Documents Core Pack for MS CRM 4

Version 4.0

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

Implementation Guide for Documents Core Pack 4.0 (1.3)

Table of Contents

1 Installing of Documents Core Pack

Before installing Documents Core Pack, please read this document and follow the steps carefully.

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

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

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

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

1. Installing the server components of Documents Core Pack
2. Configuring the CRM system
3. Installing the client components of Documents Core Pack
4. Configuring client security

1.1 Installing the server component
The User must be online during the installation!

The server component of Documents Core Pack provides you with the capability to start a mail merge form the MS CRM Web Client.
The Documents Core Pack Server Component has to be installed on the server where MS CRM is running.

If the Documents Core Pack server- component has allready been installed, go on with 1.1.2 Upgrade.

1.1.1 Installing from scratch

To complete this task:

1. Run the "Documents Core Pack Server for MS CRM 4.msi" Setup file.

2. You will see following window:

Click Next>

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

4. You have to enter the name of the CRM-Server on the following screen. Don't forget the portnumber if its not 80 (e.g servername: ptm-titan , port:5555) (see 1.7.1)

5. CRMDocuments Core Pack Server – Installation Folder
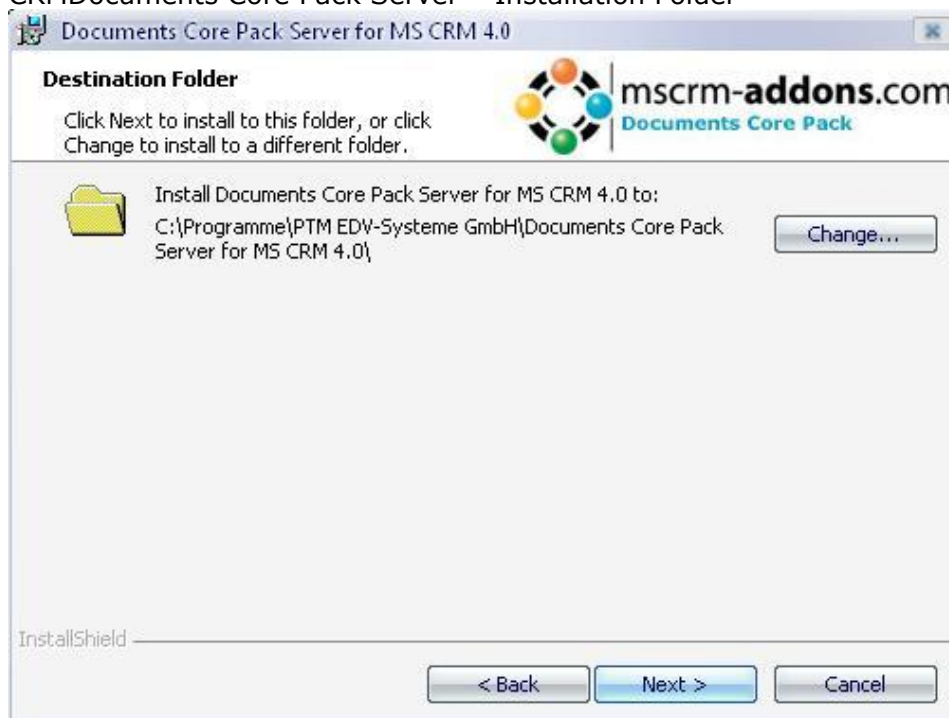
CRMMailMerge Server only installs a few Files on your Server and then creates an Virtual Directory in the IIS.

6. Confirm Installation

After Click on the Next Button the Installation begins.

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

8. After installing the Server component the DocumentsCorePackServerConfig.exe will be opened automatically.

It's also possible to start the exe via

-Start->All Programs->www.MSCRM-Addons.com->
Documents Core Pack for MS CRM 4.0->Documents Core PackServer Configuration

-..\\Program Files\PTM EDV-Systeme GmbH\Documents Core Pack Server for MS CRM 4 \config\Documents Core PackServerConfig.exe

If everything goes right, you will see…

* a new Button on each Objects you checked in the Documents Core Pack Server Config

1.2 Upgrading the Server component

To avoid uninstallation of the server component, its possible to perform upgrades without uninstall. Furtheron, all settings (CRM-servername,https,installation directory) will remain in System.
After running the "Documents Core Pack Server for MS CRM 4.msi" as usual, following window will appear:

The .msi detects previous installations automatically

1.3 Documents Core Pack Server configuration
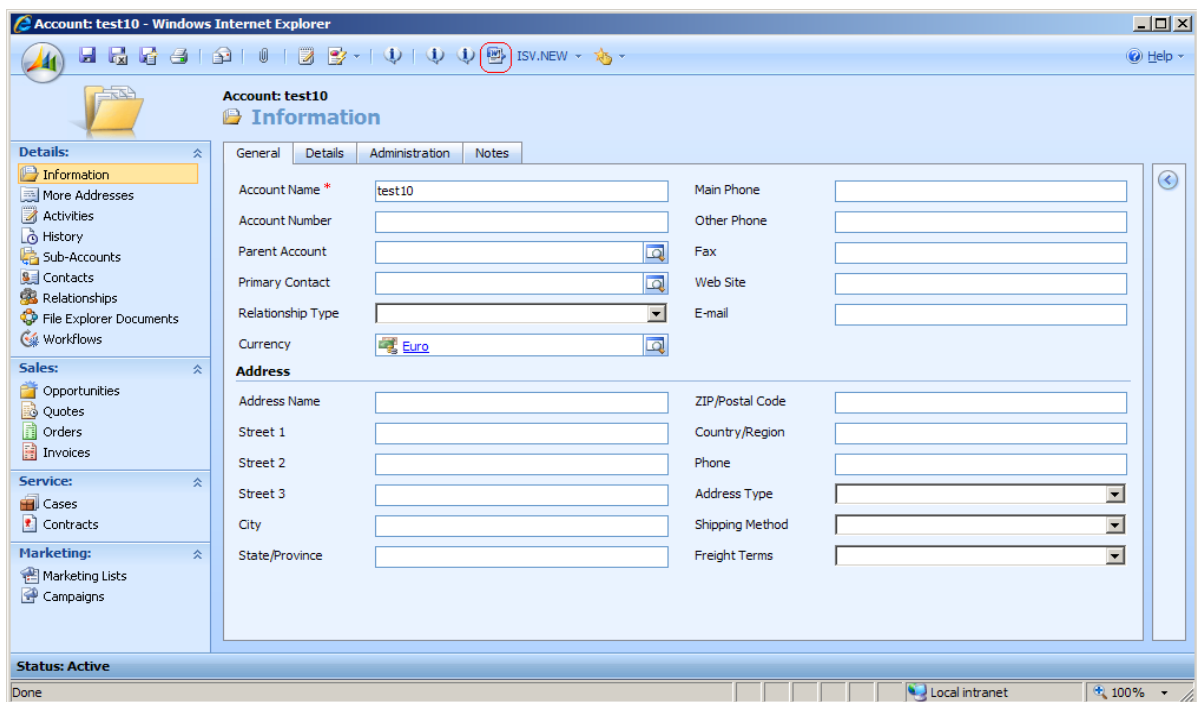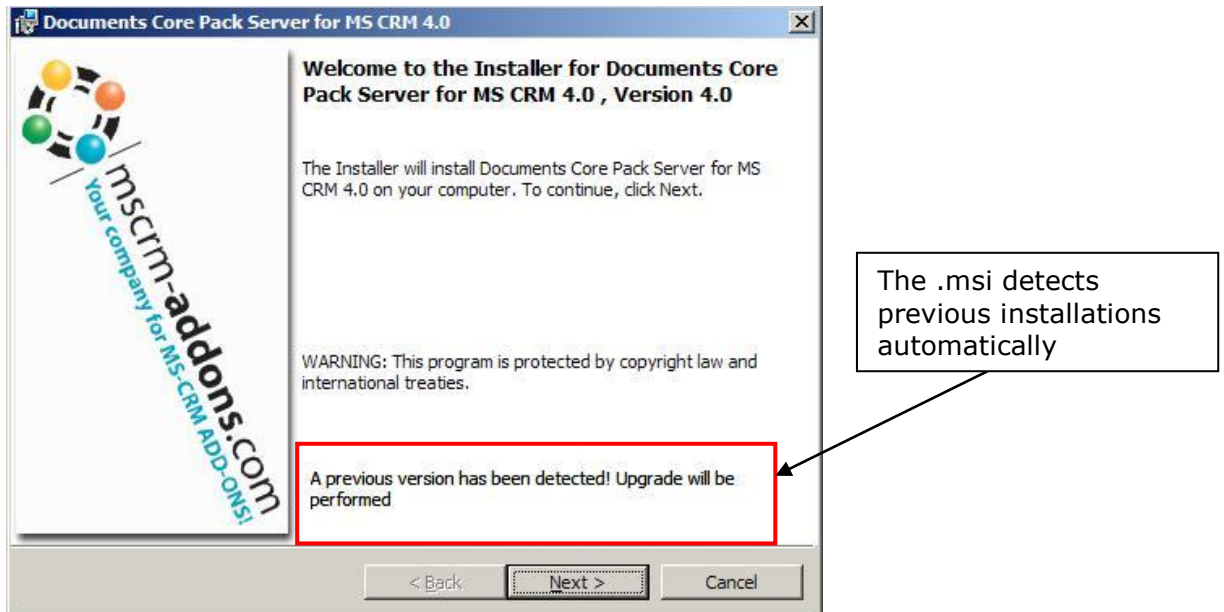
Its possible to open the Documents Core PackServerConfig.exe via

->Start->All Programs->www.MSCRM-Addons.com->
Documents Core Pack for MS CRM 4.0->Documents Core PackServer
Configuration
or
..\\Program Files\PTM EDV-Systeme GmbH\Documents Core Pack Server for MS
CRM 4 \config\Documents Core PackServerConfig.exe

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

1.3.1 ISV Config

Here its possible to choose the entities where the "Print in Word" button should
appear in CRM.
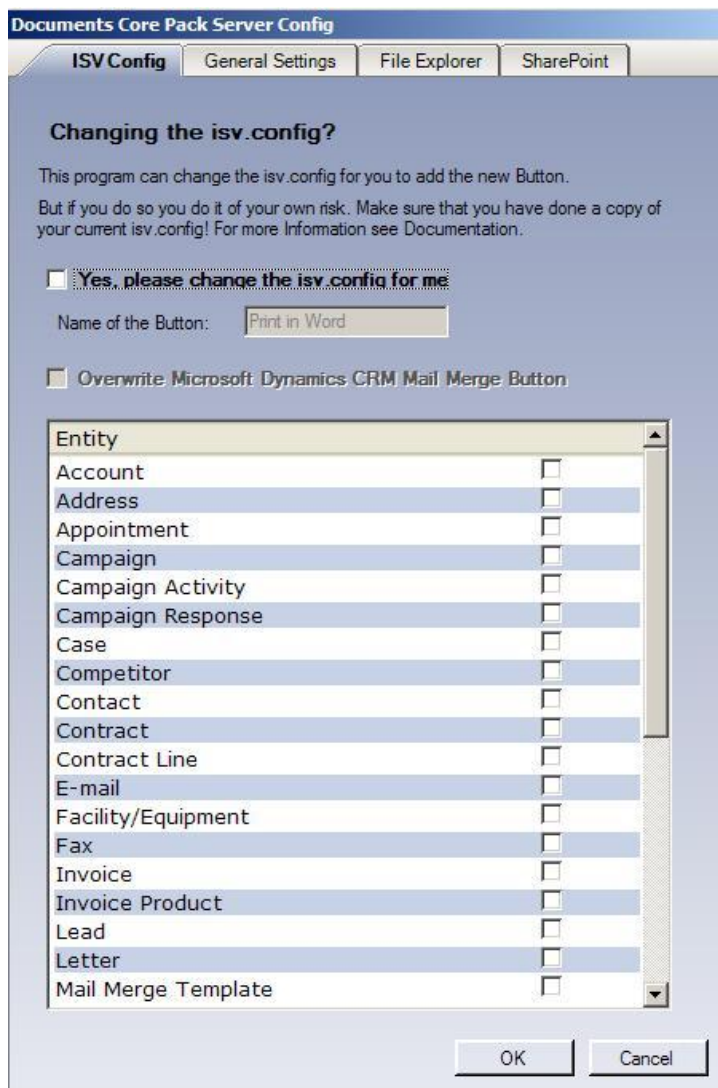
If you say YES, then Documents Core Pack Server Config creates a copy of the original and changes the isv.config for you.

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

If you want you can overwrite the Microsoft Dynamics CRM functionality by marking "Overwrite Microsoft Dynamics CRM Mail Merge Button". This setting will take effect on the following entities : account, contact, lead, opportunities, offerings and all user-defined entities.
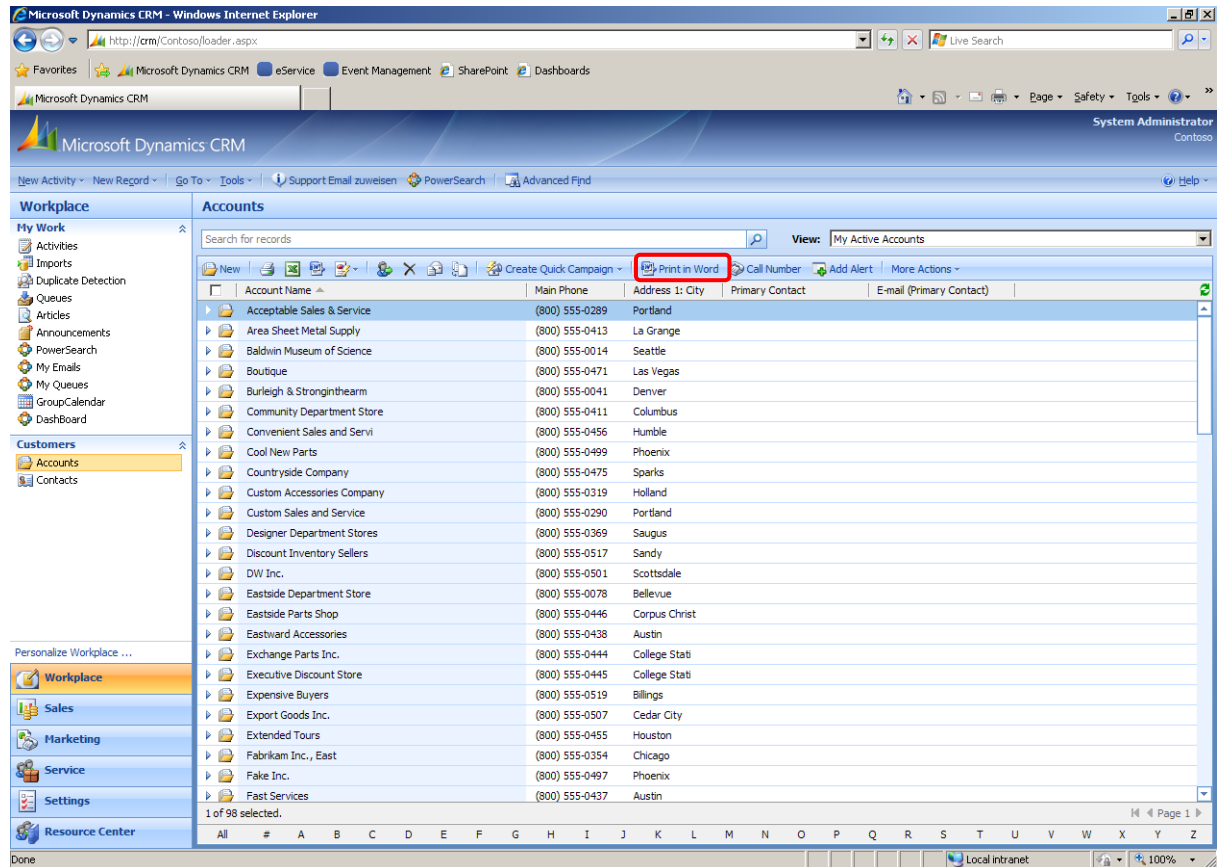
1.3.2 General Settings
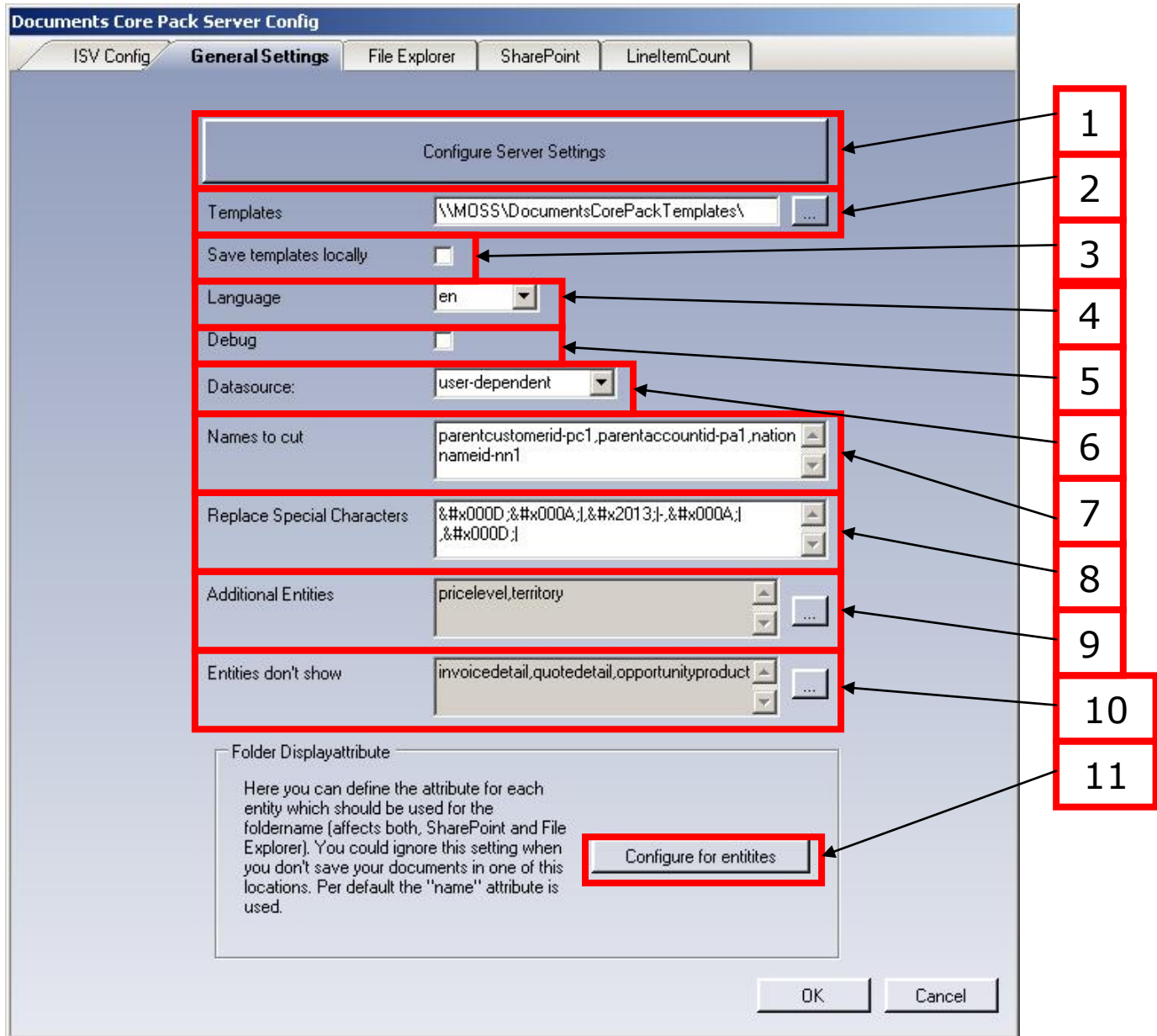
1) **Server Settings**
   Click on this button to open the Connection-Dialog.

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

3) **Save templates locally**
   to allow users to use templates from their local machines.

Users can specify the folder where they want to use the templates locally from in the Documents Core Pack Settings on the client.
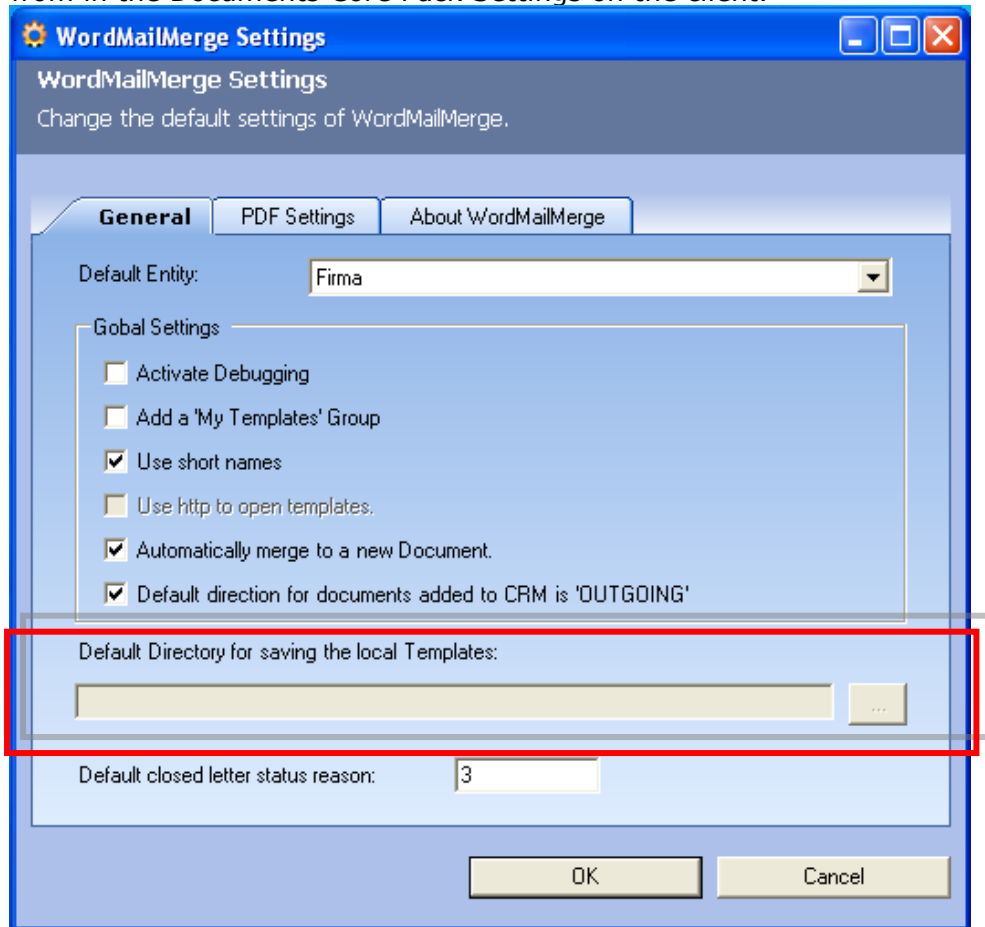

4) **Language**
You can choose the language in the dropdown-box. Languages are listed in language code (en for English, de for German)
To add another language please see chapter (1.5)

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

6) **Datasource**
Here you can select the type of data source.
This contains cached information from the CRM, which can be used with DCP.

7) **Names to Cut**
For detailed information see chapter 1.5.3

8) **Replace Special Characters**
Treated special exceptions cor certain Coding problems with CRM

9) **Additional Entities**
Documents Core Pack only shows customizeable entites by default.

If you want to use other entities for Documents Core Pack you have to define them in here.

Ad 6 & 7: To add entities, click on the [..]-icon. A new window will appear which allows you to insert entities.
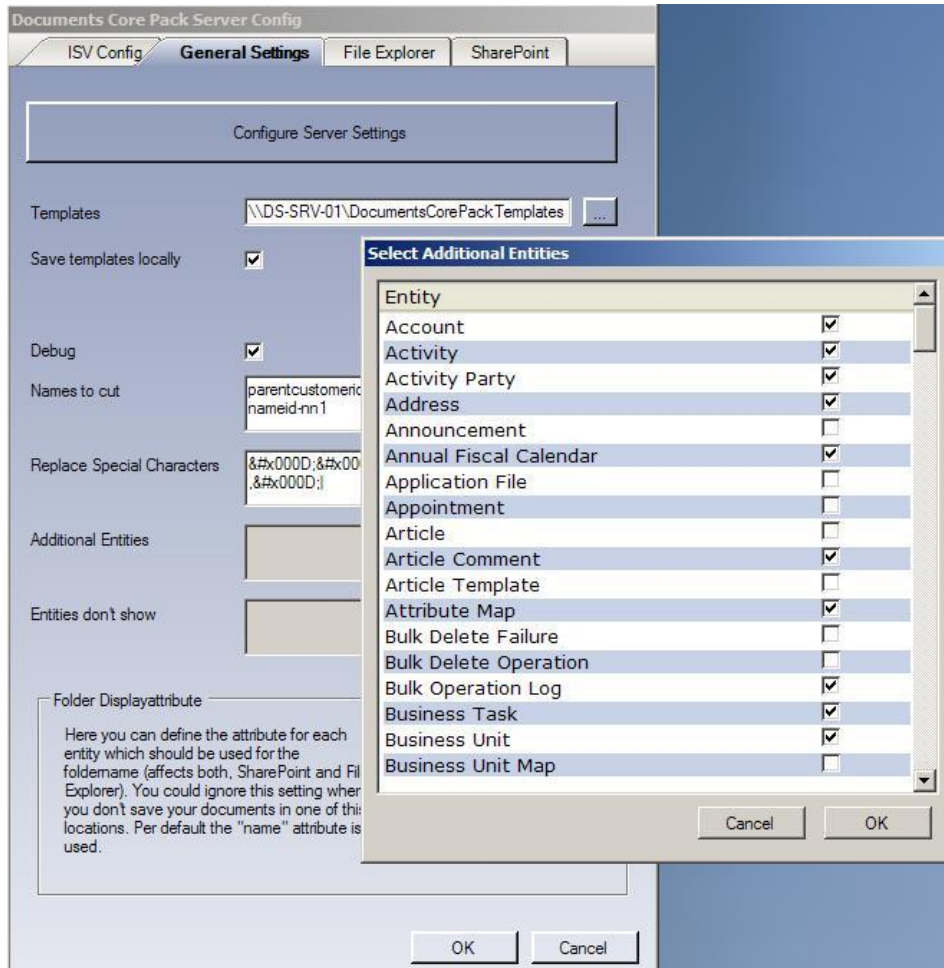
10) **Entities don´t show**

Entities that are registrered here, will be hidden and are not useable/visible with DocumentsCorePack .

1) **Folder Displayattribute**

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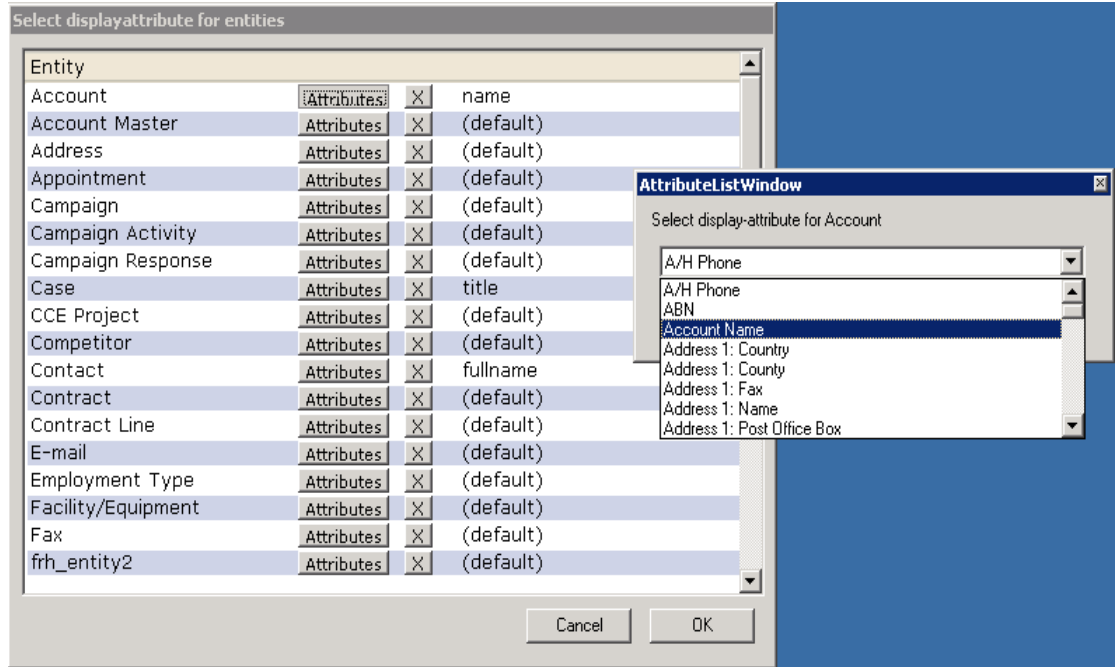
With the configuration above, documents created for the account entitie will be saved to to a "companyname"-folder, Cases will be saved to a "case-title" folder etc...

1.3.3 File Explorer

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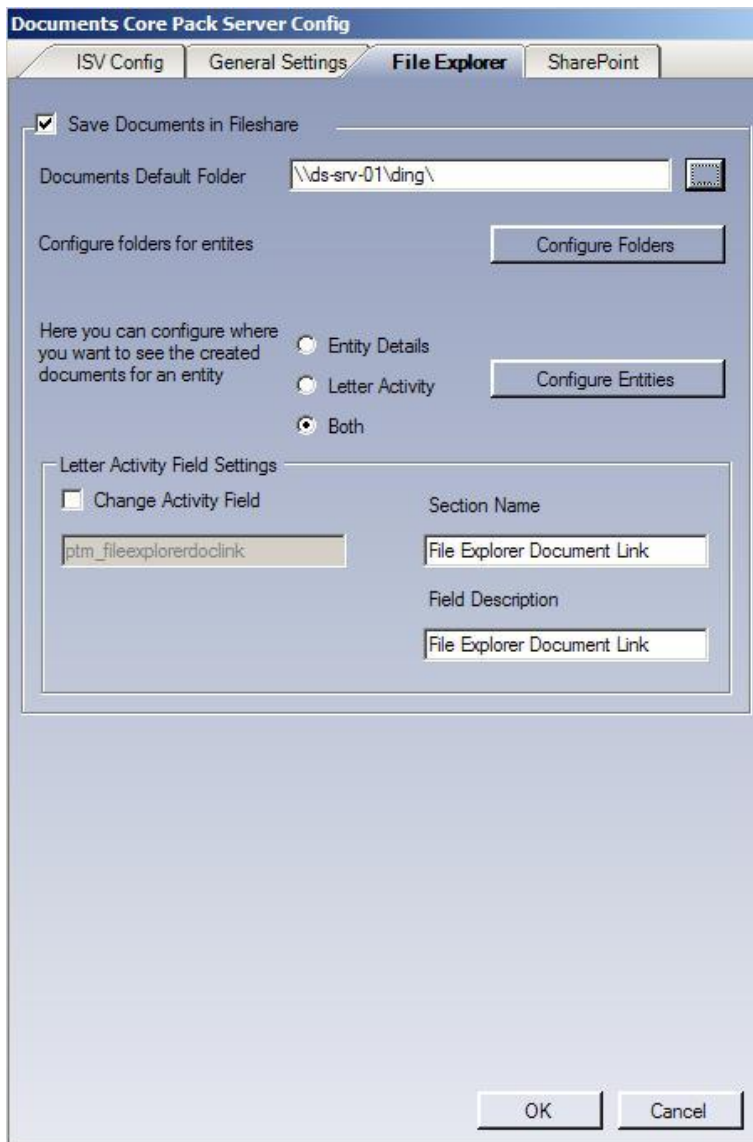
1) **<u>Save Documents in fileshare</u>**

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

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

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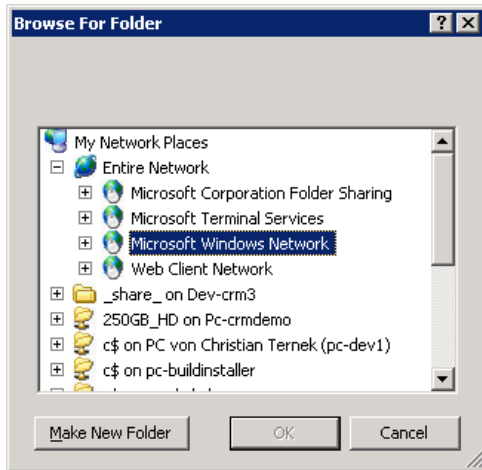
3) **Configure Folder for entities**

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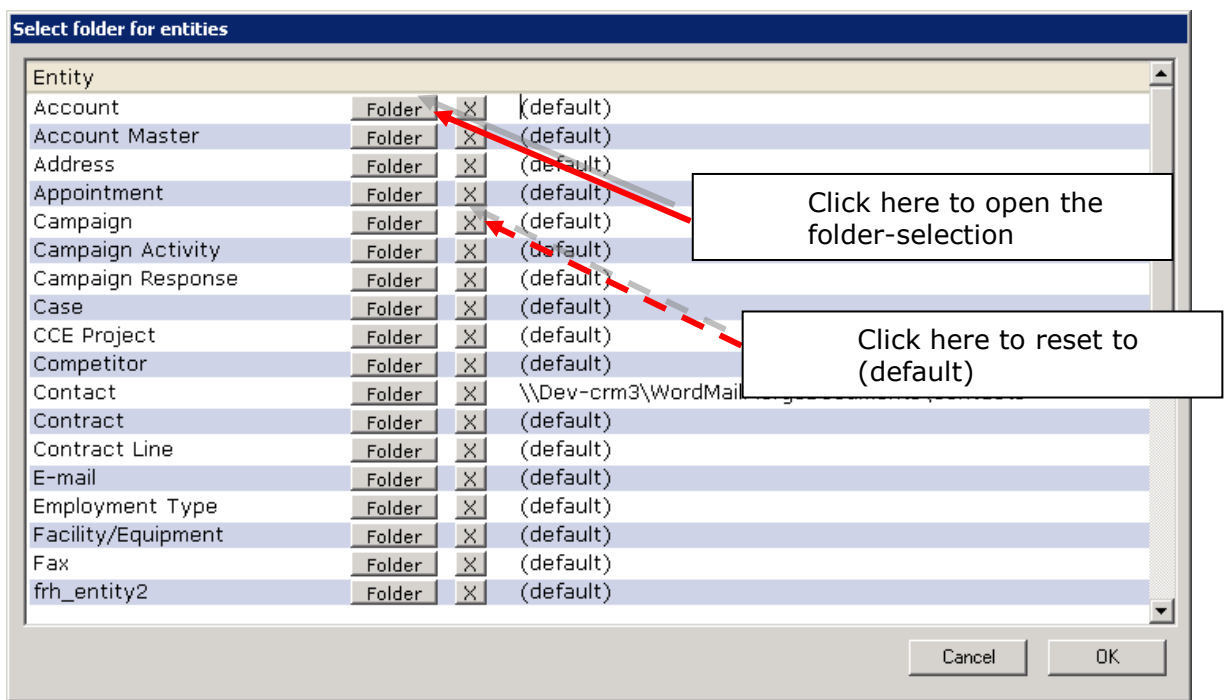
Click on [Folder] to open the Selection (e.g contact)
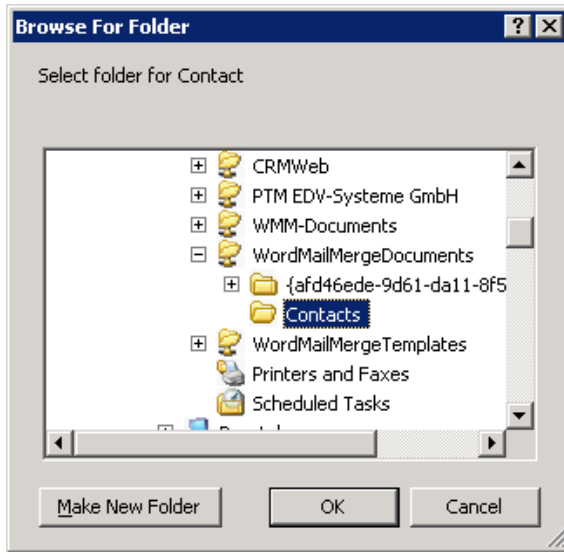
All documents for entity account will be saved to this folder afterwards.

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

4) **Display Options**

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

There are two possibilities:

- Entity Details:

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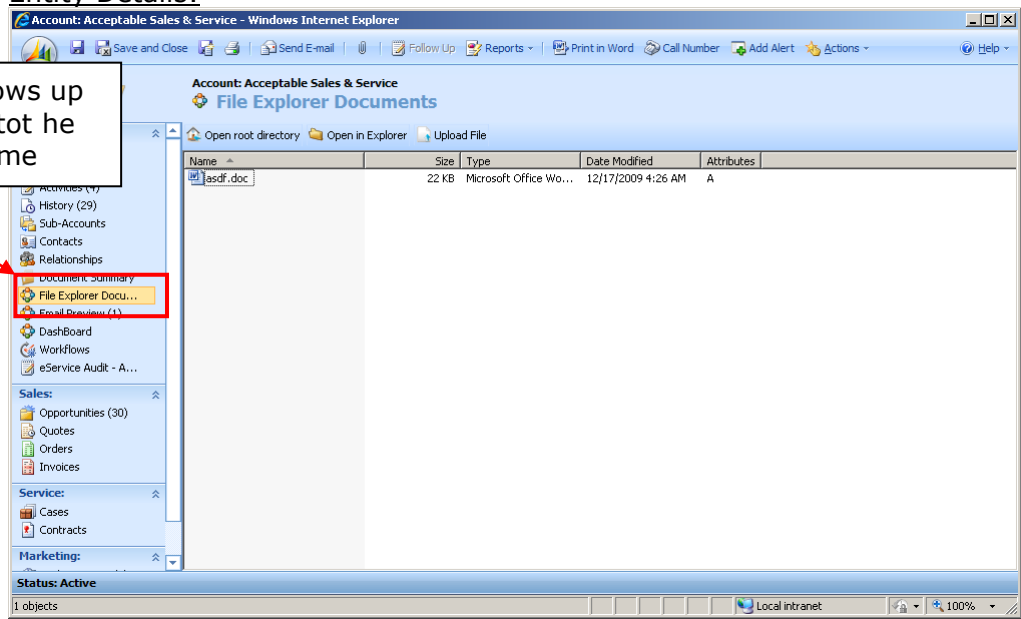
- <u>Letter Activity:</u> The created activity contains a new field which shows up the link to the document on the file share.
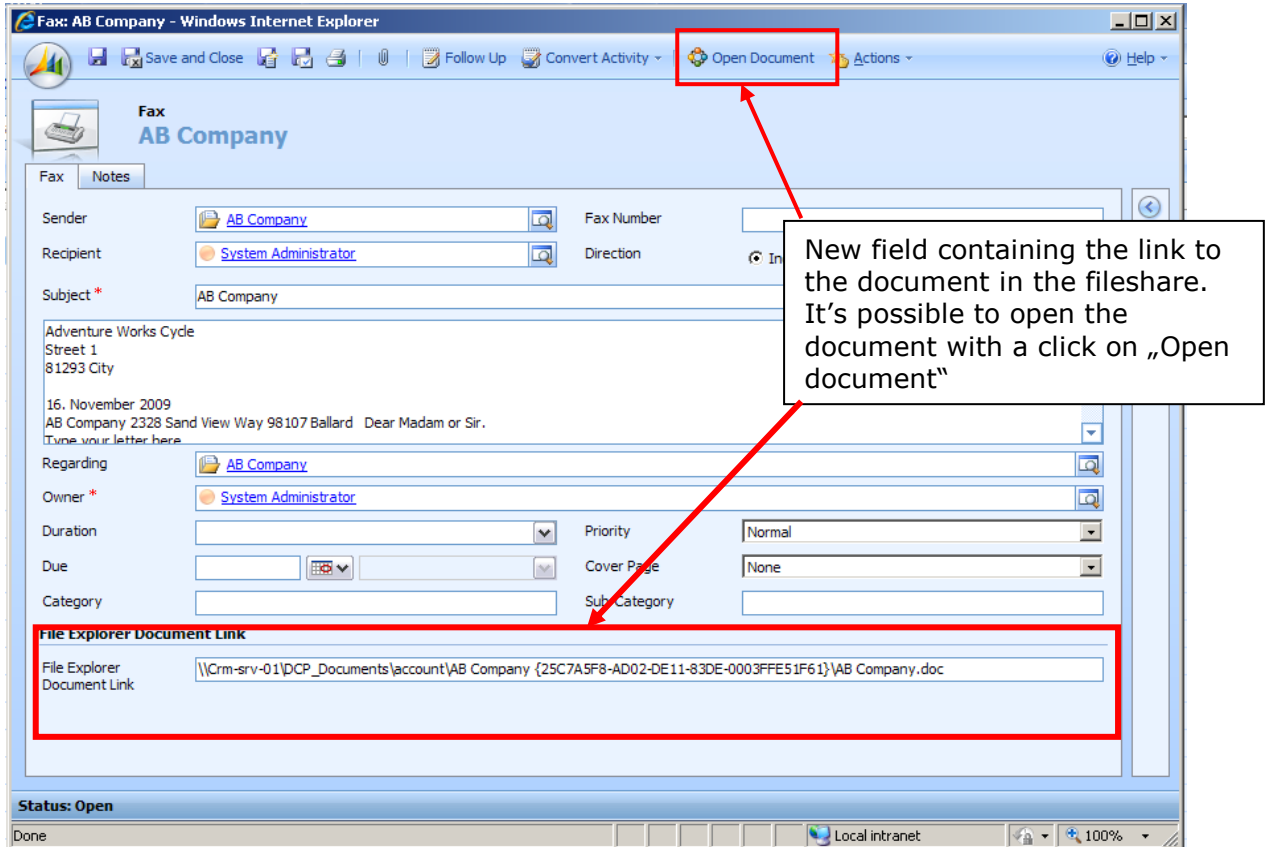
A new attribute called "*new_fileexplorerdoclink*" is defined automatically.
If you want to use another attribute, check the [change activity field] – option in the Letter Activity Field Settings.

IMPORTANT: the field specified MUST exist in CRM.

Furtheron it's possible to use both options

1.3.4 SharePoint

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

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

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

1.3.4.1 General Settings

You've two possibilities to save the documents on SharePoint.
- Save in Folders
- Save in Sites - A new SharePoint Site will be generated for each record

1) **Use SharePoint**
Choose this option to use Sharepoint. When activated the Documents Core Pack templates will be saved and loaded from the sharepoint, otherwise they will be loaded from the Documents Core Pack templates share on the server (see chapter 1.3.2)
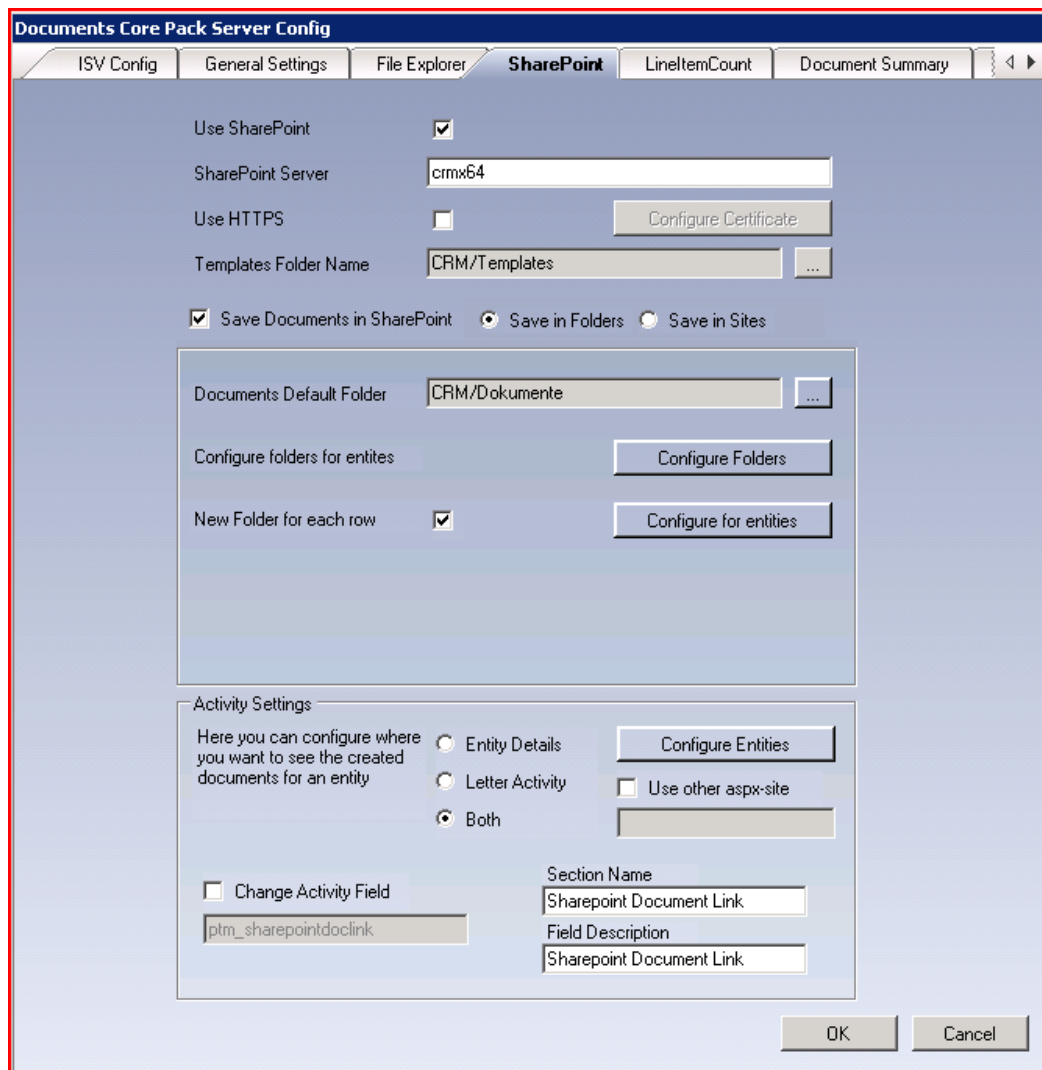
2) **Sharepoint Server**
Enter name and Port of the Sharepoint Server here. (in our case the name is danubecrm and port is 1919)
IMPORTANT: Changing the server will reset all sharepoint specific settings
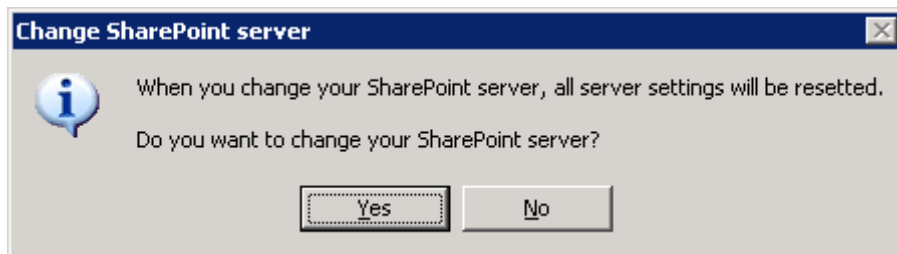
3) **HTTPS**
Check this option if you want to use https mode. You have to copy your certificate into the installation directory of Documents Core Pack Server. The file must be named "clientcert.cer"

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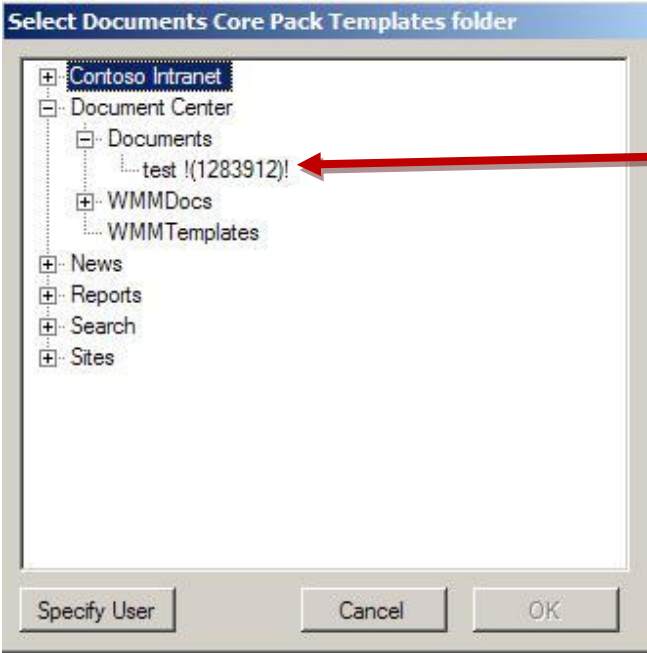
Choose the folder where the Documents Core Pack templates are located.

1.3.4.2 Save documents to SharePoint settings - Folders

Here it's possible to define how the documents should be saved to the SharePoint Folders. You have to select "Save in Folders".
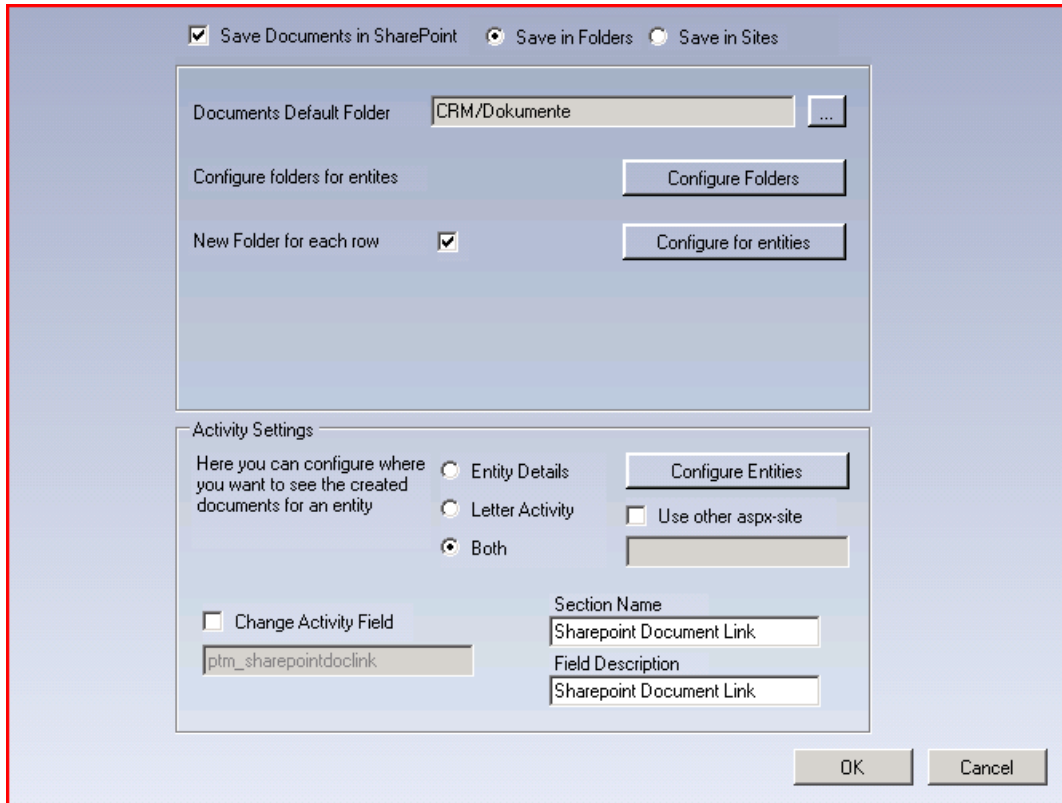
5) **Save Documents in SharePoint**

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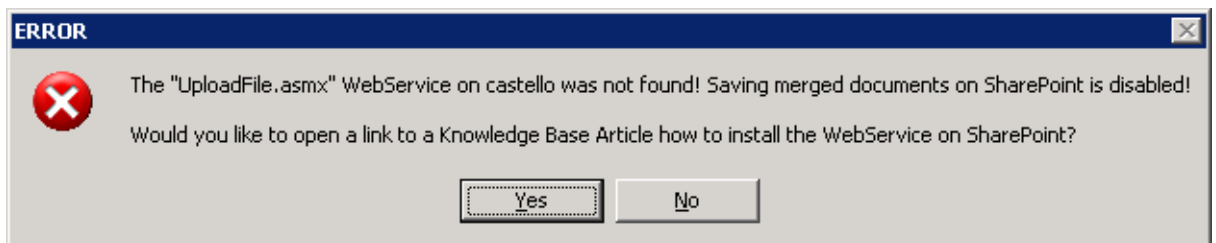
In this case you'll have to install the WMM Sharepoint services on the SharePoint
-> see KB-article:
http://support.mscrm-addons.com/default.aspx?KB=10272

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

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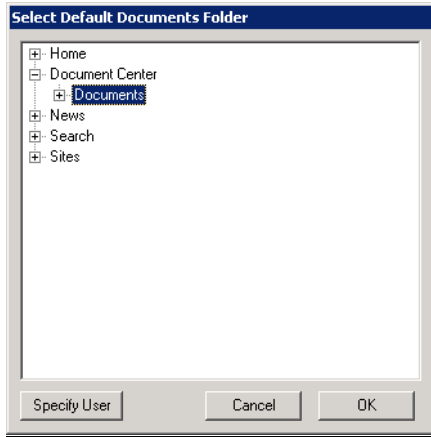
May you don't have permissions to read the existing folders, in this case you can change the user with a click on [Specify User]
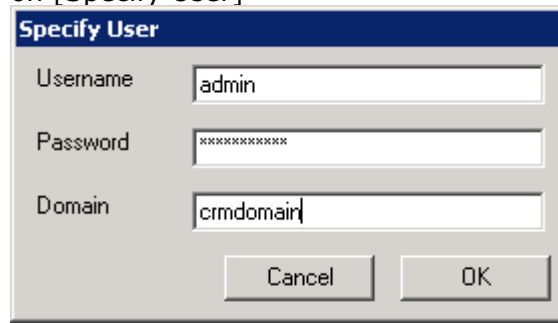
When you select a folder or list the first time, you will get following message:
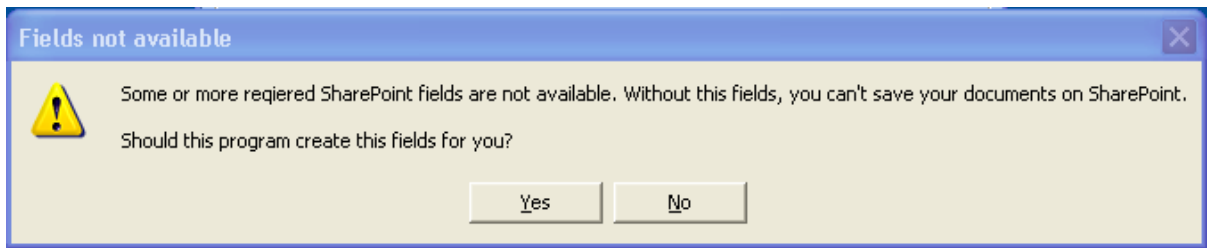
Documents Core Pack needs additional fields on the current sharepoint-list to save the merged documents. The configtool can create this fields for you or you must create it yourself.
Fields:
- ✓ Fieldtype: Text / Name: Documents Core PackGUID / Length: minimum 50
- ✓ Fieldtype: Text / Name: Documents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

7) **Configure Folder for entities**

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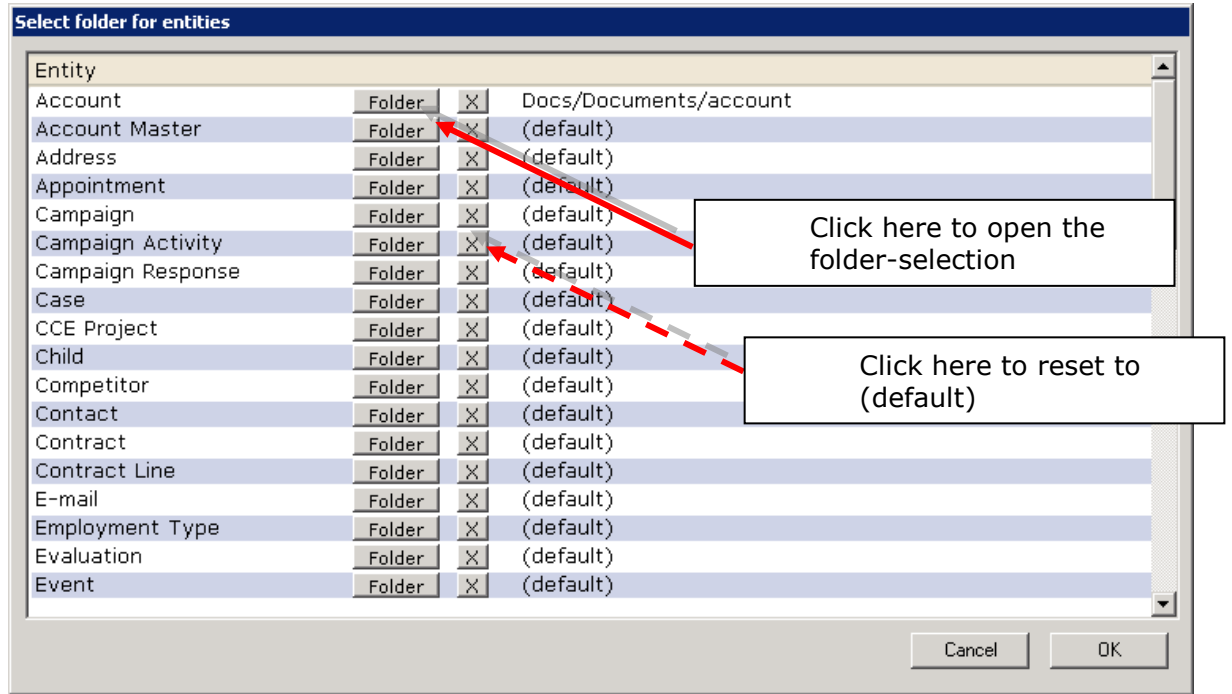
Click on [Folder] to open the Selection (e.g account)
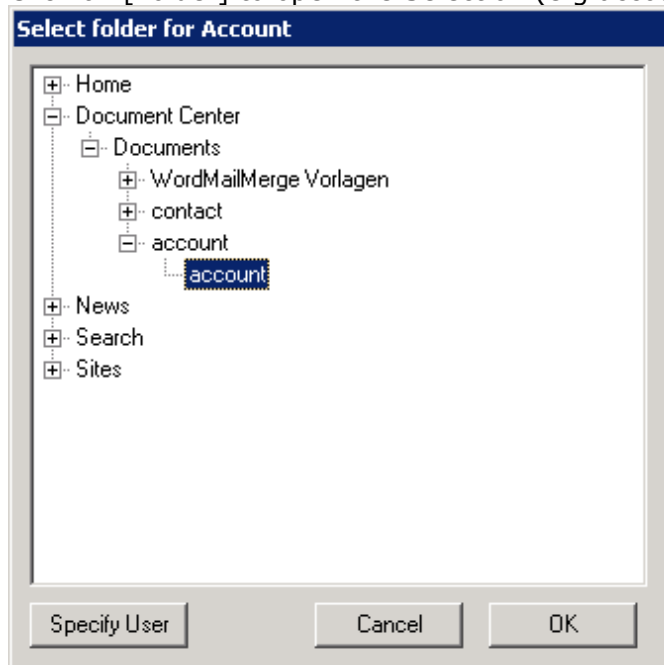
All documents for entity account will be saved to this folder afterwards.

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

8) **New Folder for each row**

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

you can set this option by default with the checkbox.

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

Options:

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

9) Visualization options

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

Basically there are two options:

- **Entity details**

    The documents will be shown within the entity details of the entities.
    A new menu option will appear in the sidebar.
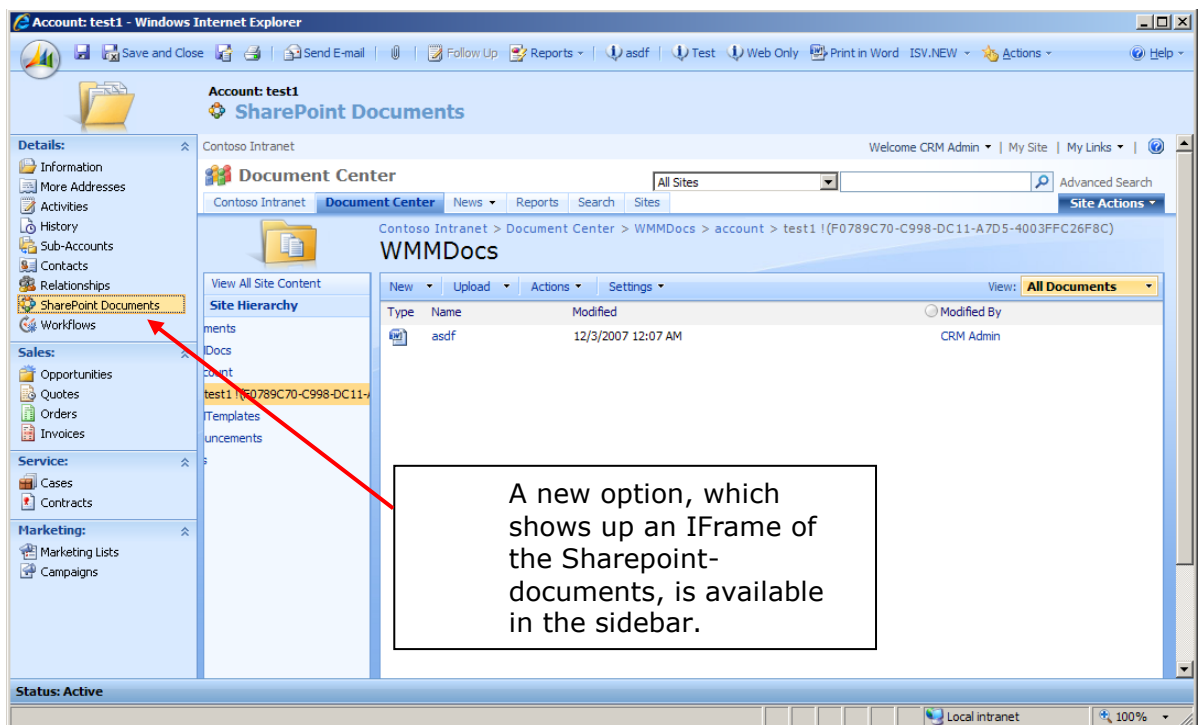
    you can specify the entities where this option should appear with a click on
    [Configure for entities]
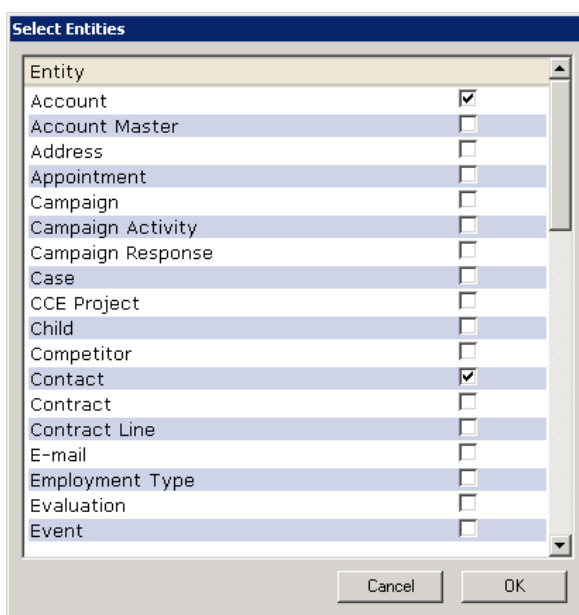
By default, the view "AllItems.aspx" is used to view your Sharepoint documents. Use the "Use other aspx-site" setting to change the default view.

- **<u>Letter activity</u>**

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

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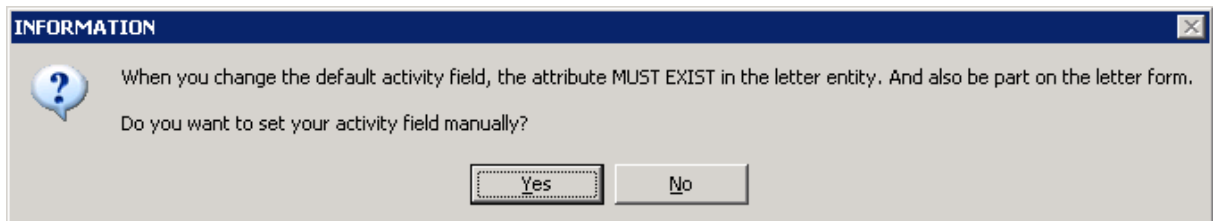
Insert the new attribute name in the textbox:
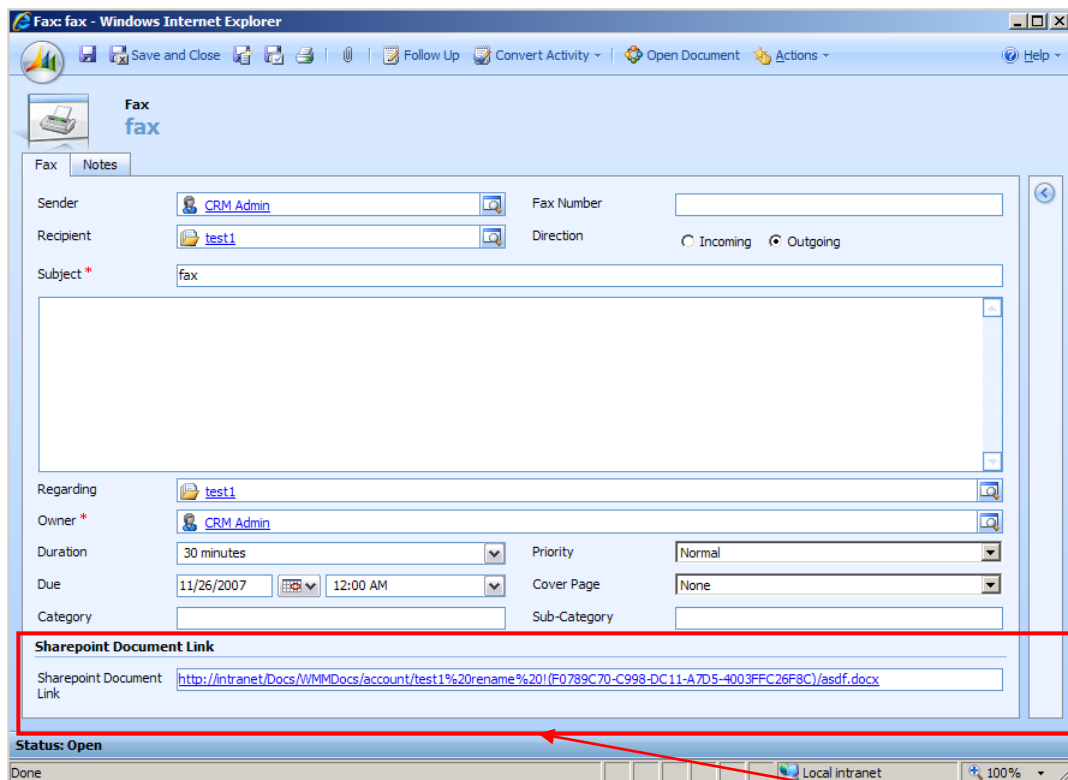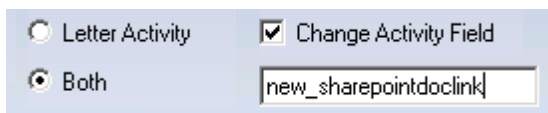
New attribute which contains the link to the document on the Sharepoint

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

1.3.4.3 Save documents to SharePoint settings - Sites

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

10) **Save Documents in SharePoint**

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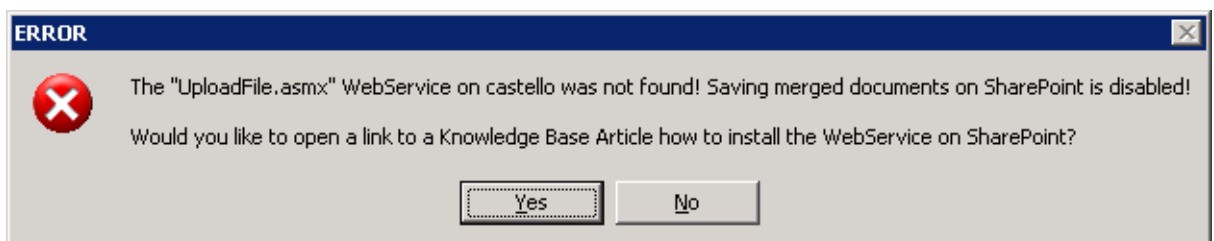
In this case you'll have to install the WMM Sharepoint services on the SharePoint
-> see KB-article:
http://support.mscrm-addons.com/default.aspx?KB=10272

Please note that you'll always need the latest version of the WebService. You'll receive a message when the version of the Service is too old.

11) **Root Site**
Specifies the default site for documents saved with Documents Core Pack

You can choose the site with a click on [...]
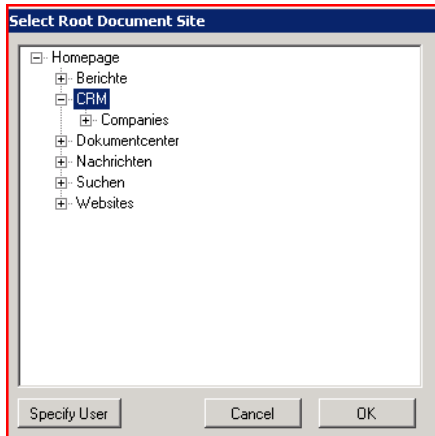
Should you not have the permissions to read the existing sites, you can change the user with a click on [Specify User]
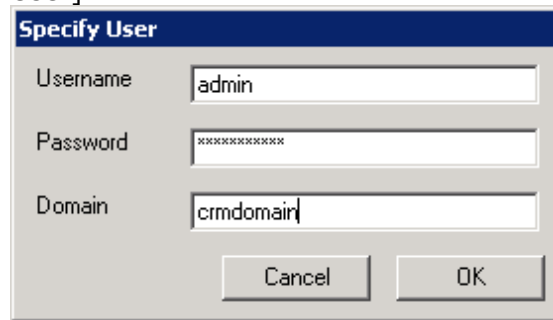
You can select any sub site or also the SharePoint root.

12) **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.

13) **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!

14) **Entity Specific Sites**

Here you can configure for each entity a specific site 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.
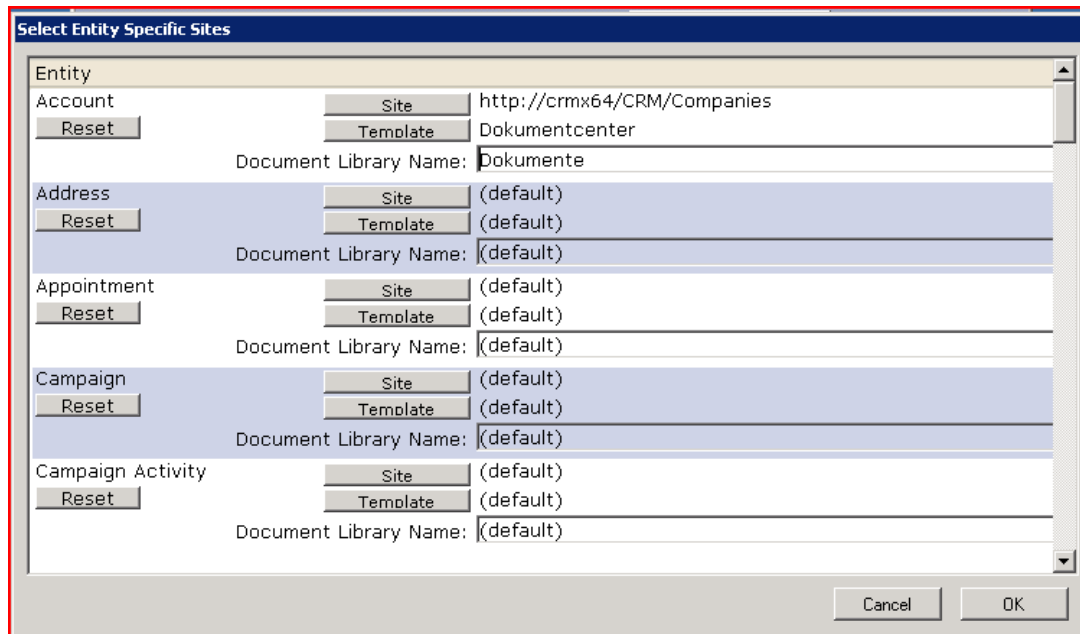
15) **Entity Relation Sites**

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 parentcustomerid. Every contact site will be created under the related account site.
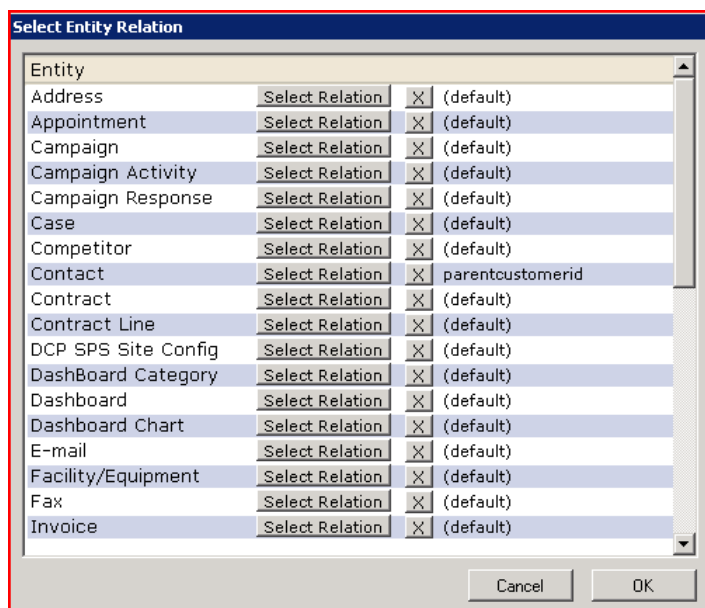
16) **Entity Site Name**

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 in this settings, that this name should be e.g. "Contacts"
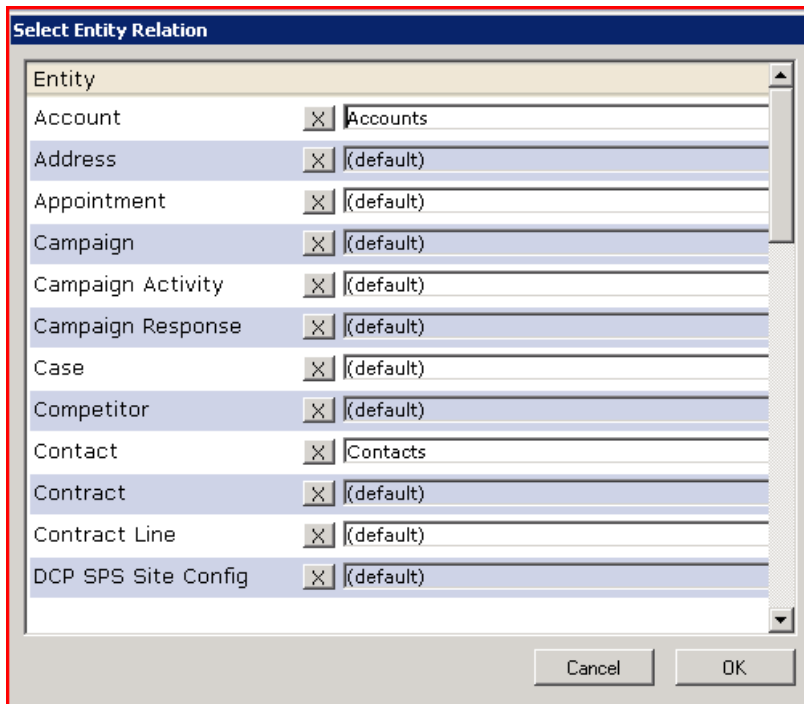
1.3.5 LineItemCount

1.3.5.1 General

LineItemCount sums are all related to records of the open entity. This adds the result to the end of the fitting menu name. You can see the record-sum of every menu entry without clicking on it. LineItemCount can be used for each entity. In the case of the account entity it would look like this:
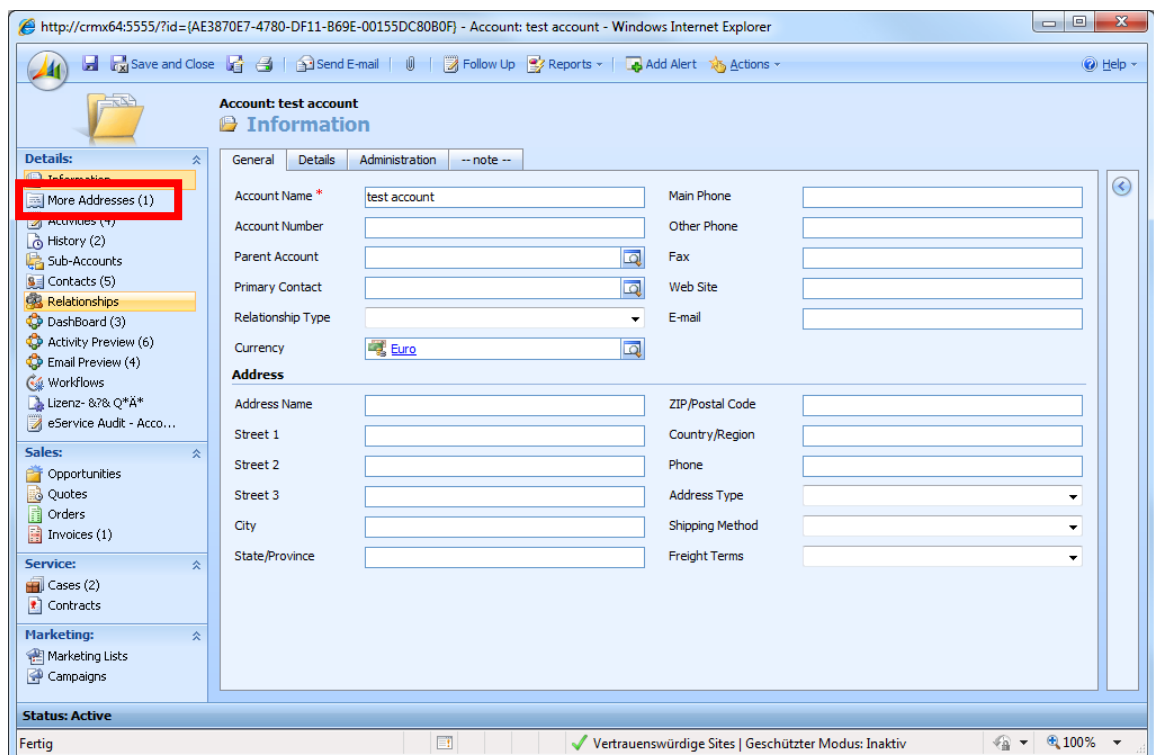
For example the entry "More Addresses (1)" means that this account owns one "More Addresses"- record.

1.3.5.2 Settings

For the LineItemount configuration use the "Documents Core Pack Server Config" and navigate to the "LineItemCount"-tab. In this view, you can set up basic settings.

- **„Use LineItemCount":** This checkbox is used to enable or disable the whole LineItemCount. If unchecked, the tree view is minimized and all checkboxes are deactivated (All settings will be lost).
- **„Select All":** By clicking on this button, all the checkboxes of the tree view will be checked. The LineItemCount will be activated for all possible entities and entries.

- **TreeView:** Includes all entities of your CRM system and is subdivided into three levels.
  - First node (highest level): The name of the node represents the same-named entity. If such a node is checked, LineItemCount for all menu entries of this entity will be executed.
  - Second node (second level): The name of these nodes represents the same-named menu entry on the left side of CRM. This node-type is used to set more detailed settings. Activate a checkbox to enable LineItemCount for this entry.
  - Third node (third level): Should this kind of checkbox be enabled, LineItemCount will add up all records of the entry. Otherwise only the direct-related ones are used.
- **„Configure LineItemCount":** A click on this button will open a new window. This is described in the "LineItemCount-Configuration Tool"-section.
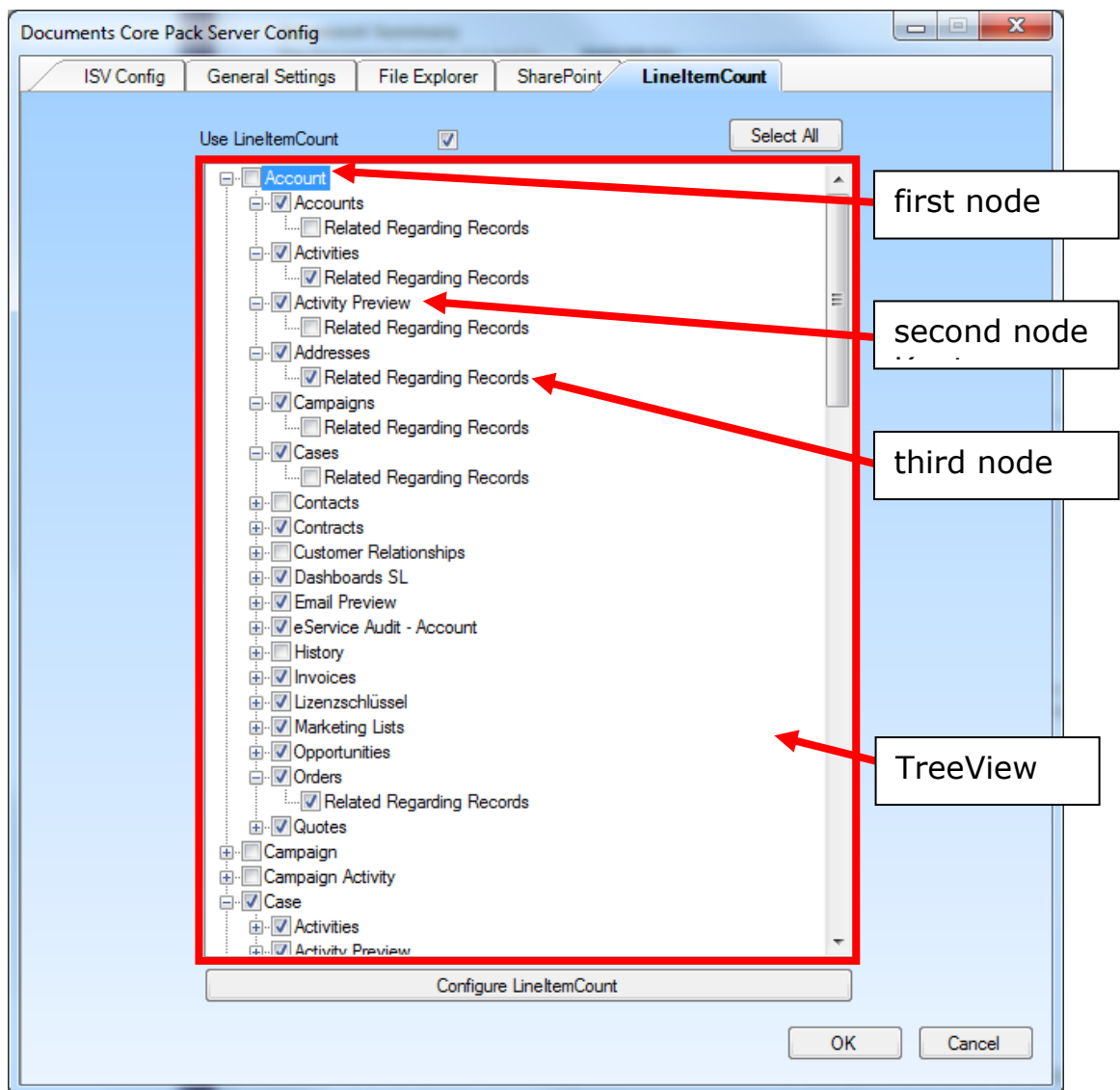
In this example you can see how the entity account is configured. LineItemCount is enabled for all CRM-entries except for history, contacts and customer relationship. Only the addresses, activities and salesorders include expanded related records. I.e: a contact has an activity and this contact is related to an account, the activity will be counted in the account's activities).

1.3.5.2.1 LineItemCount – Configuration Tool

LineItemCount is configured for all system and custom-entities which are linked by a 1:n –relationship. All entities linked by custom n:n-relationships will have to be configured manually. This tool was developed for exact this reason. Our tool can also be used to change existing LineItemCount-settings of all your entities.

Important: Before you can use the tool, at least one entity has to be checked.
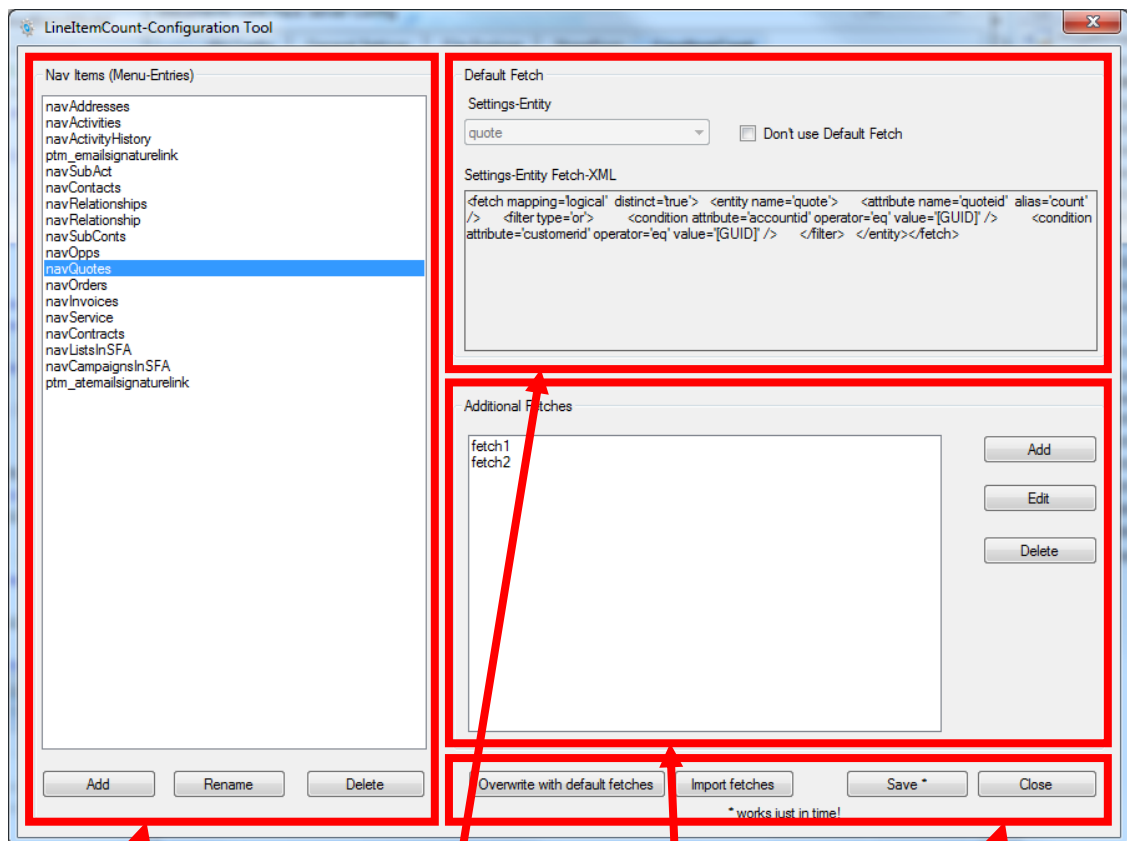
a) Nav Items (CRM – menu items)

b) Default Fetch

c) Additional Fetches

d) General Area

a) Nav Items: This area manages the navigation items (menu items in CRM). The list includes the html-names of all menu items for which LineItemCount is configured. For Example the list-entry "navQuotes" represents the entity "quote".

Buttons:

- Add: Adds a new entry to the list.
- Rename: Used to modify existing entries.
- Delete: Deletes the selected entry.

Important: By clicking these buttons, actions are performed immediately without a warning window. However, the changes are not saved until the button "Save" in the "general area" is pressed.

b) Default Fetch: In this area the default-fetch of the selected navigation-entry is shown. It counts all records which are directly related with the calling entity. It is not possible to delete or edit the default-fetch, but can you disable it by checking the "Don't use Default Fetch"-checkbox.

c) Additional Fetches: These fetches, count all records which are not directly related to the entity (like recursive relations and so on). Here you can also add user-defined fetches.

Buttons:
- Add: Opens a blank screen to add a new fetch to the selected navigation-entry. Use the text area under "Fetch-XML" to place the new fetch. In the text field underneath "Fetch-Type" fill in the entity-type-codes (unique number of the entity) of the entities for which the fetch should be used. If you don't insert a number, the fetch will be executed for all possible entities. To add the fetch to the list click on the "ok"-button.
- Edit: Opens the selected fetch in a new window to be modified.
- Delete: Deletes the selected fetch.

Wrong fetches will be ignored!

In the following example the navigation-entry "navQuotes" (html-name for quotes) recieves a new fetch. If the field "Fetch-Type" was blank, the fetch would be executed for all possible quote-menu items (quote is available in account, contact, opportunity and so on). But due to the fact that the text field includes a 1 (entity-type-code for account) the fetch only will be executed for the quote-menu item in account's menu bar.
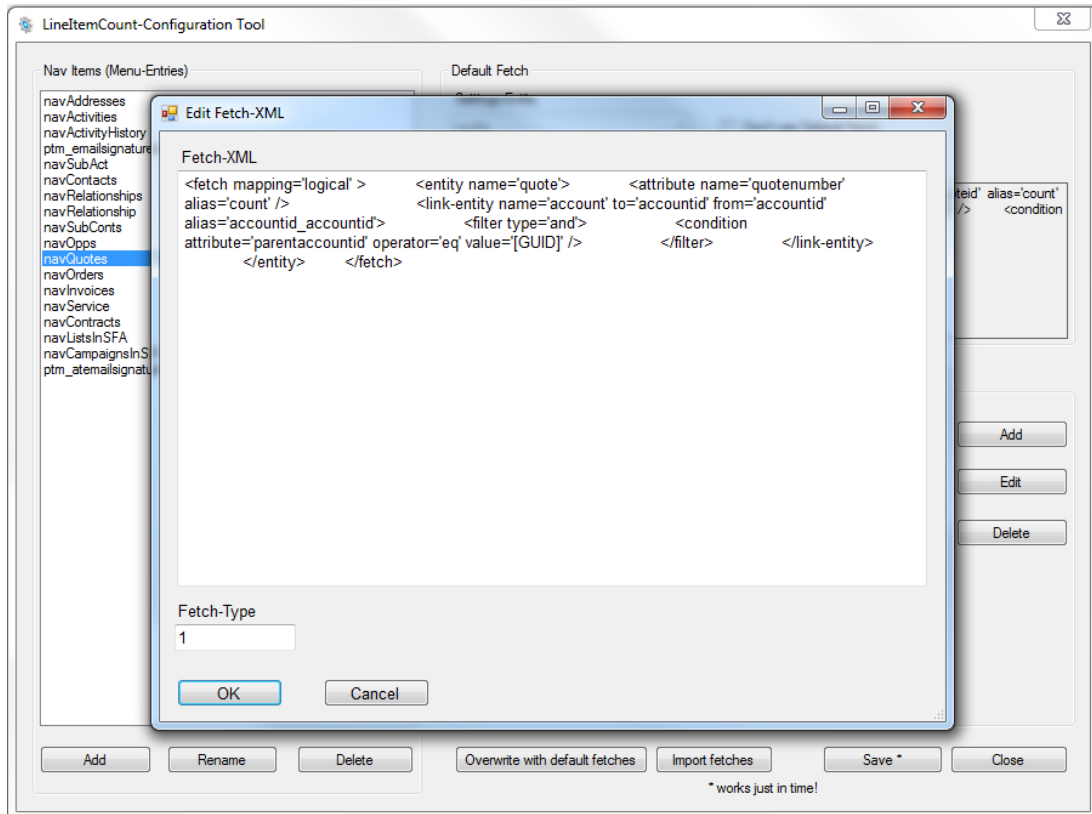
d) General Area: All buttons in this area are effective for the entire window.

Buttons:
- „Overwrite with default fetches": Default Values will be restored. You have the chance to save the current configuration before it is overwritten.
- "Import fetches": imports an optional NavigationItemes-XML-file (settings file) and overwrites the current one.
- "Save": Saves all settings of the entire Configuration Tool. The changes are immediately effective. So you can test your settings without having to reboot.
- "Close": Closes the configuration tool (after confirmation).

1.3.5.3 Set up LineItemCount for custom relations:

Only related entities can be shown in the menu of another entity. If the relation type between them is 1:n choose "the 1:n-option". Otherwise if the entities are linked by a n:n-relationship, follow the instructions about the "n:n-option".

1:n-Option: Start „Documents Core Pack Server Config" and navigate to the "LineItemCount"-tab. You'll find your custom entity as a sub-note of the main-entity. After checking it, the LineItemCount for the entity will be configured by itself.
On the next start of "Documents Core Pack Server Config" you can use the Configuration Tool to add additional fetches to your custom-entity. The navigation-entry-name is made up of "nav_" + the relation name of the two entities. But it won't be necessary in the most cases.

n:n-Option: It's not possible to set up custom n:n-relations by using the tree view! Instead you have to use the Configuration Tool. First, add a new navigation-item to the list in the Navig Item-area. To find out the right name for the entry, just follow these instructions:
- Open a CRM-record in the menu in which the related entity appears.
- By pressing the F12-button (or Extras -> Developer Tools) the Developer Tool will appear.
- Click on the cursor in the upper left area of the tool.
- After that switch back to CRM and click on the menu item (for which LineItemCount should be configured).
- The html-code of that menu item will be highlighted and displayed in the Developer Tool.
- Now you only have to search through the highlighted selector for the attribute "id". The value of the "id" is the name of the entry.

Furthermore select this entry and add your own fetches in the "Additional Fetches"-area. By clicking the "save"-button all setting will be saved and the configuration is completed.

Important: If you add custom fetches, make sure that these include the attribute id. For example, if you want to expand an account, "attribute name='accountid'" must be included.

1.3.5.4 System requirements:

JavaScript must be enabled in Internet Explorer.

1.3.6 Document Summary

With the Document Summary you have the possibility to view the File Explorer or
SharePoint Documents from related entities. So you have to configure SharePoint
or File Explorer before activating the Document Summary.
E.g. you have an account with 5 related contacts. Instead of open up every
contact and open "File Explorer Documents" or "SharePoint Documents" of each
one, you can use the Document Summary to view the documents of the contacts.
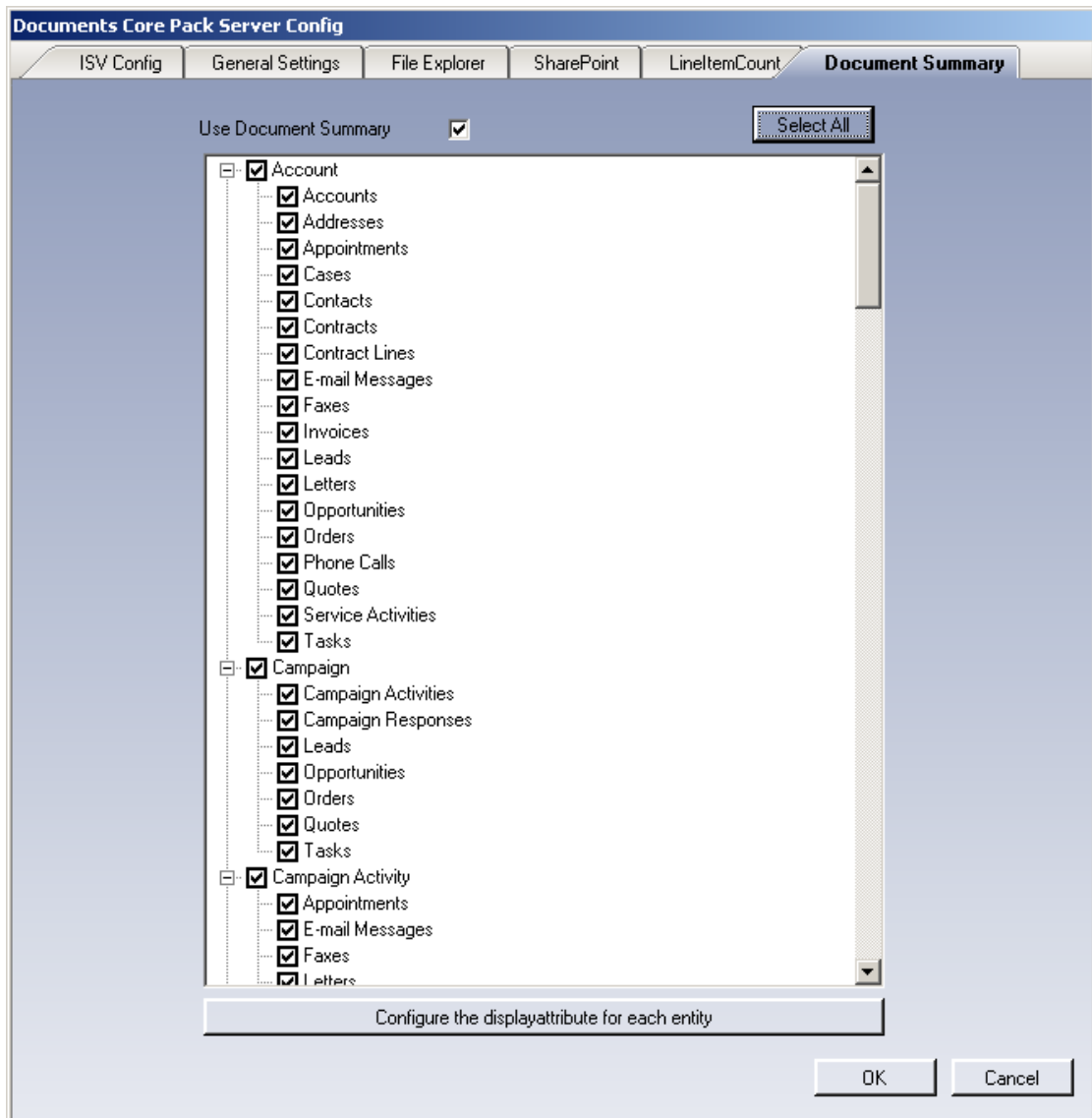
The first level of the tree indicates on which entity you want to see the Document
Summary. And the second level of the tree indicates, which related entities you
want to see. You could only select 1:n relations.

After activating the Document Summary, you'll see a new navigation item on the entities you selected in the first tree level.
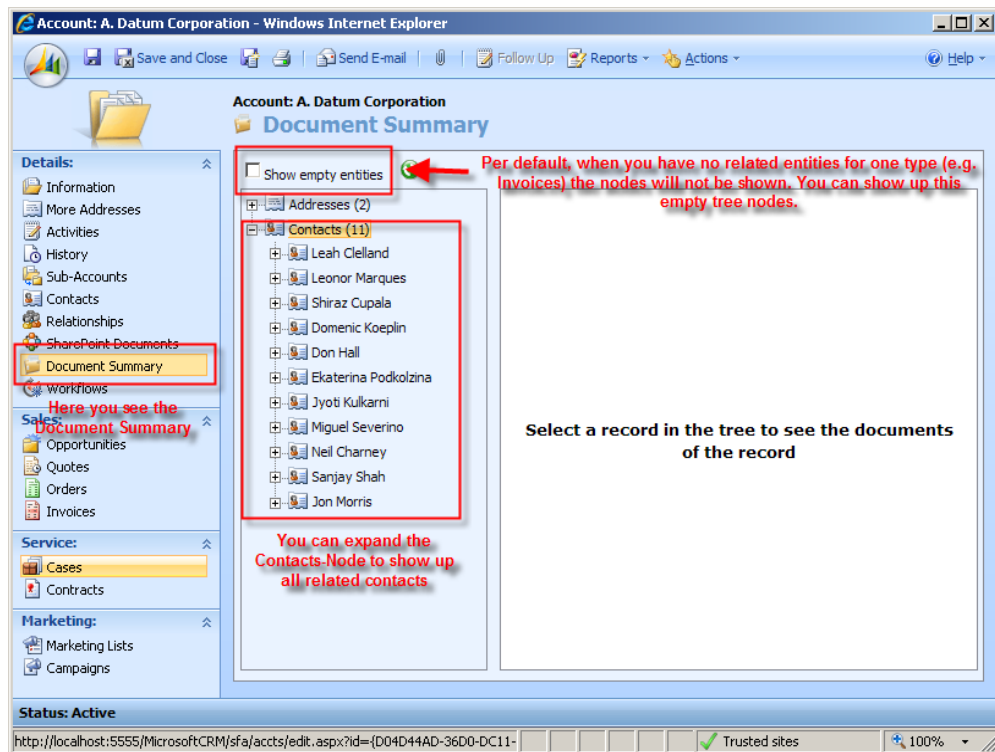
You can click on a contact to see its (File Explorer or SharePoint) documents. It basically shows the same as when opening the contact directly and click on "SharePoint Documents" or "File Explorer Documents".

You have also a right click menu on each node. You can open up the entity or expand/collapse the tree.
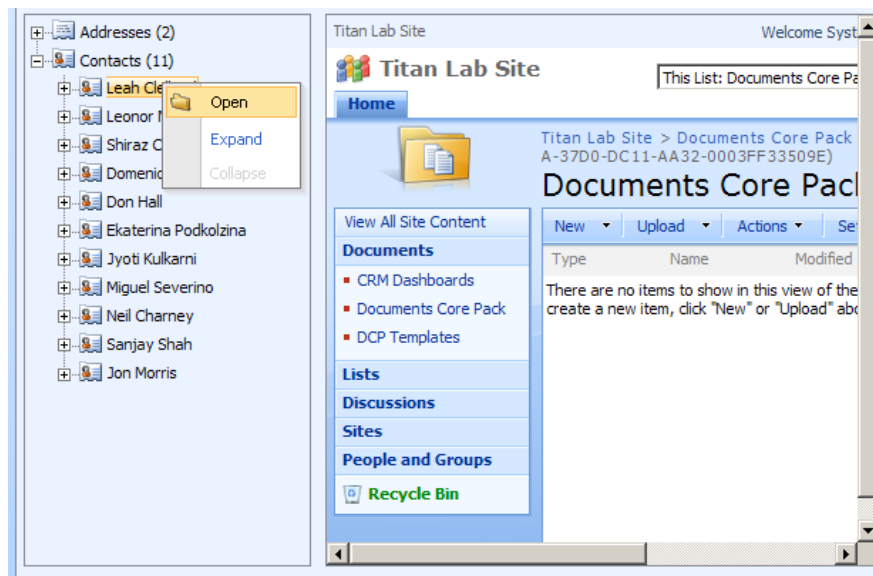
The tree is recursive. This means, that you can expand the tree downwards till you don't have any related entities. E.g. open an account, expand the contacts, expand the invoices of a contact and so on.

1.3.7 Advanced settings
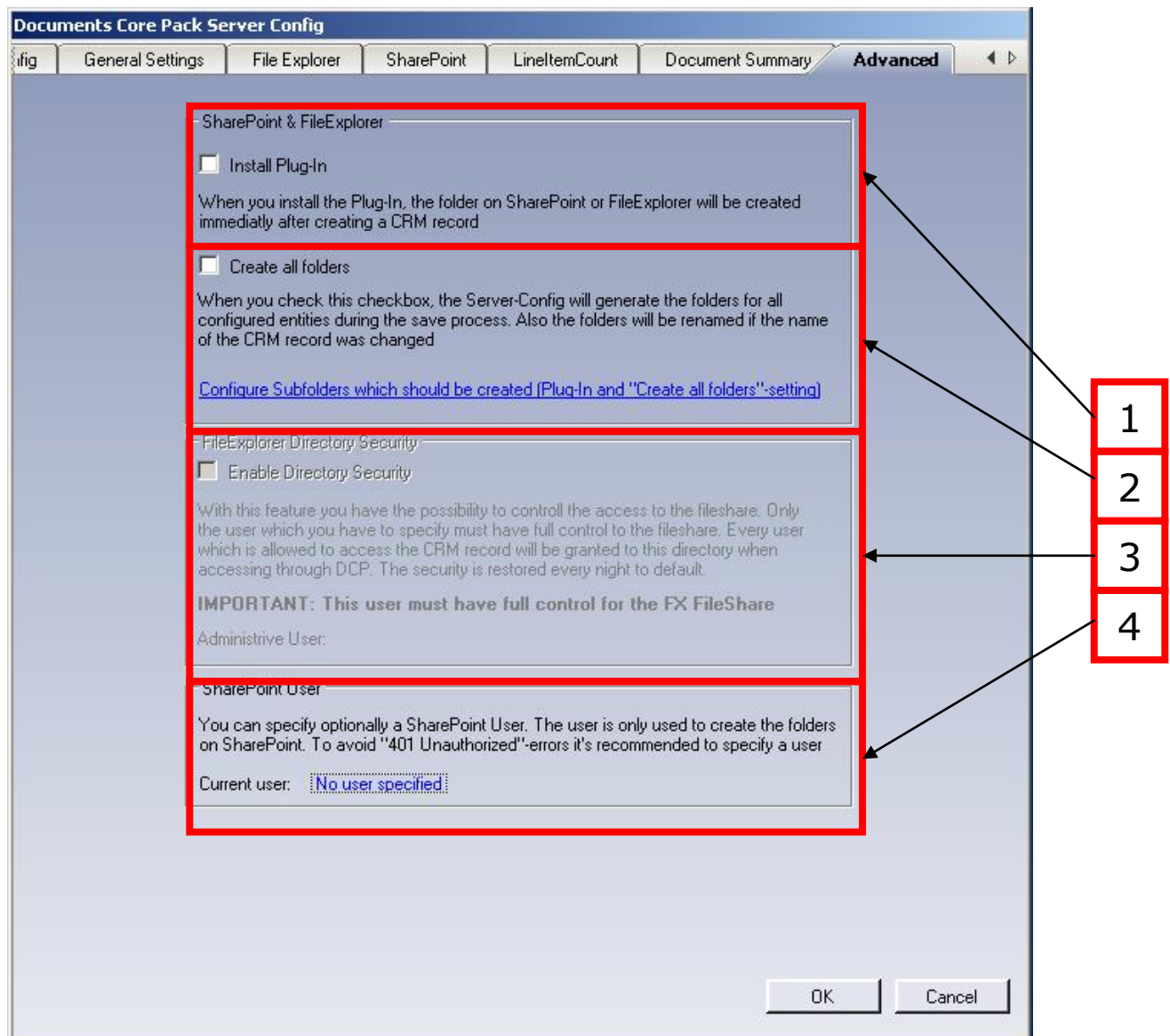
1) **Install Plug-In**
   When you install the Plug-In, the folder on SharePoint or FileExplorer will be created immedialty after creating a CRM record.

2) **Create all folders**
   When you check this checkbox, the Server-Config will generatet he 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 fileshare. Only the user whitch you have to specify must have full control to the fileshare. Every user which is allowed to access the CRM record will be granted to this directory when accessing through DCP. The security is restored is restored every night to default.

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.

1.4 Installing the client component

1.4.1 Prerequests

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

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

In order to run Documents Core Pack without being prompted, follow the steps below.

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

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

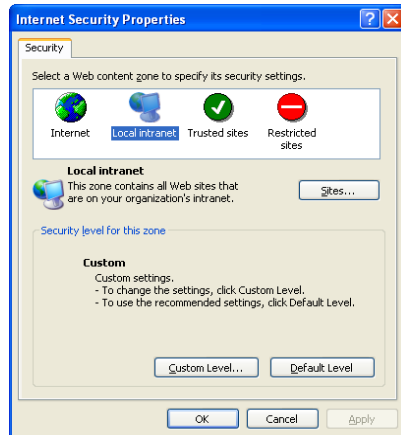Example of the Zone Settings:

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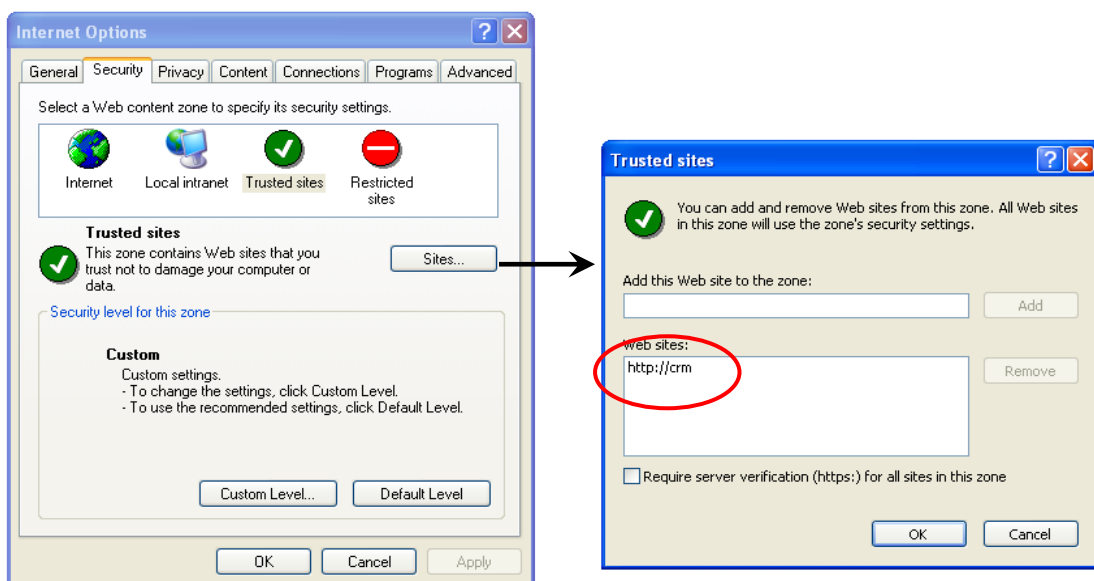
Please enter your crm-site to this list on every client!

Setup Internet Explorer to allow the Documents Core Pack ActiveX controls to run:

4. Double-Click on the **Zone Setting Icon** (Local Intranet in this example). The following dialog box will appear:

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

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

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

1.4.2 Installing Documents Core Pack Client

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

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

Install the component on the client:

1. Run the "Documents Core Pack Client for MS CRM 4.0.msi" Setup file. You will see following window:

Click Next ->

2. End User License Agreement(EULA)

3. MSCRM Server

Enter on this page the Name of the CRM Server.
This is the name you enter in the Internet Explorer(without http://).
Also enter the port number if it is not standard. (see 1.7.1)

Click "OK" ->

4. Select Installation folder
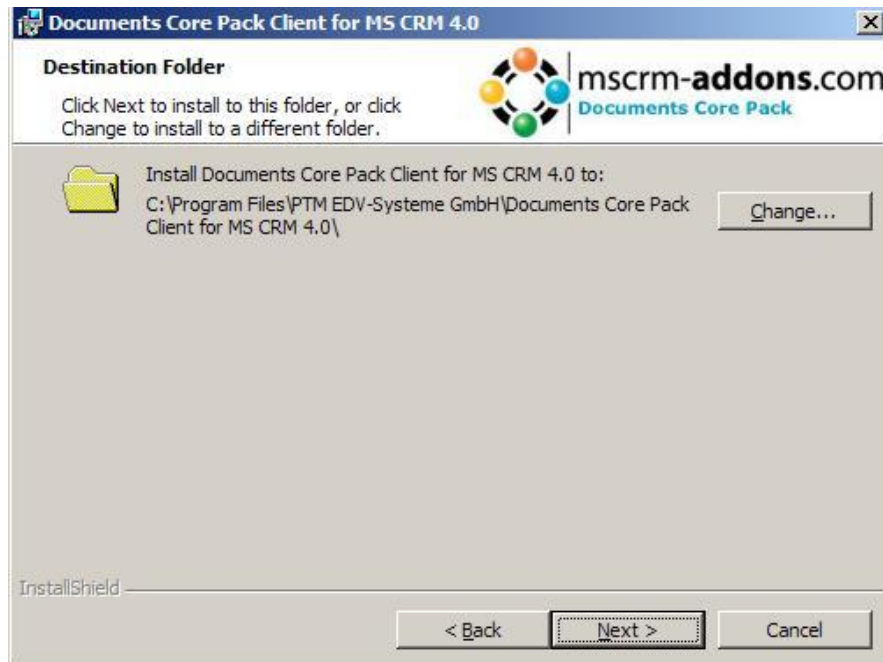
Click Next ->

5. Confirm Installation
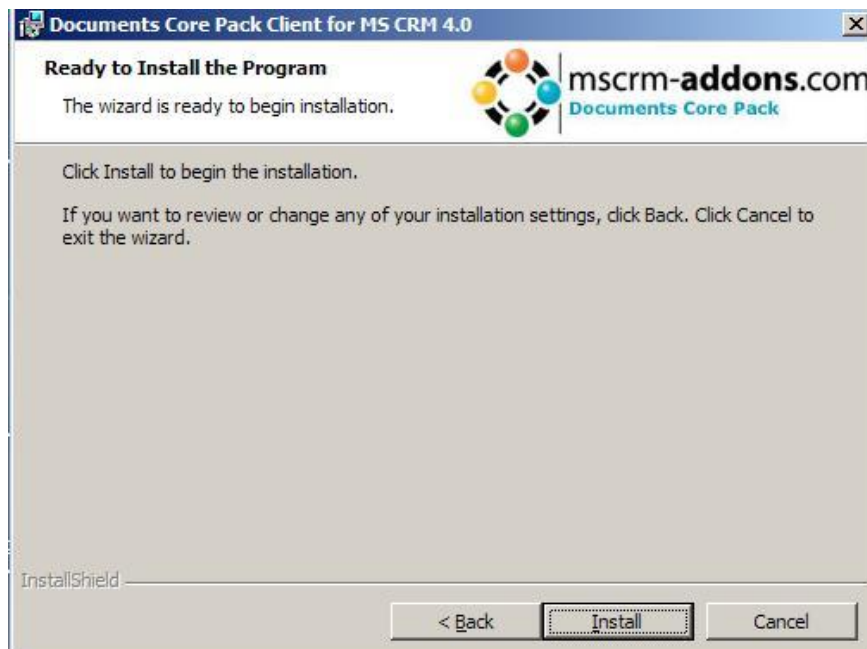
Click Install->

6. Choose the language you want to use and click OK
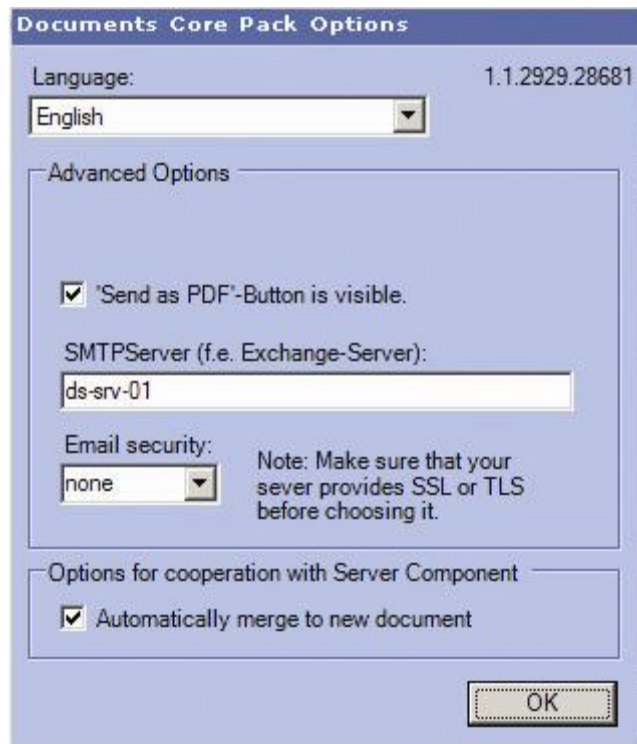
7. After the installation ended go to your MS Word and you will see following new Toolbar with the Buttons "Documents Core Pack for MS CRM", " Choose CRM Data", "Create CRM activity" and the optional buttons "Send as PDF" and "Get My Data":
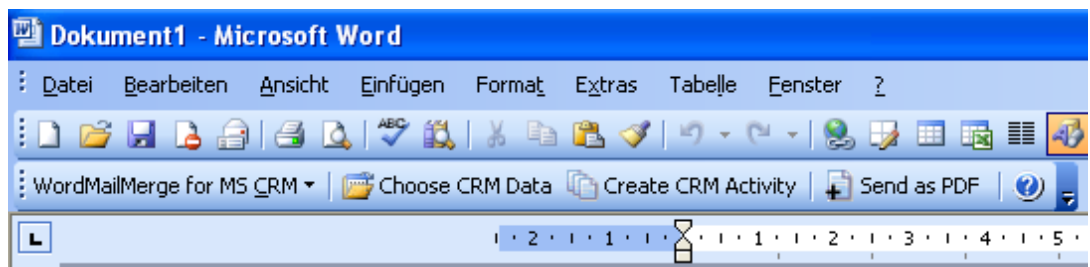
1.4.3 Installation on a Terminal Server

To install Documents Core Pack on a Terminal Server, you must open the Control Panel, then open the Add/Remove Programs-option and 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.
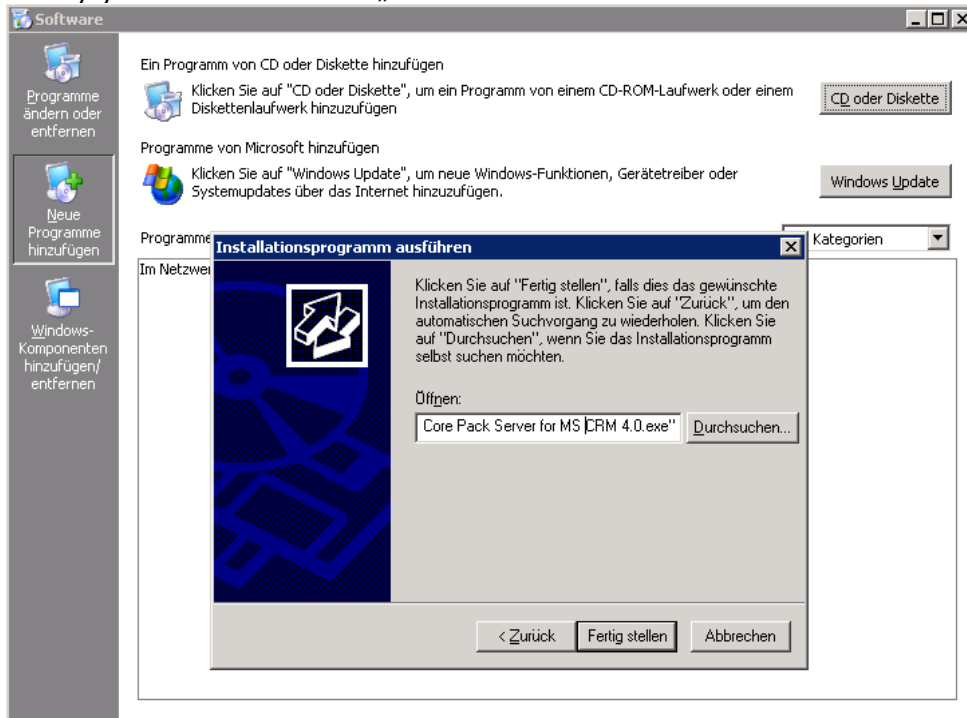
You will see following window:
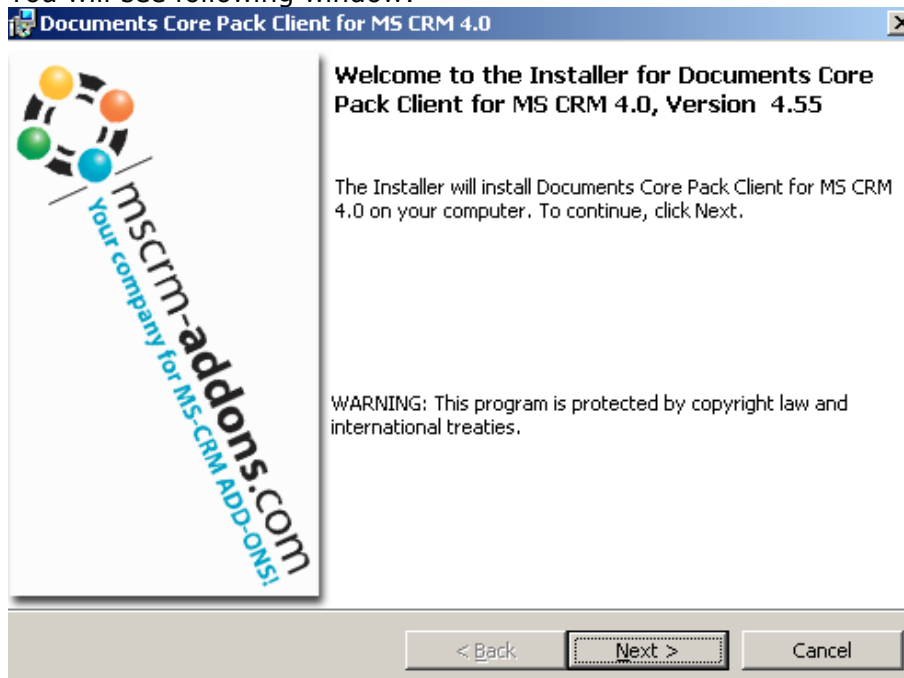
Click „Next"

End User License Agreement (EULA)

Select Installation folder
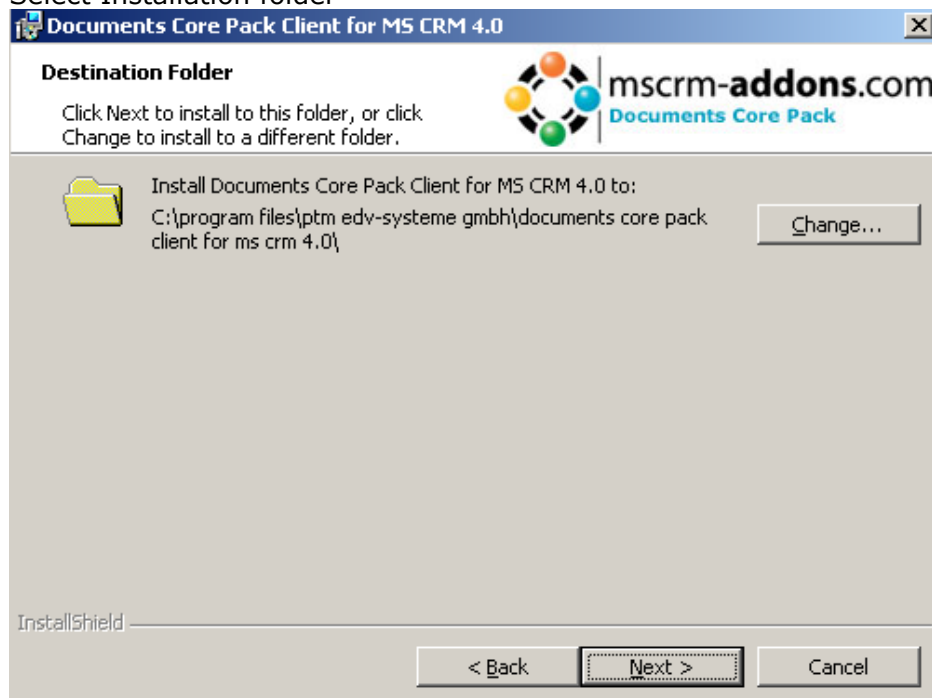
Click „Next"

Confirm Installation
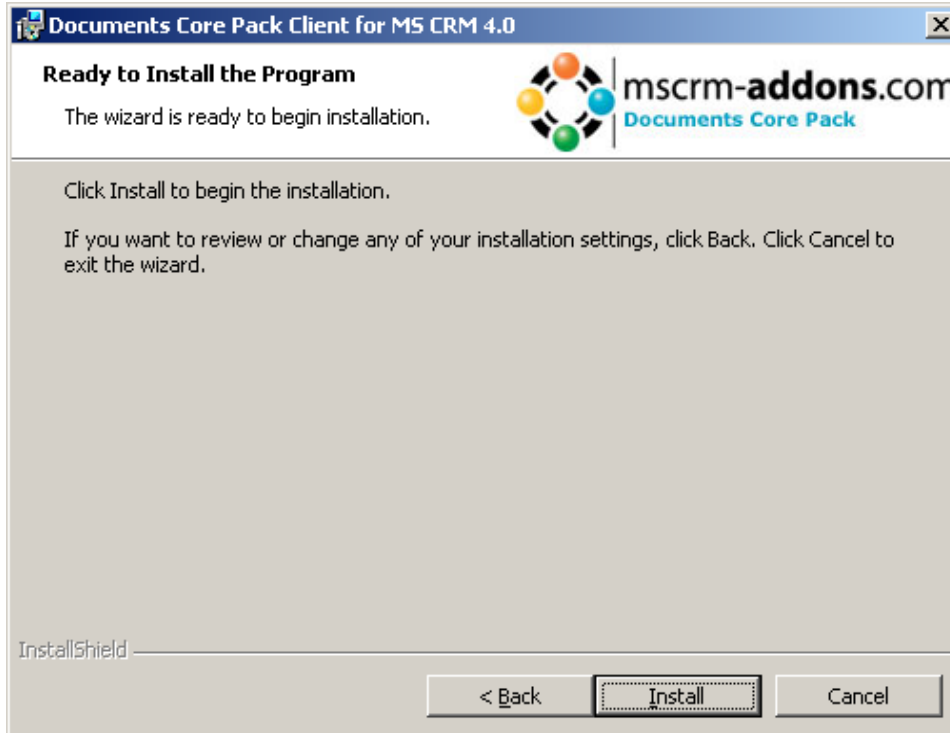
Click „install"

In the connection-dialog you have to enter the CRM servername with the port.
(eg : servername : crm, port : 5555)
When installing on Terminal Server, you have to change to the administrator-view
and specify a user and a profile.
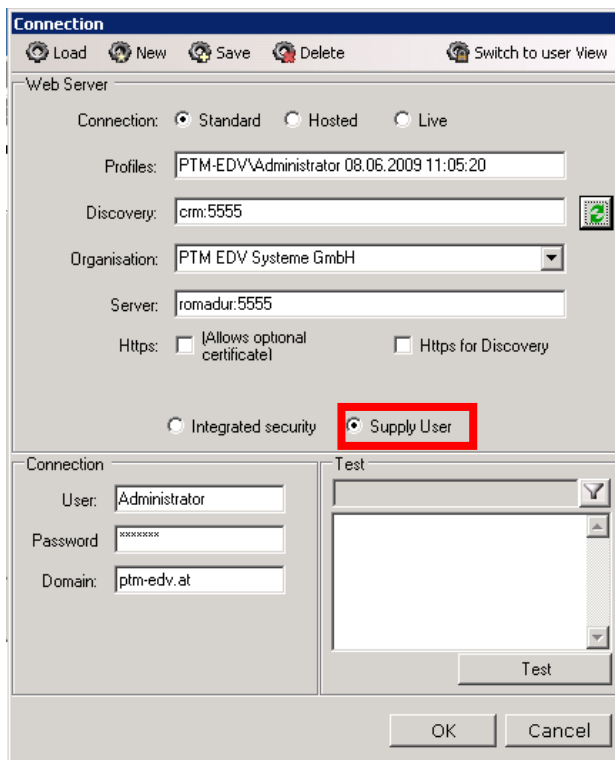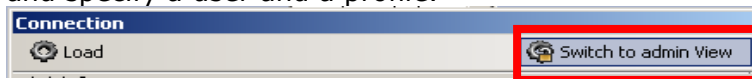
IMPORTANT: Finally you have to change a registry entry to use integrated security.

Start > Run > „regedit"and browse to "HKEY_LOCAL_MACHINE\SOFTWARE\PTM EDV-Systeme\ and choose the configured profile (you can see the profile used in the HKLM\SOFTWARE\PTM EDV Systeme\Wordmailmergeclient\ActiveProfile setting)

The regarding entry is called „**CrmUseIntegratedSecurity**". Change the value to „**true**"
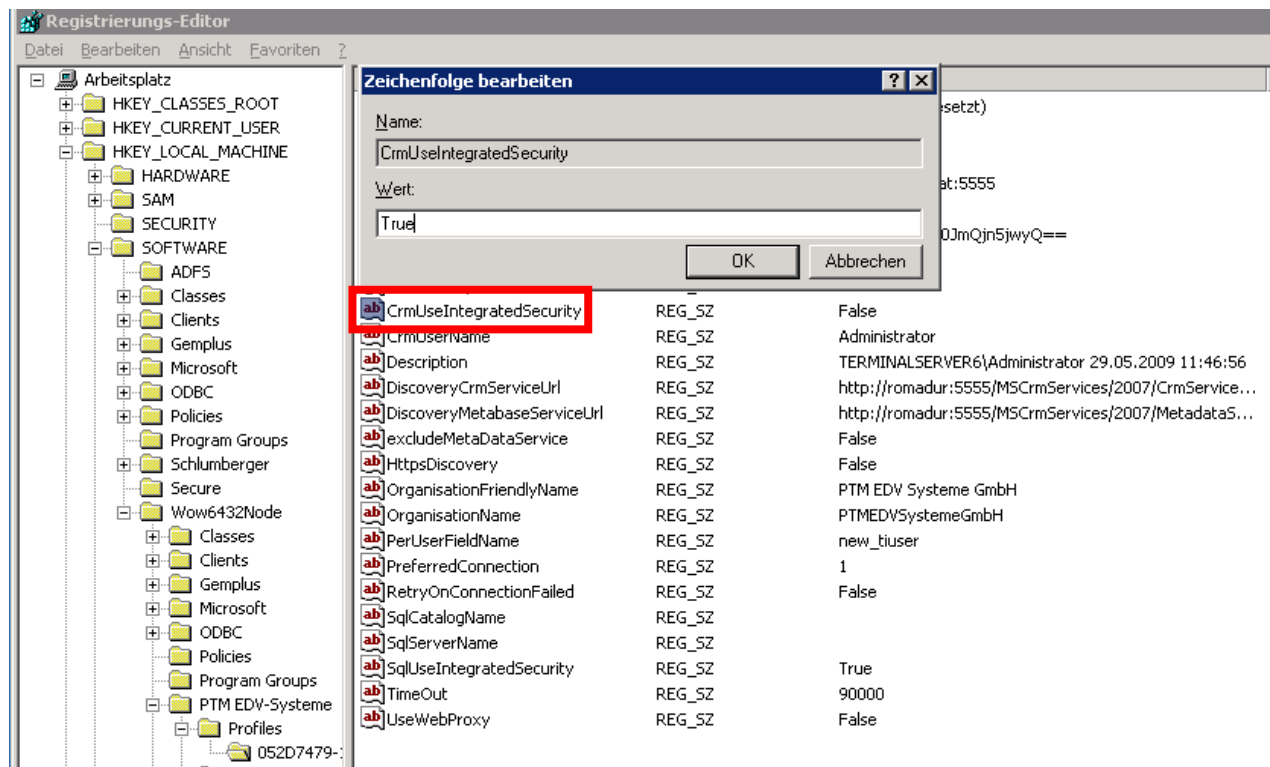
1.5 Language Settings for Documents Core Pack

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

1.5.1 Language Settings on the Client

1.5.1.1 Location of the Language Settings on the Client

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

The language file is located in the sub folder **localization** of Documents Core Pack installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Client for MS CRM 4\Localization"

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

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

1.5.1.2 Modifying the UI language on a client

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

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

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

1.5.1.3 How to translate a language file

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

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

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

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

1.5.2 Language Settings on the Server

1.5.2.1 Location of the Language Setting on the Server

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

1.5.2.2 Location of the Language Settings on the Server

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

The language file is located in the sub folder **localization** of Documents Core Pack installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Server for MS CRM 4\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 Documents Core Pack you have to translate both files the language file on the client and on the server.

1.5.2.3 Modifying the UI language on a client

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

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

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

1.5.2.4 How to translate a language file

Look at chapter 1.5.1.3

1.5.3 Too Long Mergefields Problem

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

{ MERGEFIELD customerid_contact_parentcustomerid_address1_country *
MERGEFORMAT }

{ MERGEFIELD customerid_contact_parentcustomerid_address1_fax *
MERGEFORMAT }

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

«customerid_contact_parentcustomerid_addr»

«customerid_contact_parentcustomerid_addr»

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

1.5.3.1 Set up Too Long Mergefields

Available since **DCP-Server Version 4.0**

Now to solve this Problem we added the possibility to replace long Names with short Names. For e.g. "parentcustomerid" with "pc1".
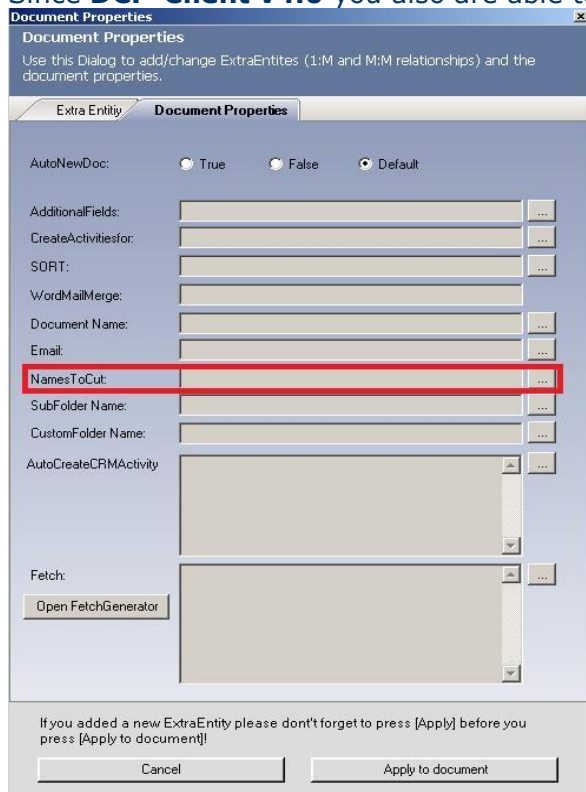Notation: Old long – new short

Each pair separated by "**,**".

In the **settings-entity** of DCP-Server there is a new KEY called "**NamesToCut**". (Do not change this name!)

```
parentcustomerid-pc1,parentaccountid-pa1
```

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

Since **DCP-Client v4.0** you also are able to store in the template.

So you can find "Document Properties": Microsoft Office Word <www.mscrm-addons.com><Insert MailMerge Fields><Document Properties>

These Template-NamesToCut-Settings **overwrites** the Settings from the server!

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

1.5.3.2 Important thing you should know!!

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

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

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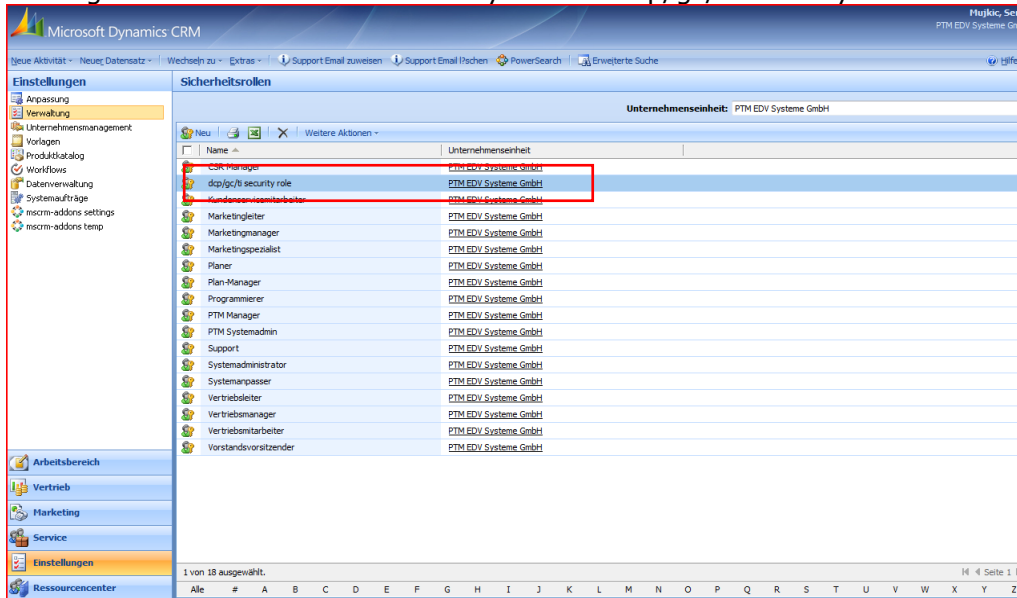E.g.:
"customerid_contact_parentcustomerid_address1_fax" to
"cust_cont_par_adr1_fax"

So old Templates won't be affected but you have to add every Field to the web.config.
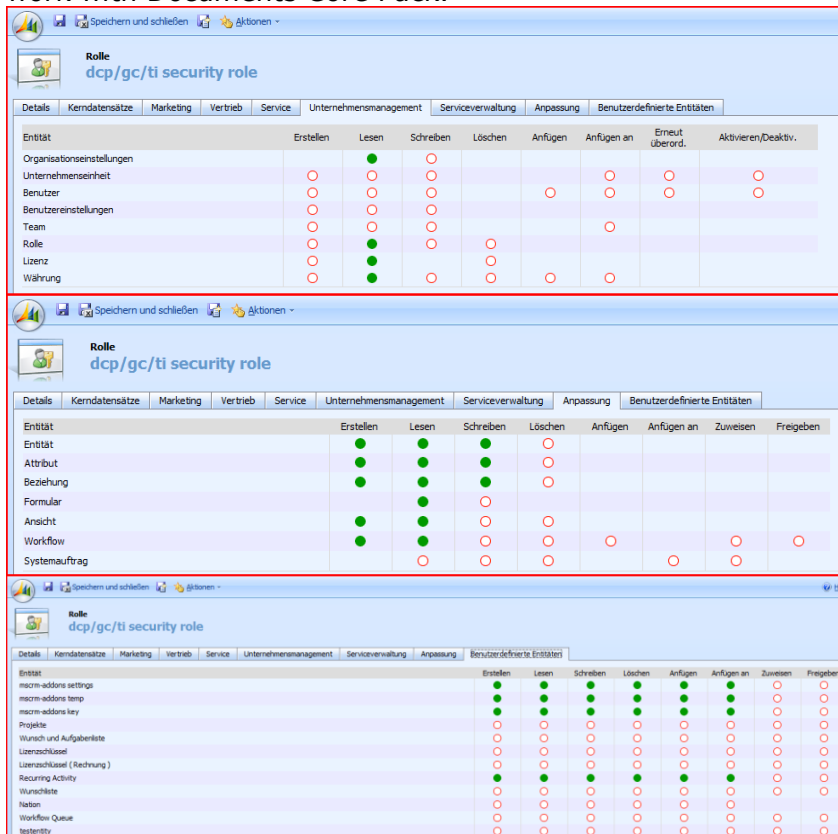
1.6 Documents Core Pack Security Settings

1.6.1 Security role

How to find the Documents Core Pack Security role:
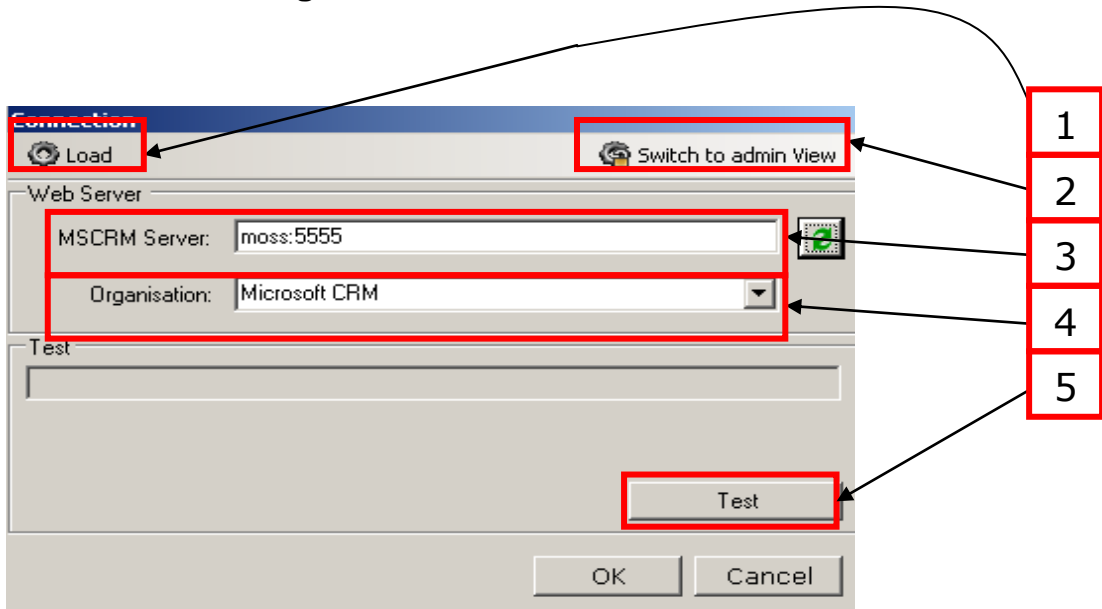Settings > Administration > Security roles > dcp/gc/ti security role

The following screenshots show, which CRM rights are necessary so that you can work with Documents Core Pack.

1.7 The Connection-Dialog

1.7.1 Connection-Dialog

1. **Load**
   Provides the possibility to load pre-configured connection profiles (e.g from earlier installations)

2. **Switch to admin View**
   With this Button you can change to admin View (See 1.7.2)

3. **MSCRM Server**
   Enter the Name of the CRM Server.
   This is the name you enter in the Internet Explorer(without http://).
   Also enter the port number if it is not standard (80).

4. **Organisation**
   Enter the Organisation-name or click on the Combo box button and the available organizations will be shown.

5. **Test**
   You should check the connection first, before you click „ok".

1.7.2 Connection-dialogue (admin view)
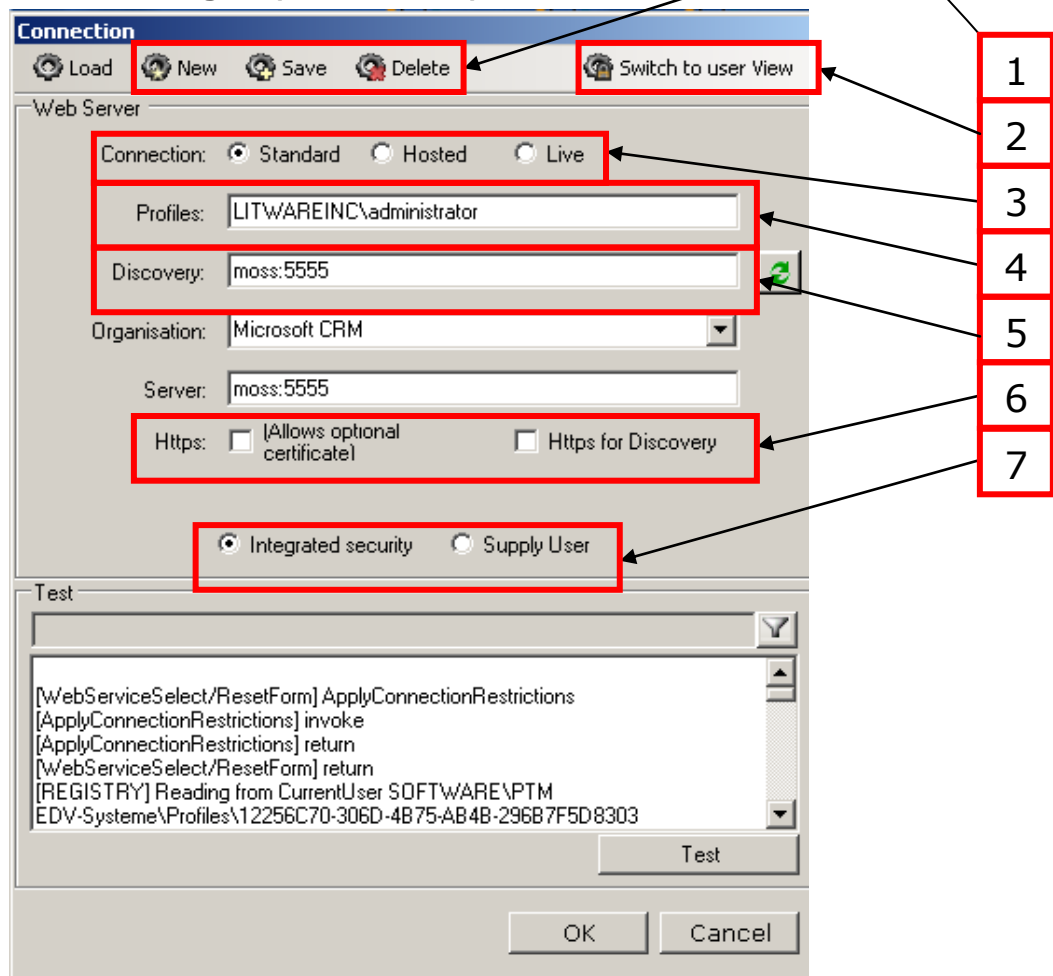
1. **New, Save, Delete**
   Allows you to create new, save and delete profiles.

2. **Switch to user View**
   Click to switch to User view. (See 1.7.1)

3. **Connection**
   Select the kind of the connection (Standard, Hosted or Live).

4. **Profile**
   Contains the name of the profile

5. **Discovery**
   Enter your crm-server here. If you don't get any organizations when entering your crm-server, please contact your system administrator.

6. **Https**
   If your CRM server is configured to run via SSL, the client has tob e configured to use https too.

7. **Integrated Security – Supply User**
   Here you can specify a user credentials for the CRM-connection or to use integrated security (credentials of the actual windows-user will be used).

2 Documents Core Pack Templates

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

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

2.1 How to create Documents Core Pack Templates

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

2.2 Security Settings for Documents Core Pack Templates

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

The save Documents Core Pack templates are saved in a share on the server where you installed the Documents Core Packr server component by default.

Typically under c:\program files\PTM EDV-Systeme GmbH\Documents Core Pack Server for MS CRM 4\templates\

If you only want to allow a few users, to create or change templates for DocumentsCorePack, they can be justified by defining the NTFS security settings on the file share.

Furthermore there is the possibility to change the folder/path of the DCP-template.
You have to open the DocumentsCorePack-Config.
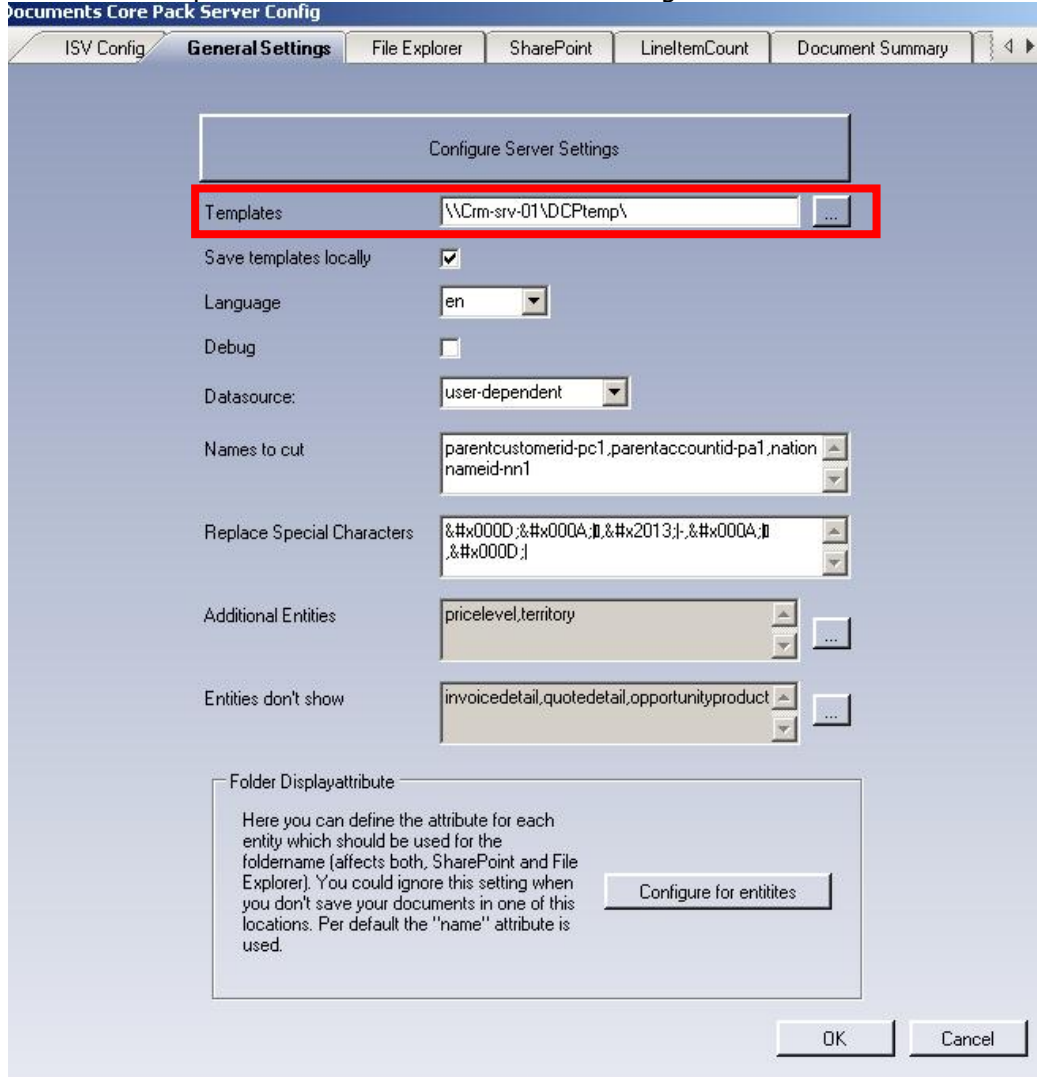
3 The Documents Core Pack Data- Provider

Since version 2.18 the Documents Core PackDataProvider has been implemented.
It builts up the webservice which is needed to load data from CRM to MS Word
and inversely to save data into MS CRM.
This improves the performance of Documents Core Pack as the webservice don't
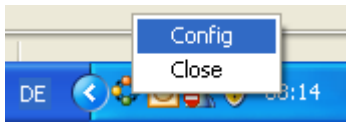has to be established again.
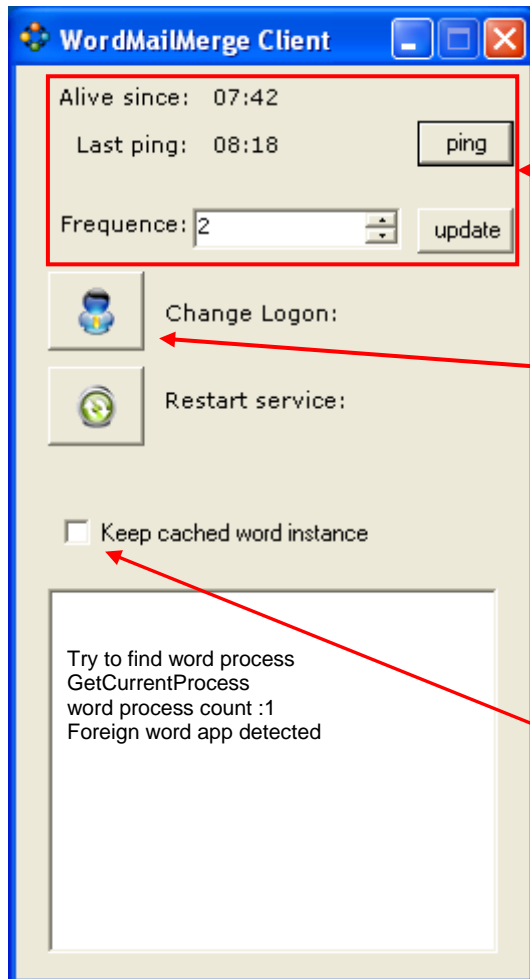You can see if the Provider is started in the taskbar.

3.1 Configuration

Right-click on the icon in the taskbar -> "Config" to open the Documents Core PackDataProvider configuration.
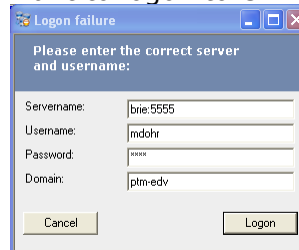
Following window appears:

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

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

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

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

Contact

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

Additional information and FAQ can be found on:
http://support.mscrm-addons.com