DocumentsCorePack Client for Microsoft CRM 2015/2016 and Dynamics 365

v.0.2, January 2018

DocumentsCorePack Client
(How to work with DocumentsCorePack Client for Microsoft CRM 2015/2016 and Dynamics 365)

CONTENT

Preamble

This guide gives detailed explanations of all functionalities provided by DocumentsCorePack Client for Microsoft CRM 2015/2016 and Dynamics 365. It aims to describe the main settings, including step-by-step descriptions of how to work with the DCP Client.

This guide does not contain any information on how to create templates with DocumentsCorePack Template Designer. Please find all the information on how to design templates in the Template Designer documentation on our website.

Target Audience

This guide is intended for users processing documents with DocumentsCorePack Client who have the following minimum skills:

- Basic Microsoft Dynamics 365 knowledge
- Maintaining and configuring a Microsoft Dynamics 365 Organization

Supported Web Browsers and versions

Supported Web Browsers:

- Internet Explorer 10 and higher
- Chrome
- Edge
- Firefox

One of the following versions of Microsoft Dynamics CRM must be available:

- Microsoft Dynamics CRM Server 2015/2016
- Microsoft Dynamics 365

Purpose of DocumentsCorePack Client?

DocumentsCorePack facilitates – among other things – the generation of documents in Microsoft Dynamics 365. This enables users to edit once created documents before they are sent or saved back to Dynamics 365 using the Microsoft Word integrated www.mscrm-addons.com – tab.

Once generated, documents can be opened and modified very easily thanks to DCP Client. All Microsoft Word formatting options are supported. Besides, the DCP Client can as well be used offline with any restrictions. Many other features, like the bulk merge functionality, support the user when using the tool, that is fully integrated into MS Office.

1 DocumentsCorePack Client Basics

This chapter includes all the basic information regarding DocumentsCorePack. It gives you a profound overview of how to work with DocumentsCorePack Client.

1.1 The www.mscrm-addons.com tab

DocumentsCorePack Client is directly integrated into Microsoft Word via an additional tab in the MS Word ribbon.

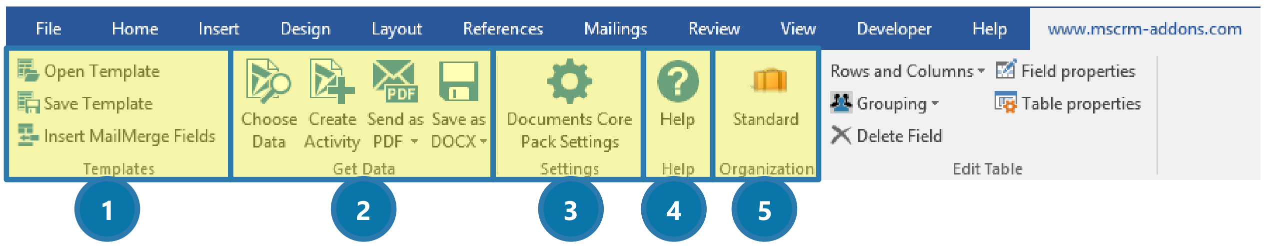


Figure 1 www.mscrm-addons.com-tab in Microsoft Word

The tab is separated into a few sections. Please find a brief introduction to the various functionalities of the single sections below:

❶ Templates

The *Templates*-block provides the option to open and save templates, or to insert mail merge fields. Basically, it contains everything needed to edit a new or an already existing template. For more information on the creation of templates, please have a look at our Template Designer documentation on our website.

❷ Get Data

In the *Get Data*-block, you can merge your created template directly within the ribbon. Click on the ***[Choose Data]***-button to select certain Dynamics 365 data, create an activity in Dynamics 365 using the ***[Create Activity]***-button and use the ***[Send as...]***-button or the ***[Save as]***-button to process the document according to the buttons' name.

❸ Settings

The *DocumentsCorePack Settings*-block provides you with the possibility to specify all Client-side settings.

❹ Help

This block provides you with help if necessary.

❺ Organization

This block shows your organization name.

1.2 Main features of DocumentsCorePack (DCP) Client

Document generation

This functionality enables the creation of Word-documents with data from Dynamics 365 using templates. It is capable to resolve any relationship and works with custom, as well as standard Dynamics 365 entities. Therefore, DocumentsCorePack Client provides the opportunity to e.g. create quotes or invoices including data from related records like *other contacts, accounts, products* etc.

Template Management

The template management provides various features, such as the possibility to easily rename, save or relocate templates.

Send and Save capability

Users have the possibility to save a document directly to the proper location in Dynamics 365 without the need of generating an activity thanks to the "Save as …"-functionality. The generated documents are converted into the listed file formats and could be directly sent to customers or partners.

Therefore, DocumentsCorePack provides a powerful option to simplify accounting by handling invoices, quotes, orders, etc. more easily.

Bulk merge functionality for DocX templates

With the bulk merge functionality, DCP offers further advantageous features for handling DocX templates. This new functionality enables users to create a large number of documents all at once using data from Dynamics 365. It provides several possibilities for the document generation, such as:

- combining all generated documents into one single document whilst maintaining the page numbering
- storing all generated documents in one folder
- sending the documents to a printer
- creating activities with the generated documents as attachments

1.3 Dependencies between DCP ServerBased and DCP Client Based

DocumentsCorePack ServerBased and DocumentsCorePack ClientBased are separated mscrm-addon.com products that work together very closely.

DocumentsCorePack Client is a standalone software to design complex templates and merge them to documents directly in MS Office Word. The DocumentsCorePack Client is a Word Add-in, also known as the TemplateDesigner.

The easy, intuitive and powerful handling of the TemplateDesigner extends the capabilities of MS Word with an interface to Microsoft Dynamics 365. Next, to the simple mapping of Dynamics 365 fields, it provides a lot of additional features to ensure that our tool is capable to cover your needs. It has predefined fields, so-called Mail Merge Fields.

DocumentsCorePack ServerBased is a service to merge templates fully automated using Dynamics 365 workflows and dialogs. As DCP ServerBased does not have the capability to help you design, templates the DocumentsCorePack Client does it.

For a more detailed view of each product, please have a look at the DocumentsCorePack ServerBased documentation and the DocumentsCorePack TemplateDesigner documentation.

1.4 Demo Templates

Demo Templates provide the opportunity to start directly with DCP and you don't have to design an own Template to test the full functionality of DocumentsCorePack.

After selecting a template, you have the possibility to discover the wide Range of DCP templates. After the installation of DCP-Client, we offer a wide variety of templates.

If you use the Microsoft CRM 2015/2016 or the Microsoft Dynamics 365 SAMPLE DATA, not every demo-template will show the correct result. In the next sub-chapters, we provide you with an overview that includes all necessary requirements, and an exemplary use for each template.

1.4.1 Account Templates

Account Reconnect
Which data must your Dynamics 365 contain to get a pretty result?
The sample data is just fine
What does the template do?
It is a simple account template with fields from the account entity

Account Overview
Which data must your Dynamics 365 contain to get a pretty result?
The sample data plus data from each additional entity
What does the template do?
It is a simple account template with tables that contain data from the extra entities

Contemporary Letter
Which data must your Dynamics 365 contain to get a pretty result?
Usually, the sample data is enough.
What does the template do?
The template creates a letterhead, including the company and its address.

List of accounts related to this account
Which data must your Dynamics 365 contain to get a pretty result?
The selected (sample data) account must contain other related accounts.
What does the template do?
The template shows all accounts related to the selected account

List of Contacts related to this Account
Which data must your Dynamics 365 contain to get a pretty result?
The selected (sample data) account must contain other related contacts.
What does the template do?
The template shows all contacts from the selected account

Account QR Code
Which data must your Dynamics 365 contain to get a pretty result?
Usually, the sample data is enough.
What does the template do?
Shows how to use the QR-Code field with the account entity

1.4.2 Contact Templates

Contact Overview
Which data must your Dynamics 365 contain to get a pretty result?
The sample data and data from each additional entity
What does the template do?
Simple activity template with tables that contain data from the additional entities

Contact Reconnect - Gift Certificate
Which data must your Dynamics 365 contain to get a pretty result?
The sample data is just fine
What does the template do?
Simple activity template with fields from the activity entity only

List of Accounts related to this Contact
Which data must your Dynamics 365 contain to get a pretty result?
The selected contact must contain other related accounts
What does the template do?
The template shows all accounts related to the selected contact

List of Contacts related to this Contact
Which data must your Dynamics 365 contain to get a pretty result?
The selected contact must contain other related contacts
What does the template do?
The template shows all contacts related to the selected contact

1.4.3 Quote Templates

Quote Base
Which data must your Dynamics 365 contain to get a pretty result?
You must have at least one quote
What does the template do?
It is a simple quote template that contains fields from a quote entity

Quote with Grouping Base
Which data must your Dynamics 365 contain to get a pretty result?
You must have at least one quote, products and prices
What does the template do?
It is a simple quote template

Quote QR Template
Which data must your Dynamics 365 contain to get a pretty result?
You must have at least one quote, products and prices
What does the template do?
Shows how to use the QR-Code field with the quote entity

1.4.4 Invoice templates

Invoice Base
Which data must your Dynamics 365 contain to get a pretty result?
The sample data is just fine
What does the template do?
It is a simple invoice template that contains fields from the invoice entity

Invoice with Grouping Base
Which data must your Dynamics 365 contain to get a pretty result?
The sample data is just fine
What does the template do?
It is a simple invoice template

1.4.5 Marketing list templates

Newsletter to all accounts of a marketing list
Which data must your Dynamics 365 contain to get a pretty result?
You must have a marketing list with at least one account included
What does the template do?
This template generates one document for each account of the marketing list

Newsletter to all contacts of a marketing list
Which data must your Dynamics 365 contain to get a pretty result?
You must have a marketing list with at least one contact included
What does the template do?
The template generates a document for each contact of the marketing list

1.4.6 Opportunity templates

Opportunity Base
Which data must your Dynamics 365 contain to get a pretty result?
The sample data is just fine
What does the template do?
It is a simple sample template for an opportunity letter

1.5 Single merges

A single merge provides the opportunity to merge a previously created template with 1 data record and further process it by creating an activity, by saving it or by sending it.

It is very important to know if you wish to create a single- or a bulk merge before you merge the document. If you decide to single merge your document, please have a look at CHAPTER 3.1, HOW TO GENERATE A DOCUMENT (SINGLE MERGE) OUT OF DYNAMICS 365 ON PAGE 35 if you would like to merge it out of Dynamics 365 or at CHAPTER 3.1, HOW TO GENERATE A DOCUMENT (SINGLE MERGE) OUT OF MS WORD ON PAGE 37 if you would like to merge it out of Microsoft Word.

1.6 Bulk merges

A bulk merge provides the opportunity to merge a previously created template with many data records.

The basic features provided by DCP regarding mailmerge-procedures with multiple records include:

1) Create letters for multiple records (e.g. contacts) (please have a look at CHAPTER 3.6, HOW TO CREATE LETTERS USING BULK MERGE ON PAGE 48 for further information)

2) Using saved views to choose data (please have a look at CHAPTER 3.2.3, STEP 2A: SELECT DATA – ADVANCED FIND (OPTIONAL) ON PAGE 42 for further information)

3) Create label templates (please have a look at the TemplateDesigner documentation on our website for more information)

1.7 After the single merge

This chapter provides you with further information on how to process templates after the merge. There are three main functions:

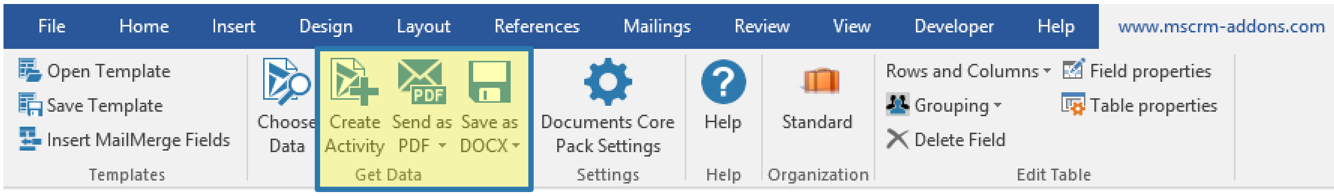


Figure 2 Controls in the www.mscrm-addons.com tab

CREATE AN ACTIVITY

(for further information, please have a look at CHAPTER 1.7.1, CREATE AN ACTIVITY ON PAGE 18)

SAVE AS

(for further information, please have a look at CHAPTER 1.7.2, SAVE AS .DOCX ON PAGE 20)
and

SEND AS

(for further information, please have a look at CHAPTER 1.7.3, SEND AS .PDF ON PAGE 22)

1.7.1 Create an activity

DocumentsCorePack Client provides lots of possibilities to process the document after its creation. One is, for example, to create letter-, fax- and email-activities with the document attached. To access this option, please simply click on the ***[Create Activity]***-button in the mscrm-addons.com-tab. For further information on the tab, please have a look at CHAPTER 1.1, THE WWW.MSCRM-ADDONS.COM TAB ON PAGE 5.

Figure 3 Create Activity button

The following dialog will pop up after pressing the button. This dialog enables you to create a new Dynamics 365 activity. This dialog is the starting point for all activity types. While this chapter provides you with general information, more detailed information on how to create an email activity (please see CHAPTER 3.4, HOW TO CREATE AN EMAIL ACTIVITY ON PAGE 44) and on how to create a fax/letter activity (please see CHAPTER 3.3, HOW TO CREATE A FAX/LETTER ACTIVITY ON PAGE 43) can be found in our How To-section.

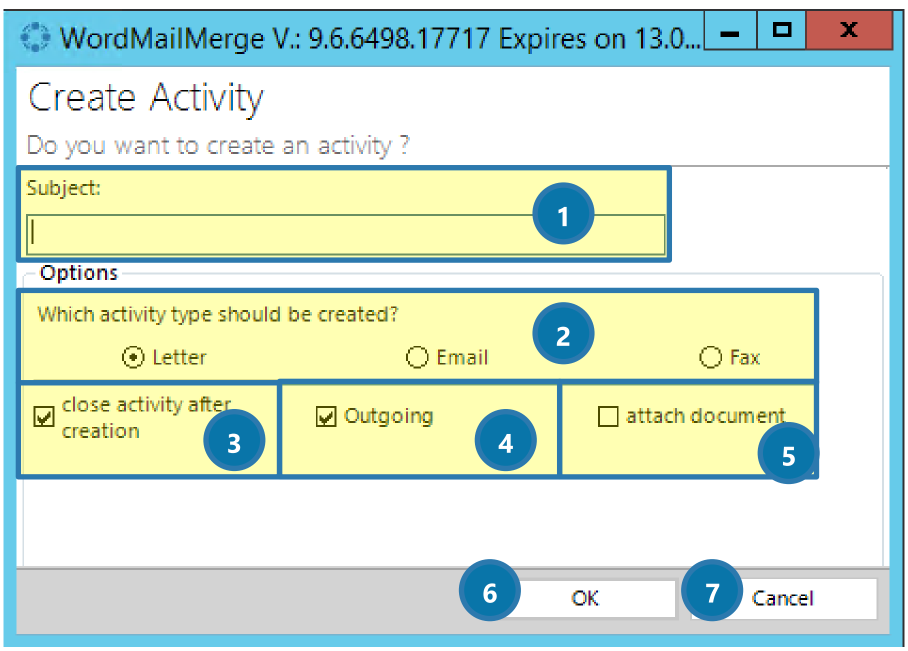


Figure 4 Create Activity options

1 SUBJECT

Please insert the subject of the activity you would like to create here.

2 OPTIONS

Please select the type of activity you would like to create here. You can select between letter, email and fax.

3 Close activity after creation

Select this option if you want the activity to be closed after its creation.

4 Outgoing

Select this option if you want to mark this activity as 'outgoing'.

5 Attach document

Select this option if you want to attach a document. The document is only attached as a Note in this case; any other location option is ignored.

Press the ***[OK]***-button 6 to save your settings or press the ***[Cancel]***-button 7 to dismiss your changes.

If you want to create a new activity for a document where an activity has already been created, you will be provided with the following dialog:

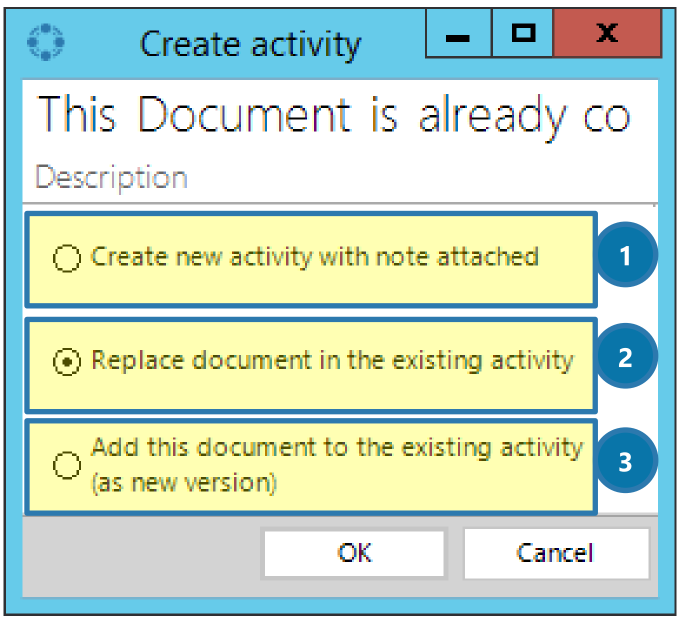


Figure 5 Select an option to proceed with another activity

Please select one the following options and click on the ***[OK]***-button to proceed.:

1 Create new activity with note attached

This option creates a new activity with a note attached to the activity.

2 Replace document in the existing activity

This option replaces the former document with the newly created document in an existing activity.

3 Add this document to the existing activity (as a new version)

This option adds the newly created document to an existing activity (as a new version).

1.7.2 Save as .docx

This feature offers you the option to save a document directly to the proper location in Dynamics 365 without the need of generating an activity.

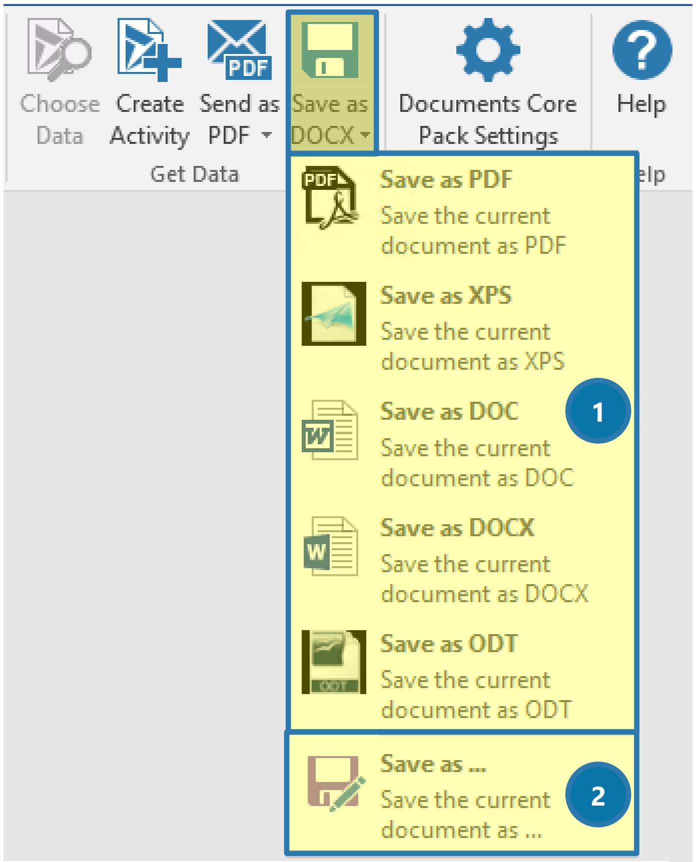


Figure 6 Save as .docx-button

① The document can be saved directly from the drop-down menu in various formats, like
PDF
XPS
DOC
DOCX OR
ODT

The button itself saves the document as an MS OFFICE WORD OPEN XML DOCUMENT (DOCX). Document types that are supported by Word but not listed in the menu can be selected with the ② SAVE AS...-OPTION.

Directly after the merge, the document might only have a generic name (e.g. *Result1223473.docx*) the *DocumentName* property will be applied when you use the ***[Save as DOCX]***-button. If no *DocumentName*-property is set, the name that is displayed in the header of Word (e.g. *Document1*, or *Result1223473.docx*) will be used in the save document location.

DocumentsCorePack template properties like *Document Name*, *Create Activities For* and *Save To Subfolder* affect the location and the name of the document when using this feature. Please have a look at the Template Designer Guide on our website for further information.

The ***[Save as]***-button can be disabled in the DocumentsCorePack settings.
For further information on the DCP Settings, please have a look at CHAPTER 3, THE DOCUMENTSCOREPACK CLIENTS SETTINGS ON PAGE 28.

1.7.3 Send as .PDF

The ***[Send as .PDF]***-button offers you the option to send a document directly to the proper location in Dynamics 365 without the need of generating an activity. For a more detailed description of how to use the button properly, please have a look at CHAPTER 4.3, HOW TO USE THE [SEND AS .PDF]-BUTTON ON PAGE 39.

No matter, which Send as…-option you use, as soon as you have selected one of the options, a Dynamics 365 or an Outlook E-Mail window will arise, depending on your configuration. The document will be automatically attached to that e-Mail.

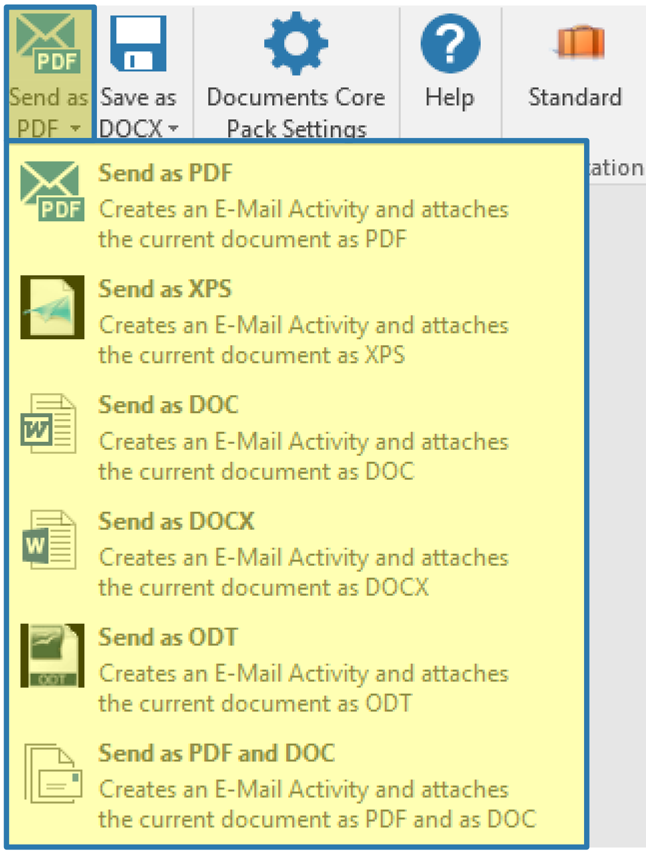


Figure 7 Send as .pdf - button

The document can be sent directly from the drop-down menu in various formats, like
PDF
XPS
DOC
DOCX
ODT OR
PDF AND DOC
The button itself sends the document as a .PDF. The files are usually saved temporarily before they are sent.

In the DocumentsCorePack Settings, the .PDF settings can be defined. Here, you have the possibility to define if a/which *PDF-printer* should be used, how the temporarily saved *.PDF files* should be handled and whether Outlook should be used to send the outgoing emails or not. For further information, please have a look at CHAPTER 2, THE DOCUMENTSCOREPACK CLIENT SETTINGS ON PAGE 26.

When using Outlook, the DCP Client does not automatically create an activity – this is done by the Outlook Client.

1.8 After the bulk merge

This chapter provides you with further information on how to process templates after the bulk merge. There are three main functions

1. A SECTION WITH BUTTONS THAT ALLOW YOU TO PROCESS THE SO CREATED DOCUMENTS,
2. A PREVIEW OF THE DOCUMENT and
3. A LIST OF THE CREATED DOCUMENTS

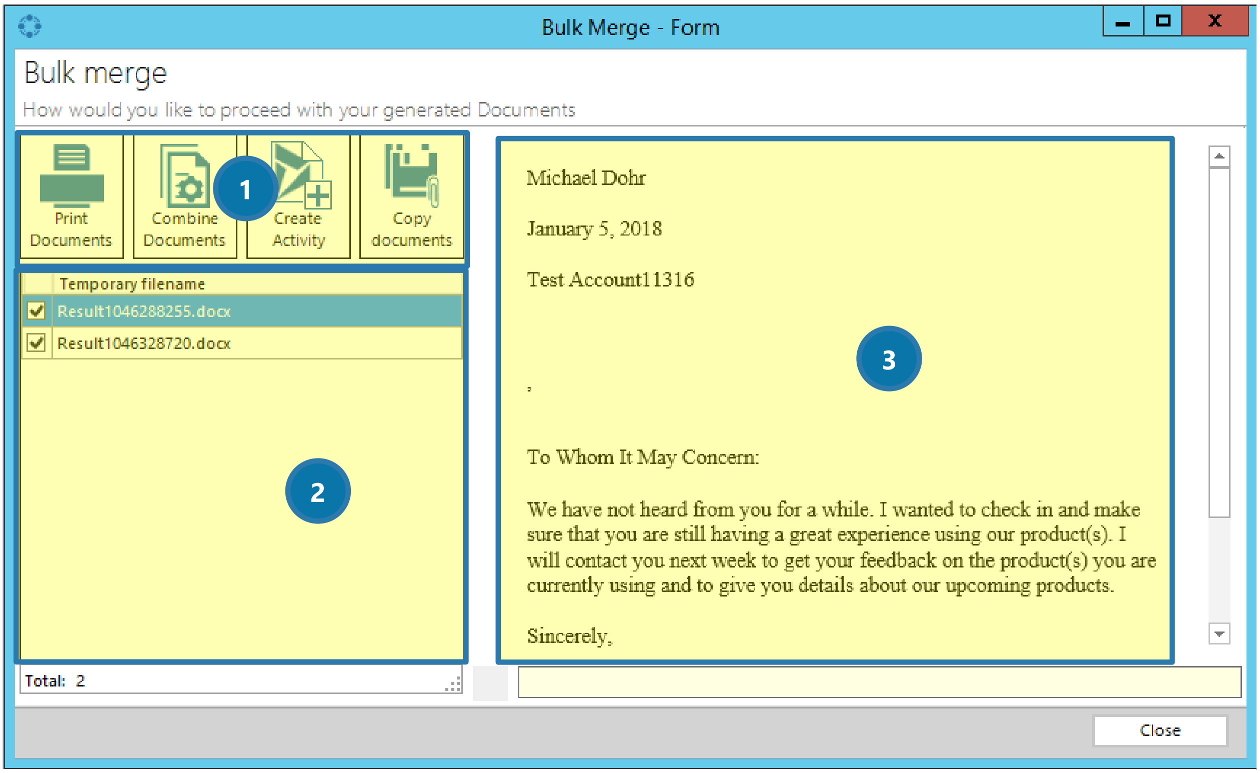


Figure 8 Bulk Merge - Form

At this point, the documents only have a temporary name. This name will be replaced with the *DocumentName* property, if it is set in the properties.

1.8.1 The bulk merge processing-buttons

This chapter provides you with further information on the four bulk merge buttons, which allow you to process documents that have been created in bulk merge.

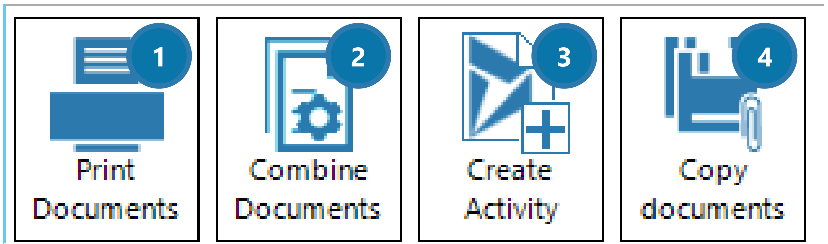


Figure 9 Bulk merge processing-buttons

❶ THE ***[PRINT DOCUMENTS]***-BUTTON

Click on this button if you want to print the created documents.

❷ THE ***[COMBINE DOCUMENTS]***-BUTTON

Use this button if you want to concatenate the created documents.

❸ THE ***[CREATE ACTIVITY]***-BUTTON

Click on this button to create a new activity.

❹ THE ***[COPY DOCUMENTS]***-BUTTON

Click on this button, if you want to copy the documents to a certain destination folder.

2 The DocumentsCorePack Client Settings

The DocumentsCorePack Settings summarize application settings for both intended usages of the client. This chapter will only cover the settings that are of interest for the DocumentsCorePack Client itself. The other settings, that are only relevant for the Template Designer, are to be found in the DocumentsCorePack TemplateDesigner documentation.

The DocumentsCorePack Settings can be accessed from within the mscrm-addons.com-tab.

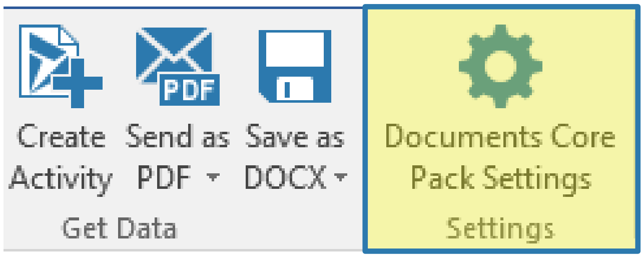


*Figure 10 **[DocumentsCorePack Settings]**-button*

The settings are grouped into several tabs, like you can see in the figure below.

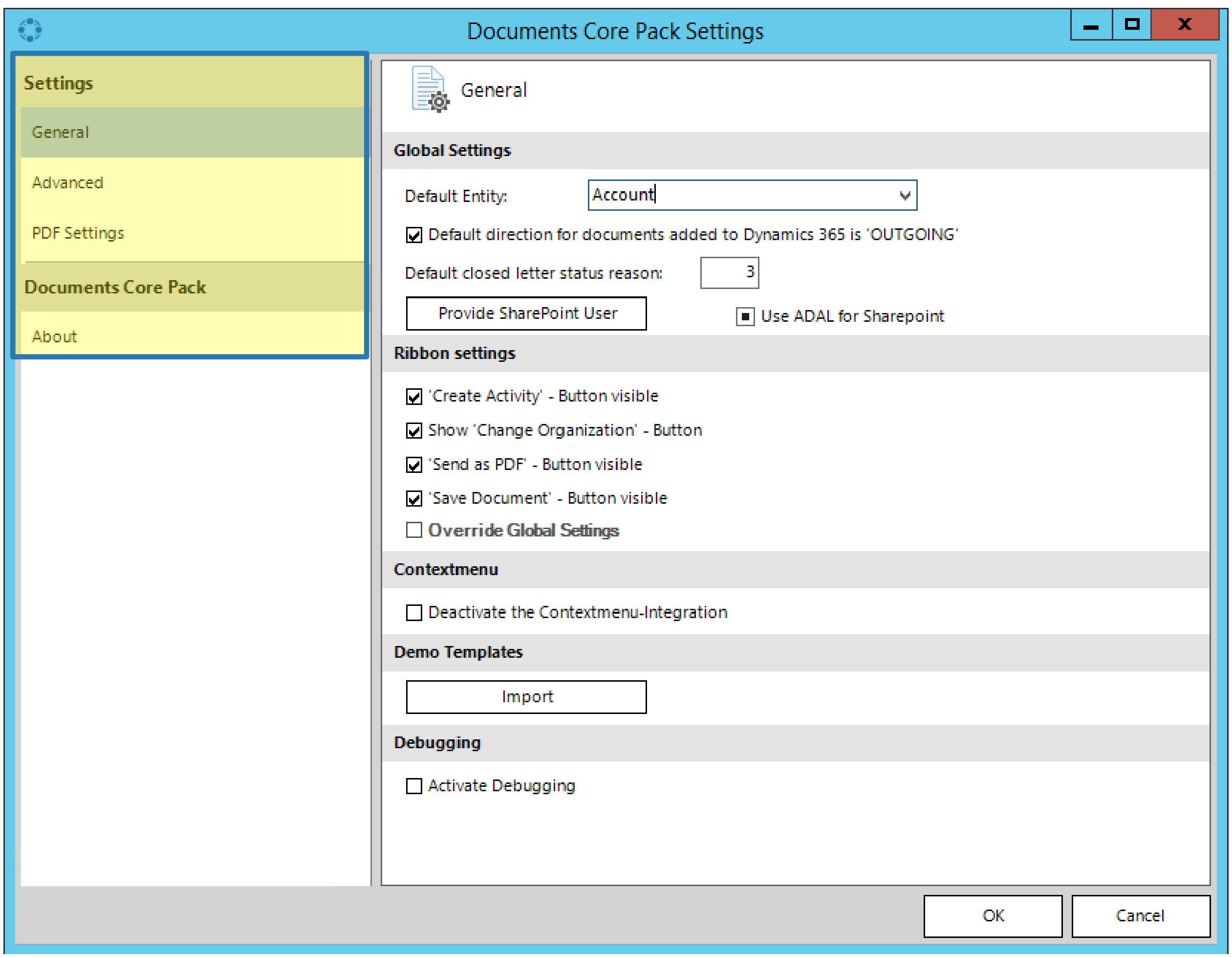


Figure 11 DocumentsCorePack Settings

2.1 General

The General-tab contains three settings that are important for DocumentsCorePack Client. This chapter will only cover the settings that are of interest for the DocumentsCorePack Client itself. The other settings, that are only relevant for the Template Designer, are to be found in the DocumentsCorePack TemplateDesigner documentation.

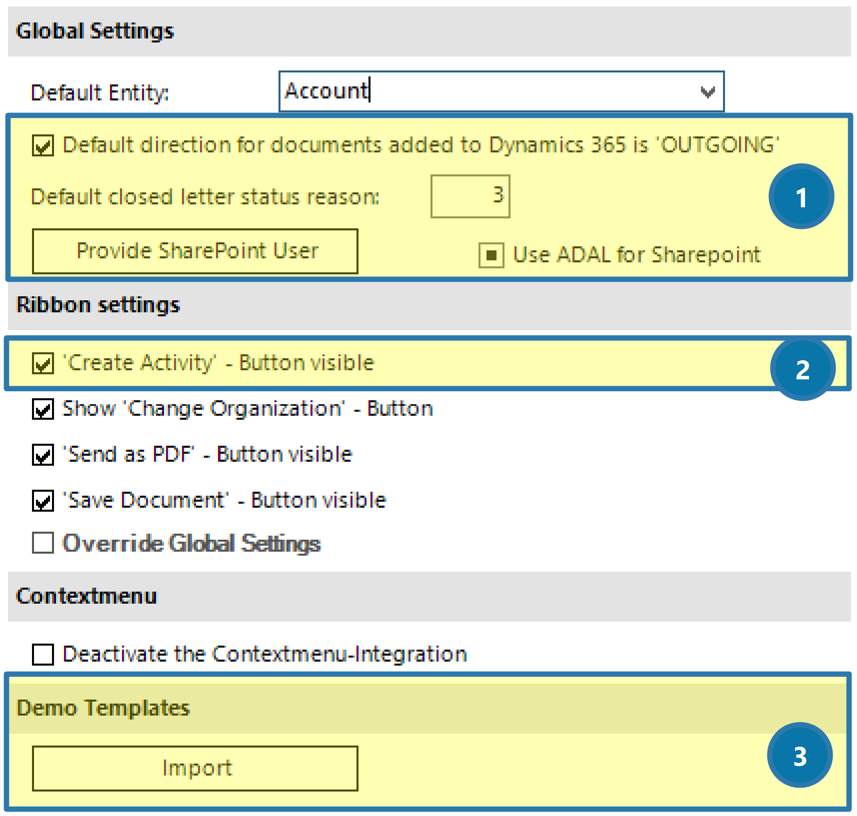


Figure 12 DocumentsCorePack Settings - General tab

❶ GLOBAL SETTINGS

DEFAULT DIRECTION FOR DOCUMENTS ADDED TO DYNAMICS 365 IS ‚OUTGOING'

This setting defines the default direction for created activities (letter, fax) as outgoing.

DEFAULT CLOSED LETTER STATUS REASON: Displays the Dynamics 365 activity status.

PROVIDE SHAREPOINT USER

If it is necessary, you may enter some extra SharePoint credentials here.

SharePoint Settings are not on Integrated Security

❷ Activate the visibility of buttons

Check one or more of the available boxes if you want the ***[Create Activity]***-button, the ***[Show 'Change Organization']***-button, the ***[Send as PDF]***-button or the ***[Save Document]***-button to be visible in the www.mscrm-addons.com-tab.

❸ Demo Templates – Import button

With a click on this button, you have the possibility to import demo templates. Usually, all demo templates are imported by default, but you never know.

2.2 Advanced

The Advanced-tab contains two settings that are important for DocumentsCorePack Client. This chapter will only cover the settings that are of interest for the DocumentsCorePack Client itself. The other settings, that are only relevant for the Template Designer, are to be found in the DocumentsCorePack TemplateDesigner documentation.

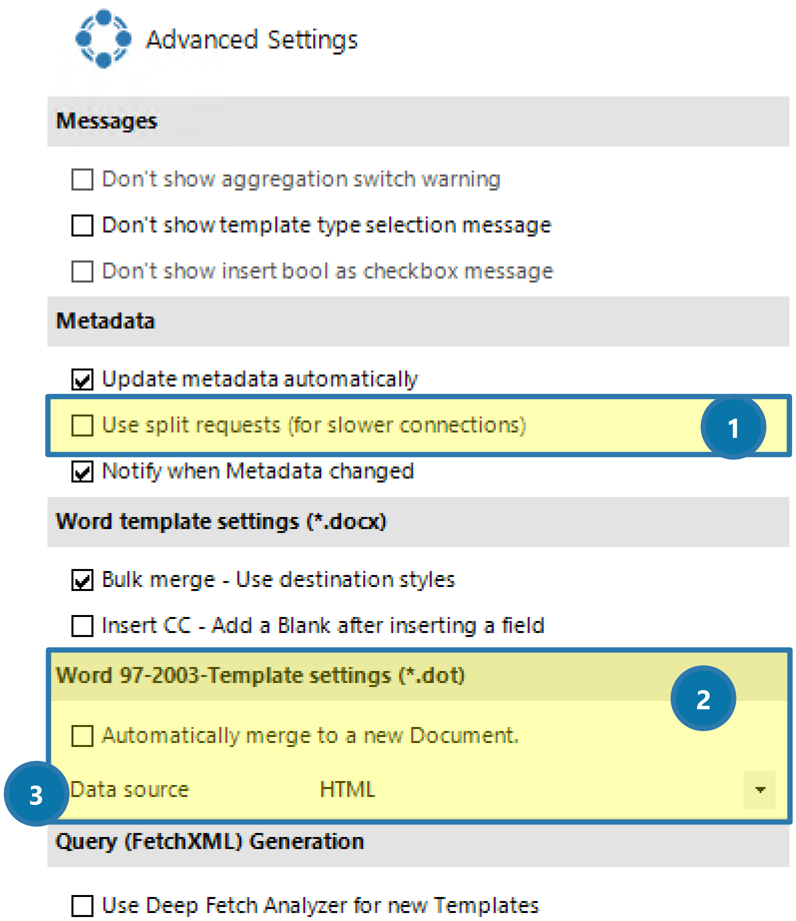


Figure 13 DocumentsCorePack Settings - Advanced tab

1 USE SPLIT REQUESTS (FOR SLOWER CONNECTIONS)

Activate this setting only if you have contacted our support/dev team previously. You must not change this setting without permission of our support. The activation is only necessary if you are dealing slow connections.

2 AUTOMATICALLY MERGE TO A NEW DOCUMENT

Once checked, new documents will automatically be generated as soon as the data is loaded. (e.g. after hitting the ***[Export to Word]***-button in a quote template).

③ Datasource

Select the data source that should be used to save temp-data here. You have the possibility to select between the following sources:

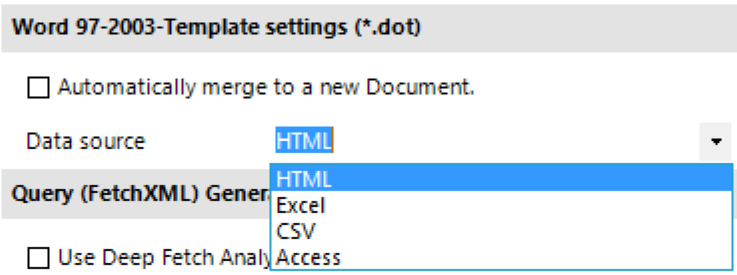


Figure 14 Select between various data sources

This setting is only relevant for 'old' .dot templates and does not affect any .docx templates.

2.3 PDF Settings

The PDF Settings-tab contains only information that is of interest to the DocumentsCorePack Client itself.

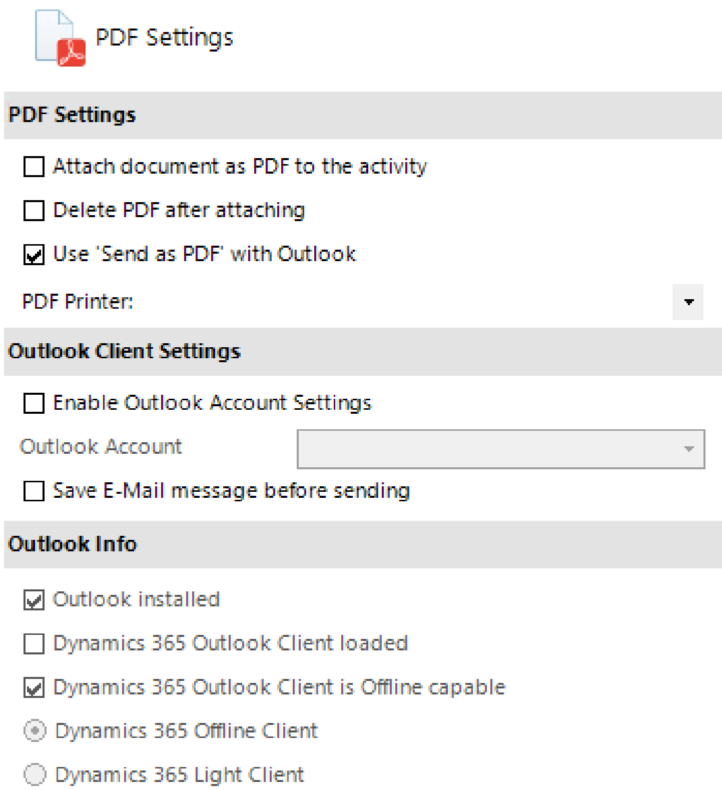


Figure 15 PDF Settings

❶ PDF Settings

Attach document as PDF to the activity

By default, the document will be saved as a *.doc – file when using “Create activity”. This setting enables to save PDF files instead.

Delete PDF after attaching

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

Use ‘Send as PDF’ with Outlook

If checked, the document generated by the *Send as PDF*–routine will be attached to an e-mail in MS Outlook instead of an email-activity.

When opened in the browser and if this setting is enabled, the MS Outlook Client is responsible to create the Activity in Dynamics 365 by tracking. The DCP Client does not create an activity in this case.

PDF-Printer / PDF Creator [OBSOLETE]

Newer versions of Dynamics 365 have a PDF printer and creator attached automatically. Although you could be provided with a list of available printers, these printers are not further developed or maintained.

❷ Outlook Client Settings

Enable Outlook account settings

As soon as you enable this setting, the Outlook Wizard will help you to configure a new profile.

If you are using several MS Outlook accounts, you might want to define a specific account that should be used by the DocumentsCorePack Client.

Save E-Mail message before sending

Activating this box enables you to save E-Mail messages before you send them.

❸ Outlook Info

This option provides you with some Outlook information.

2.4 About

The About-tab provides you with general information regarding your product and license.

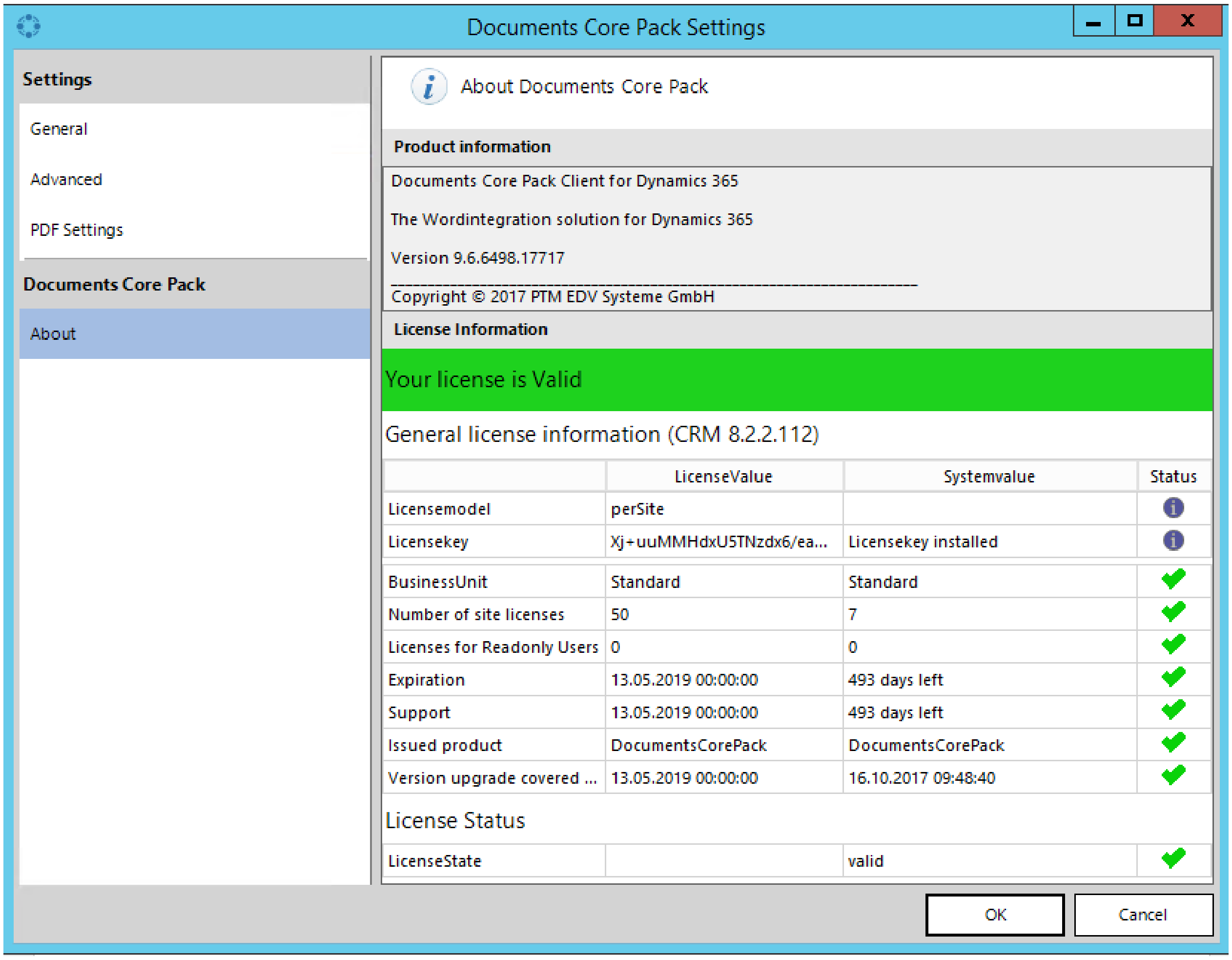


Figure 16 DocumentsCorePack Settings - About-tab

3 Tutorials (“How To’s”)

This chapter provides you with helpful tutorials that show how to work with DocumentsCorePack Client efficiently.

3.1 How to generate a document (single merge) out of Dynamics 365

This tutorial requires that you already know which template you want to merge. The generation of the document can be done in two different ways: directly out of Dynamics 365 or right out of MS Word. In this tutorial, you will learn how to generate a document directly out of Dynamics 365.

3.1.1 Step 1: Open a record and click on the *[Export to Word]*-button

First, we need to generate a document. To do so, please open the Dynamics 365 record for which you want to generate a document.

Next, click on the ***[Export to Word]***-button, which is placed in the Command Bar. A list of templates opens.

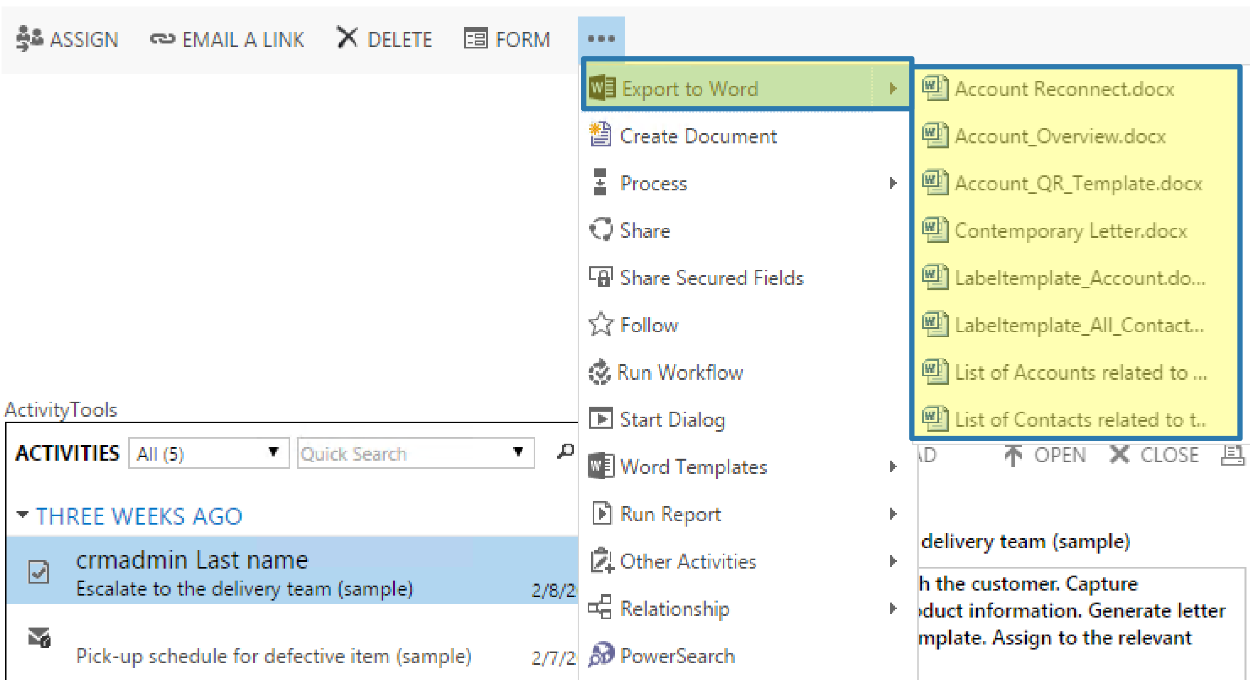


Figure 17 [Export to Word]-button

The ***[Export to Word]***-button is also accessible from the grid view to bulk merge records. Besides, it is also available in the menu of the record itself.

3.1.2 Step 2: Select a template and get the result

After you have selected a certain template from the list by clicking on it, the template will be opened in MS Word automatically. For our purpose, we have selected Account_QR_Template.docx, because it does not only show the template, but also an inserted QR code.

The so received template is also the result. As you see below, the information of the recipient at the top has already been added to your template.

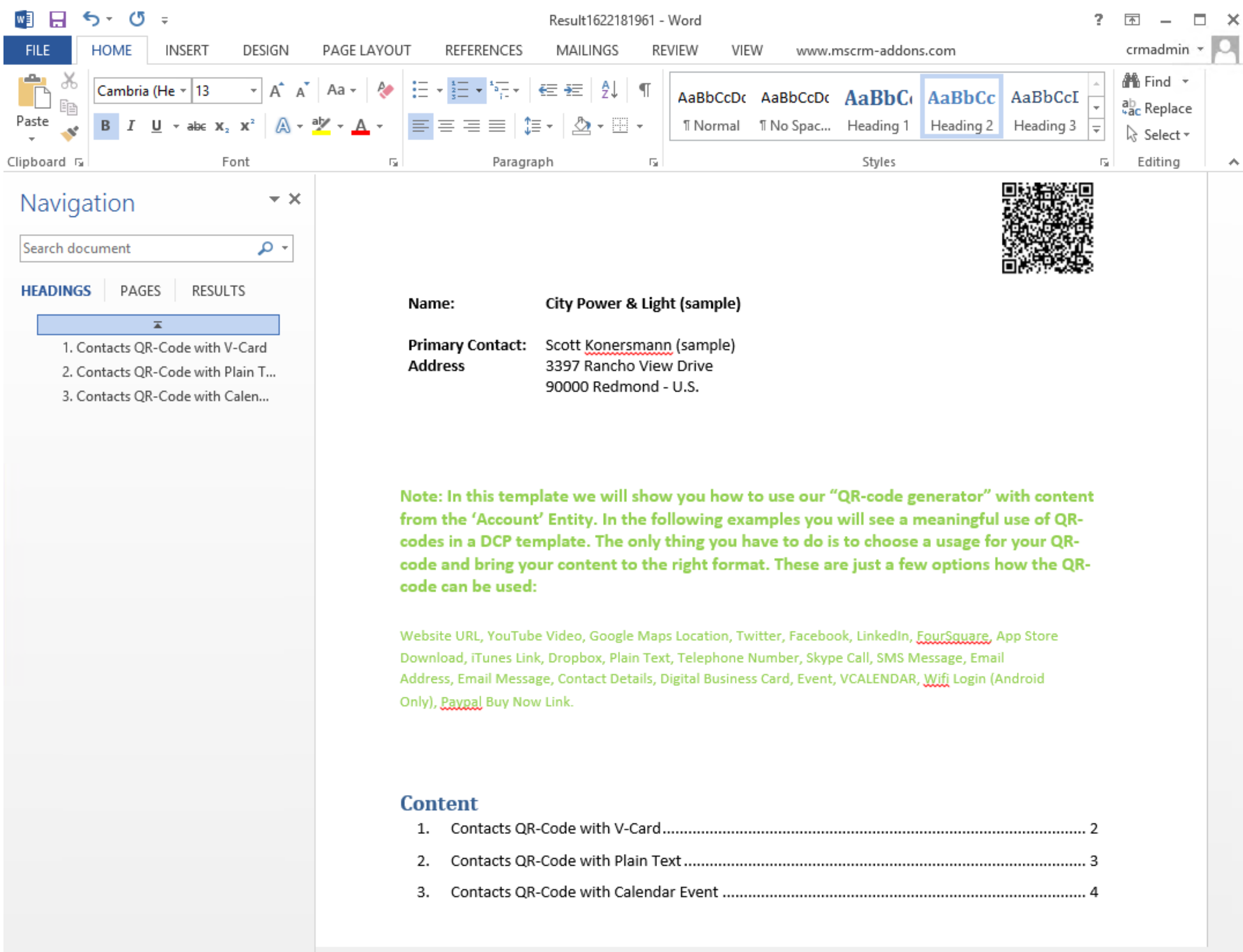


Figure 18 Account_QR_Template.docx

Finally, you have the possibility to process the template using the mscrm-addons.com tab. For further information on the mscrm-addons.com-tab, please have a look at CHAPTER 1.1, THE WWW.MSCRM-ADDONS.COM TAB ON PAGE 5.

No matter how you proceed, please do not forget to save your template!

3.2 How to generate a document (single merge) out of MS Word

In this tutorial, you will learn how to generate a document directly out of MS Word. Please follow the steps carefully.

3.2.1 Step 1: Open a new template

To do so, please open a new MS Word document and go to the mscrm-addons.com-tab. There, click on the ***[Open Template]***-button. For further information on the tab, please have a look at CHAPTER 1.1, THE WWW.MSCRM-ADDONS.COM TAB ON PAGE 5.

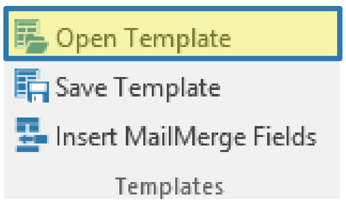


Figure 19 [Open template]-button in the www.mscrm-addons.com-tab

In the so opened dialog, please select an entity and a template. Next, click on the ***[Open]***-button to proceed.

Templates are usually separated by entities, this means that every template belongs to an entity. Therefore, you should select an entity first before you select a template.

For demonstrating purposes, we select the entity *Quote* and the template *Quote_base.docx*.

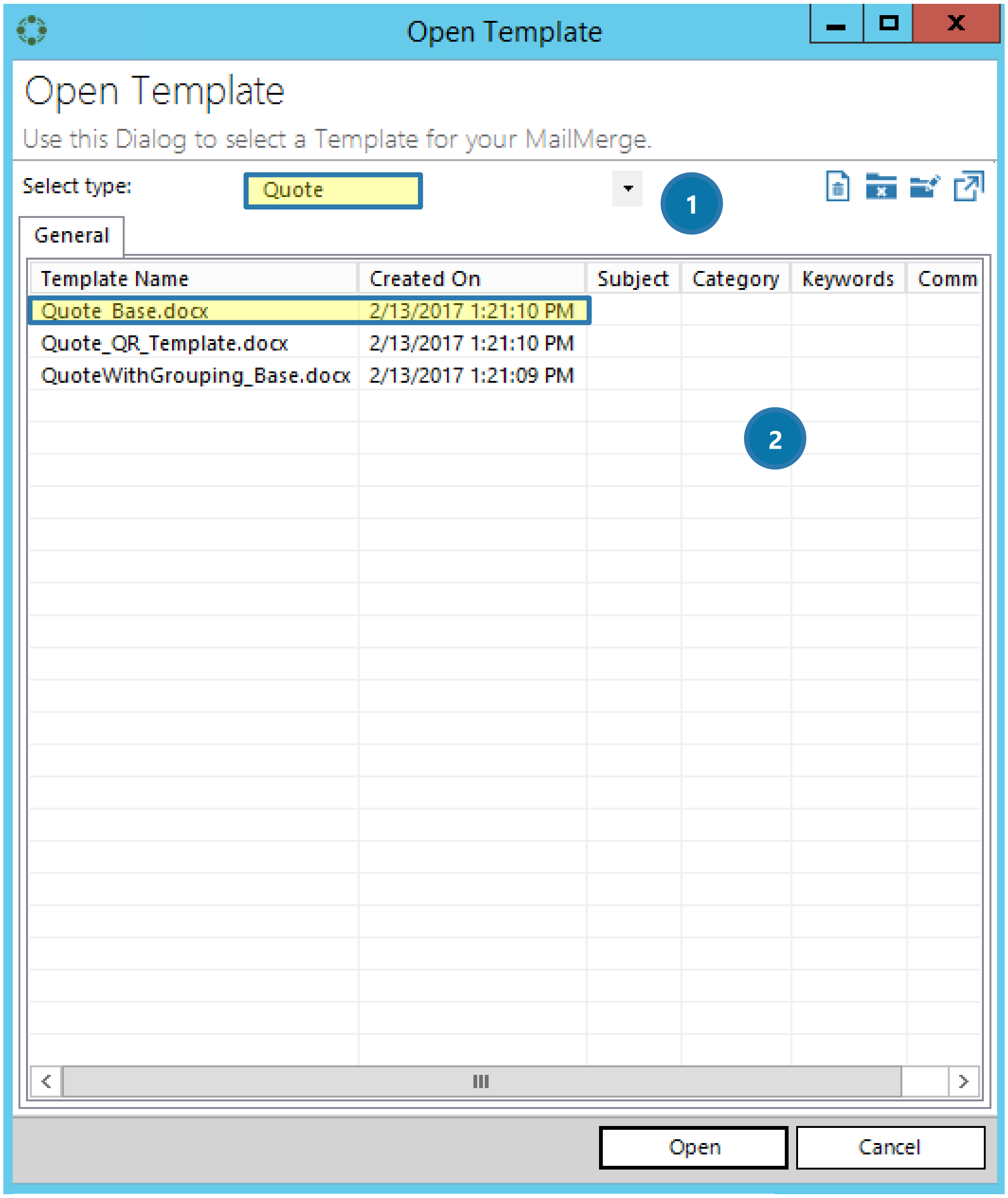


Figure 20 Open template-dialog

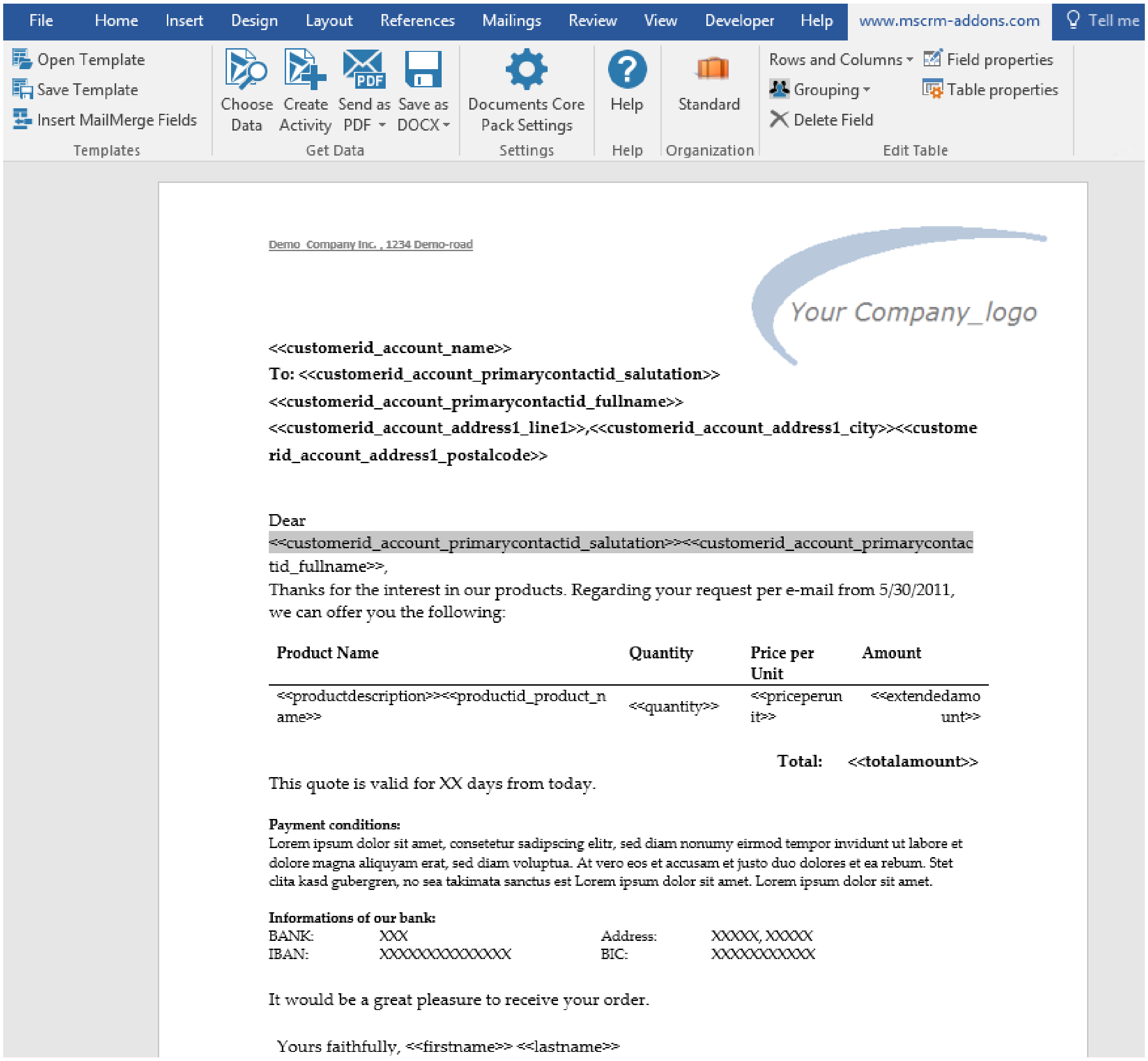
① Select type

Please select an entity type in the drop-down menu of this section.

② General

You will find all templates related to the previously selected entity type here. Please select a template of your choice and proceed with a click on the ***[Open]***-button or cancel your settings with a click on the ***[Cancel]***-button.

This action opens the selected template. We will proceed by merging the template with Dynamics 365 data.



Demo_Company Inc. , 1234 Demo-road

<<customerid_account_name>>
To: <<customerid_account_primarycontactid_salutation>>
<<customerid_account_primarycontactid_fullname>>
<<customerid_account_address1_line1>>,<<customerid_account_address1_city>><<customerid_account_address1_postalcode>>

Dear <<customerid_account_primarycontactid_salutation>><<customerid_account_primarycontactid_fullname>>,
Thanks for the interest in our products. Regarding your request per e-mail from 5/30/2011, we can offer you the following:

Product Name	Quantity	Price per Unit	Amount
<<productdescription>><<productid_product_name>>	<<quantity>>	<<priceperunit>>	<<extendedamount>>
		Total:	**<<totalamount>>**

This quote is valid for XX days from today.

Payment conditions:
Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet.

Informations of our bank:

BANK:	XXX	Address:	XXXXX, XXXXX
IBAN:	XXXXXXXXXXXXXX	BIC:	XXXXXXXXXXX

It would be a great pleasure to receive your order.

Yours faithfully, <<firstname>> <<lastname>>

Figure 21 Quote_base.docx template before the merge

3.2.2 Step 2: Select Data – simple find

Now, we have to select the contact we want to create a letter for. To do so, we proceed with a click on the ***[Choose data]***-button, which you as well find in the www.mscrm-addons.com-tab. For further information on the tab, please have a look at CHAPTER 1.1, THE WWW.MSCRM-ADDONS.COM TAB ON PAGE 5.

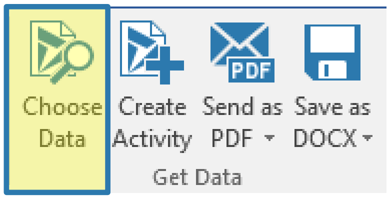


Figure 22 Choose Data button in the mscrm-addons.com-tab

The so opened *Search* - dialog consists of two tabs. The *General* and the *Saved Views*-tab. For a simple merge, use the General tab, select an entity ❶ in the *Find in:* drop-down menu and click on the ***[Search]***-button ❷. If you do not insert anything into the *Name*-field ❸, you will be provided with all the available data ❹. If you insert a term into the *Name*-field, you will be provided only with data that includes that term. Checking the *Active Records*-checkbox ❺ will provide you only with active records.

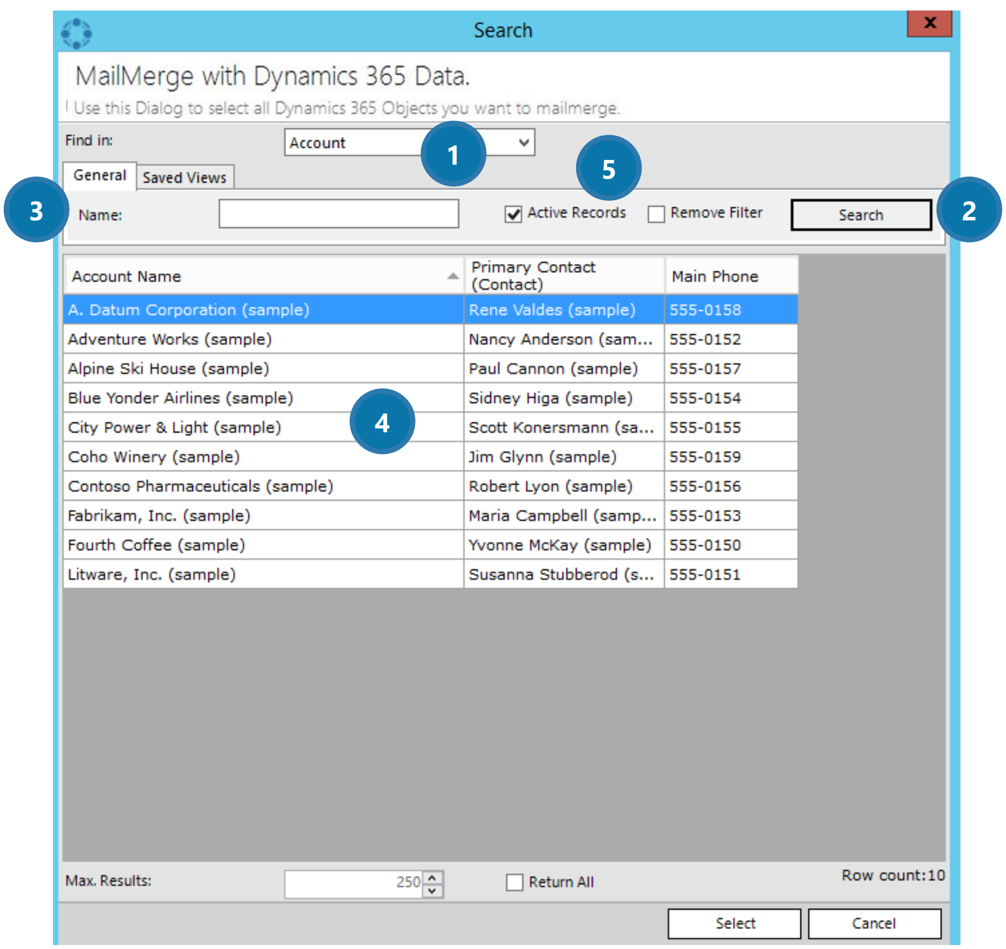


Figure 23 Search-dialog

3.2.3 Step 2a: Select data – advanced find (optional)

Instead of using a simple find, you have the possibility to find your data on an advanced level using the functionality of the *Saved Views* – tab 1.

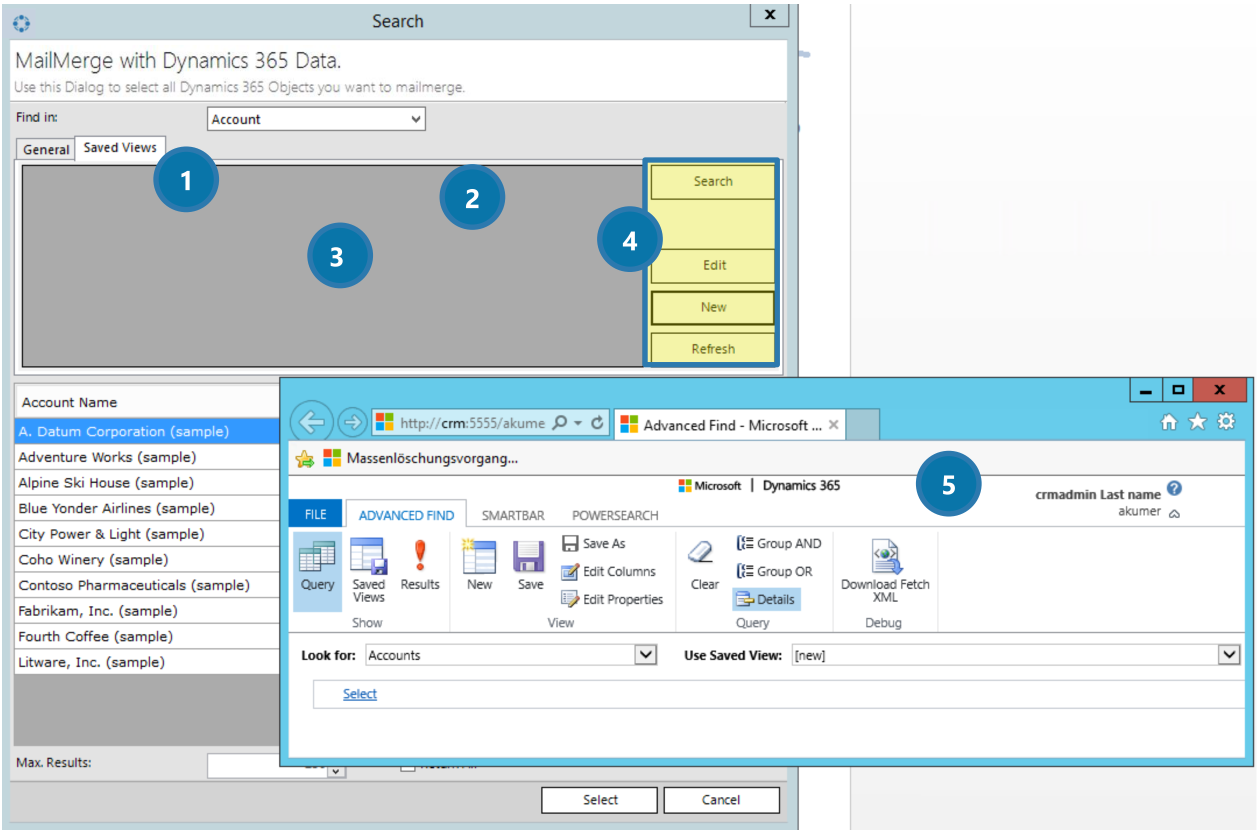


Figure 24 Mail Merge using saved views

Equal to the *General*-tab, please select an entity 2 in the *Find in:*-drop down menu. In the now highlighted in grey field 3 under the *Saved Views*-tab 1, you would usually find all the saved views related to that entity. In order to use such a saved view, you would simply have to select the saved view and to click on the ***[Search]***-button, which you find in the *Edit*-section 4 on the right side. The results would be shown below (equal to the *General*-tab).

4 The Edit Section

In this section, you will find some buttons that enable you to edit/create and refresh your saved views.

A click on the ***[New]***-button, for example, opens the *Advanced Find* in Dynamics 365 5 and allows you to refine your search results for a new view. The Advanced Find settings can later be saved as a new view in the *Saved Views*-tab.

Click on the ***[Edit]***-button to edit existing views or click on the ***[Refresh]***-button if you would like to refresh already saved views.

3.2.4 Step 3: Select a record and get the result

No matter which way you used to find the record you would like to merge, please select one by clicking on it and proceed with a click on the ***[Select]***-button.

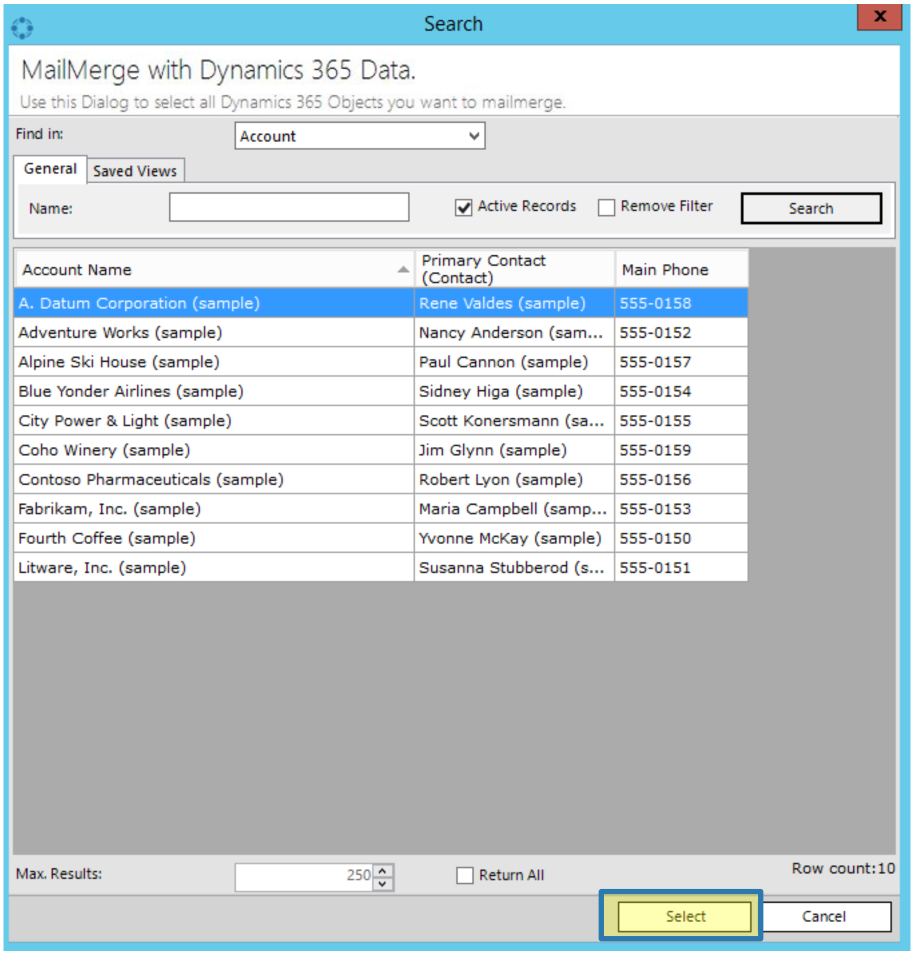


Figure 25 Select a record

The data will be loaded into MS Word, and now a new MS Word document appears with the merged content.

Finally, you have the possibility to process the template using the mscrm-addons.com tab. For further information on the mscrm-addons.com-tab, please have a look at CHAPTER 1.1, THE WWW.MSCRM-ADDONS.COM TAB ON PAGE 5.

No matter how you proceed, please do not forget to save your template!

3.3 How to create a fax/letter activity

This chapter informs you about how to create a fax/letter activity. No matter, which activity type you select, the procedure is the same for these two activities. Before you can use this functionality, the document must be merged. Please have a look at CHAPTER 1.5, SINGLE MERGES ON PAGE 15.

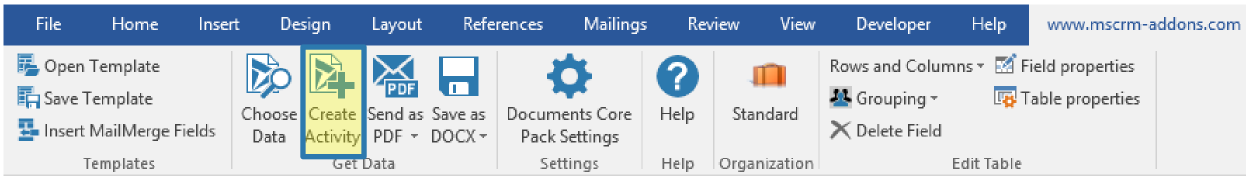


Figure 26 Create Activity

First, insert a Subject into the *Subject*-field. Next, select an activity (Letter or Fax) and define your preferred settings for the activity. For further information, have a look at CHAPTER 1.7.1, CREATE AN ACTIVITY ON PAGE 18. Click on the ***[OK]***-button and the document will be saved.

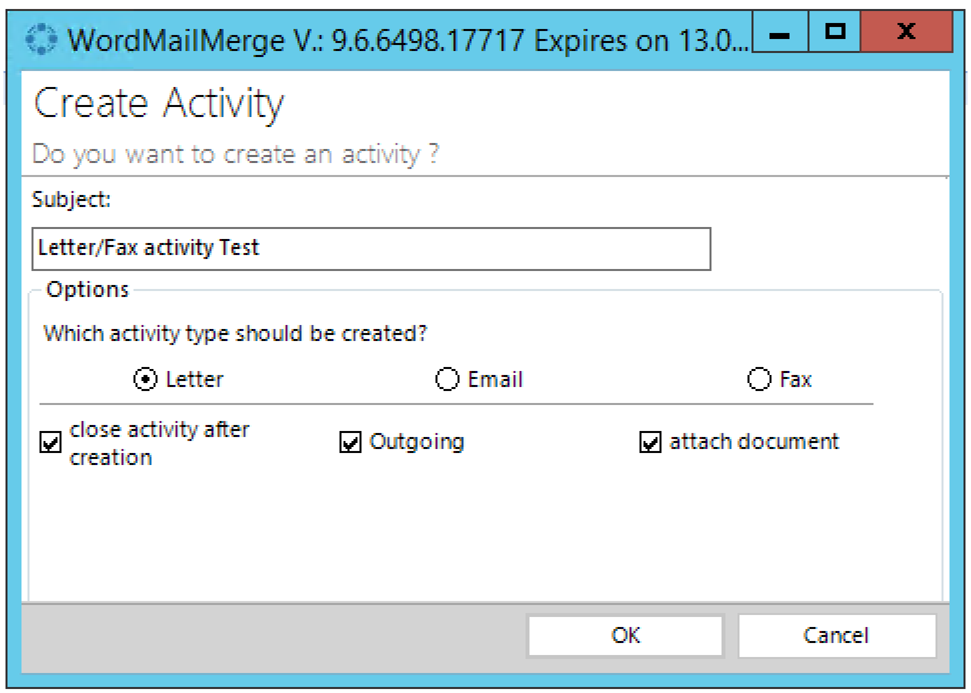


Figure 27 Create Letter/Fax activity

The further processing of the document depends on your save location configuration. For further information, please have a look at CHAPTER 4.1, CONFIGURE SAVE LOCATIONS ON PAGE 52.

3.4 How to create an email activity

This chapter informs you about how to create an email activity, which allows you to define some email-specific properties.

First, insert a Subject for the later e-Mail into the *Subject*-field. Next, select an activity (e-Mail) and define your preferred settings. The e-Mail settings are described below. For further information on how to create an activity in general, have a look at CHAPTER 1.7.1, CREATE AN ACTIVITY ON PAGE 18. However, as soon as you click on the ***[OK]***-button, the e-Mail will be saved.

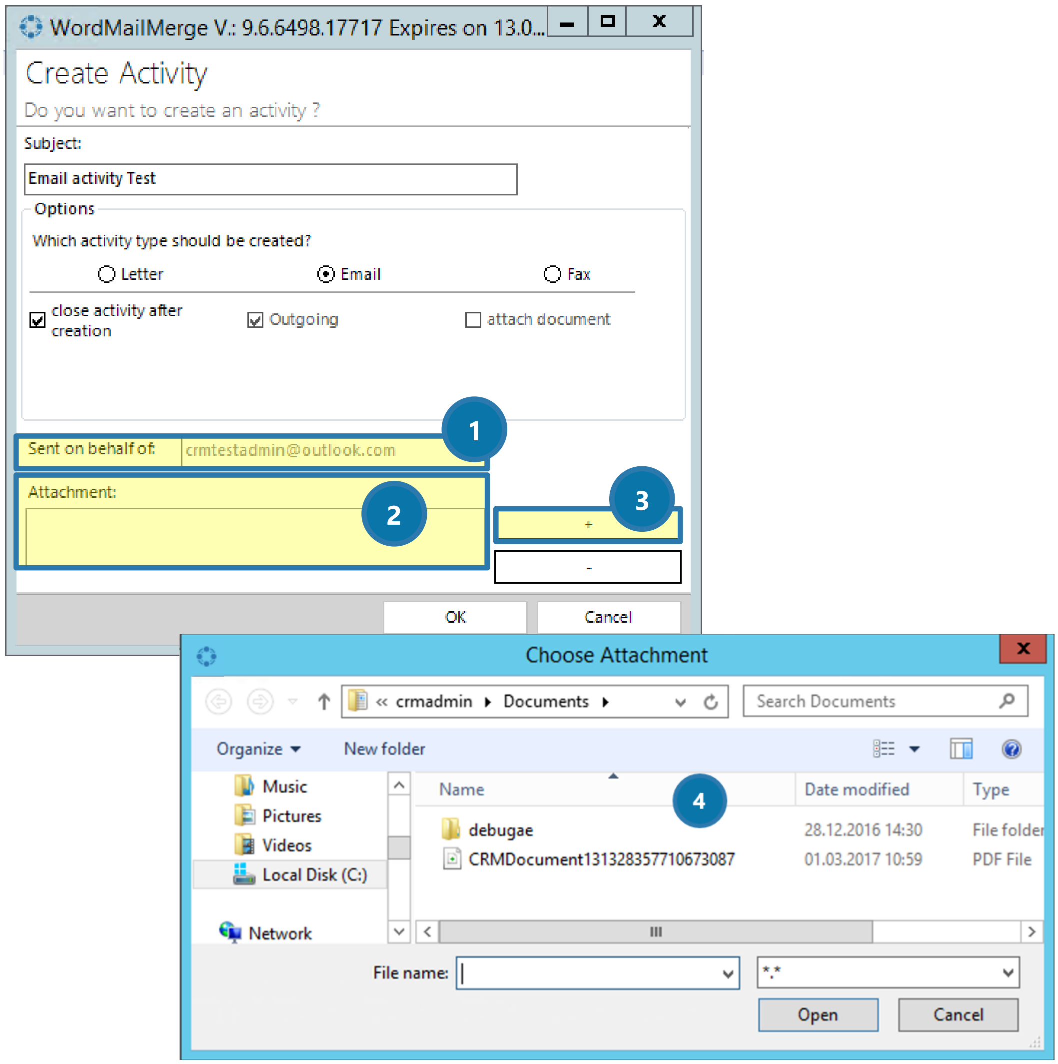


Figure 28 Create E-Mail activity

❶ Sent on behalf of

Please define the sender of the e-Mail here. If left empty, the default sender saved in MS Outlook will be used.

This works only if you have configured this functionality in your Dynamics 365 settings properly.

❷ Attachment

This section enables you to add attachments like for example *Terms & Conditions* or any other document to your e-Mail.

Please click on the ***[Add]***-button ❸ to add an attachment. Clicking on this button will open your save location, where you have the possibility to select an attachment ❹. For further information, please have a look at chapter 4.1, Configure save locations on page 52.

The ***[Remove]***-button (directly under the ***[Add]***-button) enables you to remove the previously selected attachment from the *Attachment*-section.

3.5 How to use the *[Send as PDF]*-button

After the merge, you have the possibility to process the template in many ways. One of them is to use the ***[Send as PDF]***-button. How to use this button properly is described in the below tutorial.

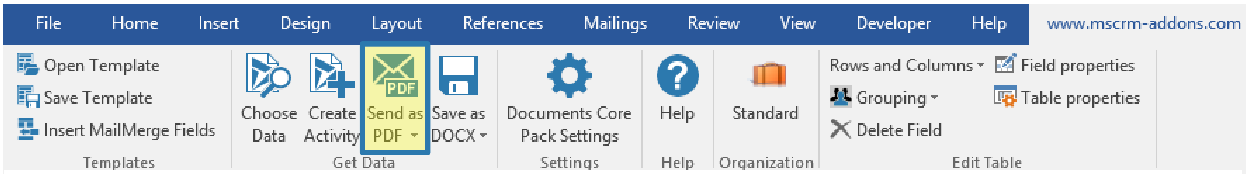


Figure 29 Send as PDF

No matter which option you select to process the template, the starting point is always the www.mscrm-addons.com-tab. For further information on the mscrm-addons.com-tab, please have a look at CHAPTER 1.1, THE WWW.MSCRM-ADDONS.COM TAB ON PAGE 5.

3.5.1 Step 1: Click on the *[Send as PDF]*-button and save your document

This tutorial requires an already saved and merged template.

To start, please click on the ***[Send as PDF]***-button. You have the possibility to select between various options here, but to keep it simple, we only show the ***[Send as PDF]***-button functionality here. For further information on the other possibilities, please have a look at CHAPTER 1.7.3, SEND AS .PDF ON PAGE 22.

However, once you have clicked on the ***[Send as PDF]***-button, you will be asked to save your document temporarily in a save location. You have the possibility to change the name for the .pdf-file and the location where it should be saved here.

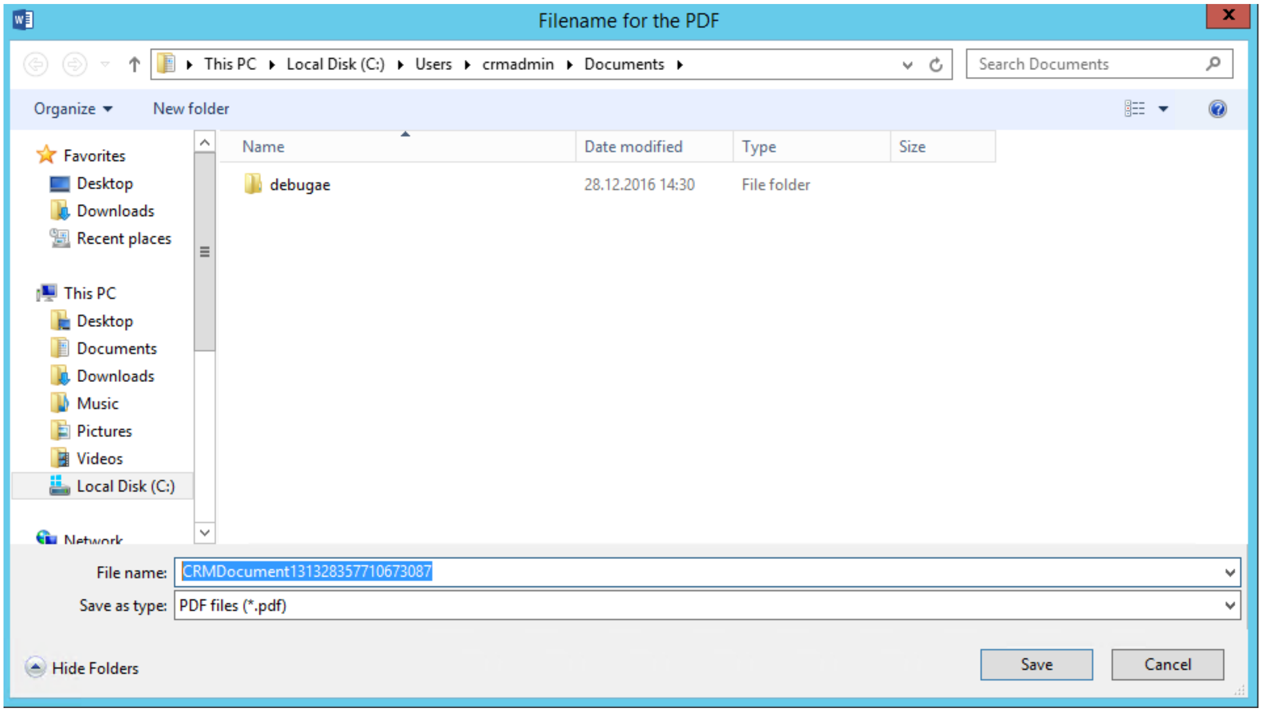


Figure 30 Save the document

After clicking on the ***[Save]***-button, DocumentsCorePack will automatically generate the PDF and bring up a new email-activity with the .pdf-file attached, provided, that you have configured an MS Outlook account.

3.6 How to create letters using bulk merge

Generally, documents can be created for one or for many recipients. In this tutorial, we show you how to insert letters using bulk merge. The tutorial requires a template that has already been saved.

3.6.1 Step 1: Choose Data

Now we have to select the contacts we want to create a letter for. To do so, we proceed with a click on the ***[Choose data]***-button, which you find in the www.mscrm-addons.com-tab**.** For further information on the tab, please have a look at CHAPTER 1.1, THE WWW.MSCRM-ADDONS.COM TAB ON PAGE 5.

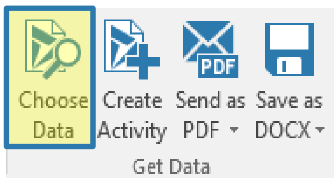


Figure 31 Choose Data button in the mscrm-addons.com-tab

3.6.2 Step 2: Select the records

Once you have selected your desired records, please click on the ***[Select]***-button.

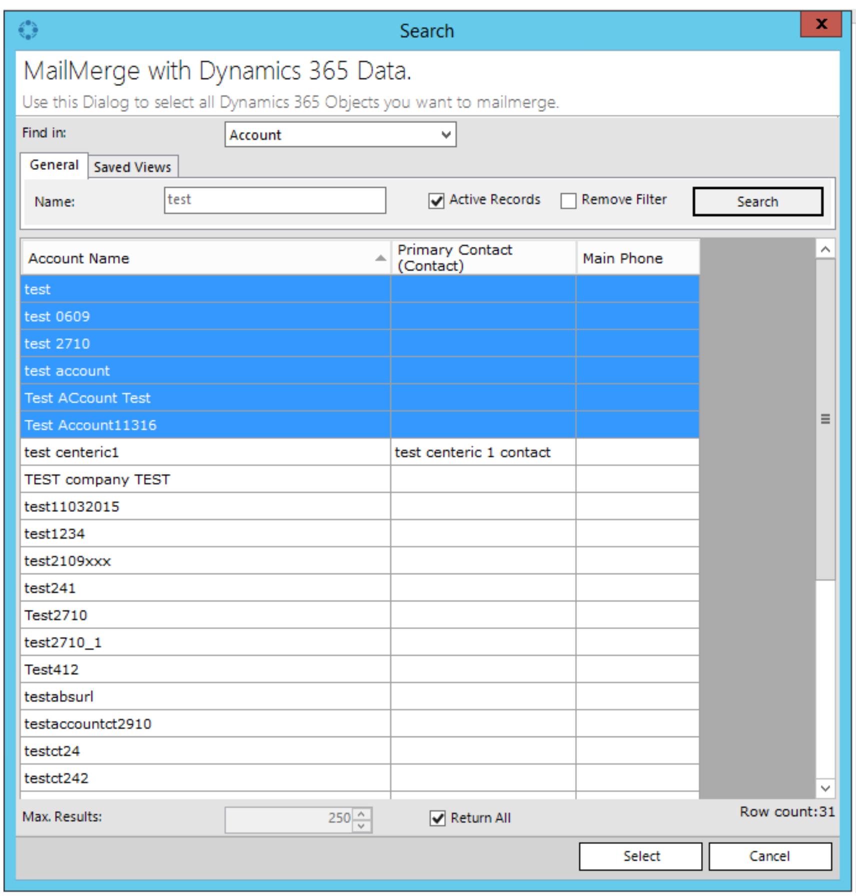


Figure 32 MailMerge with Dynamics 365 Data

The following information box regarding the estimated time remaining will appear in your template.

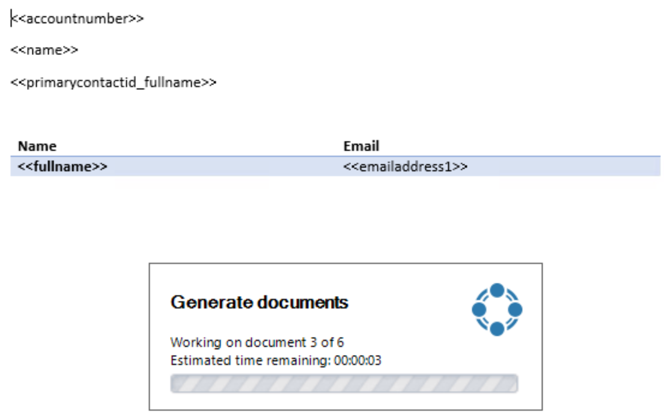


Figure 33 Estimated time remaining – information box

3.6.3 Step 3: Process the so created documents

Next, you will be provided with the following dialog. The Bulk Merge-Form provides you with

1. A SECTION THAT ALLOWS YOU TO PROCESS THE SO CREATED DOCUMENTS,
2. A PREVIEW OF THE DOCUMENT and
3. A LIST OF THE CREATED DOCUMENTS

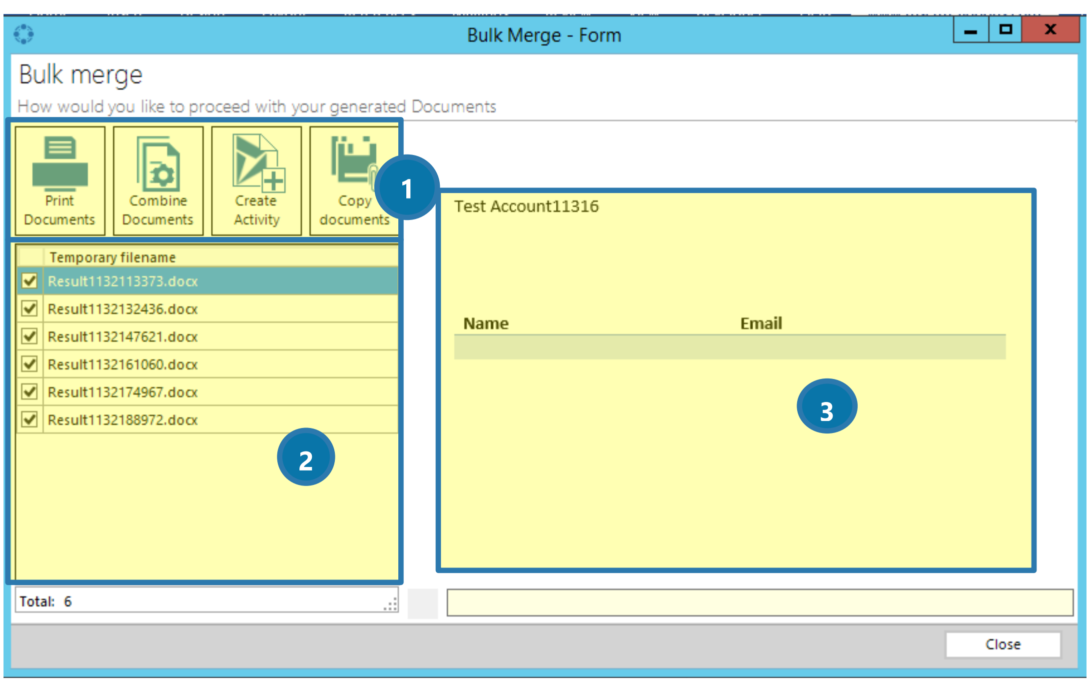


Figure 34 Bulk Merge - Form

At this point, the documents only have a temporary name. This name will be replaced with the *DocumentName* property, if it is set in the properties.

Please select between the following processing options:

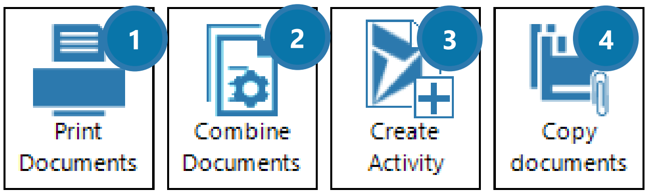


Figure 35 Processing options for bulk merge

① Print Documents

A click on this option sends all the generated documents to your default printer. The printer settings can be changed directly in the Windows printer settings.

② Combine Documents

Using this option combines all generated documents in one Word-document. This document will be opened after the process has been finished.

③ Create Activity

For further information on how to create an activity in general, please have a look at chapter 1.7.1, Create an activity on page 18.

④ Copy Documents

Temporarily generated documents can be copied to a location of your choice. While this step is executed, the *DocumentName*-property will be applied. In case of name conflicts, the name will be extended based on a continuing number.

4 DocumentsCorePack Client Advanced

This chapter includes further information regarding the usage of DocumentsCorePack. In the course of this chapter, you will learn more about specific configuration options. These options are usually applied or configured by an administrator or template designer. Should you require further information on how to create a DocumentsCorePack template, please have a look at the DocumentsCorePack TemplateDesigner documentation.

4.1 Configure save locations

This chapter contains basic information about how to predefine save locations for generated documents using the *Document Properties*.

For example, it is possible to define, that a quote template should be automatically saved into the *parent-customer*-location. Furthermore, the quote-number should be the filename.

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

1) DOCUMENTSCOREPACK SERVER CONFIGURATION (SERVER)
   Here, you have the possibility to define root-paths for all entities. (e.g. contact, account)
   So, all documents created for the entity e.g. contact will be saved to the contact-root unless no subfolder is defined on the client side. For further information on this topic, please have a look at our DocumentsCorePack Server Based documentation in the documentation section of our website.

2) DOCUMENT PROPERTIES (TEMPLATE DESIGNER)
   In the document properties of the template, you will find a setting called *SubFolder*, which allows you to specify a subfolder for the created document. For further information on this topic, please have a look at our TemplateDesigner documentation in the documentation section of our website.

4.2 Pre-filter result rows before generating a document functionality

We have created a function offering the possibility to use a dialog to pre-filter the result rows. This will be helpful if you want to select a specific related entity (e.g. contact) before you start to generate the document. This feature is available with version 5.26 and higher (only for DOCX-templates).

After the configuration of this feature, users will be provided with a *Look Up Record*-window (e.g. like the one in the below screenshot) when creating a new DocX-template. In this window, they can choose one or more of the pre-filtered records and afterward start to generate the document.

Please have a look at CHAPTER 4.3, HOW TO PRE-FILTER ROWS BEFORE GENERATING A DOCUMENT ON PAGE 54 in order to get more information regarding this topic.

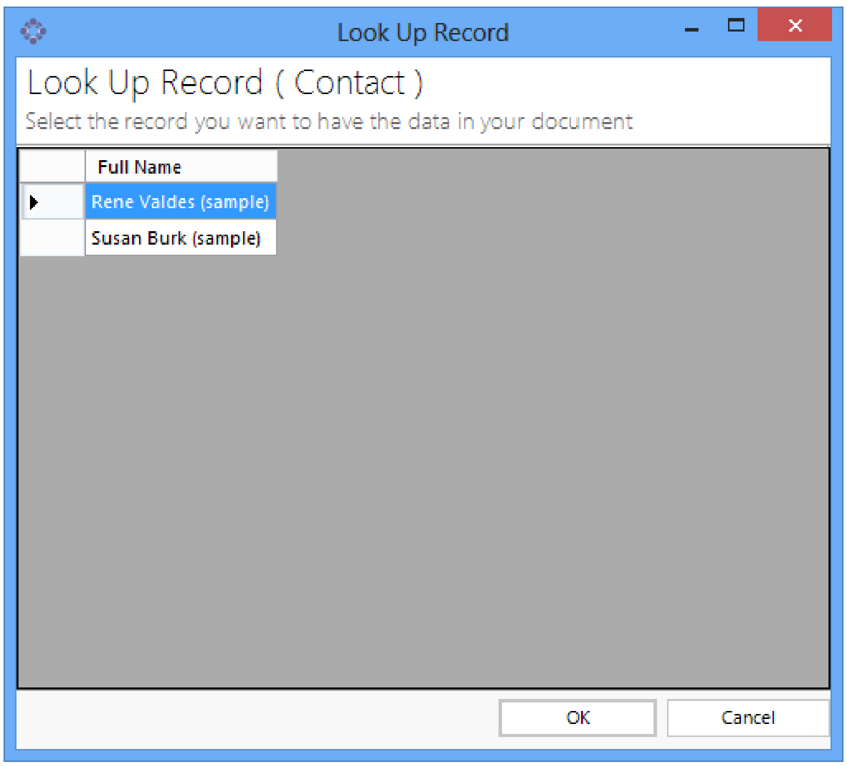


Figure 36 Look up record (contact) - window

4.3 How to pre-filter rows before generating a document

This tutorial outlines how to pre-filter rows before generating a document. This is basically a function that is executed in the DocumentsCorePack TemplateDesigner. This chapter will only cover the settings that are of interest for the DocumentsCorePack Client itself. The other settings, that are only relevant for the TemplateDesigner, are to be found in the DocumentsCorePack TemplateDesigner documentation.

The tutorial requires a saved and prepared template.

4.3.1 Step 1: Open the Template Designer Configure Fields and Datasource-dialog

To do so, please click on the ***[Insert MailMerge Fields]***-button.

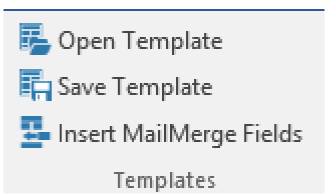


Figure 37 Insert MailMerge Fields

Next, go to the *Additional*-tab 1 in the Template Designer, select a relationship 2 and click on the ***[Edit]***-button 3. This opens the *Configure Fields and Data source*-dialog, which is the base for the filtering process.

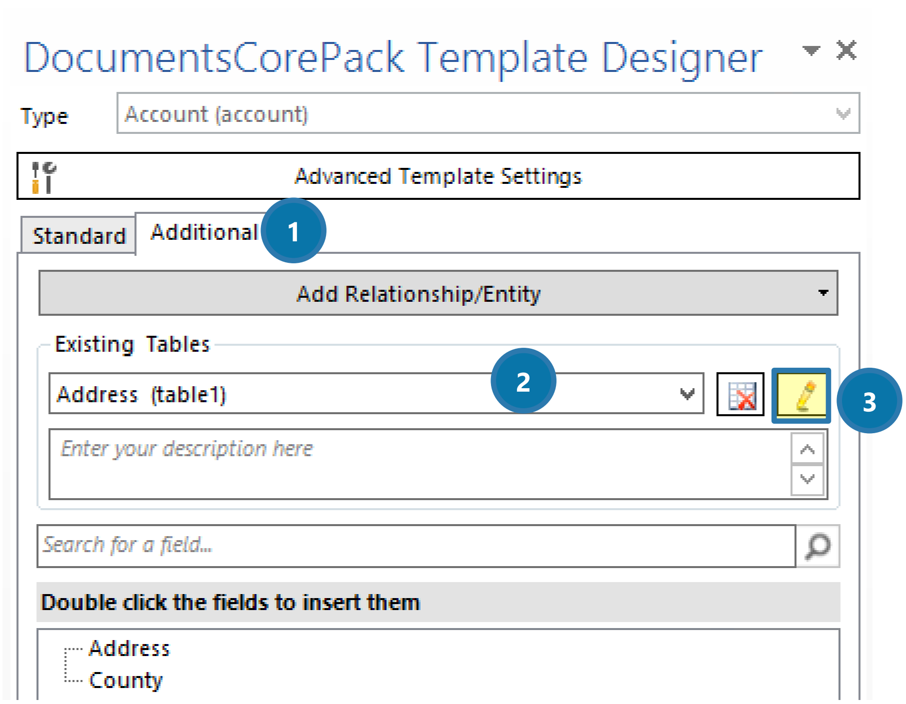


Figure 38 DocumentsCorePack Additional-tab

4.3.2 Configure the *Records to show* – section

In the right loser corner of the *Configure Fields and Datasource*-dialog, you will find the *Records to Show*-section. Here, you have the possibility to select which record to show and how the look up-window should look like.

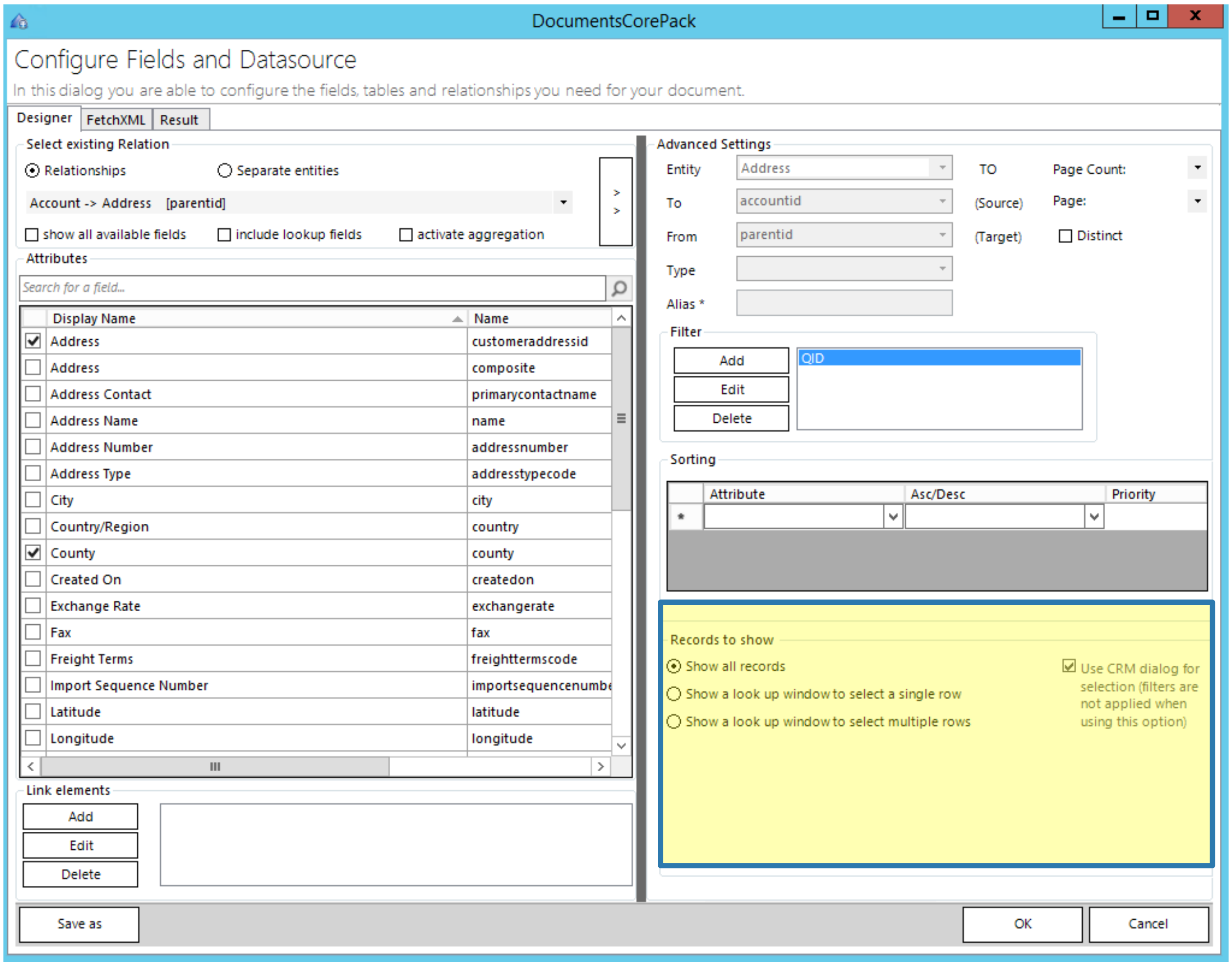


Figure 39 Configure Fields and Datasource-dialog

Simply select your preferred option in the *Records to show*-section and determine the order/width of the columns in the *Sorting*-section. Click on the ***[OK]***-button to save your settings.

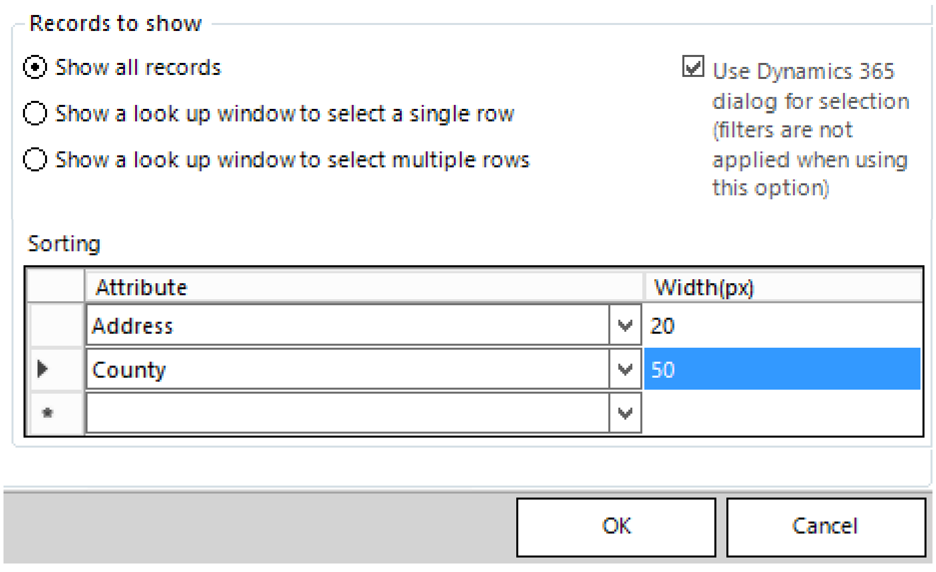


Figure 40 Records to show - section

4.4 How to filter group templates

This feature offers the possibility to set a filter for DocumentsCorePack templates. Templates are filtered based on the template-group they are assigned to.

Applying this feature prevents users from getting confused by a variety of available templates. Once applied, they only see templates related to the corresponding template-group. For further information on advanced group filtering, please have a look at our Server Installation Configuration on our website.

4.4.1 Specification

DocumentsCorePack templates can be organized in groups. These groups are shown as separate tabs in the *Open Template*-dialog and are also available as sub-items in the generate document button.

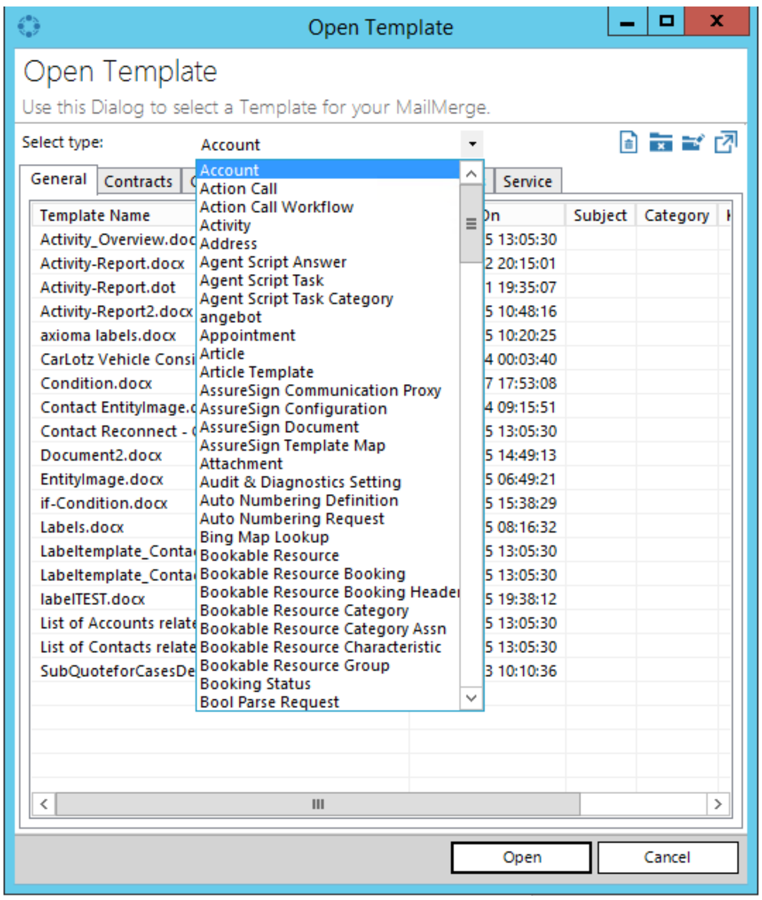


Figure 41 Template groups in the Open Template-dialog

To improve the DocumentsCorePack-usability for end-users, you have the possibility to set a filter for these template-groups in the DocumentsCorePack server configuration. Applying this filter limits the available templates in the template selection menu of a Dynamics 365 record to just one specific template group.
So, users do not get confused with a variety of available templates.

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

4.4.2 Configuration

Start the DocumentsCorePack Server Configuration via the Start pane. *Go to the Command Bar*-tab and click on the ***[Advanced Template Group Filtering]*** – button. For more information on how to get to the Configuration, have a look at this article.

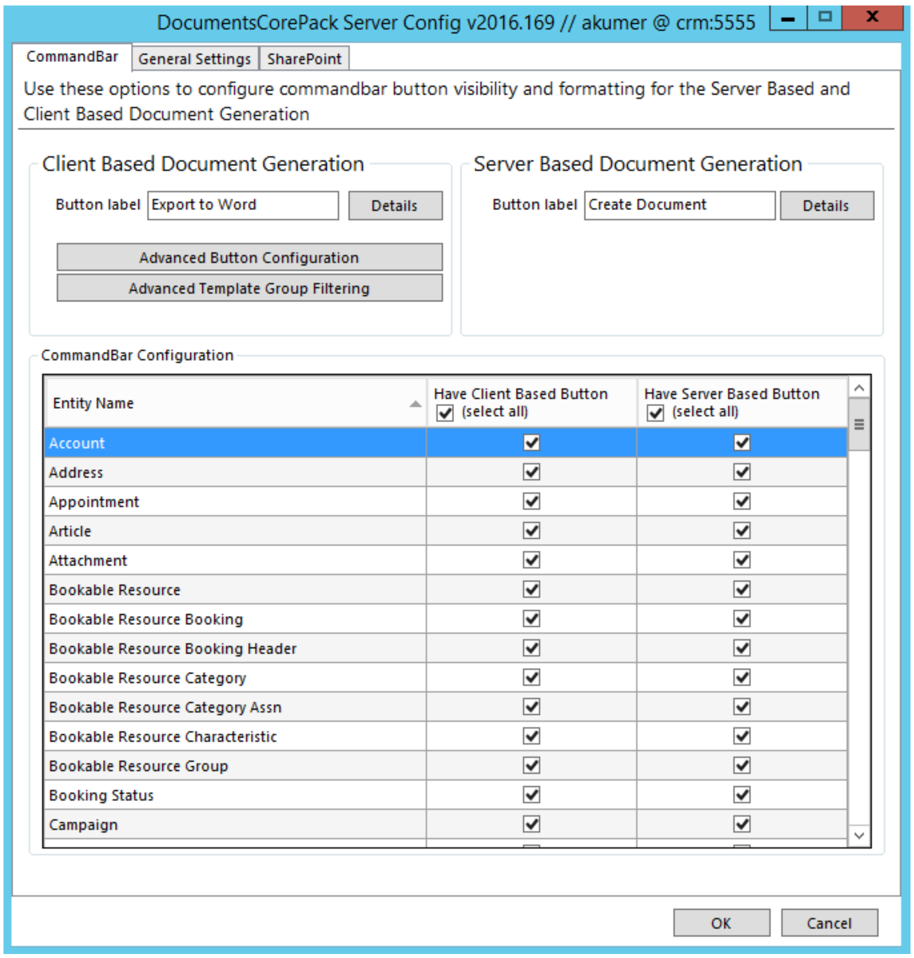


Figure 42 DocumentsCorePack Server Config

After clicking on this button, a new window opens. This window displays all entities that have been configured to show the ***[Export to Word]***-button.

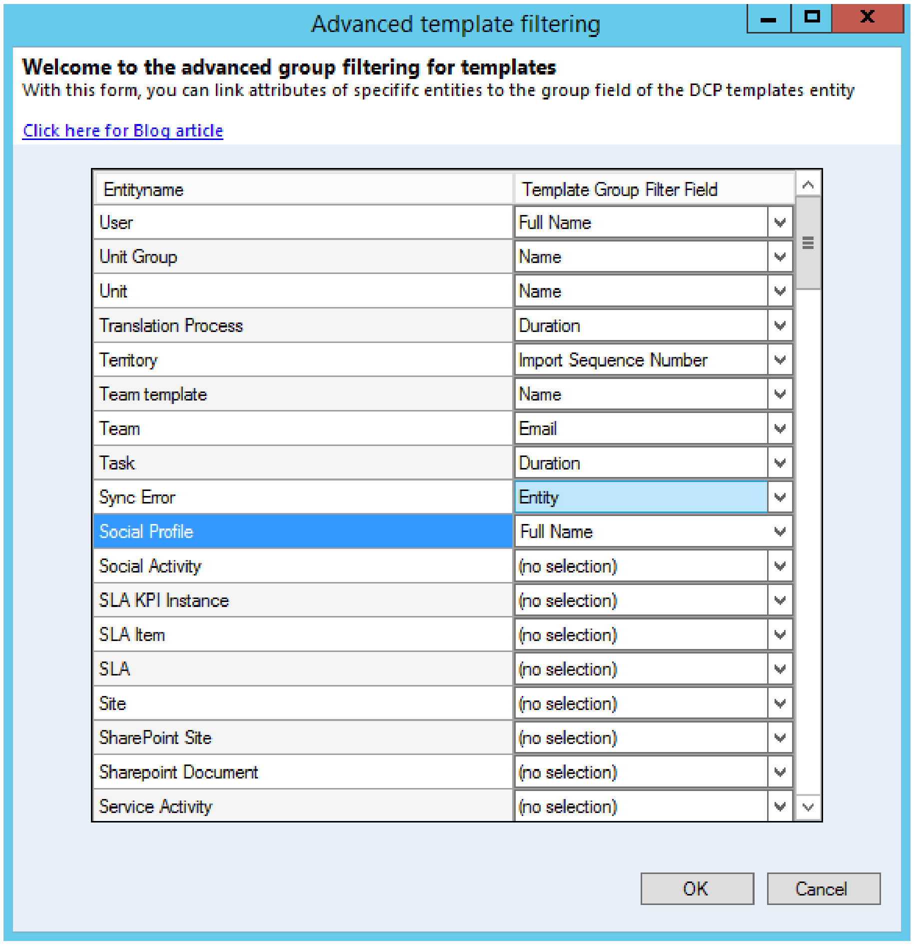


Figure 43 Advanced template filtering - form

Here, you have the possibility to configure the feature for the template-group filtering. To do so, select the entity that should be used to filter the template-groups. Next, select a text attribute of the selected entity.

Click on the ***[OK]***-button to save your changes and do not forget to save your settings!

5 List of figures

6 Contact

For further technical questions, please visit our blog http://blogs.mscrm-addons.com or contact support@mscrm-addons.com.

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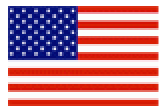

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