Documents Core Pack for MS CRM 2011
User Guide

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www.c360.com

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Users Guide

1.1 Introduction

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

Main Features:

- **WordMailMerge -** Enables creation of Word-Documents with data from MS CRM. It is capable in resolving any entity relationships and works with custom as well as standard MS CRM entities. Therefore DCP provides the opportunity to e.g. create Quotes & Invoices including data from related records like "other contacts", accounts, products etc,…

- **Activity Creation -** Create Letter, Email or Fax activities with the generated content stored back to the regarding CRM record.

- **Send as PDF -** Send documentsas PDF files. DCP can convert generated documents to a PDF format;

- **Document Management -** Provides options to link DCP with MS CRM Sharepoint integration or shared files:

- **Document Summary** - Document Summary can be used to show all documents and records (Cases, qutoes, invoices,..) related to a specific record. E.g. Users can open an account and get an overview of all documents of this account and of all related records.

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

Documents Core Pack-Templates

Documents Core Pack – Templates include predefined fields, so-called mail merge fields. These are references to attributes in the CRM-System (Name of Company, Address, Primary Contact, Mobile phone number…).

It is possible to create templates for each MS CRM – Entity (Contacts, Companies…).

The created templates can then be used to by each user for generating documents.

Sample templates are included in the DCP install. (Quote and Invoice Templates, etc.)

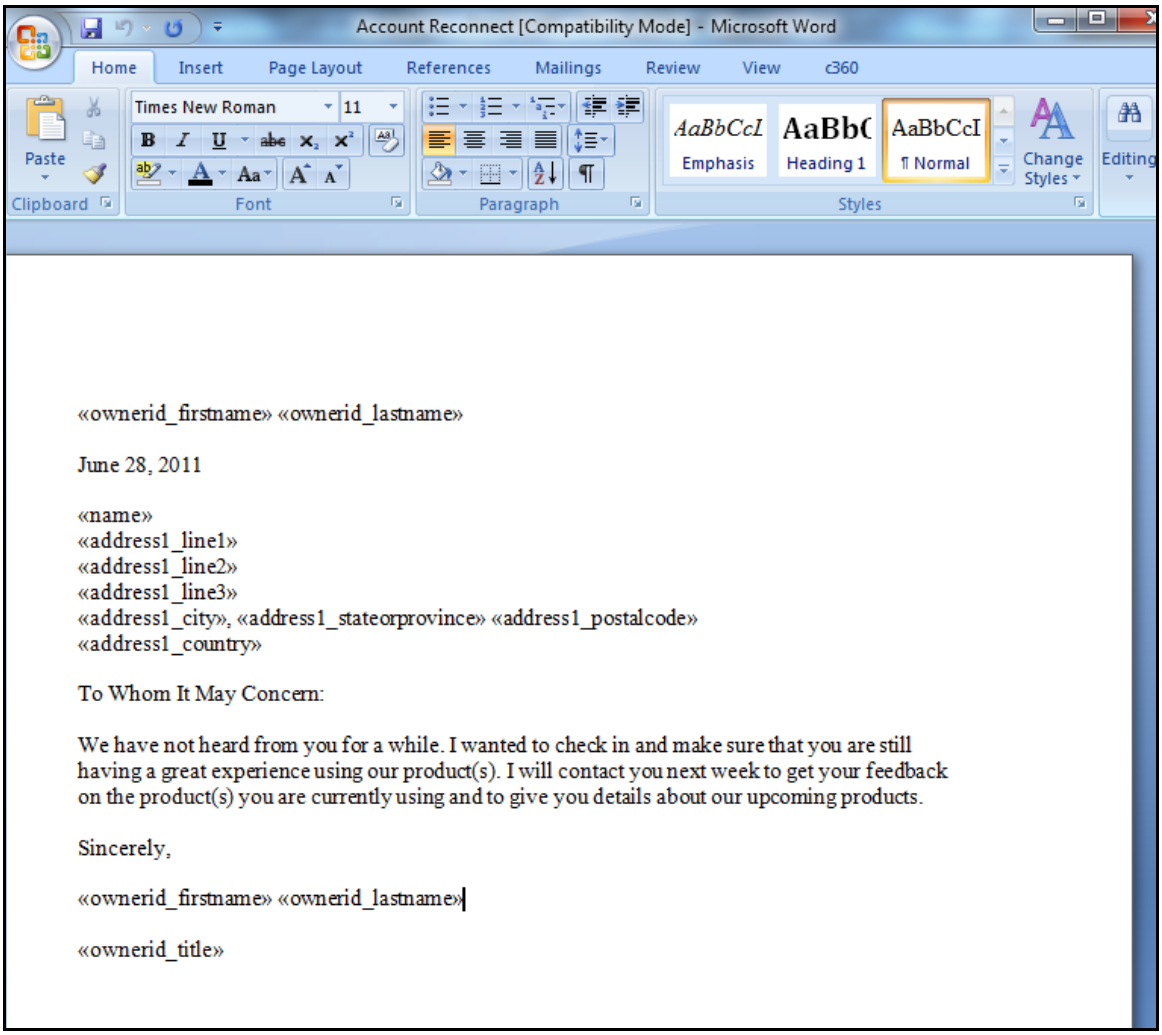
Basically there are two types of templates - "Standard" and "Office Open XML". The following comparison illustrates the main differences.

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

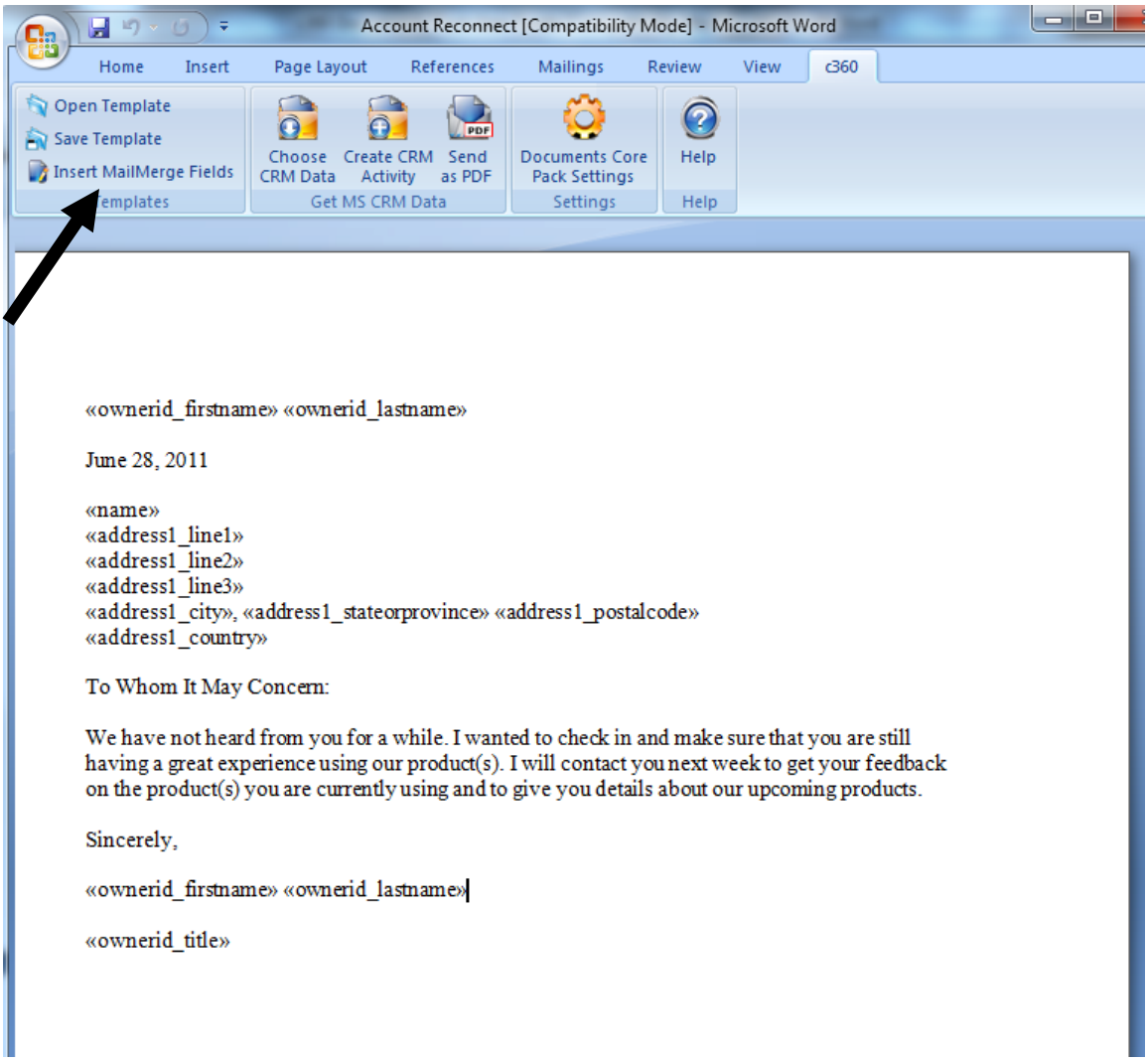
2.1 Standard Templates

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

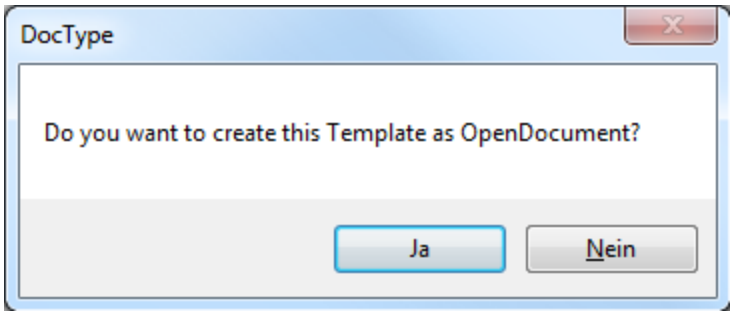
1. Start Microsoft Word.
2. Write or open a document with the required content.



3. Add MS CRM Fields. To do this click the c360 tab on the Word Document, then select the " Insert Merge Fields" option in the toolbar.

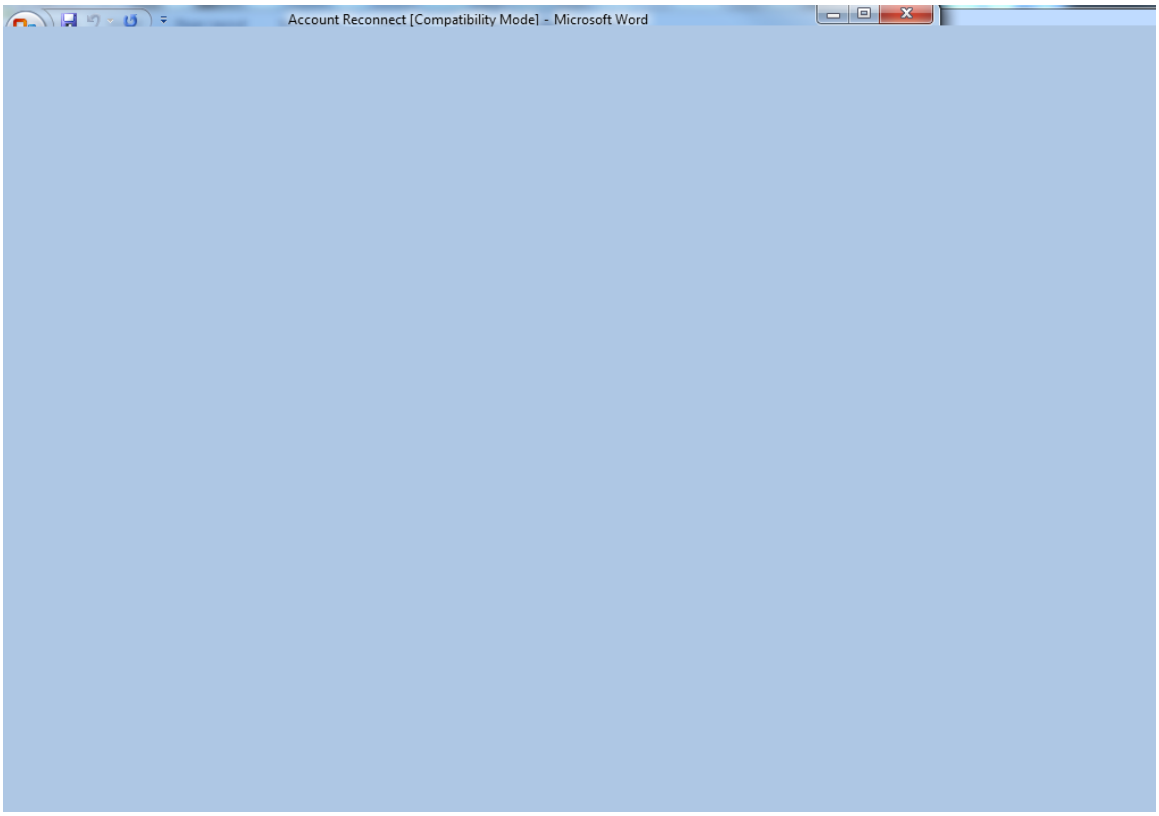


4. The following Message will appear:



Press [No] to proceed creating the standard template.

5. The following Taskbar will appear:

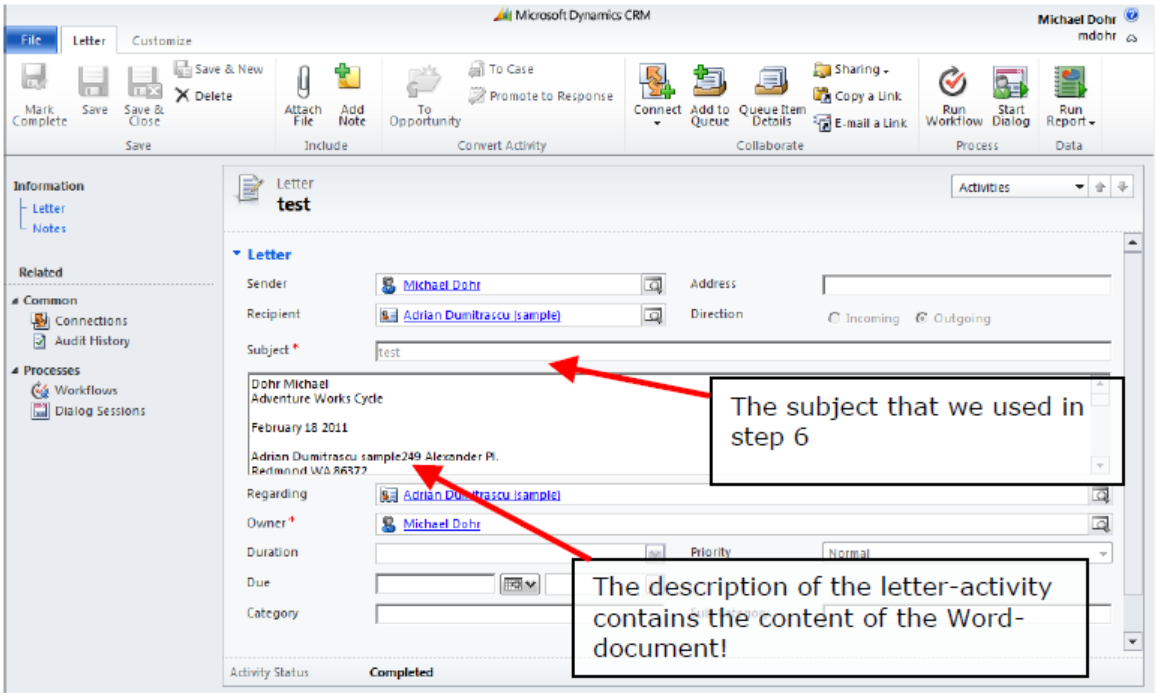


First choose the primary entity of the template you want to create [Select Type].

There are specific CRM-Attributes and different form letter-fields for each entity. If "Contact" is selected, DCP will make available all fields and related entities of the entity "Contact". We have chosen "Account" as the "Select Type" for our example.

With a double click on the various fields or by selecting specific fields and clicking on the button [Add] the selected fields are inserted into the template. At the bottom of the list of Account Attributes, you can open related entities click on thier attributes as well.

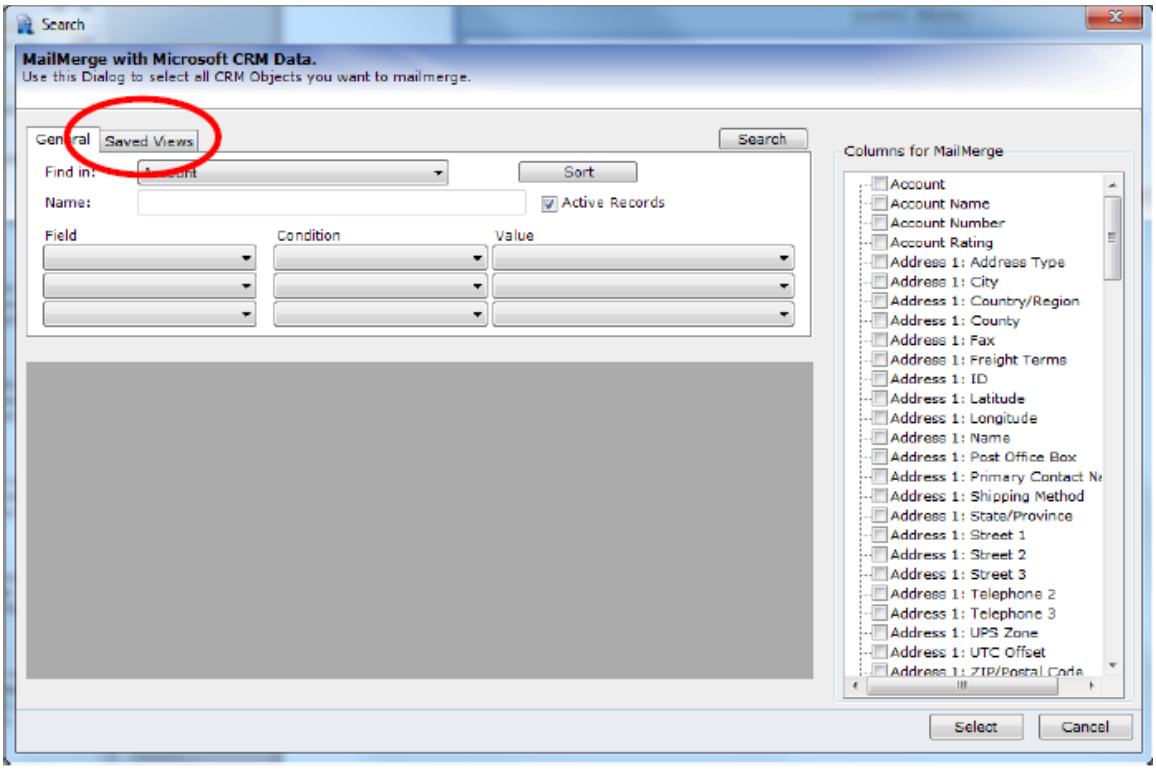
6. Save the Template
[Documents Core Pack for MS CRM] -> [Save Templates]



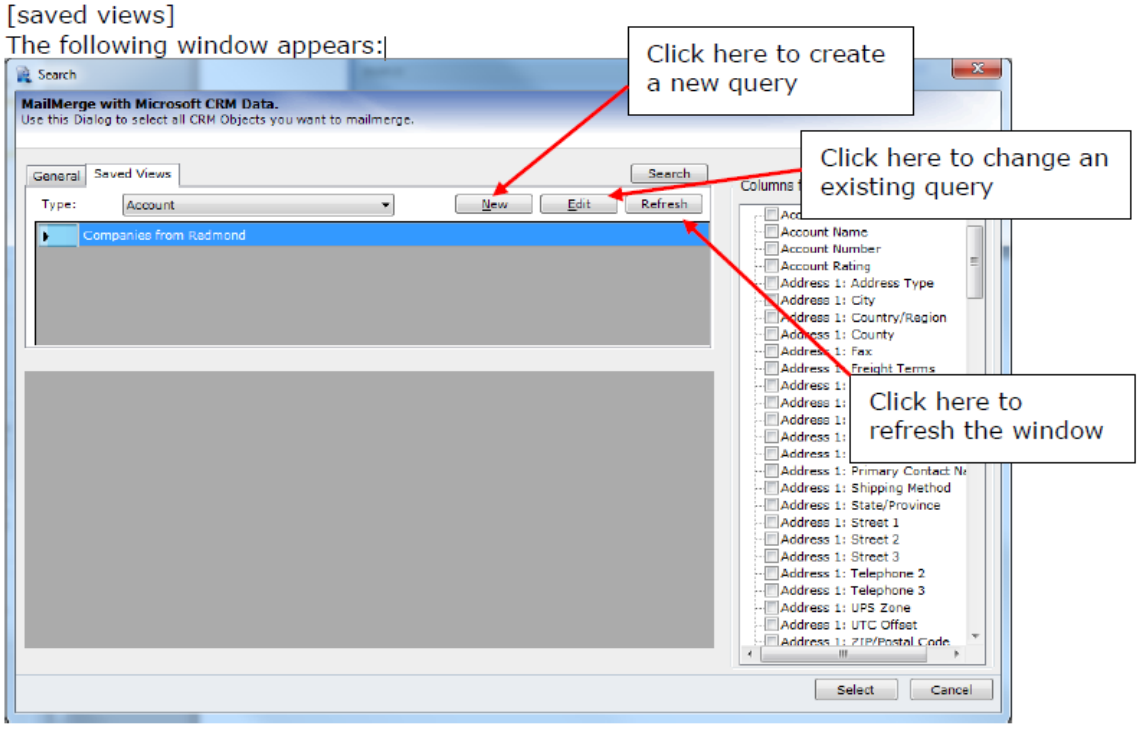
8VLQJ 6DYHG 9LHZV´ WR FKRRVH GDWD

Step 1: Click on [Choose CRM Data]

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

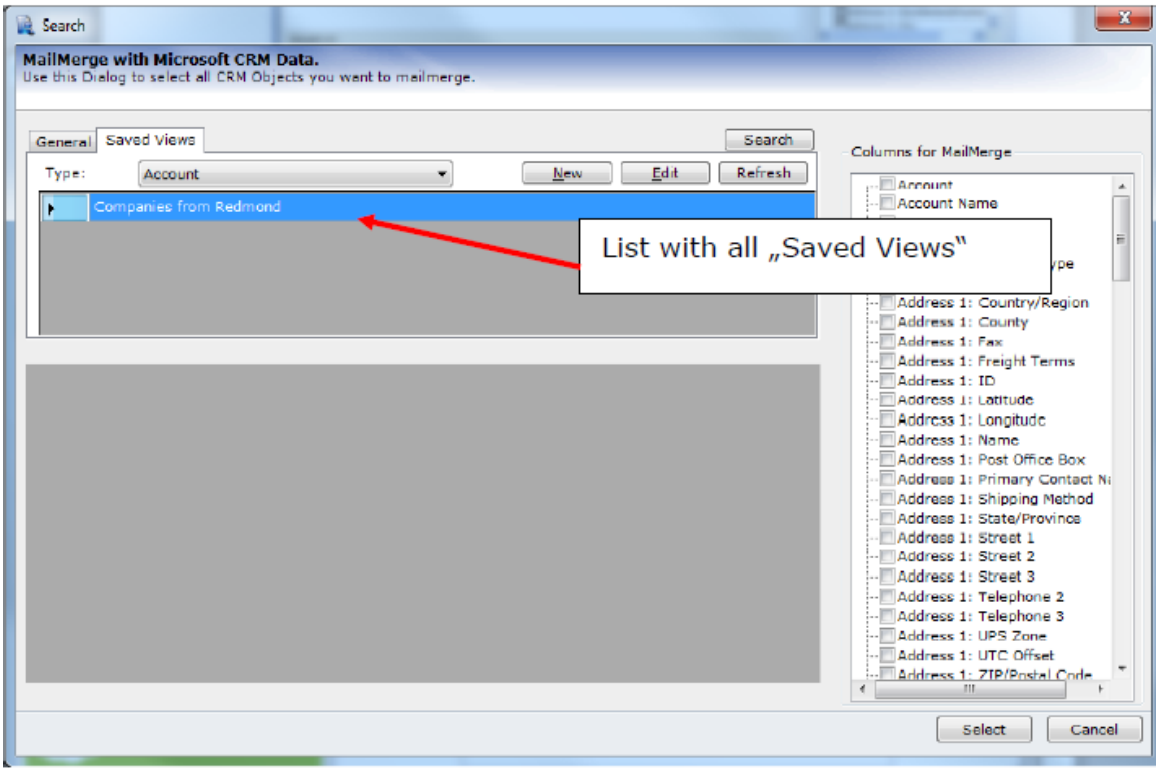


To choose the records by using saved views, we have to change to the register [saved views]
The following window appears:



Step 2: Choosing the view

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



The results will appear, we can choose the records we want to use and go ahead by clicking on the [Choose] button. DCP will now load the data to Word as described in chapters 3.3 and/or 4.1

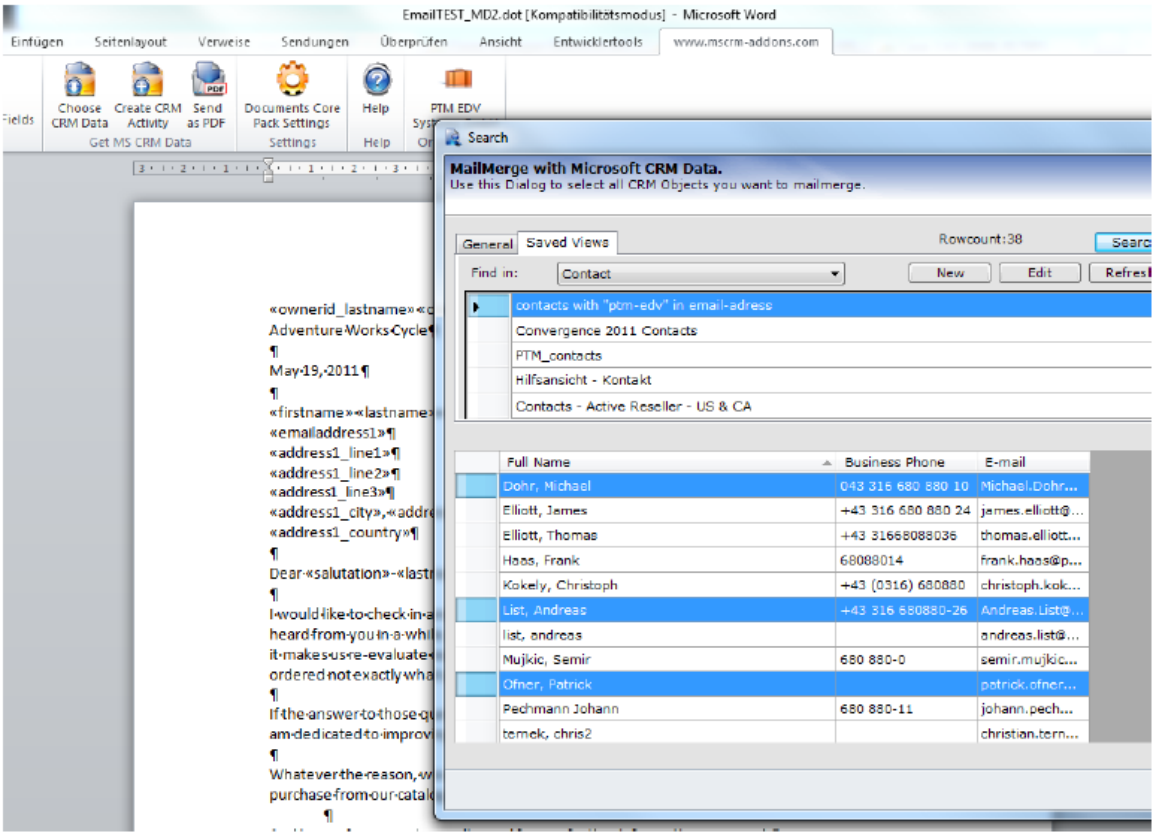
5 Sending Mails via Outlook

This chapter explains how DCP can be used to send emails containing the generated document.

5.1 Open template and load records

First we have to choose a template we want to use and load the CRM-records (contacts, accounts,…) that should receive the email. Therefore we have to "Perform a mail merge with many records" as described in chapter 4.

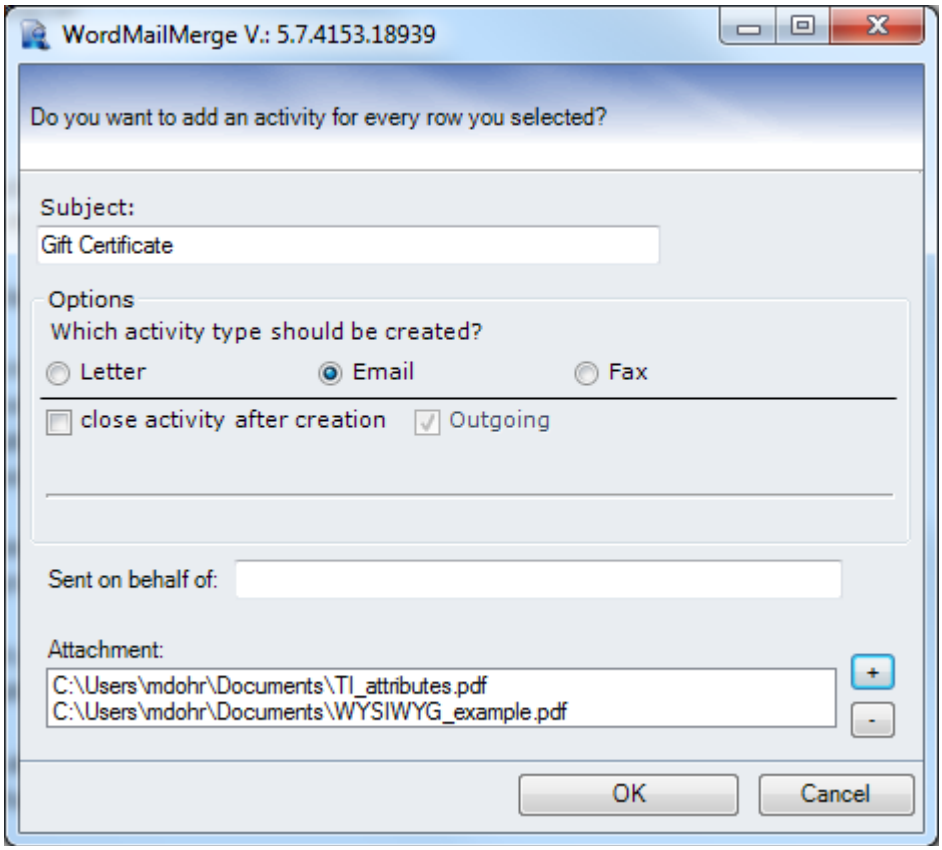
In our example we use the "Gift certificate"-template that comes with the installation and select 4 contacts.



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

5.2 Create e-mail activity

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



Subject: Subject of the created Email

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

Attachment: Allows to add some attachments like Terms & conditions or any other document.

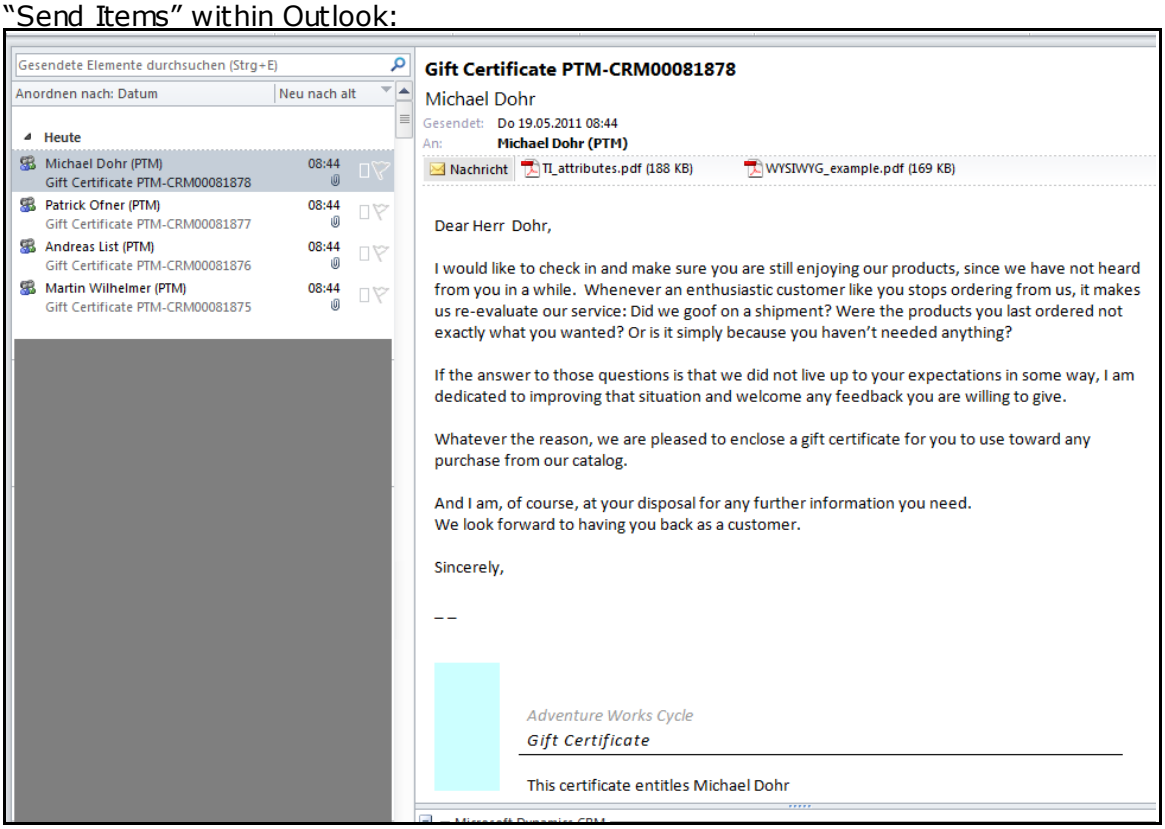
So in our example we are sending the "Gift Certificate" mail including 2 files to 4 contacts

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

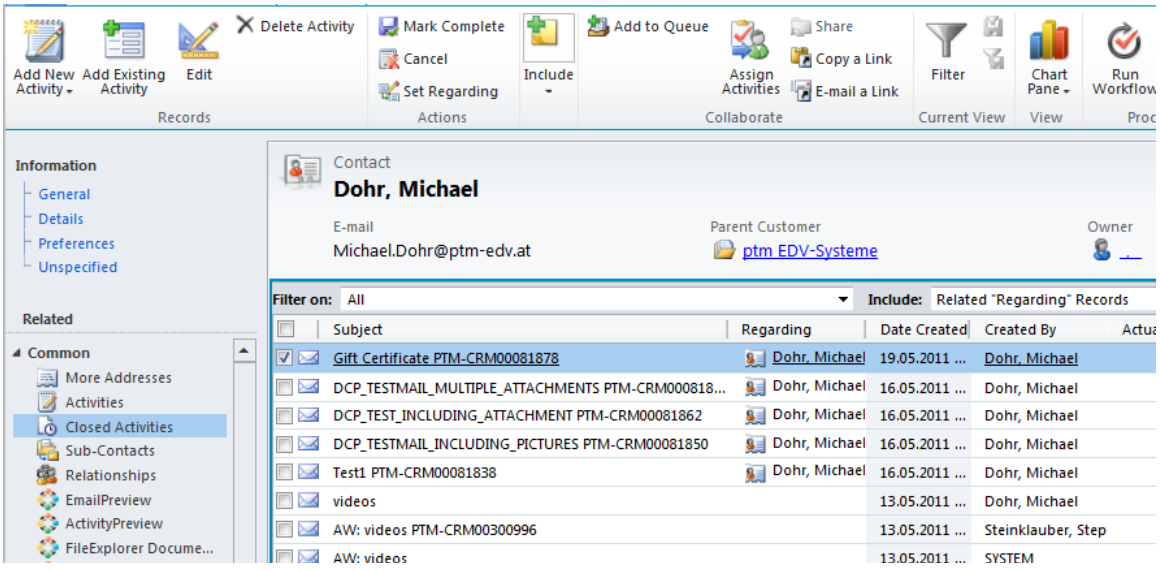
5.3 The Result

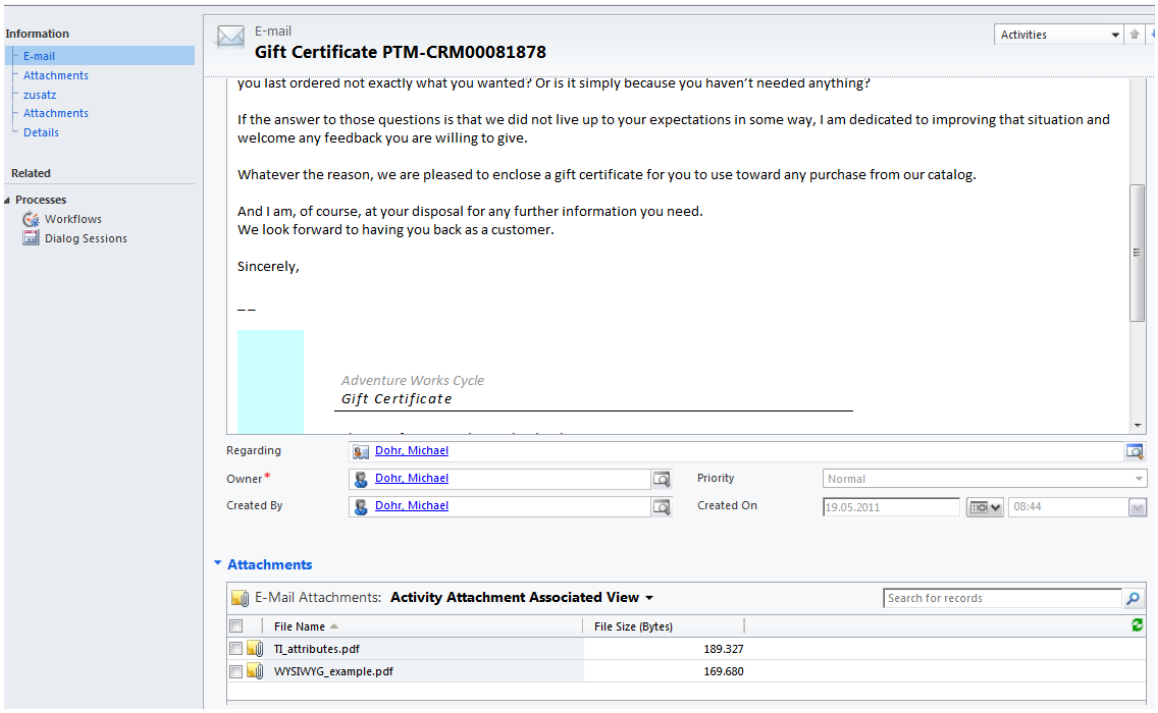
After hitting the [OK] button, Outlook will start sending the mails. Depending on the size of the document and number of attachments, this could take up to 3 seconds per mail.

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



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



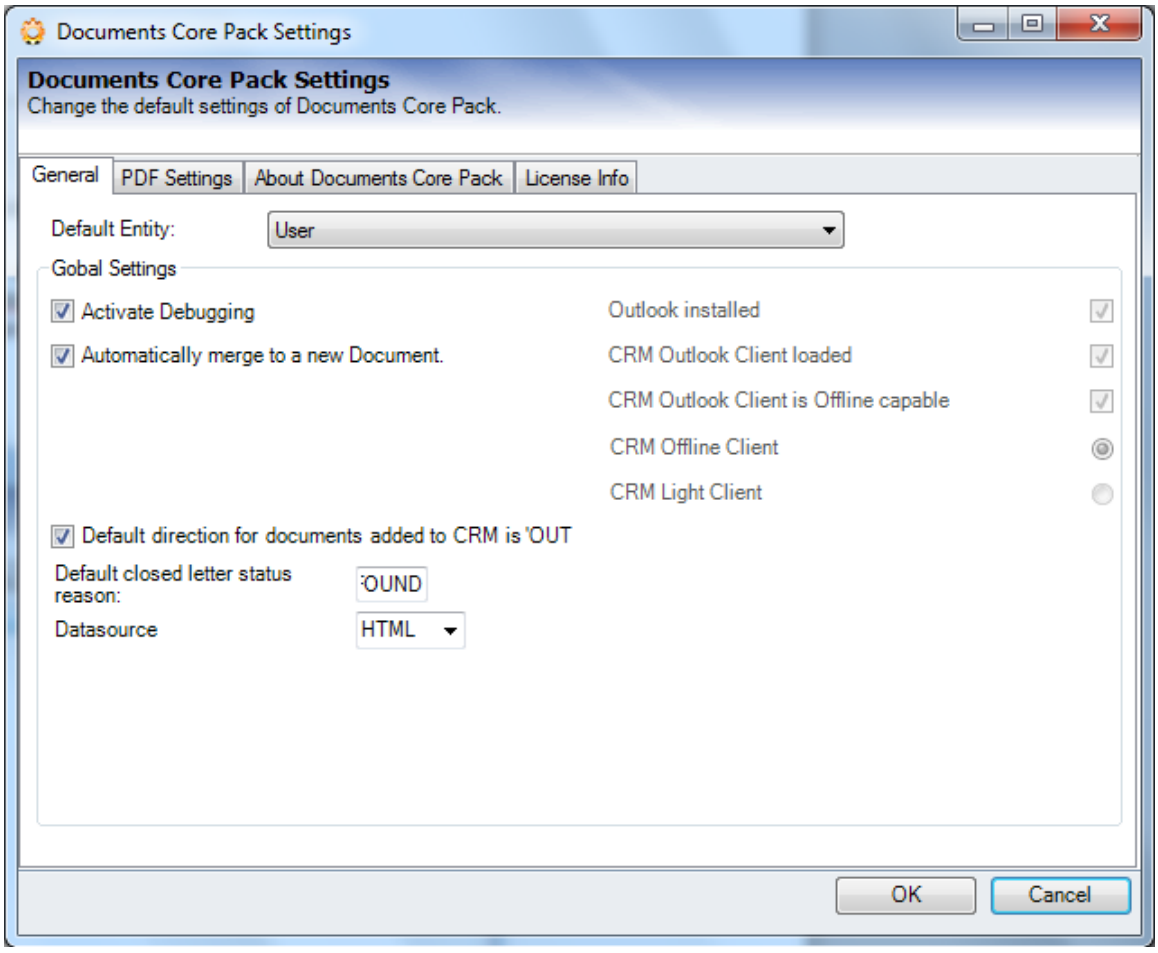


As you can see in the screenshot, the content of the mail appears in the "description" field of the activity and both files are attached.

6 Documents Core Pack Settings

This chapter explains the settings of the DocumentsCorePack-Client
In most cases the default settings will fit the user's requirements.

6.1 General Tab



Settings:

- Activate debugging: required for support-issues only. The log-files contain detailed descriptions about what was happening in case of errors. As logging always comes with a decrease in performance, you should leave this setting deactivated unless asked by a mscrm-addons- Support team member to activate.

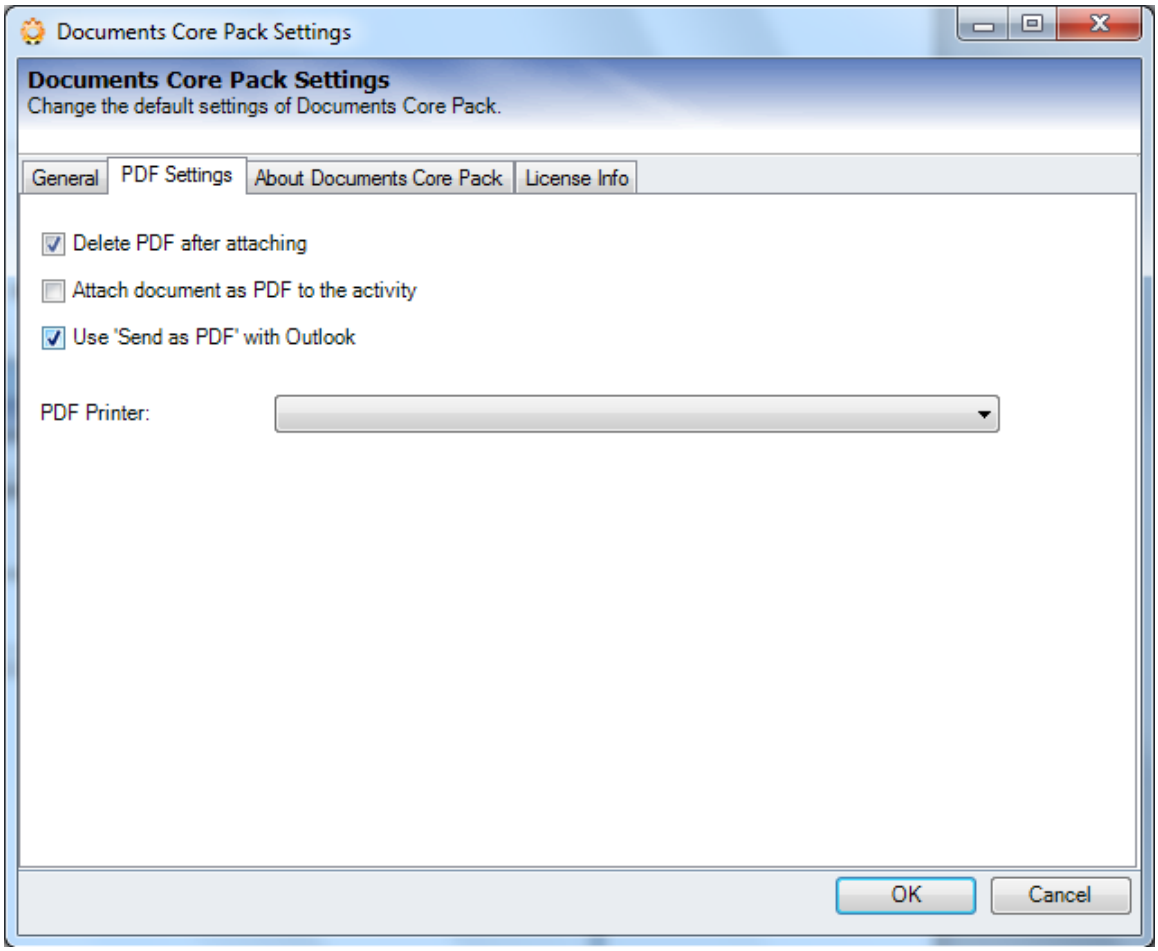
- Default direction for documents added to CRM is "Outgoing": Defines the default direction for created activities (letter, fax)

- Automatically merge to new Document: When checked, a new document will automaticall be generated once the data is loaded. (e.g. after hitting the Print in Word button on a quote).

- Datasource: Choose the datasource that should be used for storing temp data.

6.2 PDF Settings

Contains some basic settings regarding the "send as PDF" – functionality (see chapter 3.4)



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

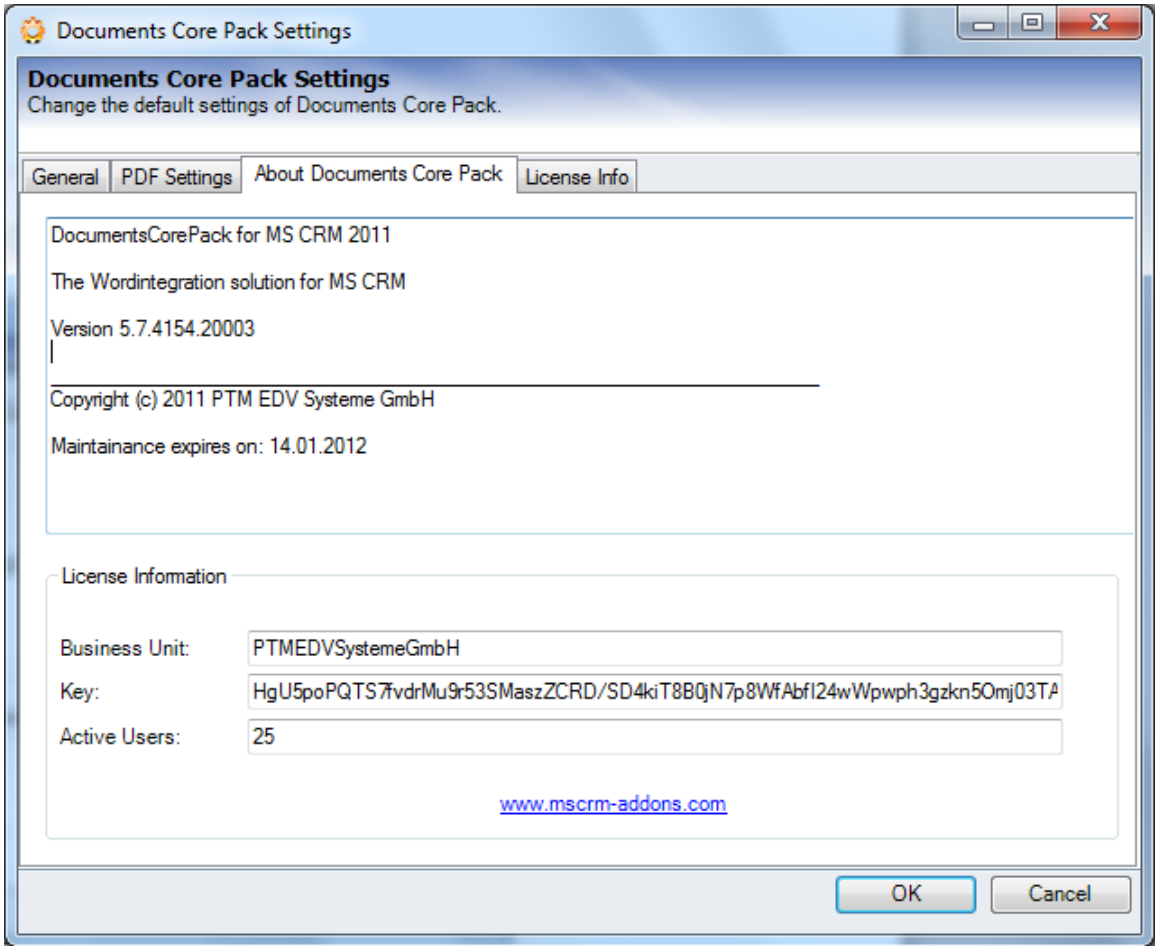
- PDF Creator

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

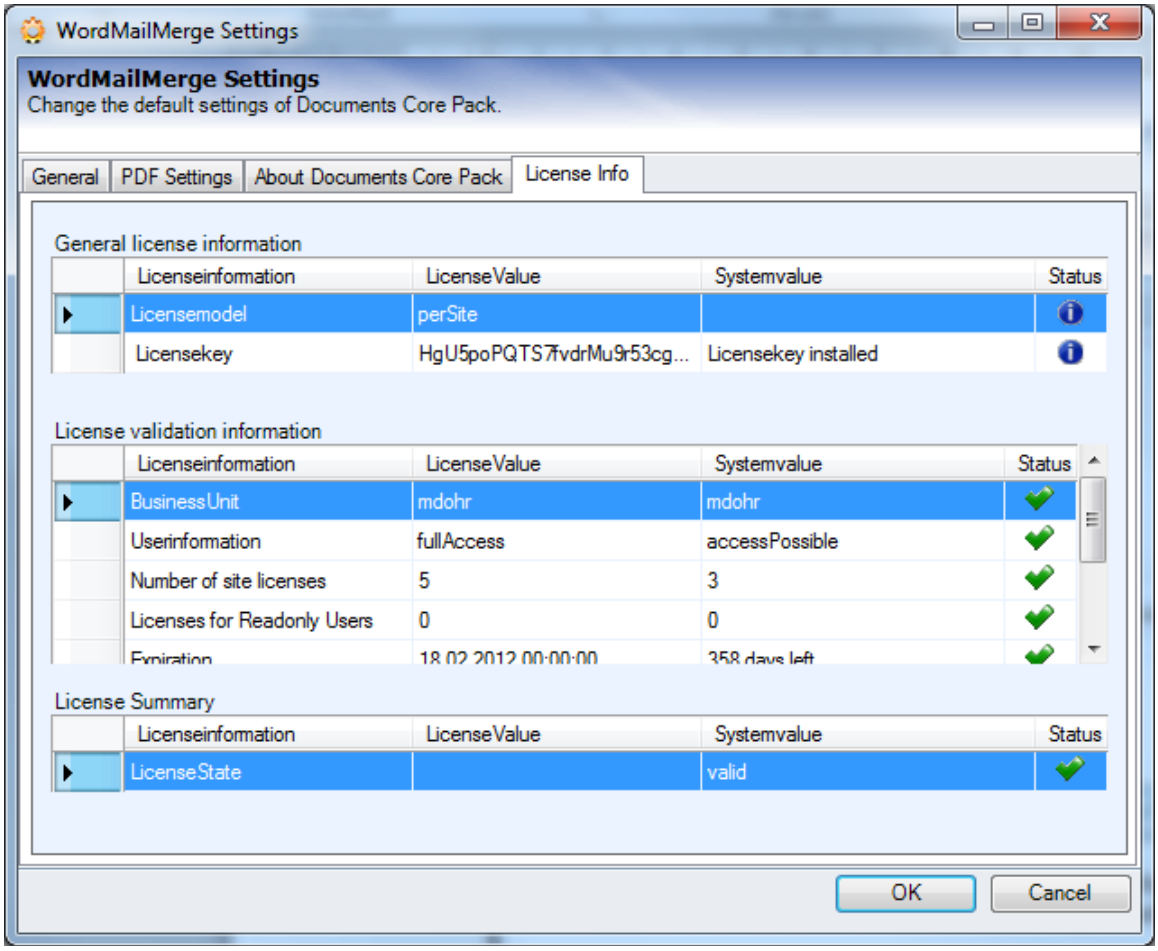
- Attach document as PDF to the activity: By default the document will be saved as a *.doc file when using "Create CRM activity" (see chapter 3.3). This setting enables to save PDF files instead

- Use "Send as PDF" with Outlook: If checked, the document generated by the "send as pdf" routine (see chapter 3.2), will be attached to an email in Outlook instead of an email activity.

6.3 About DocumentsCorePack / License Info



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



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

7 Document/Template Properties

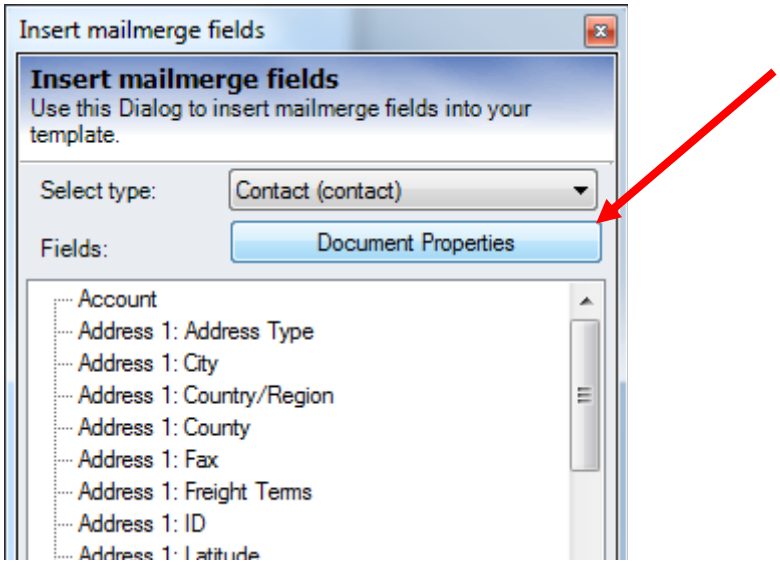
Document Properties are template – specific settings that improve the use of the templates by predefining things like:

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

How to access the document properties:

Open your Template and select "*Insert MailMergefields"*. A dialogue as described in chapter 2.1 appears.

Click on [Document Properties] to access the document properties.



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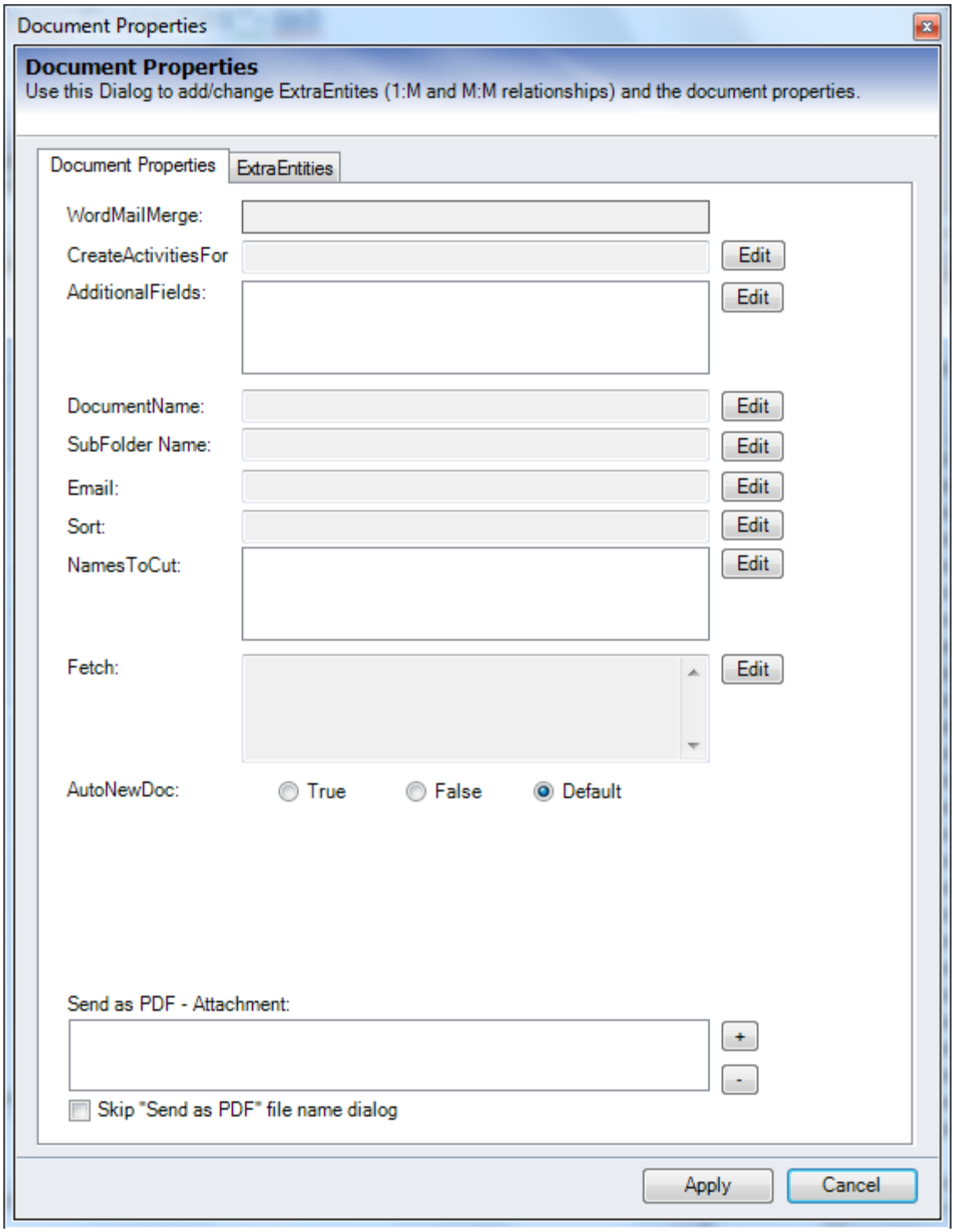


To change any DCP-Property please use the [Edit] Button!

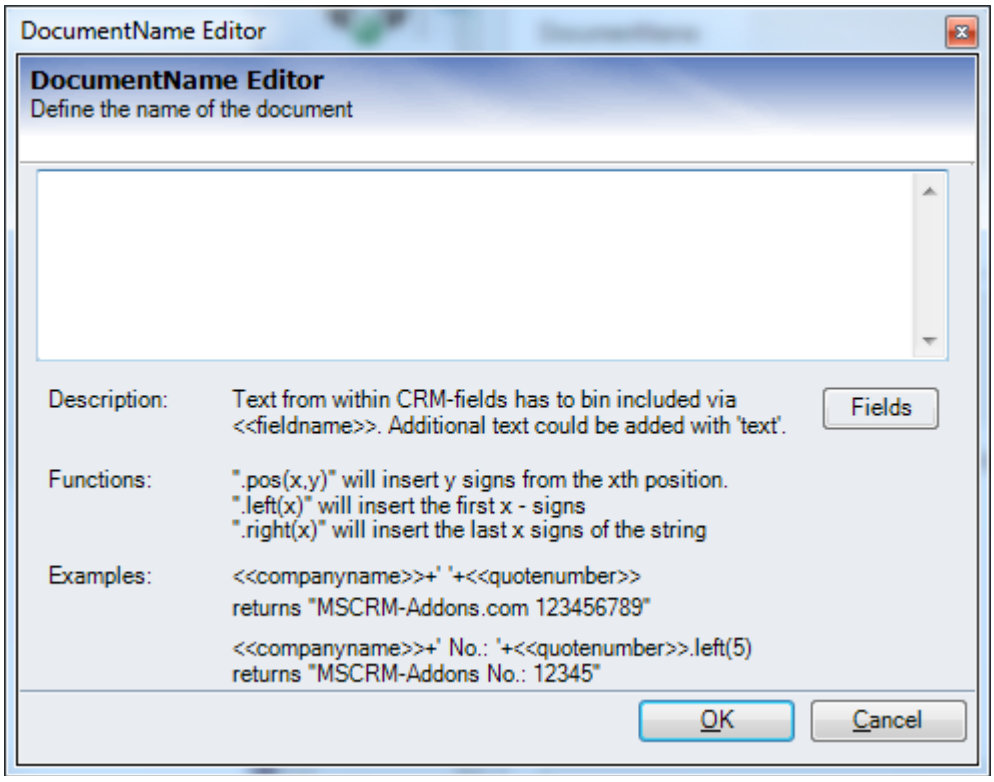
Settings:

- **WordMailMerge**: Displays the CRM entity the template belongs to (e.g. account)

- **CreateActivitiesFor**: If you don't want to add the activity into the Main-Entity (e.g. you are merging a marketing list and want to save the activities to the contacts or accounts from in the marketing list.) Syntax: Entityname, primarykeyfield. e.g.: contact,contact_contactid -> In this case the activity will be saved to the contact.

- **Additionalfields**: to read out additional fields (attributes) which are not defined in the document this means that those fields are loaded into the template automatically (e.g id fields, etc..). For to send emails via Documents Core Pack and you don t want the email adress to be shown on the template.

- **DocumentName:** Here it s possible to predefine the name of the documents generated with this template. It s possible to use data from Fields out of CRM to be part of the document name. (e.g. Company+Quotenumber.doc)



Functions:

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

-

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

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

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

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

AutoNewDoc:
If you just select one Row (of Contact, Account, a.s.o.) DCP automatically merges your Template into a doc. Sometimes you don't want DCP to do so for e.g. if you want to send it as an email. Then set this Property to **false**. Values: true, false, default (setting is overtaken from the Documents Core Pack settings)

Send as PDF Attachment:
Here it s possible to define static attachments that should be added to the email activity. E.g. add a "Terms & conditions.pdf" when sending a quote as a pdf.

Skip Send as PDF Filename dialog:
Allows to skip the SaveFileDialog when using the "Send as PDF" functionality.

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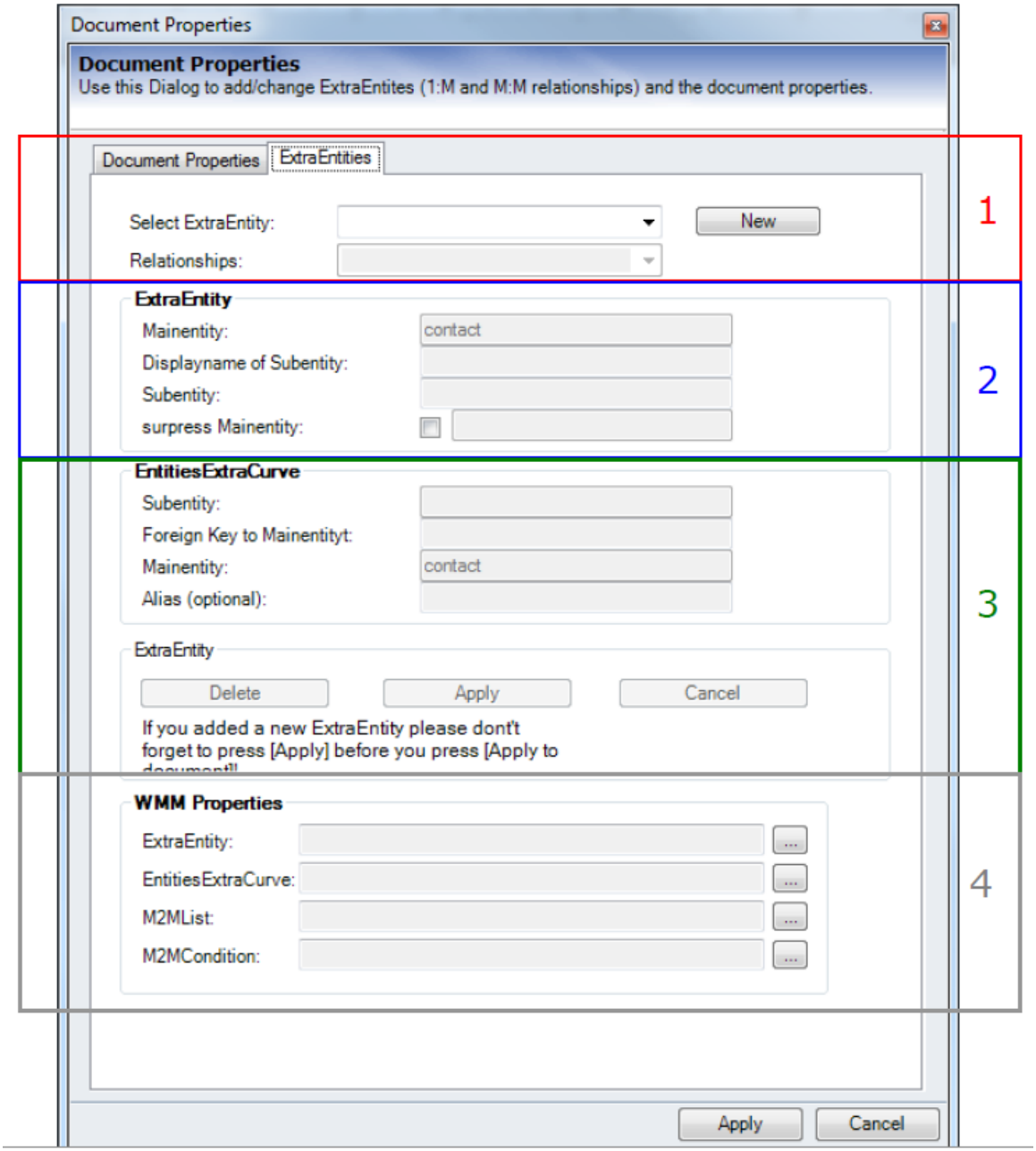
This tab is used to resolve One – to – Many relationships. (It's possible to create M:M relationships too, but this is quite complex and requires help from our support team members)

Basically this tab is seperated into 4 areas:



1. Select / Create relationship

In this section its possible to select an existing Extra Entity by choosing one out of the Listbox. To create a new one press [New] and select one of the given Relationships in the drop-down listbox. Its also possible to create a new relationship from scratch (only for enhanced Users). After this you are in the "edit-Mode", this means that the tree button [Delete], [Apply] and [Cancel] are now active and also some Fields from the sections below are active.

2. Groupbox ExtraEntity

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

3. Groupbox EntitiesExtraCurve

- Subentity: the Entity you want to show additional in your Tree
- Foreign key to Mainentity: the Attribut which is the Key to the Mainentity. (in XML: Referencingattribute)

After you have filled in all the fields you can press [Apply] to add this 1:M Realtionship

4. DCP Properties Groupbox

- ExtraEntity: This DCP-Prop is used to show the additional Entity in the Tree
- ExtraEntityCurve: This one defines how the Data is fetched out of CRM
- M2MList: This is to create/add M:M Relationships by hand!
- M2MCondition: Field to add special Conditions to M:M relationships Users guide

8 Save Locations (Sharepoint/FileShare)

This chapter contains a detailed description about how to predefine SaveLocations for generated documents with the "Document Properties" (chapter 6).

e.g. It is possible to define a quote template to automatically save it into the "Parent-customer"-share with the Quote-number as the filename.

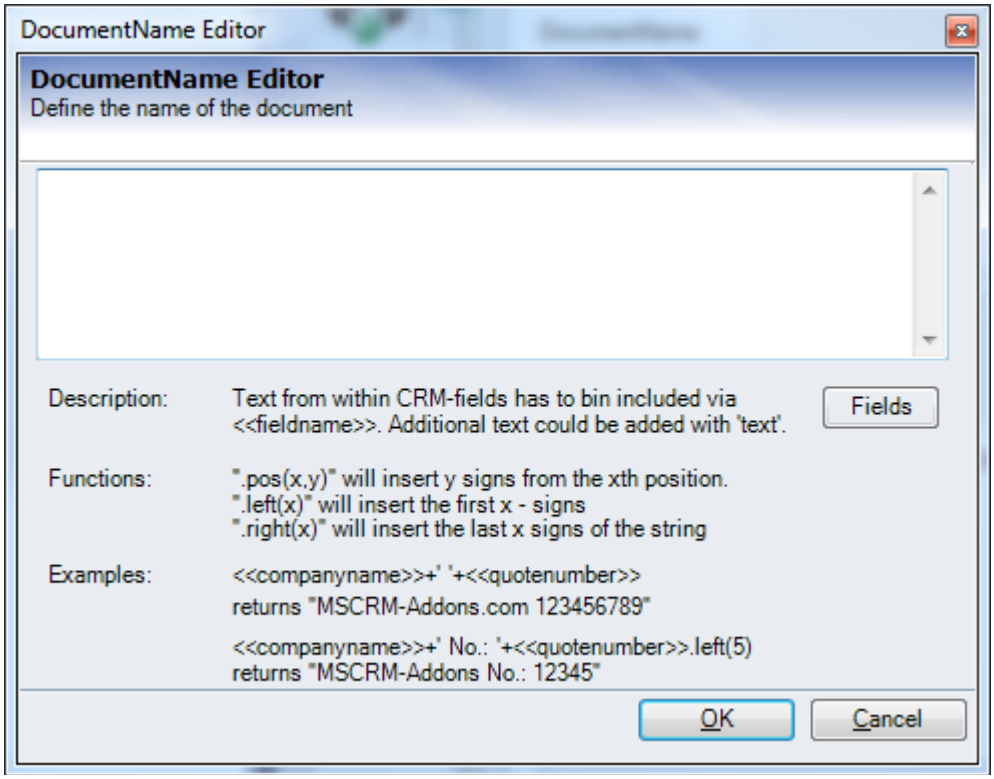
The path to which merged documents are saved depend on two settings:

1) Documents Core Pack Server Configuration (Server)

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

2) Document Properties (Client)

In the document properties of the template (see chapter 6.1), you can find a setting called "**SubFolder Name**" which allows you to specify a subfolder for the created document.
With a click on [Edit], you ll see the following window:



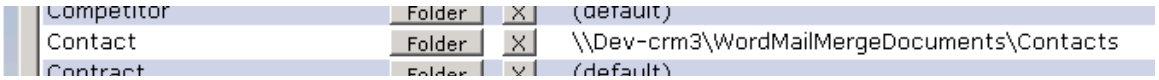
Please see (*DocumentName in chapter 12) for a detailed description on this editor.

Examples:

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

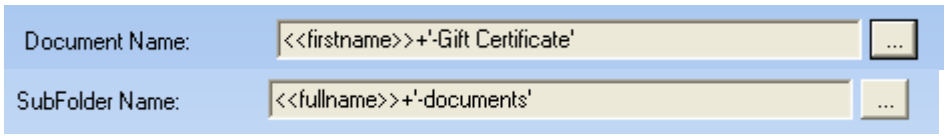
Server-Settings

The gift certificate is a template for the Contact entity, so the Fileshare/Sharepoint –root will be taken from the depending servers setting:

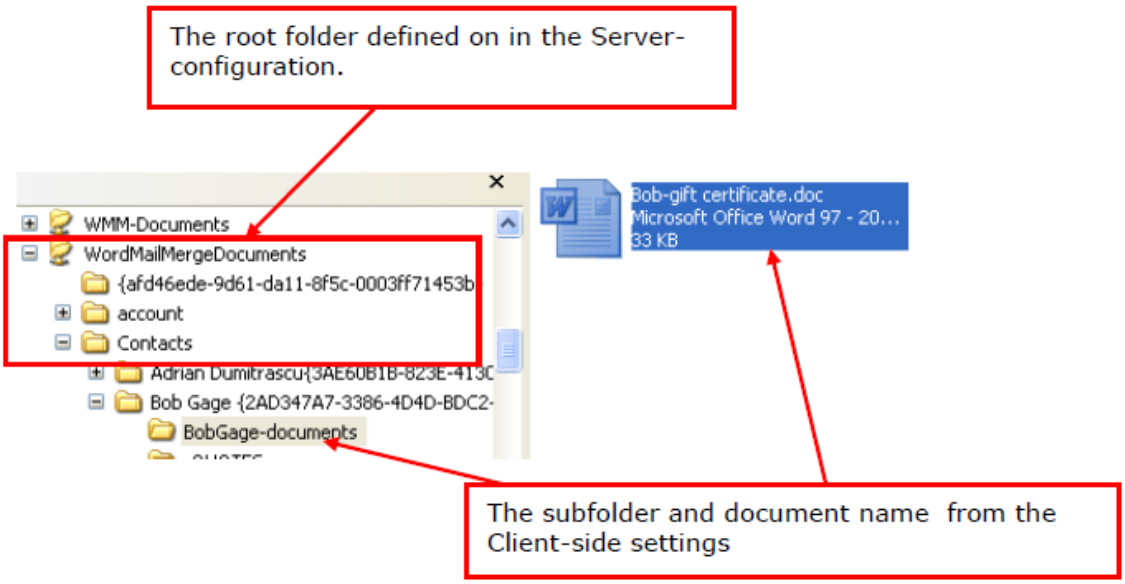


Client-Settings:

In the Document-Properties, we can define a subfolder-name and a document name for the created Gift-certificate.



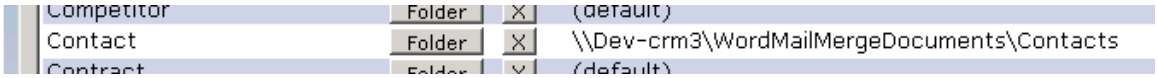
Result:
The settings described above result in following document path on the fileshare.



2. Generate a quote and save it to the PrimaryContact on the FileShare.

Server Settings:

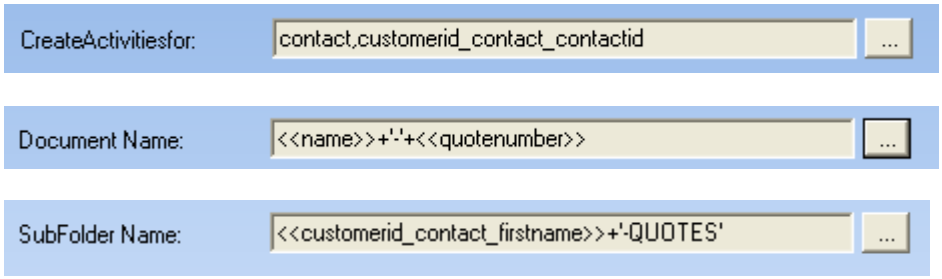
As the document will be created for the entity "Contact", the root folder will be taken from the Contact-Setting rather than the Quote-setting in the Documents Core Pack Server configuration.



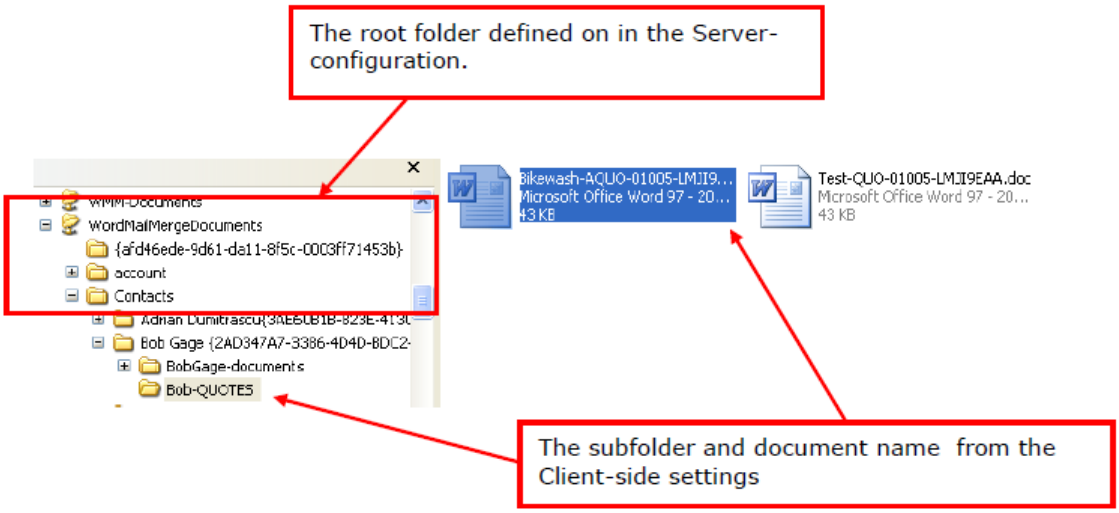
Document Properties:

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

Therfore the client side settings have to look like this:



Result:



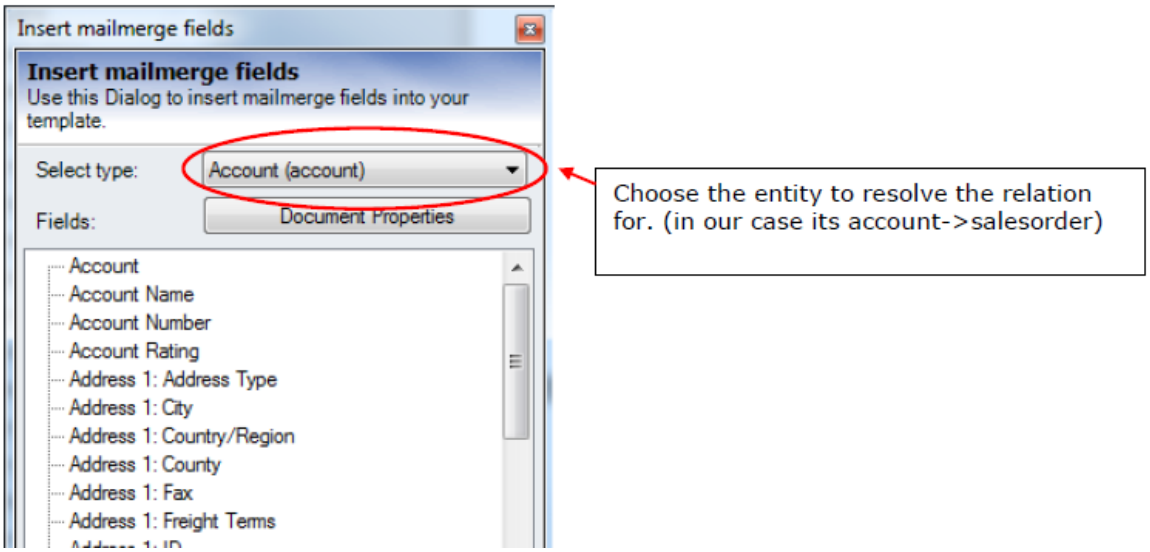
NOTICE: This operations are equal on the Sharepoint!
(see Implementation GUIDE 1.5.4)

9 Resolve an Additional Relationship

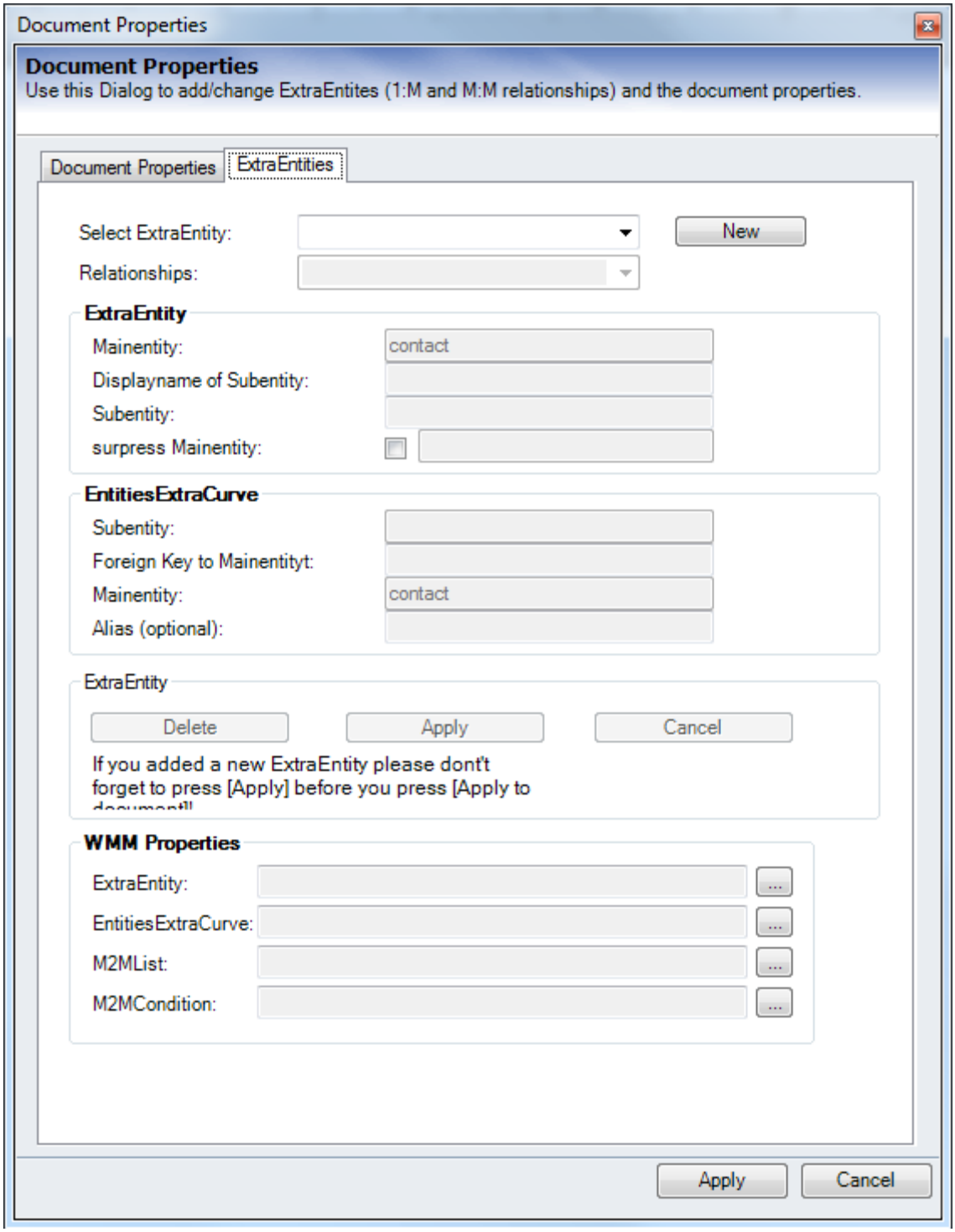
With the option to define "One to Many" and "Many to Many" relationships its possible to link entities together and load data from both into the MS Word document.

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

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



Step 2: After that, we proceed with a click on "Document Properties" and switch to the "Extra Entity Tab" (see chapter 6.2)

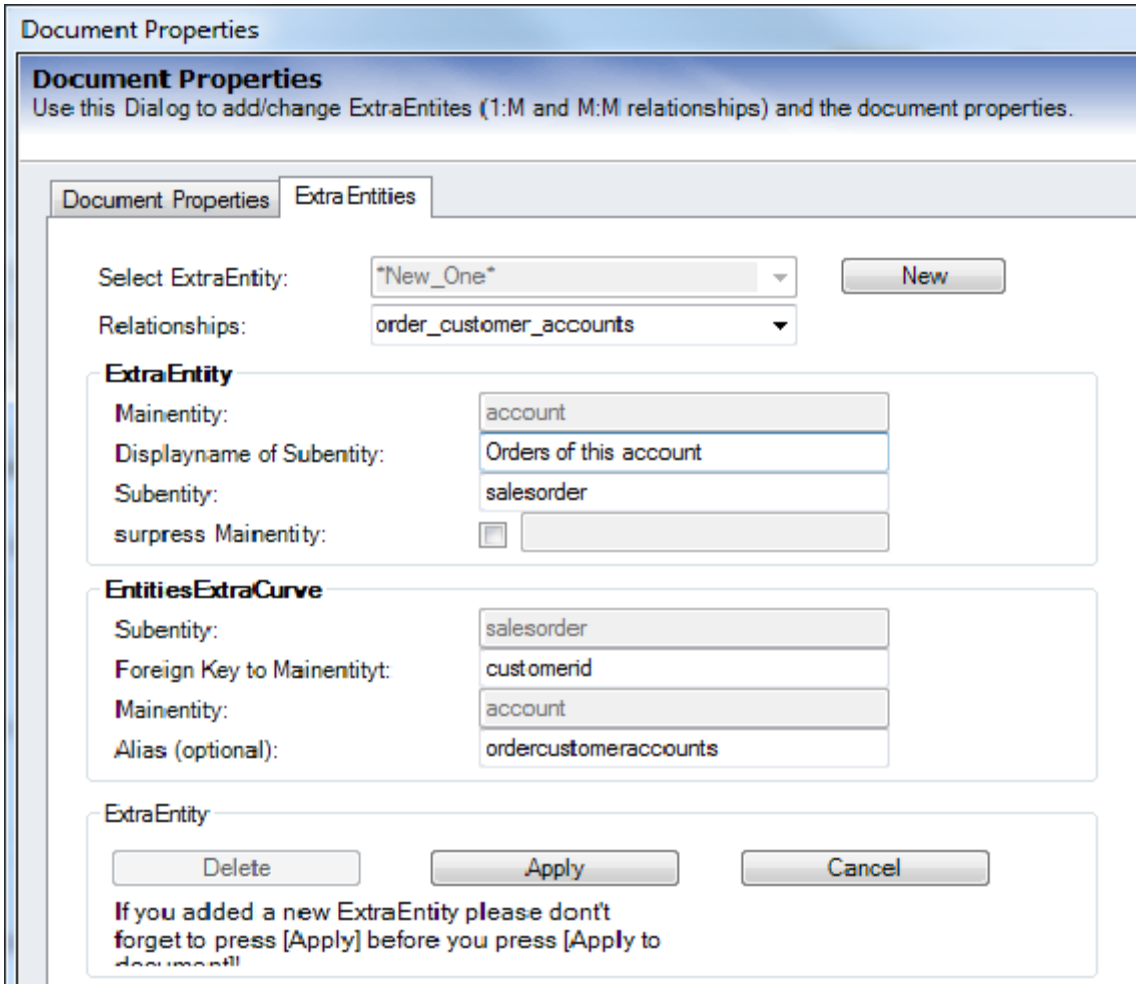


To add a new relation we need to chooce the Entity/Relation we want to add. Therefore we proceed with a click on "New".

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

Step 3: Choose relationship

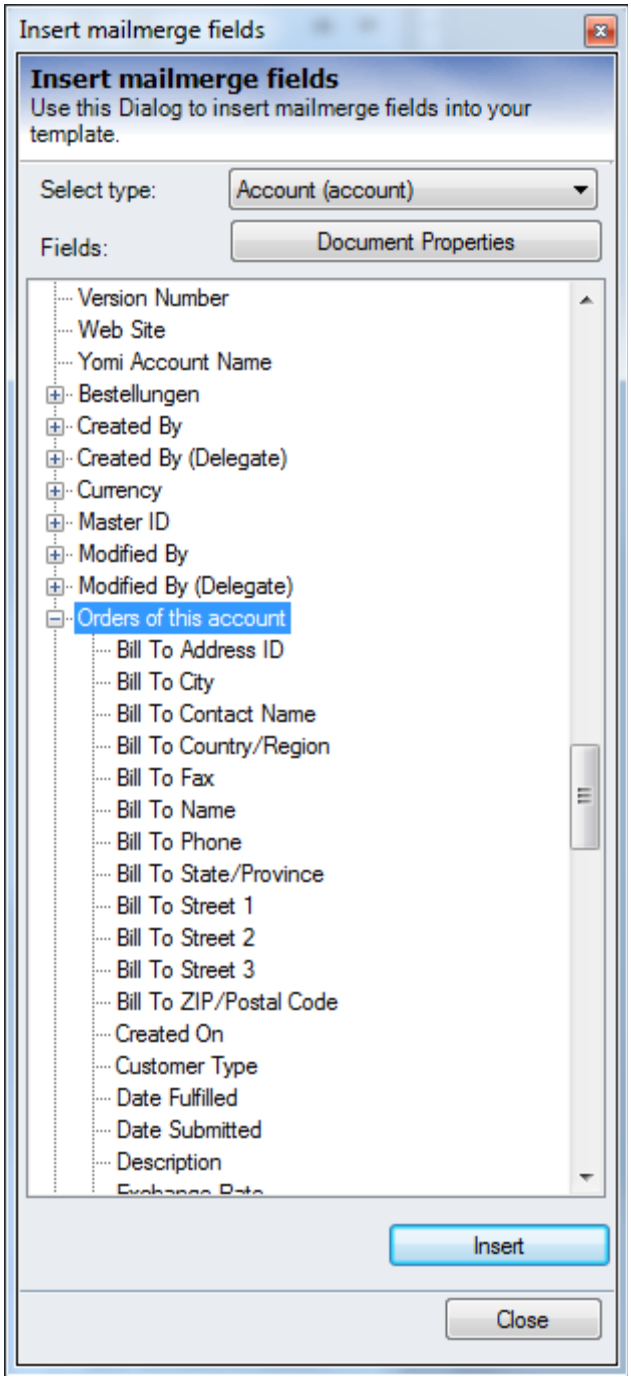
The combobox allows to choose Any relationship defined within MS CRM.



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

Step 4: After filling all fields we can proceed with a click on "Apply" and finally "Apply" all Relations and properties to the word document.

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


Insert mailmerge fields
Insert mailmerge fields
Use this Dialog to insert mailmerge fields into your template.
Select type:
Account (account)
Fields:
Document Properties
Version Number
Web Site
Yomi Account Name
Bestellungen
Created By
Created By (Delegate)
Currency
Master ID
Modified By
Modified By (Delegate)
Orders of this account
Bill To Address ID
Bill To City
Bill To Contact Name
Bill To Country/Region
Bill To Fax
Bill To Name
Bill To Phone
Bill To State/Province
Bill To Street 1
Bill To Street 2
Bill To Street 3
Bill To ZIP/Postal Code
Created On
Customer Type
Date Fulfilled
Date Submitted
Description
Insert
Close

10 CRM 2011 Internal Features

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

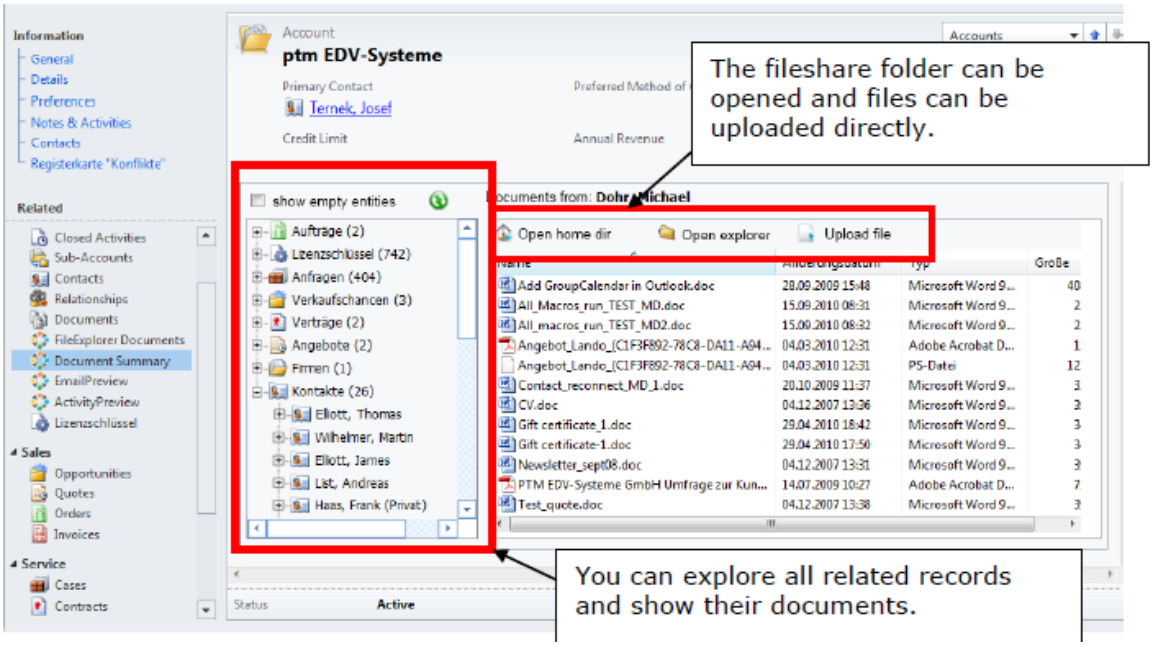
Those features include:

- DocumentSummary
- LineItemCount (Planned feature, not available in early versions of DCP for MS CRM 2011)

Documentation on how to activate and configure both of the following points can be found in our implementation guide for Documents Core Pack 2011 (server).

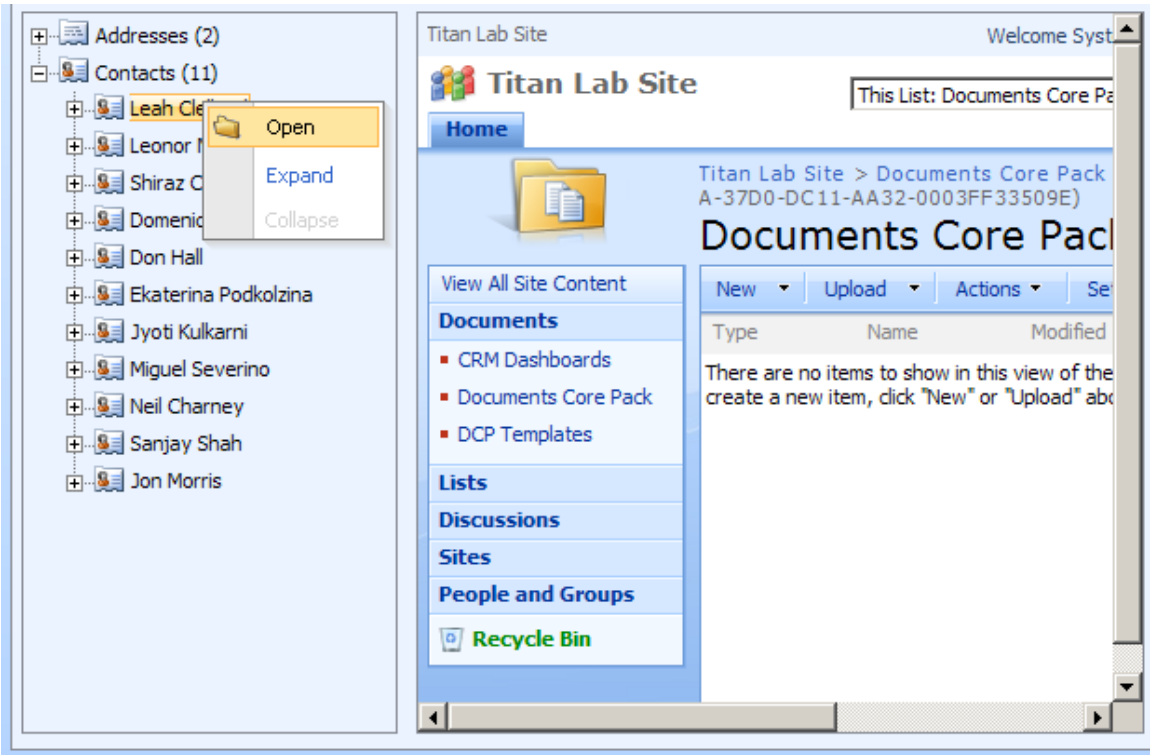
10.1 Document Summary

Enables display of documents saved to related records within CRM.
With Document-summary activated (for configuration see Implementation guide chapter 1.3.6) you will see a new navigation item in the side menu.



For example, Click on a contact to see the documents for that record.

The right click menu on each node provides the opportunity to open up the entity or expand/collapse the tree.



The tree is recursive. This means, that you can expand the tree downwards unless you reach the point where no further entities are related. For example, open an account, expand the contacts, expand the invoices of a contact and so on.

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

11 Contact

If you have problems with the product send an Email to:
support@c360.com