DocumentsCorePack for MS CRM 2011

Version 5.94, September 2013

User Guide
(How to work with DocumentsCorePack for MS CRM 2011)

Table of Contents

1 User Guide

This guide gives detailed explanations of all functionalities provided by **DocumentsCorePack** for MS CRM 2011.

If you need to reach us, see the Contact page.

2 Introduction

DocumentsCorePack (DCP) provides the possibility to create and manage documents associated with CRM – records in a comfortable and structured way. Additional utilities simplify and improve the use of MS CRM and optimize business processes like sending quotes or invoices.

<u>Main Features</u>:

- **WordMailMerge**
  Enables the creation of Word-documents with data from MS CRM. It's capable to resolve any relations and works with custom entities as well as with standard CRM entities. Therefore, DocumentsCorePack provides the opportunity to e.g. create quotes, invoices including data from related records like "other contacts", accounts, products, etc.

- **Activity Creation**
  With the possibility to create letter-/email-/or fax-activities, the generated content can be stored back to the regarding CRM record.

- **Send and Save as PDF, XPS, DOC, DOCX, ODT, PDF and DOC**
  Created documents can be sent and saved as PDF, XPS; DOC; DOCX; ODT, PDF and DOC files. It converts the generated documents and therefore DocumentsCorePack provides a powerful option to simplify accounting by handling customer's invoices, quotes, orders, etc.

- **Document Management**
  With the possibility to link DCP with the CRM-SharePoint-integration, the addon allows storing generated documents in a structured way. Documents related to a record (e.g. account or contact) can be accessed via the "Documents" setting in the CRM navigation menu.

  - ***External SharePoint Integration***
    Next to the CRM-internal SharePoint integration, which is available for MS CRM online too, it is possible to use any other SharePoint-service to store documents.
  - ***Microsoft Windows Explorer Integration***
    The SharePoint functionality is also available for the Windows explorer. This allows getting a structured file system of documents associated with CRM without the need to use SharePoint services.

- **Document Summary**
  The Document Summary is a tool to show you all documents and records (cases, quotes, invoices…) related to a specific record. E.g. Users can open an account and get an overview of all documents of this account and of all related records.

This documentation aims to describe the main settings, including step-by-step descriptions about how to use all benefits provided by DCP.

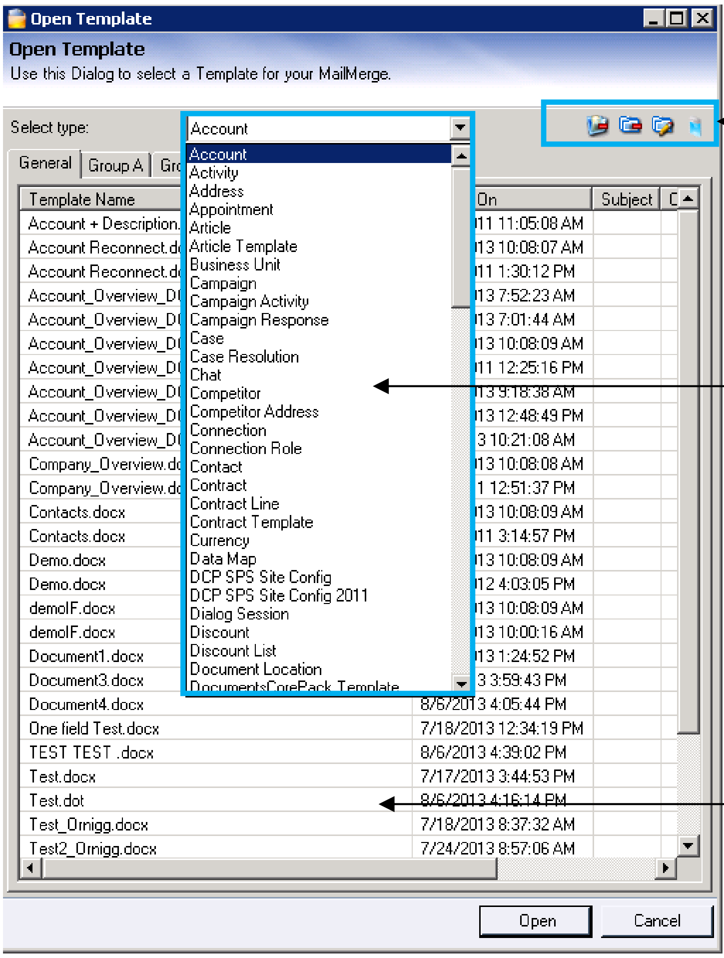
3 DocumentsCorePack-Templates

DocumentsCorePack – templates include predefined fields, so-called mail merge fields. These are references to attributes in the CRM-system (name of company, address, primary contact, mobile phone number…).

It is possible to create templates for each MS CRM – entity (contacts, companies…). The created templates can then be used by each user for generating documents.

For example:

1. Account-templates
2. Quote- and invoice-templates
3. Marketing-list-templates for multi-mails etc.



Click here to:
- Delete a template
- Delete a group
- Rename a group
- Or open a record

Important basic- and example-templates are included in the DocumentsCorePack install.

Here you can see the name and the date of created Templates.

Basically, there are two different types of templates (Standard and Office Open XML). The following comparison illustrates the main differences.

Standard	**Office Open XML**
Advantages: • Use of the MS Word mailmerge-functionality • CRM-attributes are treated like standard MS Word merge-fields. • All MS Word formatting options allowed	Advantages: • CRM-attributes are handled by ContentControls • Automatic creation of line-item-lists • No limitation of the number of "One:Many" – relations • No Macros required
Disadvantages: • Complex configuration of templates that should show a list of items (e.g. a quote including a table of quote-products) • Macros often required (e.g grouping) • Only one "One:Many"- relation can be dealt in a template.	Disadvantages: • Template creation requires a higher amount of MS Word experience • The automated line-item parts do not allow using all MS Word-formatting options.

First, we need to take a look at the creation of those templates.

3.1 Creating templates using Office Open XML (.docx)

The procedure of creating the template using Office Open XML is nearly equal to those of standard-templates. (See chapter 3.3).

Office Open XML has been invented to enable the creation of very complex templates that normally require the use of macros.

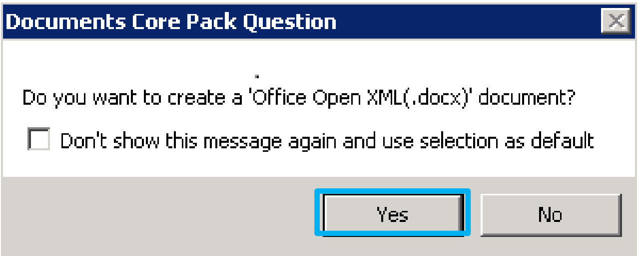
This chapter contains a step-by-step description about how to create a quote-with-grouping template. This means that the quote-products are grouped by the value of a specific CRM-attribute (e.g. subject) which is quite a common requirement.

1. Create template layout

First, we need to create the basic layout of the template.

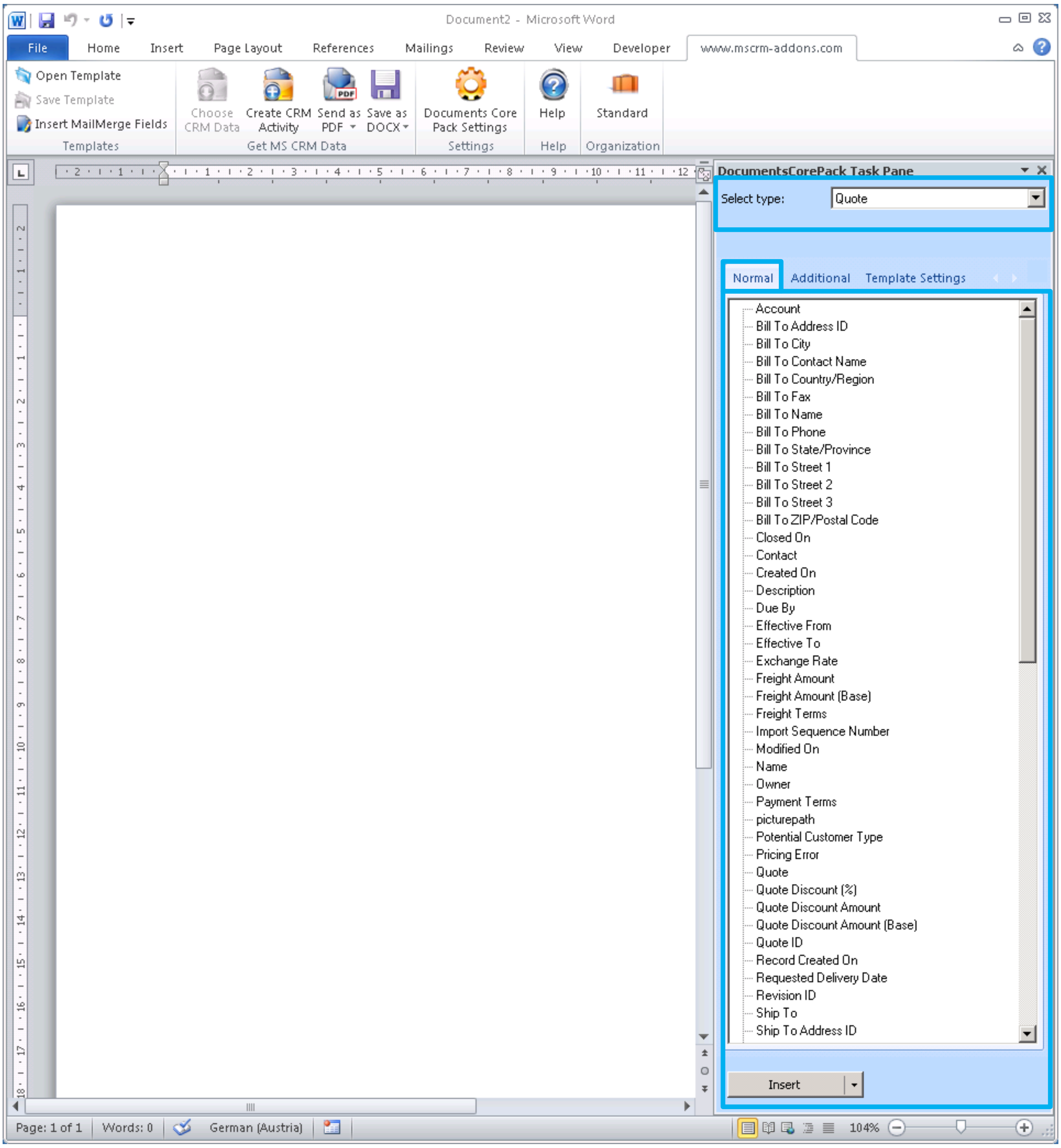
In our case it contains a header with information about the customer (address, contact-information…), a list of products grouped by subject and a footer.

As described in the previous chapter, we can do this by simply opening the “Insert Mailmerge Fields” dialogue. The following message will appear:

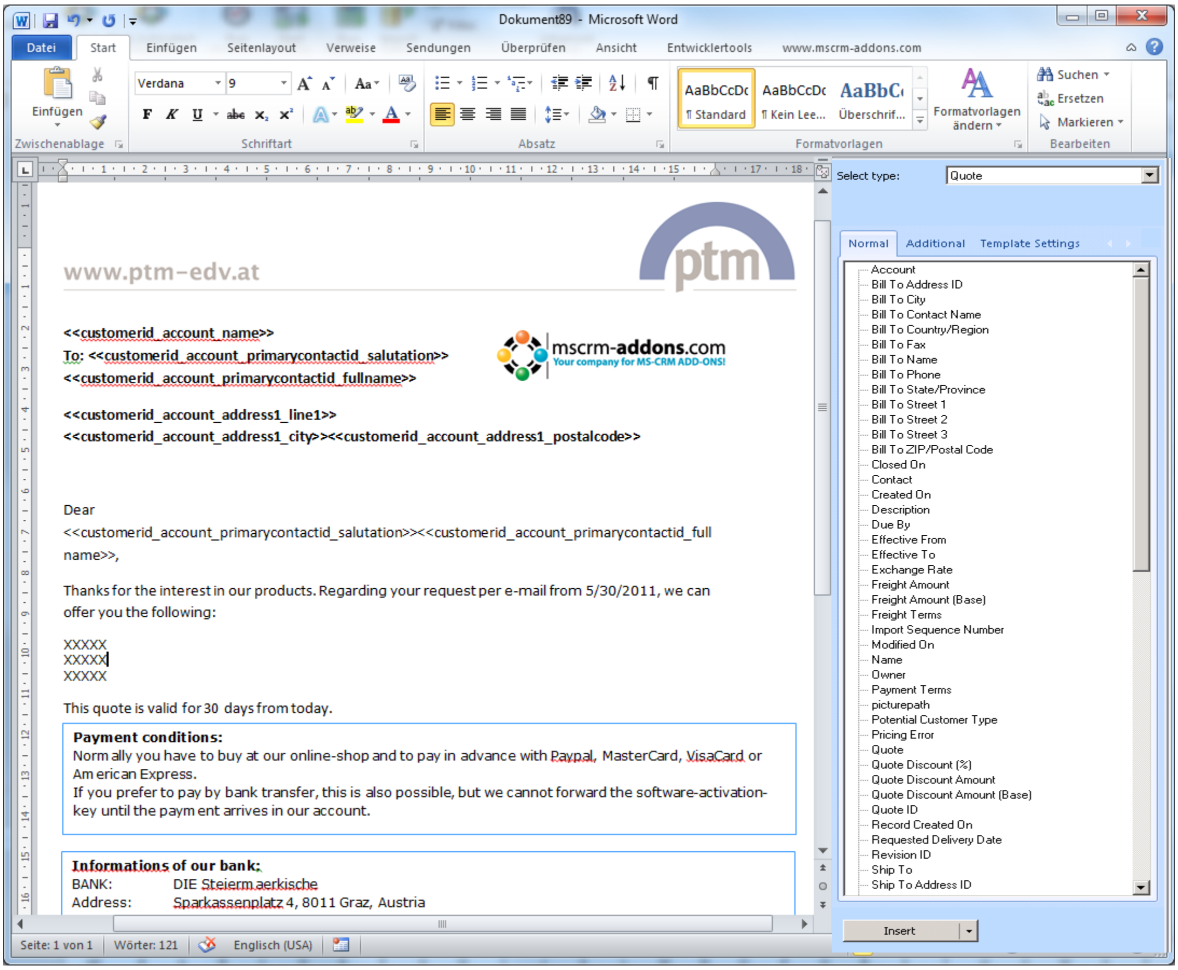


Press [Yes] to create a ‘Office Open XML(.docx)’ document. The DocumentsCorePack Task Pane appears. Now we can insert the fields we want. All N:1 relations are resolved automatically. Therefore, we can insert fields from the potential customer, owner, etc. as well.

First, we have to choose "Quote" in the "Select type"-dropdown-box.



After inserting some fields and pictures, our basic quote template is ready and looks like this:

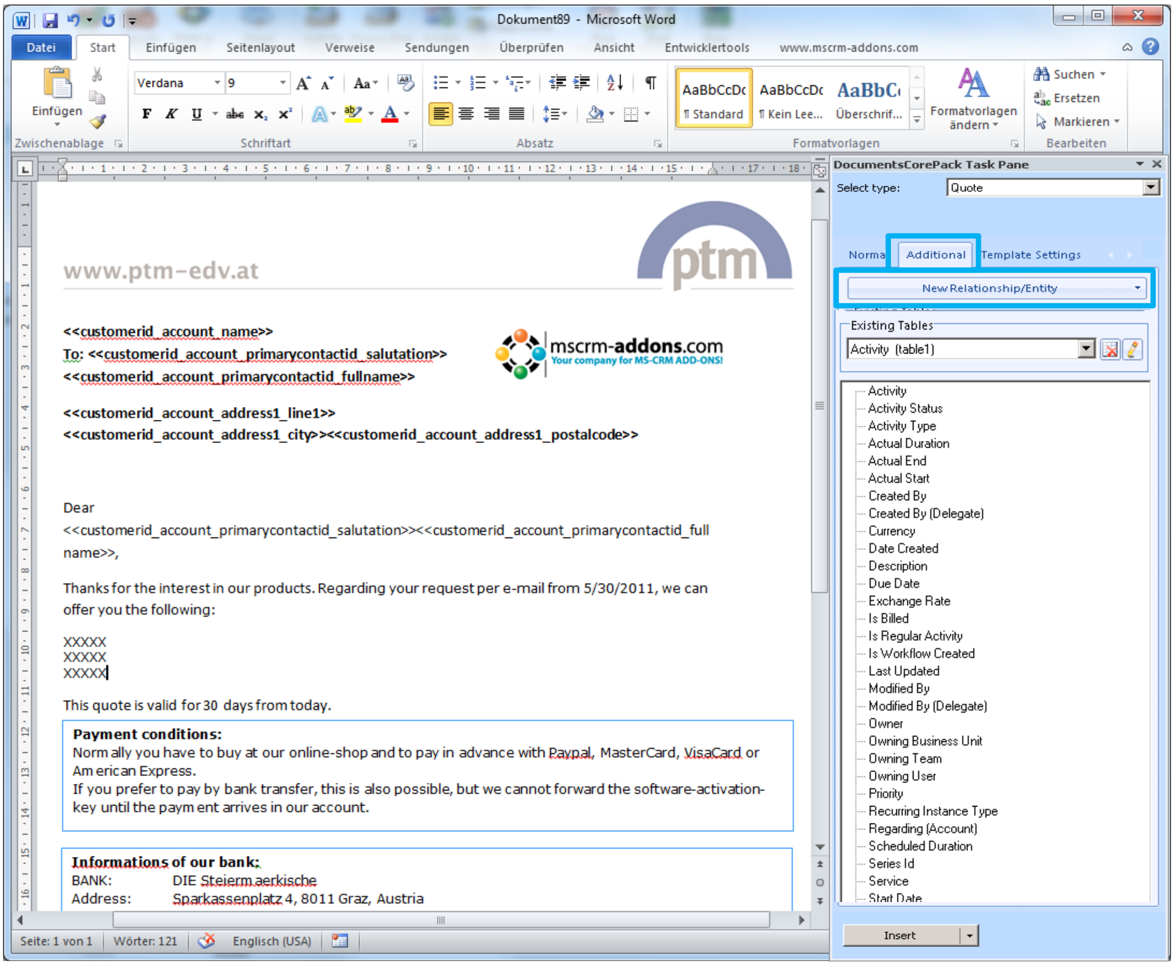


The XXXX – part marks the place where we want to add the list of quote-products including a total-sum field at the end.

When using standard templates, we would now have to ad if-statements and switch the directory type, etc. With Office Open XML, this is a lot easier.

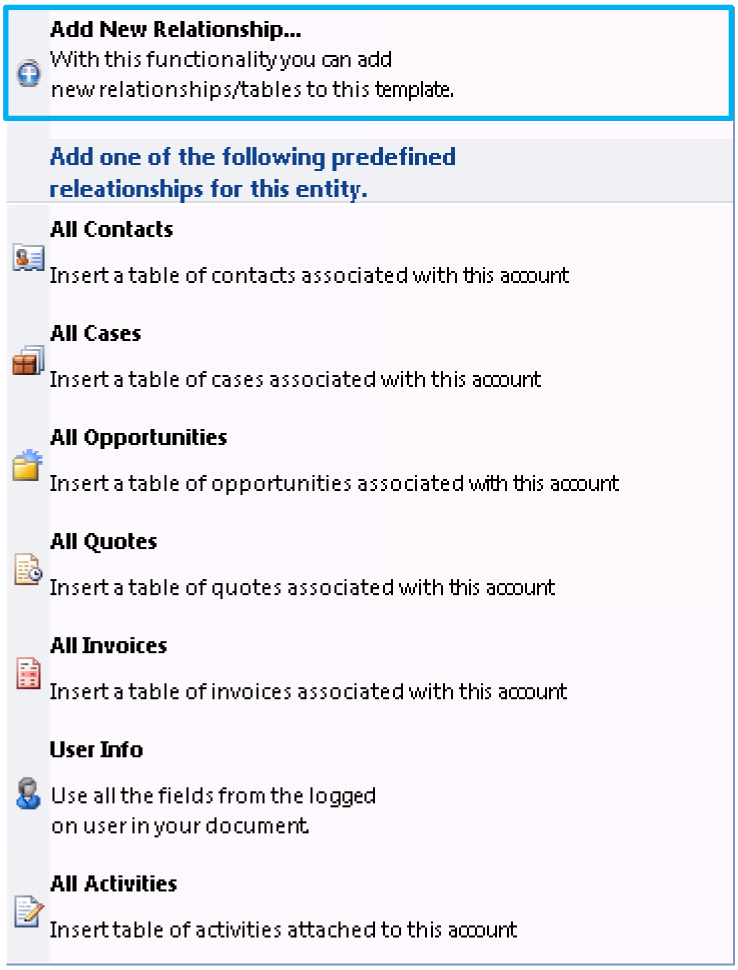
2. Add line-item relationship

First, we need to resolve the quote-quoteproduct relationship. Therefore, we need to click on the [Additional]-tab in the DocumentsCorePack Task Pane.



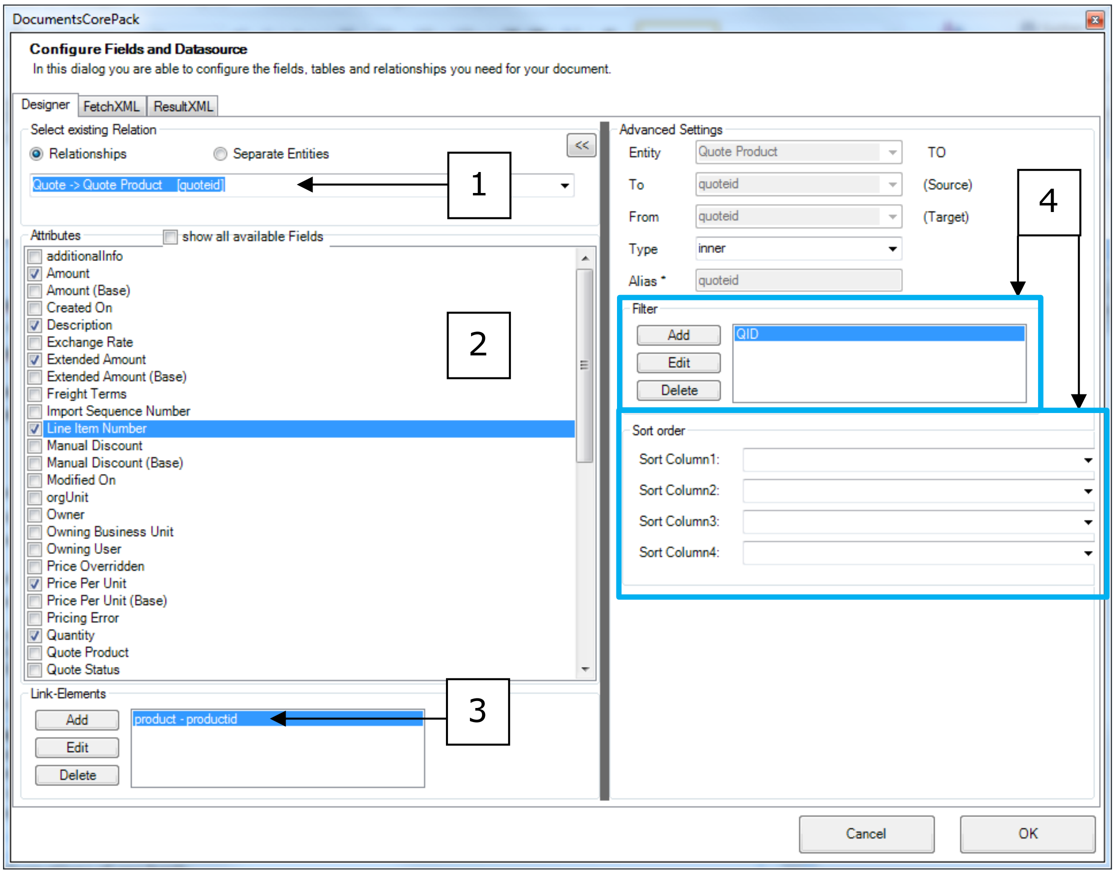
The **„Additional"** section allows to resolve any relation/entity within CRM and brings up a list of all attributes from the related entities so that they can be used within the document too.

When hitting the "New Relationship/Entity" button, following window appears:



DocumentsCorePack provides already predefined relationships for certain entities, which you can use straight away.

Choose "Add New Relationship..." to move on.

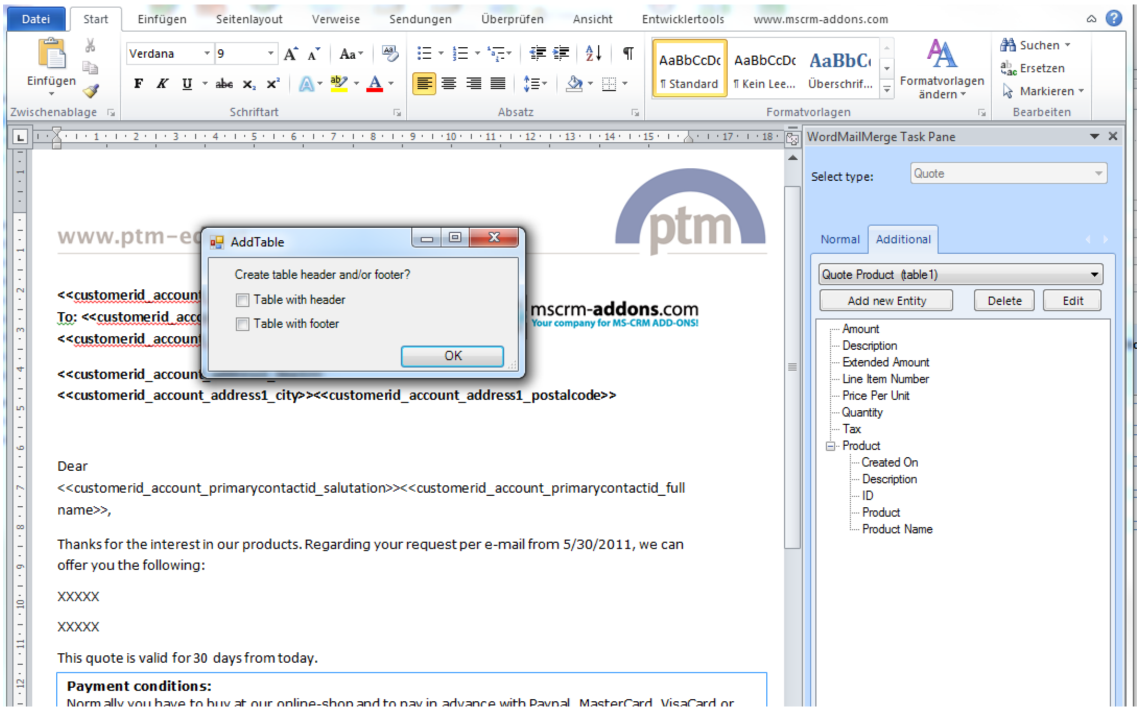


- Here we can choose a relationship(1) (Quote->Quote Product in our example) and select the fields that should be available for insertion (2).
- At the bottom we can add further link-elements in the same way. E.g QuoteProduct->Product (3).
- If necessary we could also define a sort-order for the quote-products or specify a filter value (4).
- That's basically all we need. We can finish this procedure with a click on [OK].
- We can resolve new reletionships if there is no predefined ones.

3. Inserting table

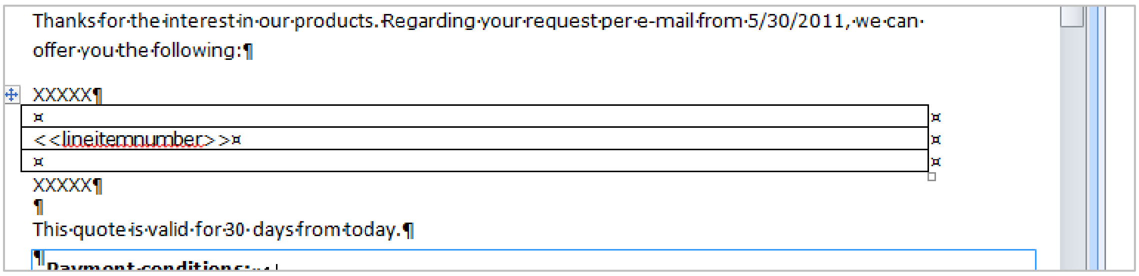
When getting back to the template, we can see that the attributes chosen at step 2 are now listed in the task-pane.

The procedure of inserting a table of items is completely automated, so we just need to set the curser to the position where we want to add the table and double click on one of those attributes. The following message will appear:



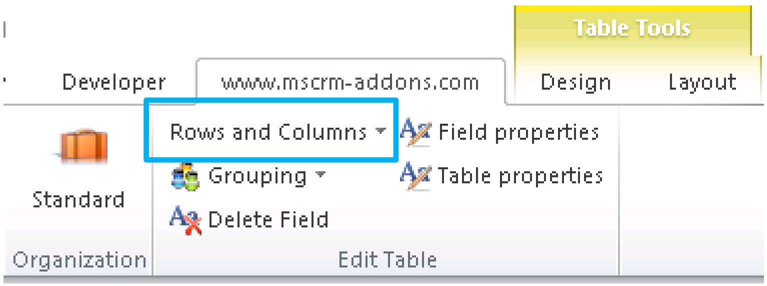
So we can choose whether we want to add a table header or not. In our case we choose header + footer and proceed with a click on [OK].

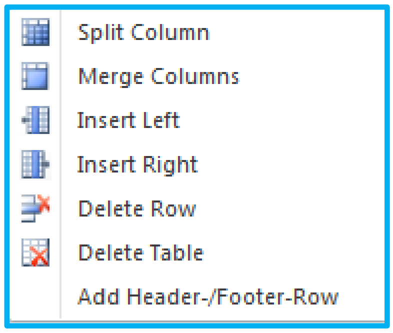
As a result, the table will be inserted at the determined position:



4. Formatting the table

Once the table is inserted we can add fields like quantity, product-name or even a table header with column-names with the formatting options available in the www.mscrm-addons.com

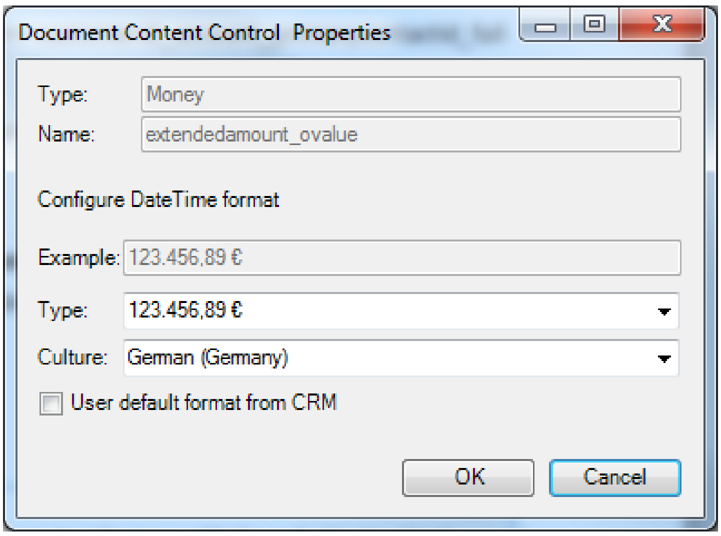




Once finished, our table could look like this:

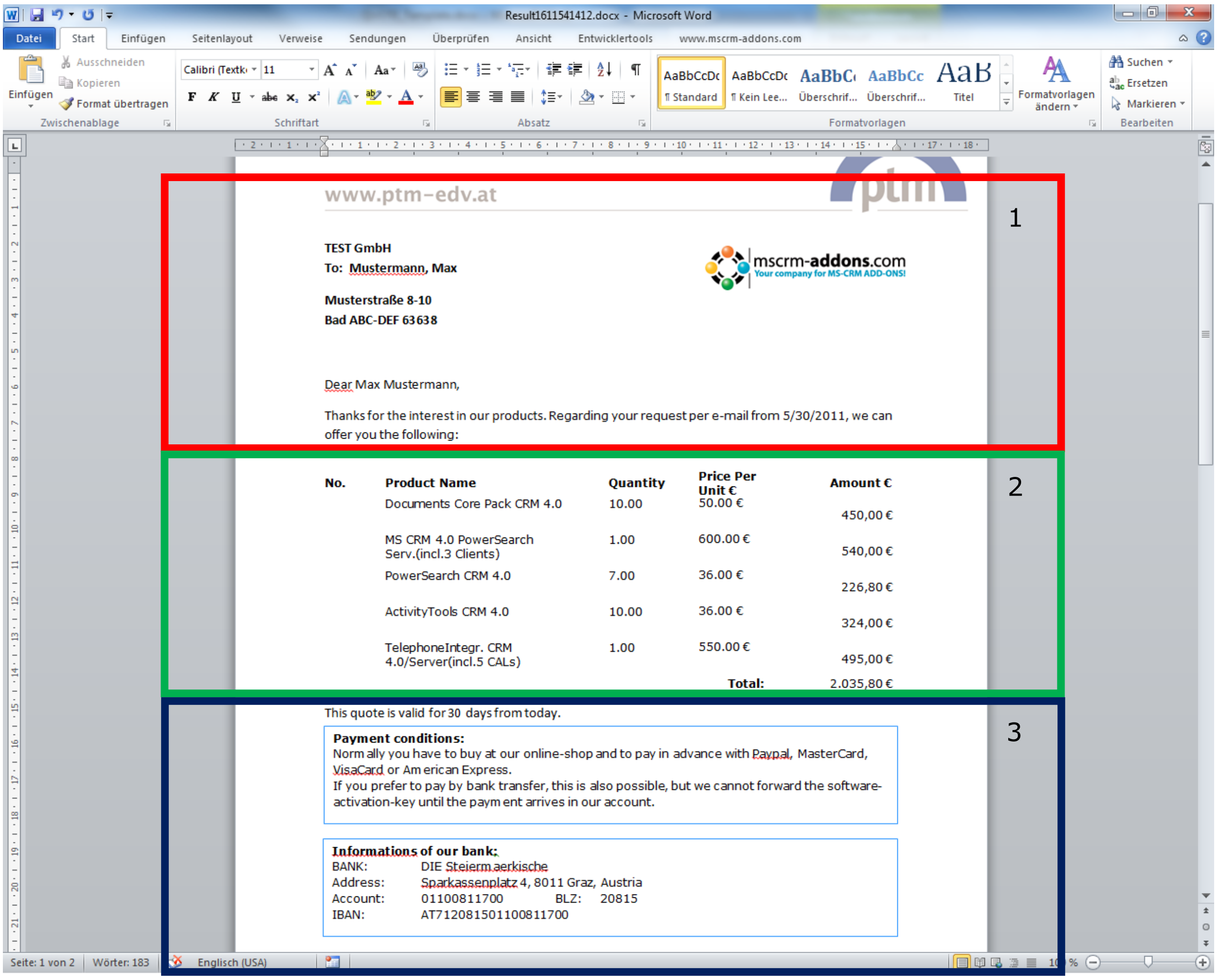
No.	Product Name	Quantity	Price Per Unit €	Amount €
<<lineitemnumber>>	<<quoteid_productid_name>>	<<quantity>>	<<priceperunit>>	<<extendedamount>>
			Total:	**<<extendedamount>>**

The "Field properties" allow us to specify e.g. the format of money fields like <<extendedamount>>:



5. Result

After saving the document and choosing CRM-data we can see the result with the replaced fields at the top (1), the line item table including the sum in the middle (2) and the bank-details at the bottom (3).

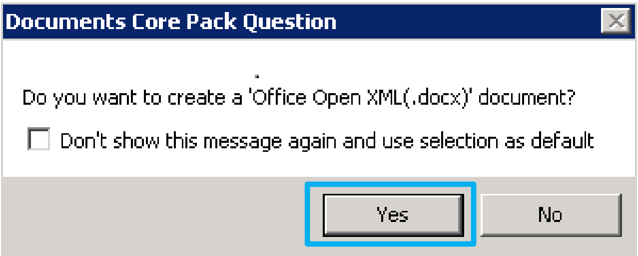


3.2 Insert QR-code-fields in Office Open XML template (.docx)

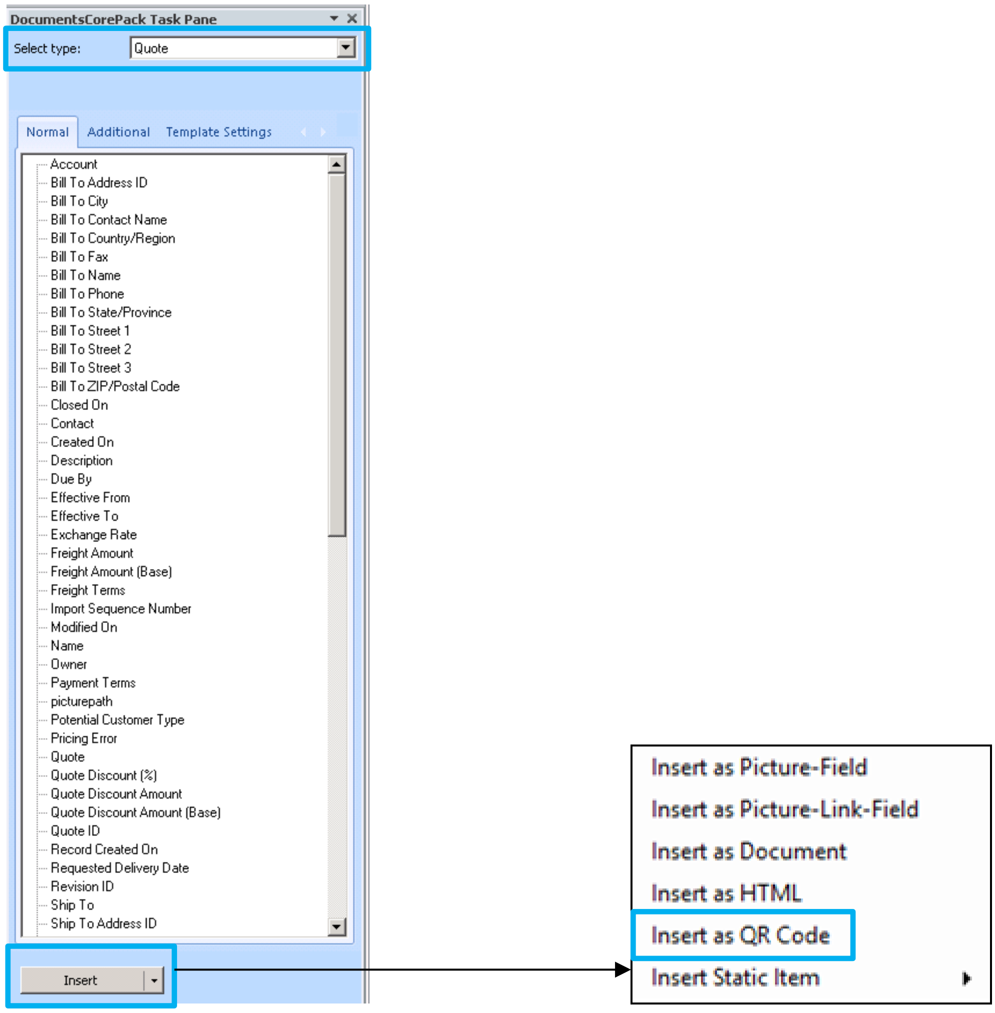
This new feature enables you to easily insert QR-code-fields into Office Open XML (.docx). For more information about QR-codes please click here.

The **"Insert as QR Code"**-function is available on every selected template type and for every inserted field.

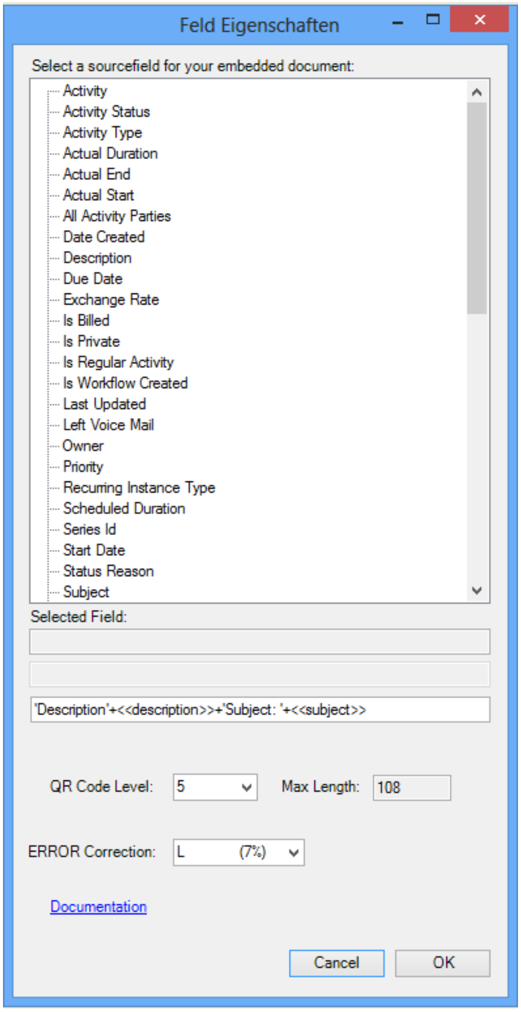
You can find the new function in the "DocumentsCorePack Task Pane". To get there, please open an existing or create a new template. Click on "Insert MailMerge Fields" in the toolbar and create a "Office Open XML (.docx)"-document by answering the question with [Yes]. (See screenshot below)



The "DocumentsCorePack Task Pane" appears:



Choose the required type in the “Select type”-dropdown box in our example “Quote”. Next click on the drop-down button within the [Insert]-button and choose the “**Insert as QR Code**”-function. Following window appears:



Now the required QR-code field(s) can be inserted with a **double-click**.

NOTE: The displayed tree contains the same fields as you have choosen before in the “DocumentsCorePack Task Pane” under “Select type”. If you want to insert e.g.: account related fields, close the “field properties”-window displayed above, go back to the “DocumentsCorePack Task Pane” and choose "account”.

You can **insert as many fields as you want**. Fields are displayed with angle brackets and separated with a “**+**”-sign in between. E.g.: <<description>>+<<subject>>. Additionally you have also the possibility to specify the name of the QR-code as follows:

1. Specify QR-code-name:

This setting predefines the name of the QR-code generated with this template. As mentioned above it’s possible to use data from fields out of CRM to be part of the QR-code name. With this it is possible to generate the QR-code-name dynamically, based on constant characters and/or values of fields.

Constant characters have to be in single quotes. To use field values in the QR-code-name you have to choose the fields as described above or write the fieldname (schemaname) surrounded by <<and>>.

Some examples:

QR-code-name	possible QR-code-name results
'quote-'+<<quotenumber>>.pos(4,5)	quote-12345
<<customerid_account_name>>+'-'+<<quotenumber>>	TestCompany-QUO-12345-KWKJQ6

It is important that the inverted commas are also set!

Functions:
".pos(x,y)" will insert y signs from the xth position.
".left(x)" will insert the first x – signs
".right(x)" will insert the last x signs of the string

Afterwards all the selected types and fields will now be inserted as a QR Code:

Now the QR-code is ready to be merged with data from CRM (you can do this by clicking on the "Choose CRM Data"-button in your www.mscrm-addons.com tab). The QR-code can be a link, a visit-card-contact, contact, product information… etc.

NOTE: The information that the QR-code contains has to be plain text information!

2 QR-code settings

QR-code settings can be changed by clicking on the [Field properties]-button in the www.mscrm-addons.com-tab.

- **Type**: shows the inserted field type. In our case it is "qrcode".
- **Name**: shows the name of the inserted field.
- **QR Code Level**: shows the displayed level of the QR-Code. The default-setting detects the smallest value. If e.g.: the value of this option is set with 5 with a maximum sign-length of 108, then only 108 signs will be displayed. All the signs which exceed this maximum length are cut. By clicking on the dropdown-button the level can be set from 1-20.
- **Max Length**: shows the maximal length of the information the QR-code contains. The maximal length changes automatically with the chosen QR-code level.

  IMPORTANT: It is recommended to choose the default value to ensure that the information is resolved properly! Standard QR-code readers are able to dissolve the QR-code properly if the level has a maximum value 8. Otherwise the QR-code reader has to provide a higher quality.

- **ERROR Correction**: defines the capacity and fault tolerance of the QR-code. The value shows the amount that can be restored in percent. Please find in the list below the common level.

Capacity of the different error correction levels:

Level L	7 % of the code words/data can be recovered
Level M	15 % of the code words/data can be recovered
Level Q	25 % of the code words/data can be recovered
Level H	30 % of the code words/data can be recovered

IMORTANT: It is recommended to choose the default value. Otherwise data may be lost by trying to resolve the code!

3.3 How to set if/else conditions in Office Open XML template (.docx)

It is often required to place conditional fields within a template like e.g. only print address lines when stored in the regarding CRM-record.

Syntax:
The syntax needed is pretty simple:
{if"<<CRM_FIELD>>"="XY" "Content if condition is fulfilled" "Content if condition is not fulfilled"**}** where the yellow part marks the condition, the green part the content that will be printed if the conditions is fulfilled and the red part the content that is printed if the condition is not met vice versa.

IMPORTANT:
The {} <- brackets are not just standard wavy-brackets but field-functions of MS Word and have to be inserted by pressing Ctrl+F9 or via "Insert"->"Quick-parts"->"Field" and choosing "if". By default, field functions are not shown within MS Word. To switch views one can simply press Alt + F9.

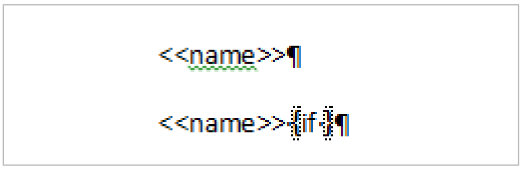
Examples:
Printing a gender-specific salutation:
Dear {if"<<salutation>>"="Mr." "Mister" "Misses"} <<lastname>>

Showing fields only if available within CRM:
{if"<<emailaddress1>>"<>"" "Email: <<emailaddress1>>" ""}
{if"<<mobilephone>>"<>"" "<<mobilephone>>"}

Common problems:

- Field – code brackets cannot be inserted inside a content control. Please ensure that the content control of the CRM-field you are using is not marked when trying to insert the {}-brackets.

- For some reasons it is not possible to insert the brackets even outside the content-controls once there is nothing else than the content-control in the whole line. To overcome this issue you can simply insert any text or a space after or before the field and then insert the {} brackets.



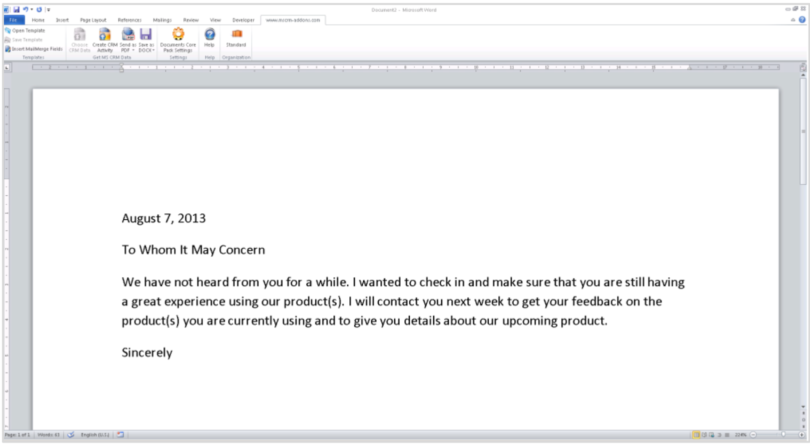
The {} cannot be inserted in the upper line of this picture without placing any kind of text. In the second line a space has been inserted after the name-field.

3.4 Creating Standard Templates

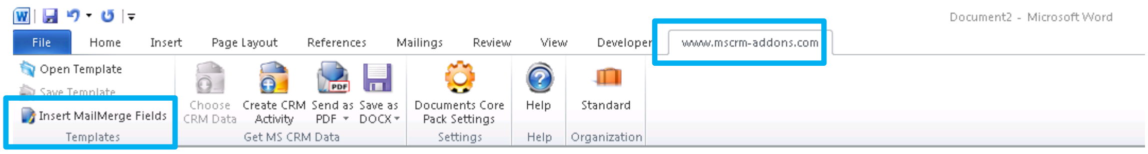
The following steps will show you how to create a DocumentsCorePack-standard-template.

1. Start Microsoft Word.

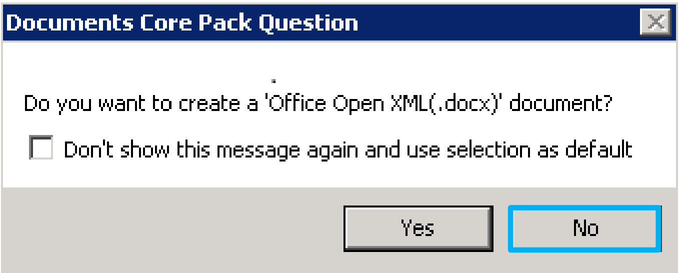
2. Write or open a document with the required content.



3. We will add the MS CRM fields now. To do this, click [Documents Core Pack for MS CRM] -> [Insert MailMerge Fields] in the toolbar.

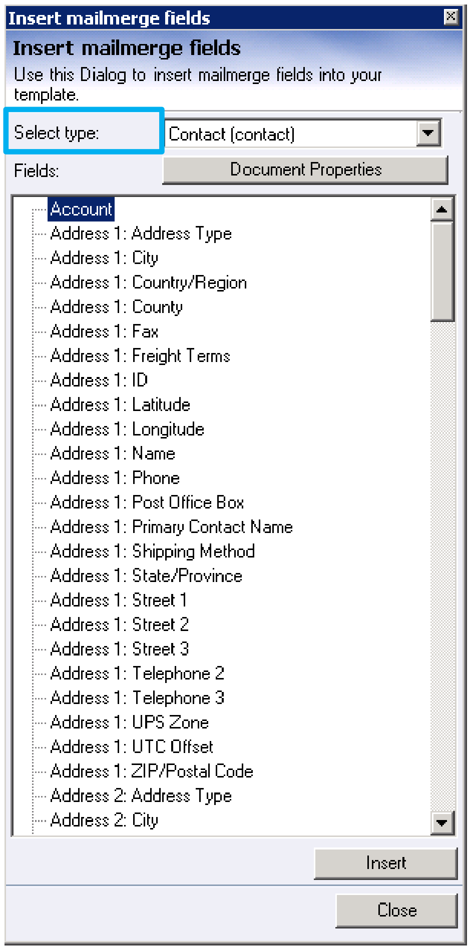


4 The following message will appear:



Press [No] to proceed creating the standard template.

5. The following taskbar will appear:

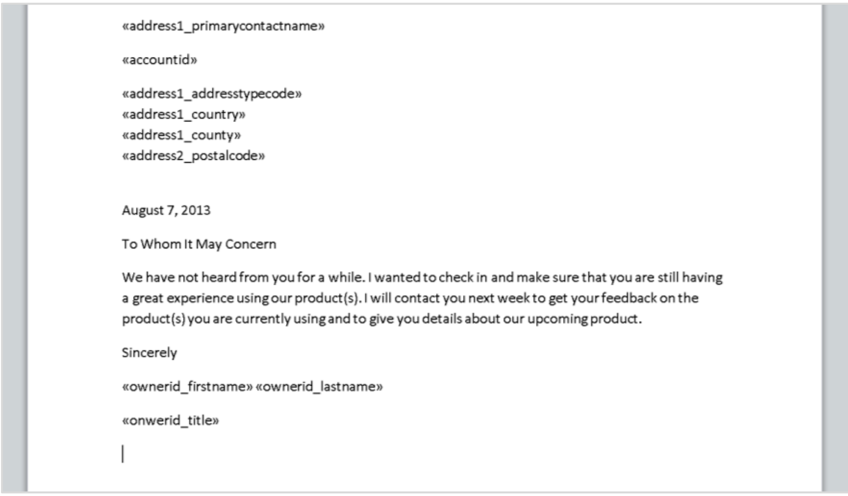


First, choose the entity of the template you want to create [Select Type].

There are specific CRM-attributes and different form letter-fields for each entity. If "Contact" is selected, CRM will only work with fields of the entity "Contact". We have chosen "Contact" in our example.

With a double click on the various fields or by selecting specific fields and clicking on the button [Insert] the selected fields are inserted into the template.

6. After adding some fields, the template will look like this:


«address1_primarycontactname»

«accountid»

«address1_addresstypecode»
«address1_country»
«address1_county»
«address2_postalcode»

August 7, 2013

To Whom It May Concern

We have not heard from you for a while. I wanted to check in and make sure that you are still having a great experience using our product(s). I will contact you next week to get your feedback on the product(s) you are currently using and to give you details about our upcoming product.

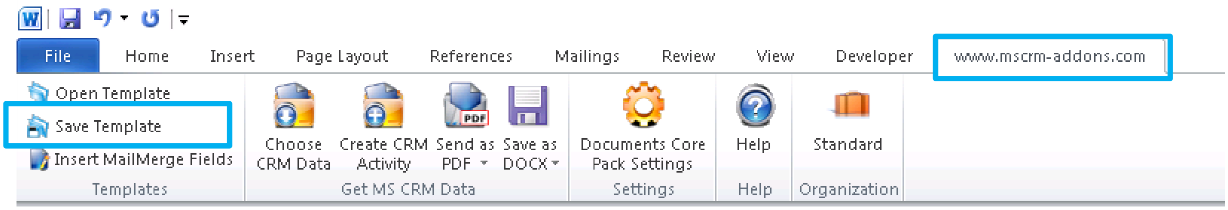
Sincerely

«ownerid_firstname» «ownerid_lastname»

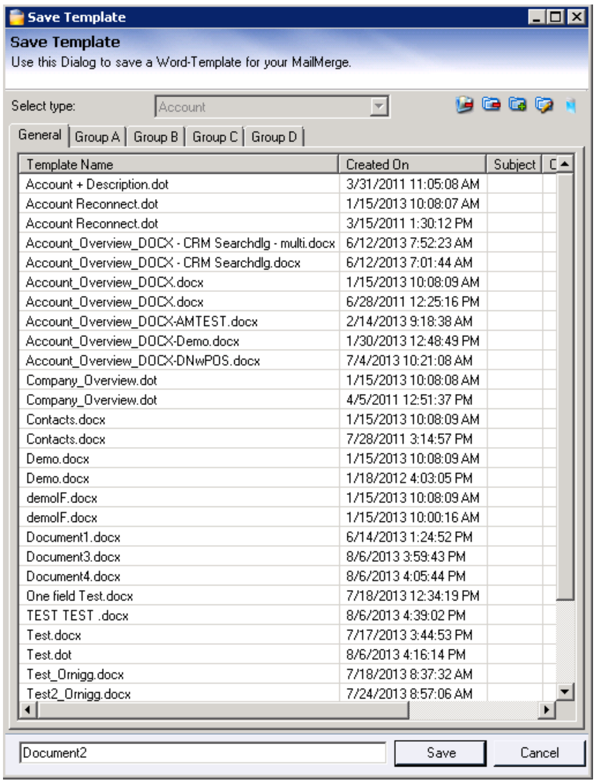
«onwerid_title»

7. Now save the template.

[Documents Core Pack for MS CRM] -> [Save Template]



8. The following dialog will appear:

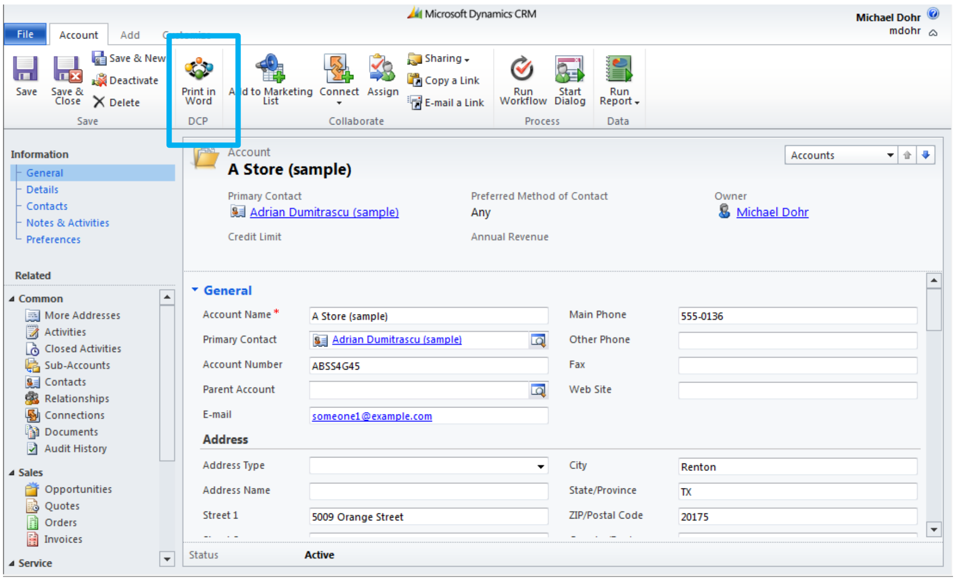


In this window you can name the template you created and decide in which category it should be stored.

In this dialog you are able to:

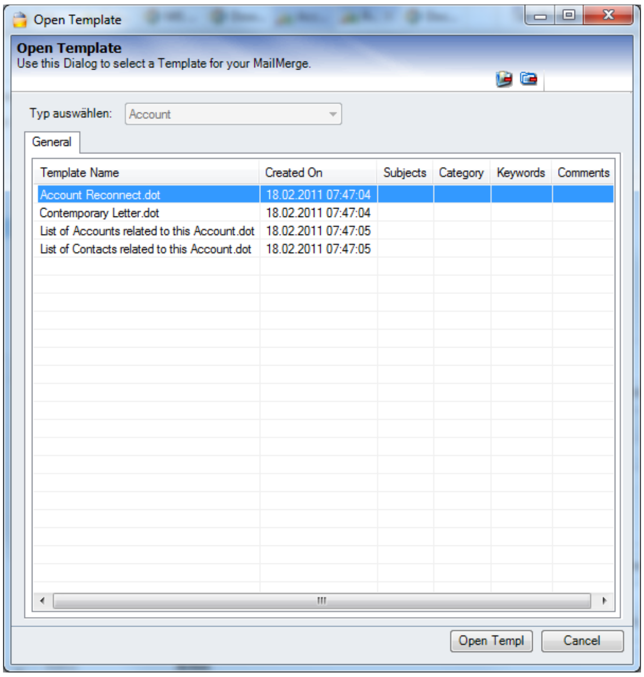
- Create new groups
- Update existing groups
- Delete templates

The template is now ready to be used. To run a first mailmerge, we open the MS CRM Client and open an account.



A merge can be started with a click on the "Print in Word" button at the top.

9. After clicking on [Print in Word], a new dialogue that allows us to choose the template we want to use appears:



10. Select your template and click [Open Templ]. You will see that the letter contains the selected fields. The fields are filled with data from the selected contact.

11. In order to produce a letter-activity with the generated template and the content you wrote as a description, click the [CRM Activity]- button in MS Word.

The content of the word file will be used automatically as description.

More details please read the previous chapter 3.1 "Creating templates using Office Open XML".

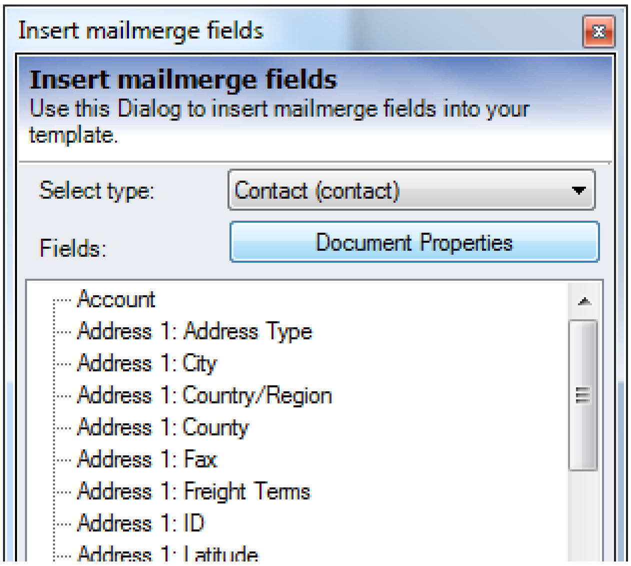
3.5 Document/Template Properties

Document properties are template – specific settings that improve the use of the templates by predefining things like:

- the **document name** of the created document
- the **default save location**
- **Sort-order** of the loaded data
- **...**

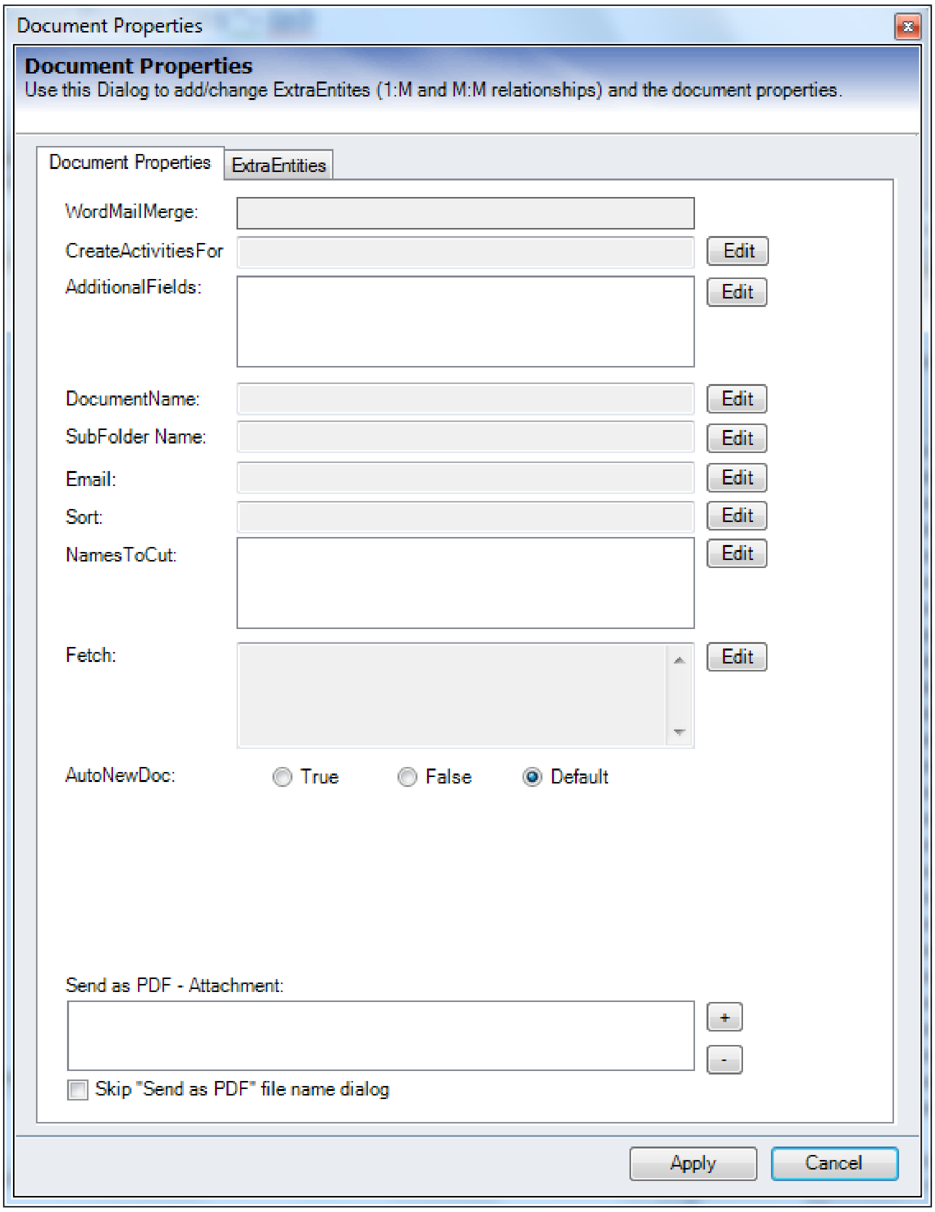
How to access the document properties

Open your template and select *"MS Word->www.mscrm-addons-Ribbon->Insert MailMergefields"*. A dialogue as described in chapter 3.1 appears. Click on [Document Properties] to access the document properties.



3.5.1 The "Document Properties"-Tab

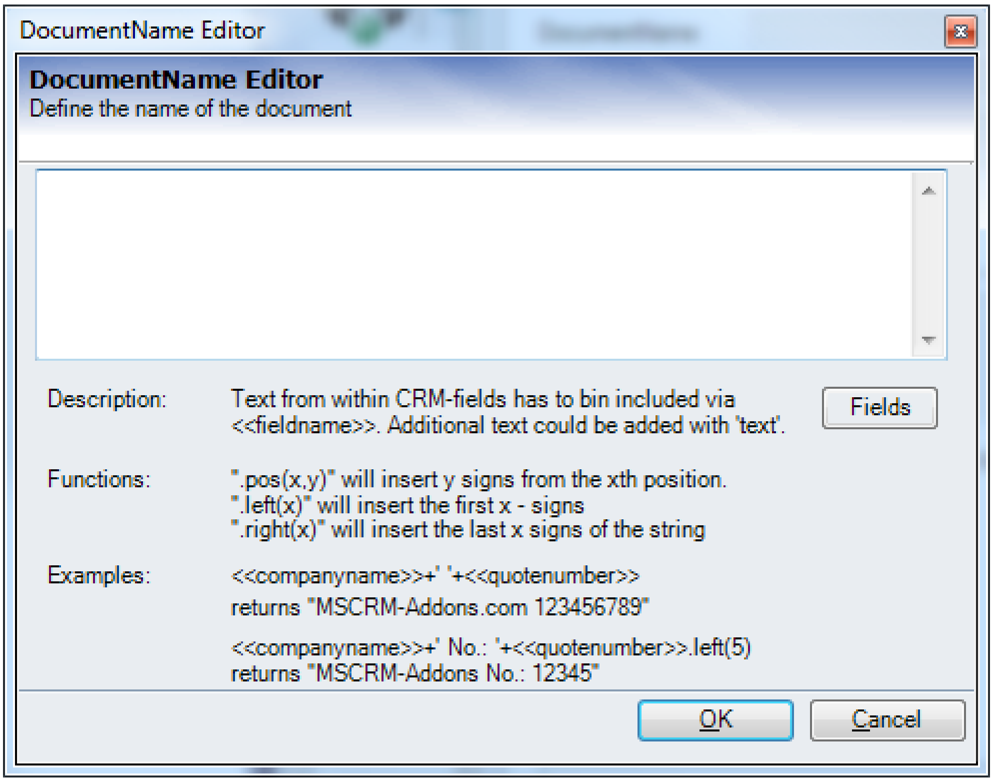
This Dialog can be used to add or change ExtraEntities (1:M and M:M relationships) and the Document Properties.



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

Settings:

- **WordMailMerge**: displays the CRM-entity the template belongs to (e.g. account)
- **CreateActivitiesFor**: needed if you don't want to add the activity into the main-entity (e.g. you are merging a marketing list and want to save the activities to the contacts or accounts from in the marketing list) Syntax: Entityname, primarykeyfield. e.g.: contact,contact_contactid -> In this case the activity will be saved to the contact.
- **Additionalfields**: to read out additional fields (attributes) which are not defined in the document; This means that those fields are loaded into the template automatically (e.g id-fields,…). This is very helpful e.g to send emails via DocumentsCorePack and you don't want the email address to be shown on the template.
- **DocumentName:** Here it's possible to predefine the name of the documents generated with this template. It's possible to use data from fields out of CRM to be part of the document name. (e.g. Company+Quotenumber.doc)



Functions:

".pos(x,y)" will insert y signs from the xth position.
".left(x)" will insert the first x – signs
".right(x)" will insert the last x signs of the string

- **SubFolderName**: When using the SharePoint or FileExplorer-integration, the documents are saved in a specific folder. This option allows defining CRM-record-specific subfolders. (e.g. save a quote in the standard-quote-folder + a ParentCustomer-Subfolder) (for details, see chapter 8)

- **Email**: This property allows predefining an email attribute. Email address stored in this field will be used by all mailing procedures within DCP.

- **Sort:** This property allows setting sort-parameters for the loaded records. E.g. Sort quote-product by LineItemNumber- ascending, or sort loaded contacts by lastname – ascending. Syntax: fieldname collation (e.g name A -> sorted ascending by name , D for descending)

- **NamesToCut:** In MS Word mergefields are not allowed to be longer than 42 characters. With this setting, parts of a fieldname can be shortened to work around this limitation. Syntax: [Text to abbreviate] – [short name], e.g. parentcustomer-pc1

- **AutoNewDoc:** If you just select one row (of contact, account, a.s.o.) DCP automatically merges your template into a doc. Sometimes you don't want DCP to do so (e.g. if you want to send it as an email). In this case, set this property to **false**. Values: true, false, default (setting is overtaken from the DocumentsCorePack settings)

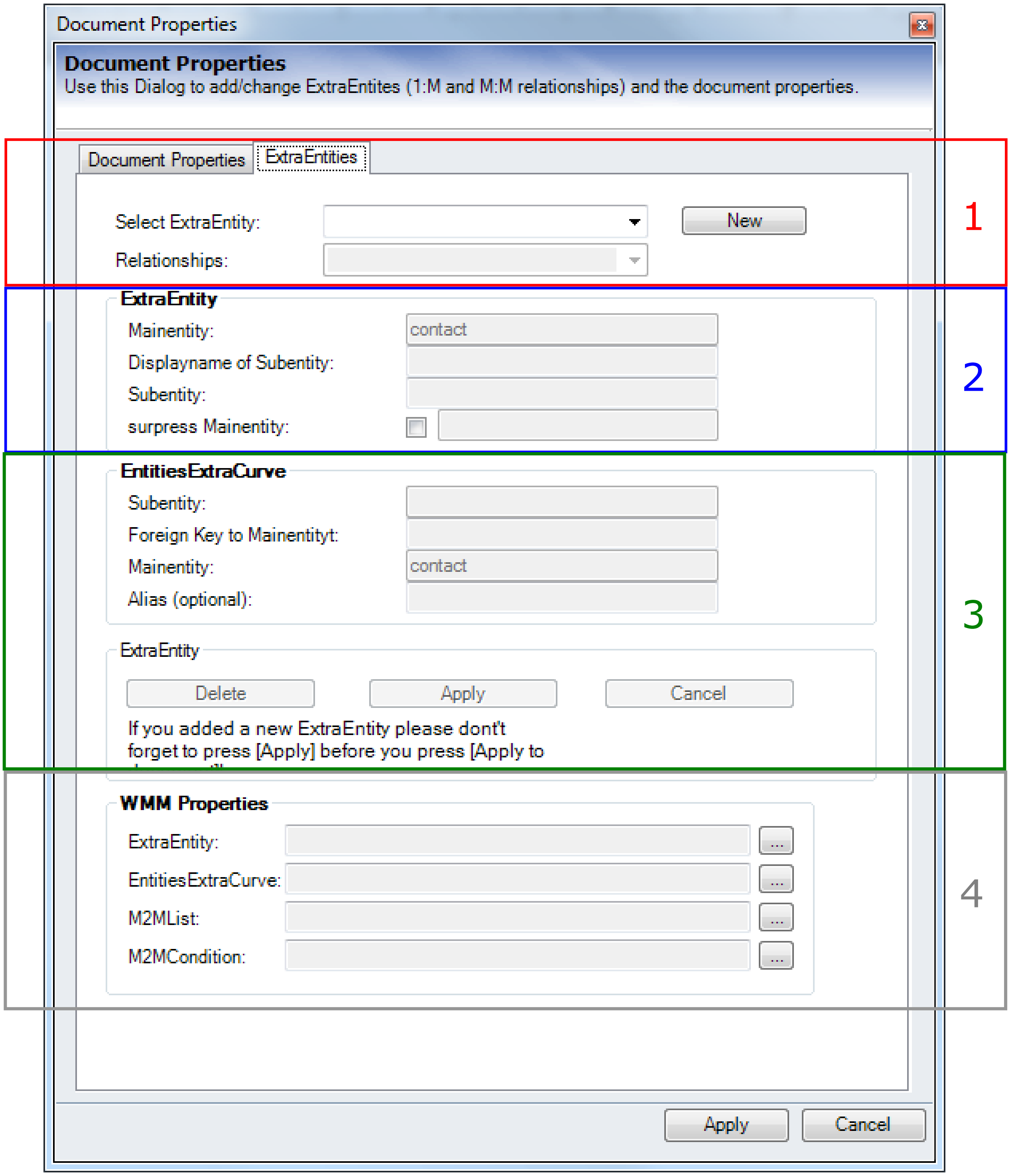
- **Send as PDF Attachment**: Here it’s possible to define static attachments that should be added to the email activity. E.g. add a “Terms & Conditions.pdf” when sending a quote as a PDF.

- **Skip Send as PDF –Filename dialog**: Allows skipping the SaveFileDialog when using the “Send as PDF” functionality.

3.5.2 The "ExtraEntities"-Tab

This tab allows resolving one – to – Many relationships. (It's possible to create M:M relationships too, but this is quite complex and requires help from our support team members)

Basically, this tab is separated into 4 areas:



1. Select / Create relationship

In this section it is possible to select an existing extra entity by choosing one out of the listbox. To create a new one press [New] and select one of the given relationships in the drop-down listbox. It is also possible to create a new relationship from scratch (only for enhanced users). After that, you are in the "edit-mode". This means that the tree button [Delete], [Apply] and [Cancel] are now active. Furthermore, some fields from the sections below are active.

2. Groupbox ExtraEntity

* DisplayName of the sub-entity: That's the DisplayName of your "new" sub-entity, as it will be shown in the tree.
* Subentity: the entity you want to show in the tree
* suppress mainentity: (this field is the same as 'Foreign Key to Mainentity' of Groupbox EntitiesExtraCurve - so please prefill this field.) Check the box if you don't want to show the main-entity in the new sub-entity. E.g. If you want to add product-details to the entity product. If you don't check the "suppress main-entity" option, the field product will be shown again in the "product details"- submenu.

3. Groupbox EntitiesExtraCurve

* Subentity: the entity you want to show additional in your tree
* Foreign key to main-entity: the attribute which is the key to the main-entity. (in XML: Referencingattribute) After you have filled in all the fields you can press [Apply] to add this 1:M Relationship to the:

4. DCP Properties Groupbox

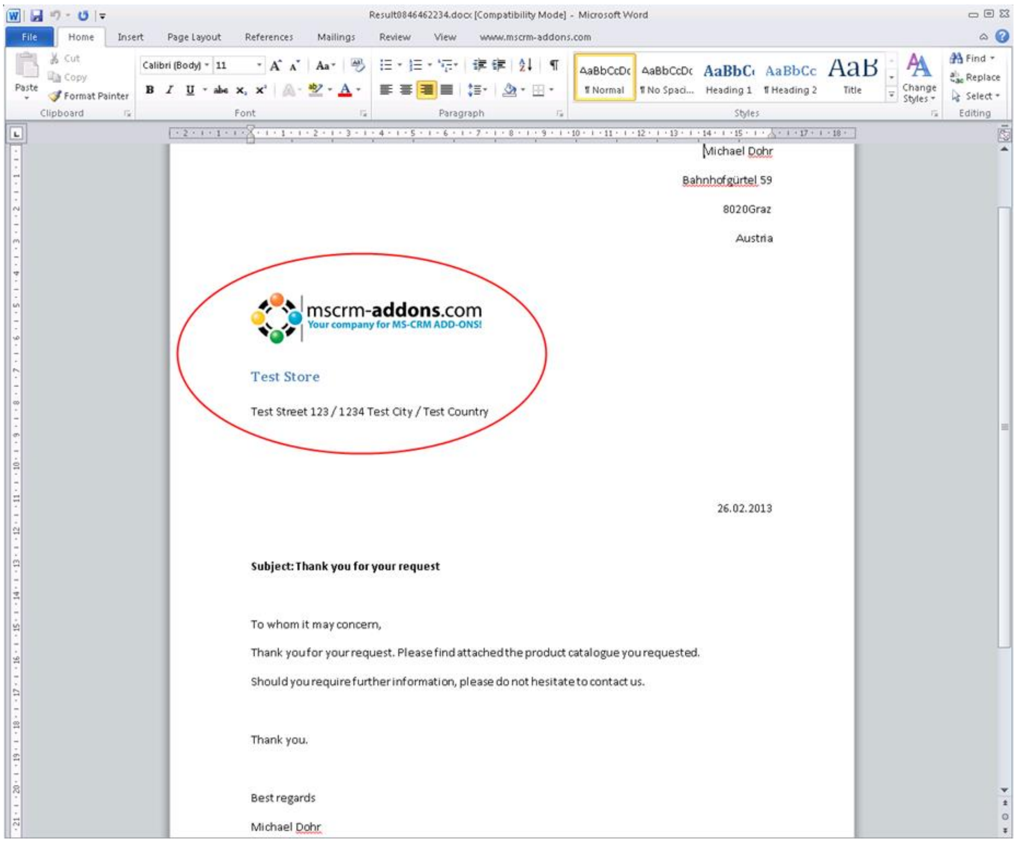
* ExtraEntity: This DCP-Prop is used to show the additional entity in the tree.
* ExtraEntityCurve: This one defines how the data is fetched out of CRM.
* M2MList: This is to create/add M:M relationships by hand.
* M2MCondition: Field to add special conditions to M:M relationships.

3.6 Insert as HTML-functionality

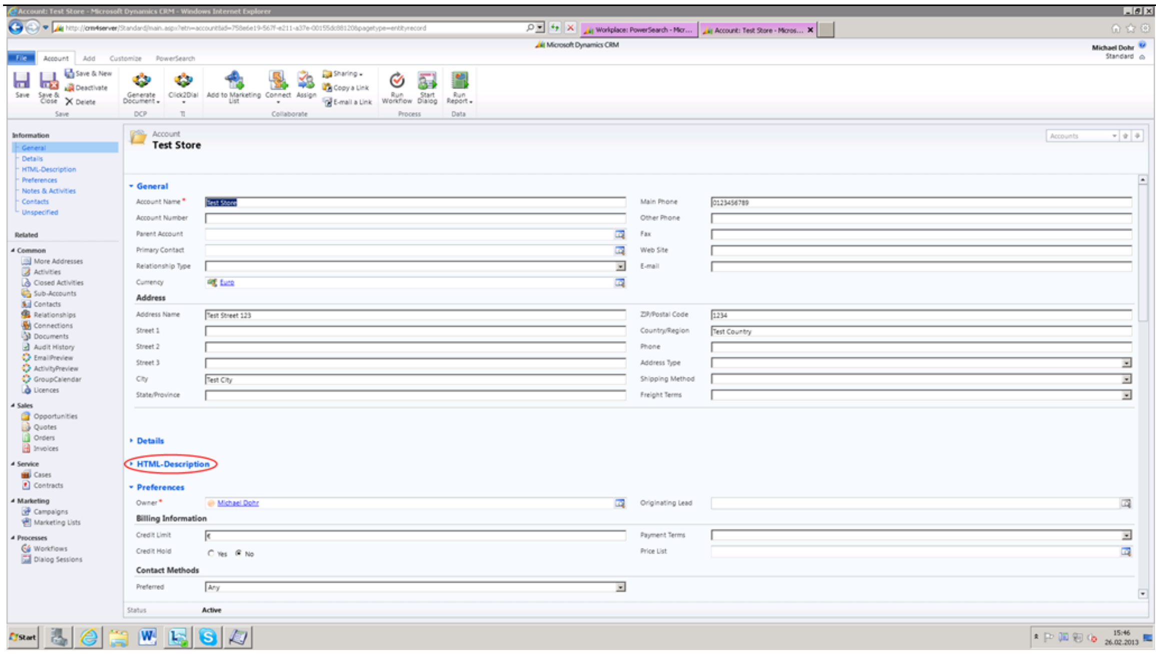
This feature enables you to easily insert contents (pictures, texts, etc.) into documents which have been added to a CRM record via an html editor. The new functionality is able to interpret html codes stored in CRM and to display the contents appropriately in merged documents. Furthermore, the last versions of DocumentsCorePack enable users to insert pictures into documents.

NOTE: Before you are able to use this functionality, you need to implement a HTML editor into your CRM system. There are various free and charged HTML editors which you can use. In our example, we work with the 'tinyMCE' HTML editor. Please follow the link to get detailed information on how to implement this free HTML editor into MS Dynamics CRM 2011.

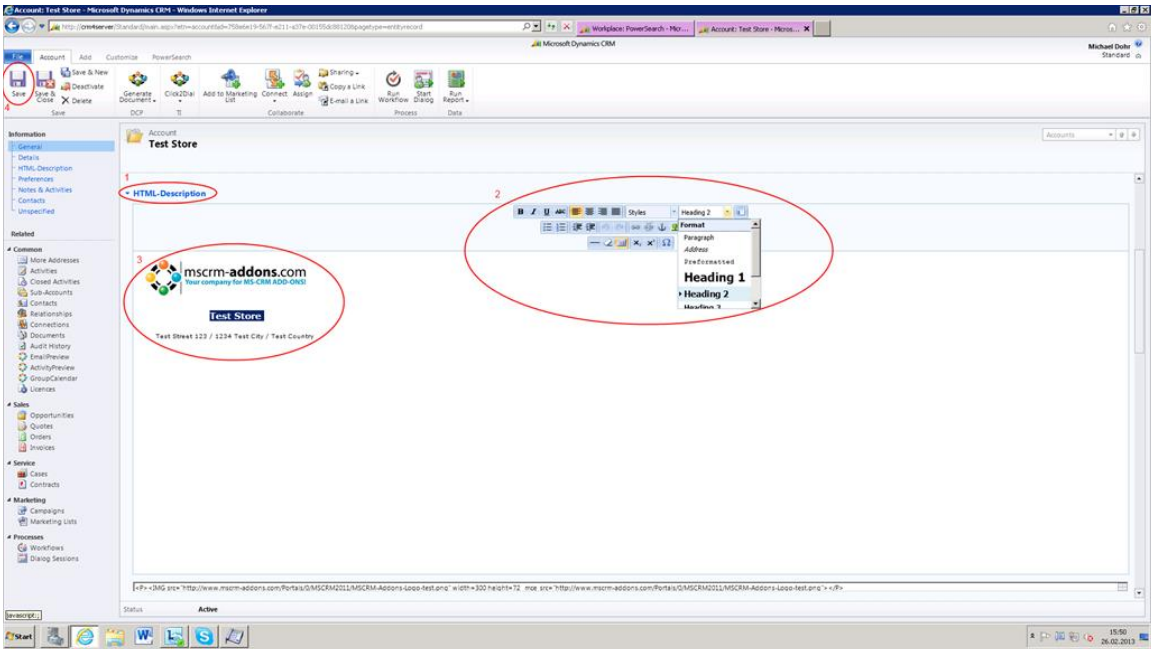
To create a document like the one in the screenshot below (content in the red elipse is the content added to the record via the html editor in CRM), please follow the steps described further down.



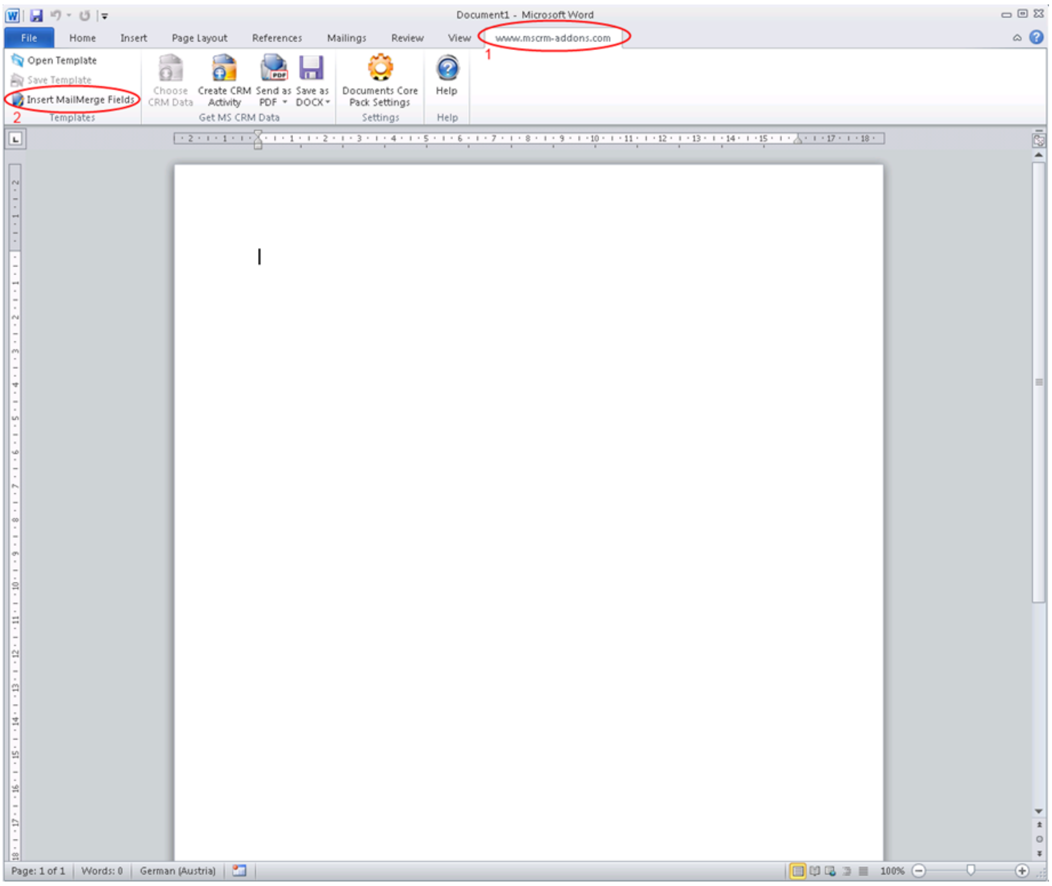
1. Open e.g. an account in CRM and click on 'HTML_Description'. After that, a HTML editor will open (see next screenshot, red ellipse).



2. By using this HTML editor, you can add and format the information you like. (see next screenshot, red ellipses 2 and 3). Click on 'Save' in the CRM ribbon (see next screenshot, ellipse 4) after you finished adding and formatting your content.

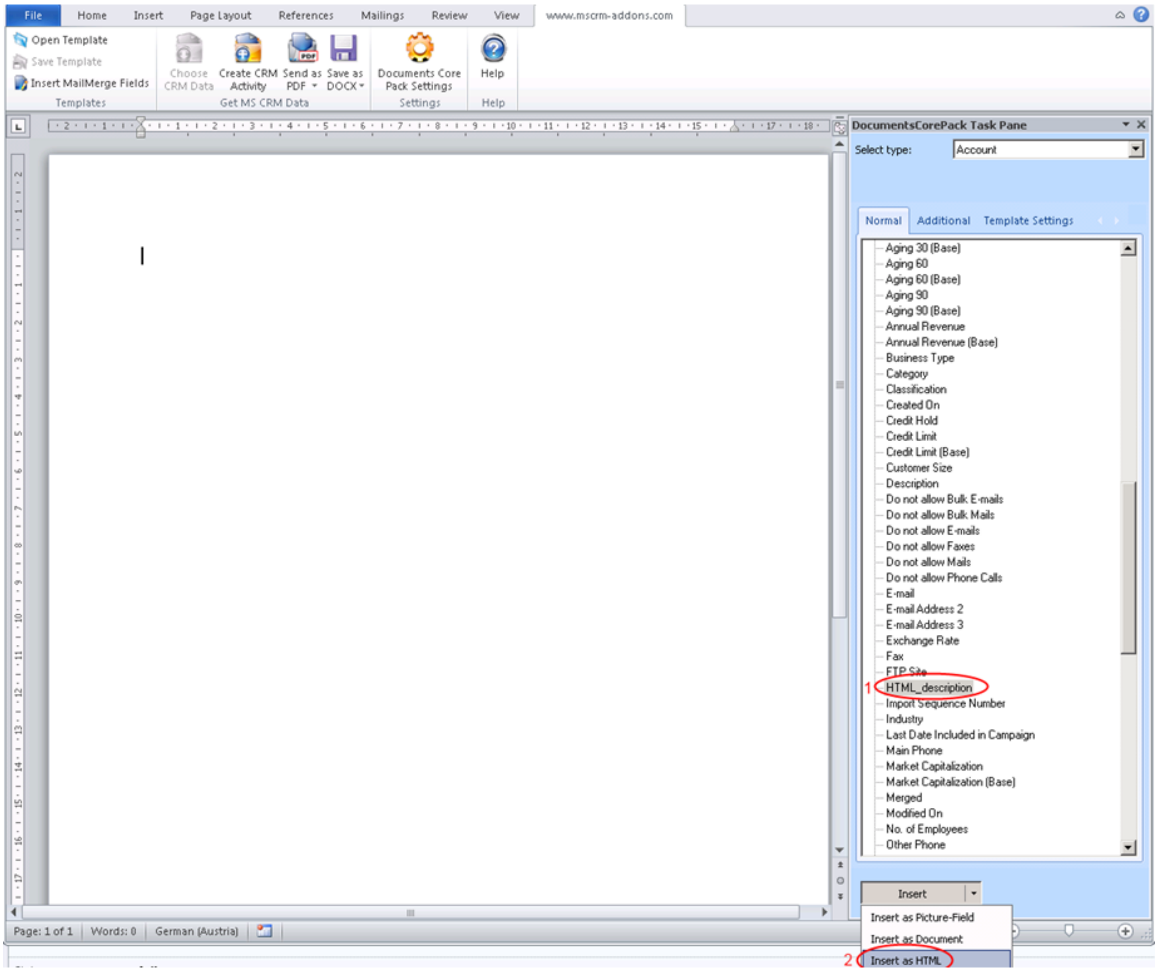


3. Afterwards, open MS Word and navigate to the www.mscrm-addons.com tab in the menu ribbon on the top (see next screenshot, ellipse 1). Here you can start to create your template. To do so, click on 'Insert MailMerge Fields' and insert the mailmerge fields you need (see next screenshot, ellipse 2).

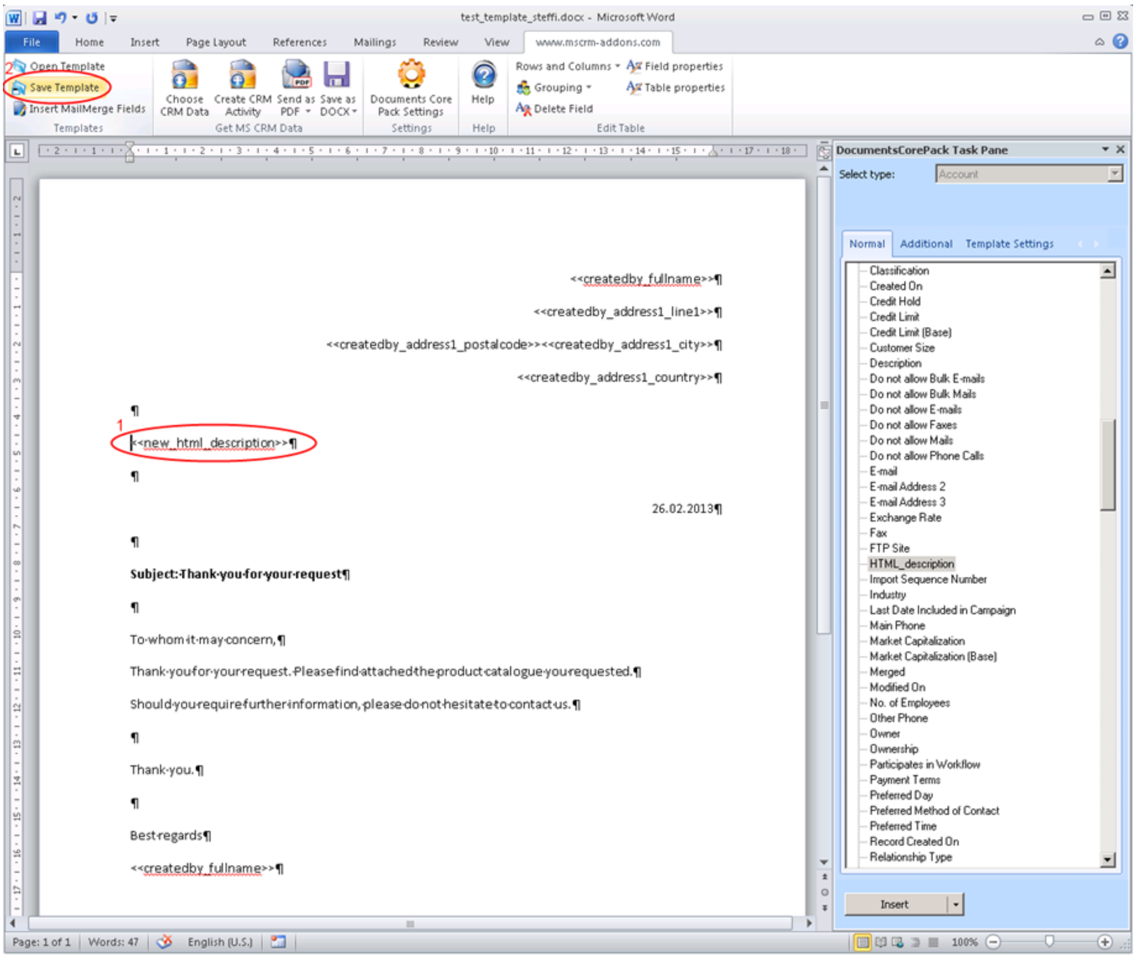


4. If you would like to insert the content which you added to the account before using the HTML editor, set the cursor to the position in the document where you want the information to be inserted.

   Then navigate to the 'Normal'-tab within the DocumentsCorePack Task Pane on the right and choose the field 'HTML_description' from the tree menu (see next screenshot, ellipse 1). Choose the 'Insert as HTML'-option from the 'Insert'-options at the bottom to add the field correctly (see next screenshot, ellipse 2).



5. After that, the mergefield 'new_html_description' is added to the template (see next screenshot, ellipse 1). Continue to create your template by inserting the mailmerge fields and the text you need. When you finished creating your template, save it by clicking on the 'Save Template'-button in the menu ribbon on the top (see next screenshot, ellipse 2).



12. After finishing and saving the template, you can start a mailmerge process to get the document including data from CRM. To do so, you have the following two options:

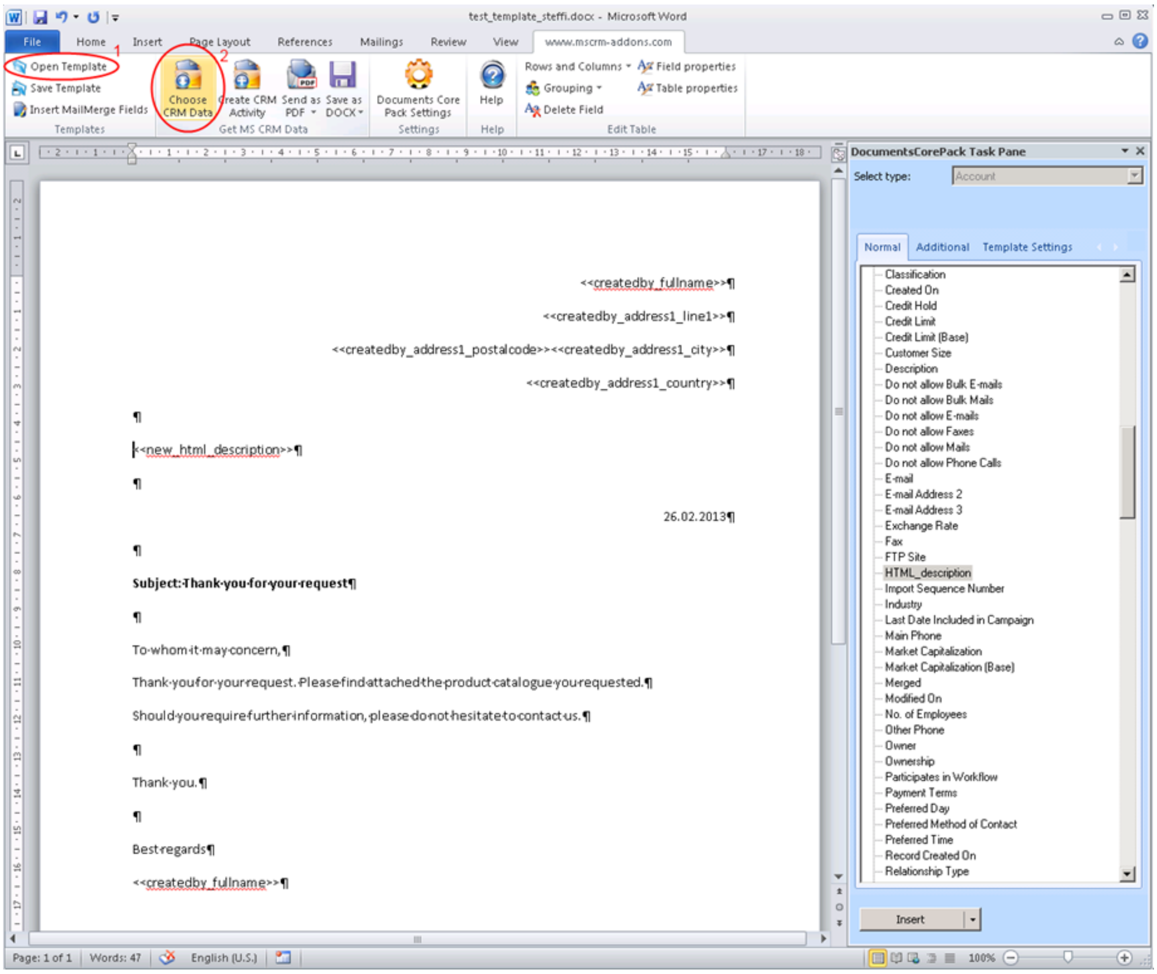
6 a Start from within MS Word

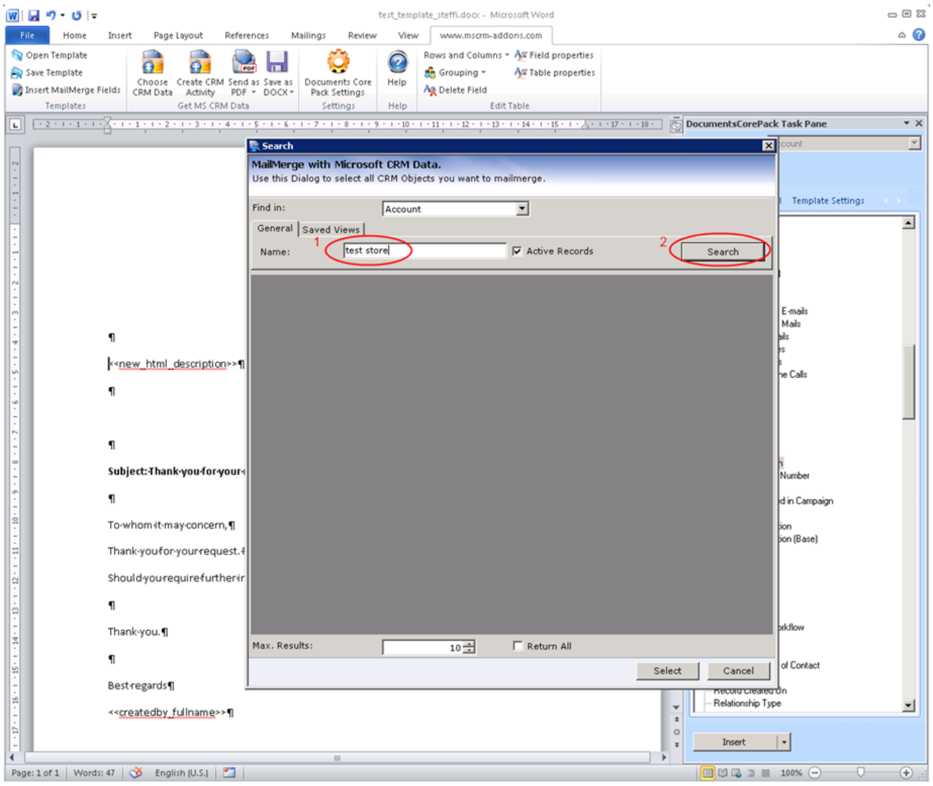
6 b Start from within CRM

Option 6 a: Start a mailmerge process from within MS Word

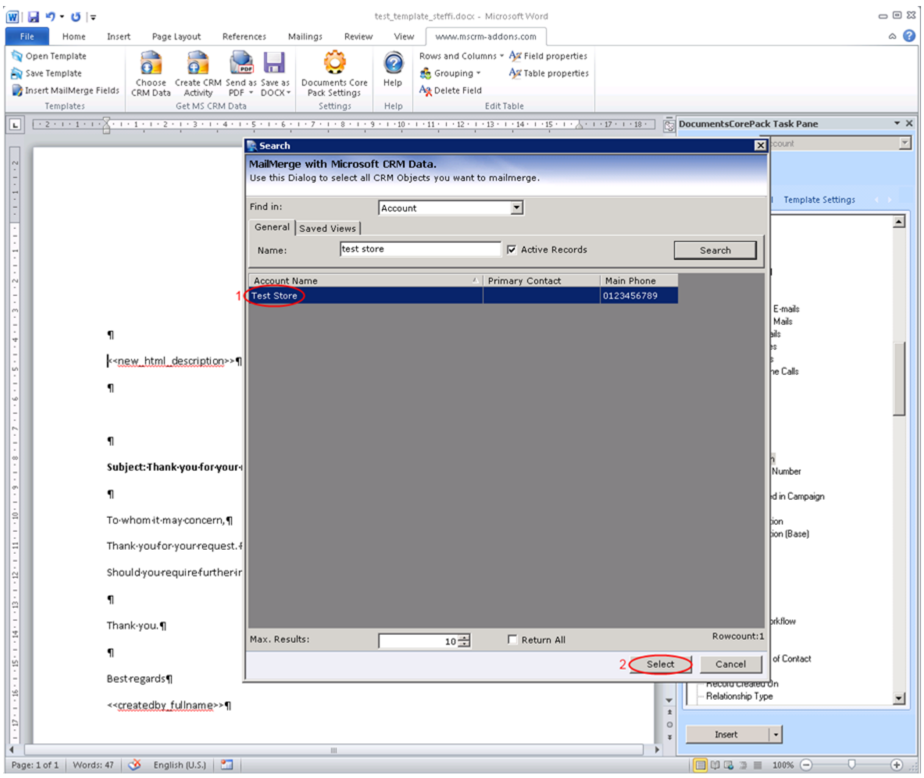
To start a mailmerge process from within MS Word open a template by clicking on 'Open Template' in the menu ribbon on the top (see next screenshot, ellipse 1). After the template has opened, click on 'Choose CRM Data' in the menu ribbon on the top (see next screenshot, ellipse 2).

A lookup-window will open. Within this window, search for/choose the account of which you need the data to be added (in this case, the account to which we added content before using the html-editor is chosen). (see next screenshot, ellipses 1 and 2).





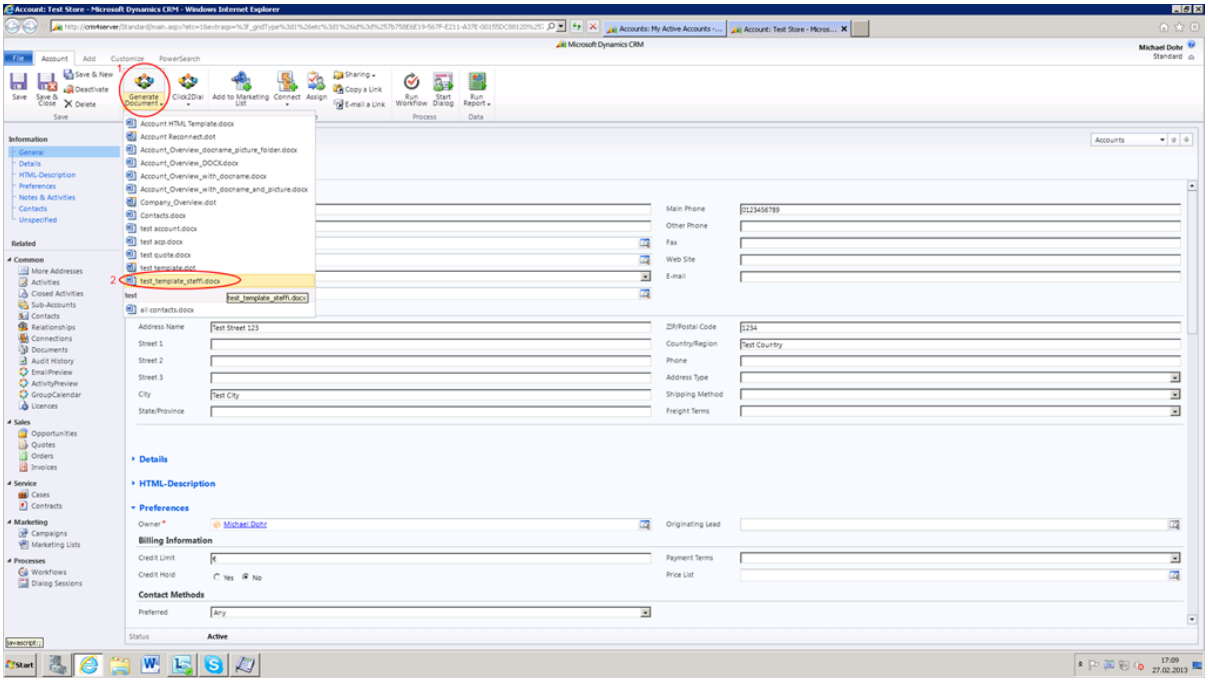
Choose the needed CRM record from the search result (see next screenshot, ellipse 1) and click on 'Select' to trigger the mailmerge process (see next screenshot, ellipse 2). After the mailmerge process, the merged and completed document will open in MS Word (see screenshot under step 7 further below).



Option 6b: start a mailmerge process from within CRM

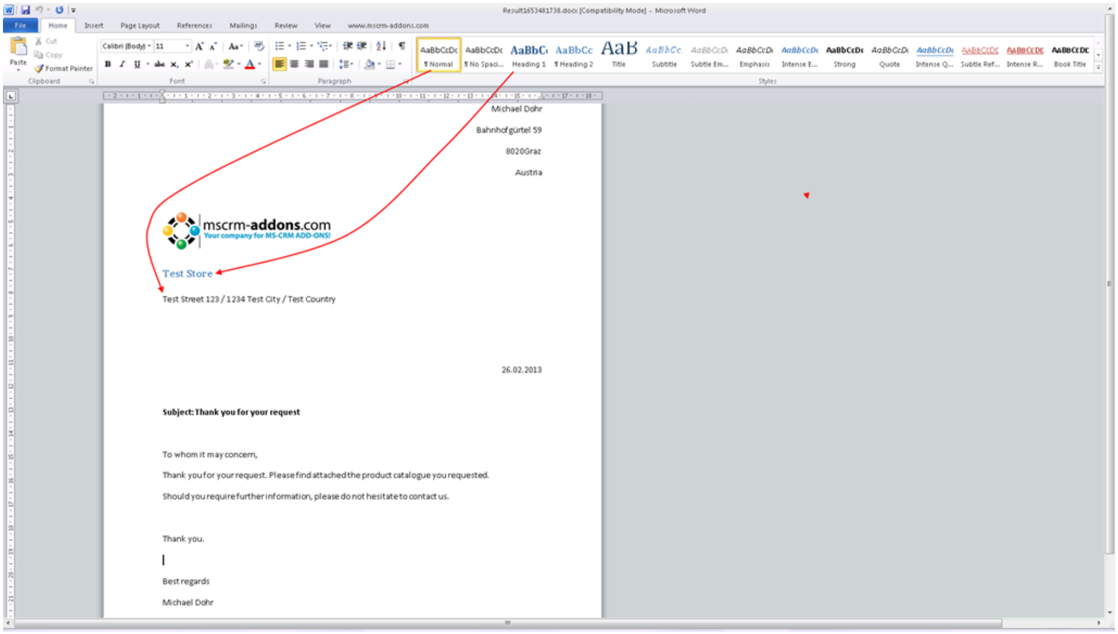
To start a mailmerge process from within CRM, open the CRM record of which you need the data to be inserted into the document. In our example, we open the account 'Test Store'. Click on the 'Generate Document'-button (see screenshot, ellipse 1; NOTE: this button is previously known as 'Print in Word'-button or may be known under another name as this is configurable by the administrator in the server-settings of DocumentsCorePack) and choose the appropriate template from the drop-down-menu (see screenshot, ellipse 2).

In our example, we choose the template we created before as described in the steps further above. After that, the merged document including the data of the CRM record will open in MS Word in the background. To view and process the document, click on the 'Word'-button in the taskbar (see the merged document in the screenshot under step 7 further below).



13. After the mailmerge process, the document including the data from the CRM record and in this example also the content added to the account via the html editor is available for further processing. As you can see in the screenshot below, the style of the text parts corresponds to the style sheets of MS Word.

In our example, we chose the style 'Heading 2' for the text 'Test Store' and the style 'Paragraph' for the text 'Test Street 123 / 1234 Test City / …' using the html editor. In the merged document, the text parts are displayed corresponding to the settings of the style sheets of MS Word (see next screenshot).



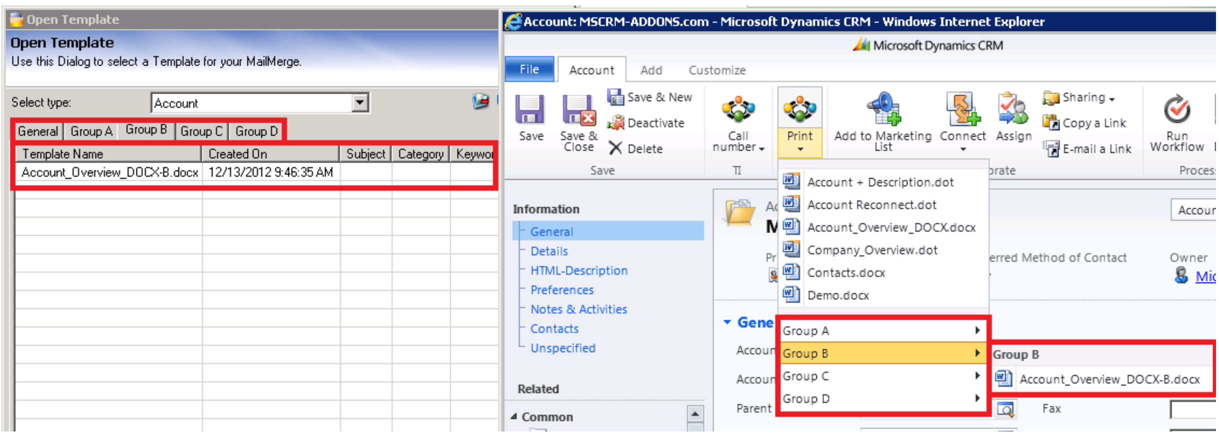
3.7 How to filter group-templates

This new feature offers the possibility to set a filter for DocumentsCorePack templates. Templates are filtered based on the template-group they are assigned to. Applying this One single template-group. This prevents users from getting confused by a variety of available templates as they can only see and select templates of the corresponding template-group defined by the applied filter.

To take advantage of this new feature you need at least both of the following versions:

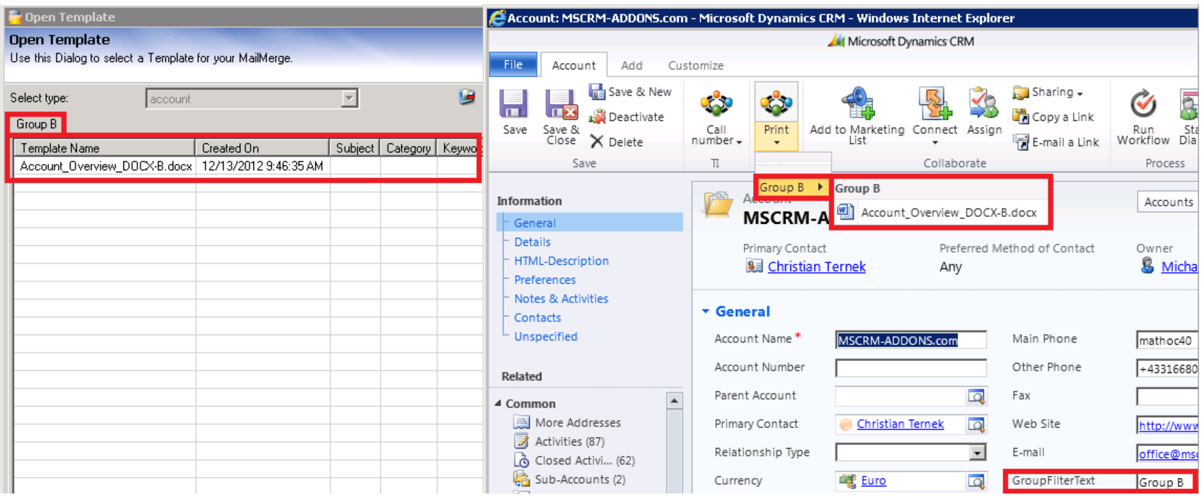
- DocumentsCorePack Server for MS CRM 2011 5.36
- DocumentsCorePack Client for MS CRM 2011 5.73

Specification
DocumentsCorePack templates can be organized in groups. These groups are shown as separate tabs in the "Open Template" dialog and are also available as sub-items in the Print in Word flyout button (see screenshot below, red squares).



To improve the DocumentsCorePack-usability for end-users, you can set a filter for these template-groups in the DocumentsCorePack server configuration. Applying this filter limits the available templates in the template selection menu of a CRM record to just one specific template-group (see screenshot below, red squares).

Therefore, users do not get confused with a variety of available templates as they can only see and select templates of the corresponding template-group defined by the applied filter.



The screenshot above also shows the field which contains the filter criteria (attribute) for this record (see screenshot, 'GroupFilterText'-field at the bottom on the right). In this example, only templates of the template-group 'Group B' are displayed and can be selected within the Print in Word flyout button.

The following paragraph describes how to configure this feature.

ATTENTION: This feature only works for single records and is not enabled for bulk merges of documents as different records can have different filter criteria!

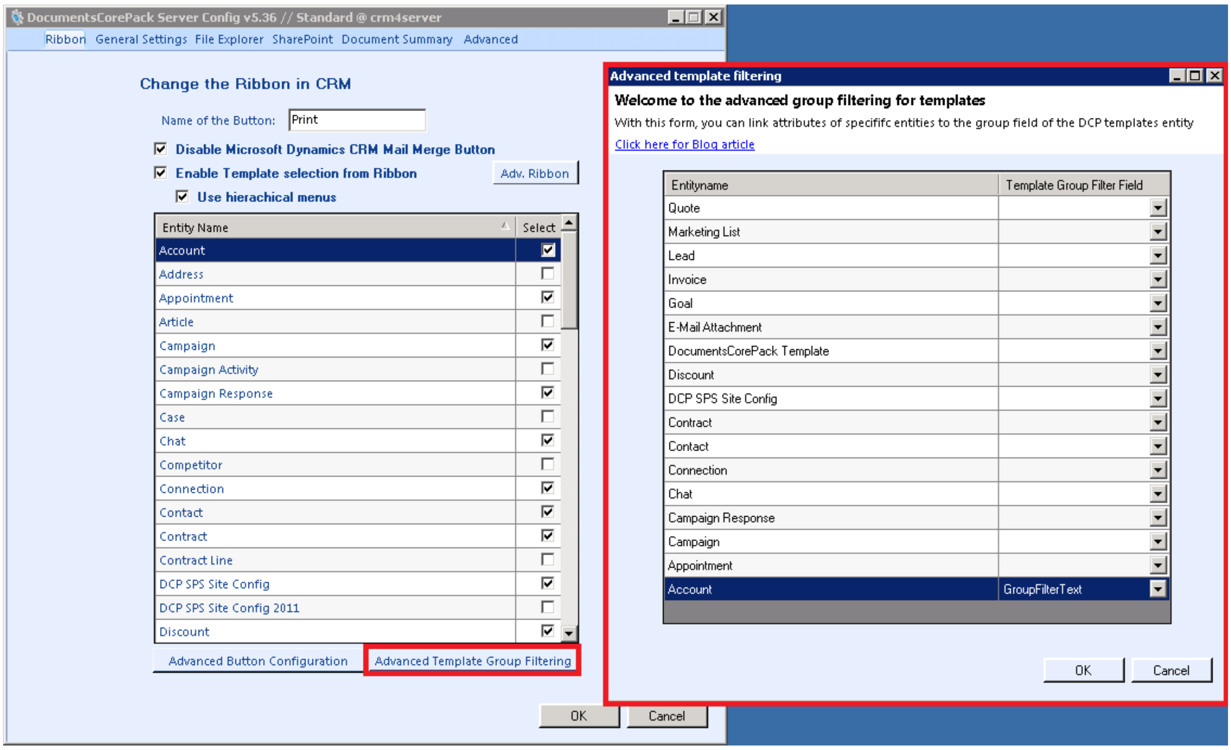
Configuration

Start the DocumentsCorePack Server Configuration Tool and click on the additional button below the Print in Word entity selection window which is named "Advanced Template Group Filtering" (see screenshot below).

After clicking on this button, a new window opens. This window displays all entities that have been configured to show the Print in Word button.

Here, you have the possibility to configure the feature for the template-group filtering. To do so, select the entity that should be used to filter the template-groups. After that, choose a text attribute of the selected entity. e.g. The configuration shown in the screenshot below enables the filtering process for the "Account" entity based on the value of the attribute "GroupFilterText" which is defined within each CRM record individually. This example corresponds to the result in the specification section above.

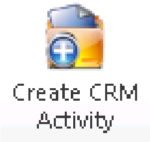
If you look at the first two screenshots of this chapter, you can see that you can define which template-group should be displayed within accounts. In our example, we defined to only display templates of the template-group 'Group B' for the account 'MSCRM-ADDONS'. Therefore, we typed in 'Group B' within the 'GroupFilterText'-field within this account. After saving the changes and when opening the Print in Word flyout button within this record next time, only templates of the group 'Group B' will be displayed (as shown in screenshot 2).



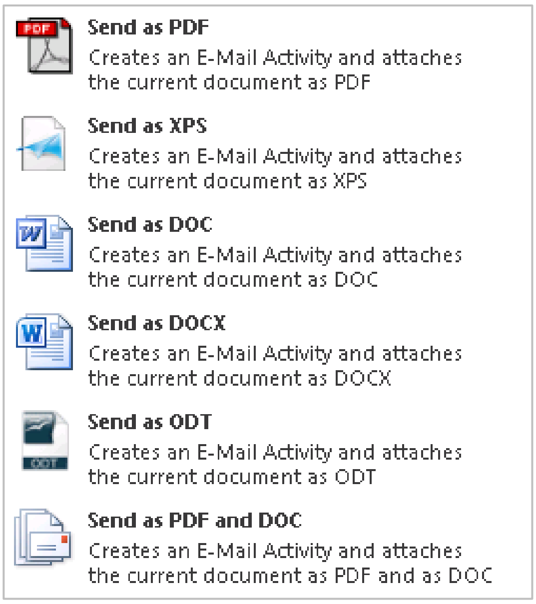
4 Generate and save documents back to CRM

In this chapter we will take a look at the three possibilities to store generated documents back to CRM:

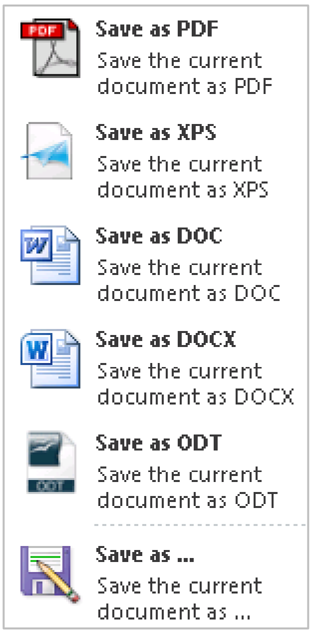
1. **Create CRM Activity**



2. **Send as PDF, XPS, DOC, DOCX, ODT, PDF and DOC**



3. **Save as DOCX, PDF, XPS, DOC; ODT**



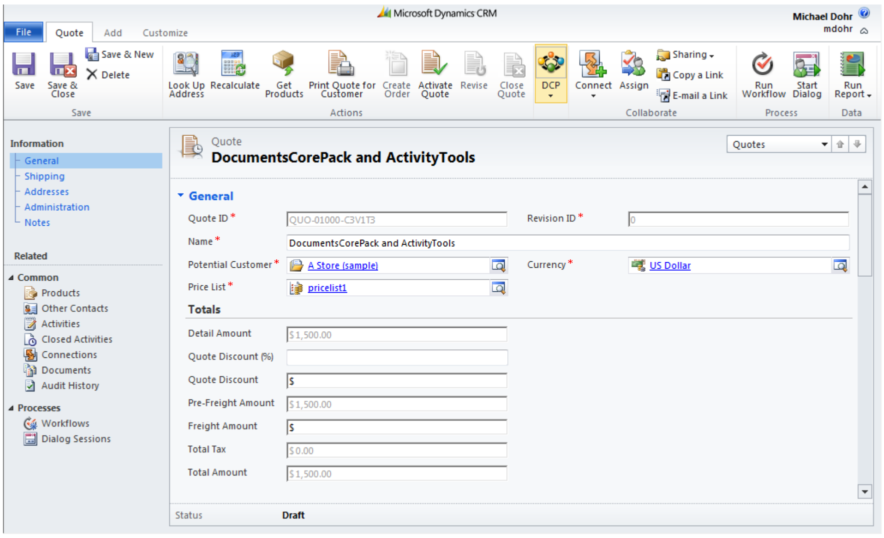
We will work with the templates included in the setup and explain all options step-by-step.

After doing that, the Word-document will be accessible in MS CRM and you are able to e.g. send an email with the PDF-document attached.

4.1 Generate a Document - Step by Step Description

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

First, we need to generate a document. Open the CRM-Record for which you want to generate the document. A merge can be directly started out of CRM with the "Print in Word button" which is placed at the CRM menu at the top. It is accessible from the grid view in order to select multiple records at once. And next to this, in the menu of the record itself.

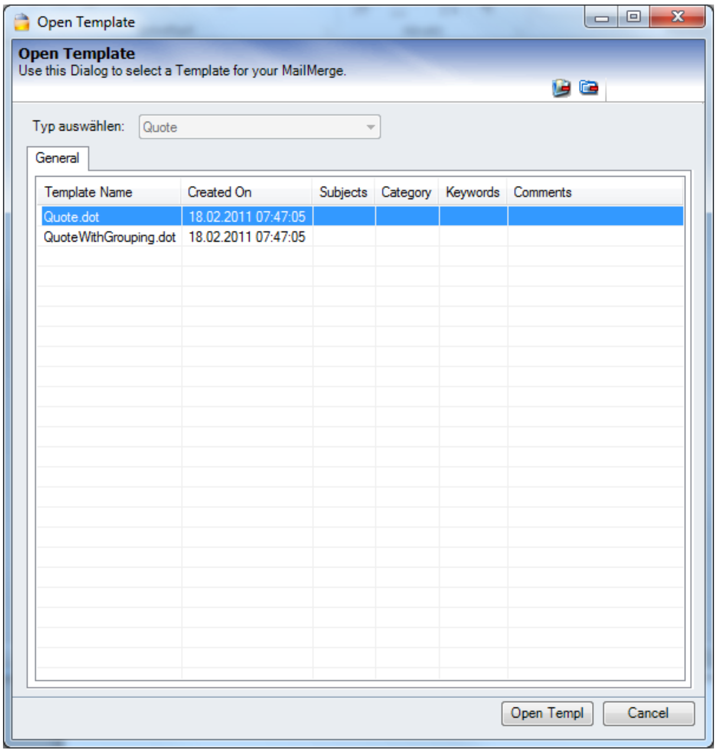


We search and open the CRM-record we want to create a document for and start with a click on "Print in Word". In our case we will use a quote

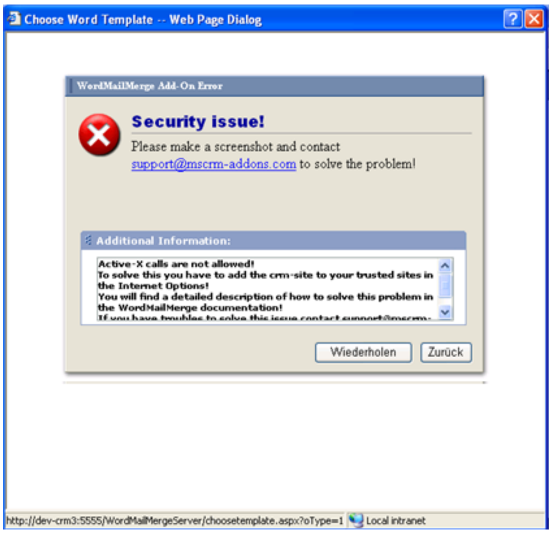
Step 2: Select a template

Click on the drop-down "Print in Word" Button in the Menu and select the template. After chosen your template it will be opened in Word.

A window appears which allows you to select the template you want to use. Choose a template and proceed with a click on "Open Template".



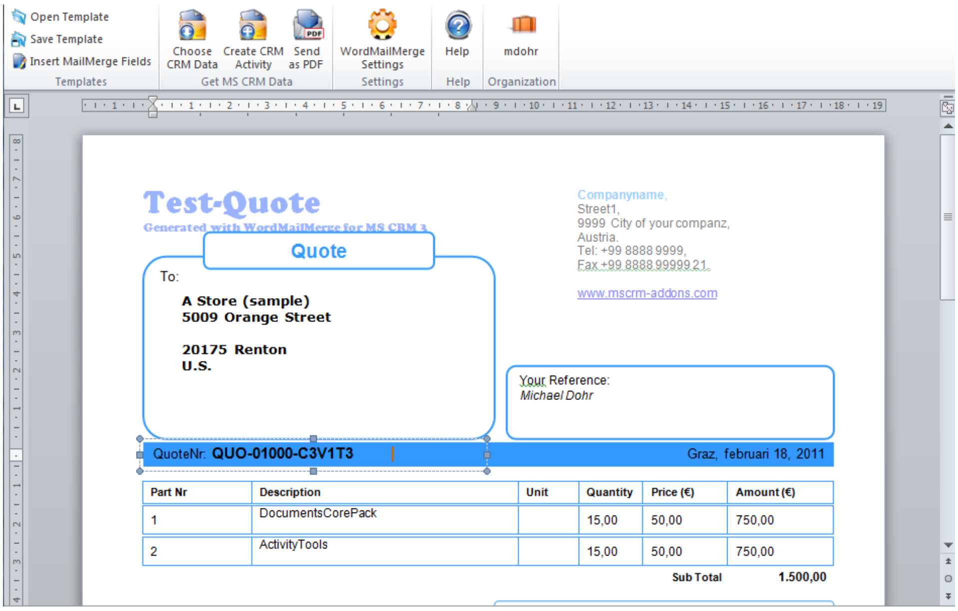
PLEASE NOTE: If you receive the following 'Security issue', open the installation guide and go to chapter 7 (Installing the client component/prerequisites). There, you will find a description of what you have to do to solve this issue.



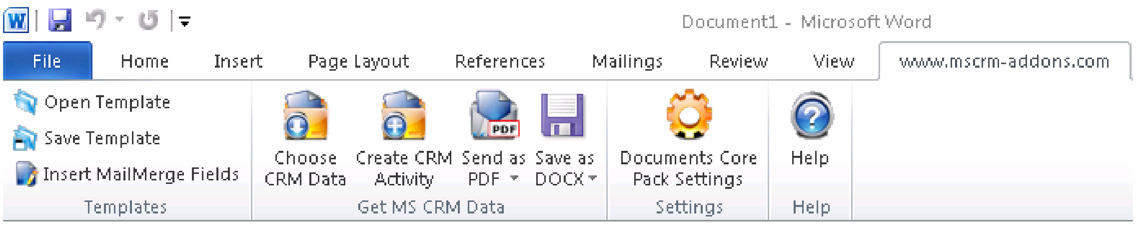
Step 3: Result

Once this is done it will start to load the data and create a new document. (See screenshot below). You can see the information of the recipient at the top, the list of line-items referring to the quote,

As result you get a quote which has already replaced the merge fields with all the data out of the MS CRM.



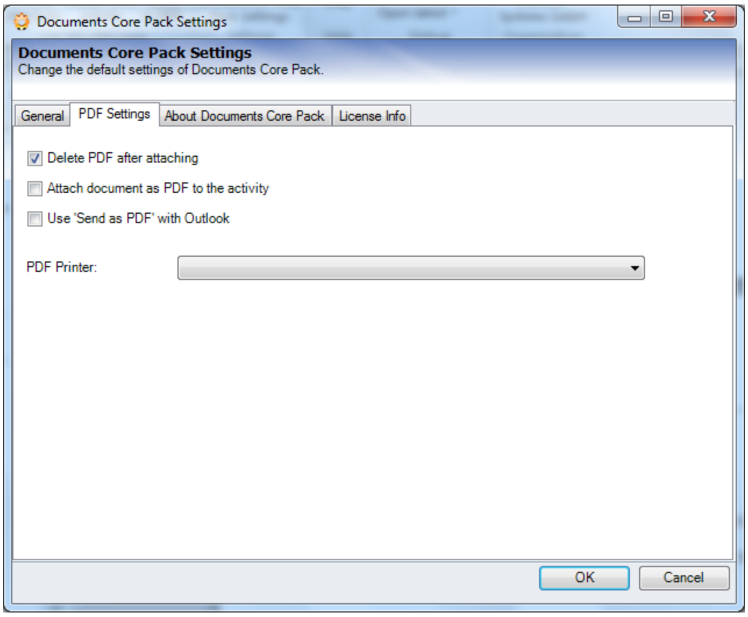
Now, the document is ready and we proceed at the www.mscrm-addons.com – ribbon at the top. (See next screenshot).



It 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, for example 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.

4.2 Send as PDF

INFO: PDF-settings
These settings can be accessed in MS Word->WordMailMerge Settings->PDF-settings (2^{nd} tab). Here we can define which PDF-printer should be used, how the temporarily saved PDF files should be handled and whether Outlook should be used to send the email or not.

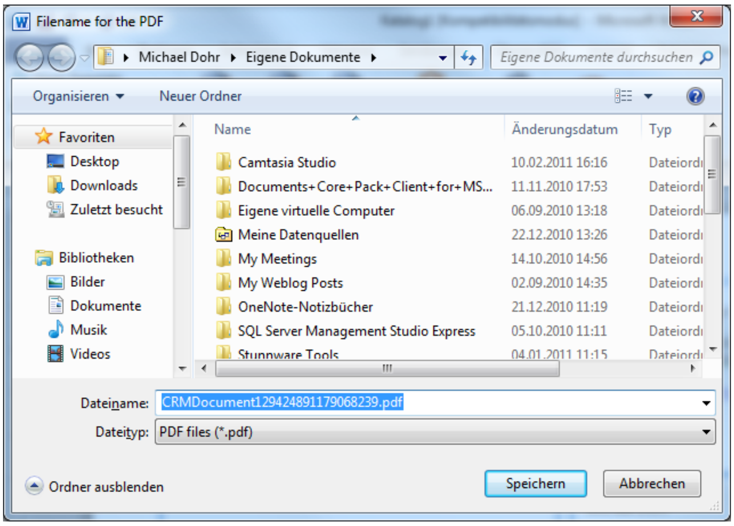


aPDF Printer:

- MS Office Save as PDF Add-In for Office 2007 / 2010 (free Download)
- PDF Creator (free Download)

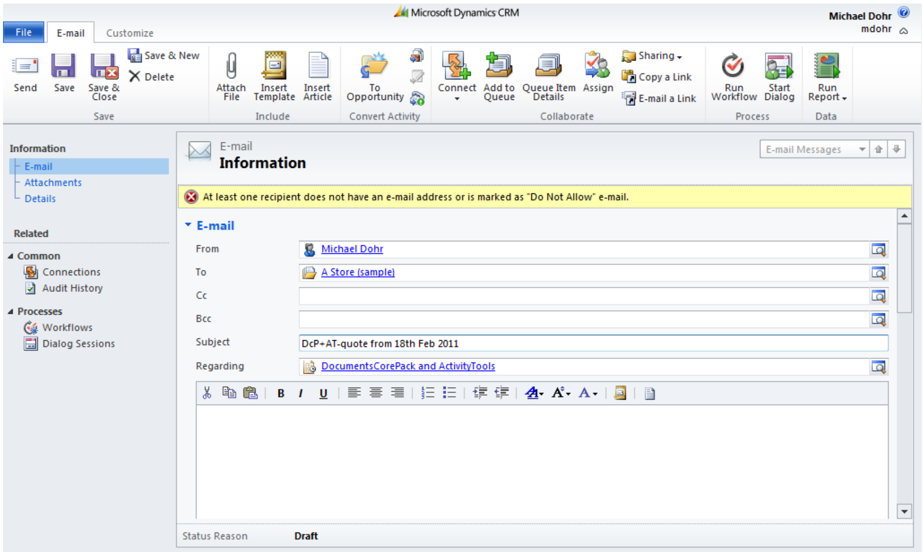
Step 1: Click on "Send as PDF"
Click on the button.

Afterwards, a "SaveFile-dialog" will appear that allows us to choose the name for the PDF-file and the location where it should be saved temporarily.

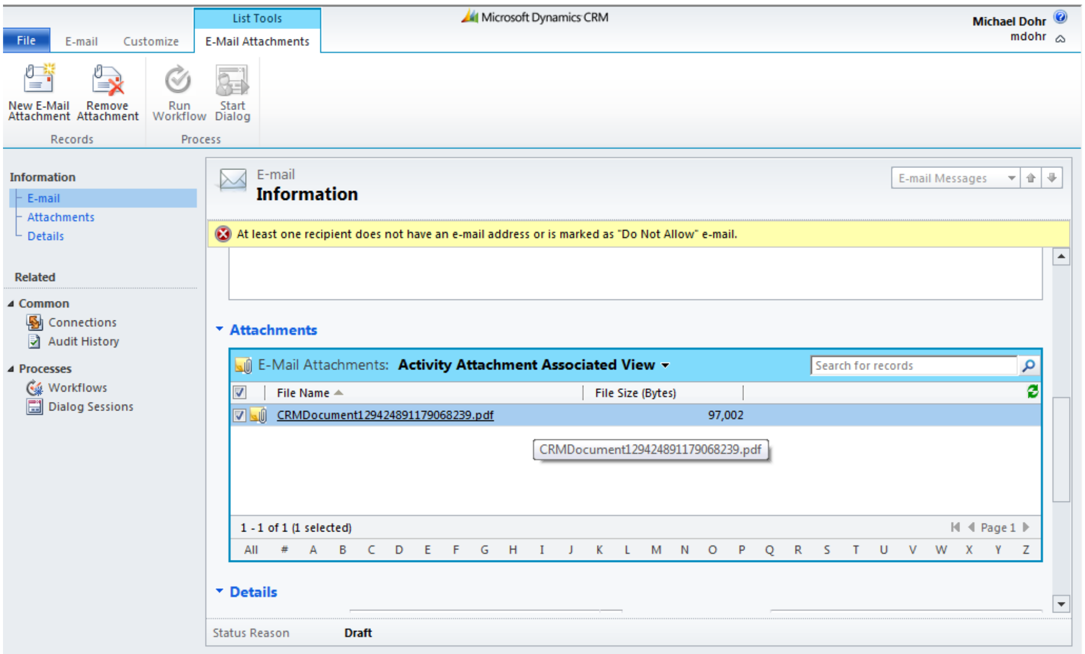


After clicking [Save], DCP will automatically generate the PDF and will create and bring up a new email-activity with the PDF-file attached.

Step 2a: Result – "use Send as Pdf with Outlook"- UNCHECKED
The following window appears and we can now add email-content before sending the email with the attached PDF.



In the "Attachment"-section below (shown in the next screenshot), we will see the attached PDF-file.



Step 2b: Result – "use Send as Pdf with Outlook"- CHECKED
In this case, a new email will be opened in Outlook. (For more information, please read chapter 6 "Sending Mails via Outlook"). Or click on the E-Mail-Tap at the top and send it to the customer.

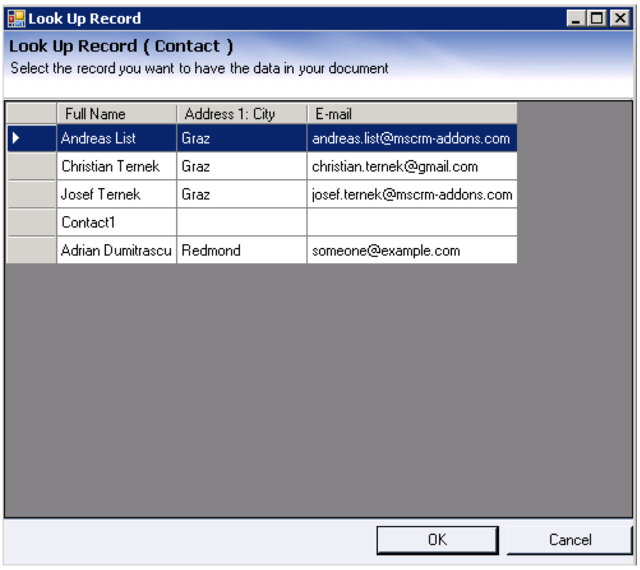
4.3 How to pre-filter result rows before generating a document

We have created a new function offering the possibility to use a dialog to pre-filter the result rows. This will be helpful when the user needs to select a specific related entity (e.g. contact, ...) before starting to generate the document.

This feature is available with version 5.26 upwards and only for DOCX-templates.

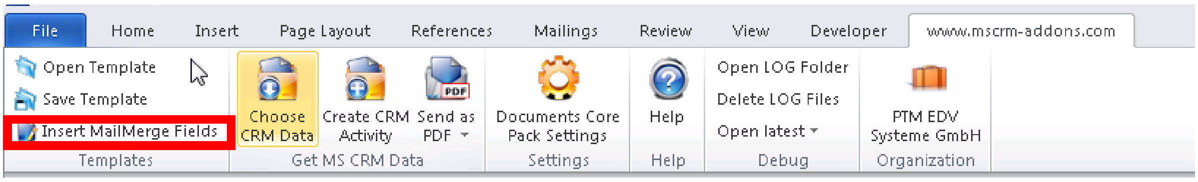
After the configuration steps described below, the users will get a "Look Up Record"-window (e.g. like the one in the screenshot below) when opening the DocX-template. In this window, they can choose one or more of the pre-filtered records and afterwards start to generate the document.

In the example shown in the following screenshot, users can select one or more contact(s) of an account. Afterwards, they are able to generate the documents with the selected contact(s).

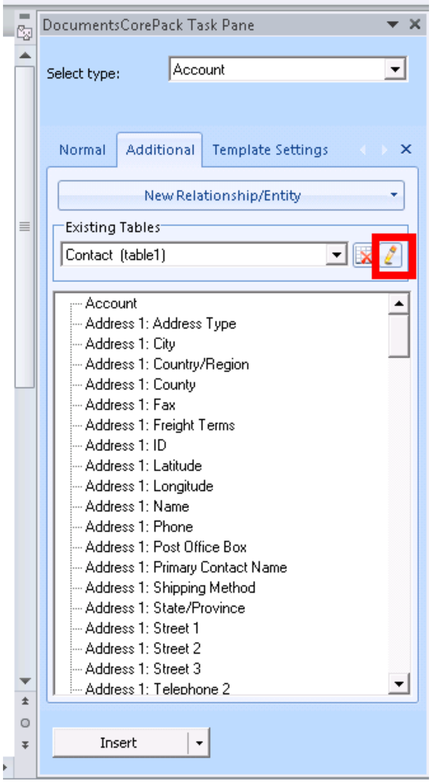


How to set this up in the template:

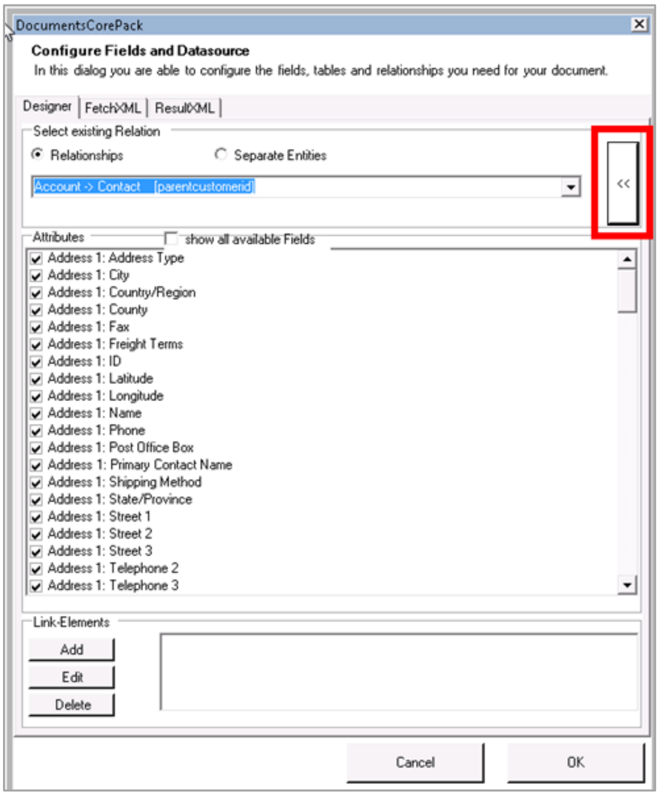
First, you have to open the template and to click on “Insert MailMerge Fields”.



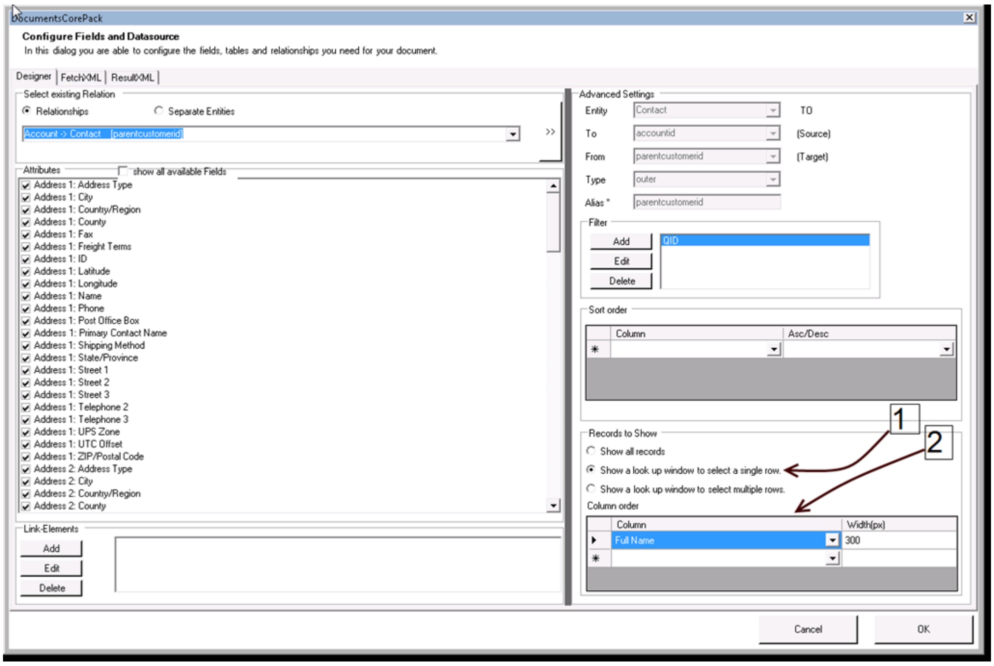
Go to the additional tab, select a relationship and click on the “edit”-button. This is the base for the filtering process.



Click on the red marked button to get to the advanced settings.



In the "Records to Show"-section of the window you can choose if you want a selection and which type. (single or multiple, see arrows in screenshot)



The "column order"-section enables you determine the order and the width of the columns within this lookup window.

4.4 How to filter linked entities during a merge process

It is possible to filter the linked entities of a 1:N and a N:N relationship during the merge process based on their IDs. This works in combination with DocumentsCorePack and AutoMerge but only with "docx"-templates.

To achieve this, you have to create a new record of the "MSCRM-ADDONS.com User/Temp Settings" entity containing a filter.

Name
Use the "Name"-field to define for which user, entity type and record ID the filter should be used.

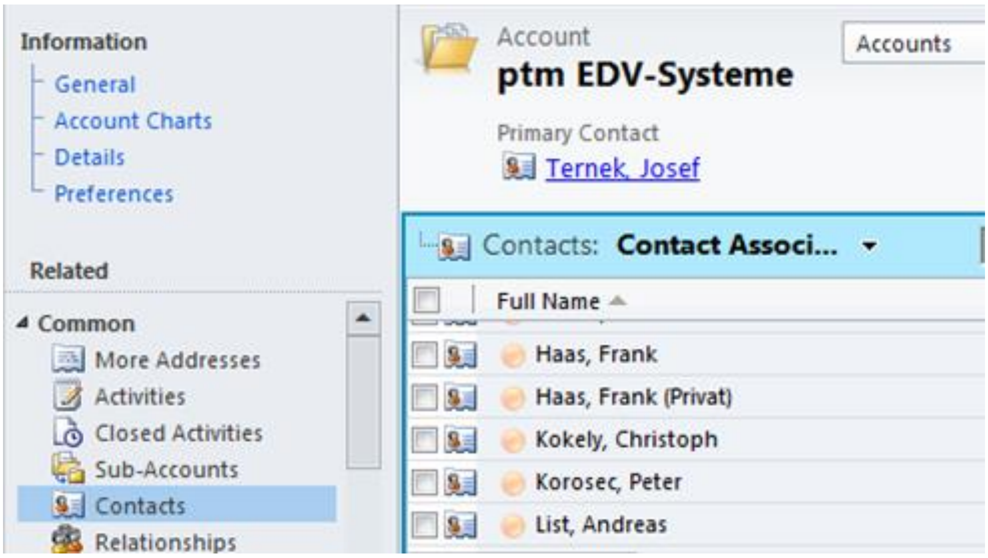
- **Structure:** AMPreFilter|<<ID of the user who should use the filter>>|<<the logical name of the starting entity of the template>>|<<ID of the record (of template starting entity) for which the filter should be used>>|<<logical name of the linked entity which should be filtered>>|
- **Example:** AMPreFilter|{DC9B80F8-C781-46D8-9FD6-A3B610836975}|account|{7b069E5412-84F6-E111-977B-00155DC8AE09}|contact|

Value
Use the "Value"-field to define the IDs of the linked records which should be shown in the template.

- **Structure:**
  <filter>
  <entity><<logical name of the linked entity which should be filtered>></entity>
  <values>
  <value><<ID of linked record which should be shown>></value>
  <value><<ID of linked record which should be shown>></value>
  …….
  </values>
  </filter>
- **Example:**
  <filter>
  <entity>contact</entity>
  <values>
  <value>{12E5214A-88BF-E111-A7C1-00155DC8AE09}</value>
  <value>{12E5214A-88BF-E111-A7C1-00155DC8AE09}</value>
  </values>
  </filter>

Important: The IDs must be in upper case and must contain brackets.
During each merge process of "docx"-templates, the DocumentsCorePack Client or the AutoMerge add-on looks for a suitable filter. If such a filter is found, only linked records with a matching ID will be shown. The filter gets delete afterwards. Otherwise, the usual merge process remains unchanged.

Example
Here you can see an account named "ptm EDV-Systeme". It has several contacts related.

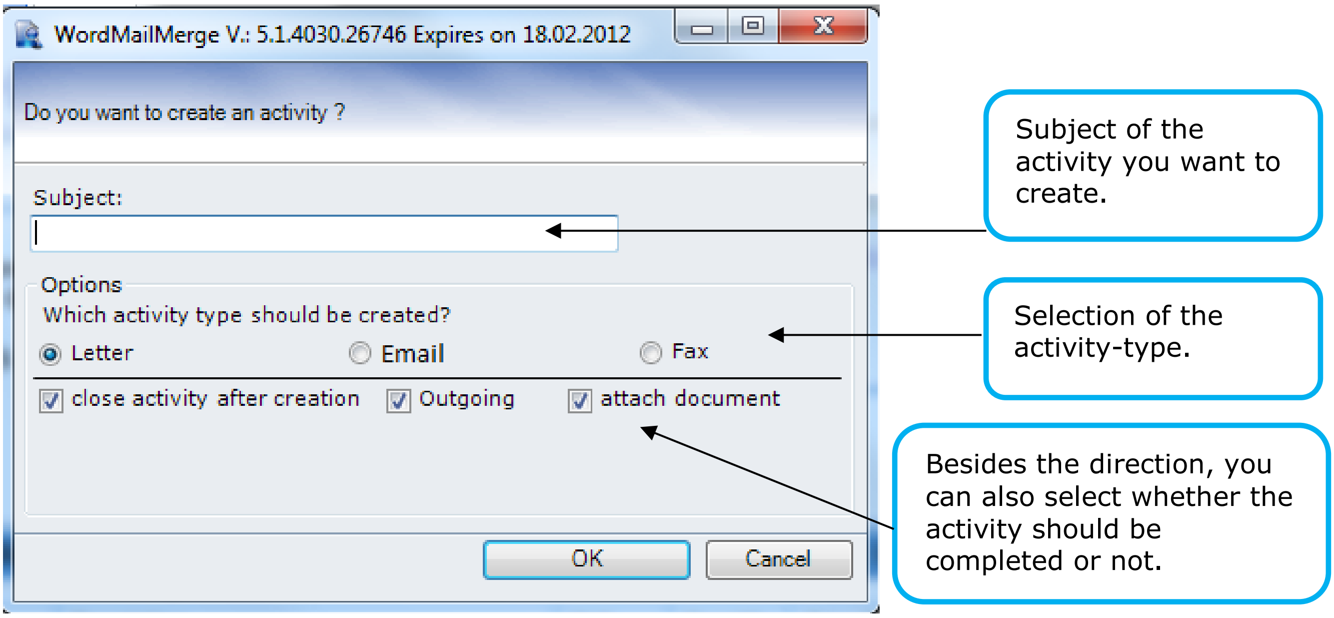


By using the following filter, only contacts which match the GUIDs in the filter will be shown in the result document. The defined user-GUID and the user running must match as well.

4.5 Create CRM Activity

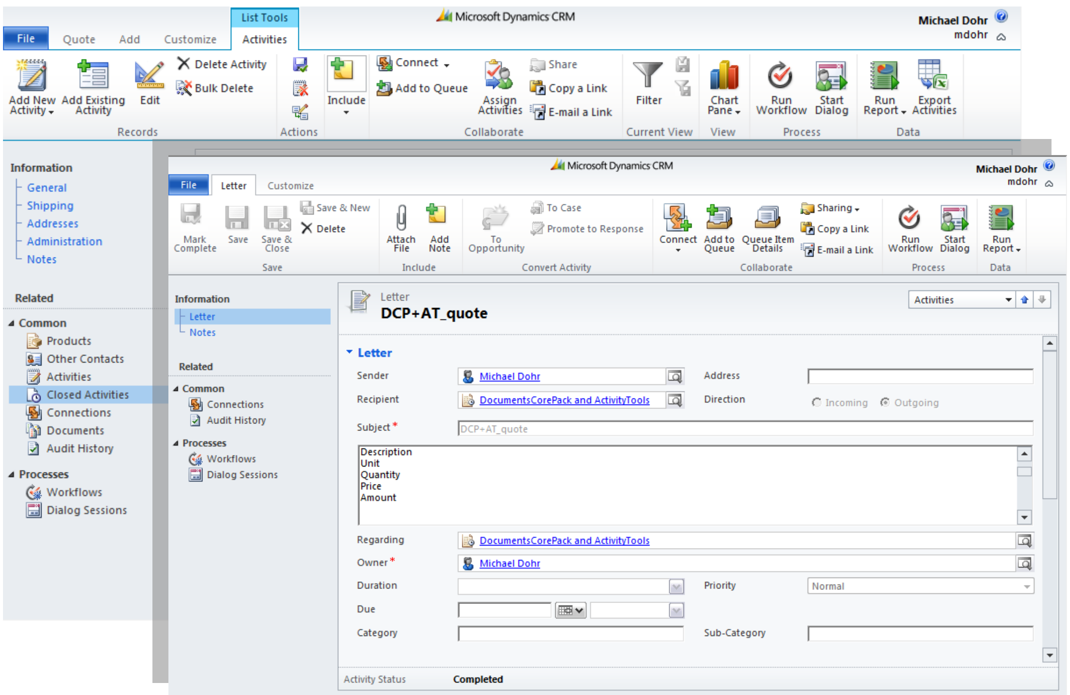
Next to the “Send as PDF”-option, DCP provides the possibility to Create letter-, fax- and email-activities with the document attached.

The following dialog will pop up after pressing the [**Create CRM Activity**]-button:



If you want to create a new activity for a document where an activity has already been created, you'll see a dialog that allows to select whether to create a new activity, add the document to the existing activity or to replace the existing document with the new one.

Result



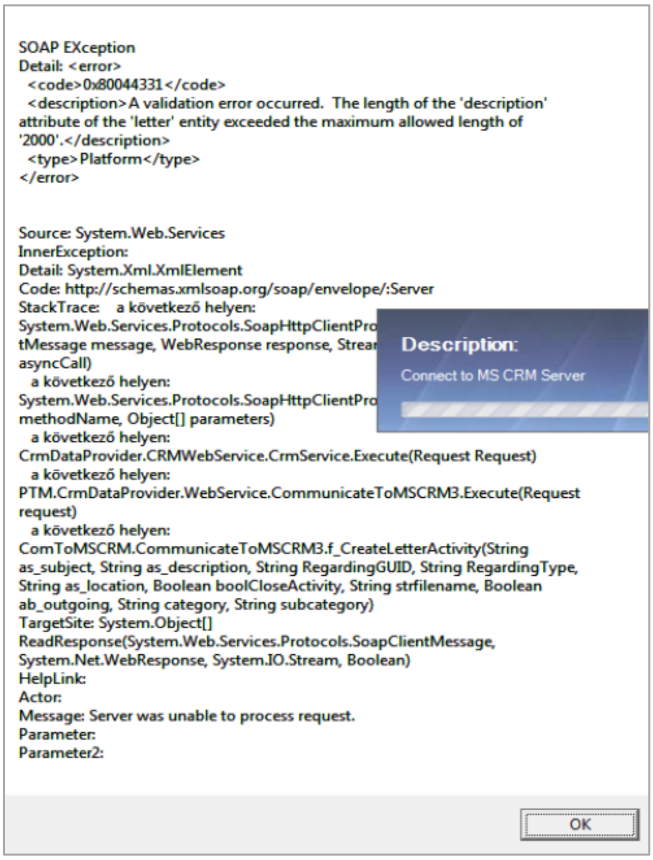
The Word-document has been added to the "Notes" tab.

INFO: When using SharePoint or the FileExplorer integration, the document will be saved to the specified location and the activity contains a direct link to the document.

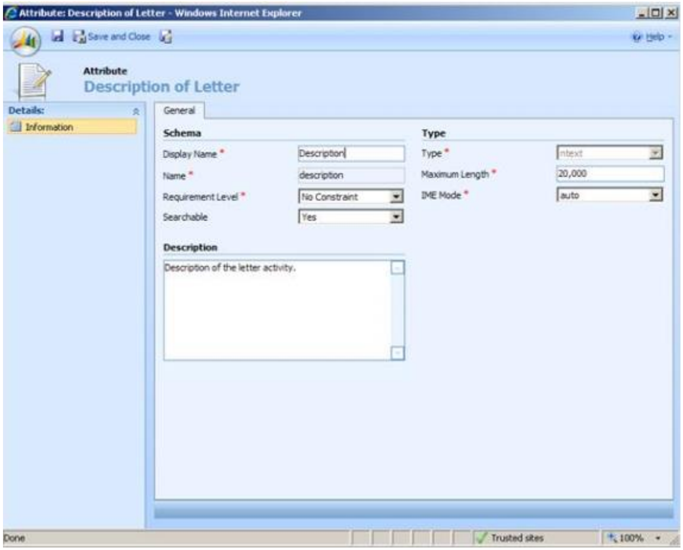
4.5.1 Troubleshooting: how to extent the length of the CRM "description"-field

The length of the CRM "description"-field is limited to a maximum length of 2000 characters. Following window will pop up if you try to create a letter activity and its description exceeds the maximum length:

Fail: Soap Exception



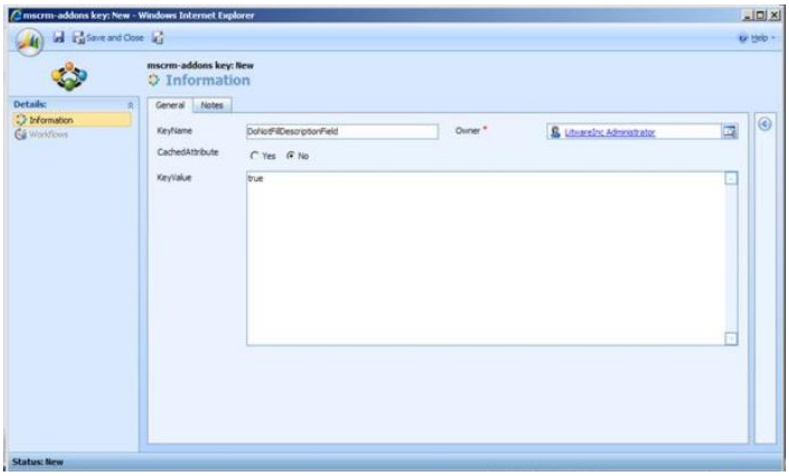
To change the value of the CRM "description"-field open CRM with Internet Explorer and click on "Attributes". Click on the "description" attribute and change the field "Maximum Length". (See next screenshot)



After the changes are saved, click on the "Publish" button within the “Customize Entitiy” window. (See next screenshot)

The second option would be to define a new "Settings-key". (Only possible since DCP Client v4.53). To do this, open your CRM and go to "Settings" and choose "MSCRM-ADDONS.com". Then go to “Products:” and select "DocumentCorePack". With left click on “MSCRM-ADDONS.com” you get to the “Settings-key”.

Now create a new "Settings-key" with the name "DoNotFillDescriptionField" and give it a value "true" (field blank) or an integer (number of characters is either the same or smaller than the actual length attribute). E.g.: if you type in a value of “400” then 400 characters will be shown and the rest is cut.



4.6 Save as DOCX: Saving documents back to CRM without creating an activity

This new feature offers you the option to save a document directly to the proper location in CRM without the need of generating an activity. Up until now, the only option you had was "Create CRM Activity" which always generated an email-, fax- or letter-activity. The location depends on the configuration. This is defined within the DocumentsCorePack server configuration tool.

Once the latest DocumentsCorePack client version is installed (version upgraded), this new feature will be available as an additional button in the ribbon of our add-on in Microsoft Word.

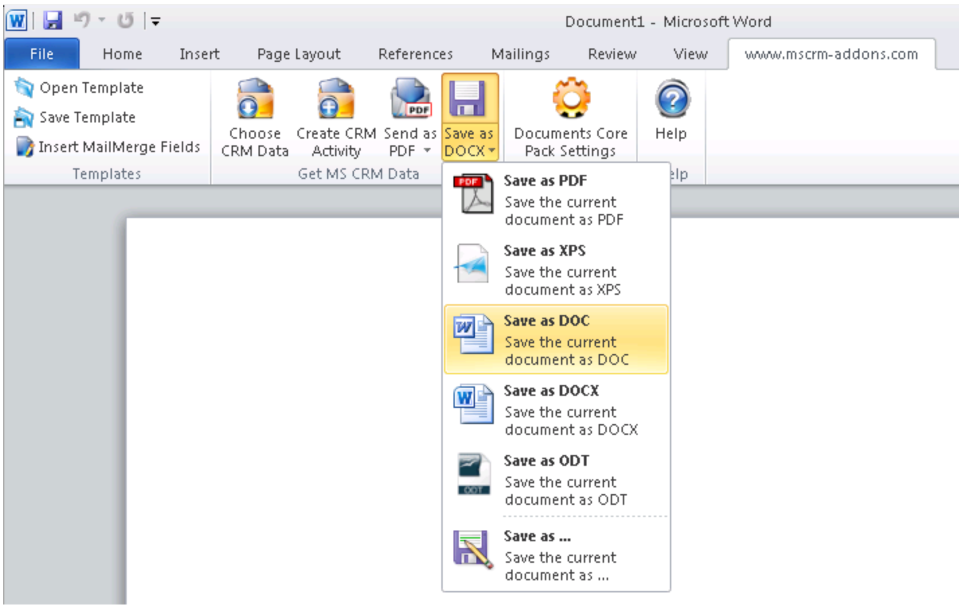
To take adavantage of this new feature you need at least the following version:

- DocumentsCorePack Client for MS CRM 2011 5.91

Specification
The save document feature is an additional button in the ribbon of the DocumentsCorePack add-on.

The button enables you to save a merged document to a specific location without the need of generating an activity.

The document can be saved in various formats, directly from the drop down menu. The button itself saves the document as a Microsoft Office Word Open XML document (docx). Document types that are support by Word but not listed in the menu can be selected with the "Save as..." option.



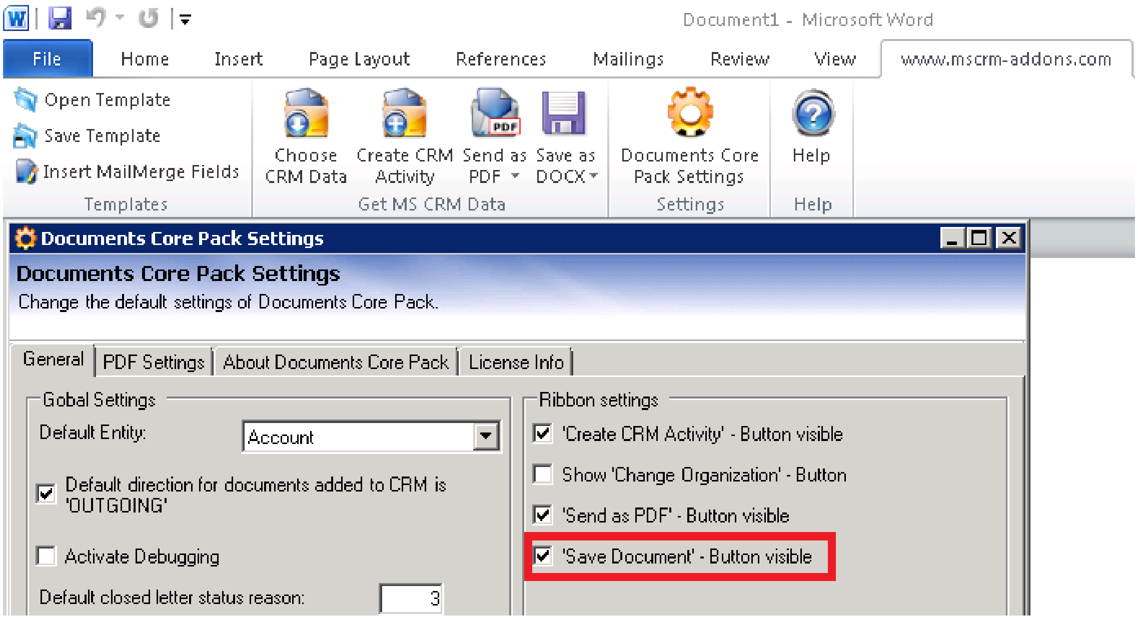
DocumentsCorePack template properties like "Document Name", "Create Activities For" and "Save-To Subfolder" affect the location and the name of the document when using this feature.

PLEASE NOTE: Directly after the merge the document might only have a generic name (e.g. "Result1223473.docx") the DocumentName property will then be applied when you use the "Save as DOCX" button.

If no DocumentName poperty is set, the name that is displayed in the header of Word (e.g "Document1", "Result1223473.docx") will be used in the save document location.

Configuration
If you do not want to use this new feature or if you want to enable it again, you can change your DocumentsCorePack Settings.

To gain access to the settings dialog, open Word and navigate to "www.mscrm-addons.com" -> "Documents Core Pack Settings" -> "General".



The needed setting is called "'Save Document' - Button visible" as in the screenshot above.

4.7 How to protect documents using a macro DocX

Protecting the generated document is possible due to DocX and macros.

Open the template and add following macro to the template. Save it with the file extension .Docm.

```
Sub DCPMacro()
    ActiveDocument.Protect Password:="password", NoReset:=True, Type:=wdAllowOnlyR
           UseIRM:=False, EnforceStylelock:=False
End Sub
```

The macro will ensure that the created document is protected with a password.

The DCPMacro will be called after generating the document.

Other macros you could use are:

Macro-Name	when will it will be called from the code
DocumentsCorePackMacroBeforeCreateActivity	this macro will be called before the activity is written to CRM
DocumentsCorePackMacroAfterCreate	this macro will be called after the activity is successfully created

Example:

If you want that the Document Information Panel is visible, you could add following macro which will be executed before the activity is created and saved:

```
Sub DocumentsCorePackMacroBeforeCreateActivity()
    With Application
        .DisplayDocumentInformationPanel = Not .DisplayDocumentInformationPanel
    End With
End Sub
```

5 Performing a mail merge with many records

This chapter will show some of the basic features provided by DCP regarding mailmerge-procedures with multiple records.

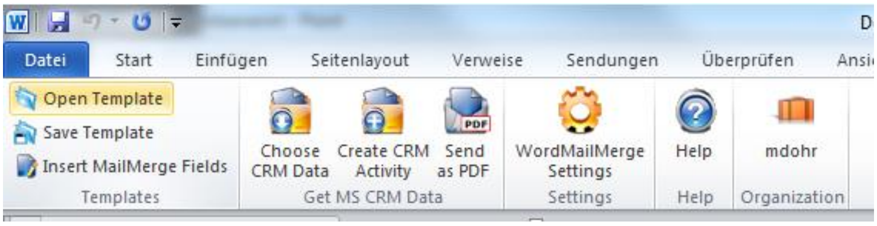
This includes:

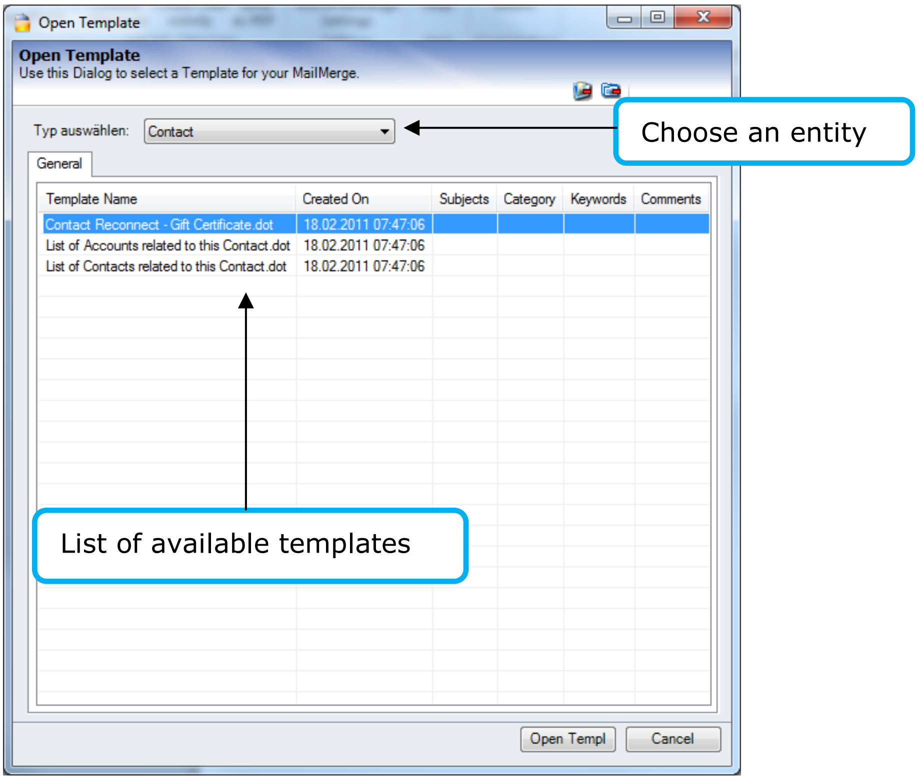
1) Create letters for multiple records (e.g. contacts)
2) Using saved views to choose data
3) Running a mailmerge for marketing lists

5.1 Create letter for many records – Step-by-Step Description

In our example we want to send a certificate-letter to some contacts.

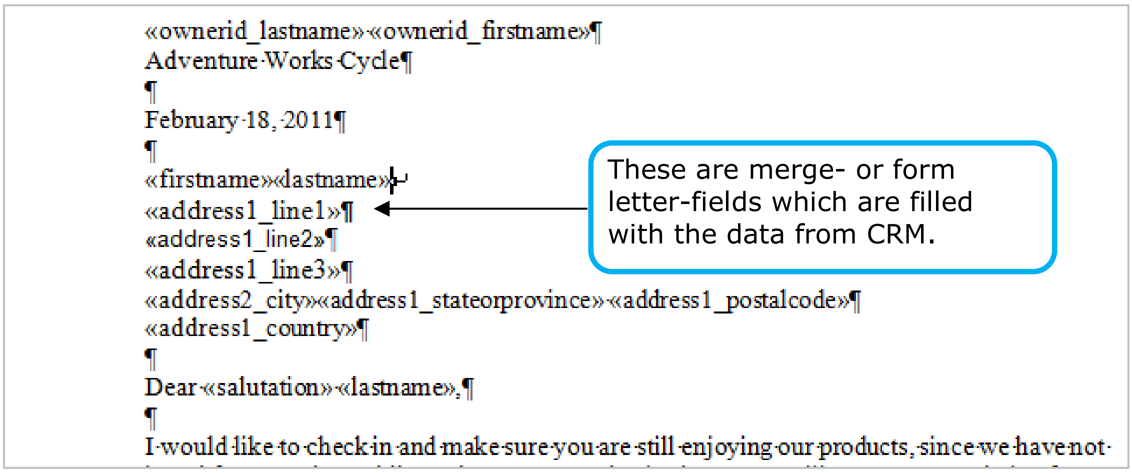
Step 1: Open Word and choose a template
The templates are separated by entities, this means that every template belongs to an entity. Click on "Open Template" in "DocumentsCorePack for MS CRM".



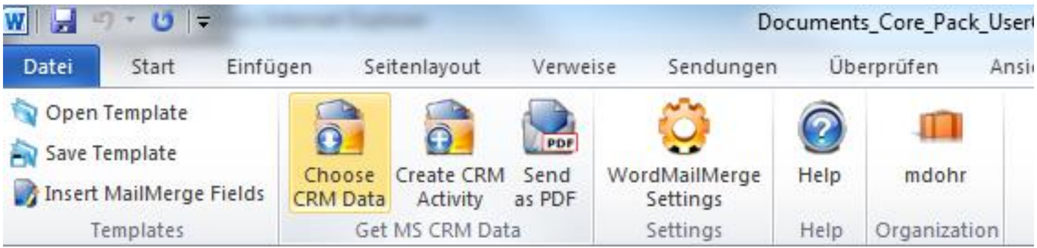


We can proceed with a click on [Open Template].

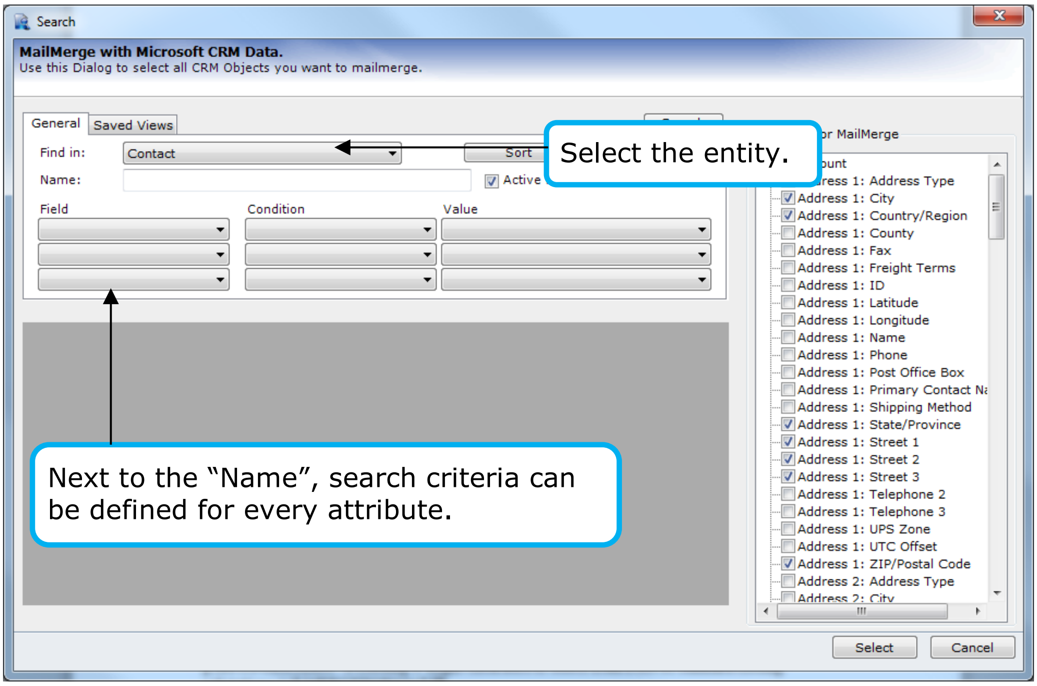
A document based on the selected template will be opened.


«ownerid_lastname»·«ownerid_firstname»¶
Adventure·Works·Cycle¶
¶
February·18,·2011¶
¶
«firstname»«lastname»
«address1_line1»¶
«address1_line2»¶
«address1_line3»¶
«address2_city»«address1_stateorprovince»·«address1_postalcode»¶
«address1_country»¶
¶
Dear·«salutation»·«lastname»,¶
¶
I·would·like·to·check·in·and·make·sure·you·are·still·enjoying·our·products,·since·we·have·not·

Step 2: Choose CRM Data
Now we have to select the contacts we want to create a letter for. Therefore, we proceed with a click on "Choose CRM data"

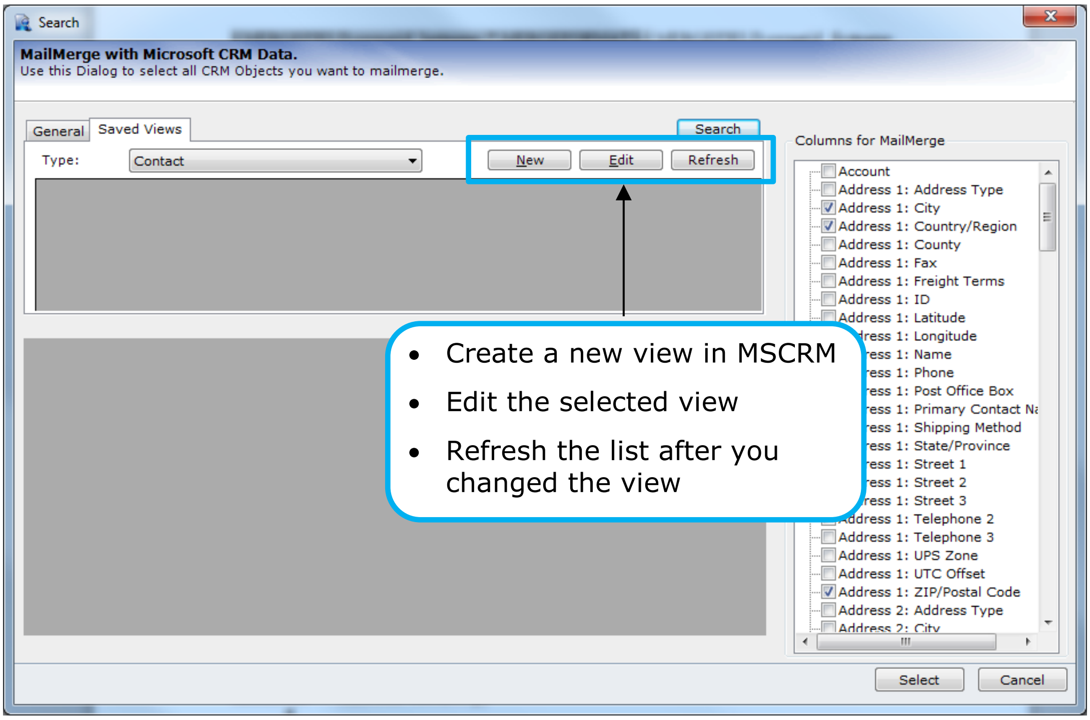


Step 3: Search Window
The search window appears.



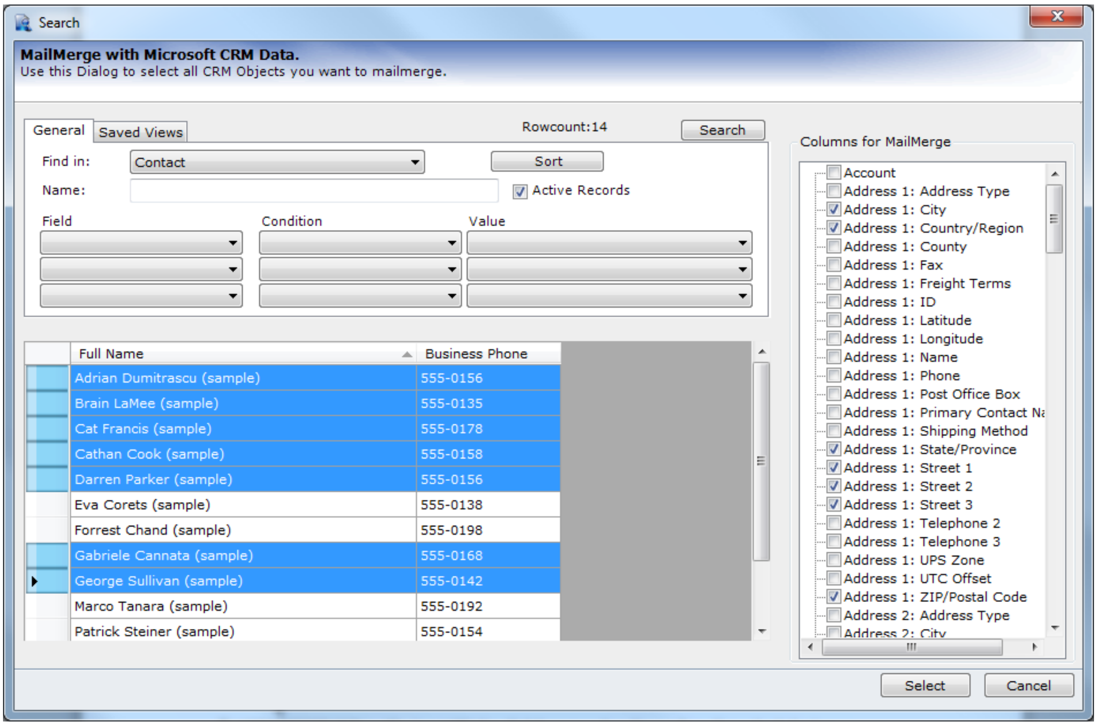
Step 4: Using Saved Views

You can also use saved views that have been defined via an "Advanced Find" in MS CRM (More details in chapter 5.2).



Step 5: Select the records and click on the [Select] button

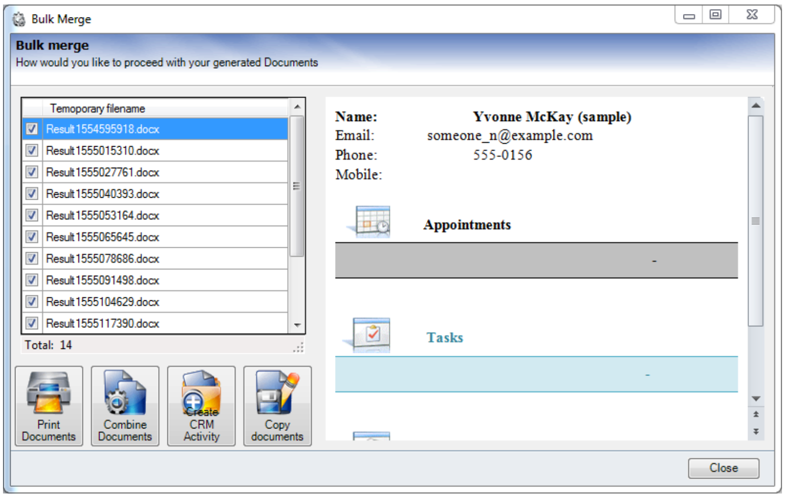
Once we have found the records we want to merge, we can select the entries and proceed with a click on [Select]



The data will be loaded into MS Word. It will not automatically generate documents for each record (as the number of records could be e.g. > 500), but we can generate and write the documents back to CRM via "Create CRM Activity" (see chapter 4.5)

Step 5a: when using "docx"-templates
You will see the following dialog. This dialog shows you a list of the generated documents. (With versions prior 5.44 this dialog does not show up, instead every single document was opened directly in Word)

At this point, the documents only have a temporary name. This name will be replaced with the "DocumentName" property if this is set in the properties. You can click on the single entries and check the preview on the right side of the dialog. Open and edit the generated documents by double clicking on the item.



Within this dialog you also have additional features:

- **Print Documents:**
  Sends all the generated documents to your default printer; The printer itself or the settings can be changed within Windows printer settings.

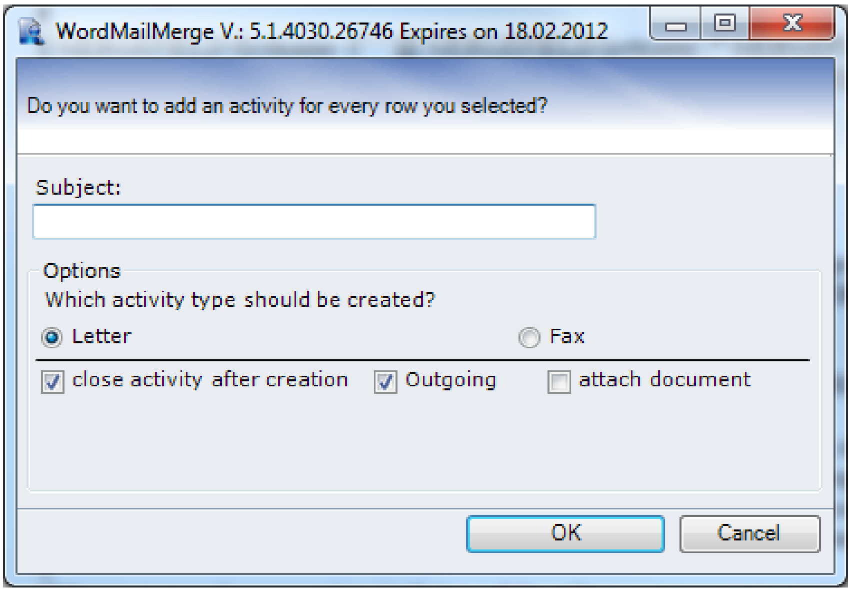
- **Combine Documents:**
  When this option is used, all generated documents will be combined into one big Word-document. This document will be opened after the process has finished.

- **Create CRM Activity:**
  See: ***Step 6*** below

- **Copy documents:**
  You can copy the temporarily generated documents to a location of your choice. During this step, the "DocumentName" property will be applied. In case of name conflicts, the name will be extended with a continuing number.

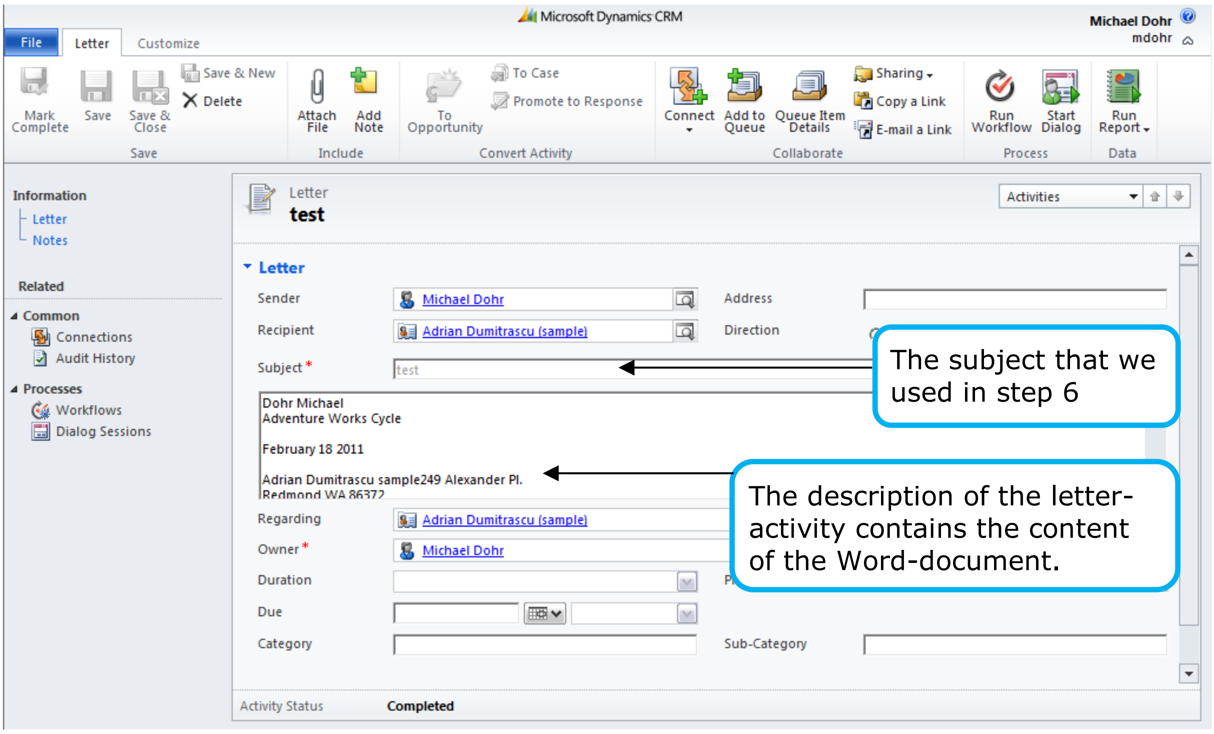
Step 6: Click on the [Create CRM Activity]

We can choose the activity type, the subject and we can specify some further settings and proceed with a click on [ok].



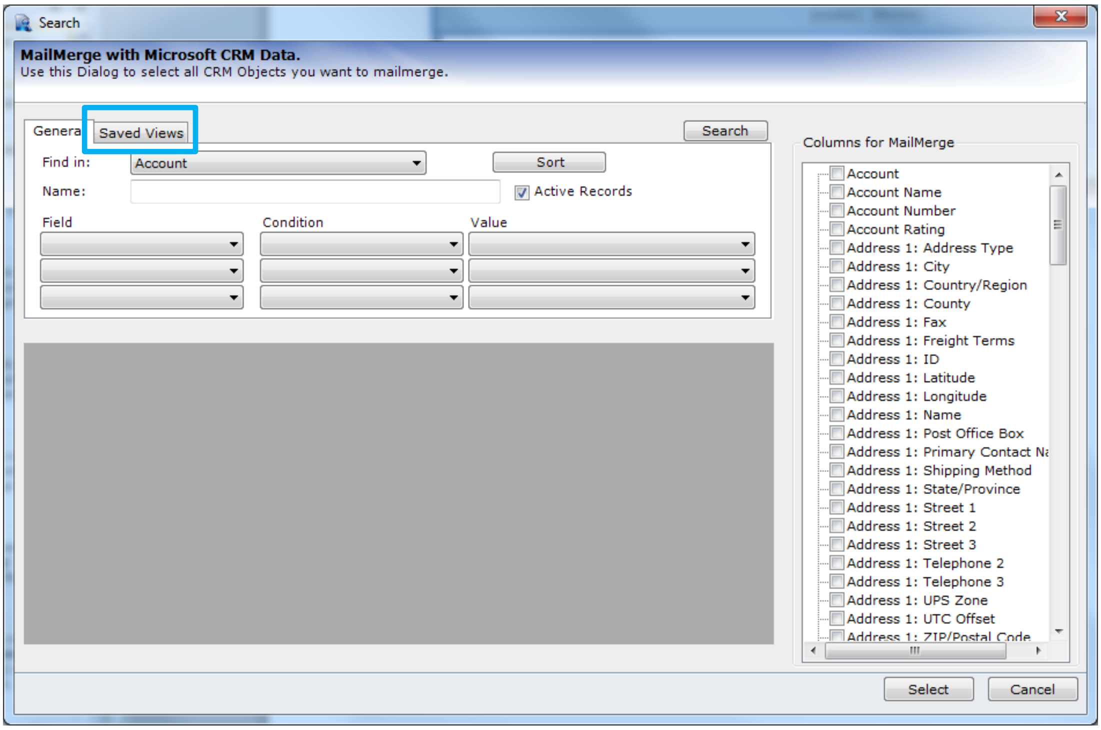
Step 7: Result

Within CRM we can see that a new activity has been created for each of the chosen contacts.

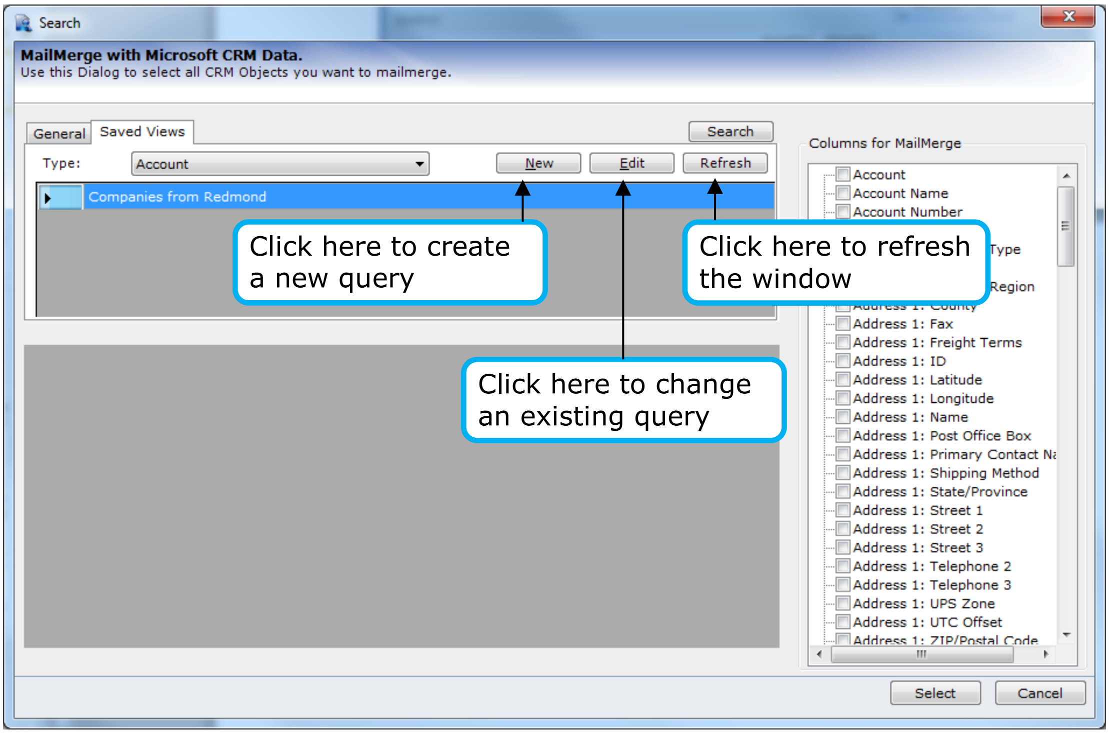


5.2 Using „Saved Views" to choose data

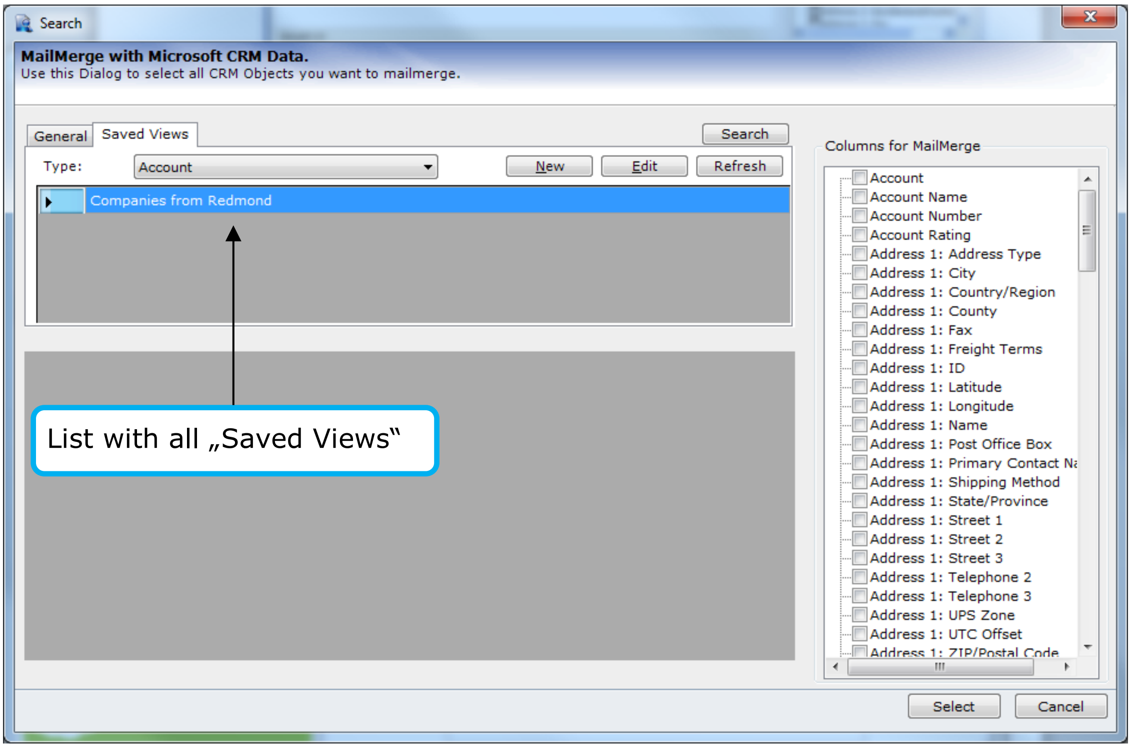
Step 1: Click on [Choose CRM Data]
By clicking on [Choose CRM Data] in MS Word, the search window will be opened.



To choose the records by using saved views, we have to change to the register [saved views]. The following window appears:



Step 2: Choosing the view
We can proceed and open the records retrieved by this view with a double click on the view.



The results will appear. We can choose the records we want to use and go ahead by clicking on the [Choose] button. DCP will now load the data to Word and we can e.g. "Create CRM Activities" as described in chapter 4.4 and 5.1.

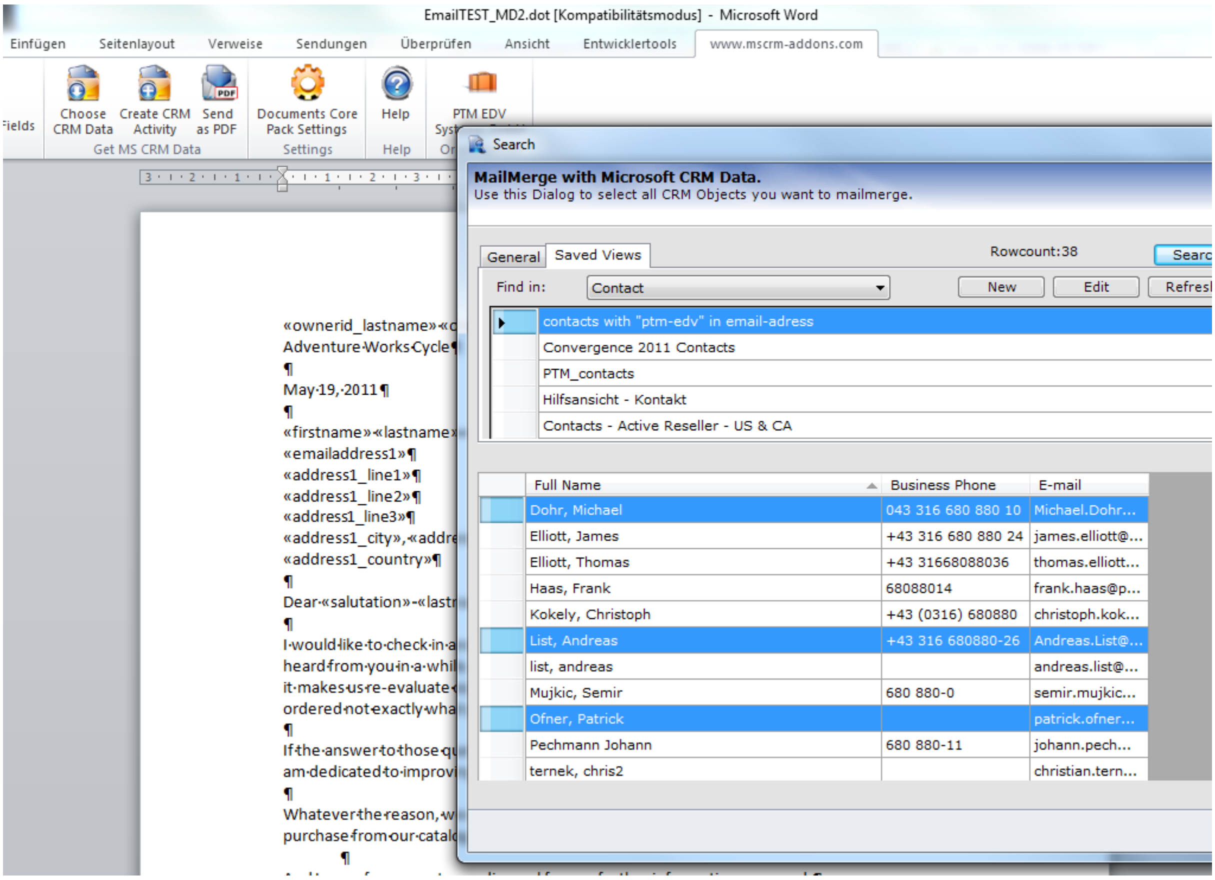
6 Sending Mails via Outlook

This chapter explains how DCP can be used to send emails containing the generated document.
To use this option you need Outlook installed on your client machine, and also the CRM Outlook Client. The entity that contains the email address of the recipient must be synchronized with Outlook to resolve the recipient during the sending process.

6.1 Open template and load records

First, we have to choose a template we want to use and load the CRM-records (contacts, accounts,…) that should receive the email. Therefore, we have to "Performing a mail merge with many records" as described in chapter 5.

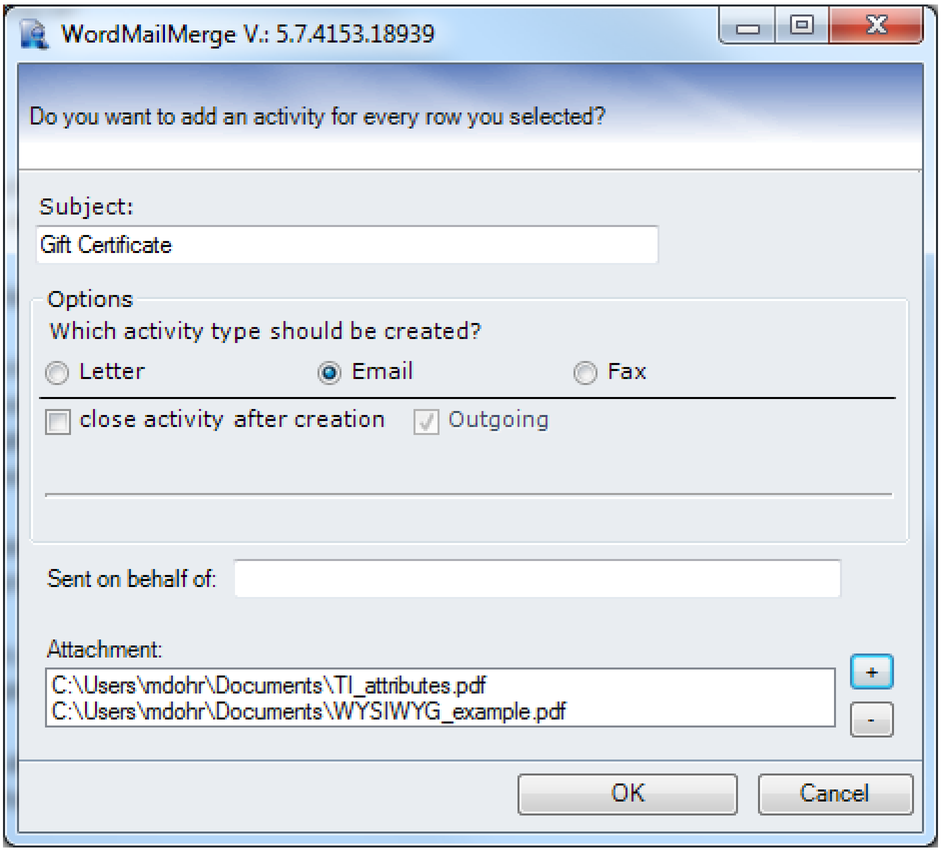
In our example we use the "Gift certificate"-template that comes with the installation and select 4 contacts.



Result: The records will be loaded into the template. We can now proceed with a click on "Create CRM activity".

6.2 Create e-mail activity

A click on „Create CRM- Activity" brings up the following dialog.
Selecting "Email" allows you to define some email-specific properties:



Subject: subject of the created email

Sent on behalf of: define the sender (from-email adress); If empty, the default sender used by Outlook will be set.

Attachment: allows to add some attachments like Terms & Conditions or any other document

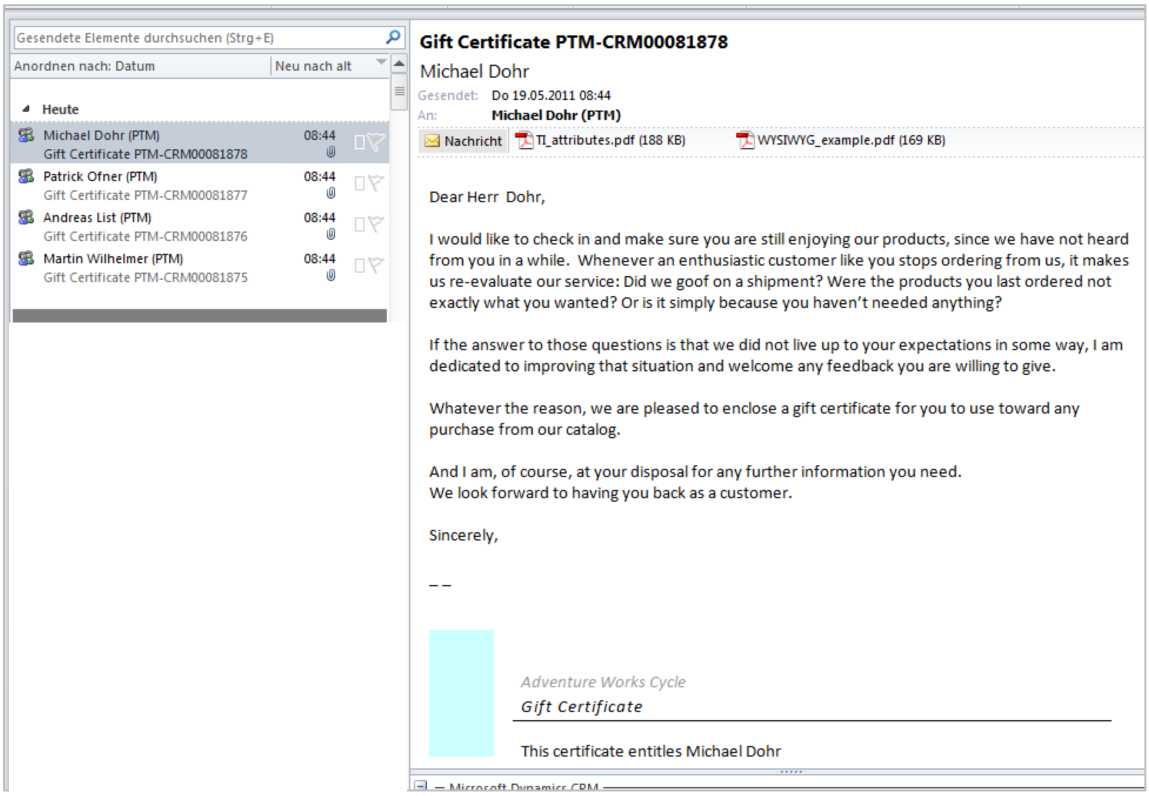
In our example we are sending the "Gift Certificate" mail including 2 files to 4 contacts.

Everything is defined, so we can proceed with a click on [OK]

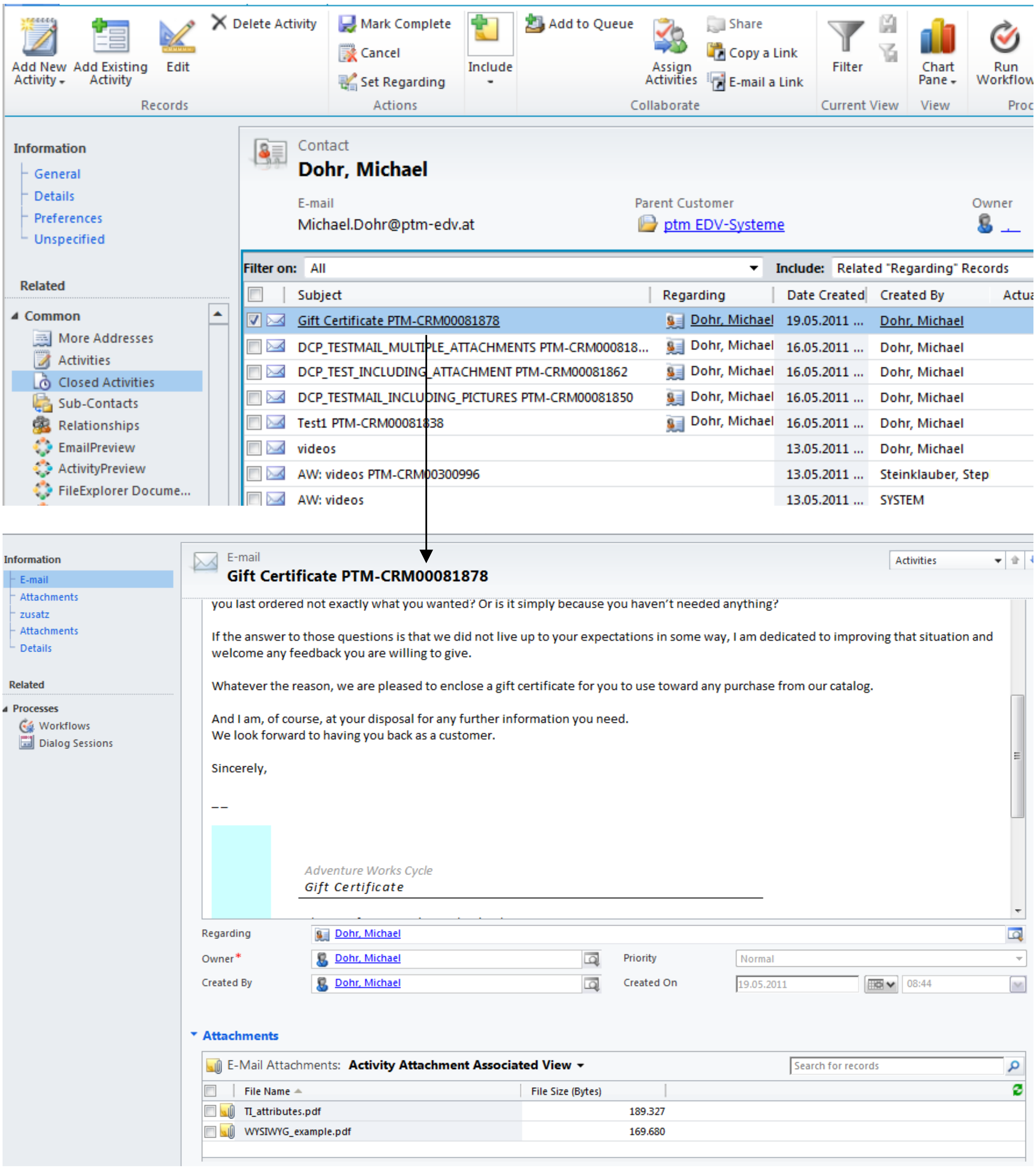
6.3 The Result

After hitting the [OK] button, Outlook will start sending the emails. Depending on the size of the document and number of attachments, this could take up to 3 seconds per mail.

Once the procedure is completed, we can see that the emails are appearing under "Sent Items" within Outlook:



The CRM-Outlook-client will synchronize the emails with CRM, so a CRM-email-activity will be created for each contact automatically and therefore appears in the activity/history of those contacts:

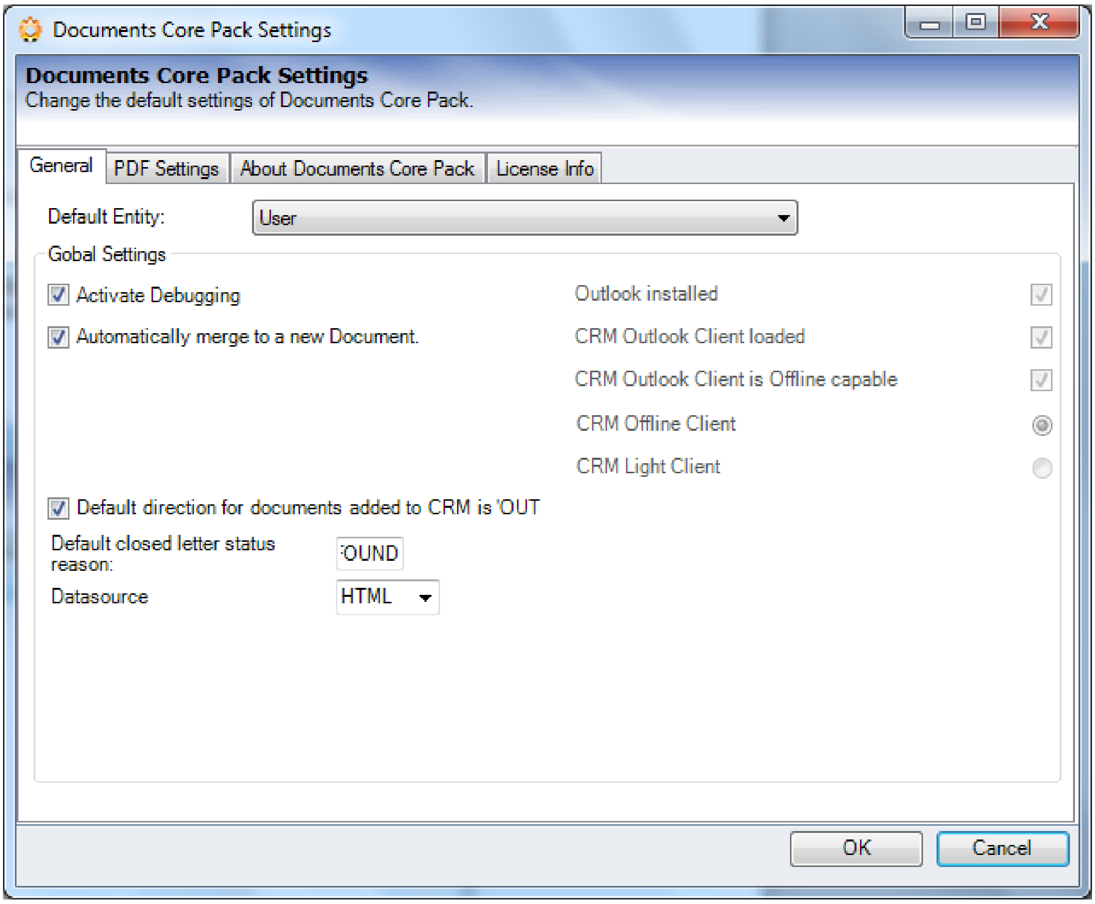


As you can see in the screenshot, the content of the email appears in the "description" field of the activity and both files are attached.

7 DocumentsCorePack Settings (WordMailMerge settings)

This chapter explains the settings of the DocumentsCorePack-Client (*MS Word->www.mscrm-addons –Ribbon->WordMailMerge Settings*). In most cases the default settings are fitting the users-requirements.

7.1 General -tab

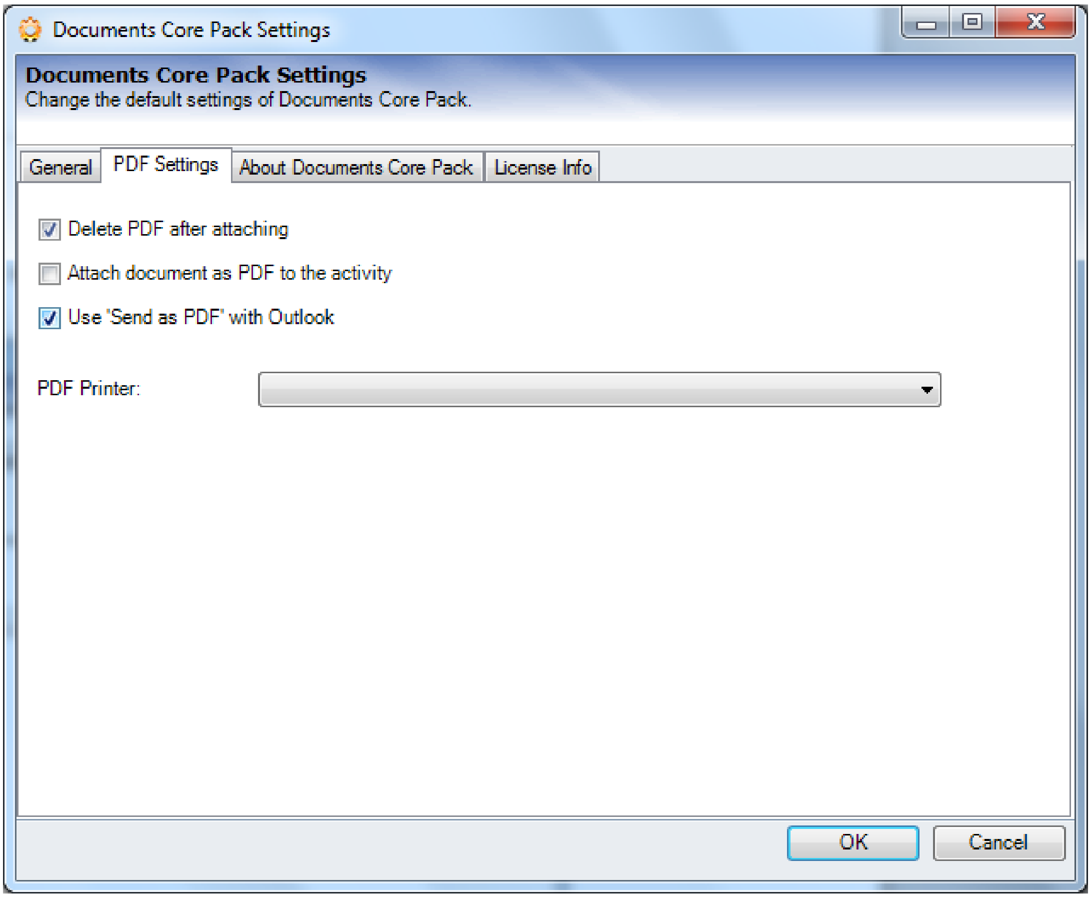


Settings:

- Activate debugging: required for support-issues only; The log-files contain detailed descriptions about what was happening in case of errors. As logging always comes with a decrease in performance, you should leave this setting deactivated unless a mscrm-addons- support team member asks you to activate it.
- Default direction for documents added to CRM is ‚Outgoing‘: defines the default direction for created activities (letter, fax).
- Automatically merge to new Document: When checked, a new document will automatically be generated once the data is loaded. (e.g. after hitting the Print in Word button on a quote).
- Datasource: Choose the datasource that should be used for storing temp-data.

7.2 PDF-settings

Contains some basic settings regarding the "send as PDF" – functionality (see chapter 4.2).



Settings:

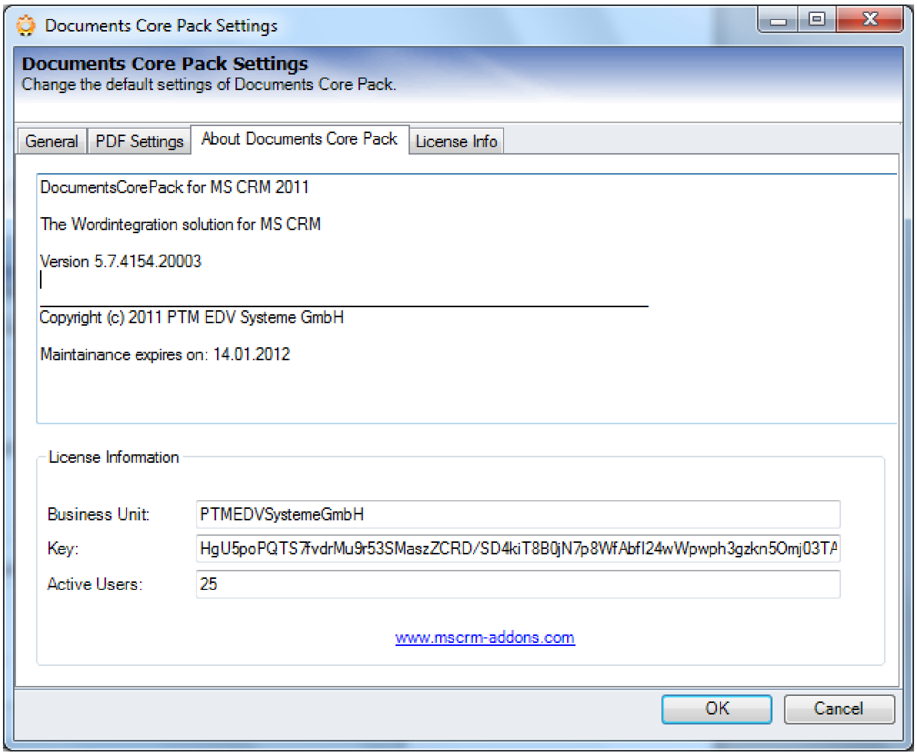
- PDF-Printer**:** defines the PDF-printer that should be used Supported printers:
  - Office 07 / 2010 – PDF-printer (**default**)
  - PDF Creator

- Delete PDF after attaching: Defines whether the temporarily locally saved PDF file should be deleted after attaching the PDF to the email activity.

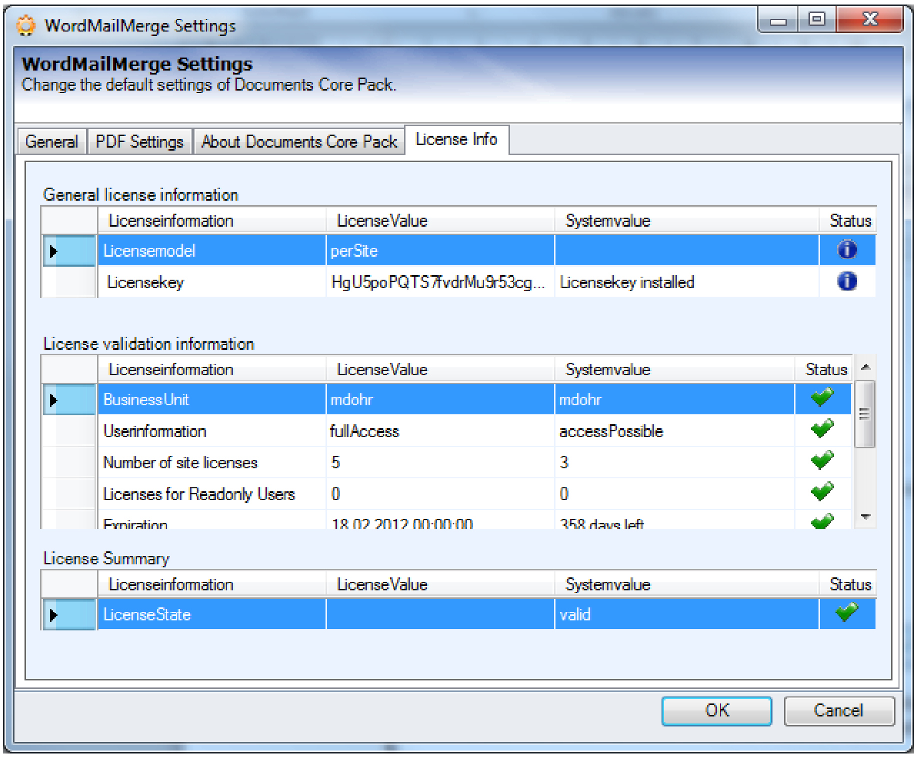
- Attach document as PDF to the activity: By default, the document will be saved as a *.doc – file when using "Create CRM activity" (see chapter 3.3). This setting enables to save PDF files instead.

- Use "Send as PDF" with Outlook: If checked, the document generated by the "Send as PDF" –routine (see chapter 4.2) will be attached to an email in Outlook instead of an email-activity.

7.3 About DocumentsCorePack / License Info



- About DocumentsCorePack contains detailed information about the installed version and some facts about the currently used license.



- License Info: shows details about the license (validity, type, users)

8 Configure save-locations (SharePoint/FileShare paths)

This chapter contains a detailed description about how to predefine SaveLocations for generated documents with the "Document Properties" (see chapter 3.3, subitem 5.1).

E.g. It is possible to define that a quote template should be automatically saved into the "Parent-customer"-share with the Quote-number as the filename.

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

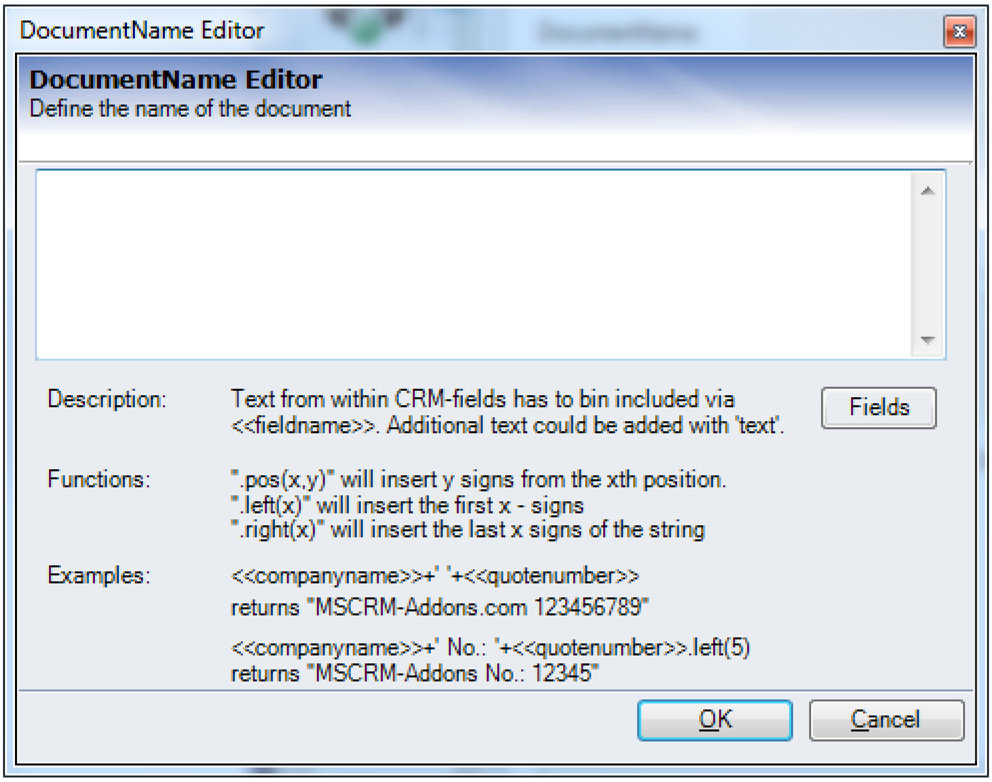
1) DocumentsCorePack Server Configuration (Server)

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

2) Document Properties (Client)

In the document properties of the template (see chapter 3.3, subitem 5.1) you can find a setting called "**SubFolder Name**" which allows you to specify a subfolder for the created document.

With a click on [Edit], you'll see the following window:



Please see (*DocumentName in on page 21) for a detailed description about this editor.

Examples:

1. **We will create a gift certificate for a contact and save it to a new folder for the contact :**

- Server-Settings

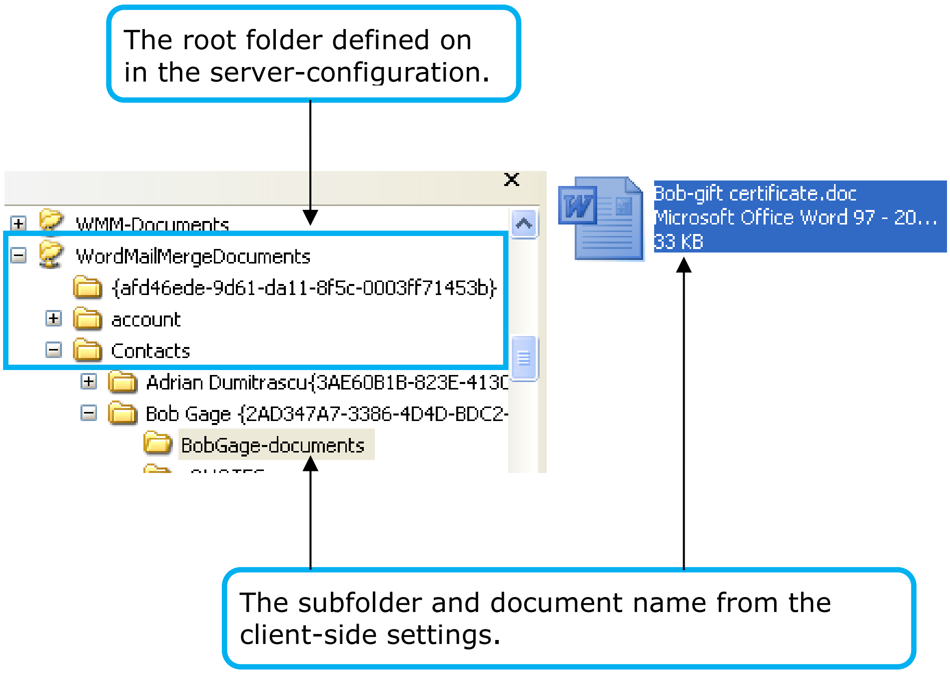
  The gift certificate is a template for the contact entity, so the Fileshare/SharePoint –root will be taken from the depending server setting:

- Client-Settings:

  In the document-properties, we can define a subfolder-name and a document name for the created gift-certificate.

- Result:

  The settings described above result in following document path on the fileshare:



2. **We will generate a quote and save it to the PrimaryContact on the Fileshare.**

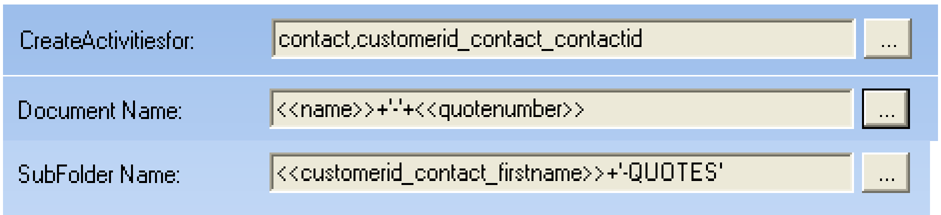
- Server Settings:

  As the document will be created for the entity "Contact", the root folder will be taken from the contact-settings rather than the quote-setting in the DocumentsCorePack server configuration.

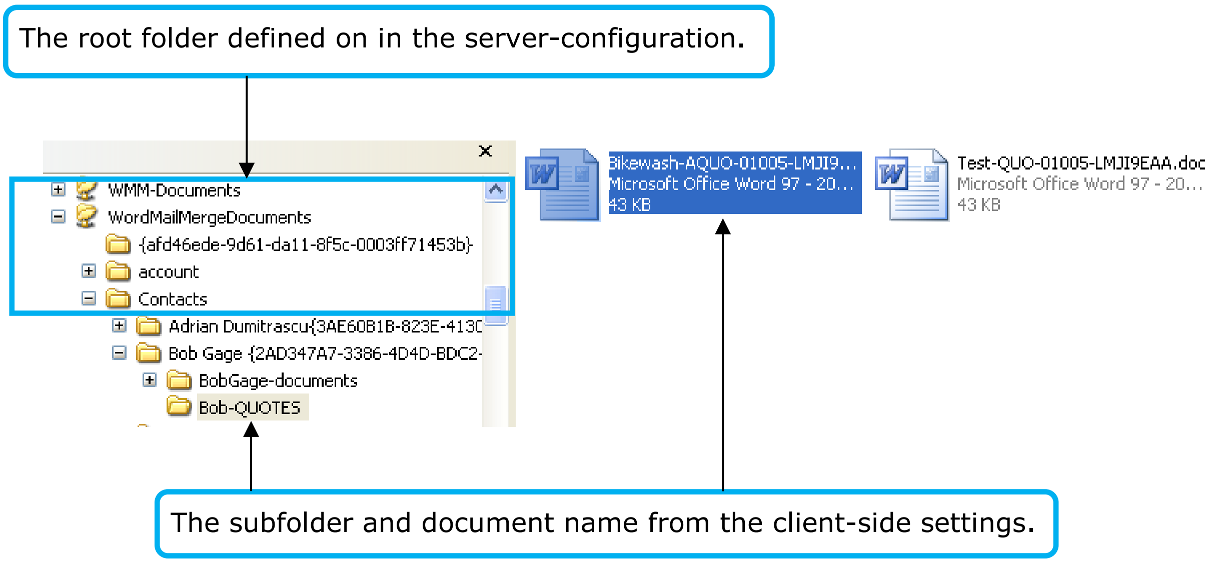
- Document Properties:

  In this case we have to use the "Create Activities for" –option as the quote should not be saved to the quote-folder.

  Therefore, the client side settings have to look like this:



- Result:



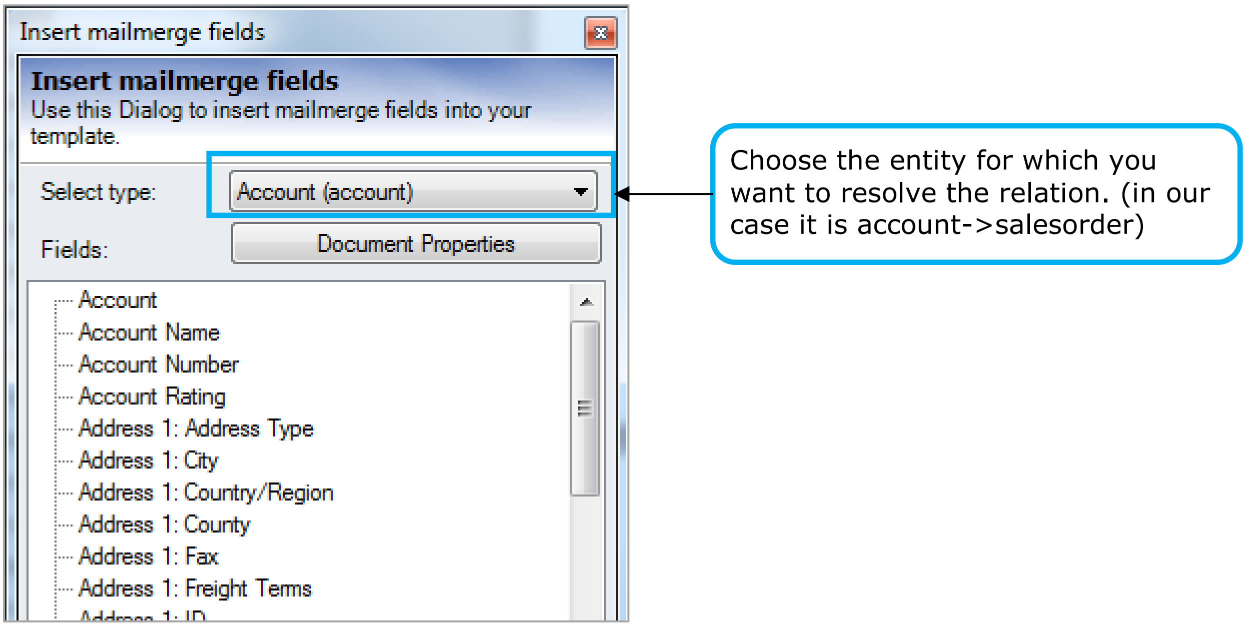
NOTICE: These operations are equal on SharePoint! (see implementation guide chapter 9.4)

9 Resolve an additional Relationship – Step-by-Step

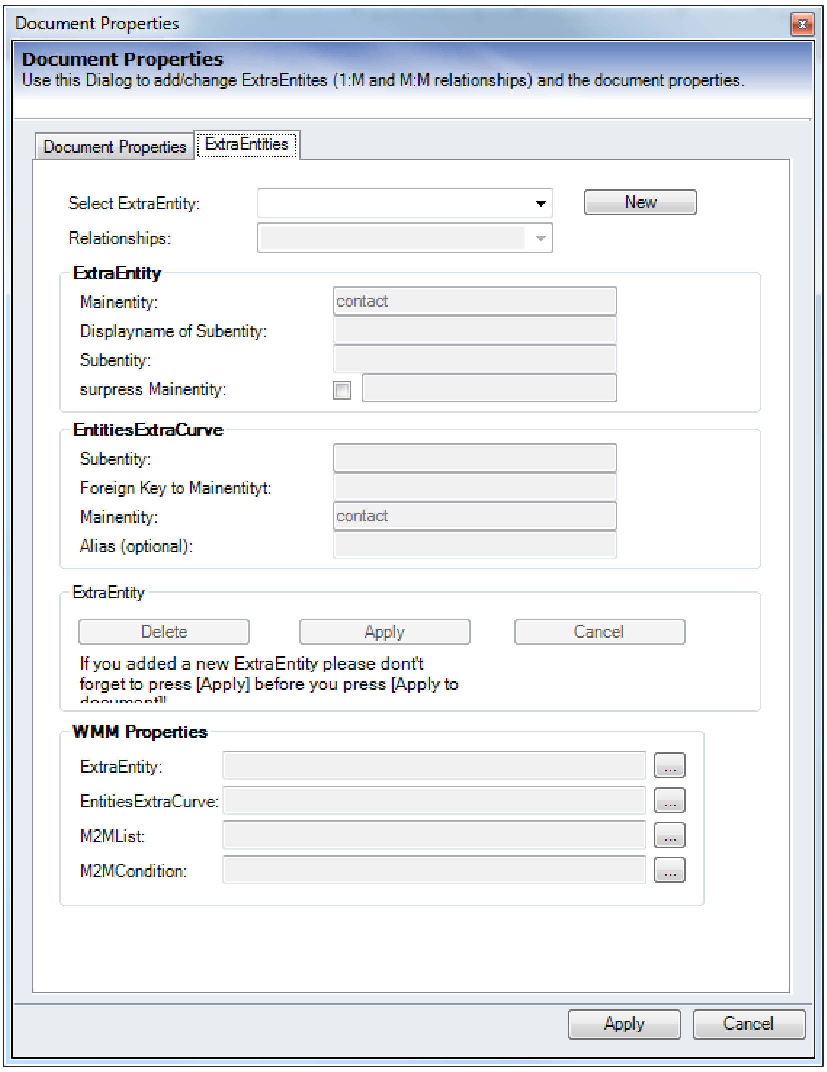
With the option to define "One to Many" and "Many to Many" relationships it is possible to link entities together and load data from both into the MS Word-document.

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

Step 1: First, you have to click on "DocumentsCorePack for MS CRM"->"InsertMailMerge fields" and choose the entity you want to define a relationship for.



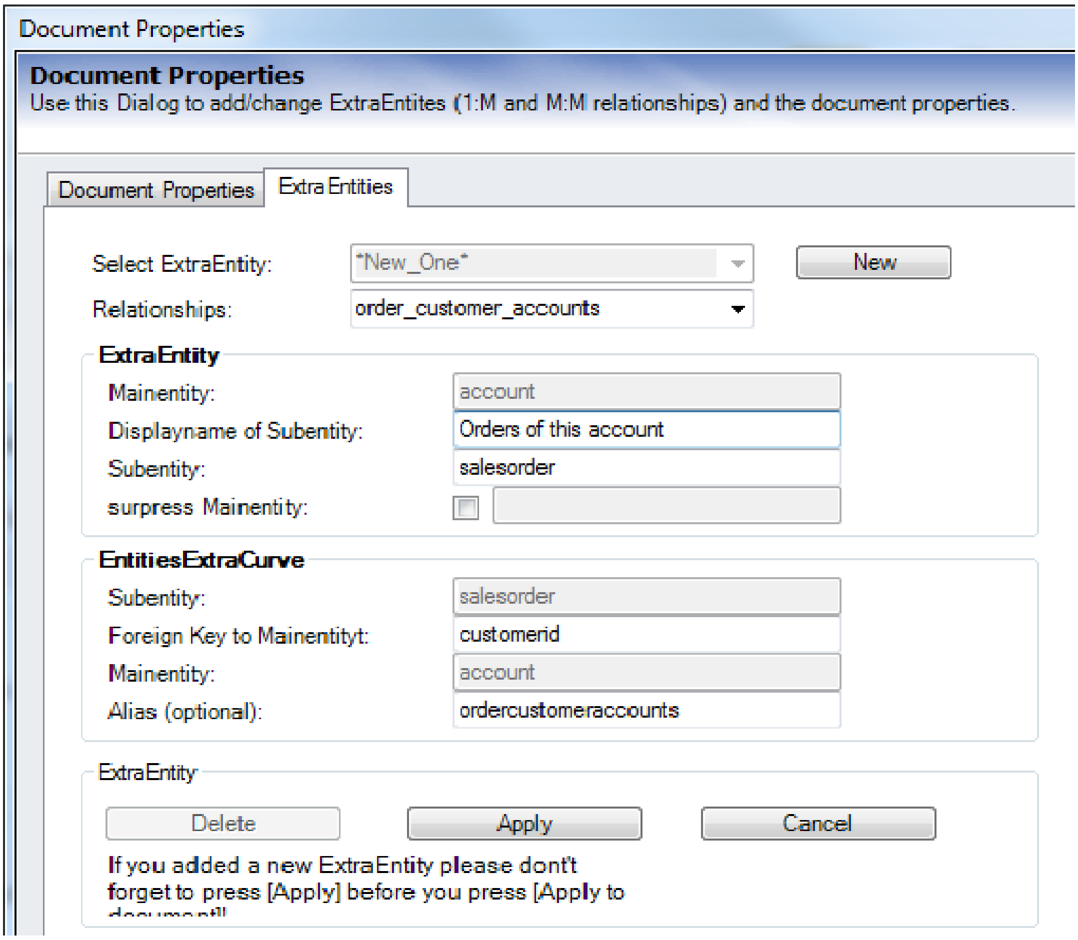
Step 2: After that, we proceed with a click on „Document Properties" and switch to the „Extra Entity tab" (see page 23).



To add a new relation, we need to choose the entity/relation we want to add. Therefore, we proceed with a click on "New".

You are now in the "edit-mode". This means that the tree button [Delete], [Apply] and [Cancel], as well as some of the form fields are active and we can start defining the account->order relationship.

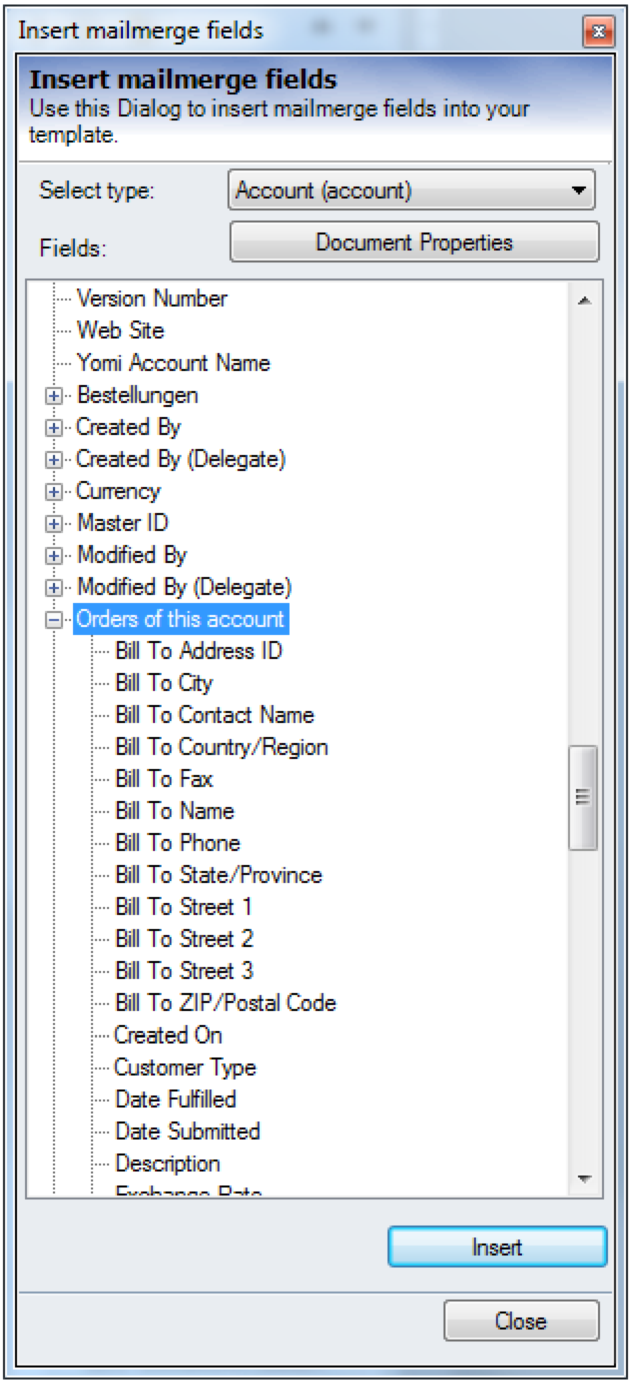
Step 3: Choose relation
The combobox allows choosing any relation defined within MS CRM.



Most of the fields are filled automatically. All we have to do is to add a DisplayName for the new relation. In our example this is "Orders of this account".

Step 4: After filling all fields we can proceed with a click on “Apply” and finally „Apply“ all relations and properties to the Word-document.

Now we can see a new entity “Orders of this account” in the list of the available fields for entity account and therefore use it to load data of the orders into the template.



10 CRM-internal features

DocumentsCorePack provides some useful additional features that improve the user-experience within MS CRM 2011

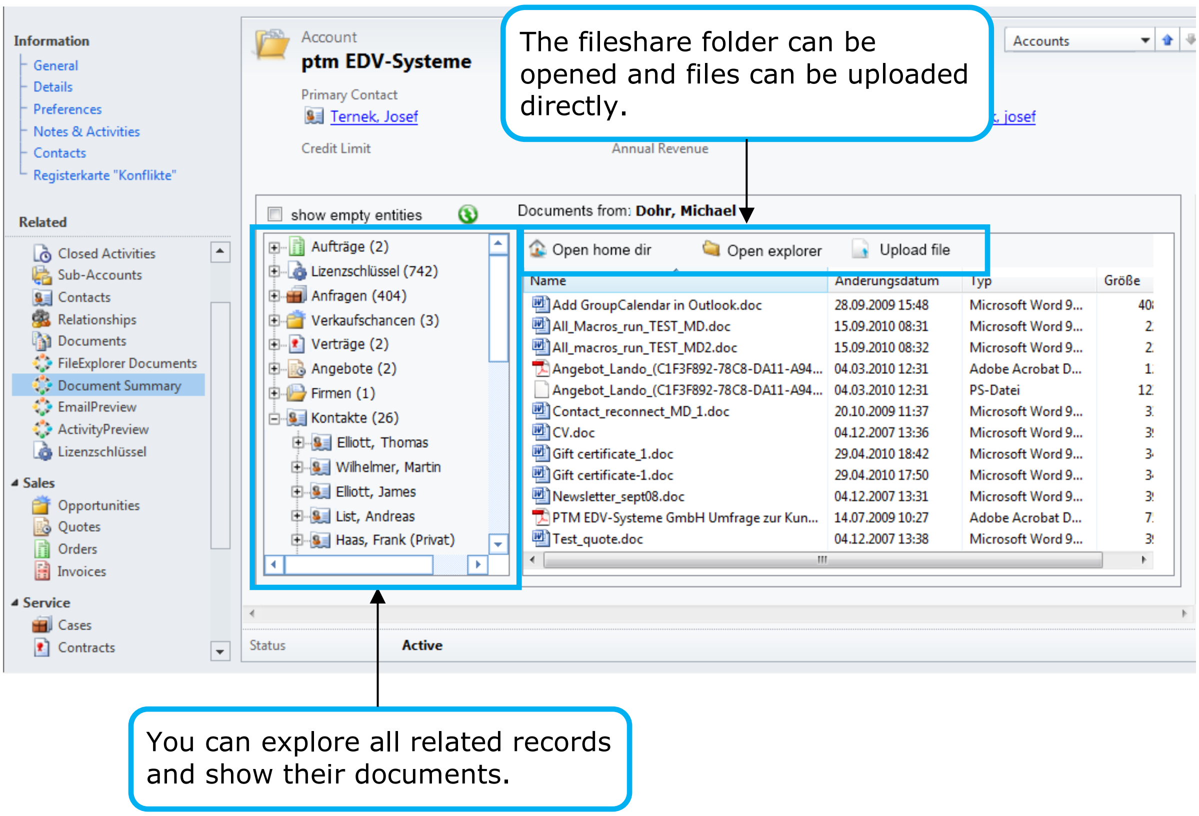
Those features are:

1) Document Summary
2) LineItemCount

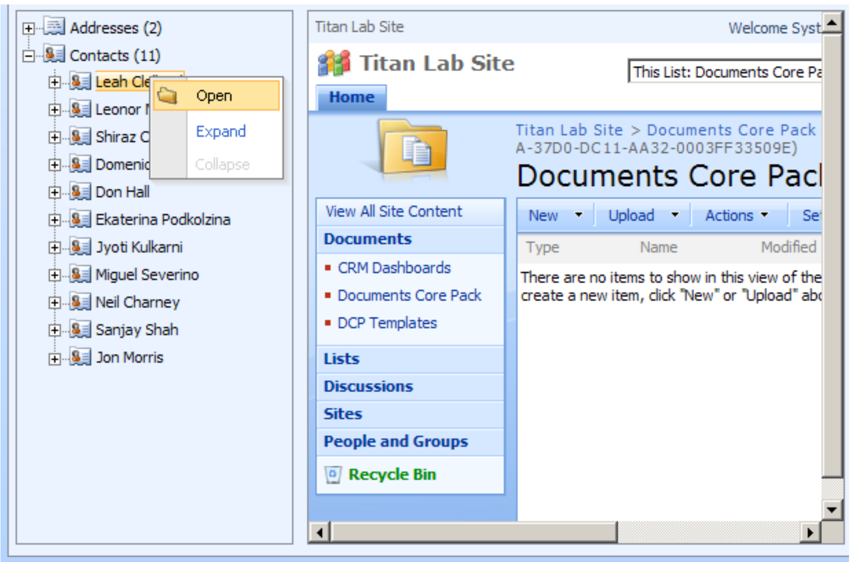
Documentation on how to activate and configure the following point can be found in our implementation guide for DocumentsCorePack 2011 (server).

10.1 Document Summary

Enables you to show up documents saved to related records within CRM.
With the document-summary activated (configuration see implementation guide chapter 9.5) you'll see a new navigation item in the side menu.



You can click on an e.g. contact to see the documents to this record. The right click menu on each node provides the opportunity to open up the entity or expand/collapse the tree.



The tree is recursive. This means that you can expand the tree downwards unless you reach the point where no further entities are related. e.g. open an account, expand the contacts, expand the invoices of a contact, etc.

Additionally, all the documents can easily be opened via double-click from within the Document Summary

11 Contact

If you have questions to the product send an Email to
support@mscrm-addons.com
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http://blogs.mscrm-addons.com

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