



Word-Interface for Microsoft Dynamics CRM 2011

Installation and configuration manual

CRM-Word-Interface for MS CRM 2011

Interface version: 5.3.0

Document version: 5.3

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1. Preface

Thank you for choosing our [Word interface for Microsoft Dynamics CRM](#).

Now you have the option to easily export your CRM information into predefined Word templates. Your correspondence will be unified and optimized in terms of time.

The CRM Word interface is an [addon for Microsoft Dynamics CRM 2011](#).

In the following pages you will find detailed instructions on installing and configuration details.

2. Installation

2.1. Requirements

A Microsoft Dynamics CRM 2011 system must be installed on your server. In order to install our [Word interface for Microsoft Dynamics CRM](#), you must have the System Administrator security role.

To use the [Word-Interface for Microsoft Dynamics CRM](#), your local pc needs to install a program which can display documents created with Word 2007 or higher. A free Word viewer and the corresponding Microsoft Office Compability Pack for file formats for Word, Excel and PowerPoint or installing an OpenOffice.org is sufficient. Of course, every Office version of Microsoft Office 2000 and Windows 2000 or higher, possibly with the corresponding Compability Pack, is suitable.

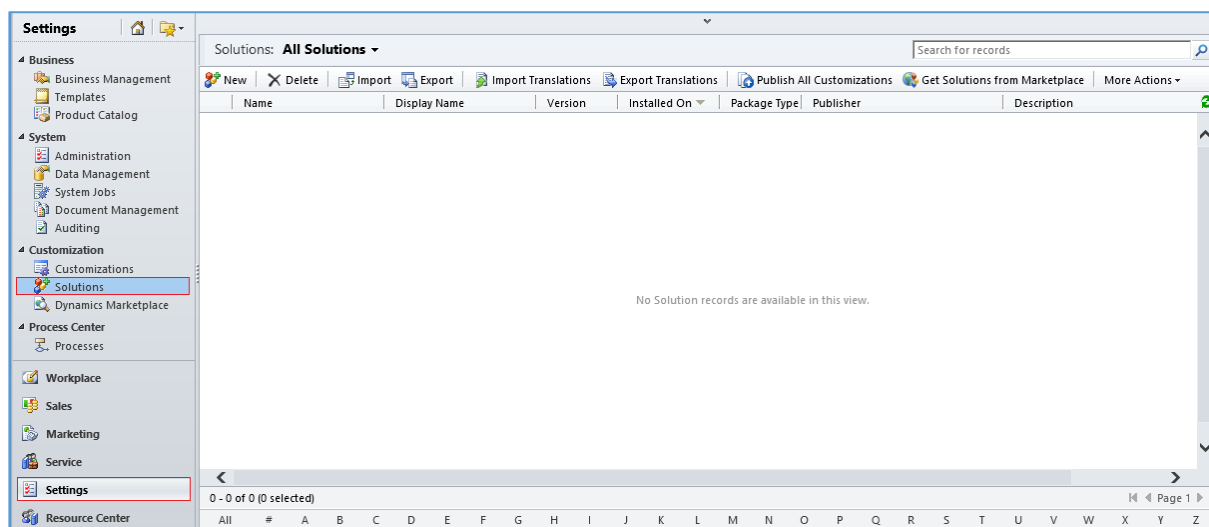
The document format .docx, which is provided from Microsoft Office Word 2007 on, is used to singularly create Word templates.

2.2. Installation guidelines

2.2.1. Importing the solution

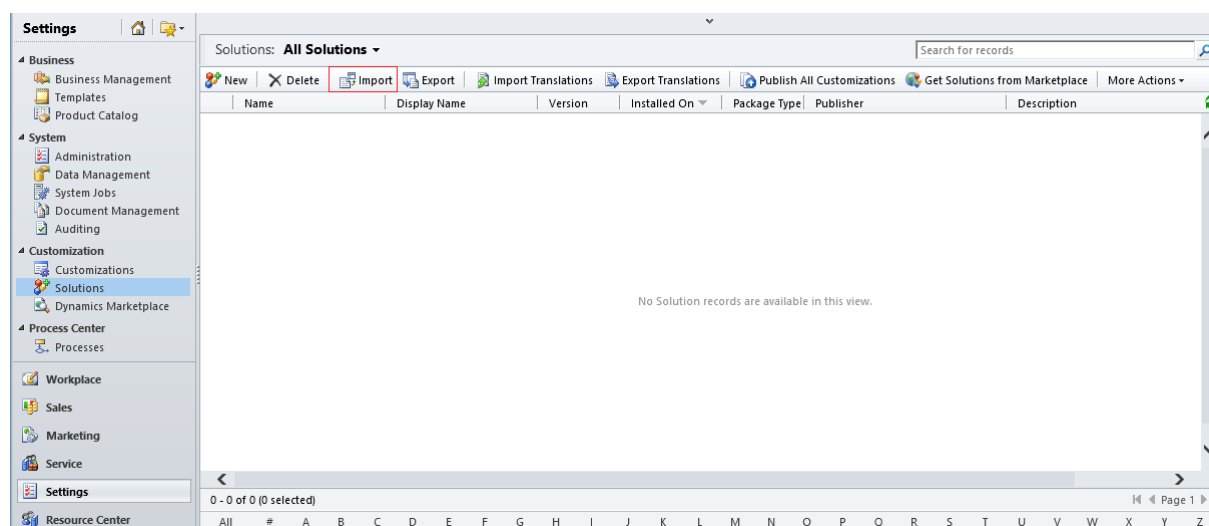
You received a solution from us.

In the sitemap of the navigation area of your Microsoft Dynamics CRM 2011 system, go to “Settings” and activate the entity “Solutions” in the left application area.

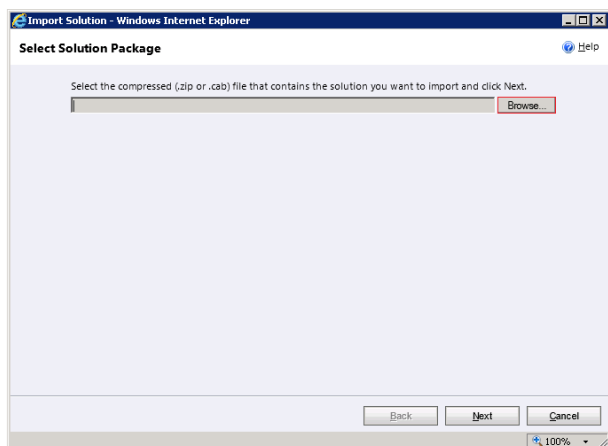


All current solutions of your CRM system are displayed here.

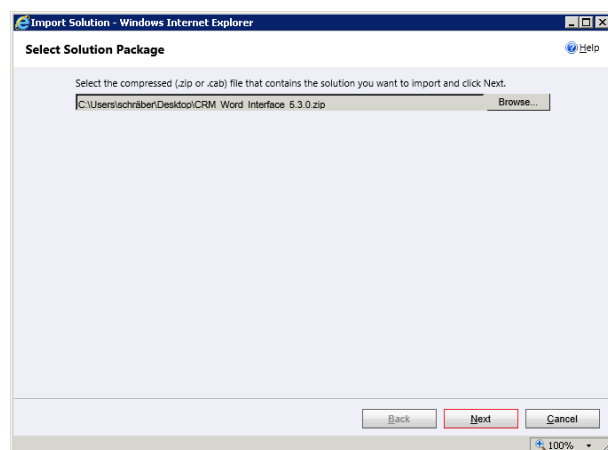
Now, click on the “Import” button in the toolbar.



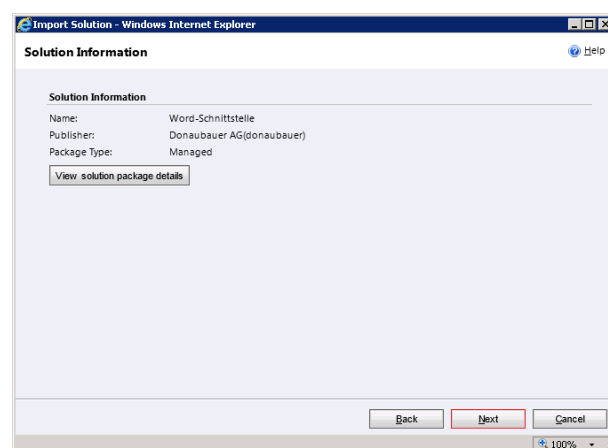
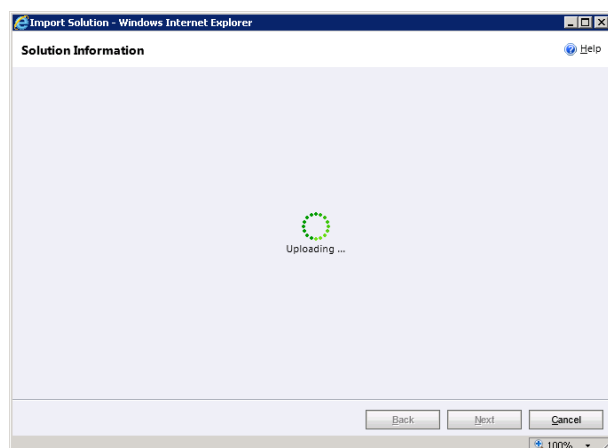
The following window opens up:

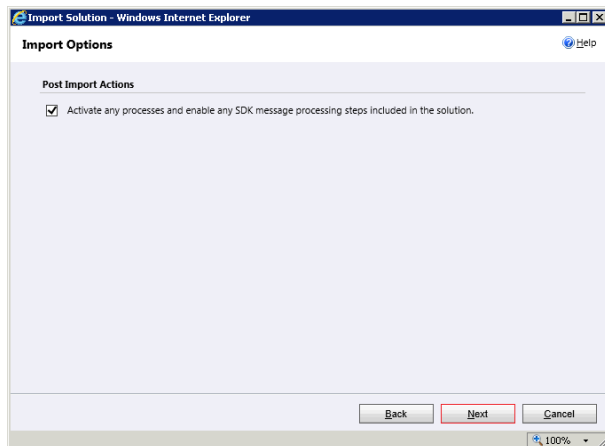


Use the “Browse” button and select the storage location of the solution you received from us. Open this solution.

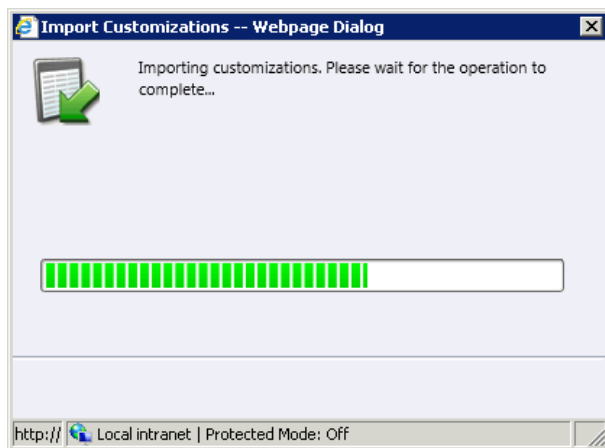


The solution will be displayed in the data field. You may now confirm this and the following windows by clicking on the “Next” button.



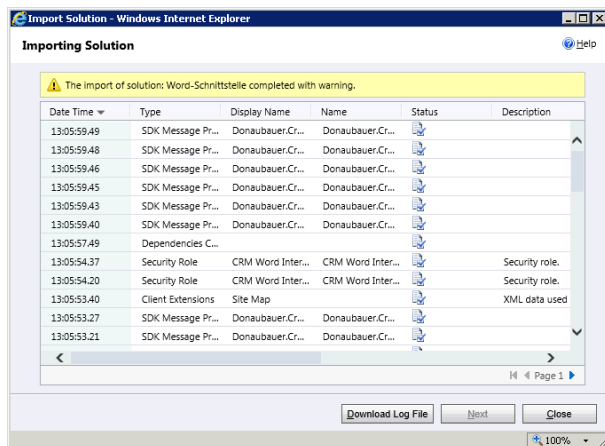


In this window, please tick the displayed box for activating all processes and message processing steps. Complete this step by clicking the “Next” button.”



Now the solution is being imported.

This process may take several seconds.

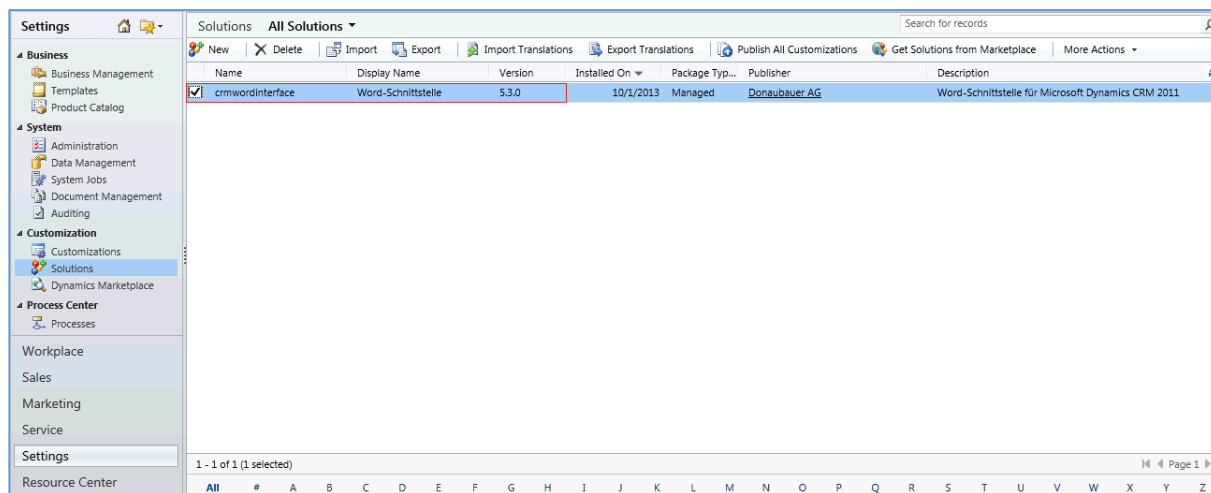


As the installation process is finished, the log file opens for checking and information purpose.

If all points listed have a “ticked” item in the “Status” column, the installation has been completed successfully and error-free. You may now conclude the process by clicking on the “Close” button.

The here displayed screenshot shows a warning message, resulting from the following problem: the interface is available both in German and in English. The CRM, however, is only available in German. Therefore, this warning message can be ignored.

An entry named “crmwordinterface” (Display Name: Word-Interface) appears in the CRM system in the “Solutions” entity.



Name	Display Name	Version	Installed On	Package Typ...	Publisher	Description
☒ crmwordinterface	Word-Schnittstelle	5.3.0	10/1/2013	Managed	Donaubauer AG	Word-Schnittstelle für Microsoft Dynamics CRM 2011

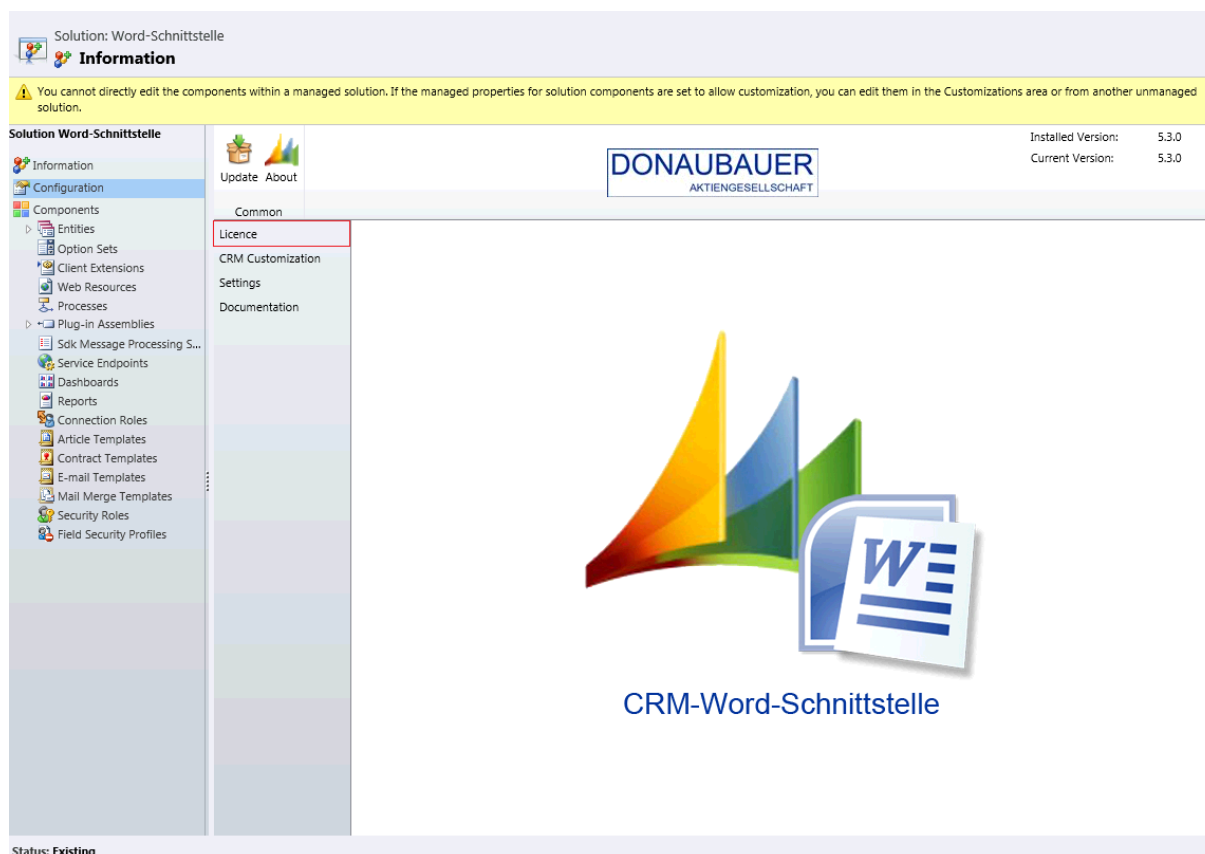
1 - 1 of 1 (1 selected) Page 1

Navigation: All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

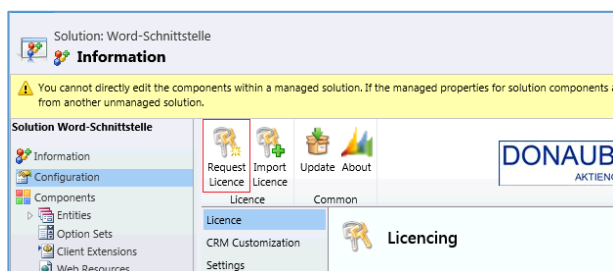
2.2.2. Automatic license request

Now you need the respective license key for your interface.

Open the imported solution by double clicking on int. The following window appears.



First, click on the “License” button and then click on “Request License”. Now, please follow the instructions of the pop-up window.



Licence Request

To continue you must accept the terms of this agreement. You will then receive a 30 day DEMO license or your full license.

Your E-Mail address*

```
<WordInterface>
  <orgname>Schnittstellen Dokumentation (Englisch)</orgname>
  <organizationid>2b608d5e-e8c2-e211-97d9-00155d001b26</organizationid>
  <version>5.3.0</version>
  <expirationdate>2013-11-01</expirationdate>
  <type>Enterprise</type>
</WordInterface>
```

Bitte lesen Sie vor Installation der Software namens Word-Schnittstelle für Microsoft Dynamics CRM 2011 diese Lizenzbedingungen aufmerksam durch.
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Mit dem Erwerb dieses Software-Tools sind Sie berechtigt, eine Kopie des Produktes für eine CRM-Organisation zu

☒ I accept the terms of this license agreement.

An email address is required for the automatic license request. Additionally, you must accept the terms of this agreement.

Licensing

Licenceinfo

Organization Name:

Organization Id:

Version:

Licencetype:

Expirationdate:

Licencestatus

Licence invalid.

Licencekey not found.

Importing Licence

By clicking on the "Next" button, the CRM server will connect one-time with our server, which will then transmit the license key to your system.

Solution Word-Schnittstelle

Information Configuration Components Entities Option Sets Client Extensions Web Resources Processes Plug-in Assemblies Sdk Message Processing S... Service Endpoints Dashboards Reports Connection Roles Article Templates Contract Templates E-mail Templates Mail Merge Templates Security Roles Field Security Profiles

Request Licence Import Licence Update About

DONAUBAUER
AKTIENGESELLSCHAFT

Installed Version: 5.3.0
Current Version: 5.3.0

Licensing

Licenceinfo

Organization Name:

Organization Id:

Version:

Licencetype:

Expirationdate:

Licencekey

PFdvcnRjbnRlcmZnY2U+PG9yZ25hbWU+U2Nobml0d
HN0ZWxsZW4gRG9rdW1lbnRhdGlvbiAoRW5nbGlzY2g
pPC9vcmdyYW1lPjxvcmdhbmI6YXRpb25pZD4yYjYwO
GQ1ZS11OGMyLUUyMTETOTdkOS0wMDE1NWQwMD
FIMjY8L29yZ2FuaXphdGlvbmIkPpZ2ZXJzaW9uPjUuMy4
wPC92ZXJzaW9uPjx0eXBIPkVudGVycHJpc2U8L3R5cG
U+.....s

Licencestatus

Licence valid.

After the successful import of the license key, the according information will be displayed.

2.2.3. Request a license without internet connection

If the CRM server cannot connect to the internet, the following window will appear after clicking on the “Request License” button.

Lizenzanforderung

Für Ihre Lizenzanforderung wird Ihnen hiermit ein Text dargestellt, welchen Sie im Anschluss bitte kopieren. Übersenden Sie diesen Text bitte zur Lizenzerstellung an folgende E-Mail Adresse.

```
<WordInterface>
<orgname> Schnittstellen</orgname>
<organizationid>70f0e43c-0961-e011-ad1a-00155d007813</organizationid>
<version>5.3.0</version>
<type>Enterprise</type>
<expirationdate>2013-10-27</expirationdate>
</WordInterface>
```

Ok

In this case, please send us the displayed information via email to lizenzen@donaubauer.com

With these information, we can generate your license, which will be sent to you immediately via email.

After receiving the license key from us, you need to import it into your system.

To do so, open the imported solution of the Word interface again and click on the “License” button. Next, the license key is entered in the right field (1). Now, click on the “Import License” button.

Request License Import License Update About

DONAUBAUER
AKTIENGESELLSCHAFT

Installed Version: 5.3.0
Current Version: 5.3.0

Licencing

Licenceinfo

Organization Name:

Organization Id:

Version:

Licencetype:

Expirationdate:

Licencekey

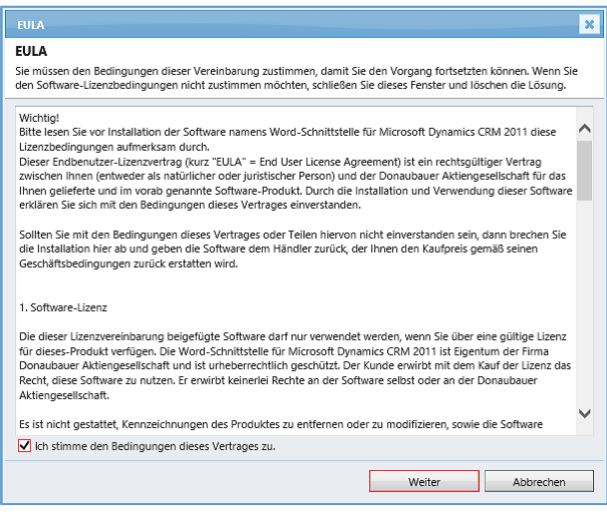
1

Licencestatus

Licence invalid.

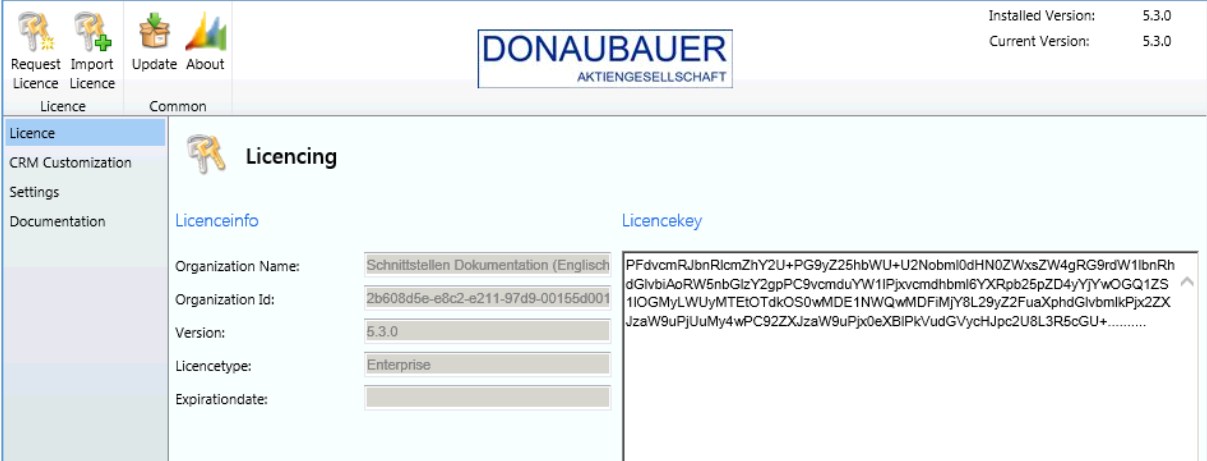
The licence expired.

The following window displays the end user license agreement, which you accept by installing the CRM Word interface together with the Donaubauer AG. Please read this agreement carefully before continuing the software installation. You can accept the terms of the license agreement, if you agree with them.



If you do not to accept the terms of our license agreement, please cancel the process by clicking on the “Cancel” button in the lower right corner of this window and uninstall the CRM Word Interface according to instructions given in section 3 of this manual.

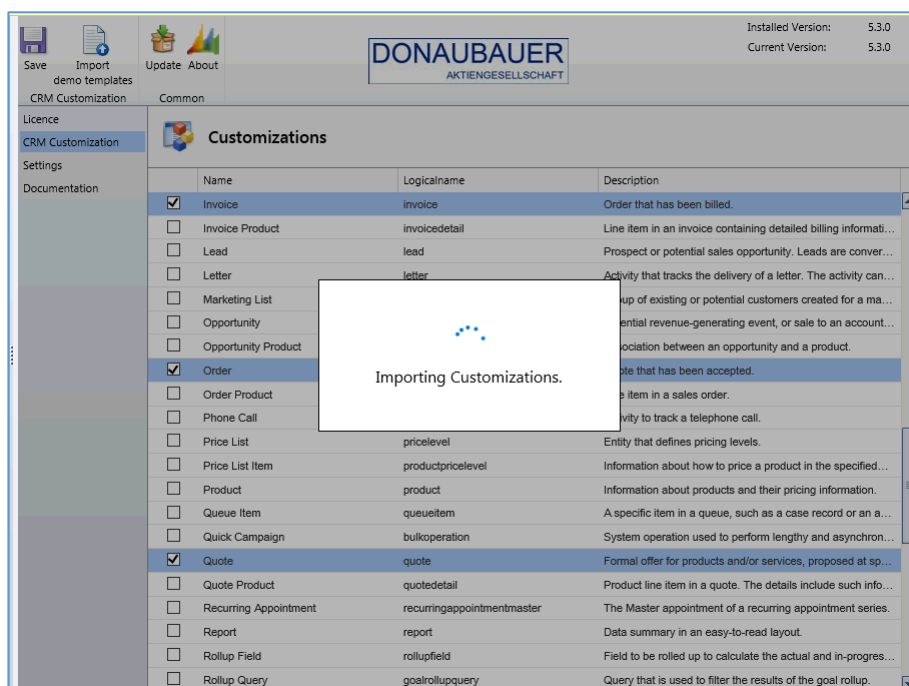
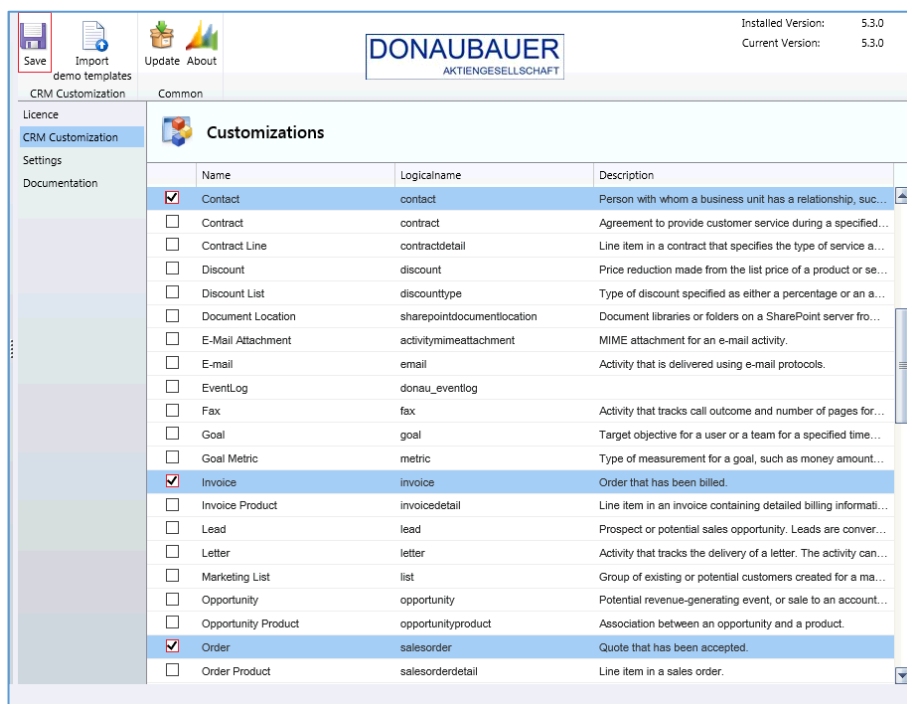
After importing the solution, the fields of the “license information” were filled automatically with the current data of your license key.



2.2.4. Configuration of the interface

All entities used to create Word documents need to be configured according to their features.

Within the menu item “CRM Customization”, in front of the displayed entity name, you will find a box. All entities used to create Word documents with the Word Interface are selected by ticking the respective box. Complete the process by clicking on the “Save” button.

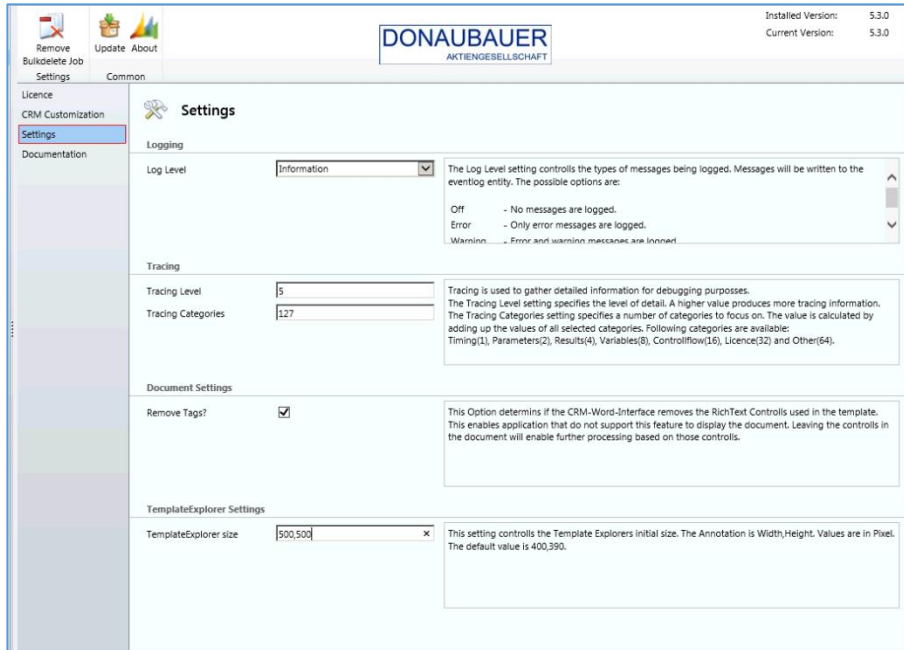


This process can take between a several seconds and a few minutes, depending on the system performance.

You can mark each entity individually or select multiple, and then save the process. It is also possible to configure single entities subsequently.

2.2.5. The “Settings” menu item

The “Settings” menu item contains settings options for the interface analysis and display:



Log Level: The Log Level controls the types of messages being logged. Messages will be written to the eventlog entity. The possible options are:
 Off: No messages are logged.
 Error: Only error messages are logged.
 Warning: Error and warning messages are logged.
 Information: All messages are logged.

Tracing Level: Tracing is used to gather detailed information for debugging purposes. The Tracing level setting specifies the level of detail. A higher value produces more tracing information.

Tracing Categories: The Tracing Categories setting specifies a number of categories to focus on. The value is calculated by adding up the values of all selected categories. Following categories are available: Timing (1), Parameters (2), Results (4), Variables (8), Controllflow (16), Licence (32) and Other (64).

Template Explorer Size: This setting controls the Template Explorers initial size. The Annotation is Width,Height. Values are in Pixel. The default value is 400,390.

Entries in these fields are saved automatically when closing this window.

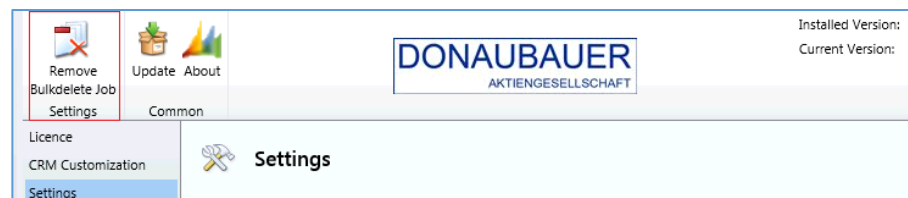
2.2.6. Bulkdelete Job

The “Settings” menu item contains the button “Create Bulkdelete Job”.



During standard usage of the CRM Word interface, notes are generated in the background as auxiliary objects. These notes cannot be deleted immediately.

To do so, a Bulkdelete Job is necessary, which is created by clicking the respective button in the system. It regularly removes unusable notes from the system. (Only notes generated by the interface are removed). As soon as the job has been created, the button alternates into “Remove Bulkdelete Job”.



This Bulkdelete Job should not be removed before uninstalling the interface.

After initially opening the solution “crmwordinterface” and emptying the Internet Explorer (clear cache) with the key combination “Ctrl + F5”, the solution “cwicustomizations” with the display name “CRM-Word-Interface Customization Solution”, which is also a part of the Word interface, is displayed. The sitemap shows the section “Donaubauer AG” with the entities “Word Templates”; “Configuration” and “EventLogs”.

Name	Display Name	Version	Installed On	Package Typ...	Publisher	Description
☒ cwicustomizations	CRM-Word-Interface Cust...	5.0.0	10/2/2013	Unmanaged	CRM Word Interface Customization P...	Word-Schnittstelle für Microsoft Dynamics CRM 2011
☐ crmwordinterface	Word-Schnittstelle	5.3.0	10/2/2013	Managed	Donaubauer AG	Word-Schnittstelle für Microsoft Dynamics CRM 2011

All entites which you selected to work with the Word interface, are listed in this solution.

Display Name	Name	Type	State	Customizable	Descriptio
☐ Contact	contact	Entity	Managed	True	Person with
☐ Invoice	invoice	Entity	Managed	True	Order that h
☐ Order	salesorder	Entity	Managed	True	Quote that h
☐ Quote	quote	Entity	Managed	True	Formal offer

2.2.7. The “Configuration” entity

The “Configuration” entity contains certain items.

Here, you can see your current license key

Save	Save & Close	Deactivate	Sharing	Copy a Link	E-mail a Link	Run Workflow	Start Dialog	Run Report
Save			Collaborate			Process		Data

Configuration
LicenceKey

Configuration ▼

General

Name *	LicenceKey	Application *	CRM Word Interface
		Parent	

Data

Data Type	Multiple Lines of text
-----------	---

Value (Multiple Lines of Text)

```
PfdvcmRlbnRlcmlZnYzU+PG9yZ2Z5bWU+U2Nobml0dHN0ZWxsZW4gRG9rdWl1bnRhRGVibGIAoRW5nbGlzY2gpPC9vcmdudYW1lPjxvcmdhbmI6YXRpb25pZD4yYjYwOGQ1JZS1I
OGMyLUWUyMTE0TdOkO5owMDE1NWQwMDFIMjY8L29yZ2FuaXphdGlvbmikPjZ2XjZaW9uPlJuMy4wPC92ZXIzaW9uPlJoOEhBPkVudGVycHJpc2U8L3R5cGU+PFNoZ25hdHYy
PmFQQUITWizQ9NVNXCxNTUzQ0pODZHtclYWMOWTNUQ3pDaGcwY0EzTDBlcmU0S3pNVXI0EZA4ziwS1pBdzMeEkxFU4NDJjYnVxdFwvFhOTNncBiYU9waWhwQk9t
Q0J1QzNscGVKN24vMTAxMmdpODAXaZ2ia8IMG/LaTU1bm85OEY5SEJMvnpXNDByHVhplN38IZStjc2ISUjJNMWwhUkd4Myt3TDUwukRmWUxRRGpid91WFf5UE9NwnRwNzpr
TFFKtm9YRGJ6VmFMjluYkp6NXky3GdyGMVZRWU8wY2t3aWFlZLZWwFTctIUVEFNcEW1TFNRndGlnQTaORUxaYWsXUER1DNOWFFVFJSk1Wa0V2MJ/BmeGtvCfh4qG90ZTZV
eUZURRJVTJEDxGuML.....
```

as well as your settings determined in the “Settings” menu item.

Settings

Workplace

Sales

Marketing

Service

Settings

Resource Center

Configuration

All Donaubauer AG Configurations

Application

Name

Value

Business

Business Management

Templates

Product Catalog

System

Administration

Data Management

System Jobs

Document Management

Auditing

Customization

Customizations

Solutions

Dynamics Marketplace

Process Center

Processes

Donaubauer AG

Configuration

EventLogs

Word Templates

Search for records

☐	Application	Name	Value
☐	CRM Word Interface	LicenceKey	PfdvcmRjbnRlcmZhY2U+PG9yZ2Z5bWU+U2Nobml0dHN...
☐	CRM Word Interface	LogLevel	3
☐	CRM Word Interface	RemoveTags	True
☐	CRM Word Interface	templateexplersize	500,500
☐	CRM Word Interface	TracingCategories	127
☐	CRM Word Interface	TracingLevel	5

1 - 6 of 6 (0 selected)

14

Page 1

2.2.8. The “Word Templates” entity

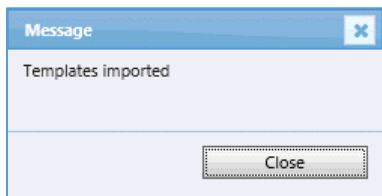
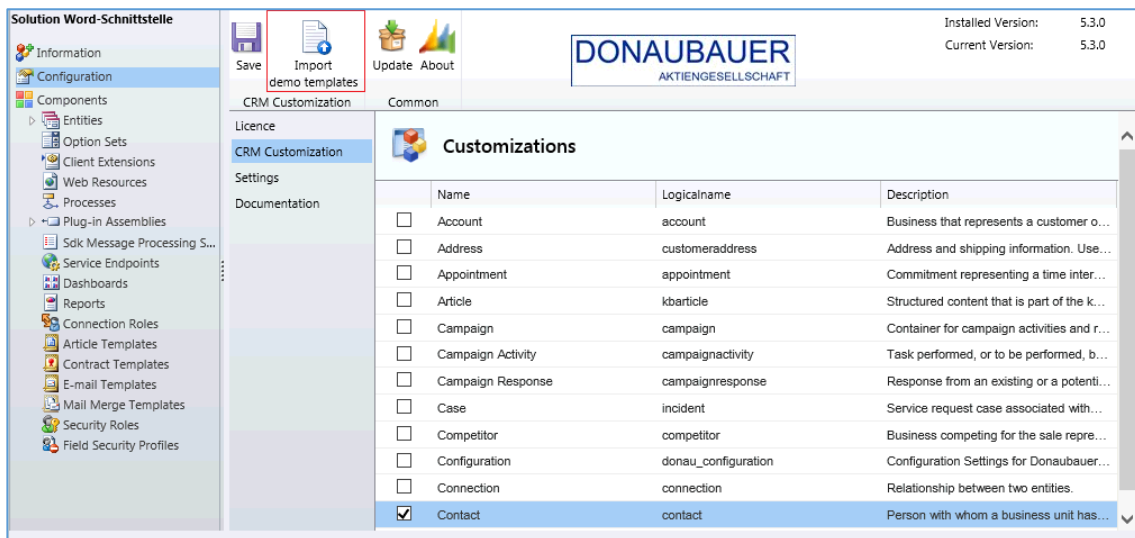
the CRM Word interface application is shown. The current license key is displayed here.

The “eventLog” entity does not list any entries so far. If errors appear while using the Word interface, they will be documented in this tool.

The entity “Word templates” manages Word templated created by you. Our user manual documents how to create these templates. So as to facilitate creating the templates, you will receive a demo template. Acitvate this template as follows.

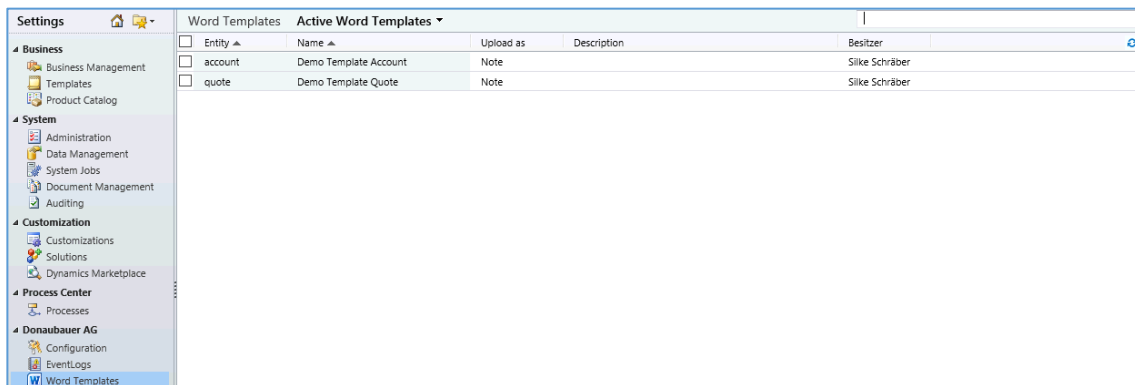
2.2.9. Importing demo templates

Open the solution of the Word interface (crmwordinterface) and at first click “CRM Customizations” and then click the “Import Demo Template” button.

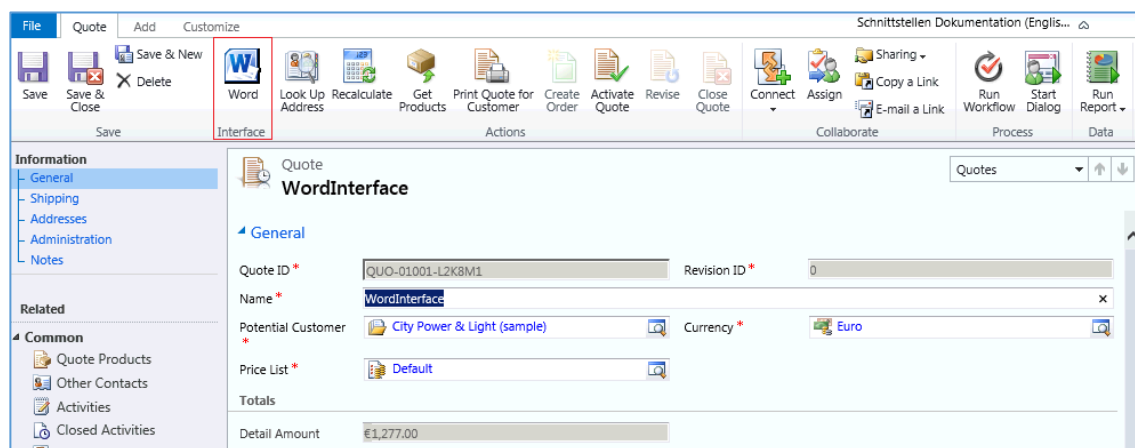


When the import was carried out successfully, click on the “Close” button.

The demo template can be found in the “Active Word templates” view.



The “Word button” is activated and displayed in all entities you selected (in our example: quotes).



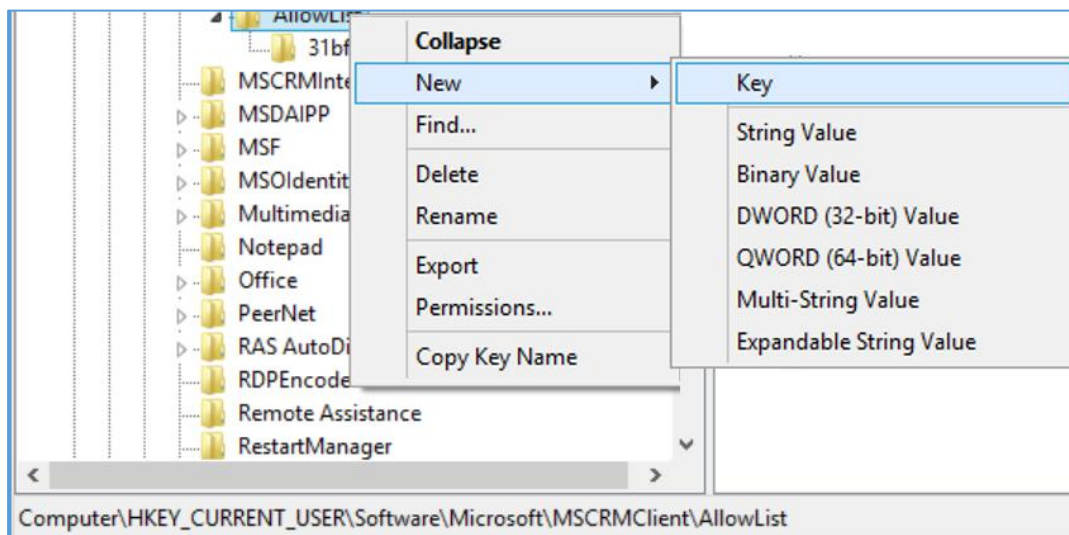
You may now use the Word interface.

2.2.10. CRM offline functionality

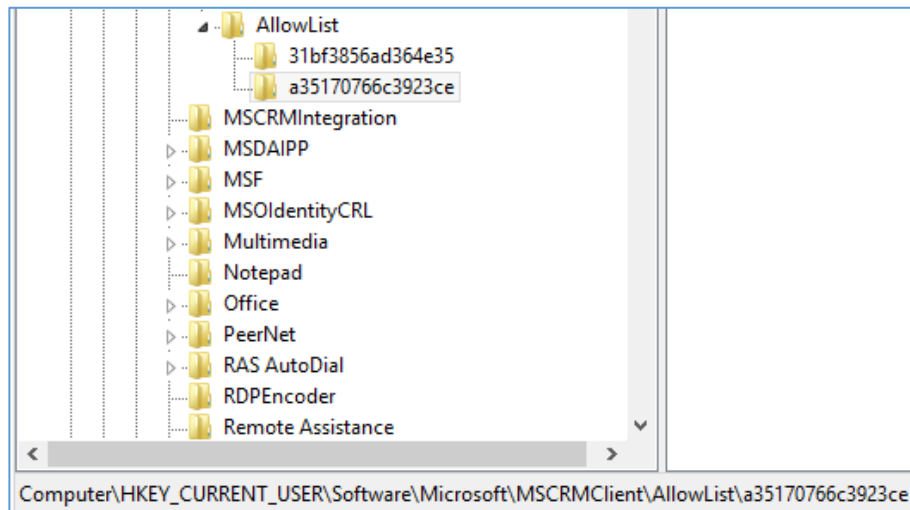
Our Word Interface can even be used offline. Only the plug-in of the CRM Word interface needs to be added in the AllowList of the CRM Outlook Client by an entry in the registry.

In order to use the offline functionality, please insert the following registration key into the registry:

HKEY_CURRENT_USER\Software\Microsoft\MSCRMClient\AllowList**a35170766c3923ce**



Now you can use the Word Interface offline as well.

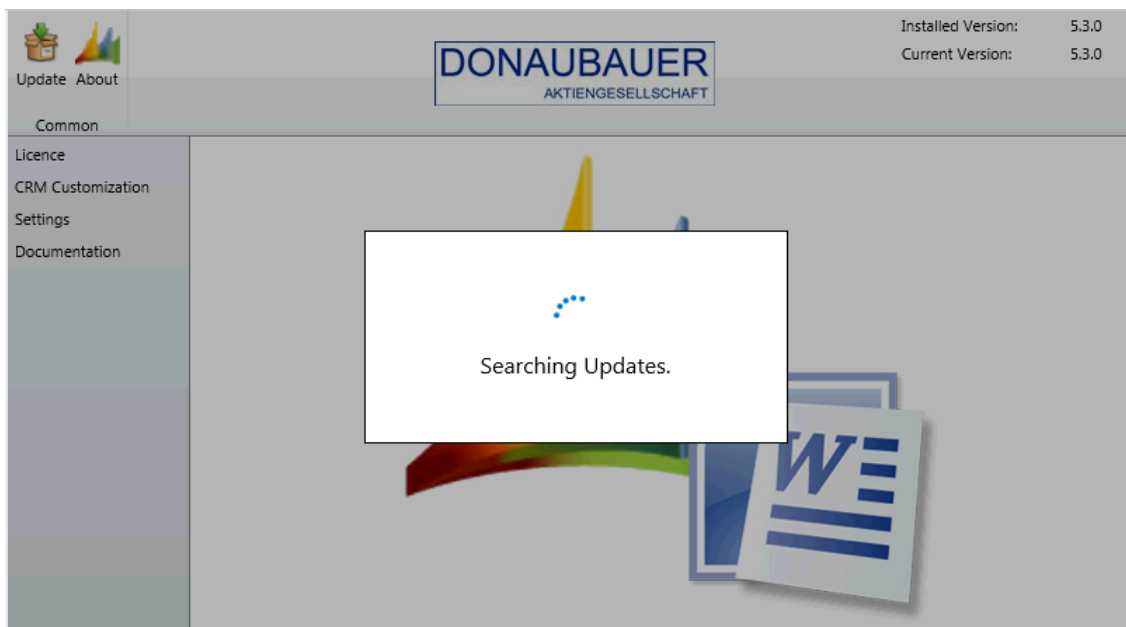


2.3. New update of the Word interface for Microsoft Dynamics CRM

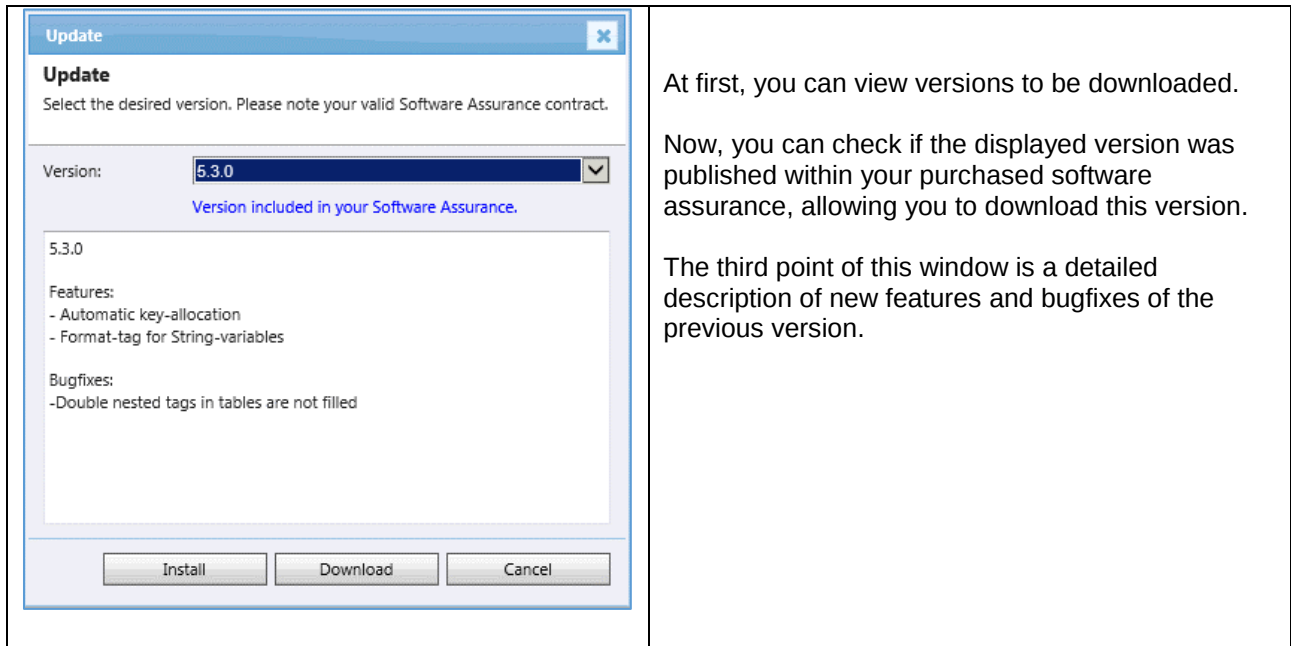
When a new update of our Word interface for Microsoft Dynamics is available for you, please proceed as follows:

In the sitemap of the navigation area of your Microsoft Dynamics CRM system, go to “Settings”, then activate the entity “Solutions” in the left application area and double click on “crmwordinterface”.

Just as for installing the interface, the following window opens up: in the upper right corner you can find information about the currently installed version and the latest version of the CRM Word Interface.

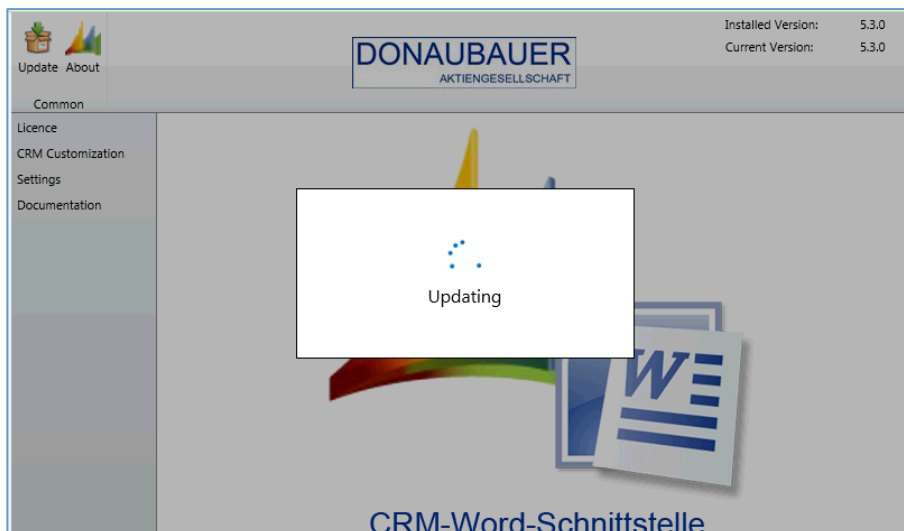


If your currently installed version is not the latest version of the interface, you can carry out an update by clicking on the “Update” button. The following window appears:



Now you may decide whether you want to directly install the new version or download the solution and install it manually at a later time.

The “Install” button directly imports the new version. You can use it shortly afterwards.



By clicking the “Download” button you can download the latest version as a zip file. Just in case the update should not be carried out, the routine can be stopped by the “Cancel” button.

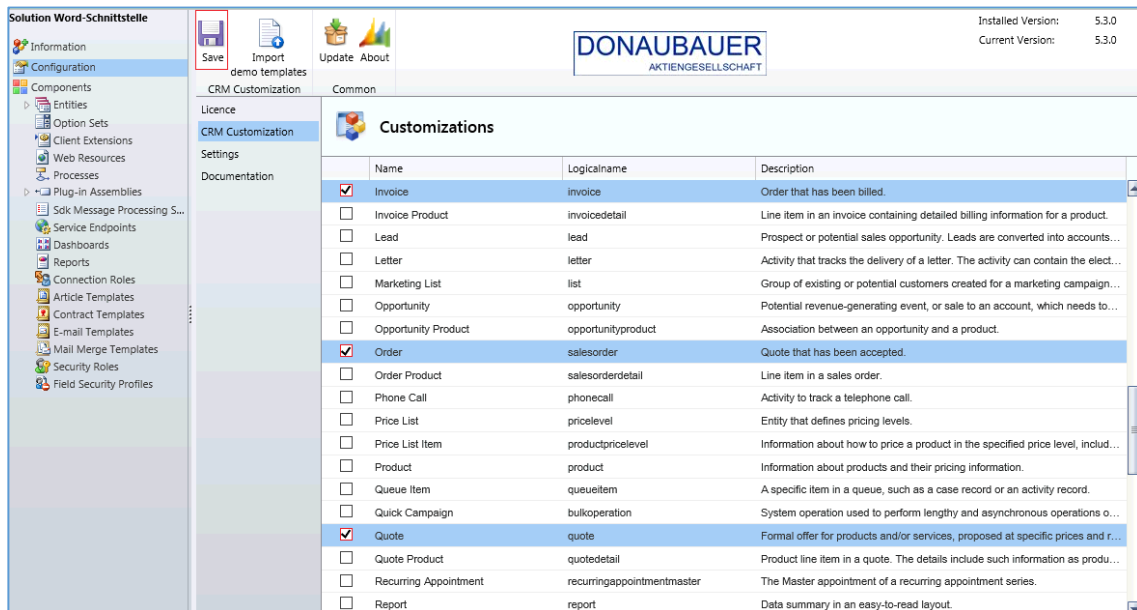
The installation of the update is now completed.

3. Uninstalling the Word interface

In order to deactivate the interface, please proceed as follows.

Just as for installing the Word interface, go to “Setting” in the sitemap in the navigation area of your Microsoft Dynamics CRM Systems, open the “Solution” entity in the left application area and double click on the “crmwordinterface” solution.

Within the menu item “CRM Customization”, in front of the displayed entity name, you will find a box. All entities used to create Word documents with the Word Interface are selected by ticking the respective box. Please un-tick all entities and



complete the process by clicking the “Save” button.

This process can take between a several seconds and a few minutes, depending on the system performance.

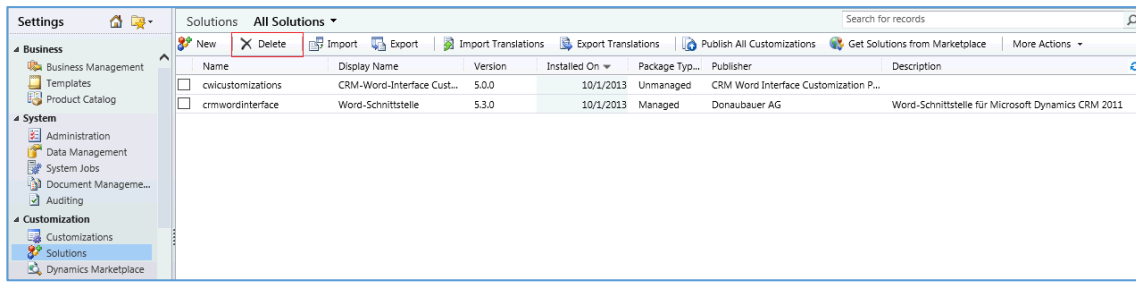
The next step is to remove the Bulkdelete Job, which was created during the process of installing the interface. Remove the Bulkdelete Job by clicking the respective button within the “Settings” menu item.

Now, the button label changes back into “Create Bulkdelete Job”.

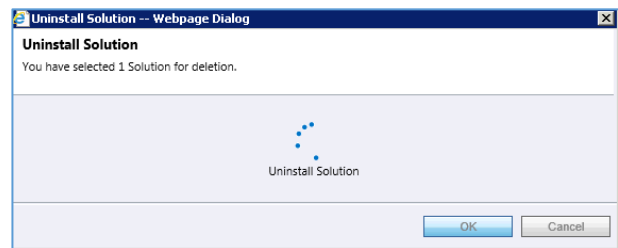
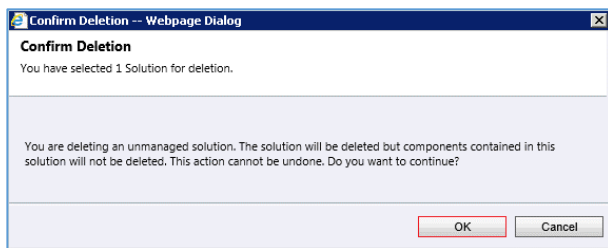


This completes all preparatory work for deleting the solution.

Subsequently, select the solutions “cwicustomizations” and “crmwordinterface” one by one in the “Solutions” entity and remove them with the “Delete” button in the toolbar.

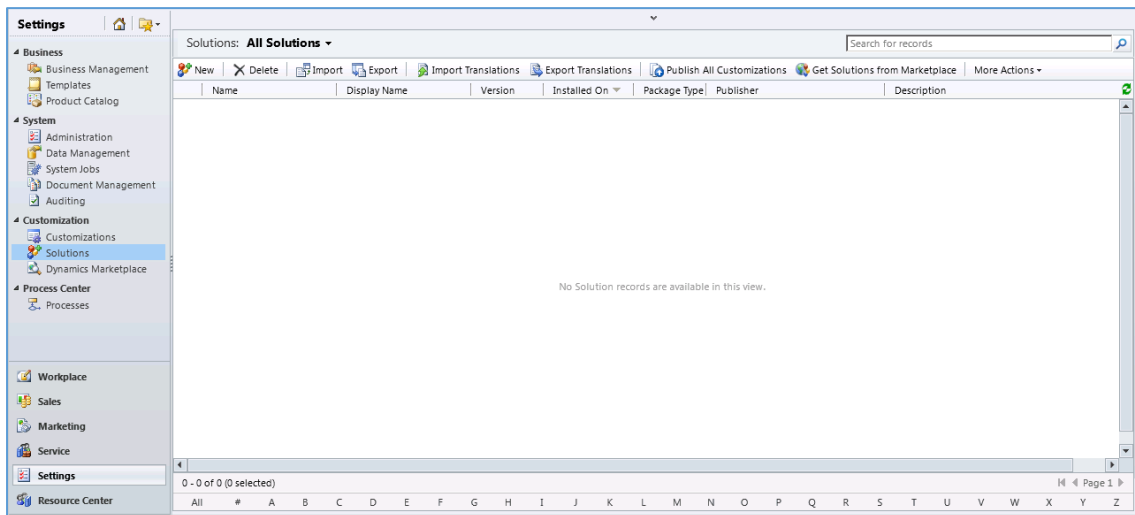


A correct order of deleting the solutions must not be considered.



Confirm this window with the “OK” button and the solution is being deleted.

After rebooting your system (Ctrl + F5), the section “Donaubauer AG” with the entities “Word templates”, “Configuration” and “eventLog” disappeared in the left application area.



Your Word interface is now uninstalled entirely.

Should you have any questions regarding the CRM Word interface 2011 or need further support, do not hesitate to contact us.



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