

AutoMerge for MS CRM 2011

Version 5.0

Users Guide (Use of AutoMerge for MS CRM 2011)



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1 Intro

AutoMerge provides the possibility to create and print documents automatically triggered from a workflow or dialog. After the document is created, it can be attached to emails and letters as well.

Main Features:

CreateDocument

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, AutoMerge provides the opportunity to automatically create e.g. quotes, invoices, etc. including data from related records like "other contacts", accounts, products, etc.

• Attach to Email/Letter

With this functionality the generated document can be attached to emails and letters.

- **PrintOut** AutoMerge also provides the possibility to print out the created document.
- **DeleteDocument** Delete an existing document from the "MSCRM-ADDONS.com User/Temp Settings" entity.

• SendEmail

Gives you the ability to send an existing email.

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



2 Use of the AutoMerge functionality

For using the AutoMerge functionality, there is no client software necessary. It can be accessed directly within CRM from workflows and dialogs.

The following descriptions show where the AutoMerge functionality can be found and which requests are available.

There are two possibilities to set up AutoMerge (On-Premise or CRM Online). While AutoMerge On-Premise works as a Plugin in CRM, AutoMerge for CRM Online needs a service (see AutoMerge InstallationGuide for MS CRM 2011). To create workflows for On-Premise read chapter 2.1 and for CRM online chapter 2.2 of this user guide.

2.1 Workflow (on Premise)

This section shows how the AutoMerge functionality can be used when starting from a workflow (this works only for On-Premise version). Open Settings -> Processes within CRM.

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🚖 🏄 EchtServer	CRM 🏄 crm2	2011-r3 🏄 TestServer CRM4	🏄 SHS-Unternehmensberatu 🧯	Ceiterfassung
File Home		🕌 Microsoft I	Dynamics CRM	Patrick Ofner 🕐 pofner 🔺
New New Activity - Record - New	Import Adva Data Fir Tools	nced		
Settings 4 Business Business Ma Templates Product Cata 4 System Administrati	alog	Overview Video	Get Started with Processes 1. Explore P About Running Workflows P Microsoft Dynamics Marketplace	1 2 3
 Administration Data Management System Jobs Document Management Auditing 		Processes: Search Res . New 3 🛛 &		More Actions - Category
Customization Customizatio Customizatio Solutions Dynamics Ma Process Center C. Processes				<u></u>
Extensions MSCRM-ADE	DONS.com P			
G Workplace				
i Service		4		•
E Settings		0 - 0 of 0 (0 selected)		H ◀ Page 1 ►
http://crm2011r6-	de:5555/pofner	/main.aspx# } C D E F	G H I J K L M N O P Q	RSTUVWXYZ



Hit [New] to create a process.

Process: New Webseitendia	log	Design & Municipal		x	
Create Process Create a new process definiti you can create, dialogs and v		xisting template. There a	are two categories of processes	s	
Process name: * CreateAndAttachInvitation					
Entity: *	Contact 🔹	Category: *	Workflow	•	
Туре:					
New blank process					
New process from an existing	g template (select from list):				
Template Name 🔺		Primary Entity	Owne	1	
		No process templa	ate records are available in t		
0 - 0 of 0 (0 selected)			H ◀ Page 1 ►	-	
Properties			OK Cancel]	
http://crm2011r6-c 🕥 Lokales Int	ranet Geschützter Modus: In	aktiv			

Type in a name for the new process, define the starting entity and select "Workflow" in the drop down box. For starting with a new workflow, select "New blank process". Hit [OK] to proceed.

Then, the standard workflow configuration window will appear.



Process: CreateAndAttachInvitat	tion - Windows Internet Exp	olorer		
File 🛃 🔂 Save and Close	📑 📔 🗍 🔘 Activate	Show Dependencies	<u>∲ A</u> ctions +	@ <u>H</u> elp →
Process: CreateAndAttack	Invitation		,	Working on solution: Default Solution
4 Common	General Administratio	on Notes		
 Common Information ☑ Audit History 	▼ Hide Process Properti	es		
4 Processes	Process Name *	CreateAndAttachInvitation	Entity	Contact
🚱 Workflows	Activate As	Process	Category	Workflow
	Available to Run		Options for Automatic Processes	
			Scope	User
	As a child proce	ss	Start when:	Record is created
				Record status changes
				Record fields change
				Select
				Record is deleted
	Add Step 👻 📑 🖬	nsert 👻 🗙 Delete this step		
	Select this row an	d click Add Step.		
Status: Draft				
				€ 100% ▼

Use it to create your own workflow. If you would like to use the AutoMerge functionality, go to "Add Step" -> "AutoMergeWF".



Process: CreateAndAttachInvitation	on - Windows Internet Exp	lorer	-	
File 🛃 🛃 Save and Close	🛃 🕕 🖸 Activate	탁음 Show Dependenci	es 👍 <u>A</u> ctions +	
Process: CreateAndAttach	Invitation		Workir	ng on solution: Default Solution
▲ Common	General Administratio	n Notes		
 Z Information ☑ Audit History 	▼ Hide Process Propertie	25		
▲ Processes	Process Name *	CreateAndAttachInvitat	Entity	Contact
🐝 Workflows	Activate As	Process	Category	Workflow
	Available to Run		Options for Aut	tomatic Processes
	🗌 As an on-deman	d process	Scope	User
	As a child proces	s	Start when:	Record is created
				Record status changes
				Record is assigned
				Select
				Record is deleted
	📑 Add Step 👻 📑 🖬 Ir	nsert 👻 🗙 Delete this s	tep.	
	Stage	p.		
	Check Condition			
	Conditional Brand	th		
	Default Action Wait Condition			
	Parallel Wait Bran	ch		
	Create Record			
	Update Record			
	Assign Record			
	Send E-mail			
	Start Child Workf	ow		
	Change Status			
	Stop Workflow			
	AutoMergeWF		achToEmail	
			achToLetter ateDocument	
			leteTempDocume	ent
			ndEmail	
Status: Draft				
				🔍 100% 🔻

Here you can see all five available AutoMerge steps. The handling of these is like the handling of standard workflow steps:

- CreateDocument
- AttachToEmail
- AttachToLetter
- DeleteTempDocument
- SendEmail



2.1.1 CreateDocument

Select this option to create a new document based on a template.

Process: CreateAndAttachInvitation - Windows Internet Explorer					
File 🛃 🛃 Save and Close 🎒 🕖 💿 Activate 🖏 Show Dependencies 救 Actions - 🕜 Help -					
Process: CreateAndA	ttachInvitation			Working on solution: Default Solution	
Common Subscript Audit History	General Administrati				
Processes Workflows	Process Name *	CreateAndAttachInvitation		Contact	
C WORKHOWS	Activate As Available to Run	Process	Category Options for A	Workflow Automatic Processes	
	As an on-dema	nd process	Scope Start when:	User	
	As a child proce	255	Start when:	Record status changes	
				Record is assigned Record fields change	
				Select	
				Record is deleted	
		Insert 👻 🗙 Delete this step.			
	Create Invitation		ties		
	AutoMergeWF:C	reateDocument Set Proper	ucs		
Status: Draft					
				🔍 100% 🔻	

First, give your new step a meaningful name. Then hit [Set Properties] to define the settings:

F	ile Save and C	t Properties Webseiten lose AndAttachInvitation Step Input Propert		@ <u>H</u> elp ▼ Working on solution: Default Solution
	Property Name	Data Type	Value	Form Assistant
9 9 9	DebugThisRequest TemplateToExecute SaveAs PrintTo SaveOnlyIntoTemp	Two Options Lookup Single Line of Text Single Line of Text Two Options	False C True invitation.docx pdf ilsiter\HP LaserJet P2015 Series PCL 6 False True	Dynamic Values Dynamic Values Operator: Set to Look for: Contact Backoffice Customer
http	p://crm2011r6-de:5555/	/pofne 육 Lokales Intran	et Geschützter Modus: Inaktiv	Add



The "CreateDocument" functionality provides the following properties:

2.1.1.1 DebugThisRequest

If this box is set to "True" the AutoMerge Plugin will write debug information while the creation of the template. This is only required if this part of the process doesn't work correctly. Due to the fact that it will slow down the whole process, we recommend setting it to "False" in normal cases.

2.1.1.2 TemplateToExecute

Use this lookup-field to select a template. It will be the base of your generated document. You have the choice between all templates stored in the "DocumentsCorePack Templates" entity in CRM. Please note that the selected template must be compatible with the entity of this workflow. That means if you create for example a workflow for the entity "contact", the starting entity of the selected template has to be "contact" as well. Please also keep in mind that **only ".docx" templates will work** with AutoMerge.

2.1.1.3 SaveAs

Here you have the possibility to define the data type of the created document. The following file extensions are available. The left column shows the text you have to type in and the left one the file extension of result document.

You have to type in	File extension
text	.txt
png	.png
jpeg	.jpg
html	.html
epub	.epub
doc	.doc
docx	.docx
bmp	.bmp
pdf	.pdf

If you leave this field empty, ".docx" will be taken as default type.

2.1.1.4 PrintTo

This field gives you the possibility to define the path of a network printer. If AutoMerge can find an available printer by following this path, the document will be printed out after the creation.

2.1.1.5 SaveOnlyIntoTemp

If this option box is set to "True" the generated document will only be stored in the "MSCRM-ADDONS.com User/Temp Settings" of CRM. If it is set to "False" the document will be stored in a file share or SharePoint additionally, depending on the adjustment of the DocumentsCorePack Server.

2.1.2 AttachToEmail

Select this option to attach a created document to an existing email. This step is often used in combination with the "SendEmail"-step described later.



Important: If the file type of the generated document you want to be attached is "html", its content will be copied into the email body. If it is any other file type, the generated document will be added as attachment to the email.

🤗 Process: CreateAndAttachInvitation - Windows Internet Explorer				
File 🛃 🔀 Save and Close	📑 🛛 🖉 🔿 Activate	다음 Show Dependencies	ès <u>A</u> ctions →	@ <u>H</u> elp ▼
Process: CreateAndAttach	Invitation		W	orking on solution: Default Solution
	General Administratio			
▲ Processes	Process Name *	CreateAndAttachInvitation	Entity	Contact
🚱 Workflows	Activate As	Process	Category	Workflow
	Available to Run		Options for Aut	comatic Processes
	As an on-deman	d process	Scope	User
	As a child proce	55	Start when:	Record is created
				Record status changes
				Record is assigned
				Record fields change
				Record is deleted
	📑 Add Step - 🔤	nsert 👻 🗙 Delete this step.		
	Create Invitation			
	AutoMergeWF:Cr	eateDocument Set Propert	ies	
	Attach created D	ocument to Email		
	AutoMergeWF:At	tachToEmail Set Properties		

First, give your new step a meaningful name. Then hit [Set Properties] to define the settings:

2	Set Custom Step Input Pr	roperties Webseitendi	alog	×
F	ile 🛛 🛃 Save and Clos	e		@ <u>H</u> elp ▼
E	Process: CreateAnd	dAttachInvitation P Input Properti	es	Working on solution: Default Solution
	Property Name	Data Type	Value	Form Assistant >
ø	DebugThisRequest	Two Options	False C True	Dynamic Values 🔻
A	EmailToAttache	Lookup	Mitation	Dynamic Values
9	DocumentGUID	Lookup	{MSCRM-ADDONS.com User/Tem	p Se Operator: Set to Look for: Create Invitation:OutputDocume ▼ MSCRM-ADDONS.com User/Tem ▼ Add MSCRM-ADDONS.com User/Temp Si



The "AttachToEmail" functionality provides the following properties:

2.1.2.1 DebugThisRequest

If this box is set to "True" the AutoMerge Plugin will write debug information while executing this request. This is only required if this part of the process doesn't work correctly. Due to the fact that it will slow down the whole process, we recommend setting it to "False" in normal cases.

2.1.2.2 EmailToAttach

This lookup can be used to define the email to which the created document should be attached.

You have the possibility to select an existing email, but you can also refer to one in this workflow earlier created email as well.

2.1.2.3 DocumentGUID

This lookup provides the possibility to select the document which should be attached. The handling of this property is similar to the above one. You can select an existing document by clicking on the lookup button and you can also use a document created in this workflow before.

2.1.3 AttachToLetter

Select this option to attach a created document to an existing letter.

Process: CreateAndAttachInvitation	ion - Windows Internet Exp	olorer		
File Save and Close Process: CreateAndAttach C. Information	🛃 🞚 🖸 Activate	백금 Show Dependencies 🤌	<u>A</u> ctions →	@ Help + Working on solution: Default Solution
▲ Common	General Administration	on Notes		
Information ☑ Audit History	 Hide Process Propert 	ies		
▲ Processes	Process Name *	CreateAndAttachInvitation	Entity	Contact
🥳 Workflows	Activate As	Process	Category	Workflow
	Available to Run	ad process	Scope	User
			Start when:	Record is created Record status changes
				Record is assigned
				Record fields change
				Record is deleted
	Add Step - ⊒-=]	(nsert 👻 🗙 Delete this step.		
	Create Invitation		_	
	AutoMergeWF:C		S	
	Attach created D AutoMergeWF:At	ttachToEmail		
	Attach created D			
	AutoMergeWF:A	ttachToLetter Set Properties		

First, give your new step a meaningful name. Then hit [Set Properties] to define the settings:



Set Custom Step Input	Properties Webs	eitendialog	X
File Save and Cl	ose		@ <u>H</u> elp ▼
342	andAttachInvitation		Working on solution: Default Solution
Property Name	Data Type	Value	Form Assistant >
 DebugThisRequest LetterToAttache DocumentGUID 	Two Options Lookup Lookup	 False C True Invitation AM Doc ca649f91-bebe-486 ÷ □ 	Dynamic Values 🔺
http://crm2011r6-de:5555/	'p 👊 Lokales Intrar	net Geschützter Modus: Inaktiv	ОК

The "AttachToLetter" functionality provides the following properties:

2.1.3.1 DebugThisRequest

If this box is set to "True" the AutoMerge Plugin will write debug information while executing this request. This is only required if this part of the process doesn't work correctly. Due to the fact that it will slow down the whole process, we recommend setting it to "False" in normal cases.

2.1.3.2 LetterToAttach

This lookup can be used to define the letter to which the created document should be attached.

You have the possibility to select an existing letter, but you can refer to one in this workflow earlier created letter as well.

2.1.3.3 DocumentGUID

This lookup provides the possibility to select the document which should be attached. The handling of this property is similar to the above one. You can select an existing document by clicking on the lookup button and you can also use a document created in this workflow before.

2.1.4 DeleteTempDocument

Select this option to delete an existing document from the "MSCRM-ADDONS.com User/Temp Settings" entity.



Process: CreateAndAttachInvitation - Windows Internet Explorer							
File 🛃 🛃 Save and Close	🛃 🕕 🖸 Activate	팩클 Show Depende	encies 🐞 <u>A</u> ction	ns → 🕜 <u>H</u> elp →			
Process: CreateAndAttach	Invitation		Working	on solution: Default Solution			
▲ Common	General Administration	n Notes					
 Information Audit History 	✓ Hide Process Properties						
▲ Processes	Process Name *	CreateAndAttachInv	/i Entity	Contact			
🚱 Workflows	Activate As	Process	Category	Workflow			
	Available to Run		Options for Au	tomatic Processes			
	As an on-demand	1 process	Scope Start when:	User			
	As a child process			Record is created			
	i a a child proces.	,		Record status change			
				Record is assigned			
				Record fields change			
				Select			
				Record is deleted			
	Add Step 👻 🛛 🚽 🖛 In	sert 🗸 🗙 Delete ti	nis step.				
	Create Invitation						
			t Properties				
	AutoMergeWF:Cre Attach created Do		et Properties				
	 Attach created Do 						
	AutoMergeWF:Atta		roperties				
	Attach created Do						
	AutoMergeWF:Atta		Properties				
	Delete temporary	Invitation					
	AutoMergeWF:Del	eteTempDocument	Set Properties				

First, give your new step a meaningful name. Then hit [Set Properties] to define the settings:

2	Set Custom Step Input	Properties Webs	seitendialog	×
F	ile 🔜 Save and C	lose		@ <u>H</u> elp ▼
ſ	258	AndAttachInvitatior		Working on solution: Default Solution
	Property Name	Data Type	Value	Form Assistant >
•	DebugThisRequest	Two Options		Dynamic Values 🔻
	DocumentGUID	Lookup	{MSCRM-ADDONS.com User/Temp S	Dynamic Values
				Operator: Set to Look for: Create Invitation:OutputDocume ▼ MSCRM-ADDONS.com User/Tem ▼ Add X ▲ MSCRM-ADDONS.com User/Temp Set



The "DeleteTempDocument" functionality provides the following properties:

2.1.4.1 DebugThisRequest

If this box is set to "True" the AutoMerge Plugin will write debug information while executing this request. This is only required if this part of the process doesn't work correctly. Due to the fact that it will slow down the whole process, we recommend setting it to "False" in normal cases.

2.1.4.2 DocumentGUID

This lookup provides the possibility to select the document which should be removed. You can select an existing document by clicking on the lookup button and you can also use a document created in this workflow before.

2.1.5 SendEmail

Use this step to send an existing email.

Add Step 🗸 📋 🔤 Insert 👻 X Delete this step.
Create Invitation
AutoMergeWF:SendEmail Set Properties
Attach created Document to Email
AutoMergeWF:AttachToEmail Set Properties
Attach created Document to Letter
AutoMergeWF:AttachToLetter Set Properties
Delete temporary Invitation
AutoMergeWF:DeleteTempDocument Set Properties
Send Email
AutoMergeWF:SendEmail Set Properties

First, give your new step a meaningful name. Then hit [Set Properties] to define the settings.

Set Custom Step Input Properties Webseitendialog	×
File Save and Close	
Process: CreateAndAttachInvitation Set Custom Step Input Properties	Working on solution: Default Solution
Property Name Data Type Value	Form Assistant >
DebugThisRequest Two Options 📀 False 🔿 True	Dynamic Values 🔹
EmailToSend Lookup Invitation	
http://crm2011r6-de: 😪 Lokales Intranet Geschützter Modus: Inaktiv	14. 14.



The "SendEmail" functionality provides the following properties:

2.1.5.1 DebugThisRequest

If this box is set to "True" the AutoMerge Plugin will write debug information while executing this request. This is only required if this part of the process doesn't work correctly. Due to the fact that it will slow down the whole process, we recommend setting it to "False" in normal cases.

2.1.5.2 EmailToSend

This lookup field can be used to define the email which should be sent. You have the possibility to select an existing email, but you can refer to one in this workflow earlier created email by using the "Form Assistant" as well.

2.2 Workflow (CRM Online)

First of all, start in the settings of your CRM system (see screenshot ellipse 1) and click on 'Processes' in the sitemap (see screenshot ellipse 2).

Condserver	Standard(hain.arg)#		🔍 🗽 Processes: All Processes - M 🗙 🎿 Pr	ocess: test				
				Microsoft Dynamics CRM	4			cmatria,
PowerSearch								Standard
Normal Search	Ocument Search							
Normal Search	Document Search							
rttings 🕼 📿 -								
wknown1	Processes: All Processes -						Search for records	
Imports	They A R & X OAdvate ODeadly	ate More Actions	1-					
	Process Name +	Category	Primary Entity	Satus	Created On	Owner	Owning Business Unit	
	Account OverView	Workflow	Account	Activated	2/3/2012 6:39 AM		Standard	
macrim-addons settings	C 2. Generate Account Document	Dialog	Account	Activated	2/4/2012 4/08 PM		Standard	
MSCRM-ADDONS.com P.	T 2 Generate Contract	Workflow	Contract	Activated	9/20/2012 9:35	Michael Dohr	Standard	
MSCRM-ADDONS.com U	T 😤 Implice - test wf	Workflow	Involce	Activated	3/13/2012 8:50	Michael Dohr	Standard	
PowerSearch Config Text Parts	T 2 Involce as PDF	Workflow	Involce	Activated	3/9/2012 10:02	Michael Dohr	Standard	
nknown4	T 2. Print Account OverView	Dialog	Account	Activated	11/14/2012 7:25-	Michael Dohr	Standard	
Dusiness Management	C 2. Print Account OverView thru Service	Dialog	Account	Activated	11/14/2012 8:03	Michael Dohr	Standard	
Templates	C 🐍 Quote as DOCX	Workflow	Quote	Activated	3/9/2012 7:19 AM	Michael Dohr	Standard	
Product Catalog	C & Quote as DDCX with CreateActivityFor	Workflow	Quote	Activated	3/12/2012 11:49	Michael Dohr	Standard	
	C & Quote as PDF	Workflow	Quote	Activated	3/9/2012 7:12 AM	Michael Dohr	Standard	
Administration Data Management	T 🐍 test	Workflow	Account	Draft	11/19/2012 4:13	ermadmin_	Standard	
hterovensi Customizations Solutions Customis Customis Customis Customis Customis Customis Customis Customis Customis Customis Customis Customis Customis Customis Customis Customis Customisations Custom								
Workplace								
Sales								
Marketing								
Service 1								
Settings	1 - 11 of 11 (0 selected)							14. 4 Page
						N O	P Q R S T U	
Resource Center	Al # A B C	D 8	E F G H I		L M			

Then click on 'New' to create a new workflow. A webpage dialog pops up (see next screenshot). Type in a name, determine an entity and choose 'Workflow' as the process category. Afterwards, click on 'OK'.



🗿 Process: New Web	page Dialog			×
	ss definition or a process based ogs and workflows.	on an existing template. Th	ere are two categori	es of processes
Process name: * Entity: *	test_workflow Account	Category: *	Workflow	
Туре:				
New blank process				
O New process from a	an existing template (select from	list):		
Template N	√ame ▲	Primary Ent	ity	Owner
		No process te	mplate records are a	vailable in t
0 - 0 of 0 (0 select	ted)		н	4 Page 1 ▶
Properties				
			ОК	Cancel
ittp://crm4server/Standard	d/sfa/workflow/workflowTer 🔦 Lo	ocal intranet Protected Mode	e: Off	

After clicking on 'OK', you will see the following window. Start to define and add the steps you would like to have in your workflow. If you would like to e.g. create the document as a first step of your workflow, click on the 'Add Step'-drop-down menu and select 'Create Record'. (see screenshot below)

🖬 🛃 Save and	Close 🎯 🛛 🖞 🖉 Athlate 🖉 Show Dependencies 👋 gittlons •		😨 Bes
Process: test_workfl Information	0w		Working on solution: Default Solution
	General Administration Notes		
non Information Audit History	Hide Process Properties Rocess Name * Past, workflow	Every Freeburnt	
Workflows	Activate As Process	Category Workfore	
	Available to Run	Options for Automatic Processes	
	C As an on-demand process	Scope User	
	T As a child process	Start when: IF Record is created	
		Record status changes	
		Record is assigned Record fields change Select	
		Record heads change	
		1 Kecord is deveted	
	And Step -) 3rd Insert - X Delete this step.		
	1733 e		
	Check Condition		
	Conditional Branch		
	Default Action		
	Wait Condition		
	Paralel Walt Brands		
	Upsete Record		
	Asign Record		
	Send Losal		
	Start Child Workflow		
	Change Status		
	Stop Wonflow		
	AutoMergeWF +		

Now, the first step is added to your workflow. Type in a description of the step, e.g. create document. Afterwards, open the drop-down menu within this first step, select `MSCRM-ADDONS.com AutoMergeWorkingItems' and click on `Set Properties'. (see next screenshot)



🖬 🛃 Save and Ci	ose 🎯 🔋 🖉 Activate 🛛 🖷 Show Dependencies 🔌 Actions -		👽 Beo
ocess: test_workflo	*		Working on solution: Default Solution
	General Administration Notes		
n formation udit History es ont/fows	Mite Process Properties Process Name* Process Name* Process Proce	Fetty Extrant Chargery Encode Chargery Control for Automatic Processes Social Social Control for Extra Social Control	
		F Record Fields change Select	
	🔯 Add Step + 3rd Insert + 🗙 Delete this step.		
	Type a step setoryption here. Create: MSCSM.aDDDNS.com.A.W) Set Properties		
	Internet according to the second seco		
un.			

The following window will open to configure the first step of your workflow. (see screenshot below) Type in a name and define the AutoMerge-action. In our example, we select the action 'CreateDocument'.

reateDocument	Owne SaveAs SaveOnlyIntoTemp PrimaryRecordUrl	C No @ Yes		Dynamic Values Dynamic Values Operator: Set to Look for: Account
reateDocument	SaveOnlyIntoTemp	C No @ Yes	×	Operator: Set to Look for:
reateDocument	SaveOnlyIntoTemp	C No € Yes	×	Set to Look for:
reateDocument	SaveOnlyIntoTemp	C No © Yes	•	Look for:
		C No @ Yes		
Q	PrimaryRecordUrl			Account
				Add
				× • •
				l Default value:
				ок
				UK
	a a	0 0 0		

After that, choose the template to be used within the workflow (see next screenshot ellipse 1) and the file format the document should be saved as (see next screenshot ellipse 2).

Furthermore, it is very important to insert the 'PrimaryRecordUrl'. For that, set the cursor in the 'PrimaryRecordUrl'-field and go to the 'Look for'-area within the form assistant on the right side. Select 'Record URL(Dynamics)' from the second drop-down-menu (see next screenshot, ellipse 3 and 4), click on 'Add' and then on 'OK'. After that, the



'PrimaryRecordUrl'-field is filled out automatically. (see next screenshot, colored in yellow) Click on 'Save and Close'.

General						
Process: test_wo Create MSCI General	orkflow					🕜 <u>H</u> elp
Create MSCI	orkflow					
General	RM-ADDONS.com AutoMer	a Marki	naltons			
	RWI-ADDONS.com Automen	geworki	ngitems			
						Form Assistant
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The first step of your workflow is now added and fully configured. In case you want to stop your workflow at this point, you can click on 'Save and Close' and finish here. In case you want to add further steps to your workflow, define a condition to be fulfilled before adding further steps. For example, if you want to create a letter-activity with the previously generated document as an attachment, you need to make sure that the document creation is completed before attaching the document to the letter activity. To do so, open the 'Add-Step' drop-down menu again and select 'Wait Condition'. (see screenshot below, red ellipse)

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The step is added to the workflow. Type in a step description and click on `<condition> (click to configure)'. (see screenshot below)

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After that, a window pops up. In this window, you can define the condition to be fulfilled for workflow proceeding. In our case, we select 'Create document (MSCRM-ADDONS.com AutoMergeWorkingItems)' from the first drop-down menu, 'Status' from the second drop-down menu, 'Equals' from the third drop-down menu and 'Inactive' from the fourth drop-down menu. (see next screenshots). Click on save and close. Now, you have determined that step 2 of your workflow (in our example to attach the created document to a letter-activity) will only be executed if the first step, namely the document generation, has finished successfully.



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Afterwards, your workflow configuration will look like in the following screenshot.



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To add another step, e.g. to create a letter-activity, click on 'Select this row and click Add Step' (see screenshot ellipse 1) and afterwards on 'Add Step'. (see screenshot, ellipse 2)

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Then, select 'Create Record' from the drop-down menu. The new step is now added to your workflow and ready for configuration. Type in a step description (e.g. Attach document to letter), open the drop-down menu within this second step and select 'Letter'. (see next screenshot)



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Afterwards, click on 'Set Properties' and a letter-activity-window will open. (see screenshot below) Within this window, define a sender, a subject and type in your letter-text. Then, set the cursor in the 'Recipient'-field to define the recipient. To do so, go to the 'Look for'-area within the form assistant on the right side. Select 'Account' in both drop-down-menus, click on 'Add' and then on 'OK'. Now the 'Recipient'-field is filled out correctly (see screenshot below, colored in yellow).

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Click on 'Save and Close'. Now you are back in the general workflow-window again and you can see the added and completely configured letter-activity. In a next step, you have to define that the previously created document should be added to this letter-activity. For that, click on 'Add Step' and select 'Create Record' from the drop-down menu. (see next screenshot)



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Type in a step description and open the drop-down menu within this step. Select 'MSCRM-ADDONS.com AutoMergeWorkingItems'. (see screenshot below) Then, click on 'Set Properties'.

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A window will pop up to configure the 'AttachToLetter'-workflow-step. Put a name and define the AutoMerge action (in this example choose 'AttachToLetter', see screenshot, ellipse 1) Within the 'Attach to Letter'-section, determine the letter-activity to which the created document should be attached to (see screenshot 'LetterToAttach-field, ellipse 2) and the document which should be attached (see screenshot 'DocumentGUID_Letter'-field, ellipse 2).



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For determining the letter-activity the document should be attached to, set the cursor in the 'LetterToAttach'-filed in the 'Attach To Letter'-area (see screenshot, ellipse 1) and select the correct letter-activity from the drop-down menu in the 'Look For'-area within the form assistant on the right side. (see screenshot, ellipse 2). After that, click on 'Add' and 'OK'.

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To determine the document to be attached, set the cursor in the 'DocumentGUID_Letter'field (see screenshot, ellipse 1) and select the correct document from the drop-down box in the 'Look For'-area within the form assistant on the right side. (see screenshot, ellipse 2) Click on 'Add' and 'OK'.



	Randard)sfa/workflow/edt.aspx?id=494ae530-a4c5-	4617 2020 1027 P 🗴 🙀 hoceases All hoceases - Hona. 🙀 hoceases test workflow 🛛 🗙	
	🎒 🌒 🔾 Activate 🖷 Show Dependen	nčes 🗞 gitions •	😢 Helb -
Process: test_workflow			Working on solution: Default Solution
	General Administration Notes	🔮 MSCR4 ADODNS.com AutoMergelWarkingBerns: New - Microsoft Dynamics CRM Webpage Dialog	
Common Suffermation		Seve and Close @ Ber -	
Audit History	 Hide Process Properties 	Process: test workflow	
A Processes	Process Name * test_workflow	Create MSCRM-ADDONS.com AutoMergeWorkingItems	
G Workflows	Activate As Process		
	Available to Run	• Veneral	
	As an on-demand process	Name* AttachToLetter Owner C Dynamic Values	
	As a child process	AutoMergeAction AttachToLetter Dynamic Values	
		Create Document Operator	
		Template/Decute C SaveAs Final Final Fi	
		Primary (nit)y	
		CreatedDocument C PrimaryReconduit Acourt Related Collisien	
	Add Step • 🖧 Insert • 🗙 Delete thi		
	Create document	Letter/Bultache [Jetter/Ettach document to letter [Letter]]	
	Create: MSCRM-ADDONS.com A		
	S • Walt condition: document creation fini	Attach to small Originating lead (sed)	
	Walt until Create document (MSCRM-A)	Owning Team (Team)	
		Parent Account (Account)	
	Create: Letter	Preferred Service (Service)	
		Price List)	
	Create: MSCRM-ADDONS.com	Territory (Territory)	
		Decamentulus_Decament_MISCRM_ADDONS.com AutoMergeWorking/bensi	
		Return Value Process Create	document (MSCRM-ADDONS.com
		ReturNaue	ergetWorkingRems)
		http://om/serve/Standard/SAN/volflow/entity/form.asp/entity/fulliame-ptm_autonergeworkingteentityname-ptm_autonerg 🗞 Local into area [Protected Mude: Off	
		· · · · · · · · · · · · · · · · · · ·	
Status: Draft			
Arstart 🛃 🛛 🧮	3 🥝 🔙 🖉		DE 8 💬 🗓 🐑 🚱 👔 11:40

You have now completed the configuration of this step. Click on save and close. In case you want to stop your workflow at this point, you can click on 'save and close' within the general workflow-configuration-window and finish here. In case you want to add further steps to your workflow, you have to define a condition to be fulfilled before you add further workflow-steps. In that case, open the 'Add-Step' drop-down menu again and select 'Wait Condition'. Click on '<condition> (click to configure)' and a window will pop up. In this window, define which condition has to be fulfilled for further workflow proceeding. In our example, we want the workflow to proceed when the created document has been attached to the letter-activity. In our case, we select 'Attach document to letter step 2 (MSCRM-ADDONS.com AutoMergeWorkingItems)' from the first drop-down menu, 'Status' from the second drop-down menu, 'Equals' from the third drop-down menu and 'Inactive' from the fourth drop-down menu. (see next screenshots). Click on 'Save and Close'.

cess: test_workflow Information		
Information	General Administration Notes	
	Hide Process Properties	
	Process Name * Pest, workflow	Entry Account
foes	Activité As Specify Condition Webpage Dialog	×
	Available to Run	Bip +
	T As a child proce	Form Assistant >
	Attach document to letter a. Status Equals inactive	Dynamic Values
	Sent	Dynamic Values
		Look for Account
	Add Step + 1 24 3	Status
	Create document	
	Create: MSCRN	
	* Wait condition: E	
	Wait until Create # Attach so	
	Orate	
	* Attach do	
	Create:	
	Walt conc	
	Wait until Sea	
	http://om4server/Standard/Condition/Condition.aspc/Unitly5d=494aet330-a4c5-4c47-btba-bb7aaa4bt7e68d:spression	Type-tens No. Local Intranet Protected Mode: Off

Now you can add another workflow-step. In our example, we want the document to be deleted after it has been attached to the letter-activity. To do so, click on 'Select this row and click' and open the 'Add Step'-drop-down menu. Select 'Create Record'. Afterwards, type in a step-description, choose 'MSCRM-ADDONS.com AutoMergeWorkingItems' from the drop-down box within the step and click on 'Set Properties'. A window will pop up in which you can determine that the created document should be deleted after it has been



attached to the letter-activity. For that, put a name and an AutoMerge activity (in our example 'DeleteTempDocument'). Afterwards, click in the 'DocumentGUID_Delete'-field within the 'Delete Temp Document'-area (see screenshot, ellipse 1) and select the document to be deleted from the drop-down box in the 'Look For'-area within the form assistant. (see screenshot, ellipse 2)

Process: test_workflow - Winds	wws Internet Explorer		_ # ×
Carlos - 🚂 http://cm4server/S	Randard[sfa]workflow]edR.aspx?id=41Hae530-a4c5	Sale (7 856-4677 🖉 🛨 🗲 🗶 Processes: All Processes: All Processes: List_workflow 🗙	
Tree 🖬 🛃 Save and Close	🎯 🧃 😋 Activate 🖷 Show Depender	encies 🗞 Actions =	😨 Beb +
Comment C	Annue		6 ☆ 0
		Consention of the set of the	who years and years
Af Start 选 🛃 🧮	3 🥝 📙 🖉		DE 🖈 🗁 🕅 💬 🔥 12:02 12:12:2012

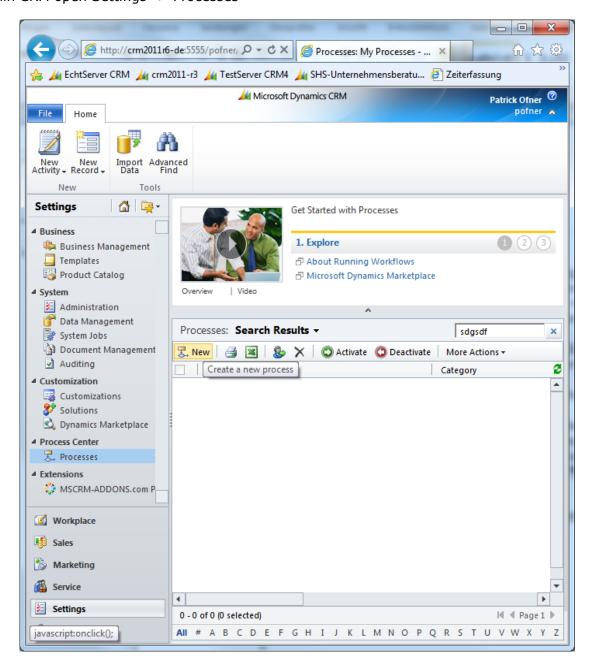
Click on 'Save and Close'. After that, you have finished your workflow configuration and you can click on 'Save and Close'.

Process: test_workflow - Wind	dows Internet Explorer		_ 8 ×
() (cm/server/	(Standard) if glworlflow/edit.asp./td=494ae530.a4c54c47.85ba8b71: 🖓 💌 😝 🗶 Processes: All Processes - Micro 🔒 Process: text_worlflow	×	
Tie 🖬 🛃 Save and Close	③ Ø O Att/vate ∞Show Dependencies % actions •		🙃 Reih -
Process: test_workflow			Working on solution: Default Solution
4 Common	General Administration Notes		
Audit History	* Hide Process Properties		
4 Processes	Process Name * Test, workflow	Entity Account	
G Workflows	Activate As Process	Category Workflow	
	Available to Run	Options for Automatic Processes	
	As an on-demand process	Scope User	
	As a child process	Start when: IF Record is created	
		Record status changes	
		Record is assigned	
		Record fields change Select	
		Record is deleted	
	🚍 Add Step - 🛛 🖓 Inset - 🗙 Delete this step.		
	Create document		
	Create: MSCRM-ADDONS.com A Set Properties		
	Walt condition: document creation finished		
	Walt until Create document (MSCRM-ADDONS.com AutoMerpeWorkingItems)Status equais (Inactive), then:		
	Attach document to letter		
	Create: Letter v Set Properties		
	Attach document to letter step 2		
	Create: MSCRM.ADDONS.com A Set Properties		
	Walt condition: attach to letter finished		
	Wait until Attach document to letter step 2 (MSCRM-ADDONS.com AutoMergeWorkingItens) Status equals [Inactive], then		
	Delete document		
	Create: MSCRM-ADDONS.com A Set Properties		
Status: Draft			
19mt 🔍 🛜 🖰			DE 2 DE 10 90 00 12:05



2.3 Dialog

From a dialog you can use the same AutoMerge steps as from a workflow. This chapter shows how you can access these functionalities. Within CRM open Settings -> Processes



The next step is to create a new dialog. This works nearly the same way as creating a new workflow.

Hit [New] as shown in the screenshot. Thereupon the following window will appear:



Process: New Webseitendialog			
Create Process Create a new process defin of processes you can create	ition or a process based on an , dialogs and workflows.	existing template. Ther	e are two categories
Process name: *	AttachLetterToLead		
Entity: *	Lead	Category: *	Dialog 🔻
Туре:			
New blank process	ng template (select from list):		
	ng template (select from iss)	Dimension Settin	
Template Name 🔺		Primary Entity	/
			- late and a late
		No process tem	plate records
0 - 0 of 0 (0 selected)			H ◀ Page 1 ►
Properties			
		ОК	Cancel
htt 👊 Lokales Intranet Geschü	itzter Modus: Inaktiv		
inter 📲 cokales intranet Geschi	itzter woulds: maktiv		H.

Type in a name of the new dialog, define the starting entity and select "Dialog" in the drop down box. To start with a new dialog, select "New blank process". Hit [OK] to proceed.

Then the dialog configuration window will appear.



File Process: AttachLetterTo	Lead	Working on solution: Default Solution
🛃 🛃 Information	General Administration Notes	
Common . Information	▼ Hide Process Properties	
Audit History	Process Name * AttachLetterToLead En	tity Lead
Dialog Sessions	Activate As Process Ca	bialog
	Available to Run	
	As an on-demand process	
	As a child process	
	Add Step ▼ □	
	Page	
	Prompt and Response	
	Check Condition	
	Conditional Branch	
	Default Action	
	Query CRM Data Step.	
	Assign Value	
	Create Record	
	Update Record	
	Assign Record	
	Send E-mail	
	Start Child Workflow	
	Link Child Dialog	
	Change Status	
	Stop Dialog AutoMergeWF AttachToEn	
	AutoMergeWF AttachToEn AttachToLe	
	CreateDoct	
		pDocument

Here you can see that the AutoMerge add-in provides the same steps for dialogs.

Due to the fact that these work totally the same way as for workflows, they aren't described once again in this section. Please see chapter: "2.2.1 CreateDocument" downwards for more information regarding the steps.



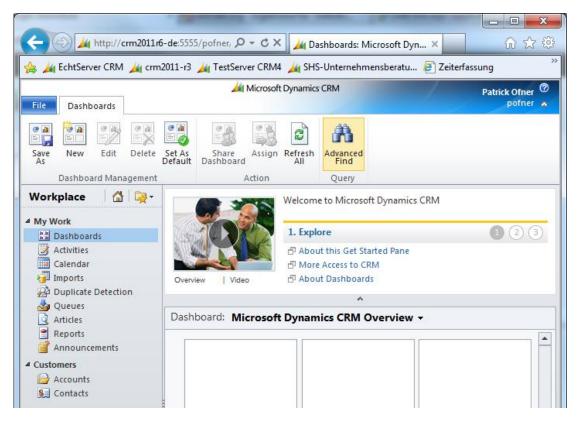
3 Temporary Document

Every time when you create a new document by using the "CreateDocument" step it will be stored in the "MSCRM-ADDONS.com User/Temp Settings".

The normal way is to save it on the SharePoint as well or attached it to an activity and to delete it at the end of the process by using "DeleteTempDocument" step.

But especially for developing your process it could be very helpful not to delete it automatically (e.g. if you want to continue working with this temp document). How this can be done is described underneath:

Within CRM hit [Advanced Find]



Then the following window will open:

Advanced Find - Microsoft Dynamics CRM - Windows Internet Explorer				
	🚈 Microsoft Dynamie	CS CRM	Patrick Ofner 😨	
File Advanced Find	Save As	[{≣ Group AND		
Query Saved Results Views	New Save	(E Group AND (E Group OR Clear	Download Fetch XML	
Show	View	Query	Debug	
Look for: MSCRM-ADDONS.com User/ Use Saved View: [new]				
Select				



In the "Look for" box select the "MSCRM-ADDONS.com User/Temp Settings" entity. To receive all stored settings only hit [Results].

Advanced Find - Microsoft Dynamics CRM - Windows Interne	t Explorer
List Tools File Advanced Find MSCRM-ADDONS.com User/Temp Setting	Patrick Ofner @ pofner *
New MSCRM-ADDONS.com User/Temp Settings Records Collaborate	Image: Start Workflow Start Data Process Image: Start Transmission
Name Name	Created On 🔻 💋 😴
AM_Doc_bc4910fc-7fad-4309-95d1-1b3e59302e69	3/21/2012 8:34 AM
🔲 🛟 AM_Doc_fea045ae-545a-4b24-91e4-863b95e07a5b	3/20/2012 3:41 PM
🔲 🛟 AM_Doc_0295b8f2-9d8d-433d-816b-5258ba11a438	3/20/2012 3:41 PM
🔲 🛟 AM Doc ca649f91-bebe-4862-954a-00fee287a4b1	3/14/2012 1:55 PM
1 - 4 of 4 (0 selected)	M 🖣 Page 1 🕨
	🔍 100% 🔻 💡

To ensure that every record name is unique, AutoMerge stores them by using the following structure: "AM_Doc_" + a new Guid. If you want to have a look at the generated document directly, douple click on the record

and navigate to the "Notes"-section.

AMSCRM-ADDONS.com User/Temp Settings: AM_Doc_bc4910fc-7fad-4309-95d1-1b3e59302e69				
Microsoft Dynamics CRM Patrick Ofner				Patrick Ofner 🥝
File MSCRM-ADDONS.com User/Temp Settings		Add Customiz	e	pofner 🛆
Save & New	📄 Sharing 🗸		11 C	
Save Save &	📆 Copy a Link	Run Start	Run	
Close X Delete	🖥 E-mail a Link	Workflow Dialog	Report +	
Save	Collaborate	Process	Data	
Information General Notes Related Common Audit History Processes Workflows Dialog Sessions	AM_C AM_C Notes Add a new no Junt Title: Note created Patrick Ofner	on 3/21/2012 8:34 A		ONS.com Us



There you can see the generated document attached.

Its name is taken from the "Document Name"-setting of the template. If the name is not defined, the default structure ("AM_Doc_" + a new Guid) will be taken.

In this example the generated document is of the type ".pdf" This was defined in the "SaveAs" property of the "CreateDocument"-step.

To open the document click on it and your web browser will provide you different ways to achieve this.



4 DCP Client / Templates

For generating documents using AutoMerge you need **.docx templates** as a base.

This section is dealing with templates. It describes what the necessary steps to create them.

To be able to create or modify templates the DocumentsCorePack Client is required. It can be downloaded from our website by using the following link: <u>DocumentsCorePack</u>.

Before you install the DCP Client we recommend reading the "Install Guide", especially chapter 6 "Installing the client component". The whole guide can be found here: <u>Installing DocumentsCorePack</u>.

At this point, the foundation stone for working with templates is laid. The following link will direct you to the DocumentsCorePack User Guide. Chapter 2 "DocumentsCorePack Templates" will walk you through the steps for creating templates.

Please keep in mind that only .docx (Office Open XML) templates are compatible with AutoMerge.

Here is the link to the user guide: DocumentsCorePack User Guide



How to filter linked entities during the merge process 5

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 deleted afterwards.

Otherwise, the usual merge process remains unchanged.



Example

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

Information	Account Accounts		
 General Account Charts Details Preferences 	Primary Contact		
Related	🦾 🚛 Contacts: Contact Associ 🝷		
▲ Common	Full Name 🔺		
More Addresses	🕅 🖳 🥚 Haas, Frank		
Activities	📃 🕵 🥚 Haas, Frank (Privat)		
Closed Activities	📄 🙀 🍥 Kokely, Christoph		
Sub-Accounts	📄 🕵 👴 Korosec, Peter		
Selectionships	🥅 👧 🛛 e List, Andreas		

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.

	DDONS.com User/Temp Settings ilter {C9D75E9F-1336-E111-945B-00155DC8AE09} account {BD917846-5CAE-E
▼ General	
Name *	AMPreFilter[C9D75E9F-1336-E111-945B-00155DC8AE09][account][BD917846-5CAE-E111-BA50-00155DC8AE09][contact][FE6A9F9C-57C4-E111-A7C1-00155DC8AE09]]
Value	<pre><fiiter><entity>new_personaldispo</entity><values><value>(12E5214A-88BF-E111-A7C1-00155DC8AE09)</value>><value>(0066B9F9C-57C4-E111-A7C1- 00155DC8AE09)</value></values></fiiter></pre>
Notes	
Status	Active



6 How to print documents with AutoMerge (depreciated)

There is a complete new Printing Solution in place since version 5.38. We made a separate document for the new Printing Solution. Please download the AutoMerge Printing Guide from our homepage.

This chapter explains how to print documents with AutoMerge. It deals with the prerequisites, namely to install and add a printer before using it with AutoMerge, the specific settings for plug-in-based printing and the procedure of service-based printing.

6.1 How to install and add a printer before using it with AutoMerge

With AutoMerge for MS Dynamics CRM 2011 On-Premise/Online, you are able to print the dynamically generated document automatically to a specific printer.

Before you can start to use this functionality, there are several things to do. Because AutoMerge runs as service with a service user, you have to install the printer as described in the steps below to ensure that the service user has access.

How to install a printer which is visible for services:

Go to the Control Panel -> Devices and Printers Click on "Add a printer" It is very important to select "Add a local printer" (see screenshot below)



Add a device Add a prints	Panel • All Control Panel Items • Devices and Printers	
	ed device icons and information from the Internet. Click to change	
Devices(1)	Add Printer	×
	🕜 📾 Add Printer	
	What type of printer do you want to install?	
CRM2011C360 Printers and Faxes (1) —	Add a local printer Use this option only if you don't have a USB printer. (Windows automatically installs USB printers when you plug them in.)	
Microsoft XPS Document Writer	Add a network, wireless or Bluetooth printer Make sure that your computer is connected to the network, or that your Bluetooth or wireless printer is turned on.	
2 items	Next Cance	8

Step through the rest of the wizard and create a new port.

Type in a simple name for the printer without using spaces. This makes it easier for you to retype the printer name in the different workflows of AutoMerge. (see screenshot below)



ad a	ld Printer		×
0	🖶 Add Printer		
	Type a printer name		
	Printer name:	HP2025	
	This printer will be insta	alled with the HP LaserJet P2015 Series PCL 6 driver.	
			Next Cancel

At the end, please try to print a test-page to see if it is working correctly.

6.2 Specific settings for plug-in based printing

With AutoMerge for Microsoft Dynamics CRM 2011 On-Premise/Online, you are able to print the dynamically generated document automatically to a specific printer. Sometimes, the printer settings regarding trays, duplex, size, etc. are not applied if you define them using a specific user account, because the service runs under different user accounts. In order to avoid this, AutoMerge offers you the possibility to define specific printing options in the workflow itself.

The table below lists all special settings which you can define for the printer in the workflow. To make use of them, you just have to add the options you need when entering the printer name in the workflow-configuration. Of course you can also combine settings, like in the following example:

HP2025|copycount=2|tray=3

NOTE: The settings listed below are valid for plug-in based printing processes only. Settings for service-based printing processes when using AutoMerge will follow soon. (Please click here to get details about service-based printing when using AutoMerge.)



AVAIL	AVAILABLE SETTINGS FOR PLUG-IN BASED PRINTING PROCESSES WITH AUTOMERGE						
Name	Possible values	Description					
mediasize	a3 a3rotated a4 a4rotated a5 a5rotated a6 a6rotated	If you have a specific mediasize you can use this setting. eg.: HP2025 mediasize=a4					
copycount	1-999	Define how many copies you want to have. eg.: HP2025 copycount=4					
duplex	onsided twosidedlongedge twosidedshortedge	For printers which are able to print twosided you can use this option.					
outputcolor	grayscale color monochrome	Define the color using this setting.					
tray	1-99	Each tray has a number and the first tray is normally auto select. In most cases, you have to try the different numbers to find out which number refers to which tray. e.g.: HP2025 tray=2					

6.3 Service-based printing with AutoMerge

AutoMerge now offers a service-based printing option which is available additionally to the already known plugin-based printing-option. The additional option is available within AutoMerge for MS Dynamics CRM 2011 v5.30 and higher and is based on a service which is running in the background.

This sub-chapter covers the following essential topics:

- Creation of a service for printing documents
- Adding the service-based printing step to a workflow
- Exception 1: Adding the service-based printing step to already existing workflows
- Exception 2: Adding the service-based printing step to workflows including a 'Delete Document'-step



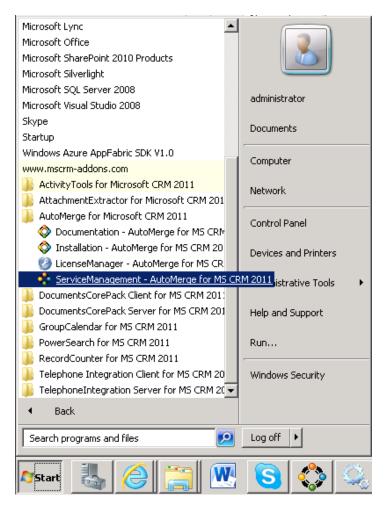
Before you continue reading, please make sure that you installed AutoMerge v5.30 or higher. After that, please proceed as described in the sections below.

NOTE: If you already run a service for printing documents (as this is quite usual when using AutoMerge with CRM Online), you can skip the first section of this article and can continue reading in the 'How to add the service-based printing step to a workflow'-section further down.

How to create and configure a service for printing documents using AutoMerge for MS Dynamics CRM 2011

Before you are able to add the service-based printing to a workflow, you need to configure and start a service. To do so, please follow the steps below:

1. Start the AutoMerge ServiceManagement from within the Windows start menu. (see screenshot below)





2. Here you can create a new service. Type in a name of the service (see screenshot, ellipse 1) and click on the green tick (see screenshot, ellipse 2).

Icome to the AutoMerge Service Ove tool will help you create and manage your		MISCIM-addons.CO
Add New Service	General Crm Connection Setup License Log	3 0 0
New service setup	1 ServiceName: AutoMergePrintService Conce Set, the servicename cannot be changed again)	
Active Services	General	
Inactive Services	Logfile Path:	
AM_Online_PTMEDV3 AM_TestService	Other: Activate Debugging Batch Size: Sound of service runs, before entering idle loop to limit CPU load Batch delay: Other Idle loop time in seconds Which type of jabs should this service work on? Could print jabs Filter: Could only print jabs Filter:	
	Stop Service Start Service Delete	Save service configuration
I: HeartBeatService is fine		Close

3. After that, you have to define which type of jobs the service should work on. Select 'only print jobs' (see next screenshot, ellipse 1). Furthermore, you have the possibility to set a filter for the printer to be used. (see next screenshot, ellipse 2) Setting this filter is essential e.g. in the following case: If you have offices in Austria and the US, you can type in the name of the printer located at your site (e.g. at your Austrian office) in order to avoid that your documents are printed by the printer located at the other site (e.g. at your American office).



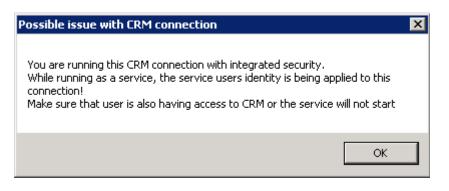
come to the AutoMerge Service On cool will help you create and manage you		mscrm-addons.cor
		@ 1
Add New Service	General Crm Connection Setup License Log	0 0 23
New service setup	ServiceName: AutoMergePrintService (Once set, the servicename cannot be changed again)	1
Active Services	- General	
Inactive Services	Logfile Path:	1
AM_Online_PTMEDV3	Other: Activate Debugging Batch Size: 25	
AM_TestService	Count of service runs, before entering idle loop to limit CPU load Batch delay: 90	
	Idle loop time in seconds	_
	1 C both	
	Only print jobs Z Filter:	-
	C only document generation jobs	

4. Then, switch to the 'CRM Connection Setup'-tab and type in the CRM Server-URL (see screenshot below, ellipse 1). After that, click on 'Save service configuration' (see screenshot below, ellipse 2).

AutoMerge Management (v. 5.30)		-0>
felcome to the AutoMerge Service Ov		nscrm-addons.con
his tool will help you create and manage you	r merge services	utoMerge for Microsoft CRM
Add New Service	General Crm Connection Setup License Log	0 0 23
New service setup	Standard (onPremise) C IFD (Hosted) C CRM Online C Office 365	
Active Services	CRM Server-Url:	
Inactive Services	Authenticated as:	
AM_Online_PTMEDV3	Use default Credentia Integrated Security (CRMTEST\administrator) Username Domain	
AM_TestService	Retrieve all Organizations	
	Organization information:	
	Friendly name Unique name ServiceURL	
	Reset LiveID Cache	OK Cancel
	Stop Service Start Service Delete	2 Save service configuration
bal: HeartBeatService is fine		Close



In case the following message box is popping up, click on 'OK'. (see screenshot below)



5. Afterwards, click on 'Start Service' and the service starts to run in the background (see screenshot below)

utoMerge Management (v. 5.30) Icome to the AutoMerge Service O tool will help you create and manage you		mscrm-addons.co
Add New Service	General Crm Connection Setup License Log	
New service setup	Select your Crm Type Standard (onPremise) C IFD (Hosted) C CRM Online C Offi	ice 365
Active Services	CRM Server-Uri:	~
Inactive Services	Authenticated as:	
AM_Online_PTMEDV3	Use default Credentia Integrated Security (CRMTEST\administrator) Username Domain Password	
AM_TestService	Retrieve all Organizations	
	Organization information: Friendly name Unique name ServiceURL Standard Standard Standard	
	Reset LiveID Cache	OK Cancel
	Stop Service Start Service Delete	Save service configuration
: HeartBeatService is fine		Close

After having configured and started the service for printing, you can start to configure a workflow including the service-based printing option. In the example below, we will highlight how to appropriately add this 'Print to'-step.

How to add the service-based printing step to a workflow

1. Start your CRM. Go to the 'Processes' within the 'Settings'-area . Here, you have the possibility to create a new workflow.



▲ Unknown138									
Reviews Review									
Workplace									
🥵 Sales									
🏠 Marketing									
🚳 Service									
🧃 TimeAttendant									
Settings									
8 Resource Center									

2. Start to create a workflow and to add the 'CreateDocument'-step. If you would like to add the service-based printing step afterwards, click on 'Add Step' (see screenshot, ellipse 1) and chose 'Create Record' from the drop down menu (see screenshot below, ellipse 2).

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3. Then, open the drop-down menu within the newly added step and chose 'MSCRM-ADDONS.com AutoMergeWorkingItems' (see next screenshot).



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4. Afterwards, click on 'Set Properties' (see screenshot, ellipse 1). A new window opens. Within this window, you can continue to appropriately configure the newly added step. Type in the name of the step (see screenshot below, ellipse 2), and select 'PrintDocument' as 'AutoMergeAction' (see screenshot, ellipse 3). Then, type in the name of the printer to be used in the 'PrintTo'-field within the 'Print Document'-section (see screenshot, ellipse 4). **IMPORTANT:** Before typing in the printer's name within this step, you have to ensure that the printer has been installed and added appropriately. Furthermore, it is crucial to use the same name as used during the printer-installation process. For more details, please see chapter 6.1.)

CProcess: New Workflow - Microsoft Dynamics CRM - Windows Internet Explorer						_ # ×
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5. Finish to configure the service-based printing step by adding the 'PrimaryRecordURL'. To do so, you have to select 'CreateDocument:OutputDocumentRef' from the first dropdown menu of the 'Look for'-area within the form assistant on the left (see screenshot, ellipse 1). Afterwards, select 'RecordURL(Dynamic)' from the drop-down menu below (see screenshot, ellipse 2). Then, click on 'Add' (see screenshot, ellipse 3) and on 'OK' (see screenshot, ellipse 4). Afterwards, the 'PrimaryRecordURL'-field is automatically filled (see screenshot, ellipse 5). Click on 'Save and Close'. Now you have appropriately added the service-based printing step.

NOTE: If there is already a printer name specified within the 'Print To'-field in the 'Create Document'-section, you have to delete this name to avoid double printing (see screenshot, ellipse 6).

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Exception 1: Adding the service-based printing step to already existing workflows

If you would like to add the service-based printing step to an existing workflow which includes a plug-in based printing step, you need to do the following:

Chose the workflow which you would like to modify and deactivate it. Then, double-click on it and open the 'CreateDocument'-step by clicking on 'Set Properties' (see next screenshot, ellipse 1). A new window will open. Within this window, delete the printername (see next screenshot, ellipse 2) and click on 'Save and Close'.



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After having deleted the plug-in based printer step, you can add the service-based printer step directly after the already existing 'Create Document'-step of the workflow. To do so, please follow the steps in the 'How to add the service-based printing step to a workflow'-section above.

Exception 2: Adding the service-based printing step to workflows including a 'Delete Document'-step

If you would like to add the service-based printing step to a workflow which includes a 'Delete Document'-step it is important to know that the service is only checking every 90 seconds if there are generated documents to be printed. In the worst case, documents are generated and deleted within this 90 seconds and the service is not able to print the documents, because they have been already deleted. To avoid this, it is important to include a 'Wait'-condition before the 'Delete Document'-step in your workflow. To do so, follow the steps below:

1. Click on 'Add Step' (see screenshot, ellipse 1) and chose 'Wait Condition' from the drop down menu (see next screenshot, ellipse 2).



Process: Account OverView - M	icrosoft Dynamics CRM -	Windows Internet Explorer						_ 0 X
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2. Click on 'condition (click to configure)' within the newly added wait condition (see screenshot, ellipse 1). A new window opens. Within this new window, you have to specify the wait condition. Chose 'Print Document (MSCRM-ADDONS.com

AutoMergeWorkingItem' from the first drop down menu, 'Status' from the second, 'Equals' from the third and 'Inactive' from the fourth drop down menu (see screenshot, ellipse 2). The condition now causes that generated documents are only deleted if they have been already printed. Afterwards click on 'Save and Close' to complete this workflow step (see screenshot, ellipse 3).

Save and Close	er (Standard) of elverniflow (ndl. espectid=16765303 FADF-1263-46FF-16027-6FA e 🎯 🏮 🔕 Activate 🖏 Show Dependencies 🛛 🔌 clions =		0 f
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7 Examples

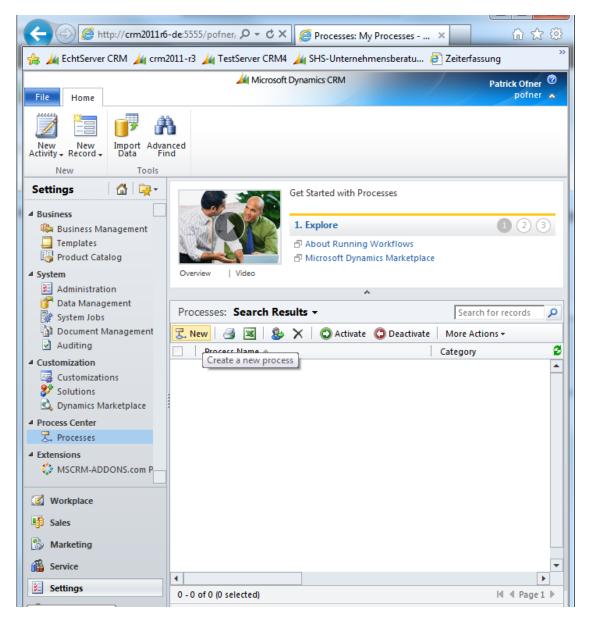
In this section you can find two AutoMerge examples.

7.1 Scenario 1: Workflow

In the first scenario we want to use AutoMerge to achieve the following: For each newly created contact we want to create a welcome letter and attach it to a CRM letter-activity. **This Scenario only works with On-Premise.**

INFO: This example workflow can be downloaded here: <u>http://mscrm-</u> addons.com/LinkClick.aspx?fileticket=Pdo9Ke3QM8A%3d&tabid=176&mid=830

To achieve this, we have to create a new workflow. Within CRM we navigate to "Settings" -> "Processes" and hit [New].





Thereupon, the following dialog will appear:

Proc	ess name: *	Generate and att	ach Welcome letter to letter acti	vity
Entit	ty: *	Contact	Category: *	Workflow
Туре	2:			
~	New blank process			
0	New process from an exis	ting template (select f	from list):	
	Template Name	•	Primary En	tity
			No process te	emplate records a
	0 - 0 of 0 (0 selected)			H ◀ Page 1 ►
	1			

We type in a name of the new process ("Generate and attach Welcome letter to letter activity"), select the "contact" entity and choose the "Workflow" category. Furthermore, we leave the default setting "New blank process".

We hit [OK] to proceed. Then the following window will open:



Process: Generate and attach We	lcome letter to letter activi	ty - Windows Inte	rnet Explorer	
File 🛃 🛃 Save and Close	🛃 🕕 🔘 Activate	📲 Show Depend	dencies 👈 <u>A</u> ct	ions →
Process: Generate and att	ach Welcome letter to le	t	Working on	solution: Default Solution
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	Add Step 🔻 🛛 🕂 🖬 In	nsert - 🗙 Delete	this step.	
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	AutoMergeWF	•	AttachToEmail	
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			CreateDocum	
Status: Draft			DeleteTempDo	ocument
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Due to the fact that we want to create a welcome letter for every new contact we have to choose "Record is created" as starting option.

Then we add a new "CreateDocument"-step to the workflow:



Process: Generate and attach We	lcome letter to lett <mark>er</mark> activ	rity - Windows Int	ernet Explorer	
File Save and Close	🛃 🛛 🖉 🔷 Activate	Show Depe	ndencies 👌 🗛	tions →
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	As an on-demai	nd process	Scope	User
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				Record status chai
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				Record fields char Select
				Record is deleted
	📑 Add Step ▾ 📑 🖬	insert 👻 🗙 Delet	e this step.	
	Generate welcom	me letter		
	AutoMergeWF:C	reateDocument	Set Properties	
Status: Draft				
				🔍 100% 🔻 🔡

We type in the name "Generate welcome letter" and hit [Set Properties] to define them. Thereupon, a new dialog will appear:

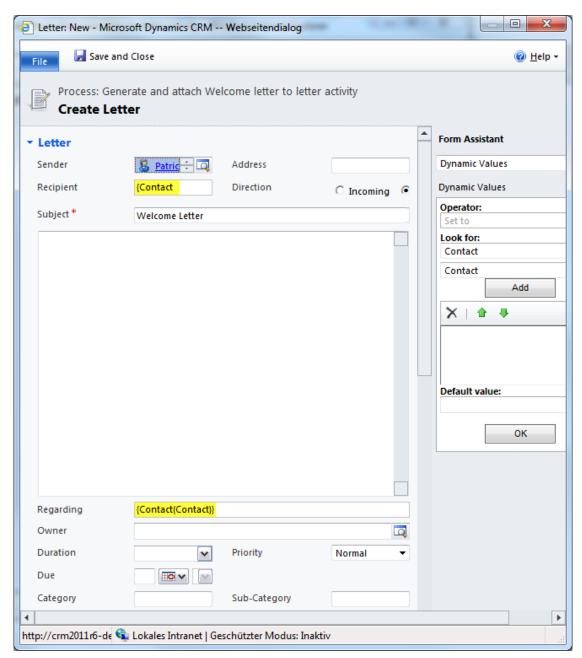
2	Set Custom Step Input F	Properties Webseitendial	og	X
F	ile 🗟 Save and Clo	se		
E	202	e and attach Welcome lett tep Input Properties		Working on solution: Default Solution
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٩	TemplateToExecute	Lookup	👌 WelcomeLetter.docx	
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ø	PrintTo	Single Line of Text		Set to
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- **DebugThisRequest**: We set this property to "False" because we do not need any log files.
- **TemplateToExecute**: Here, we select the "WelcomeLetter.docx" template.
- **SaveAs**: The generated document should be stored as .pdf. To achieve this, we have to fill in "pdf".
- **PrintTo**: we don't want to print the generated document. Therefore, we leave this field empty.
- **SaveOnlyIntoTemp**: We set this option box to "True", because first we only want to save the template locally and then we want it to be attached to the letter. There is no need to additionally save it on a file share or SharePoint.

Then we hit [Save and Close].

Next, we want to create a letter to which the generated document will be attached later. To achieve this, we add the standard workflow step "Create Record" to the workflow. We type in the name "Create Letter", choose "letter" in the drop down box and hit the "Set Properties"-button.





We selecte any user as sender.

The "Recipient" should be the newly created contact. This can be achieved by using the "Form Assistant" at the right side of the window: First, we place the cursor in the "Recipient" field. Then, we select the "Contact" entity and its "Contact" field. Afterwards, we hit [Add] and [Ok] to include it.

The "Regarding" field is set automatically.

We hit [Save and Close] to proceed.

Next, we have to attach the generated document to the created letter. This can be done by using the "AttachToLetter" request of the AutoMerge steps. We add this step, type in the name "Attach Document To Letter" and hit [Set Properties] again. Thereupon, the following dialog will appear:

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File Save and G	Close				
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http://crm2011r6-de 🕥	Lokales Intranet Geso	hützter Modus: Inaktiv		Create Letter (Lette Generate welcome Process	

Within this dialog, we define the values of the following properties:

- **DebugThisRequest**: We set this property to "False" because we do not need any log files.
- LetterToAttach: Here we have to refer to the before created letter. We do this by using the "Form Assistant" again. First, we set the cursor in the field of the property. Then, we select "Create Letter (Letter)" of the "Local Values" like shown in the screenshot above. Then, we hit [Add] and [OK].
- **DocumentGUID:** Here we have to refer to the document generated before. This can be achieved similarly to the "LetterToAttach" property. But in this case we select "Generate welcome letter:OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings)" and hit [Add] and [Ok].



Then, the dialog will look like this:

File Save and	i Close		@ <u>H</u> elp
	erate and attach We n Step Input Pro	lcome letter to lett operties	Working on solution: Default Solution
Property Name	Data Type	Value	Form Assistant
DebugThisRequest	Two Options	False C True	Dynamic Values
LetterToAttache	Lookup	{Letter(Create Letter (Letter))}	
	Lookup	{MSCRM-ADDONS.com User/Temp Set	
DocumentGUID			Operator:
DocumentGUID			

We complete our adjustment by pressing [Save and Close].

The final part of our workflow is to delete the temporary document again, because it is already attached to the letter and we don't need it any more.

For that, we add the "DeleteTempDocument" step at the end of the workflow. We type in the name "Delete Temp Document" and hit [Set Properties].

Then, the following window will open:

Set Custom Step Input Properties Webseitendialog	×
File Save and Close	@ <u>H</u> elp ▼
Process: Generate and attach Welcome letter to lette Set Custom Step Input Properties	Working on solution: Default Solution
Property Name Data Type Value	Form Assistant >
DebugThisRequest Two Options © False C True	Dynamic Values 👻
DocumentGUID Lookup (MSCRM-ADDONS.com User/Temp Setting	Dynamic Values
	Operator: Set to ▼ Look for: Generate welcome letter:Output ▼ MSCRM-ADDONS.com User/Tem ▼ Add X ▲ MSCRM-ADDONS.com User/Temp S Default value: OK
http://crm2011r6-de:5555/p 😪 Lokales Intranet Geschützter Modus: Inaktiv	



Here we only have to set two properties.

- **DebugThisRequest**: We set this property to "False" because we do not need any log files.
- **DocumentGUID:** Here we have to refer to the document generated before. To achieve this we do the following: Set the cursor into the value field. Then we select "Generate welcome letter:OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings)" from the "Form Assistant" and hit [Add] and [Ok].

Then, after all properties have been set correctly, we hit [Save and Close].

The finished workflow will look like this:

	elcome letter to letter activity - Windows Internet Explorer
	tach Welcome letter to letter Working on solution: Default Solution
 4 Common 중. Information ☑ Audit History 4 Processes ፩ Workflows 	General Administration Notes Hide Process Properties Process Name * Generate and attach Entity Contact Activate As Process Category Workflow Options for Automatic Processes Scope User Start when: Record is created Record fields change Select Record is deleted
	Add Step - ⊒ - Insert - X Delete this step.
	Generate welcome letter
	AutoMergeWF:CreateDocument Set Properties Create Letter
	Create: Letter Set Properties
	Attach Document To Letter
	AutoMergeWF:AttachToLetter Set Properties
	Delete Temp Document
	AutoMergeWF:DeleteTempDocument Set Properties
Status: Draft	
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After hitting [Activate] the workflow will be enabled and we can try it out.

To do this, we create a new contact and navigate to "Workflows". After a short duration we are able to find our configured workflow there (shown in the screeshot below).



Contact: Patrick Ofner - Microsof	t Dynamics CRM - Windows Internet Explorer	- 0 X
File Contact Add Cust	Microsoft Dynamics CRM	Patrick Ofner 🧐 pofner 🚕
Save & New Save & New Save & Save & Close Save & Save & Save & Save & Save & Close & Save & S	✓ Delete Add to Marketing Connect Assign Image: Connect Process Collaborate Collaborate Collaborate Image: Connect Connect	Run Report - Data
Information - General - Details	Contact Patrick Ofner E-mail Preferred Method of Owner	
Preferences	Contact 🐰 Pa Any	atrick Ofner
Related	Workflows: System Job Associated View -	h for records 🔎
 ✓ Common More Addresses ✓ Activities ✓ Closed Activities ✓ Sub-Contacts ✓ Relationships ✓ Connections ✓ Audit History ✓ Sales ✓ Opportunities ✓ Quotes ✓ Orders ✓ Invoices ✓ Service ✓ Contracts ✓ Contracts 	Image: System Job Name Status Reason Image: System Job Name Status Reason Image: System Job Name Succeeded Image: System Job Name Succeeded Image: System Job Name Succeeded	on Owner 🕏 Patrick Ofn
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Processes Workflows Dialog Sessions	1 - 1 of 1 (0 selected) All # A B C D E F G H I J K L M N O P Q R S T Status Active	I I I Page1 ► U V W X Y Z
		€ 100% ▼

Under "Activities", we can find the created letter:



Letter: Welcome Letter - Microso	oft Dynamics CRM - Windows Internet Explorer	
File Letter Customize	🚧 Microsoft Dynamics CRM	Patrick Ofner 🙆 pofner 🛆
Mark Complete Save Save & Inc Save	Uude Close Letter Actions	
Information Letter Notes Related Connections Audit History Processes Workflows	Letter Activities Welcome Letter Add a new note Add a new note Ittle: Note created on 3/26/2012 11:27 AM by Ed Patrick Ofner WelcomeLetter.pdf (25,983 Byte(s))	▼ ▲ ➡ ited 3/26/2012 11:27
Dialog Sessions	Activity Status Open	>
		🔍 100% 🔻 🔡

We open it and navigate to the "Notes"-section where we can find the attached welcome letter. We can open it by clicking on it. The letter will look like this:



James Elliott PTM EDV-Systeme GmbH Bahnhofgürtel 59 8020 Graz Austria

Dear Mr. Patrick Ofner,

PTM EDV-Systeme GmbH would like to welcome you as a new customer to our company. It is a great pleasure for us.

We like to let our customers know that they are very important and therefore it is crucial to us that our customers are 100% satisfied.

We are proud of the fact that we can offer our customers quick and competent services. If you have any problems or questions regarding our products, please do not hesitate to contact us.

We can be contacted in the following ways:

Phone: 0043 316 680 880 Email: <u>support@mscrm-addons.com</u>

Sincerely,

James Elliott Support staff

Now the letter is ready to send.



7.2 Scenario 2: Dialog

In this second scenario we want to use AutoMerge to achieve the following: After the user has chosen or opened a quote he should have the possibility to select a template for the merge process. Further on he should also be able to define the file extension of the generated document and if the document should be attached to an email or letter. If the user chooses attach it to a letter, he should have the possibility to define whether he wants to print the letter or not.

If the user chooses "attach to email" it should be sent automatically.

This scenario only works with On-Premise.

We put this into practise by using the AutoMerge functionality inside a CRM dialog.

INFO: This example dialog can be downloaded here: <u>http://mscrm-</u> addons.com/LinkClick.aspx?fileticket=UYKRsDlYho0%3d&tabid=176&mid=830

Within CRM, we navigate to "Settings" -> "Processes" and hit [New].

Process name: *	Generate Standar	d Quote	
intity: *	Quote	Category: *	Dialog
ype:			
New blank process			
New process from an e	xisting template (select f	rom list):	
Template Nam	e 🔺	Primary Er	tity
		No process t	emplate rec
		н	🖣 Page 1 🕨
0 - 0 of 0 (0 selected)			
0 - 0 of 0 (0 selected)			
0 - 0 of 0 (0 selected) Properties			

In the popped up window we type in a name of the process ("Generate Standard Quote"), select "Quote" as entity and choose the "Dialog" category. We hit [Ok] to continue.



The following window will open:

🤗 Process: Generate Standard Quote - Windows Internet Explorer					
File 🛃 🛃 Save and Close	글 ⑧ ۞ Activate 특별 Show Dependencies 🔥 <u>A</u> ctions →				
Process: Generate Standa	rd Quote Working on solution: Default Solution				
 ✓ Common S. Information Audit History ✓ Processes Dialog Sessions 	General Administration Notes ▼ Hide Process Properties Process Name * Generate Standarc Entity Quote Activate As Process Category Dialog Available to Run ✓ As an on-demand process □ As a child process ✓ As a child process □ □ □ ✓ Add Step ▼ □ □ □ ✓ Input Arguments Add ↓ □ ✓ Variables Add ↓ □				
	Select this row and click Add Step.				

7.2.1 Part 1: User Interaction

First, the user should be able to select a template from a pick list. Therefore, we add the "Query Crm Data"-step to our dialog. We define the name "Retrieve Standard Templates" and hit [Set Properties].



🕘 Define Query W	ebseitendialog	×			
File Save an	d Close	@ <u>H</u> elp ▼			
General Statement Label * Retrieve Standard Templates Query Details					
Edit Column	Design New Modify Query Variables				
	Look for: DocumentsCorePack Vise Saved View: [new]				
 → <u>Name</u> → <u>Entity Ty</u> 		andard Quote			
Select					
http://c 📬 Lokales In	tranet Geschützter Modus: Inaktiv				

We use the popped up window to define a query. It will retrieve all templates of the type "quote" starting with "Standard_Quote_" of the "DocumentsCorePack Templates"-entity. We hit [Save and Close] to proceed.

Next, we add a new page to the dialog and type in the name "Quote Templates". Underneath, we include a new "Prompt and Response" with the name "Which Template do you want?"



@ Process: Generate Standard	Quote - Windows Internet Explorer
File 🛃 🛃 Save and Clo	ose 🎯 🕕 🔘 Activate 🗟 Show Dependencies 🔥 <u>A</u> ctions - 🛛 🖗 <u>H</u> elp -
Process: Generate Sta	ndard Quote Working on solution: Default Solution
▲ Common	General Administration Notes
➡ Information ➡ Audit History	▼ Hide Process Properties
▲ Processes	Process Name * Generate Standarc Entity Quote
Dialog Sessions	Activate As Process Category Dialog
	Available to Run
	As an on-demand process
	As a child process
	Add Step ▼ ☐+□ Insert ▼ X Delete this step.
	Tinput Arguments
	Add
	▼ Variables
	Add
	* Steps
	Retrieve Standard Templates
	Query: Set Properties
	🐼 🕶 Page: Quote Templates
	🐼 💊 Which Template do you want
	Prompt and Response: Set Properties
Status: Draft	
	🔍 100% 🔻

To define its properties we hit [Set Properties]:



ile 🔜 Save ar	nd Close				@ <u>H</u> el
General				Form Assistant	
itatement Label *	Which Template do you want			Dynamic Values	
Prompt Details				Dynamic Values	
Prompt Text *	Please choose a template.			Operator: Set to Look for: Quote	
Tip Text				Bill To City Add	
Response Details	Option Set (picklisť, 💌	Log Response	€ Yes ⊂ No	Default value:	
Data Type	Text 💌	Default Value		ОК	
Provide Values	Define ValuesQuery CRM data			L	
Query Variables Separator Preview	Retrieve Standard 🔻	Columns	Name Created On		

We define "Please choose a template" as "Prompt Text" and set the "Response Type" to "Option Set (picklist)". We check "Query CRM data" then select "Retrieve Standard Templates" and use the "Name"-column.

We hit [Save and Close] to continue.

Next, we want to give the user the possibility to select the file extension of the generated document.

Because of that, we add a further "Page" to our dialog and name it "File Types". Same as above, we add a "Prompt and Response"-step to it. We name it "What file type do you want?".

🔞 🗸 Page:	File Types		
	🔞 🖕 What file type do you w	ant?	
	Prompt and Response:	Set Properties	

We click on [Set Properties] to set them up.



Define Prompt and Response Webseitendialog					×	
File Save and	d Close					
Prompt Text *	Please choose a file type				• <	
Tip Text						
Response Details						
Response Type	Option Set (pickli 🔻	Log Response	Yes	C No		
Data Type	Text 🔻	Default Value				
Provide Values	 Define Values Query CRM data 					
Response Values						
+ 3 + 4	A Z ↓ Z ↓	Value *	html			
docx pdf epub html		Label *	html		•	
http:// 🗣 Lokales Intra	net Geschützter Modus	: Inaktiv				

The "Prompt Text" should be "Please choose a file type." As "Response Type" we choose "Option Set (picklist)" again. But in this case we check "Define Value" and add "docx", "pdf", epub" and "html" as "Response Values". This can be achieved by clicking on the green cross.

We hit [Save and Close] to proceed.

The final part is to provide the user the possibility to select if he wants to attach the generated document to an email, to a letter or to a letter and print it out.

For that we add a further "Page" to the dialog and name it "Actions". Underneath, we add a "Prompt and Response"-step as well. We give it the name "What do you want to do with the document?".



🗿 🗕 Page: Actions
😵 💊 What do you want to do with the document?
Prompt and Response: Set Properties

We hit [Set Properties] to set them up.

Define Prompt and	Response Webseitendia	alog		->
File 🔣 Save an	d Close			@ <u>H</u> elp
Prompt Text *	Please choose an action.			•
Tip Text	8			
Response Details				_
Response Type	Option Set (picklist) 🔻	Log Response	Yes C No	
Data Type	Text 💌	Default Value		
Provide Values	 Define Values Query CRM data 			
Response Values				
🕂 🖹 🔶 🖣	Z↓ Z↓	Value *	AttachToLetterAndPrint	
AttachToEmail AttachToLetter		Label *	AttachToLetterAndPrint	
AttachToLetterAr	ndPrint			
tp://crm % Lokales	Intranet Geschützter Mod	us: Inaktiv		

We define "Please choose an action" as "Prompt Text" and select the "Response Type" "Options Set (picklist)". Then we check "Define Values" and add the following items by hitting the green cross to the list:

- **Name:** AttachToEmail
- **Name:** AttachToLetter
- **Name:** AttachToLetterAndPrint

Value: AttachToEmail Value: AttachToLetter Value: AttachToLetterAndPrint

We hit [Save and Close] to proceed.



7.2.2 Part 2: AutoMerge steps

Next, we add a "Check Condition"-step with the name "Print or not". We use it to decide if the document should only be generated or if it should be printed as well.

To define it, we click on the condition itself:

and the second second		×
		@ <u>H</u> elp →
		<
Equals	AttachToLetterAndPrint	
	Equals	Equals AttachToLetterAndPrint

We select the "What do you want to do with the document?" prompt and response, created before. Next, we choose its "Response Value" and define that it has to "Equals" "AttachToLetterAndPrint".

We complete the condition by clicking [Save and Close].

7.2.2.1 Part 2.1: Generate and print

If this condition is true we want to generate and print the document and attach it to a new letter. Therefore, we add the "GenerateDocument"-step of the AutoMerge functionalities to it underneath. We name it "Generate and print document" and hit [Set Properties].

2	Set Custom Step Inpu	t Properties Webse	itendialog	×	
	File Save and Close @ Help +				
Į	929	ite Standard Quote Step Input Prop	perties	Working on solution: Default Solution	
	Property Name	Data Type	Value	Form Assistant >	
ø	DebugThisRequest	Two Options	False C True	Dynamic Values 🔻	
ø	TemplateToExecute	Lookup	{DocumentsCorePack Template(Which Te		
ø	SaveAs	Single Line of Text	{Response Value{What file type do you w	Dynamic Values	
	PrintTo	Single Line of Text	\\tilsiter\HP LaserJet P2015 Series PCL 6	Set to T	
ø	SaveOnlyIntoTemp	Two Options	C False True	Look for:	
				Which Template do you want? ([▼ Primary Entity Quote Related Entities Created By (Delegate) (User) Created By (User) Currency (Currency) Modified By (Delegate) (User) Modified By (User) Opportunity (Opportunity) Owning Business Unit (Business Unit Owning User (User) Potential Customer (Contact) Price List (Price List) Source Campaign (Campaign) Local Values Which Template do you want? (Docu Retrieve Standard Templates	



This window allows us to define the following properties:

- **DebugThisRequest**: We set this property to "False" because we do not need any log files.
- **TemplateToExecute:** Here we have to refer to the template chosen from the user before. To achieve this, we put the cursor into the field and use the "Form Assistant" on the right side of the window. We select the "Which Template do you want? (DocumentsCorePack Template)"- prompt and response as shown in the screenshot above. Then we select "DocumentsCorePack Template" hit [Add] and [Ok].
- **SaveAs:** Here we have to refer to the selected file type. This works the same way as for the property above, except that we select "What file type do you want?" and "Response Value".
- **PrintTo:** We are using this property to define the path of a network printer. In this case "\\tilsiter\HP LaserJet P2015 Series PCL 6".
- **SaveOnlyIntoTemp:** We set this property to "True".

We hit [Save and Close] to proceed.

Underneath, we add a "Create Record"-step. We select "letter", name it "Create letter1" and define its properties:

Etter: New - Micro	osoft Dynamics CRM Web	oseitendialog		_		
File 🚽 Save an	d Close					@ <u>H</u> elp ▼
Process: Gen Create Let	erate Standard Quote ter					
▼ Letter					-	Form Assistant >
Sender	Q	Address				Dynamic Values 🔻
Recipient		Direction	C Incoming	Out		Dynamic Values
Subject *	Quotationletter of <mark>{Name</mark>	e(Quote)}				Operator:
						Look for:
						Quote
						Add
						X 1 +
Regarding	{Quote(Quote)}					Name(Quote)
Owner						
Duration	~	Priority	Normal	•		
Due						Default value:
Category		Sub-Category				ОК
					-	
http://crm2011r6-de:5	555/pofner/SFA/W ६ Loka	ales Intranet Geschüt	zter Modus: Inaktiv	,		

We define its "Subject" using the "Form Assistant". The "Regarding"-field is set automatically. We hit [Save and Close] to continue.

Afterwards, we have to attach the before generated document to this letter. Therefore, we add an "AttachToLetter"-step, name it "Attach letter1" and define the properties as shown underneath:



Set Custom Step Input Properties Webseitendialog				
File Save and Close				
Process: Generate Stand	•	Working on solution: Default Solution		
Property Name Data Ty	pe Value	Form Assistant >		
🔊 DebugThisRequest 🛛 Two Op	otions 🖲 False 🔿 True	Dynamic Values 👻		
🔊 LetterToAttache Lookup	{Letter(Create letter1 (Letter))}	Dynamic Values		
DocumentGUID Lookup	MSCRM-ADDONS.com User/Temp Se	Operator: Set to Look for: Create letter1 (Letter) Primary Entity Quote Related Entities Created By (Delegate) (User) Created By (User) Currency (Currency) Modified By (Delegate) (User) Modified By (Delegate) (User) Modified By (Delegate) (User) Modified By (Delegate) (User) Modified By (User) Opportunity (Opportunity) Owning Business Unit (Business Uni Owning User (User) Potential Customer (Account) Potential Customer (Account) Potential Customer (Contact) Price List (Price List) Source Campaign (Campaign) Local Values Create letter1 (Letter) Which Template do you want? (Docu Generate a Create letter1 (Letter) What do you want to do with the do Process		
http://crm2011r6-de:5 🗣 Lokales Intranet Geschützter Modus: Inaktiv				

Properties:

- **DebugThisRequest**: We set this property to "False" because we do not need any log files.
- LetterToAttach: We refer to the before created letter using the "Form Assistant" ("Create letter1 (Letter)" and "Letter")
- DocumentGUID: Here we have to link to the generated document. We use the "Form Assistant" again and select "Generate and print document: OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings)" and "MSCRM-ADDONS.com User/Temp Settings".

We save and close the window.

At the end of this condition branch we have to delete the generated document stored in the "MSCRM-ADDONS.com User/Temp"-entity.

To achieve this, we add the "DeleteTempDocument"-step, give it the name "Remove document1" and define its properties as follows:



Set Custom Step Input Properties Webseitendialog	×		
File Save and Close			
Process: Generate Standard Quote Set Custom Step Input Properties	Working on solution: Default Solution		
Property Name Data Type Value	Form Assistant >		
DebugThisRequest Two Options False True DocumentGUID Lookup MSCRM-ADDONS.com Use	Dynamic Values Dynamic Values Dynamic Values Operator: Set to Look for: Generate and print documer MSCRM-ADDONS.com User/1		
http://crm2 👊 Lokales Intranet Geschützter Modus: Inaktiv			

We use the "DocumentGUID"-property to refer to the generated document. For that, we select "Generate and print document: OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings)" and "MSCRM-ADDONS.com User/Temp Settings".

7.2.2.2 Part 2.2: Generate only

Next, we have to focus the else branch of the condition. It will be executed if the user has selected "AttachToEmail" or "AttachToLetter".

First, we have to add the "Default Action"-step (else branch) to create the if condition.

Then, we add a new "CreateDocument"-step with the name "Generate document only" to the else branch. We define the properties same as in the if branch before, except that we leave the "PrintTo"-property empty because we only want to create the document.

Next, we have to add a further condition to this else branch. If the user has chosen "AttachToEmail" we have to use an email, otherwise ("AttachToLetter") we have to use a letter.

This can be done by adding a new "Check Condition"-step to the dialog. We name it "Email or Letter" and define it as follows:

Specify Condition Webseitendialog	-	 Compare 	×	
File Save and Close			@ <u>H</u> elp →	
1 Clear				
 What do you want to do w Response Value 	Equals	AttachToEmail		
Select				
http://crm2011r6-de:5555/pofner/Condit 😪 Lokales Intranet Geschützter Modus: Inaktiv				

If the value of "What do you want to do with the document?" is "AttachToEmail" the condition is true, otherwise false.



7.2.2.3 Part 2.2.1: Attach to Email

In the true branch of this condition we create an email by using the "Create Record"step. We type in the name "Create Email" and define it as shown underneath:

E-mail: New - Microsoft Dynamics CRM Webseitendialog				
File 🛃 Save	e and Close	@!	Help +	
Process: C Create I	Generate Standard Quote E- mail			
▼ E-mail		Form Assistant	>	
From	8 Patrick Ofner	Dynamic Values	•	
То	{Potential Customer(Quote)}	Dynamic Values		
Cc		Operator:		
Bcc		Look for:		
Subject		Quote	-	
Regarding	{Quote(Quote)}	Created By	-	

We use any user as sender and the "Potential Customer" as recipient. The "Regarding"-field is set by default.

The next step is to attach the created document to this email. This can be achieved by using the "AttachToEmail" step. We name it "Attach to Email" and adjust its properties.

Set Custom Step Input Properti	ies Webseitendialog	x
File Save and Close		
Process: Generate Stand Set Custom Step In		Working on solution: Default Solution
Property Name Data Ty	ype Value	Form Assistant >
🔊 DebugThisRequest 🛛 Two O	ptions 🔎 False 🔿 True	Dynamic Values 👻
🔊 EmailToAttache Looku	p {E-mail Message(Create (E-mail))}	
DocumentGUID Looku	p {MSCRM-ADDONS.com User/Temp Setti	
		Operator:
		Look for:
		Generate document only:Outpur 👻
		Primary Entity Quote Related Entities Created By (Delegate) (User) Currency (Currency) Modified By (Delegate) (User) Modified By (Delegate) (User) Modified By (Delegate) (User) Modified By (User) Opportunity (Opportunity) Owning Business Unit (Business Unit (Business Unit (Business Unit (Business Unit (Deter)) Owning User (User) Potential Customer (Account) Potential Customer (Contact) Price List (Price List) Source Campaign (Campaign) Local Values Create letter1 (Letter) Attach letter1:OutputLetter (Letter) Remove document1

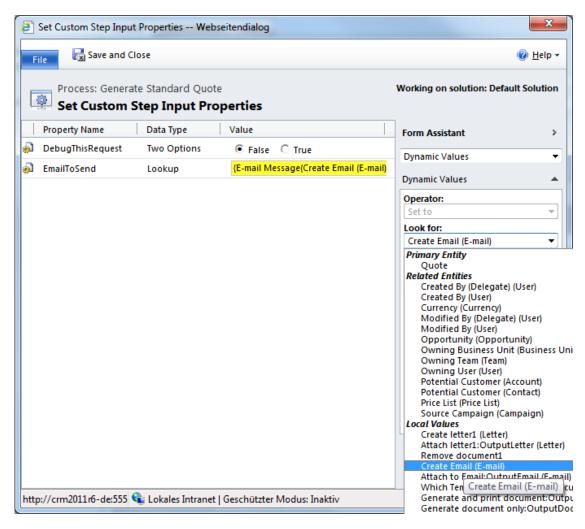


Properties:

- DebugThisRequest: We set this property to "False" because we do not need any log files.
- LetterToAttach: We refer to the before created email using the "Form Assistant" ("Create (Email)" and "E-mail Message").
- **DocumentGUID:** Here we have to link to the generated document. We use the "Form Assistant" again and select "Generate document only: OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings)" and "MSCRM-ADDONS.com User/Temp Settings".

Important: If the file type of the generated document is "html" this step will copy its content into the email body. Otherwise, the generated document will be added as attachment to the email.

At this time, the email is ready for sending. We'll use the "SendEmail"-step to do this. We name it "Send Email" and define its properties like this:



Properties:

- DebugThisRequest: We set this property to "False" because we do not need any log files.
- **EmailToSend:** We refer to the before created email using the "Form Assistant" ("Create (Email)" and "E-mail Message").



7.2.2.4 Part 2.2.2: Attach to Letter

Now we have finished the if branch and focus the otherwise way. It will be executed if the user has chosen "AttachToLetter". Here we want to create a letter and attach the generated document to it.

To do this we have to add the "Default Action"-step (else branch) to this condition.

To this else branch we add the following two steps:

"Create Record"-step of the entity "Letter" with the name "Create letter2". We define its properties as shown underneath:

Letter: New - Micros	oft Dynamics CRM W	ebseitendialog	A	
File 🚽 Save and	Close			
Process: Gener	rate Standard Quote er			
▼ Letter				
Sender	Q	Address		
Recipient	{Potential Customer	Direction	C Incoming	ο οι
Subject *	Quotation Letter of {Na	me(Quote)}		
I				
Regarding	{Quote(Quote)}			

And we add the "AttachToLetter"-step with the name "Attach to letter2" to it. We define its properties as follows (same as in the first "AttachToLetter"-step, except that we select "Create letter2 (Letter)" for "LetterToAttach" and "Generate document only): OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings)" for "DocumentGUID"):

File Save and Cl	ose	@ <u>H</u> elp
959	te Standard Quote Step Input Pro	
Property Name	Data Type	Value
-	Two Options	False O True
DebugThisRequest	nito options	o ruse o ruc
DebugThisRequest	Lookup	{Letter(Create letter2 (Letter))}

At this point the document is created and attached to an email or a letter. At the end, we can delete the temporary document again.



Therefore, we add the "DeleteTempDocument"-step outside of the if condition to our dialog. The reason for that is that we want to delete the document in any case ("AttachToEmail" or "AttachToLetter"). We name it "Remove document 2" and define its properties as shown below:

Set Custom Step Input Pro	perties Webseit	endialog	×
File Save and Close			@ <u>H</u> elp →
Process: Generate St	~	erties	Working on solution: Default Solution
Property Name D	ata Type	Value	Form Assistant >
DebugThisRequest Ty	wo Options	• False	Dynamic Values 🔻
DocumentGUID Lo	ookup	{MSCRM-ADDONS.com User/Temp Se	Dynamic Values
http://crm2011r6-de:5555 😪 1	okales Intranet I G	eschützter Modus: Inaktiv	Operator: Set to ▼ Look for: Generate document only:Outpur ▼ MSCRM-ADDONS.com User/Tem ▼ Add X ▲ ♥ MSCRM-ADDONS.com User/Temp Si Default value: OK

Properties:

- **DebugThisRequest**: We set this property to "False" because we do not need any log files.
- DocumentGUID: Here we have to link to the generated document. We use the "Form Assistant" again and select "Generate document only: OutputDocumentRef (MSCRM-ADDONS.com User/Temp Settings)" and "MSCRM-ADDONS.com User/Temp Settings".

Now we are finished.

After the dialog has been activated, it can be used.



7.2.3 Result dialog

Query: Set Properties *Page: Query: Set Properties *Vhich Templated by you want? Part 1: User *Page: File Types: Prompt and Response: Set Properties *Prompt in Please choose a template. Prompt and Response: Name Prompt and Response: Set Properties *Page: File Types: *Vhat file type do you want? Prompt and Response: Set Properties *Page: Automation of the document? Prompt and Response: Set Properties Part 2: AutoMerge steps: *Page: AutoMerget/*CreateDocument Set Properties Part 2: AutoMerget steps: * Undat do you want to do with the document? Page: AutoMerget/*CreateDocument Part 2.1: Generate and print document * Generate and print document AutoMerget/*CreateDocument Set Properties Part 2.2: Generate and print document * Create Itten! * Eterporties * Otherwise: Part 2.2: Generate and print document? Part 2.2: Generate and print document * AutoMerget/*/EcteatDocument Set Properties Part 2.2: Generate and print document? Part 2.2: Generate and print document? * Create Itten! * Eterporties Part 2.2: Generate and print document? Part 2.2: Generate and print document? Part 2.2: Generate and print doc	Retrieve Standard Templates	
• Which Template do you want? Prompt and Response Set Properties Prompt Press choose a template. Prompt Press choose a file type. Prompt	Query: Set Properties	
Prompt and Response: Set Properties Prompt and Response: Name * Page: File Types * What file type do you want? Prompt and Response: Set Properties Prompt	▼Page: Quote Templates	
Prompt and Response: Set Properties Prompt: Please choose a template. Prompt: Mile type do you want? Prompt: Mile type do you want? Prompt: Affect of the type do you want? Prompt: Mile type: Prompt: Prompt: Prompt: Mile type: Prompt: Prompt: Promp	Which Template do you want?	Daut 1. Llaan
Prompt: Please choose a template. *Page: File Types *Unit file Type do you want? Prompt and Response: Set Properties Prompt: Please choose a file Type. Response: doce pd do them *Page: Actions *Unit do you want to do with the document? Prompt and Response: Set Properties Prompt: Please choose an action. Response: AttachToLetter Prompt and Response: Set Properties Prompt: Please choose an action. Response: AttachToLetter * AttachToLetter * Generate and print document Create letter * Generate and print document * Set Properties * Create letter * Generate document only AutoMergeVF-AttachToLetter Set Properties * Remove document * Create letter * Generate document only AutoMergeVF-CreateDocument Set Properties * Email or Letter * Create letter * Set Properties * Create letter * Create letter * Set Properties * Create letter * Create letter * Set Properties * Create letter * Create letter * Set Properties * Create letter * Create letter * Set Properties * Create letter * Create letter * Set Properties * Create letter * Create letter * Set Properties * Create letter * Create letter * Set Properties * Create letter * Create letter * Set Properties * Create letter * Create letter * Set Properties * Create letter * Create letter * Set Properties * Create letter * Create letter * Set Properties * Create letter * Cr	Set Properties	
Page: File Types	Prompt: Please choose a template.	Interaction
What file type do you want? Prompt and Response: Set Properties Prompt: Please choose a file type: Response: docs a file type: Part 2: Attachio Prompt: and Response: Set Properties Prompt: Prompt: Response: Set Properties Prompt: Press choose an action. Response: Attachio Response: Attachio Part 2: AutoMergever. Part 1000000000000000000000000000000000000		
Prompt and Response: Set Properties Prompt: Please choose a file type. Response: dock e pub html *Page: Actions * What do you want to do with the document? Prompt and Response: Set Properties Prompt: Please choose an action. Response: AttachTolemail AttachToletter: * Print or not # What do you want to do with the document?. Prompt: matchToletterAndPrint * Print or not # What do you want to do with the document?. Part 2: AutoMergeWE. * Create letter: * Create letter: * Create letter: * Create letter: * Attach letter. * Attach to Email * Create Email * Set Properties * Create letter. * Create Email * Set Properties * Attach to Email * Create Iter. * Create Email * Set Properties * Attach to Email * Create Iter. *		
Prompt: Plass choose a file type. Response: dood epub html *Page: Actions * What do you want to do with the document? Prompt: Plass choose an action. Response: dood an action. Response: dood an action. Response: AttachToLetter AttachToLetter AttachToLetter AttachToLetter AttachToLetter AttachToLetter AttachToLetter AttachToLetter AttachToLetter Set Properties * Generate and print document Set Properties * Create letter1 AutoMergeVF:CreateDocument Set Properties * Create letter1 AutoMergeVF:CreateDocument Set Properties * Remove document1 AutoMergeVF:CreateDocument Set Properties * Email or Letter * Set Properties * Email or Letter * Set Properties * Email or Letter * Set Properties * Create Etter1 Create: Enter * Set Properties * Email or Letter * Set Properties * Email or Letter * Set Properties * Create Etter2 Create Etter3 Create Etter2 Create Etter3 Create Etter2 Create Etter3 Create Etter2 Create Etter3 Create Ett	What file type do you want?	
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7.2.4 Test Dialog

To start our dialog, we open a quote and hit "Start Dialog".

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 Other Contacts Activities Closed Activities Connections Documents Audit History 	Totals Detail Amount €1,100.00 Quote Discount (%)		
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Thereupon, we choose our dialog and hit [Ok]:

Look Up Record Webseitendialog	×
	to find matching records. Filter your results and view different s. Then, select the record you want and click OK.
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View: On Demand Dialogs	•
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Then we can define what should happen with the generated document. We select "AttachToEmail" and hit [Next] to proceed.

Generate Standard Quote - Windows Internet Explorer	
Generate Standard Quote	
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After a short time, this window will pop up and let us know that the dialog has ended. We hit [Finish] to close it.

Then, we navigate to the "Closed Activities"-area of this quote. There we can find the Email:



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In the "Attachment"-area we can see the generated document stored as pdf.

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Demo-Company Inc., 1234-Demo Road



PTM EDV-Systeme To: Mr. James Elliott Bahnhofgürtel 59, Graz8020 - Austria

DearMr.James Elliott,

Thanks for the interest in our products. Regarding your request per e-mail from 3/30/2012, we can offer you the following:

No.	Product Name	Price	Qty.	Amount
Default Subject				
5454654 6546	Documents Core Pack CRM 2011	€56.00	20	€1,120.00
		Group Default Subject total		1.120,00€

Total:€1,120.00

This quote is valid for XX days from today.

Terms and conditions conditions:

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Payment conditions:

Normally you have to buy at our online-shop and to pay in advance with Paypal, MasterCard, VisaCard or American Express. If you prefer to pay by bank transfer, this is also possible, but we cannot forward the software-activation-key until the payment arrives in our account



8 How to activate debugging for AutoMerge

This article describes how to activate debugging for AutoMerge for Microsoft Dynamics CRM 2011. Basically, there are two possibilities to enable debugging.

- **Solution 1:** Activate file debugging by using the AutoMerge configuration (Recommended).
- **Solution 2:** Activate debugging by using the AutoMerge configuration.

Solution 1

Navigate to "Settings" -> "Solutions" and click "AutoMergeServerCore".

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💐 Dynamics Marketplace	□ 🌮	TelephoneIntegrationSer	TelephoneIntegrationSer	1.1	
▲ CRM Tools	□ 🌮	PowerSearchConfig	PowerSearchConfig	1.47	
🔝 Metadata Browser	□ 🌮	AttachmentExtractorCore	AttachmentExtractorCore	5.11	
▲ Unknown88	□ 🌮	chatActivity	chatActivity	1.0.0.0	
🛃 Processes	□ 🌮	PTMTab_BuildRequest	PTMTab_BuildRequest	1.0	
	□ 🌮	RibbonWorkbench	Ribbon Workbench	1.0.1.3	
	□ 🌮	BuildRequestButtons	BuildRequestButtons	1.0.0	
Workplace	□ 🌮	BuildRequestEntity	BuildRequestEntity	1.0.0.0	
😼 Sales	□ 🌮	AutoMergeServer	MSCRM-ADDONS.com Au	5.2	
S Marketing	□ 🌮	RibbonEditor	RibbonEditor	1.0	
-	□ 🌮	TimeAttendant	TimeAttendant	1.0	
i Service	□ 🌮	ExecuteFetchXML	Execute FetchXML	1.0.0.0	
🧯 TimeAttendant	□ 🌮	GroupCalendarServerCon	MSCRM-ADDONS.com Gr	1.2	
Settings	- 9	DecordCounterServerCore	MSCRM ADDONS com Re	21.0	
- Settings	1-44	of 44 (1 selected)			

In the AutoMerge Config check "Active Debugging" and "Active File Debugging". Click "Save" to finish.



Auto	lerge Config Version 5	5.24 mscrm-addons.com
General	About AutoMerge Licensing	
	Active Debugging	v
	Active File Debugging	
	SPS User	user1
	SPS Password	
	SPS Domain	domain
	SP Webservice Url	http://dynamics01.contoso.com/AdventureWorksi
	CRM User Name	user2
	CRM User Password	
	CRM User Domain	test
	Is IFD	
	ADFS Url (https://sts1.contoso.com)	adfsURI
	IFD Auth Endpoint (https://auth.contoso.com)	ifd endpoint
		Save

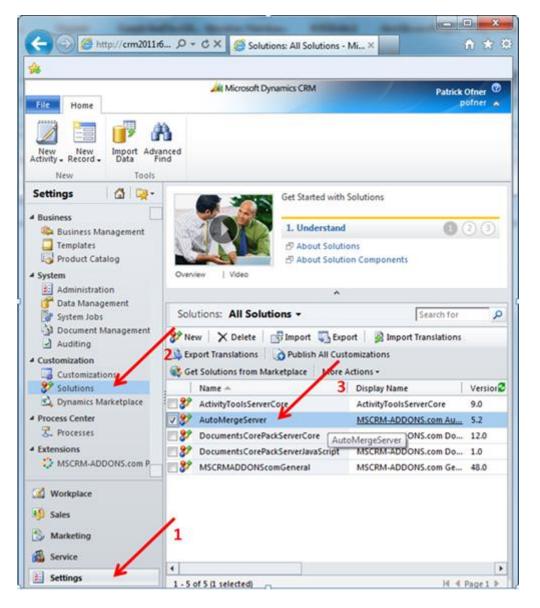
File-debugging is now active and the logfiles will be saved in the "log"-folder in your AutoMerge installation-folder.

Navigate to the installation-path of AutoMerge and send the files in the "log"-folder with an error description to our support address (support@mscrm-addons.com). Example: C:\Program Files (x86)\PTM EDV-Systeme GmbH\AutoMerge for Microsoft CRM 2011\log



Solution 2

Within your CRM, navigate to "Settings" [1] -> "Solutions" [2] and double-click on the "AutoMergeServer"-solution [3]. (see next screenshot)





After that, the configuration page of AutoMerge opens. (see screenshot below)

General	About AutoMerge Licensing	1.
	Active Debugging	× ×
	SPS User	potner
	SPS Password	
	SPS Domain	domain
	SP Webservice Url	http://crm2011r6-de-5555/poin AppWebServicet
		1.
		Save 🖌

Check "Activate Debugging" [1] and click on "Save" [2]. From now on, debugging is activated.



9 Contact

If you have got problems with this product, please consult our Knowledge-Base at http://support.mscrm-addons.com ,

Or contact us via:

Email: <u>support@mscrm-addons.com</u> Tel.-Nr.: +43 316 680 880 0