c360 Documents Pack Installation and Configuration Guide
Microsoft Dynamics CRM 4.0 compatible

c360 Solutions, Inc.
Products@c360.com
www.c360.com
<table>
<thead>
<tr>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview ..............................................................</td>
</tr>
<tr>
<td>Introduction ..........................................................</td>
</tr>
<tr>
<td>Installing the Server Component ................................</td>
</tr>
<tr>
<td>Requirements ..........................................................</td>
</tr>
<tr>
<td>Steps to install c360 Documents Pack for Microsoft Dynamics CRM 4.0</td>
</tr>
<tr>
<td>Upgrading the Server Component ................................</td>
</tr>
<tr>
<td>Server Configuration ..................................................</td>
</tr>
<tr>
<td>ISV Config ...............................................................</td>
</tr>
<tr>
<td>General Settings .......................................................</td>
</tr>
<tr>
<td>File Explorer ............................................................</td>
</tr>
<tr>
<td>SharePoint Configuration .............................................</td>
</tr>
<tr>
<td>‘Save Documents in SharePoint’ – Save in Folders ...............</td>
</tr>
<tr>
<td>Save Documents in SharePoint – Save in Sites ..................</td>
</tr>
<tr>
<td>LineItemCount ............................................................</td>
</tr>
<tr>
<td>General Settings .......................................................</td>
</tr>
<tr>
<td>Line Item Count Configuration Tool ...............................</td>
</tr>
<tr>
<td>LineItemCount for Custom Relations .............................</td>
</tr>
<tr>
<td>Document Summary ......................................................</td>
</tr>
<tr>
<td>Advanced Settings .....................................................</td>
</tr>
<tr>
<td>Client Component Installation ......................................</td>
</tr>
<tr>
<td>Client Installation Instructions ....................................</td>
</tr>
<tr>
<td>Terminal Server Installation ........................................</td>
</tr>
<tr>
<td>Language Settings for Documents Core Pack ......................</td>
</tr>
<tr>
<td>Client Language Settings ............................................</td>
</tr>
<tr>
<td>Server Language Settings ............................................</td>
</tr>
<tr>
<td>Location of the Language Settings on the server: ................</td>
</tr>
<tr>
<td>Modifying the UI Language on a client: ........................</td>
</tr>
<tr>
<td>Too Long Mergefields Problem ......................................</td>
</tr>
<tr>
<td>Set up Too Long Mergefields .......................................</td>
</tr>
<tr>
<td>Miscellaneous Items ..................................................</td>
</tr>
<tr>
<td>Security Settings .......................................................</td>
</tr>
<tr>
<td>Security Role ............................................................</td>
</tr>
<tr>
<td>Connection Dialog ......................................................</td>
</tr>
<tr>
<td>Standard View ..........................................................</td>
</tr>
<tr>
<td>Admin View ..............................................................</td>
</tr>
<tr>
<td>Documents Core Pack Templates ....................................</td>
</tr>
<tr>
<td>How to Create Documents Core Pack Templates ..................</td>
</tr>
<tr>
<td>Security Settings for Documents Core Pack Templates ..........</td>
</tr>
<tr>
<td>The Documents Core Pack Data Provider ..........................</td>
</tr>
<tr>
<td>Configuration ............................................................</td>
</tr>
</tbody>
</table>
Introduction
Before installing Documents Core Pack, please read this document and follow the steps carefully. After successful installation please read the “Users Guide” which is included in the downloaded zip file.

Intended Audience
This guide is intended for system administrators who are familiar with the following administrative tasks:
- Maintaining and configuring SQL Server databases
- Maintaining and configuring IIS based Web Sites / Applications
- Maintaining and configuring a Microsoft CRM Server

Installation consists of the following steps:
- Installing the server components of Documents Core Pack
- Configuring the CRM system
- Installing the client components of Documents Core Pack
- Configuring client security
Installing the Server Component

Requirements
The server component of Documents Core Pack provides you with the capability to start a mail merge form the MS CRM Web Client. The Documents Core Pack Server Component has to be installed on the server where MS CRM is running. If the Documents Core Pack server-component has already been installed, proceed to the portion of the documentation regarding ‘Upgrade’.

Steps to install c360 Documents Pack for Microsoft Dynamics CRM 4.0

1. Extract the c360 Documents Pack for MSCRM v4.zip file into a folder on the workstation.
2. Double click “Documents Core Pack Server for MS CRM 4.0.exe” file. The following screens will appear:

![Figure 1: Welcome Screen](image)
3. If you agree with the terms of the license agreement, select the option labeled 'I accept the terms in the license agreement' and click 'Next'.

4. Choose the installation folder. Click 'Install'.

5. Click the 'Change' button to specify a different folder than the default.
6. Click ‘**Install**’ to begin.

7. Enter the MS CRM Server name and select the Organization for which you are installing Documents Pack.

8. Click ‘**Test**’ to validate the connection.
The installation is complete.

**Upgrading the Server Component**

If there is a previous version of Documents Pack already installed on the server, the following screen will appear:
Server Configuration

After installing the Server component, “DocumentsCorePackServerConfig.exe” opens automatically. If the executable does not initiate automatically, manually execute the file via:
C:\Program Files\c360\Documents Core Pack Server for MS CRM 4.0\config

There are two alternatives to handle documents created with Documents Core Pack:
- **File Explorer:** To save documents in a fileshare on the server
- **SharePoint:** To save documents on a SharePoint

ISV Config

It is possible to choose the entities where the “Print in Word” button should appear in CRM.

If you say YES, then Documents Core Pack Server Config creates a copy of the original and changes the isv.config for you.

Select each Object where you want to add the “Print in Word” button. The Name of the button can also be customized.

Overwrite the Microsoft Dynamics CRM functionality by marking “Overwrite Microsoft Dynamics CRM Mail Merge Button”.

This setting affects the following entities: account, contact, lead, opportunities, offerings and all user-defined entity
Figure 2: The "Print in Word" Icon displays for all entities selected

**General Settings**

Click ‘**Configure Server Settings**’ and provide the following information:

**NOTE:** for details regarding General settings, see “**General Settings Details**” starting on p.15.

1. **MSCRM Server:** click to open the Connection-Dialog box. Enter the CRM servername and portnumber (e.g. *servername danubecrm* and runs via port *5555*).
2. **Templates**: define the location for the documents.

   **NOTE**: SharePoint has to be deactivated in order to modify this setting.

3. **Save Templates Locally**: allows users to use templates from their local machines.

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

4. **Language**: select language in the dropdown-box. Languages are listed in language code (en for English, de for German)

   *(see Languages starting on p.47)*

5. **Debug** leave unchecked. This is a support feature

6. **Datasource**: select the type of data. This contains cached information from CRM which can be used with DCP.

7. **Names to Cut** for detailed information *(see p.50)*

8. **Replace Special Characters**: determines treatment of special exceptions for certain coding problem in CRM.
9. **Additional Entities** define entities beyond standard customizable entities. To add entities, click on the [...] icon. A new window will appear which allows you to insert entities.

10. **Entities Don’t Show:** Entities that are registered here will be hidden and are not usable/visible with Documents Core Pack.
11. **Folder Displayattribute**: This setting allows you to set an attribute which should be used as a foldername on the SharePoint/Fileshare.

With the configuration above, documents created for the account entities will be saved to a “Companyname” folder. Cases will be saved to a “Case-Title” folder etc.
**File Explorer**

It is possible to use a File-share as a location for documents created via Documents Core Pack (Activities).

1. **Save Documents in fileshare**: check to activate. **NOTE**: it is not possible to use both SharePoint AND fileshare. When activating fileshare, SharePoint will deactivate automatically.

2. **Documents Default Folder**: click “…” to specify the fileshare to which the created documents should save.
3. **Configure folder for entities:** specify a special folder for each entity. If you set this option to (default), documents will be saved to the root of the fileshare.

4. Click on ‘Folder’ to open the folder. All documents for entity accounts will be saved to this folder. Click ‘X’ to reset to the default.
5. **Display Options**: choose how the saved documents should be displayed within CRM

   - Entity Details:

   - Letter Activity:

A new field containing the link to the document in the fileshare is now present. It is possible to open the document by clicking “Open Document”.

A new attribute called “new_fileexplorerdoclink” is defined automatically. If you want to use another attribute, check the [change activity field] option in the Letter Activity Field Settings. **IMPORTANT**: the field specified MUST exist in CRM.
SharePoint Configuration
It is possible to use MS SharePoint as a location for Documents Core Pack documents (templates, merged documents)

System Requirements:
- SharePoint Services 2.0 or 3.0
- SharePoint Portal Server 2003 or 2007

1. **Use SharePoint**: choose this option to use SharePoint. When activated the Documents Core Pack templates will be saved and loaded from SharePoint, otherwise they will be loaded from the Documents Core Pack templates share on the server.

2. **SharePoint Server**: enter name and Port of the SharePoint Server here. (in our case the name is danubecrm and port is 1919)

   **IMPORTANT**: Changing the server will reset all SharePoint specific settings.
3. **HTTPS**: check this option if you want to use https mode. Copy your certificate into the installation directory of Documents Core Pack Server. The file must be named “clientcert.cer”

4. **Template Folder Name**: define the folder on the server where the Documents Core Pack templates are located. Choose the folder where the Documents Core Pack templates are located.

5. **Save Documents in SharePoint**: there are two options for saving documents in SharePoint:
   - **Save in Folders**
   - **Save in Sites**
   Please see the two sections immediately following for details on both
‘Save Documents in SharePoint’ – Save in Folders

Check ‘Save Documents in SharePoint’ to activate.

1. **Documents Default Folder**: specify the default folder for documents saved with Documents Core Pack by clicking on “[...]”.

**NOTE**: the Documents Core Pack – services have to be installed on the SharePoint server to activate. If not, you will receive the following message:

Install the WMM SharePoint services on the SharePoint server, then continue.
a. Click "Specify User" to specify a user who has permissions to read the existing folders.

b. When you select a folder or list the first time, you will receive the following message:

Documents Core Pack needs additional fields on the current SharePoint-list to save the merged documents. The configtool can create this fields for you or you must create it yourself.

**Fields:**
- Fieldtype: Text / Name: Documents Core PackGUID / Length: minimum 50
- Fieldtype: Text / Name: Documents Core Pack / Length: minimum 50
2. **Configure Folder for Entities**: specify a folder for each entity.

Click on [Folder] to open the selection (e.g., account)

Moving forward, all documents for the entity account will be saved to this folder.

3. **New Folder for Each Row**: Select if you want an extra folder for each record of an entity (e.g., account, contact). Set the entity by default by ticking the checkbox.
Options:
Checksum: a new folder will be created for each record
Unchecked: Templates saved for this entity will be saved to the folder specified in No: 2 and 3 (see above)
(default): overtakes the state of the “New Folder for each row”-Checkbox.
4. **Visualization Options**: Choose where you want to see the created/saved documents

**NOTE:** by default “AllItems.aspx” is used to view SharePoint documents. Select “Use other aspx-site” to change preference

**a. Entity Details:** the documents will be shown within the entity details of the entities. A new menu option appears in the sidebar.

Specify entities where these options should appear when clicking on ‘Configure for entities’
b. Letter Activity: a new attribute will be added to the "letter" entity where a link to the document on SharePoint is saved. You can change the attribute by checking the 'Change Activity' field option. The following screen will appear:

**NOTE:** Choose "both" to see the documents in the sidebar and in the letter activity.
Save Documents in SharePoint – Save in Sites

Define how the documents should be saved to the SharePoint sites by selecting “Save in Sites”.

NOTE: the Documents Core Pack – services have to be installed on the SharePoint server to activate. If not, you will receive the following message:

Install the WMM SharePoint services on the SharePoint server, then continue.
1. Root Site: specify the default site for documents saved for Documents Core Pack by clicking on “[...]”.
2. **SharePoint Template:** when first configuring DCP, hit the refresh button to read all the SharePoint site templates. Select a SharePoint template that includes at least one Document Library.

3. **Document Library Name:** Enter the name of a Document Library that exists in the SharePoint template. The template was selected in step 2, verify that the name is entered correctly.
4. **Entity Specific Sites:** Configure a specific site for each entity where the sub sites for each record will be generated. Select a site on SharePoint and a SharePoint template that includes at least one Document Library. The name of the Document Library must exist in the template you select.

![Select Entity Specific Sites](image)

5. **Entity Relation Sites:** Select a relationship to another entity in which the sites will be generated as a sub site (e.g. if all contact sites should be created under the parent customer (account), select the relation for a contact to the account which is parentcustomerid).

![Select Entity Relation](image)
6. **Entity Site Name:** For each entity you have the option to select a “display” name. This name will be used for the site name of each entity (e.g. when you have configured in relation settings that the contacts will be saved under the related account, a sub site under the account site will be generated with the schema name. In this example, “Contact”. The contact sites will be created under this site. If you do not like this name, change the display in the settings).
LineItemCount

LineItemCount sums are all related to records of the open entity. This adds the result to the end of the fitting menu name. You can see the record-sum of every menu entry without clicking on it. This functionality applies to all entities. In the case of the account entity, the results would appear as below.

System Requirements: Java-script enabled on your browser.

“More Addresses (1)” means that the account owns one “More Addresses” record.
General Settings

For LineItemCount configuration, use the “Duocuments Core pack Server Config” option and navigate to the “LineItemCount” tab. In this view, you can see basic settings.

1) **Use LineItemCount** checkbox: Configure if you want to activate LineItemCount.
   - Unchecking collapses the tree view and disables the control (all tree view settings will be lost).
   - Checking activates the tree view.
2) **Select All**: Checks all nodes of the tree view. (top and sub-nodes).
3) **Top nodes**: Check for which entities you want to enable LineItemCount (see Figure 1).
4) **Sub nodes**: Exclude/Include certain entities (which belong to the top node). (see Figure 1 – these are the entities on the left side)
5) **Configure LineItemCount**: see the next section for configuration details
Line Item Count Configuration Tool

LineItemCoutn is configured for all standard-CRM entities which are linked by a 1:n relationship. All entities linked by custom n:n relationships will have to be configured manually. If you have custom entities in your CRM system, the tool gives the opportunity to count these custom entities as well.

IMPORTANT: One entity must be checked before you can use this tool.

1. NAV ITEMS (MENU-ENTRIES): Here are the entity-names, as CRM outputs it in HTML (names are defined by CRM). If you have custom entities, add here the HTML-name of your custom entity.

Editing-buttons: (CAUTION! There is no safety-question)
[Add] Adds a new navigation item
[Rename] Rename the existing selected menu entry
[Delete] Deletes the actual selected menu entry (nav item)

Important: by clicking these buttons, actions are performed immediately without a warning window. However, the changes are not saved until you click “Save” in the “General” area.
2. **Default Fetch**: The default-fetch of the selected navigation entry is shown. It counts all records which are directly related to the entity. It is not possible to delete or edit the default-fetch, but you can disable it by checking the “Don’t use Default Fetch” checkbox.

3. **Additional Fetches**: These fetches count all records which are not directly related to the entity (like recursive relations). Use this functionality to add user-defined fetches.

Wrong fetches will be ignored

**Editing-buttons**: (CAUTION! There is no safety-question)

[Add] Opens a blank screen to add a new fetch to the selected navigation entry. Use the text area under “Fetch-XML” to fill in the entity type codes (unique numbers of the entity) for that fetch. If you don’t insert a number, the fetch will be executed for all possible entities. To add the fetch to the list, click “OK”.

[Edit] Opens the selected fetch in a new window to be modified.

[Delete] Deletes selected fetch.

In the following example the navigation entry “navQuotes” (html name for quotes) receives a new fetch. If the field ”Fetch Type” was blank, the fetch would be executed for all possible quote menu items. Due to the fact that the text field includes a “1” (entity type code for account), the fetch only applies for the quote menu item in the account menu bar.

---

General:

All buttons in this area are effective for the entity window.
• **Overwrite with default fetches**: default values will be restored. You can save the current configuration before it is overwritten.

• **Save**: Saves your changes. Saving takes effect immediately, this means you can test your settings without closing the program. There is no need to reboot to test settings.

• **Close**: Closes the tool (after confirming to do so).

**LineItemCount for Custom Relations**

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

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

2. **n:n-Option**: It is not possible to set up custom n:n-relations by using the tree view. Rather, use the Configuration Tool.
   a. Add a new navigation-item to the list in the Navig Item-area. To find out the right name for the entry, just follow these instructions:
      ▪ Open a CRM-record in the menu in which the related entity appears.
      ▪ By pressing the F12-button (or Extras -> Developer Tools) the Developer Tool will appear.
      ▪ Click on the cursor in the upper left area of the tool.
      ▪ After that switch back to CRM and click on the menu item (for which LineItemCount should be configured).
      ▪ The html-code of that menu item will be highlighted and displayed in the Developer Tool.
      ▪ Now you only have to search through the highlighted selector for the attribute “id”. The value of the “id” is the name of the entry.
   b. Select this entry and add your own fetches in the “Additional Fetches”-area. By clicking the “save”-button all setting will be saved and the configuration is completed.

**Important**: If you add custom fetches, make sure that these include the attribute id. For example, if you want to expand an account, “attribute name=„accountid‟’ must be included.
Document Summary

With the Document Summary you have the possibility to view the File Explorer or SharePoint Documents from related entities. So you have to configure SharePoint or File Explorer before activating the Document Summary.

**EXAMPLE:** you have an account with 5 related contacts. Instead of open up every contact and open “File Explorer Documents” or “SharePoint Documents” of each one, you can use the Document Summary to view the documents of the contacts.

The first level of the tree indicates on which entity you want to see the Document Summary. And the second level of the tree indicates, which related entities you want to see. You could only select 1:n relations.

After activating the Document Summary, you’ll see a new navigation item on the entities you selected in the first tree level.
You can click on a contact to see its (File Explorer or SharePoint) documents. The same applies when you open up the contact and click on “SharePoint Documents” or “File Explorer Documents”. You have also a right click menu on each node. You can open up the entity or expand/collapse the tree.

The tree is recursive. This means, that you can expand the tree downwards till you don’t have any related entities. **EXAMPLE:** open an account, expand the contacts, expand the invoices of a contact and so on.
**Advanced Settings**

1. **Install Plug-In:** when you install the plug-in, the folder on SharePoint or FileExplorer will be created immediately after creating a CRM record.

2. **Create all folders:** checking this box triggers the Server config to generate the folders for all configured entities during the save process. Also, the folders will be renamed if the name of the CRM record was changed.

3. **Enable Directory Security:** Control the access to the fileshare. Only the specified user has full control to the fileshare. Every user who is allowed to access the CRM record will be granted access to this directory when accessing via DCP. The security is restored every night to default.

4. **SharePoint User:** Specify options for a SharePoint user. The user is only used to create the folders on SharePoint. To avoid "401 Unauthorized" errors it is recommended to specify a user.
Client Component Installation

Prerequisites:
You must first set Internet Explorer Security, to enable mail merge from the CRM web client. The tasks below are done on each client machine or on the terminal server.
Documents Core Pack will run under the standard security settings pre-defined for the zone “Trusted sites”. However as part of the Internet Explorer security, you will be prompted if you want to activate the Documents Core Pack ActiveX add-in.

In order to run Documents Core Pack without being prompted, follow the steps below:
1. Check what Security Zone the CRM system runs in, on the client machine
   a. Start Internet Explorer
   b. Type the CRM Server address in the “Address Bar”
   c. Check the Zone Setting on the right side of the Internet Explorer Status bar
   d. Enter your CRM site to the list of Trusted sites on every client

![Internet Options](image1)
![Trusted sites](image2)
2. Set up Internet Explorer to allow the Documents Core Pack ActiveX controls to run:
   a. Double-Click on the **Zone Setting Icon** (Local Intranet in this example). The following dialog box will appear:
   
   ![Internet Security Properties dialog box]
   
   b. Click on **Custom Level** to view the current Security Zone settings. You must set the following permissions to either “Enable” or “Prompt” (“Enable” is recommended):
      - Initialize and script ActiveX controls not marked as safe
        - Disable
        - Enable
        - Prompt
      - Run ActiveX controls and plugins
        - Administrator approved
        - Disable
        - Enable
        - Prompt
      - Script ActiveX controls marked safe for scripting
        - Disable
        - Enable
        - Prompt
   
   c. Click **“OK”** twice to accept and close the Security Zone Settings. Documents Core Pack Client is now set up and ready to mail merge from both MS Word and the CRM Web Client.
Client Installation Instructions

IMPORTANT: before installing the components:

- Close all Office products
- Verify that the machine is online to the MS CRM server. Review the Windows Task Manager to assure that WINWORD.EXE and OUTLOOK.EXE are NOT running on the processes list.

1. Run ‘Documents Core Pack Client for MS CRM 4.0 Setup.exe’ and click “Next”

2. If you agree with the terms of the license agreement, select the option labeled ‘I accept the terms in the license agreement’ and click ‘Next’.

3. Set the MS CRM server information and Organization. This is the name you enter in the Internet Explorer (without http://). Also enter the port number if it is not standard. Click “OK”
4. Select the Installation folder and click "Next"
5. Confirm Installation and click **“Install”**

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

To install Documents Core Pack on a Terminal Server:

1. Navigate to the Control Panel>Add/Remove Programs-option and click on the "Add new programs" button.
2. Click on the "CD or floppy disc" button to open the installation wizard and chose the DCP-Setup-file.
3. Click on “Finish” to start the installation.

4. You will see following window. Click “Next”.

Welcome to the Installer for Documents Core Pack Client for MS CRM 4.0, Version 4.55

The Installer will Install Documents Core Pack Client for MS CRM 4.0 on your computer. To continue, click Next.

WARNING: This program is protected by copyright law and international treaties.
5. If you agree with the terms of the license agreement, select the option labeled 'I accept the terms in the license agreement' and click 'Next'.

6. Select the Installation folder and click "Next"
7. **Confirm Installation and click “Install”**

8. **Connection Dialog**

In the connection-dialog you have to enter the CRM servername with the port.
(eg : servername : crm, port : 5555)

When installing on Terminal Server, you have to change to the administrator-view and specify a user and a profile.
**IMPORTANT:** Change a registry entry to use integrated security.

9. Navigate to Start > Run > “regedit” and browse to “HKEY_LOCAL_MACHINE\SOFTWARE\PTM EDV-Systeme\” Choose the configured profile (you can see the profile used in the HKLM\SOFTWARE\PTM EDV Systeme\Wordmailmergeclient\ActiveProfile setting)

The regarding entry is called “CrmUseIntegratedSecurity”. Change the value to “True”.
Language Settings for Documents Core Pack

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

Client Language Settings

1. Location of the Language Settings on the client
   The name of the Language XML File is: <language>.XML
   The language file is located in the sub folder localization of Documents Core Pack installation folder, typically under “C:\Program Files\PTM EDV System GmbH\Documents Core Pack Client for MS CRM 4\Localization”

   Example:
   The Language file for the English UI is: en.Xml
   <Language setting> is the language code that Documents Core Pack should use on the client. Each client can have their own language settings and files.

2. Modifying the UI language on a client
   The UI Language is determined at startup by the registry setting “Language”. To modify this setting, follow this procedure:
   a. Press START – RUN
   b. Type “regedit” and click OK
   c. Locate the registry key HKEY_LOCAL_MACHINE\Software\PTM EDV-Systeme\CRMMailMerge
   d. Change the value of the “language” setting to another language
   e. Close the registry editor

   NOTE: In order to use another language than English, you need to create a copy of the “en.Xml” language file, and rename it for a valid language setting. For example, to create a Dutch language file, rename the file to “nl.Xml” and then translate the strings in the file. After that you open the registry and change the value of “language” setting to nl.
3. Translating a Language File
You can use a Text Editor or a generic XML Editor to edit the language files.

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

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

You should ONLY modify the contents of the `<value>` tags. Do not modify the `<name>` tag.
Server Language Settings

Location of the Language Settings on the server:

The UI of Documents core Pack Server can be modified to any language. All UI display strings are stored in an XML file.

a. The name of the Language XML File is: <language>.XML
b. The language file is located in the sub folder localization of Documents Core Pack installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Server for MS CRM 4\Localization"

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

NOTE: The language XML-Files from the server and client component are different. If you want to translate Documents Core Pack you have to translate both files the language file on the client and on the server.

Modifying the UI Language on a client:

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

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

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

In some cases there occurs a problem with too long Mergefield Names. Winword just support a length of 40 characters for a Mergefield.

So if you add two Fields called

```mergeline
{ MERGEFIELD customerid_contact_parentcustomerid_address1_country \* MERGEFORMAT }
{ MERGEFIELD customerid_contact_parentcustomerid_address1_fax \* MERGEFORMAT }
```

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

```
«customerid_contact_parentcustomerid_addr»
«customerid_contact_parentcustomerid_addr»
```

So Documents Core Pack can’t differentiate them !!

To solve this Problem we added the possibility to replace long Names with short Names. For e.g. "parentcustomerid" with "pc1".

**Set up Too Long Mergefields**

1. When mergfields names are too long, use **NamesToCut** key located in the Settings-entity of the DCP server. (Do not change this name)

"parentcustomerid-pc1,parentaccountid-pa1"

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

2. You may also store this value in the template:

These template “NamesToCut” settings overwrite the Settings from the server.

DCP replaces all findings, meaning, if you have a Mergefield called

“customerid_pearentcustomerid_parentaccountid_name” it will be changed to

“Customerid_pc1_pa1_name”
Miscellaneous Items
If you change the NamesToCut KEY it is possible that all OLD Templates will be affected because in your old Templates the Mergefields are still stored with the long name.

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

Now you change the Web.config to shorten parentaccountid to pc1. NEW Templates will be filled right! (Insert MailmergeFields inserts the right short name into your Template.)

All the OLD Templates which uses Mergefields including parentaccountid will not work anymore. So you have to edit them! (Maybe the Replace... Function of Winword will be a good Idea.)

Sometimes it is better to replace full Mergefields. Instead of changing just a part of a Mergefield let WMM replace the whole one.

Example:
"customerid_contact_parentcustomerid_address1_fax" to "cust_cont_par_adr1_fax"

In this case, old templates will not be affected but you have to add every field to the web.config.
Security Settings

Security Role

1. Navigate to Settings>Administrator>Security Roles>dcp/gc/ti security role

2. The following screenshots show which CRM rights are necessary so you can work with Documents Core Pack:
Connection Dialog

Standard View

1. **Load**: provides the ability to load pre-configured connection profiles (e.g. from earlier installations).
2. **Switch to Admin View**: change to admin view
3. **MSCRM Server**: enter the name of the CRM server. This is the name entered in Internet Explorer (without the http://). Also enter the port number.
4. **Organization**: enter the Organization name or click on the Combo box button and the available Organizations will display.
5. **Test**: Check the connection first, then click “OK”. 
Admin View

1. **New, Save, Delete**: allows you to create new, save and delete profiles.
2. **Switch to User view**: click to switch to User view (previous scenario).
3. **Connection**: select the kind of connection (Standard, Hosted or Live).
4. **Profile**: contains the name of the profile.
5. **Discover**: enter our CRM server. If you don’t see any Organizations when entering your CRM server, please contact your system administrator.
6. **HTTPS**: if your CRM server is configured to run via SSL, the client has to be configured to use https as well.
7. **Integrated Security/Supply user**: specify a set of user credentials for the CRM connection or to use integrated security (meaning the credentials of the actual windows user will be used).
Documents Core Pack Templates

Documents Core Pack Templates are predefined Word Templates which have some mail merge fields in it. You can define for each MS CRM Entity (e.g. account, contact, ..) different Templates.

For example you have a “Account reconnect” Template you often send to accounts. Then you create this template and save it as Account – Template and from this moment every MS CRM User can generate a “Account reconnect” Letter with this template from the MS CRM Web Client.

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

How to Create Documents Core Pack Templates

Read the “Users Guide” – Document to get more information about the creation of Documents Core Pack Templates.
Security Settings for Documents Core Pack Templates

This section is just for NON-SharePoint users as the templates are stored on a share on the server in this case. The saved Documents Core Pack templates are saved in a share on the server where you installed the Documents Core Pack server component by default, typically under c:\program files\PTM EDV-Systeme GmbH\Documents Core Pack Server for MS CRM 4\templates\.

If you want to allow only some users to create or change Documents Core Pack templates you can do that with defining some NTFS Security Settings on this File Share.

It is also possible to change the location of the Documents Core Pack templates. Open the DocumentsCorePack configuration tool.
The Documents Core Pack Data Provider

Documents Core PackDataProvider builds up the web service which is needed to load data from CRM to MS Word and inversely to save data into MS CRM. This improves the performance of Documents Core Pack as the web service doesn't have to be established again.

You can see if the Provider is started in the taskbar.

Configuration
Right-click on the icon in the taskbar -> “Config” to open the Documents Core PackDataProvider configuration.

The following window appears:

**Status & ping frequency:** Here you can see how long the service has been alive and when the last ping occurred.

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

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

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