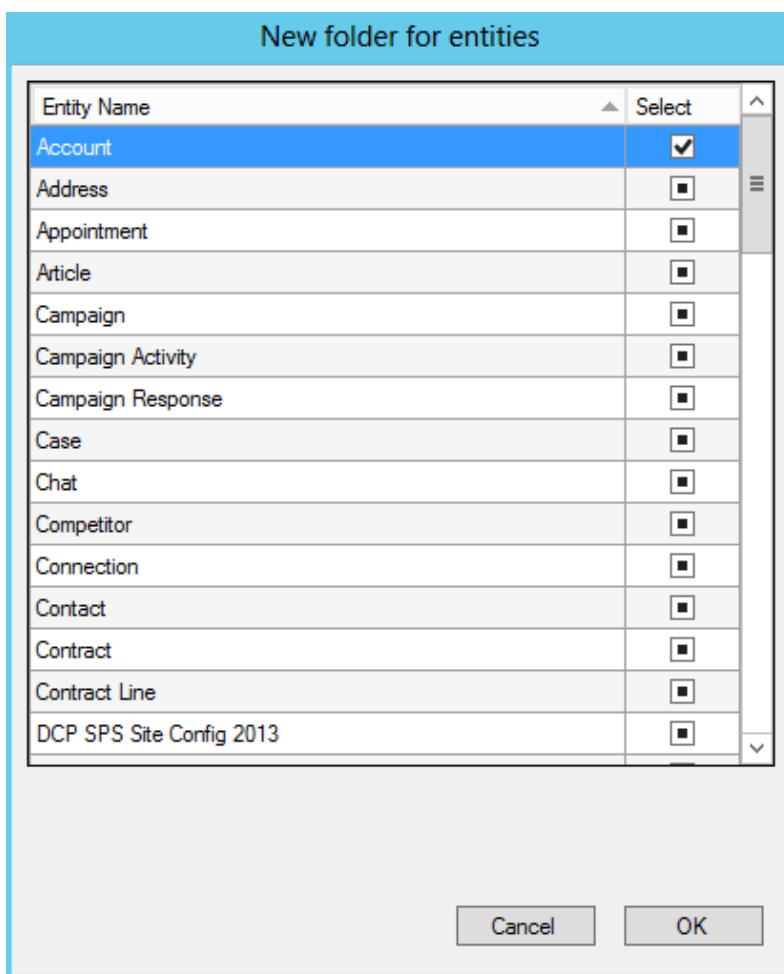
- Checked: A new folder will be created for each record.
- Unchecked: Documents saved for this entity will be saved to the folder specified in no.: 2 and 3 (see above).

### 5) Visualization options

Here it's possible to choose where you want to see the created/saved documents. The documents will be shown within the entity details of the entities. A menu option will appear in the ribbon.



You can specify the entities where this option should appear by clicking on [Configure for entities].



By default, the view "AllItems.aspx" is used to view your SharePoint documents. Use the "Use other aspx-site" setting to change the default view.

### Activity Settings

Here you can configure where you want to see the created documents for an entity

**Configure Entities**

**Use other aspx-site**

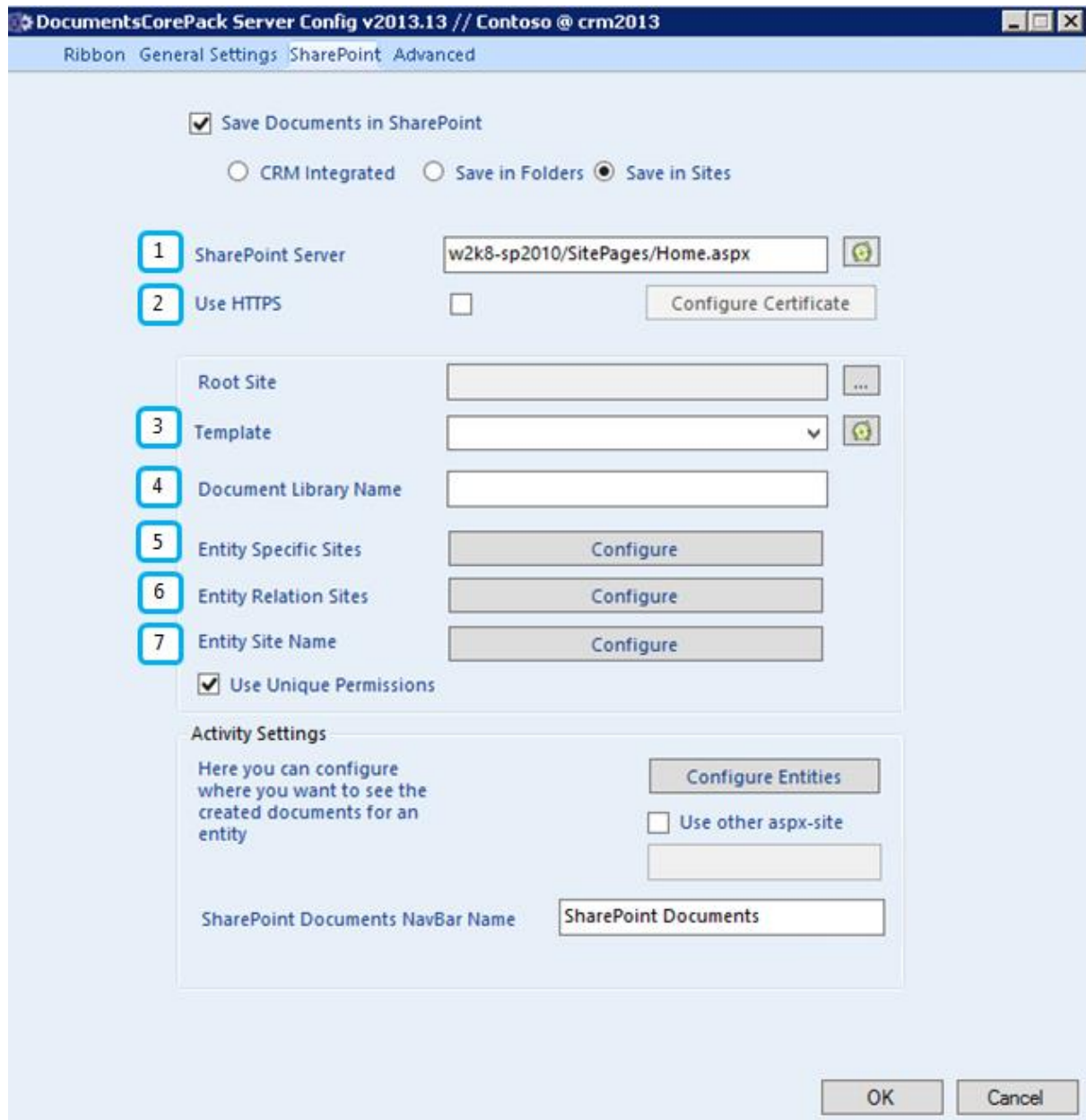
**SharePoint Documents NavBar Name**

You can also specify the name of the navigation bar within CRM with the "SharePoint Documents NavBar Name" setting.



### 9.3.2 Save documents in SharePoint – Save in Sites Settings

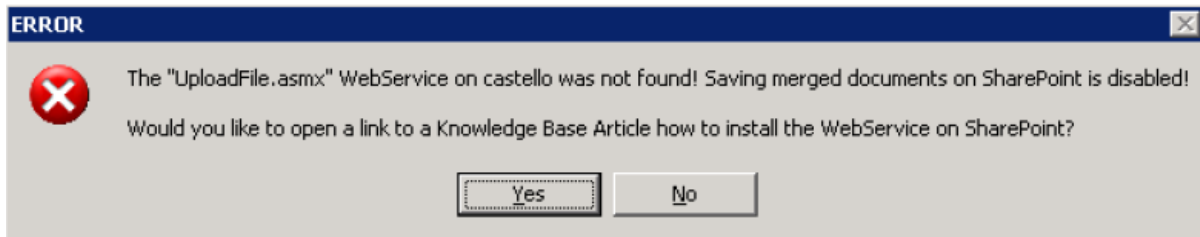
Here it's possible to define how the documents should be saved to the SharePoint Sites. You have to select "Save in Sites".



### 1) SharePoint Server

Please enter the URL to the SharePoint Server. With a click on the refresh button you could check if the WebService is installed.

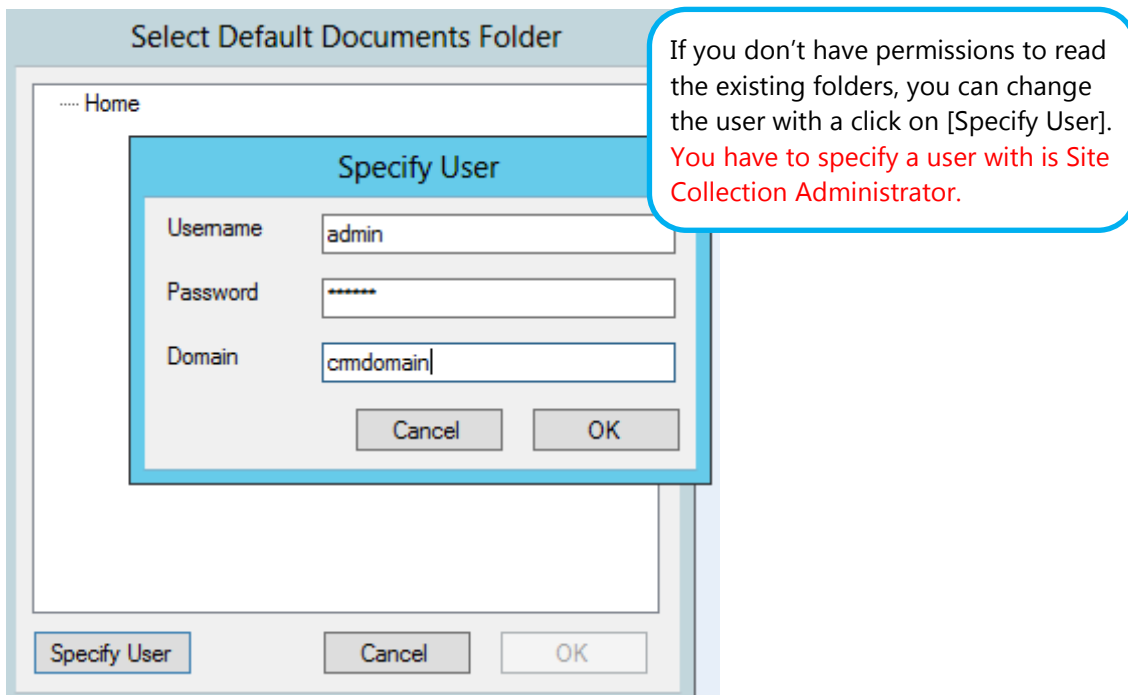
**Notice:** The DocumentsCorePack – services have to be installed on the SharePoint to activate. You will get the following notification if the necessary services could not be found:



In this case, you'll have to install the DCP SharePoint services on the SharePoint -> see Knowledge Base-article: <http://support.mscrm-addons.com/default.aspx?KB=10272>

### 2) Root Site

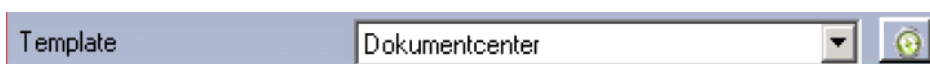
The Root Site specifies the default site for documents saved with DocumentsCorePack. You can choose the site with a click on [...].



You can select any sub site or also the SharePoint root.

### 3) SharePoint Template

First time round you will have to hit the refresh button to read all the SharePoint site templates. Then select a SharePoint template which must include **at least one** Document Library.



#### 4) Document Library Name

You have to enter the name of a Document Library which exists in the SharePoint template. You selected the template in the previous step! Please verify that the name is entered correctly!

Document Library Name	Dokumente
-----------------------	-----------

#### 5) Entity Specific Sites

Here you can configure a specific site for each entity where the sub sites for each record will be generated. You must select a site on SharePoint and a SharePoint template which must include at least one Document Library. The name of the Document Library must exist in the template you have selected.

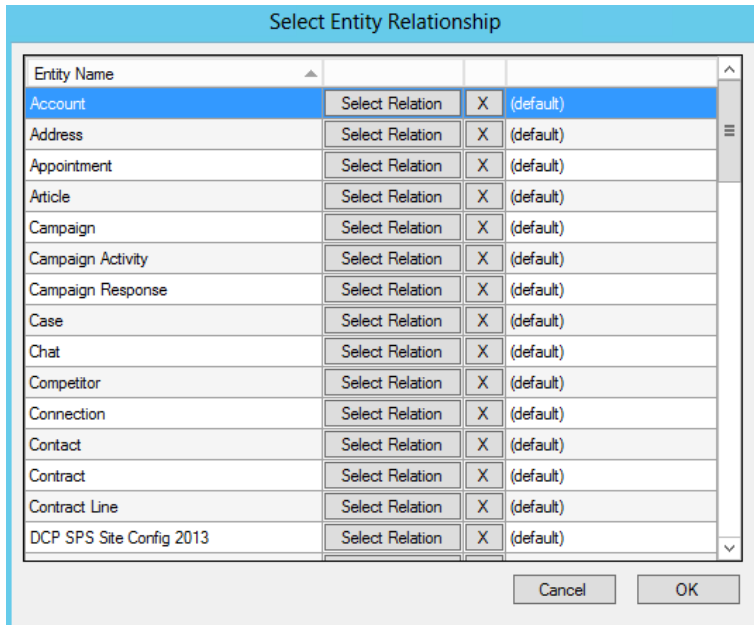
Select Entity Specific Sites

Entity Name			Custom Configuration
Account	View/Configure	X	<input type="checkbox"/>
Address	View/Configure	X	<input type="checkbox"/>
Appointment	View/Configure	X	<input type="checkbox"/>
Article	View/Configure	X	<input type="checkbox"/>
Campaign	View/Configure	X	<input type="checkbox"/>
Campaign Activity	View/Configure	X	<input type="checkbox"/>
Campaign Response	View/Configure	X	<input type="checkbox"/>
Case	View/Configure	X	<input type="checkbox"/>
Chat	View/Configure	X	<input type="checkbox"/>
Competitor	View/Configure	X	<input type="checkbox"/>
Connection	View/Configure	X	<input type="checkbox"/>
Contact	View/Configure	X	<input type="checkbox"/>
Contract	View/Configure	X	<input type="checkbox"/>
Contract Line	View/Configure	X	<input type="checkbox"/>
DCP SPS Site Config 2013	View/Configure	X	<input type="checkbox"/>

Cancel
OK

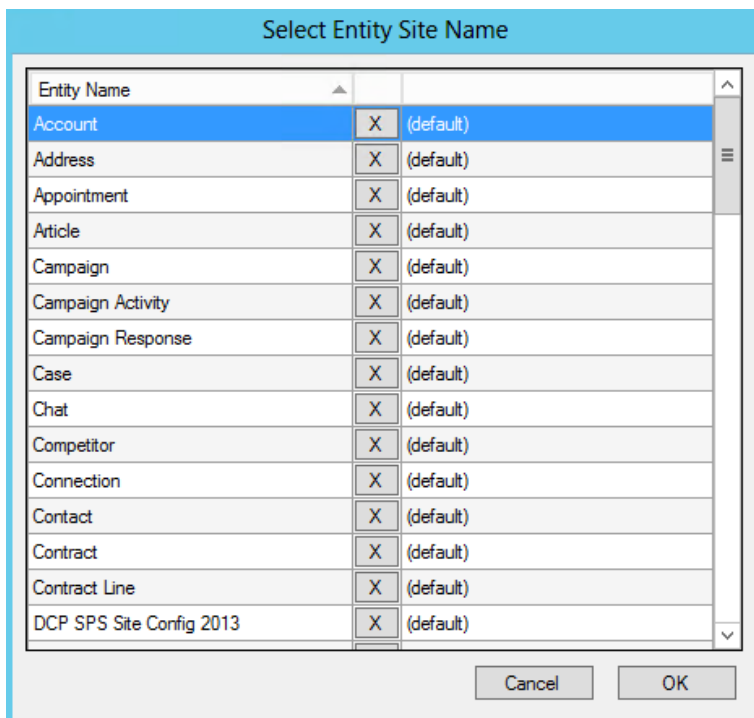
### 6) Entity Relation Sites

You can select a relationship to another entity in which the sites will be generated as sub sites (e.g. If all contact sites should be created under the parent customer (account), you can select the relation for a contact to the account which is the parentcustomerid. Every contact site will be created under the related account site.)

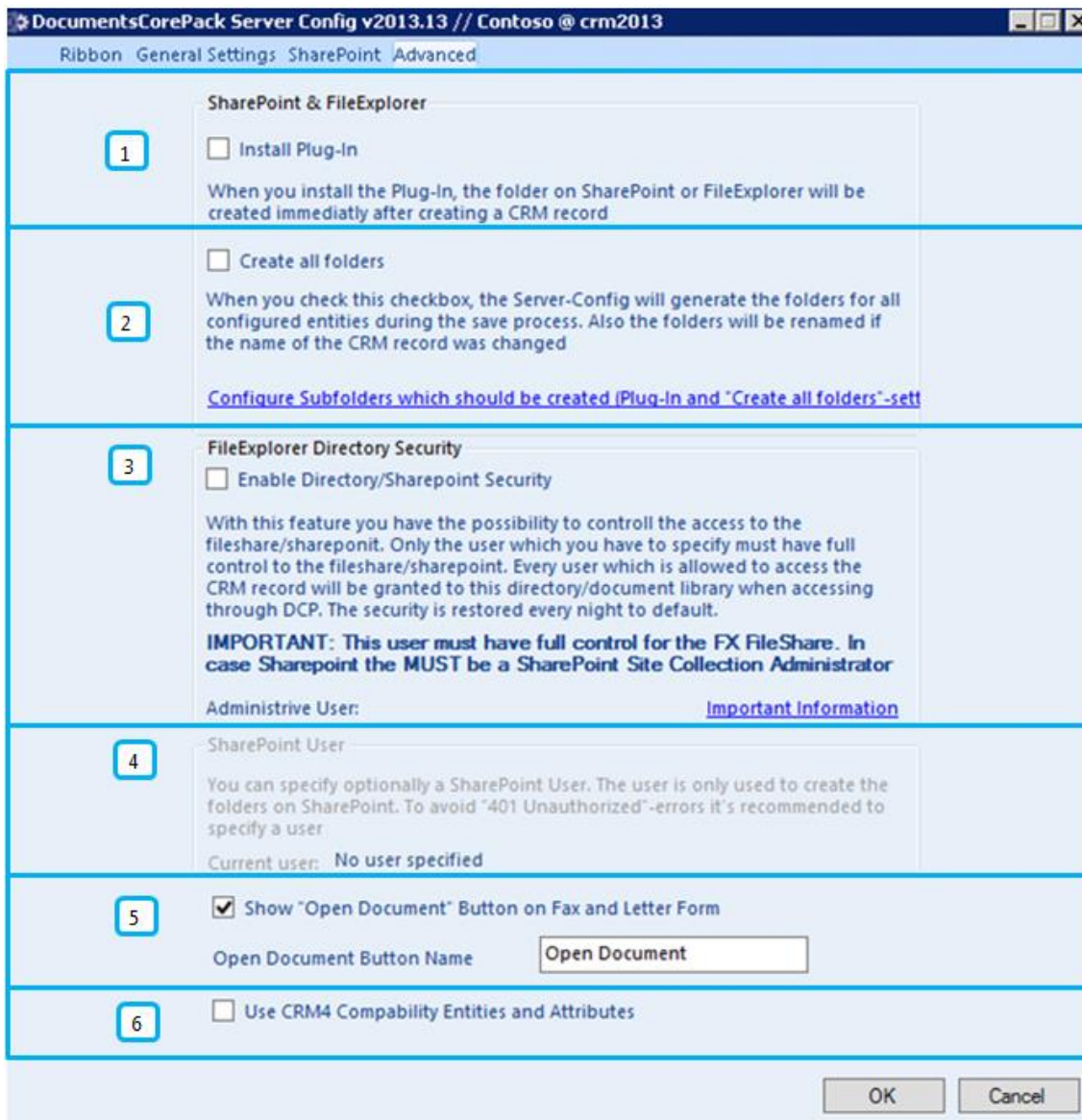


### 7) Entity Site Name

For each entity you could select a "display" name. This name will be used for the site name of each entity (e.g. When you've configured in the relation settings that the contacts will be saved under the related account, a sub site under the account site will be generated with the schema name. In this example ("contact") the contact sites will be created under this site. If you don't like this name, you could change it in the settings).



## 9.4 The "Advanced"-Tab



DocumentsCorePack Server Config v2013.13 // Contoso @ crm2013

Ribbon General Settings SharePoint Advanced

**1**  Install Plug-In  
When you install the Plug-In, the folder on SharePoint or FileExplorer will be created immediatly after creating a CRM record

**2**  Create all folders  
When you check this checkbox, the Server-Config will generate the folders for all configured entities during the save process. Also the folders will be renamed if the name of the CRM record was changed  
[Configure Subfolders which should be created \(Plug-In and "Create all folders"-sett](#)

**3**  FileExplorer Directory Security  
 Enable Directory/Sharepoint Security  
With this feature you have the possibility to control the access to the fileshare/sharepoint. Only the user which you have to specify must have full control to the fileshare/sharepoint. Every user which is allowed to access the CRM record will be granted to this directory/document library when accessing through DCP. The security is restored every night to default.  
**IMPORTANT: This user must have full control for the FX FileShare. In case Sharepoint the MUST be a SharePoint Site Collection Administrator**  
Administrive User: [Important Information](#)

**4**  SharePoint User  
You can specify optionally a SharePoint User. The user is only used to create the folders on SharePoint. To avoid "401 Unauthorized"-errors it's recommended to specify a user  
Current user: No user specified

**5**  Show "Open Document" Button on Fax and Letter Form  
Open Document Button Name

**6**  Use CRM4 Compability Entities and Attributes

OK Cancel

### 1) Install Plug-In

When you install the plug-in, the folder on SharePoint or File Explorer will be created immediately after creating a CRM record.

### 2) Create all folders

When you check this checkbox, the Server-Config. will generate the folders for all configured entities during the save process. Also, the folders will be renamed if the name of the CRM record was changed.

### 3) Enable Directory Security

With this feature you have the possibility to control the access to the file share. Only the user which you have to specify must have full control to the file share. Every user which is allowed to access the CRM record will be granted to this directory when accessing through DCP. The security is restored to default every night.

#### 4) SharePoint User

You can optionally specify a SharePoint user. The user is only used to create the folders on SharePoint. To avoid "401 Unauthorized" –errors it's recommended specifying a user.

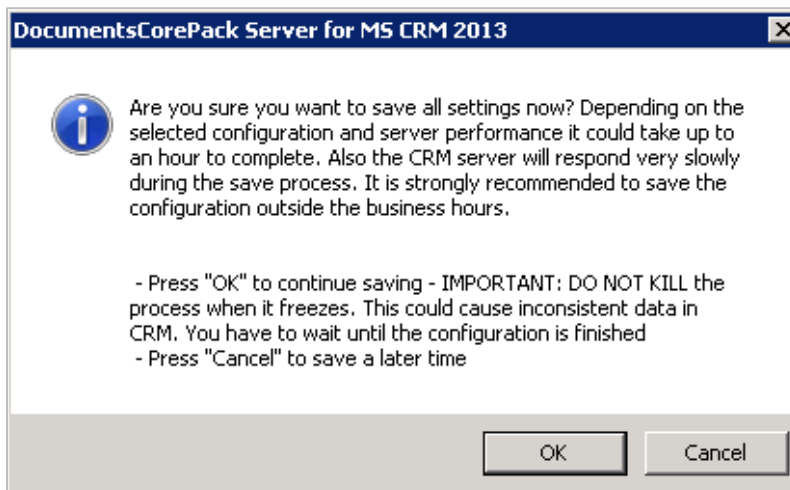
#### 5) Show Open Document Button

When you've configured the File Explorer- or SharePoint-integration, you can specify here if you want to see an "Open Document" button on the fax and letter activities. With that button you can open the associated document if it was generated via the DocumentsCorePack Client. You could also configure the name of the button. When you enable File Explorer or SharePoint, this setting is activated by default.

#### 6) Use CRM 4.0 Compatibility

The CRM4 Compatibility mode is necessary when you migrated your organization from CRM 4.0 to CRM 2011 and you used File Explorer or SharePoint Integration. For the fax and letter activity the document links were saved in an attribute. When the compatibility mode is enabled, the old CRM 4.0 attributes will be used. Otherwise, the new DCP 2011 attributes will be used.

Whenever users save the settings following window appears:

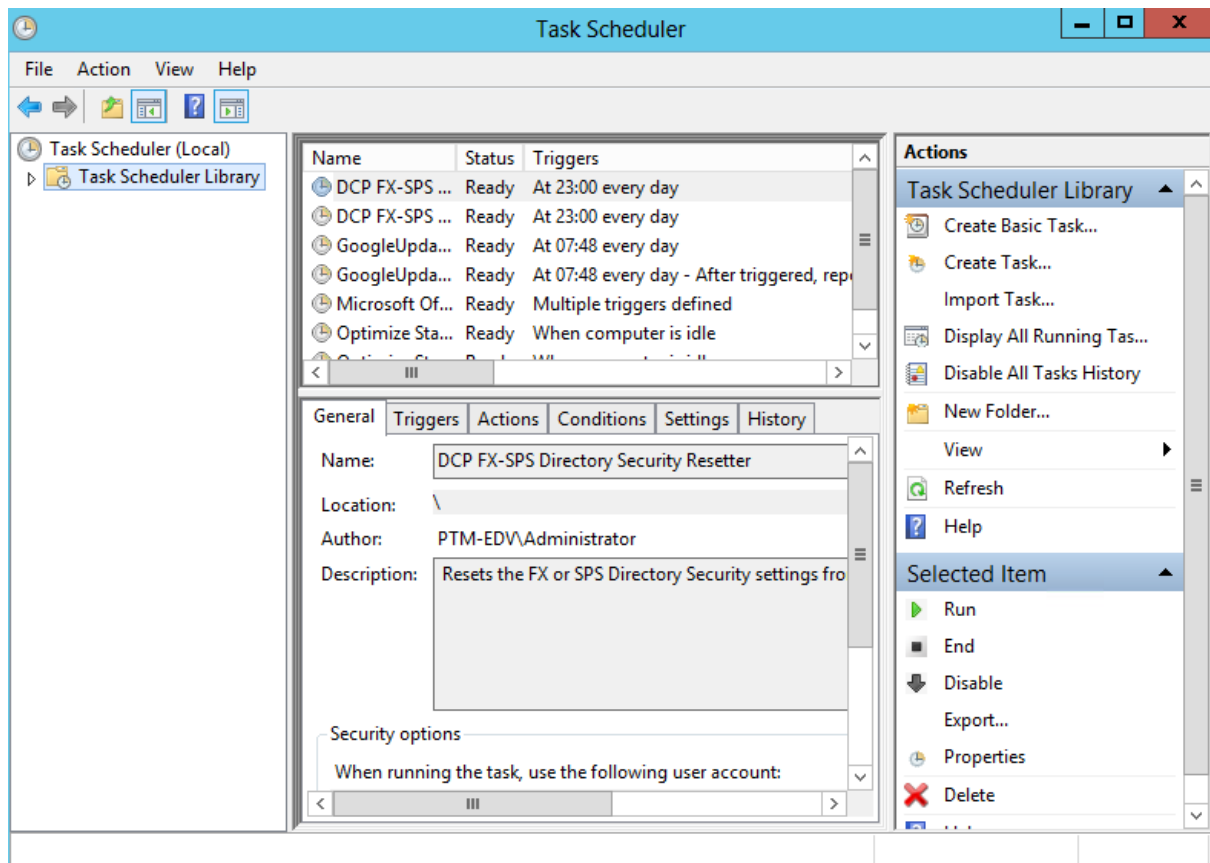


## 9.5 Additional steps for DocumentsCorePack Directory Security

With the Directory Security feature of DocumentsCorePack for MS CRM 2013 you can prevent users from seeing the files from CRM records which are not accessible for them. Users will not be able to navigate to the associated directory within the file share or SharePoint because DocumentsCorePack will overtake the security for you. In other words: When a user is not able to see the CRM record, he/she will also not be able to see the documents.

Furthermore, you have to do additional steps for the Directory Security. Each time a user accesses the documents through DocumentsCorePack, the user will be granted for this specific directory. As it's possible that user privileges are changed, the user will not have permissions to see the CRM record anymore, but the permissions are already granted.

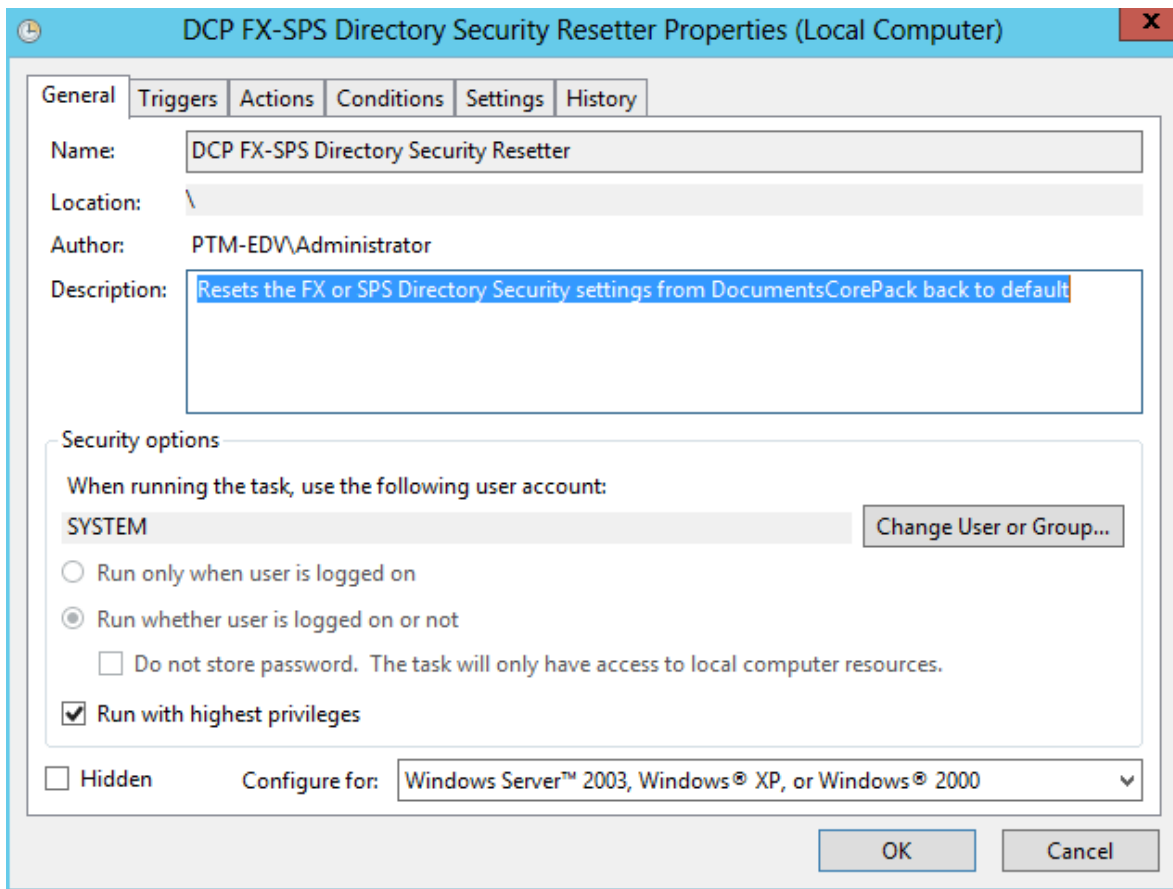
That's the reason why DocumentsCorePack resets the permission every night at 11pm (server time). For this, you have to specify a user under which the task should run. You have to do this manually. Please open the Windows Task Scheduler



You'll see two tasks, "DCP FX-SPS Directory Security Resetter" which is for FileExplorer and "DCP FX-SPS Directory Security Resetter sps" which resets the SharePoint Directory Security. Per default, the tasks are running under the SYSTEM account that has not enough privileges to connect to CRM.

You need to specify a user who is able to read all organizations. To do so, double-click on the tasks and click on "Change User or Group". Specify a user who is able to connect to CRM.

See next screenshot:



Now the directory security will be reset every night to the default permissions.



## 10 How to install DocumentsCorePack in an IFD/Claims-based environment

In this chapter we will walk you through the required steps to install DocumentsCorePack in an IFD/Claims-based-environment.

You need to have the following downloads present to successfully setup the addon:

- IFD-Tool -> [Download Link](#) you need to have a login on our web site
- For installing DocumentsCorePack you need at least version 5.18 from our [Download Section](#)

Before you start installing, MS CRM is required to be working correctly in IFD/Claims-Mode, including your ADFS, which should be installed correctly and configured to work with MS CRM.

More details on how to configure MSCRM for IFD/Claims can be found in the Microsoft Guide "Configuring Claims-based Authentication for Microsoft Dynamics CRM 2011" [Download](#)

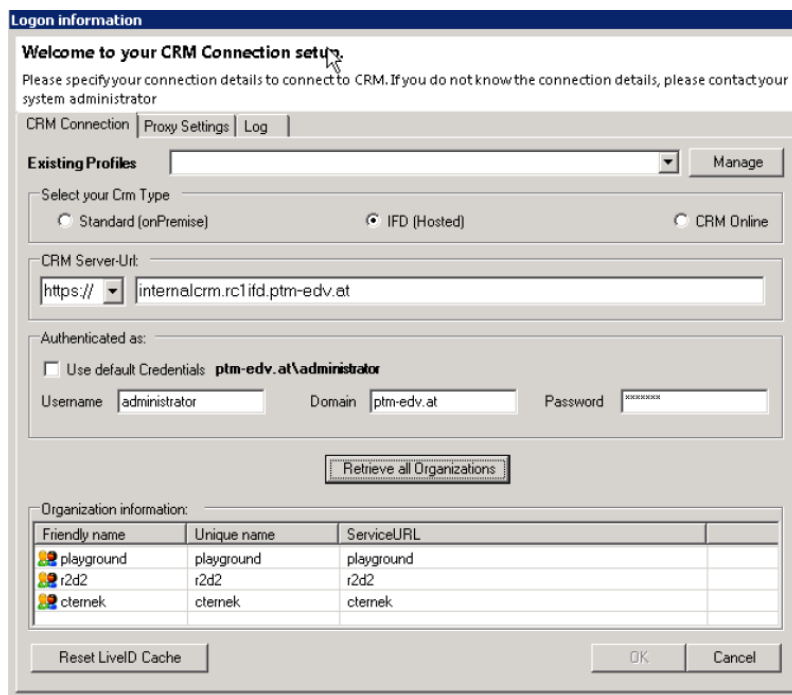
The following system configuration is the basis for our guide. Your setup will differ in these URLs, make sure you are replacing the URLs with your own URLs when following the guide.

- Internal Url used to access Microsoft Dynamics CRM:  
https://internalcrm.rc1ifd.ptm-edv.at
- External Url used to access Microsoft Dynamics CRM:  
https://[orgname].rc1ifd.ptm-edv.at
- AD FS Server: https://win2008domain.ptm-edv.at
- The Addon itself also requires a dns name:  
https://documentscorepackserver.rc1ifd.ptm-edv.at

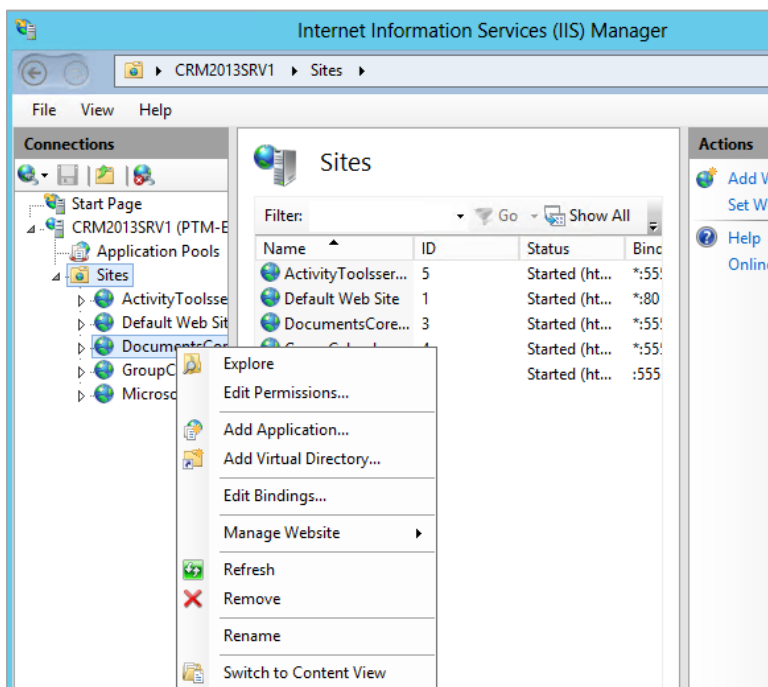
### Basic installation/configuration of our addon:

**1.** Install the addon on the CRM Server.

**2.** You will be asked for the Logon Informations. Fill in the internal IFD name of your CRM. In our case it is internalcrm.rc1ifd.ptm-edv.at select the organization on which you want to install the addon and click on OK.

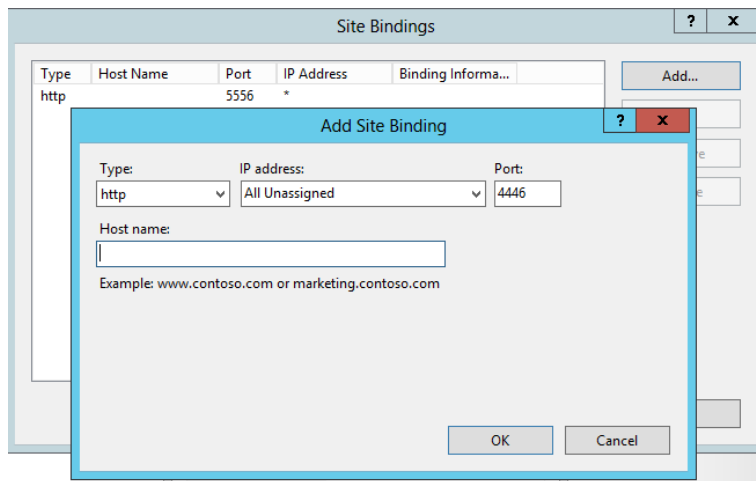


3. After the installation is finished you have to open the IIS ( inetmgr.exe ) and go to the Sites -> the Addon WebSite. Right click the DocumentsCorePackserver - WebSite and select "Edit Bindings...".



On the bindings click on "Add..." and select the type "https" in the "Add Site Binding". You also have to specify the port. In our example we use 4446.

See next screenshot:



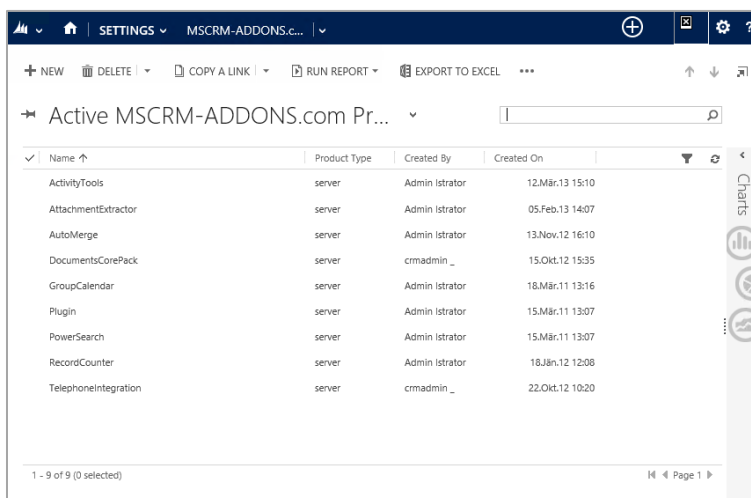
With that, we made the web site available for https. Click on [OK]

4. Reselect the addon website and double click on the "Authentication" item on the right side details pane. Verify that the options "Anonymous" and "ASP.Net Impersonation" settings are enabled.

5. The addon Url needs to be added to your DNS Server. Your DNS-servers have to resolve the documentscorepackserver.[your-domain] names correctly. That means that they should resolve it with the same IP address as your CRM Server has. If you have an external DNS, make sure that both, the external and the internal DNS, are able to resolve the URL.

6. Extract the IFD-Tool (zip-file) that you downloaded before and execute the IFDSetupWizard.exe. Follow the steps in the IFD Setup carefully.

7. Open your CRM in the Internet Explorer and go to "Settings" -> "MSCRMADDONS.com Products" -> Open the Addon -> in the MSCRM-ADDONS.com Products from select the MSCRM-ADDONS.com Settingskeys and search for the "WebApplicationPort" entry.



8. Open the WebApplicationPort and replace the existing KeyValue with the following:  
[httpsPort][httpPort][claimsbased][addonname][debugging],  
e.g.: 4446|5557|true|activitytoolsserver|false

We have finished the configuration of the CRM Part and now need to **configure the ADFS**.

1. Please logon your AD FS Server and start AD FS 2.0 Management.
2. On the actions menu located in the right column, click "Add Relying Party Trust".
3. In the "Add Relying Party Trust"-wizard, click "Start"
4. On the "Select Data Source" page, click "Import data about the relying part published online or on a local network" and then type in the URL to locate the "federationmetadata.xml" file.

This federation metadata is created with the IFD-tool on the CRM server. For example, <https://activitytoolsserver.rc1ifd.ptmedv.at:4446/FederationMetadata/200706/FederationMetadata.xml>

Type this URL in your browser and verify that no certificate-related warnings appear.

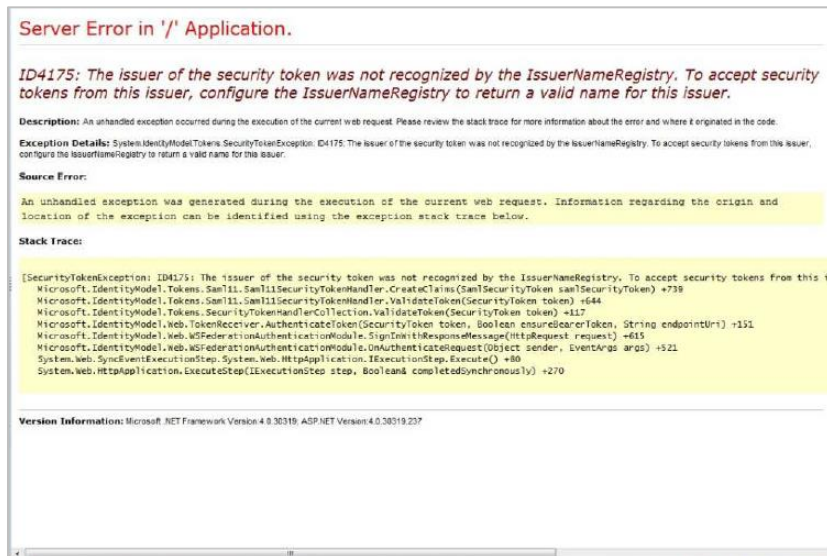
5. Click "Next".
6. On the "Specify Display Name" page, type in a display name such as DocumentsCorePack IFD, and click on "Next".
7. On the "Choose Issuance Authorization Rules" page, leave the "Permit all users to access this relying party" option selected and then click "Next".
8. On the "Ready to Add Trust" page, click "Next", and then click "Close".
9. If the "Rules Editor" appears, click on "Add Rule". Otherwise, in the "Relying Party Trusts" list, right-click the relying party object that you created, click "Edit Claims Rules" and then click "Add Rule". **Important:** Be sure that the "Issuance Transform Rules" tab is selected.
10. In the "Claim rule template" list, select the "Pass Through or Filter an Incoming Claim" template, and then click "Next".
11. Create the following rule:
  - Claim rule name: Pass Through UPN (or something descriptive)
  - Add the following mapping:
    - i. Incoming claim type: UPN
    - ii. Pass through all claim values
12. Click "Finish".

- 13.** In the "Rules Editor", click "Add Rule" and in the "Claim rule template" list select the "Pass Through or Filter an Incoming Claim" template. Then click "Next":
  - Claim rule name: Pass Through Primary SID (or something descriptive)
  - Add the following mapping:
    - i. Incoming claim type: Primary SID
    - ii. Pass through all claim values
- 14.** Click Finish.
- 15.** In the "Rules Editor", click "Add Rule".
- 16.** In the "Claim rule template" list, select the "Transform an Incoming Claim" template and then click "Next".
- 17.** Create the following rule:
  - Claim rule name: Transform Windows Account Name to Name (or something descriptive)
  - Add the following mapping:
    - i. Incoming claim type: Windows account name
    - ii. Outgoing claim type: Name
    - iii. Pass through all claim values
- 18.** Click "Finish" and when you have created all three rules, click on "OK" to close the "Rules Editor".

You have finished the configuration and you should be able to use the Addon in your IFD/Claims Environment now.

## 11 Troubleshooting

If you see the following error, there may be two reasons for this:



### Reason 1:

This indicates you are using a wrong certificate for the ADFS signing. Make sure the thumbprint in the web.config matches the one the token signing certificate in ADFS.

```
<issuerNameRegistry
type="Microsoft.IdentityModel.Tokens.ConfigurationBasedIssuerNameRegistry,
Microsoft.IdentityModel, Version=3.5.0.0, Culture=neutral,
PublicKeyToken=31bf3856ad364e35">
  <trustedIssuers>
    <add thumbprint="37a59abae1a394ffd8f0fd750c2e38e98069e349"
name="http://win2008domain.ptm-edv.at/adfs/services/trust" />
  </trustedIssuers>
</issuerNameRegistry>
```

### Reason 2:

This error could also indicate access rights problems with the certificates private key (Mainly an issue for self-signed certificates).

Open your certificate store on the server (MMC, add certificate snapin for local computer) and find your HTTPS certificate. In the context menu, under all tasks select the "manage private keys" option and grant access to everyone.

### Checklist for general troubleshooting:

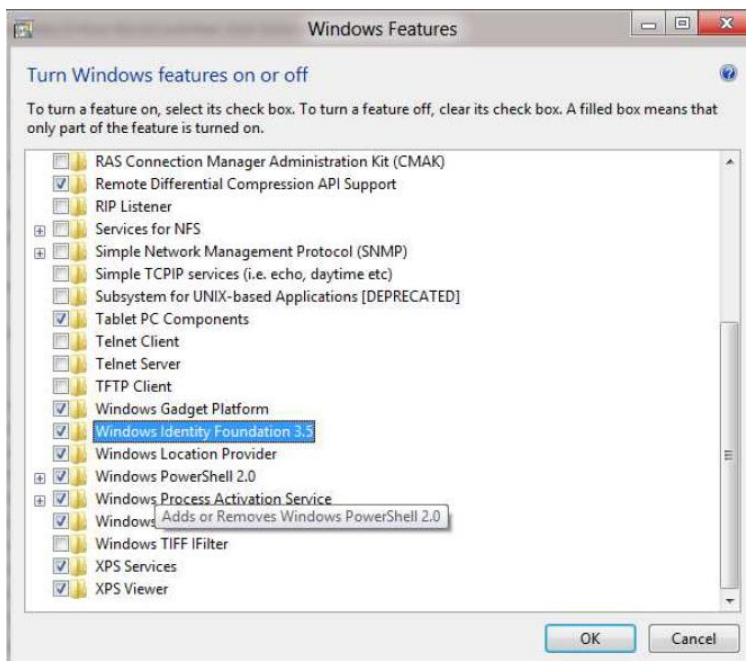
- Is the Setting WebApplicationPort still intact
- Are there any not http/https bindings in CRM
- Are there any not http/https bindings in the products website
- Is the DNS correctly resolving the products link
- Has the ConnectionProfile been created with IFD as connection type.

## 12 Windows 8 WIF Framework installation (WindowsIdentityFoundation)

Windows 8 has the WIF Framework built-in. Therefore, our installers will fail for now trying to update the WIF on windows 8 clients.

To activate WIF on Windows 8 run Control Panel > Programs and Features > turn Windows Features on or off.

Then check the Windows Identity Foundation 3.5 check box in the Windows Features dialogue box and click OK:



## 13 DocumentsCorePack Templates

DocumentsCorePack templates are predefined Word-templates which have some DocumentsCorePack merge fields in it. You can define several templates for each MS CRM entity (e.g. account, contact...).

For example: You created an "Account reconnect"-template that should be used to send information to accounts. Once created and stored, every MS CRM user can generate "Account reconnect"-letters based on this template.

**NOTE:** Some basic templates like "Account Reconnect", "Gift Certificate" for contacts and "quote" – templates come with the installation of DocumentsCorePack.

### 13.1 How to create DocumentsCorePack Templates

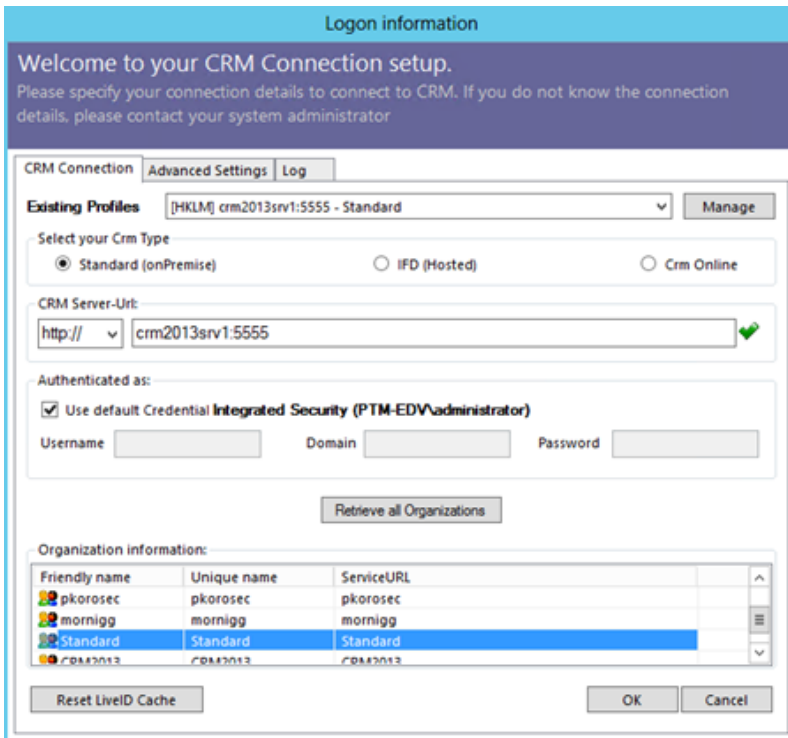
Read the "[User Guide](#)" to get more information about the creation of DocumentsCorePack templates.

### 13.2 Import existing DocumentsCorePack Templates

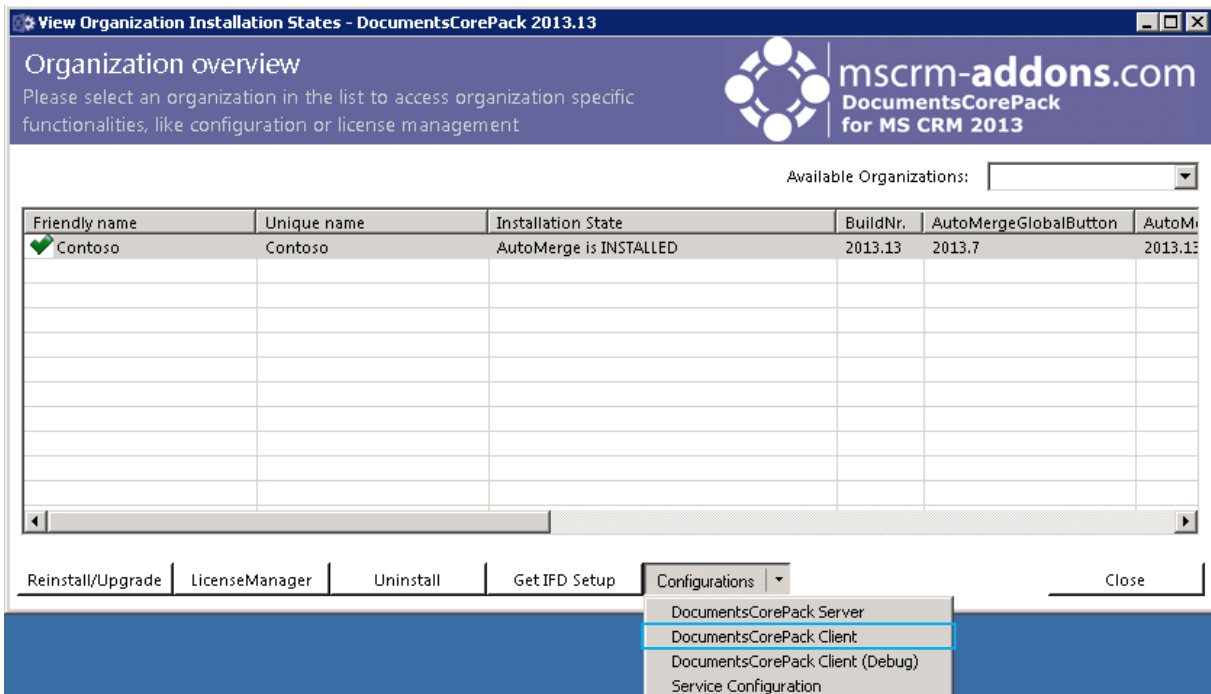
Open your DocumentsCorePack Server Configuration and choose the organisation for which you want to import/export the Templates. See screenshots below:



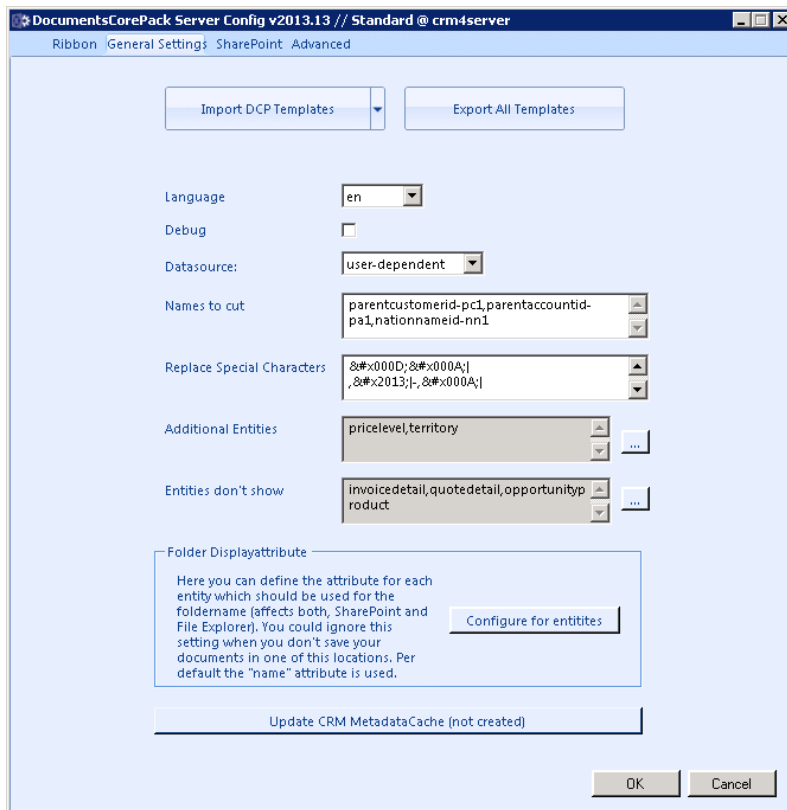




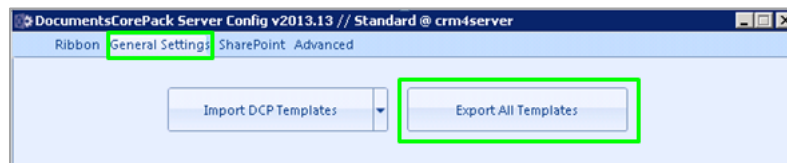
The screenshot above shows the CRM Connection setup where user credentials can be set. Choose your organization and click on [OK]. This action will open following window:



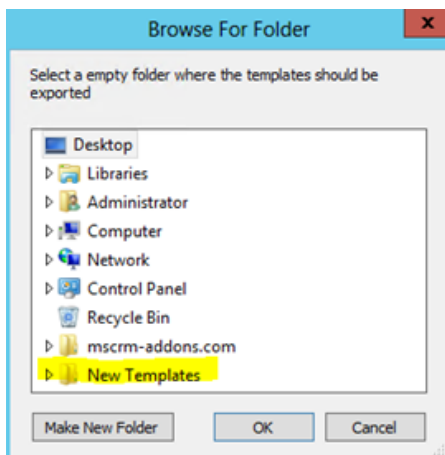
The screenshot above shows the organization overview. Select an organization to access to the configurations. Click on the dropdown button next to Configurations and choose DocumentsCorePack Client. See screenshot above. This action will open the DocumentsCorePack Client Configuration; there click on the General Settings tab. See next screenshot:



First click on [Export All Templates] to export all Templates from your CRM-test system on your local computer. See next screenshot highlighted in yellow:



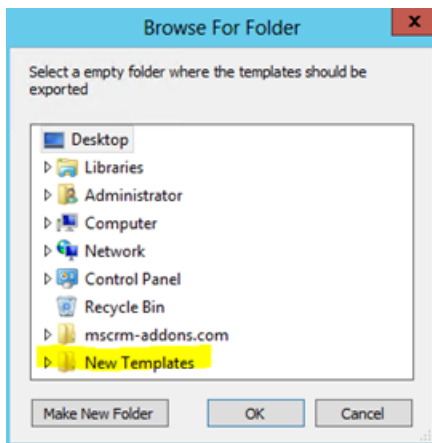
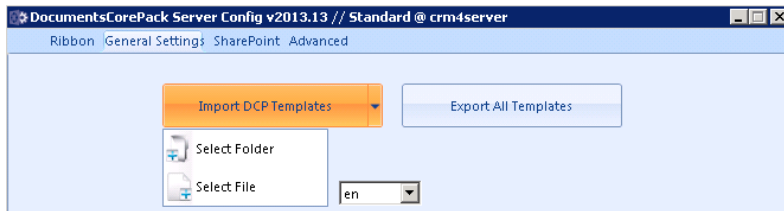
Chose an existing folder or create a new one where all Templates will be exported out of CRM. See next screenshot highlighted in yellow:



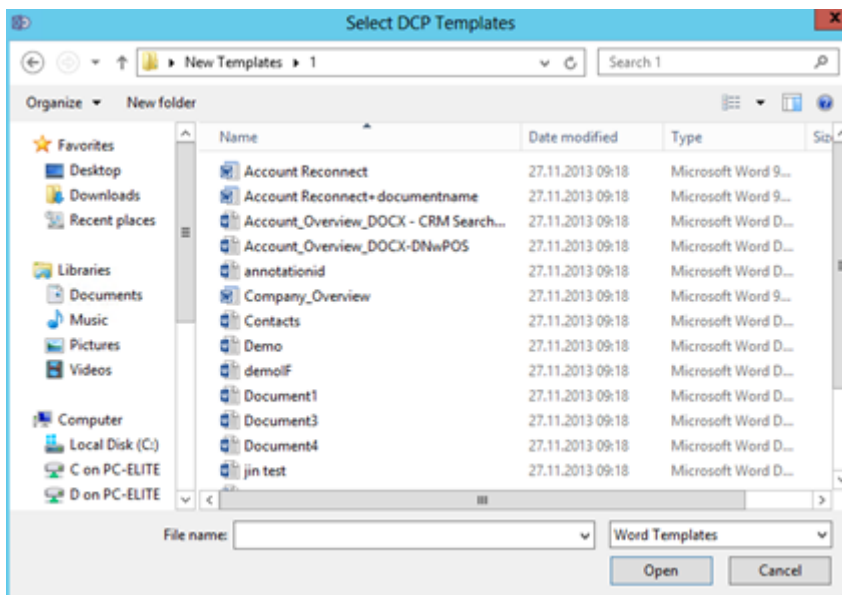
This is necessary in order to import the templates.

### 13.2.1 Import a Folder / Import a File

To import a folder or a file, click on the drop-down-button next to [Import DCP Templates] and select whether to import a folder or a file. See next screenshots:

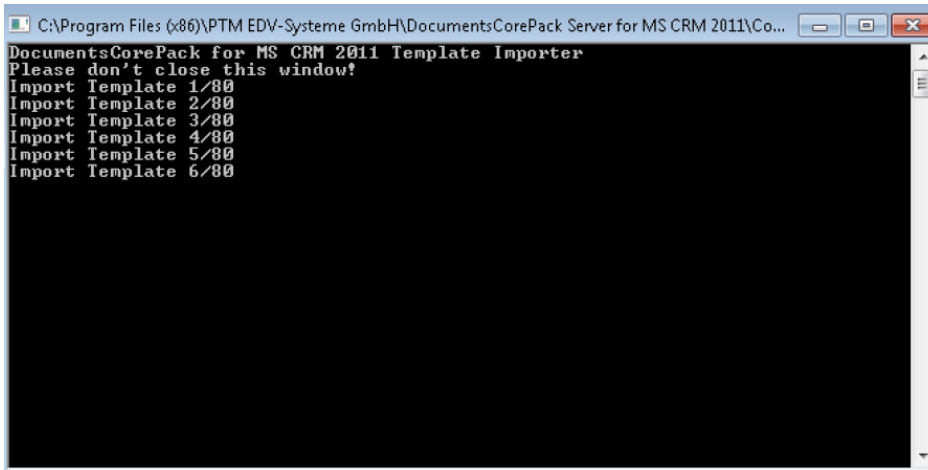


Next screenshot shows the Template folder: '



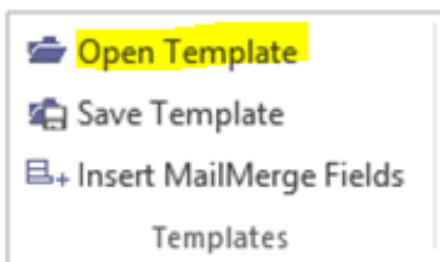
### 13.2.2 Processing Import

After you selected a folder or a file, you'll see the following window:



Please don't close this window! It will be closed automatically when the import was successful.

Now the Templates are imported in MS Word and ready to use with a click on "Open Template". See next screenshot:



## 14 Language Settings for DocumentsCorePack

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

### 14.1 Language Settings on the Client

#### 14.1.1 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 the DocumentsCorePack installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Client for MS CRM 2011\Localization".

Example:

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

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

**NOTE:** Please note that these languages files can only be used if the set language is the same as the user language of your CRM system.

#### 14.1.2 Modify the UI language on the Client

The UI language is determined at start up 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 EDVSysteme\DocumentsCorePackClient2011.**
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 have to open the registry and to change the value of "language" setting to **nl**.

### 14.1.3 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.

---

## 14.2 Language Settings on the Server

### 14.2.1 Location of the Language Settings on the Server

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

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

The language file is located in the sub folder **localization** of DocumentsCorePack installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Server for MS CRM 2011\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 DocumentsCorePack, you have to translate both files, the language file on the client and on the server.

**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.

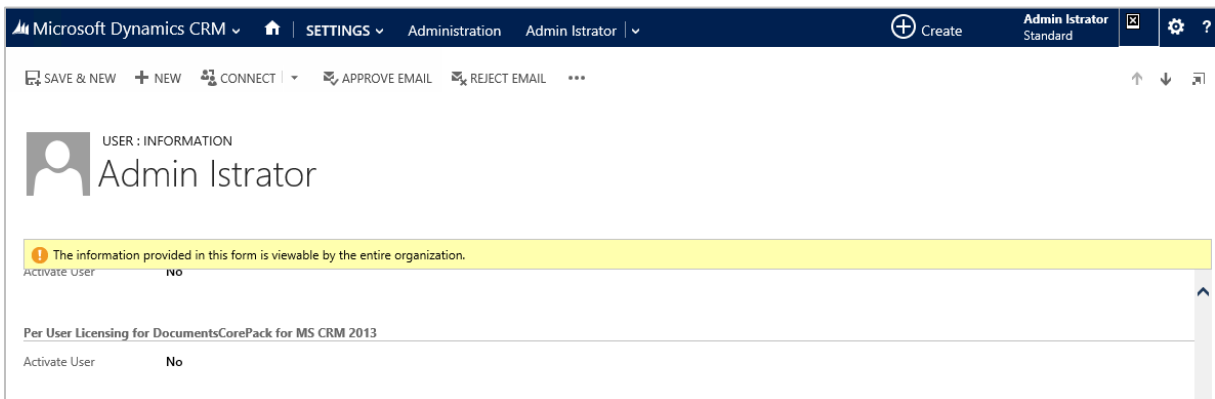
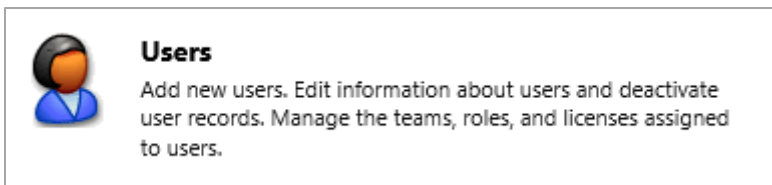
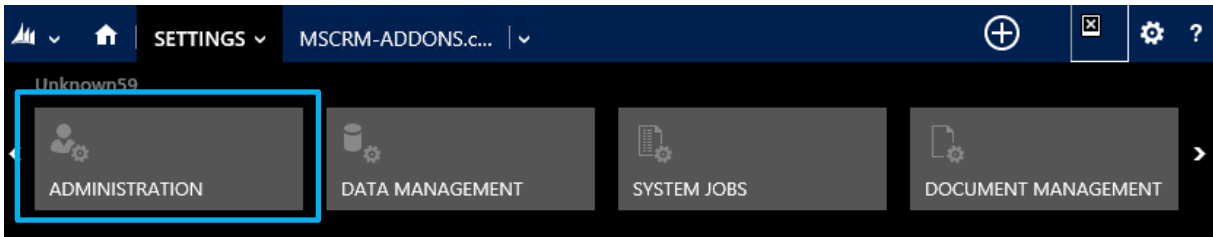
### 14.2.2 How to translate a language file

Have a look at chapter [14.1.2](#)

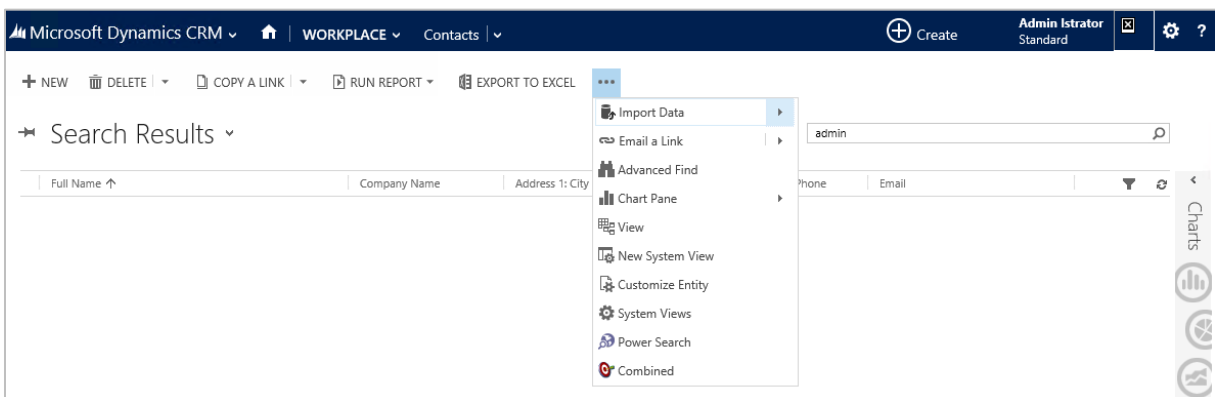
## 15 Per User Licensing –option

In CRM 2013 go to Settings/Administration/Users and pick a user. You will see “Per User Licensing for DocumentsCorePack for MS CRM 2013” where you are able to activate or disable a user’s license.

If you activate more users as you have licenses, the product will stop working for all users. See screenshots below:



By setting this option to “no”, the license will be disabled for this user and the “Create Document” - button will be disabled as shown in the following screenshot.





---

## 15.1 Important Information

If you change the NamesToCut KEY maybe all OLD templates will be affected, because the merge fields are still stored with the long name in your old templates.

Example:

You have an existing document with two merge fields:

parentaccountid\_name and parentaccountid\_fax

Now you change the setting to shorten parentaccountid to pc1. NEW Templates will be filled correctly! (Insert Mail Merge Fields inserts the correct short name into your template.)

All OLD templates which use merge fields and which include parentaccountid will not work anymore! So you have to edit them! (maybe by using the Replace...-function of Word) Sometimes it will be the better way to replace full merge fields. So instead of changing just a part of a merge field let DCP replace the whole one.

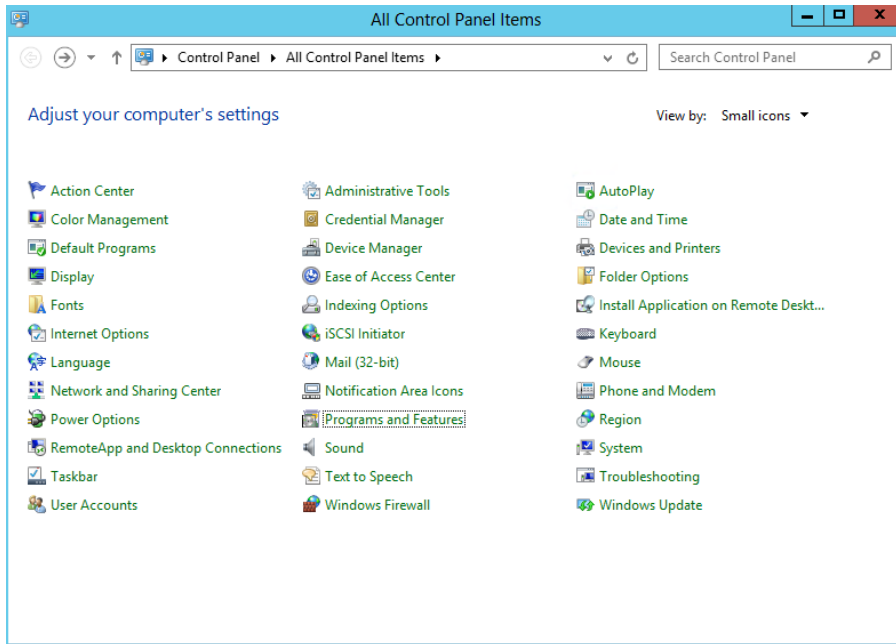
For example:

From "customerid\_contact\_parentcustomerid\_address1\_fax" to

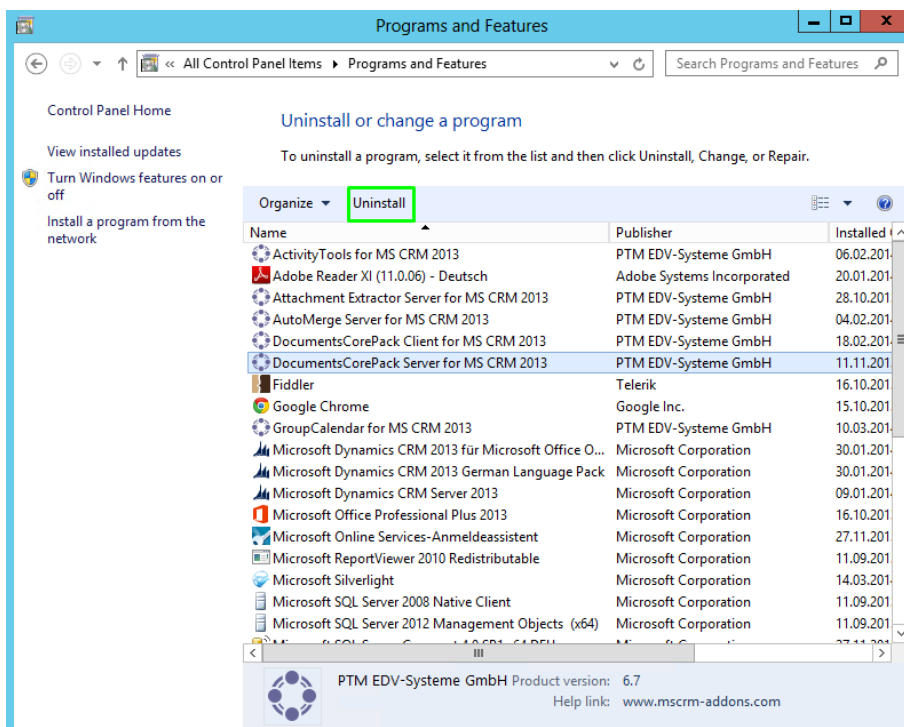
"cust\_cont\_par\_adr1\_fax"; Old templates won't be affected, but you have to add every field to the settings.

## 16 Uninstall DocumentsCorePack Server Component

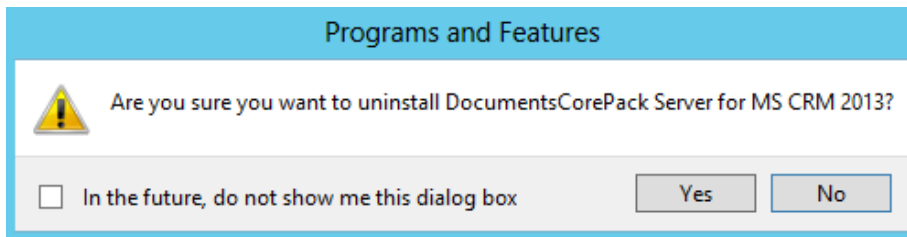
To uninstall DocumentsCorePack Server for MS CRM 2013 select “Programs and Features” in the Control Panel.



Search for the DocumentsCorePack Server CRM 2013 in “Uninstall or change a program” and click on “Uninstall”



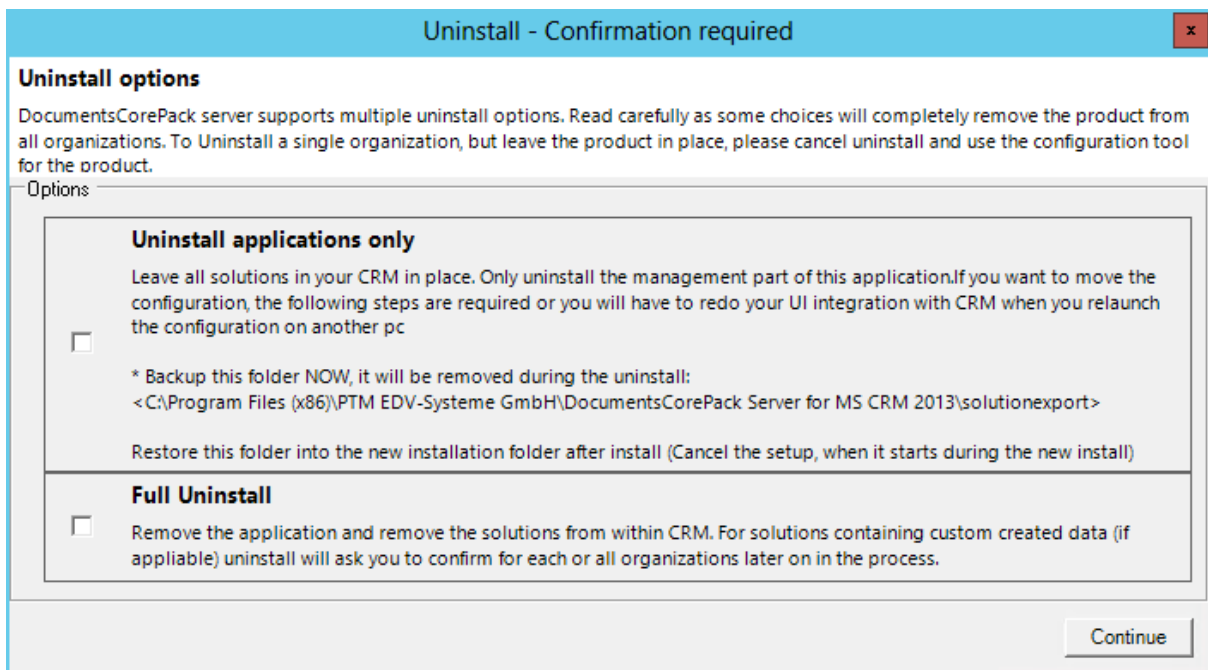
Following window appears:



Click on [Yes] to fully uninstall DocumentsCorePack Server for MS CRM 2013.

Click on [No] if you don't want to uninstall DocumentsCorePack Server for MS CRM 2013.

If you click on [Yes] following window appears:



Choose between "Uninstall applications only" or "Fully Uninstall" and click on [Continue].

It may take a few minutes to uninstall DocumentsCorePack Server.

## 17 Installation Client Component

This chapter explains how to install the client component.

### 17.1 Installing the DocumentsCorePack 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 ensure that Word and Outlook are not running, start the Windows **Task manager** and check that WINWORD.EXE and OUTLOOK.EXE are not running in the processes list.

#### **Install the component on the client:**

Run the "DocumentsCorePack Client for MS CRM 2013.exe" setup file.  
You will see following window:



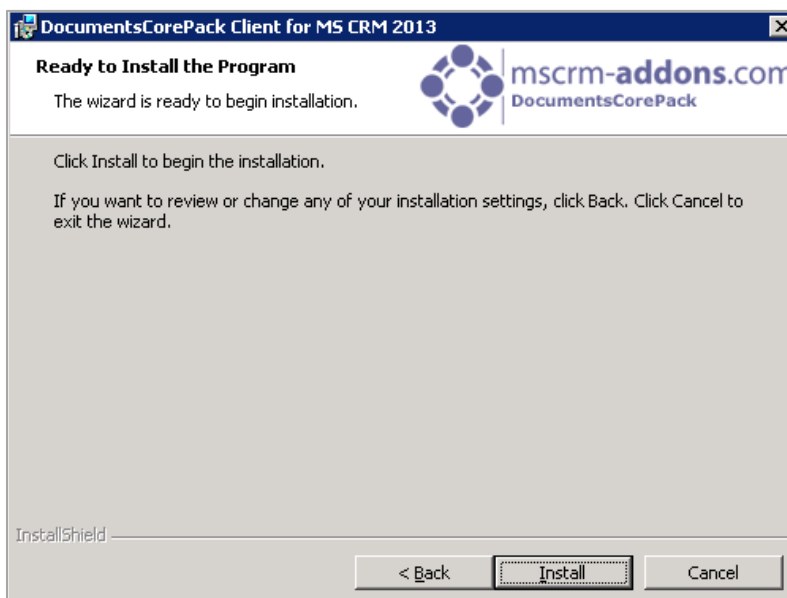
Click [Next >]

## 17.2 End User License Agreement (EULA)



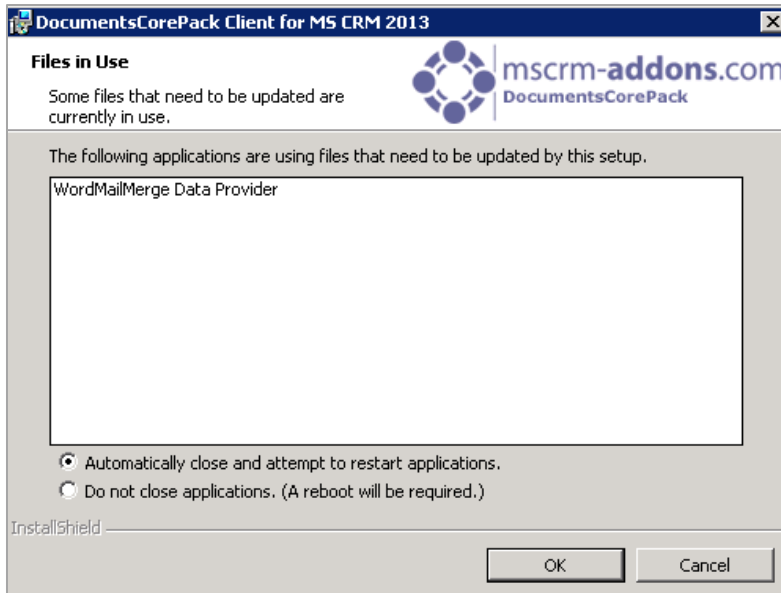
Accept the license agreement and click [Next >]. Following window appears:

If this is a new installation you will automatically get to [chapter 10.3](#).



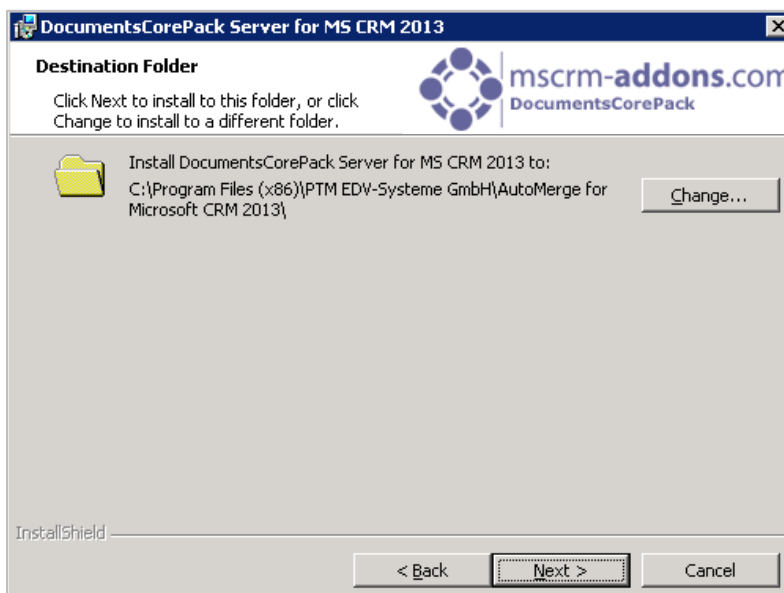
Click on [Install] to start the installation.

NOTE: for the case that an old DocumentsCorePack Client is currently in use on the same server you will see following window:



Click on [OK] to continue.

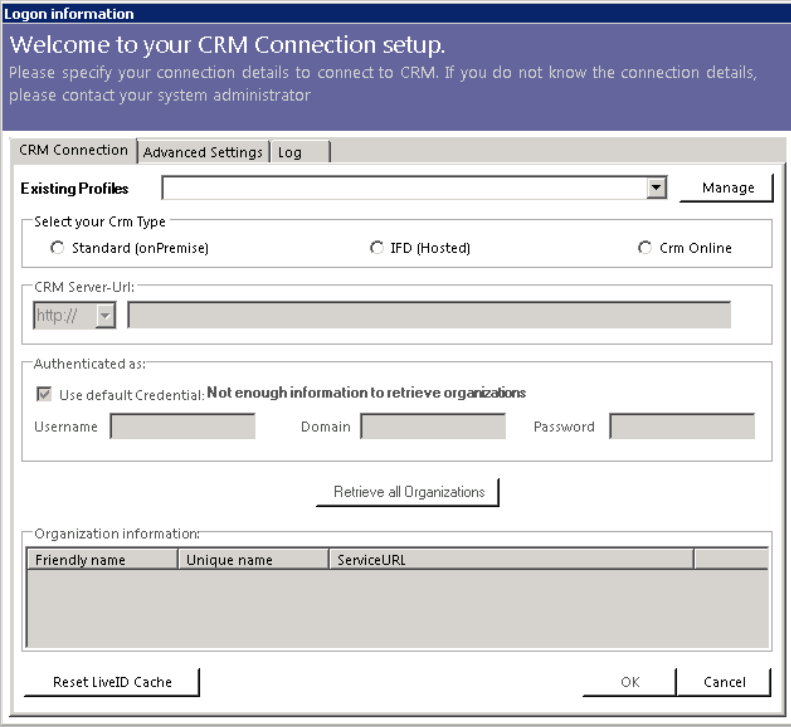
### 17.3 Select the installation folder



Select the installation folder and click [Next >]

## 17.4 Configure CRM Server

Next you have to configure your CRM server, select your profile or create a new profile and select your CRM Server type:



To configure your CRM server, select your profile or create a new profile and select your CRM Server type. Choose the server path and add your login credentials by filling in the field's username, password and domain or choose the default credentials. Click on [Retrieve all Organizations], as soon as the organizations are retrieved, choose one and press the "OK"-button. (See next screenshot).

For DocumentsCorePack, the IFD setup is only required when using FileExplorer or SharePoint Folder and Sites Integration. You have to install IFD before you can use it. You can find the IFD wizard here: <http://www.mscrem-addons.com/Downloads/DownloadIFDToolforMSCRM2011/tabid/195/ctl/Login/language/enUS/Default.aspx?returnurl=%2fDownloads%2fDownloadIFDToolforMSCRM2011%2ftabid%2f195%2fDefault.aspx>

**Logon information**

Welcome to your CRM Connection setup.  
Please specify your connection details to connect to CRM. If you do not know the connection details, please contact your system administrator

CRM Connection | Advanced Settings | Log

Existing Profiles: [HKLM] crm2013 - Contoso Manage

Select your Crm Type  
 Standard (onPremise)   
  IFD (Hosted)   
  Crm Online

CRM Server-Url:  
 http:// [crm2013] ✓

Authenticated as:  
 Use default Credential: **CONTOSO\Administrator**  
 Username: Administrator    Domain: CONTOSO    Password: \*\*\*\*\*

Retrieve all Organizations

Organization information:

Friendly name	Unique name	ServiceURL
crm2013	crm2013	crm2013
Contoso	Contoso	Contoso

Reset LiveID Cache    OK    Cancel

Click [OK] to continue.

## 17.5 DocumentsCorePack Client Options

Choose the preferred options you want to use and click on [OK]

**Documents Core Pack Options**

Setup 1.1.5200.17168

Set your preferred Settings

Advanced Options

Defaulttype:  
 Address ▼

'Send as PDF'-Button is visible.  
 Organization-Button visible  
 Automatically update metadata

Options for cooperation with Server Component

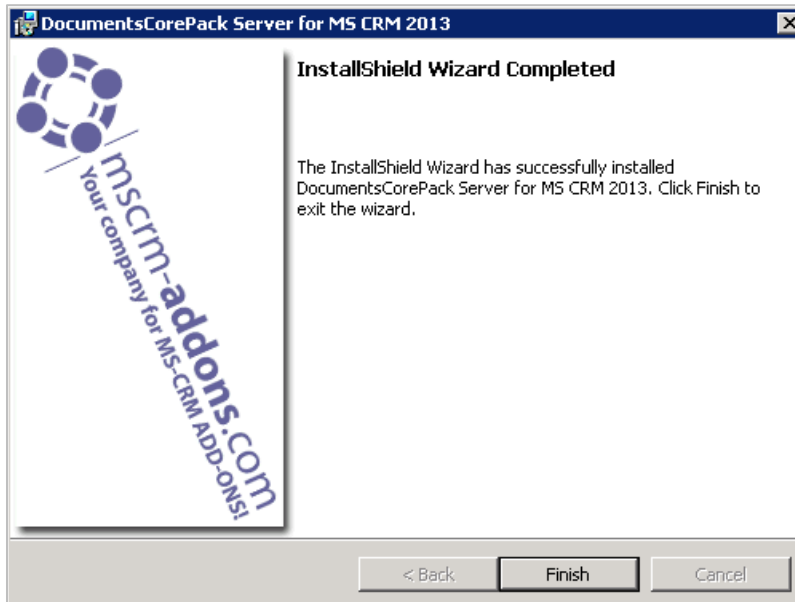
Automatically merge to new document

OK



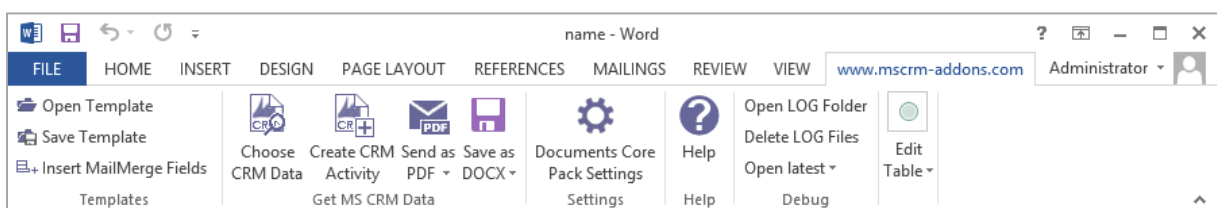
## 17.6 Finish

The installation is now completed. Click on [Finish]



## 17.7 The “www.mscrm-addons.com”-tab

Once having finished the installation, go to your MS Word and you will see the www.mscrm-addons.com-tab on the ribbon. See next screenshot:

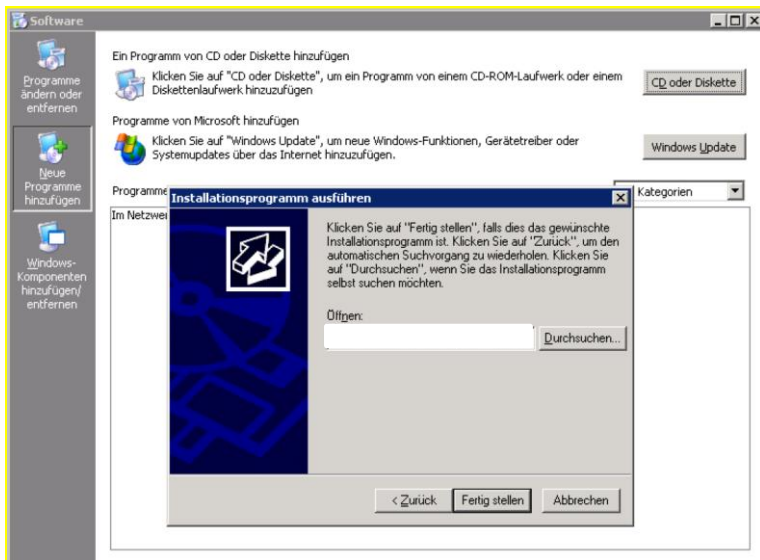


The [www.mscrm-addons.com](http://www.mscrm-addons.com) – tab contains several options, like create a template with the “Insert MailMerge Fields”-option, “Create CRM Activity” or to send the document as a .pdf. Click on the www.mscrm-addons.com sign.

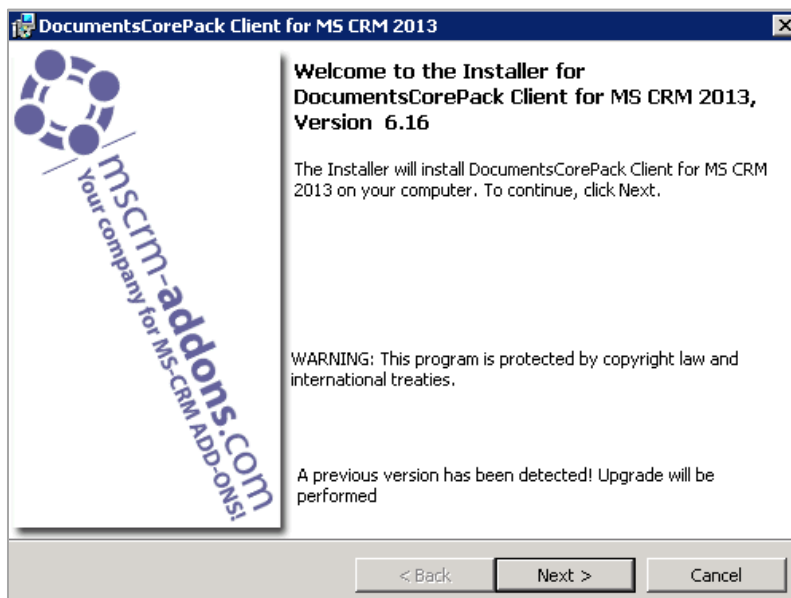
Here you can, e.g. save your document back to the specific SharePoint folder related to the CRM-record. Or send your Document directly by clicking on the “Send as”-button. For more information, please read our DocumentsCorePack Client User Guide.

## 17.8 Installation on a Terminal Server / Windows Server 2008

To install DocumentsCorePack on a terminal server, you have to open the Control Panel and then the Add/Remove Programs-option. Click on the „Add new programs“-button. Now click on the „CD or floppy disc“-button to open the installation wizard and chose the DCP setup file. Finally, you have to click on [Finish] to start the installation.



You will see following window:

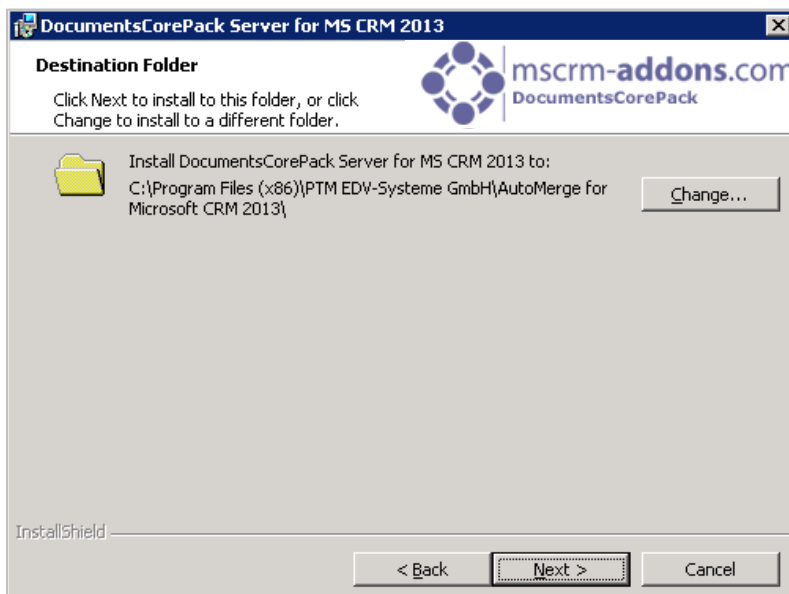


Click [Next]

End User License Agreement (EULA)

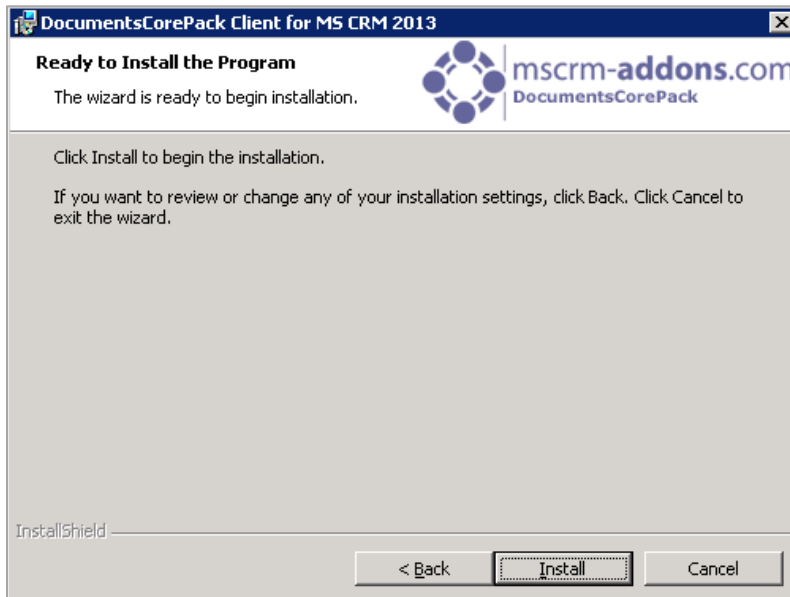


Select Installation folder.



Click [Next >]

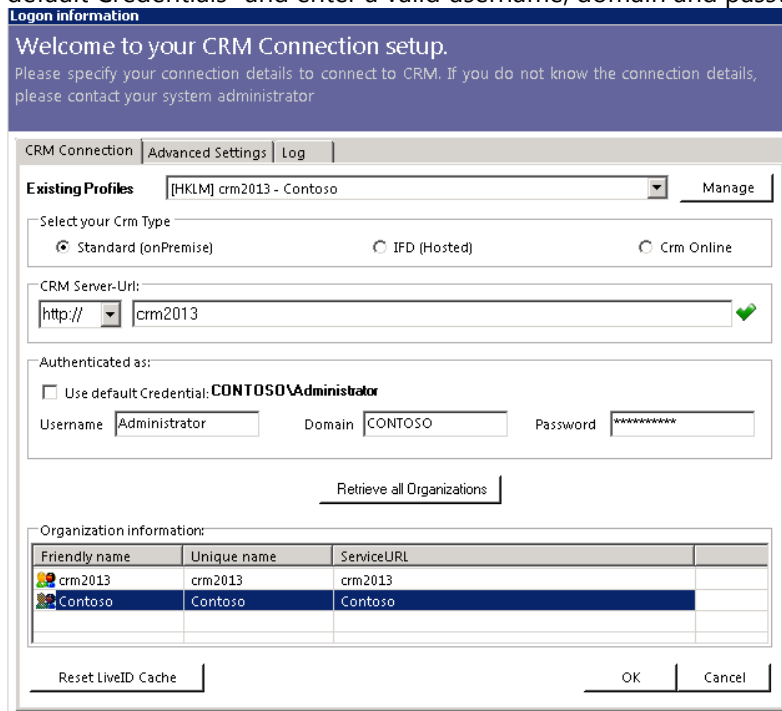
Confirm the installation



Click [Install]

In the connection-dialog, you have to enter the CRM server-name with the port.  
(e.g.: servername : crm, port : 5555)

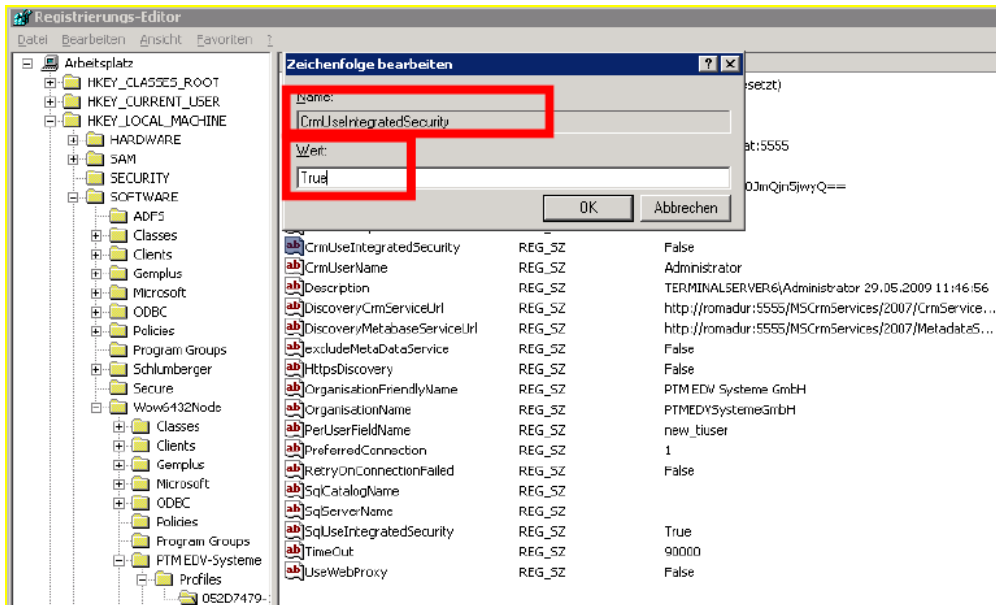
When installing on a terminal server, you have to change the "Login Credentials". Uncheck the "Use default Credentials" and enter a valid username, domain and password.



**IMPORTANT:** Finally, you have to change a registry entry to use integrated security.

Start > Run > „regedit“ and browse to “HKEY\_LOCAL\_MACHINE\SOFTWARE\PTM EDVSysteme\ and choose the configured profile (you can see the profile used in the HKLM\SOFTWARE\PTM EDV Systeme\DocumentsCorePackclient2011\ActiveProfileSetting)

The regarding entry is called „**CrmUseIntegratedSecurity**“. Change the value to „**true**“.



## 17.9 Unattended Setup DocumentsCorePack Client for MS CRM 2013

To install the DocumentsCorePack Client for MS CRM 2013 unattended, you need to supply a registry file with the required registry settings. The unattended install is available for the DocumentsCorePack Client Version 5.18 and above.

**ATTENTION!** The Microsoft Windows Identity Foundation software MUST be present previous to the installation or the installation will fail.

### Download the [uai-Template.reg \(1.18 kb\)](#)

This is a blank registry file containing all required keys. You need to replace the following tags with your actual CRM data:

[YOURCRMSEVER:PORT] : The URL of the CRM server without any protocol information, e.g. crm:5555.

[UNIQUEORGANISATIONNAME] : The unique name of the organization you want to connect to.

OrganisationFriendlyName contains the organization name and also influences the name of the RibbonToolbar in Microsoft Word. While not vital, it should be changed to reflect the correct organisation name.

>If your discovery service is using https (usually, it is the same protocol as your CRM), the entry HttpsDiscovery needs to be set to "true".

You can then launch the setup with the prepared registry file - similar to the batch file [launch.bat \(116.00 bytes\)](#)

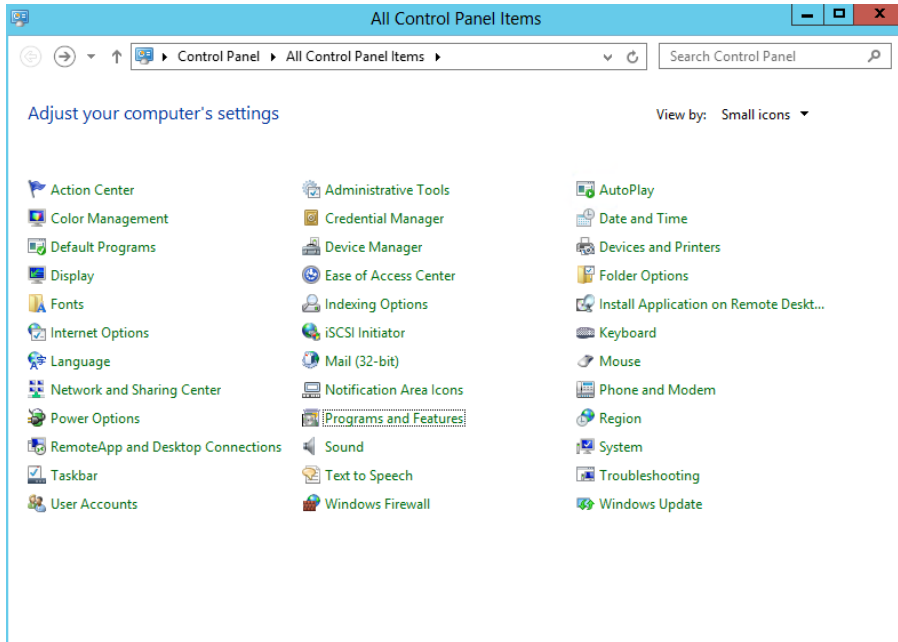
```
"[DocumentsCorePackInstallFolderAndFile]" /V"/qb /lvx* C:\instlog.txt  
UAIREGFILE=[RegFileLocation]\uai-template.reg"
```

The tags [DocumentsCorePackInstallFolderAndFile] need to point to the correct installation source folder and filename.

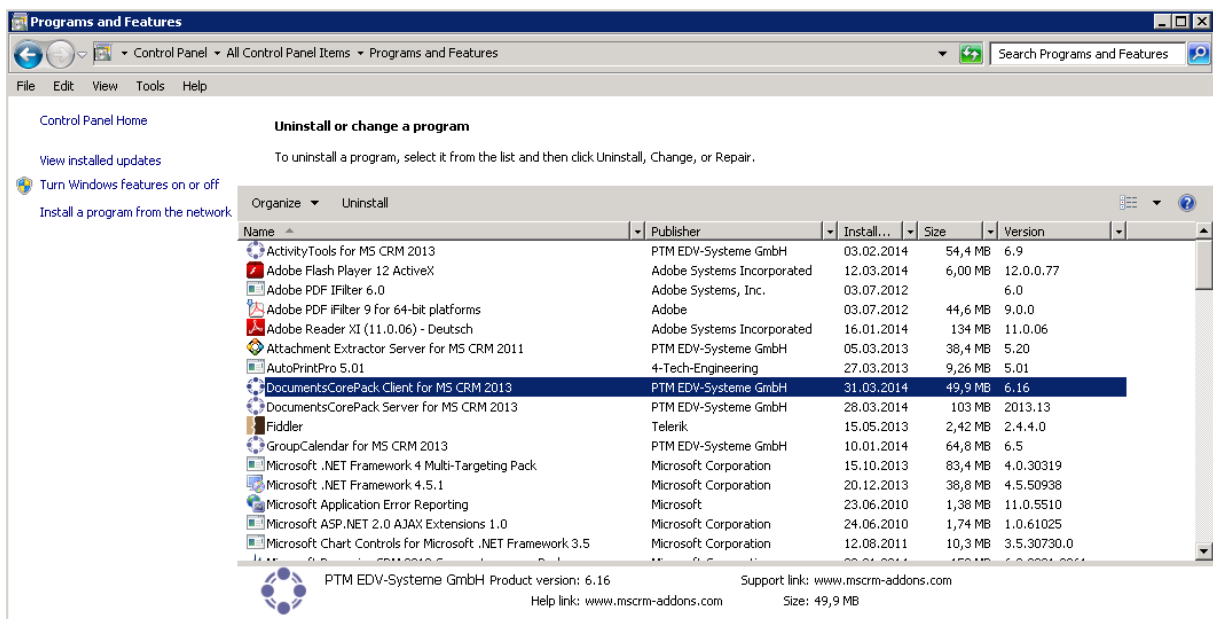
[RegFileLocation] needs to point to the folder of the prepared registryfile. If you changed the registry filename, you need to adapt this change in the command as well.

## 18 Uninstall DocumentsCorePack Client Component

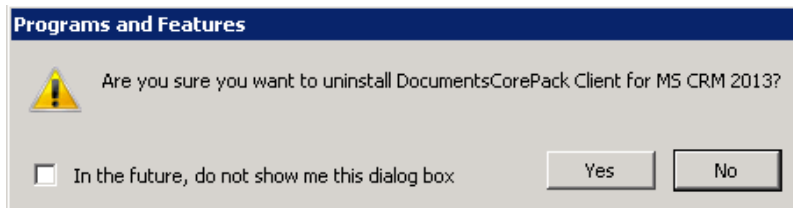
To uninstall DocumentsCorePack Client for MS CRM 2013 select “Programs and Features” in the Control Panel.



Search for the DocumentsCorePack Server CRM 2013 in “Uninstall or change a program” and click on “Uninstall”



Following window appears:



Click on [Yes] to confirm Uninstall.

Click on [No] to stop the process.

## 19 Contact

If you have questions to the product send an email to

[support@mscrm-addons.com](mailto:support@mscrm-addons.com)

or visit our blog

<http://blogs.mscrm-addons.com>

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