

# 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 <u>singularly</u> 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.

Settings 🛛 🟠 📴 -								/							
4 Business	Solution	s: All Sol	utions -							Search fo	Search for records				
🔖 Business Management	🐉 New	🗙 Delete	📑 Impor	t 🖫 Export	<u> j</u> import	Translations	🗟 Export Translatio	ns 🕴 👔 Publi	ish All Customizatio	ns   R Get Solu	tions from Marketplace	More A	ctions +		
Product Catalog	Nam	e		Display Name	•	Version	Installed On 🔻	Package T	ype Publisher		Description		3		
System     A System     Administration     Data Management     System Jobs     Document Management     Auditing													^		
Customization     Customizations     Solutions     Solutions     Dynamics Marketplace	No Solution records are available in this view.														
Process Center     Processes															
Sales															
🖒 Marketing															
🚳 Service													Ň		
Settings	0 - 0 of 0 (0	selected)										H	✓ Page 1 ▶		
🛐 Resource Center	All	# A	B C	DE	F G	ні	J K L	M N	O P Q	R S	T U V	w x	Y Z		

All current solutions of your CRM system are displayed here.

Now, click on the "Import" button in the toolbar.

Settings 🛛 🚮 📴 -						~						
4 Business	Solutions: All S	olutions -	Search fo	r records		٩						
🔖 Business Management	🐉 New 🛛 🗙 Delet	te 📑 Import	🖫 Export	👰 Import Tr	anslations	🗟 Export Translations	👔 Publish A	II Customizations	💸 Get Solu	tions from Marketplace	More Actions +	
Templates Product Catalog	Name		Display Name		Version	Installed On 🔻	Package Type	Publisher		Description		ø
A System     Administration     Data Management     System Jobs     Document Management     Additing												^
Customization     Customizations     Customizations     Solutions     Dynamics Marketplace						No Solution reco	ords are available	e in this view.				
Process center     Z. Processes												
🥵 Sales												
🖒 Marketing												
🔞 Service												~
Settings	0 - 0 of 0 (0 selected	0									► N 4 Page	1 🕨
Resource Center	All # A	B C	DE	FG	ні	JKL	M N G	D P O	R S	TUV	N X Y	z

#### 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.



lution Informatio	n			
Solution Informatio	'n			
Name:	Word-Schnittstelle			
Publisher:	Donaubauer AG(donaubauer)			
Package Type:	Managed			
View solution pack	age details			
		Back	Next	Çance



Import Solution - '	Windows Internet Explorer	
mport Options		🕜 <u>H</u> elp
Post Import Acti	ons	
Activate any	processes and enable any SDK message processing steps included in the solution.	
	<u>B</u> ack <u>N</u> ext	<u>C</u> ancel
		at 100% 🔹
Import Cu	istomizations Webpage Dialog	×
	Importing customizations. Please wait for the operation complete	to

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.

1 Ine import o	r solution: Word-Schnitt	stelle completed with	n warning.		
Date Time 🔻	Туре	Display Name	Name	Status	Description
13:05:59.49	SDK Message Pr	Donaubauer.Cr	Donaubauer.Cr	- <u></u>	
13:05:59.48	SDK Message Pr	Donaubauer.Cr	Donaubauer.Cr	<b>1</b>	
13:05:59.46	SDK Message Pr	Donaubauer.Cr	Donaubauer.Cr	<b>.</b>	
13:05:59.45	SDK Message Pr	Donaubauer.Cr	Donaubauer.Cr	<b>.</b>	
13:05:59.43	SDK Message Pr	Donaubauer.Cr	Donaubauer.Cr		
13:05:59.40	SDK Message Pr	Donaubauer.Cr	Donaubauer.Cr	<b>.</b>	
13:05:57.49	Dependencies C			2	
13:05:54.37	Security Role	CRM Word Inter	CRM Word Inter	<b>B</b>	Security role.
13:05:54.20	Security Role	CRM Word Inter	CRM Word Inter	<b>.</b>	Security role.
13:05:53.40	Client Extensions	Site Map			XML data used
13:05:53.27	SDK Message Pr	Donaubauer.Cr	Donaubauer.Cr	R.	
13:05:53.21	SDK Message Pr	Donaubauer.Cr	Donaubauer.Cr		
<				E)	>
					Id. d Page 1

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.

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Settings 🕼 🙀 -	Solutio	ons All	Soluti	ions 🔻										Se	arch for re	cords				ų
▲ Business	🐉 New	X De	elete	📑 Impor	t 🕠 Export	t   🖗	Import Tra	Inslation	is 📑 Expo	ort Transl	ations 🛛 👔	Publish Al	I Customizations	📢 Get S	olutions fr	om Marke	tplace	More	Actions 👻	
🔖 Business Management	Nam	e		Dis	olay Name		Version	n	Installed Or	τΨ	Package Typ	Publish	er		Descr	iption				e
Templates	<ul> <li>crmv</li> </ul>	vordinterfa	ice	Wo	rd-Schnittstelle	2	5.3.0		10/	1/2013	Managed	Donaut	bauer AG		Word	-Schnittste	elle für M	licrosoft D	Dynamics C	RM 2011
I Product Catalog																				
⊿ System																				
Administration     Data Management																				
System Jobs																				
Document Management																				
Auditing																				
▲ Customization																				
Customizations																				
Solutions																				
Processes																				
	-																			
Workplace																				
Sales																				
Marketing																				
Sanica																				
Service																				
Settings	1 - 1 of 1	. (1 selecte	d)																	I≪
Resource Center	All	#	А	в с	DE	E F	G	н	I J	к	L 1	a N	O P	Q R	s	т	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.

Solution: Word-Schnittstelle  Solution: Mord-Schnittstelle  Nou cannot directly edit the components within a managed solution. If the managed properties for solution components a									
Tou cannot directly eait the components within a managed solution. If the managed properties for solution components a from another unmanaged solution.									
Solution Word-Schnittstelle Information Configuration	Request Import	📸 🏄 Update About							
Components	Licence	Common							
Entities Option Sets	Licence		Licencing						
Client Extensions	Settings	10							

#### 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\* max@mustermann.de

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

Bitte lesen Sie vor Installation der Software namens Word-Schnittstelle für Microsoft Dynamics CRM 2011 diese Lizenzbedingungen aufmerksam durch. Dieser Endbenutzer-Lizenzvertrag (kurz "EULA" = End User License Agreement) ist ein rechtsgültiger Vertrag zwischen Ihrnen (eintweder als natürlicher oder juristischer Person) und der Donaubauer Aktiengesellschaft für das Ihrnen gelieftet und im vorab genannte Software-Produkt. Durch die Installation und Verwendung dieser Software erklären Sie sich mit den Bedingungen dieses Vertrages einverstanden.

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Die dieser Lizenzvereinbarung beigefügte Software darf nur verwendet werden, wenn Sie über eine gültige Lizenz für dieses-Produkt verfügen. Die Word-Schnittstelle für Microsoft Dynamics CRM 2011 ist Eigentum der Firma Donaubauer Aktiengeselischaft und ist uriebererchtlich geschlicht. Der Kunde erwicht mit dem Kauf der Lizenz das Recht, diese Software zu nutzen. Er erwirbt keinerlei Rechte an der Software selbst oder an der Donaubauer Aktiengesellschaft.

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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.

Continue Cancel

🧖 Licencing Licenceinfo Licencekey Organization Name Organization Id: Version: Licencetype Expirationdate Licencestatus . Licence invalid. Importing Licence Licencekey not found

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.

An email adress is required for the automatic license request. Additionally, you must accept the

terms of this agreement.



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.

izenzanforderung	
ür Ihre Lizenzanforderung wird Ihnen hiermit ein Text dargestellt, welchen Sie im A opieren. Übersenden Sie diesen Text bitte zur Lizenzerstellung an folgende E-Mail	nschluss bitte Adresse.
]izenzen@donaubauer.com	×
<pre><wordinterface> <orgname>Schnittstellen</orgname> <orgnanizationid>70fbe43c-0961-e011-ad1a-00155d007813 <vresion>5.3.0-(version&gt; </vresion></orgnanizationid></wordinterface></pre>	^
<expirationdate>2013-10-27</expirationdate> 	~
I	

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

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.

	: 🛺		Installed Version:	5.3.0
Request Import Updat	About	DONAUBAUER	Current Version:	5.5.0
Licence Licence	ie noodi	AKTIENGESELLSCHAFT		
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	Orangination Name			
	organization Name.	1		
	Organization Id:			
	Version:			
	Licencetype:			
	Expirationdate:			
	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.

EULA         X           EULA         Sie mässen den Bedingungen dieser Vereinbarung zustimmen, damit Sie den Vorgang fortsetzten können. Wenn Sie den Software-Lizenzbedingungen nicht zustimmen möchten, schließen Sie dieses Fenster und löschen die Lösung.           Wichtig!         Bitte lesen Sie vor Installation der Software namens Word-Schnittstelle für Microsoft Dynamics CRM 2011 diese Lizenzbedingungen aufmerksam durch.           Dieser Endbenutzer-Lizenzuber dag vor einster und Verscher Person) und der Donaubauer Aktiengesellschaft für das Ihnen (entweder als natürlicher oder juristischer Person) und der Donaubauer Aktiengesellschaft für das Ihnen geinterten und invorage pennkten Söftware-Produkt. Durch die Installation und Verwendung dieser Software erklären Sie sich mit den Bedingungen dieses Vertrages oder Teilen hiervon nicht einverstanden sein, dann brechen Sie die Installation hier ab und geben die Software dem Händler zurück, der Ihnen den Kaufpreis gemäß seinen Geschäftsbedingungen zurück erstatten wird.	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.
Die dieser Lizenzvereinbarung beigefügte Software darf nur verwendet werden, wenn Sie über eine gültige Lizenz für dieser-Produkt verfügen. Die Word-Schnittstelle für Microsoft Dynamics CRM 2011 ist Eigentum der Firma Donaubauer Aktiengesellschaft und ist uhreberrechtlich geschützt. Der Kunde erwirbt mit dem Kauf der Lizenz das Recht, diese Software zu nutzen. Er erwirbt keineriel Rechte an der Software selbst oder an der Donaubauer Aktiengesellschaft. Es ist nicht gestattet, Kennzeichnungen des Produktes zu entfernen oder zu modifizieren, sowie die Software	
Weiter Abbrechen	

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

Request Import Licence Licence	F 🏄 te About	DONAUE	BAUER	Installed Version: Current Version:	5.3.0 5.3.0
Licence Co	mmon				_
CRM Customization	🧖 Licencing				
Documentation	Licenceinfo		Licencekey		
	Organization Name: Organization Id: Version: Licencetype: Expirationdate:	Schnittstellen Dokumentation (Englisch 2b608d6e-e8c2-e211-97d9-00155d001 5.3.0 Enterprise	PFdvcmRJbnRlcmZhY2U+PG9yZ25hbWU+U2Nobml0 dGlvbiApRW5hbGl2Y2gpPC9vcmduYW1IPjxvcmdhbm 1IOGMyLWUyMTEtOTdkOS0vMDE1NWQwMDFiMJY3 JzaW9uPjUuMy4wPC92ZXJzaW9uPjx0eXBIPkVudGV	dHN0ZWxsZW4gRG9rd I6YXRpb25pZD4yYYwC 3L29yZ2FuaXphdGivbml ycHJpc2U8L3R5cGU+	W1lbnRh JGQ1ZS A kPjx2ZX

#### 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.

Save Import demo templates	Update A	bout	DONAUBAUER	Installed Version: 5.3.0 Current Version: 5.3.0
Licence CRM Customization		Customizations		
Documentation		Name	Logicalname	Description
Documentation		Contact	contact	Person with whom a business unit has a relationship, suc
		Contract	contract	Agreement to provide customer service during a specified
		Contract Line	contractdetail	Line item in a contract that specifies the type of service a
		Discount	discount	Price reduction made from the list price of a product or se
		Discount List	discounttype	Type of discount specified as either a percentage or an a
		Document Location	sharepointdocumentlocation	Document libraries or folders on a SharePoint server fro
		E-Mail Attachment	activitymimeattachment	MIME attachment for an e-mail activity.
		E-mail	email	Activity that is delivered using e-mail protocols.
		EventLog	donau_eventlog	
		Fax	fax	Activity that tracks call outcome and number of pages for
		Goal	goal	Target objective for a user or a team for a specified time
		Goal Metric	metric	Type of measurement for a goal, such as money amount
		Invoice	invoice	Order that has been billed.
		Invoice Product	invoicedetail	Line item in an invoice containing detailed billing informati
		Lead	lead	Prospect or potential sales opportunity. Leads are conver
		Letter	letter	Activity that tracks the delivery of a letter. The activity can
		Marketing List	list	Group of existing or potential customers created for a ma
		Opportunity	opportunity	Potential revenue-generating event, or sale to an account
		Opportunity Product	opportunityproduct	Association between an opportunity and a product.
		Order	salesorder	Quote that has been accepted.
		Order Product	salesorderdetail	Line item in a sales order.

Save Import demo templates CRM Customization Licence CRM Customization	be determined by the second se	DONAUBAUER AKTIENGESELLSCHAFT	Installed Version: 5.3.0 Current Version: 5.3.0
Documentation	Name	Logicalname	Description
Documentation	Invoice	invoice	Order that has been billed.
	Invoice Product	invoicedetail	Line item in an invoice containing detailed billing informati
	Lead	lead	Prospect or potential sales opportunity. Leads are conver
	Letter	letter	Activity that tracks the delivery of a letter. The activity can
	Marketing List		up of existing or potential customers created for a ma
	Opportunity	100	ential revenue-generating event, or sale to an account
:	Opportunity Product	· · ·	ociation between an opportunity and a product.
:	Order	Importing Customizations.	pte that has been accepted.
	Order Product		e item in a sales order.
	Phone Call		wity to track a telephone call.
	Price List	pricelevel	Entity that defines pricing levels.
	Price List Item	productpricelevel	Information about how to price a product in the specified
	Product	product	Information about products and their pricing information.
	Queue Item	queueitem	A specific item in a queue, such as a case record or an a
	Quick Campaign	bulkoperation	System operation used to perform lengthy and asynchron
	Quote	quote	Formal offer for products and/or services, proposed at sp
	Quote Product	quotedetail	Product line item in a quote. The details include such info
	Recurring Appointment	recurringappointmentmaster	The Master appointment of a recurring appointment series.
	Report	report	Data summary in an easy-to-read layout.
	Rollup Field	rollupfield	Field to be rolled up to calculate the actual and in-progres
	Rollup Query	goalrollupquery	Query that is used to filter the results of the goal rollup.

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:

Remove Bulkdelete Job	About	DON	AUBAUER ACTENDESELLSCHAFT
Licence CRM Customization Settings Documentation	Settings Logging Log Level	Information	The Log Level setting controls the types of messages being logged. Messages will be written to the eventing entity. The possible options are: Off - No messages are logged. Error - Off were messages are logged.
	Tracing Tracing Level Tracing Categories	5	Warninn         - Front and warninn messanes are lonned           Tracing is used to gather detailed information for debugging purposses.           The Tracing Level setting specifies the level of detail. A higher value produces more tracing information.           The Tracing Categories setting specifies a number of categories to focus on. The value is calculated by adding up the value of all setted categories. Following categories: are available:           Timing(1), Parameters/2), Results(4), Variables(8), Controllflow(16), Licence(32) and Other(64).
	Document Settings		
	Remove Tags?	Ø	This Option determins if the CRM-Word-Interface removes the RichText Controlls used in the template. This enables application that do not support this feature to display the document. Leaving the controlls in the document will enable further processing based on those controlls.
	TemplateExplorer Settin	gs	
	TemplateExplorer size	500,500 ×	This setting controlls the Template Explorers initial size. The Annotation is Width, Height. Values are in Pixel. The default value is 400,390.

Log Level:	entity. The possi Off: Error: Warning: Information:		<ul> <li>options are:</li> <li>lo messages are logged.</li> <li>)nly error messages are logged.</li> <li>:rror and warning messages are logged.</li> <li>(Il messages are logged.</li> </ul>						
Tracing Level:	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 Categori	es:	The Trac calculate available and Othe	ing Categories setting specifies a number of categories to focus on. The value is d by adding up the values of all selected categories. Following categories are : Timing (1), Parameters (2), Results (4), Variables (8), Controllflow (16), Licence (32) er (64).						
Template Explore	er Size: T	his setting are in Pix	g controls the Template Explorers initial size. The Annotation is Width,Height. Values kel. 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".

Remove Bulkdelete Job	📩 Update	About		DONAUBAUER	Installed Version: Current Version:
Settings	Comr	mon			
Licence		73.			
CRM Customiza	tion	X	Settings		
Settings					

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".

Settings 🛛 😭 🙀 -	Solutio	ns All S	olutions	s <b>•</b>												T							\$	ρ
▲ Business	🐉 New	X Dele	ete 🛛 📑	Import	🖫 Export	🦻 I	mport Trai	nslations	s 📑 E	ort Trans	lations		Publish A	All Custor	nizations	; 🚯 G	Get Solu	tions fi	om Mar	ketplace	More	Actions 👻		
🔖 Business Management	Nam	e		Displa	ay Name		Version		Installed	On 👻	Packag	е Тур	Publis	her				Desc	iption					е
Templates	cwicu	ustomization	15	CRM-	Word-Interfac	e Cust	5.0.0		:	10/2/2013	Unman	aged	CRM V	Word Inte	rface Cu	stomizati	ion P							
Product Catalog	crmv	ordinterface	2	Word	-Schnittstelle		5.3.0		:	10/2/2013	Manag	ed	Donau	ubauer A(	5			Word	-Schnitt	stelle für I	Vicrosoft [	ynamics (	RM 2011	_
▲ System																								_
Administration																								
Oata Management																								
System Jobs																								
Auditing																								
4 Curtomization																								
2 Solutions																								
Dynamics Marketplace																								
4 Process Center																								
🕄 Processes																								
4 Donaubauer AG																								
Configuration																								
EventLogs																								
Word Templates																								
Workplace																								
Sales																								
Marketing																								
Service																							>	_
Settings	1.2 of 2	(0 selected)																				н	Page 1	
Resource Center	All	# A	А В	с	D E	F	G	н	I J	к	L	м	N	0	Р	QI	R	s	т	U V	w	x	Y Z	_

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

Solution: CRM-Word-Inte	rface Customization Solution					
Solution CRM-Word-Interface Cu	Component Type All		·			
🐉 Information	New - 🔀 Add Existing - 🗙 Delete	Remove 🔒 💦 Publish	Show Dependencies	📑 Add Require	ed Components	
Components	Managed Properties					
Option Sets	Display Name 🔺	Name	Туре	State	Customizable	Descriptic 🥹
Client Extensions	Contact	contact	Entity	Managed	True	Person with
Web Resources	Invoice	invoice	Entity	Managed	True	Order that h
Frocesses	Order	salesorder	Entity	Managed	True	Quote that h
Plug-in Assemblies     Sdk Massage Processing S	Quote	quote	Entity	Managed	True	Formal offer
Service Endpoints						
Dashboards						
Reports						
Connection Roles						
Article Templates						
Contract Templates						
Anil Merce Templates						
Security Roles						
Eield Security Profiles						

#### 2.2.7. The "Configuration" entity

The "Configuration" entity contains certain items.

Here, you can see your current license key

Save Save & Save Save Save Save Save Save Save Save	we & New Sharing - eactivate Copy a Link elete E-mail a Link Collaborate	Run Start Workflow Dialog R Process	Run Report - Data				
Configuration	on ey					Configuration	•
General							^
Name *	LicenceKey			Application *	CRM Word Interface		~
				Parent			Q
Data							
Data Type	Multiple Lines of text		~				
Value (Multiple Lines of Text)	PFdvcmRIbnRIcmZhY2U+PG9y OGMyLWUyMTEtOTakoSoWh PmFQQUITNI2Q9NVXcNTTU Q011Q2NscCVKN24vMTakMm TFFkTm9YRGIEVmFrMjluYXp6f eUZZRUJJVTJEdGxuMI	:Z25hbWU+U2Nobml0d DE1UWQwMDFIMJY8L zQ0pGODZHTicdYWM0 dpODaxa2ZiBTBIGLIa VXY3dGxyMVZrWU8wY2 	iHN0ZWxsZW4gRG9 i9yZ2FuaXphdGivbml WTNuQ3pDaGcwY0E TU1bm850EY5SEJM 2t3aWFILzZWNFdCTT	dW1lbnRhdGlvbiAoRW KPJx22XV2aW9uPJUuMy zTDBLdmU0S3pNVXIIO JnpXNDBJVHjaIN38IZStj IUVEFNcEw1TFNRdGJn	5nbGlzY2gpPC9vcmdu/W1IPJivcmdh 4wPC92ZXJzaW9uPjix0eXBIPK/udGWy EZ4zzix51pBdZZMetEX/VENDJYnV c2ISUJINMWhnUkI4Myt3TDUwUkRmi QTA0RUxaYWsxUER1dDNOWFFIVEJF3	bml6YXRpb25pZD4yYJYwOG HIpc2U8L3R5cGU + PFNp22t GdMvbPnTnApcBlIYU9awW WUXRRGpidI91WFI5UE9NWn KxLWa0V2MJ8meGtVcFh4dG	GQ1Z51I 5hdHVy /hoQk9t iRwN2pr 90ZTZV

as well as your settings determined in the "Settings" menu item.

Settings 🚮 🙀 -	Cont	figuration	AIL	Donau	bauer A	G Confi	igurati	ons 🔻											Sei	arch for	records	s					
4 Business		pplication 🔺		Nam	ie ≜						V	/alue															ø
Business Management	🗌 ci	RM Word In	terface	Licer	nceKey						P	FdvcmR	JbnRicn	nZhY2U	+PG9yZ	25hbW	U+U2No	bmi0dH	ΗN								
Templates	🗆 ci	RM Word In	terface	Logi	evel						3																
Product Catalog	🗆 ci	RM Word In	terface	Rem	ioveTags						т	rue															
₄ System	CI	RM Word In	terface	tem	plateexplo	orersize					5	00,500															
Administration	🗆 ci	RM Word In	terface	Trac	ingCatego	ories					1	27															
🚰 Data Management	🗆 ci	RM Word In	terface	Trac	ingLevel						5																
System Jobs																											
Auditing																											
4 Customization																											
Customizations																											
🜮 Solutions																											
🖄 Dynamics Marketplace																											
▲ Process Center																											1
🛃 Processes																											1
4 Donaubauer AG																											
Configuration																											
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word remplates																											
Workplace																											
Sales																											
Marketing																											
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settings	1-60	of 6 (0 select	ed)																						М		1 🕨
Resource Center	All	#	А	В	C D	E	F	G	н	Ι	J	К	L	М	Ν	0	Ρ	Q	R	S	T	U	٧	W	х	Υ	Z

### 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.

Solution Word-Schnittstelle  P Information Components C	Save Import demo templates CRM Customization Licence CRM Customization Settings	Update About Common	DONAUBAUER	Installed Version: 5.3.0 Current Version: 5.3.0
Web Resources     Processes     Processes     Solve Assemblies     Solve Assemblies     Solve Assemblies     Solve Assemblies     Solve Assemblies     Article Templates     Contract Templates     Article Templates     E-mail Templates     Solve Article Solve Assemblies     Sol	Documentation	Name       Account       Address       Appointmen       Article       Campaign       Campaign A       Campaign F       Case       Competitor       Configuration	Logicalname Logicalname account customeraddress tu appointment kbarticle campaign Activity campaignactivity Response campaignactivity Response incident competor	Description           Business that represents a customer o           Address and shipping information. Use           Commitment representing a time inter           Structured content that is part of the k           Container for campaign activities and r           Task performed, or to be performed, b           Response from an existing or a potenti           Service request case associated with           Business competing for the sale repre           Configuration Settings for Donsubauer
		Connection	connection contact	Relationship between two entities.



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

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

Settings 🛛 🖓 🖳 -	Word Templates	Active Word Templates 🔻			1	
4 Business	Entity 🔺	Name 🔺	Upload as	Description	Besitzer	e
Business Management	account a	Demo Template Account	Note		Silke Schräber	
Templates	quote	Demo Template Quote	Note		Silke Schräber	
Product Catalog						
▲ System Administration → Data Management System Jobs → Document Management → Auditing						
Customization     Customizations     Solutions     Dynamics Marketplace						
₄ Process Center						
Processes						1
▲ Donaubauer AG						
R Configuration						
LeventLogs						
Word Templates						

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

File Quote Add Custor	mize					Schnittstellen Do	kumentation (Englis	۵
Save & New Close	Word Look Up Reca	alculate Products	or Create Order Quote	Revise	Close Quote Connect	Assign	Run Workflow	Run Report +
Save	Interface	Actions				Collaborate	Process	Data
Information – General – Shipping	Quote WordInt	terface					Quotes	• • •
- Administration	General							^
L Notes	Quote ID *	QUO-01001-L2K8M1		Re	evision ID *	0		
Related	Name *	WordInterface						×
▲ Common	Potential Customer	🕒 City Power & Light (sam	ple)	🗔 Cu	urrency *	💐 Euro		Q
Quote Products	Price List *	Default		Q				
Activities	Totals							
Closed Activities	Detail Amount	€1,277.00						

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* 

4	31bf	Collapse		1.0-
<b>)</b> ]] N	ISCRMInte	New	•	Кеу
		Find		String Value
→ - <mark>  </mark> N	ISOIdentit	Delete		Binary Value
⊳ - <u>]]</u> N	1ultimedia	Rename		DWORD (32-bit) Value
	lotepad Office eerNet	Export Permissions		QWORD (64-bit) Value Multi-String Value
Þ - 📕 R	AS AutoDi DPEncode	Copy Key Name		Expandable String Value
	Remote Assistance RestartManager			
R			~	
<			>	
Computer\HKEY_CURRE	ENT_USER\Softw	vare\Microsoft\MSCR	MClient\A	llowList

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:

Update Update Select the desir	red version. Please note your valid Software Assurance contract.	At first, you can view versions to be downloaded.
Version:	5.3.0	Now, you can check if the displayed version was published within your purchased software assurance, allowing you to download this version.
5.3.0 Features: - Automatic ka - Format-tag f Bugfixes: -Double neste	ey-allocation for String-variables ed tags in tables are not filled Install Download Cancel	The third point of this window is a detailed description of new features and bugfixes of the previous version.

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

Solution Word-Schnittstelle 27 Information Configuration	Save Import demo templates	Update A	bout	DONAUBAUER	Installed Version: 5.3.0 Current Version: 5.3.0
Components The function of the function of	CRM Customization Licence CRM Customization	Commo	Customizations		
Web Resources  Processes	Documentation		Name	Logicalname	Description
+ Plug-in Assemblies	Documentation		Invoice	invoice	Order that has been billed.
Sdk Message Processing S			Invoice Product	invoicedetail	Line item in an invoice containing detailed billing information for a product.
Dashboards			Lead	lead	Prospect or potential sales opportunity. Leads are converted into accounts
Reports			Letter	letter	Activity that tracks the delivery of a letter. The activity can contain the elect
Connection Roles			Marketing List	list	Group of existing or potential customers created for a marketing campaign
Contract Templates			Opportunity	opportunity	Potential revenue-generating event, or sale to an account, which needs to
E-mail Templates	:		Opportunity Product	opportunityproduct	Association between an opportunity and a product.
🔛 Mail Merge Templates			Order	salesorder	Quote that has been accepted.
Field Security Profiles			Order Product	salesorderdetail	Line item in a sales order.
			Phone Call	phonecall	Activity to track a telephone call.
			Price List	pricelevel	Entity that defines pricing levels.
			Price List Item	productpricelevel	Information about how to price a product in the specified price level, includ
			Product	product	Information about products and their pricing information.
			Queue Item	queueitem	A specific item in a queue, such as a case record or an activity record.
			Quick Campaign	bulkoperation	System operation used to perform lengthy and asynchronous operations o
			Quote	quote	Formal offer for products and/or services, proposed at specific prices and $\ensuremath{r}\xspace\ldots$
			Quote Product	quotedetail	Product line item in a quote. The details include such information as produ
			Recurring Appointment	recurringappointmentmaster	The Master appointment of a recurring appointment series.
			Report	report	Data summary in an easy-to-read layout.

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".

Create Bulkdelete Job Settings	Update Com	About		DONAUBAUER	Installed Version: Current Version:
Licence CRM Customiza Settings	tion	R	Settings		

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.

Settings 🛛 😭 🙀 -	Solutions All Solutions  Search for records	ρ
▲ Business	🌮 New 🗙 Delete 📑 Import 🖏 Export   👰 Import Translations 🛝 Export Translations   🎧 Publish All Customizations 🚳 Get Solutions from Marketplace   More Actions 🗸	
🕸 Business Management	Name Display Name Version Installed On v Package Typ Publisher Description	0
Templates	cwicustomizations CRM-Word-Interface Cust 5.0.0 10/1/2013 Unmanaged CRM Word Interface Customization P	
Product Catalog	crmwordinterface Word-Schnittstelle 5.3.0 10/1/2013 Managed Donaubauer AG Word-Schnittstelle für Microsoft Dynamics CRM 2011	
4 System 2 Add Management 3 Occument Management 3 Occument Management 4 Outsomizations 5 Solutions 2 Solutions 3 Outsomizations 3 Outsomised Marketplace		

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

🛃 Confirm Deletion Webpage Dialog 🛛 🛛 🔀	🕘 Uninstall Solution Webpage Dialog 🛛 🔀
Confirm Deletion	Uninstall Solution
You have selected 1 Solution for deletion.	You have selected 1 Solution for deletion.
You are deleting an unmanaged solution. The solution will be deleted but components contained in this solution will not be deleted. This action cannot be undone. Do you want to continue?	Uninstall Solution
OK Cancel	OK Cancel

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

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

Settings 🚮 📴 -	· ·	
4 Business	Solutions: All Solutions - Search for records	c
🙀 Business Management	🌮 New 🛛 🗙 Delete 🛛 📑 Import 🖏 Export 🛛 🗿 Import Translations 🔍 Export Translations 🔹 Deletions I 👔 Publish All Customizations 🚳 Get Solutions from Marketplace 🛛 More Actions -	
Product Catalog	Name Display Name Version Installed On 🕆 Package Type Publisher Description	2
System     Administration     Data Management     System Jobs     Document Management     Additing		-
Customization     Customizations     Solutions     Dynamics Marketplace		
▲ Process Center ₽ Processes	No Solution records are available in this view.	
💰 Workplace		
崎 Sales		
🏠 Marketing		
🚳 Service		-
🐔 Settings	4	
S Resource Center	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	

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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Additional information on the Word-Interface: www.crmwordschnittstelle.de

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