



# CRM Word-Interface

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User manual

CRMWordinterface – for Microsoft Dynamics CRM2011

Version 5.3.0

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## 1. Preface

Thank you for choosing our [CRM Word-Interface 2011!](#)

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.

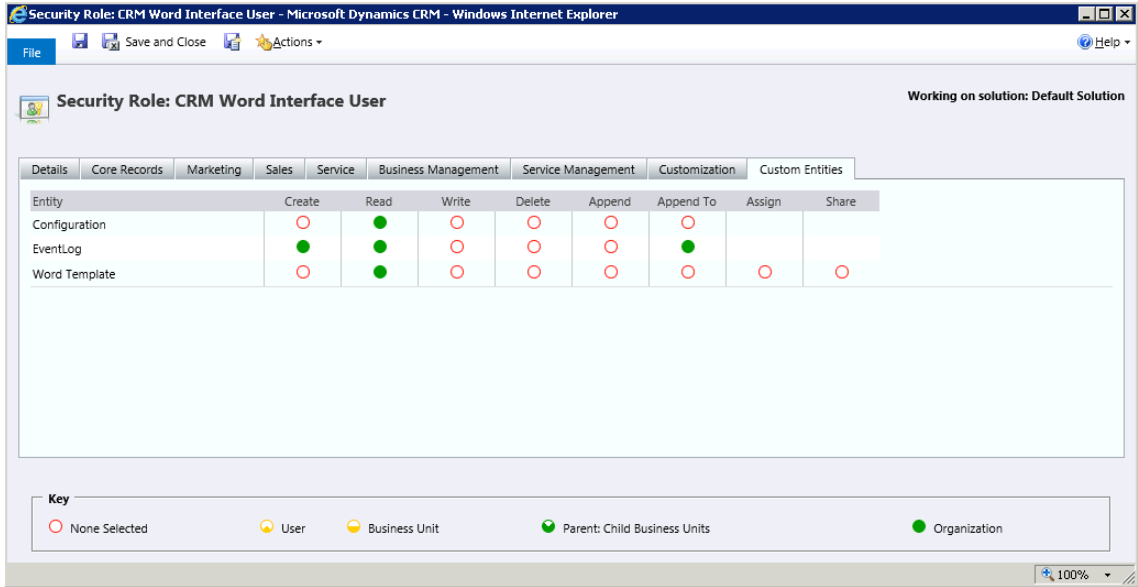
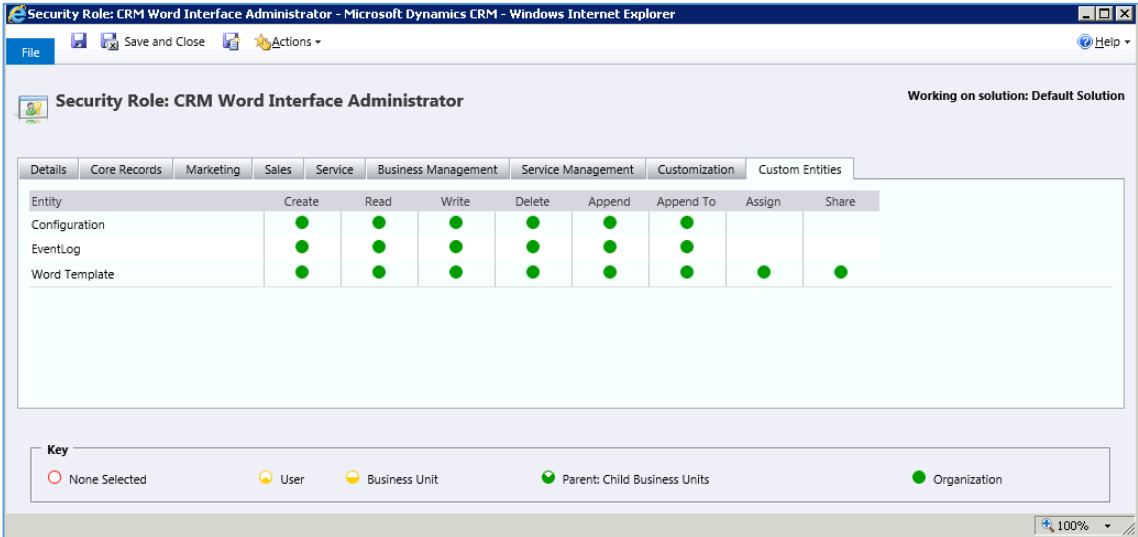
The CRM Word-Interface is an [add-on for Microsoft Dynamics CRM 3.0 and 4.0](#) as well as [Microsoft Dynamics 2011](#).

In the following pages you will find detailed instructions on installing and configuration details for version 5.2.0 of the Microsoft Dynamics CRM 2011 Word-Interface.

## 2. Rights and security

For accessing and working with the Word-Interface, the CRM end user requires the access rights to notes and the entity “Word template”. These rights are defined in the security roles.

Microsoft Dynamics CRM 2011 offers two preset security roles. It distinguishes between the CRM Word-Interface administrator and the CRM Word-Interface User.



Hence, all necessary rights and securities are preinstalled and do not need be separately defined.

### 3. CRM 2011 Metadata Browser

Since Microsoft Office tags are limited to 64 characters, it may happen that the complete tag does not fit into the corresponding field. In this case, you can use the entity number instead of the entity name.

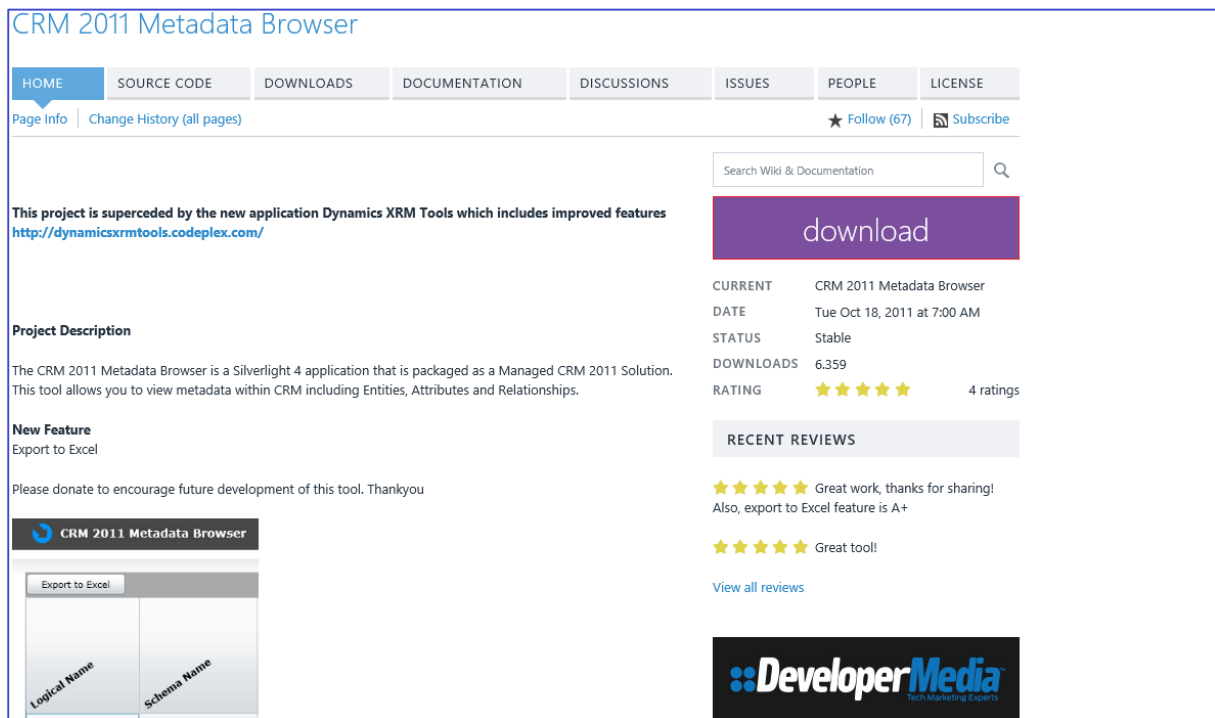
So as to look up the entity numbers, you need to install the CRM 2011 Metadata browser. It is available via the URL

<http://crm2011metabrowser.codeplex.com/>

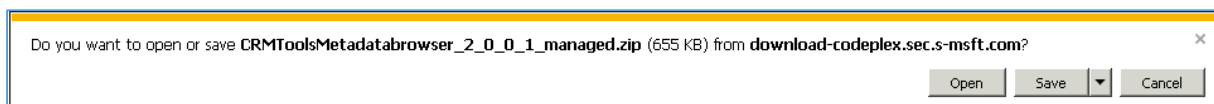
and has to be installed by a person equipped with the right to import solutions onto your system.

The installation proceeds as follows:

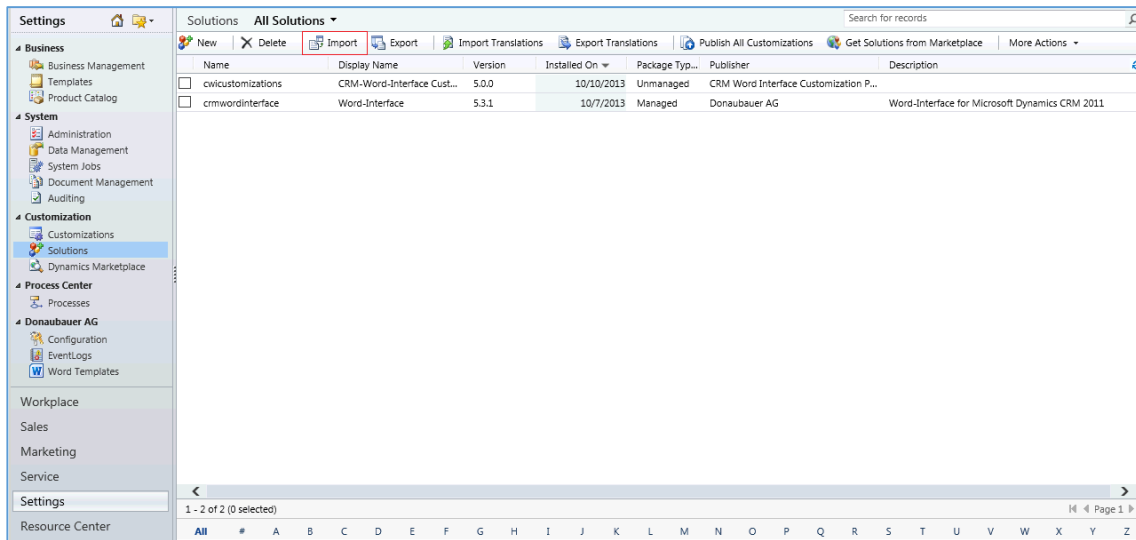
Go to the corresponding internet site,



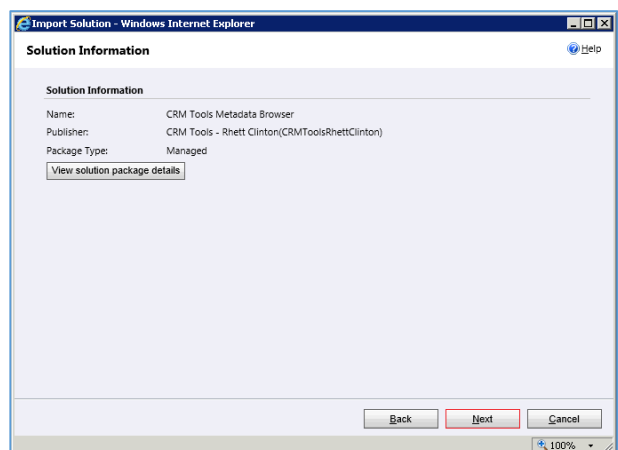
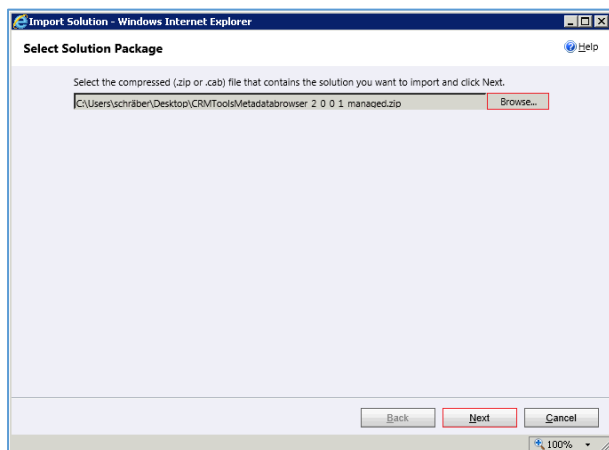
and save the solution to your system.



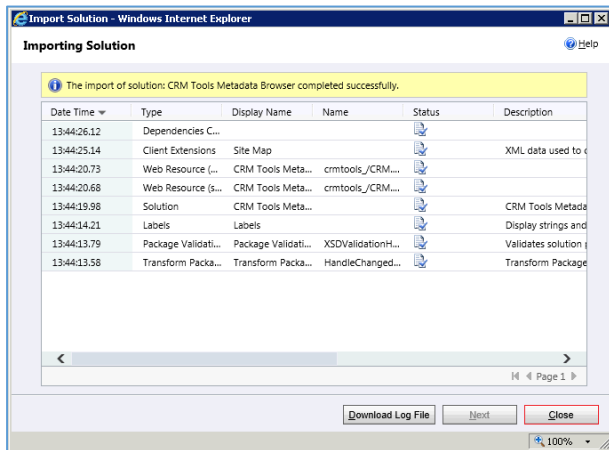
Now, in your Microsoft CRM system, in the lower site map, got to “Settings”, menu item “Solutions”



and import the solution by clicking the "Import" button in the menu bar as you did with the Word-Interface solution itself.

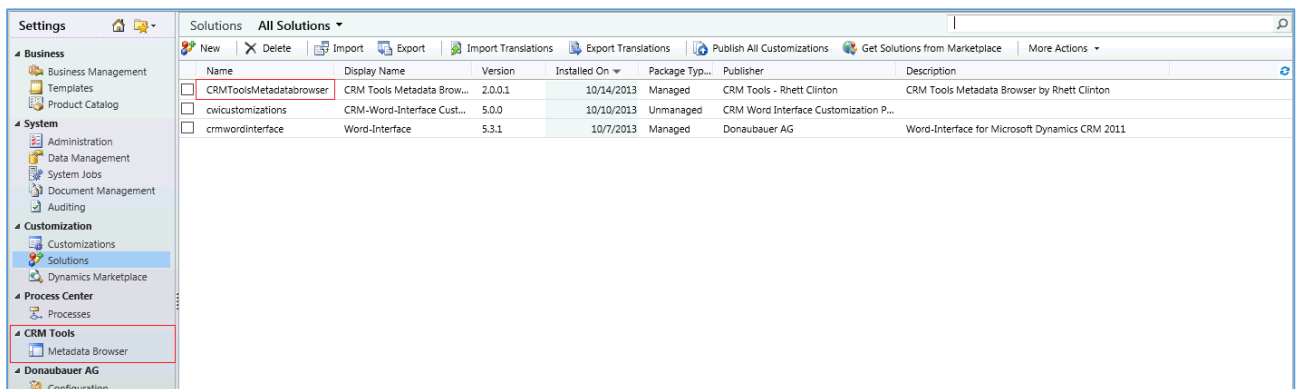


Select the solution by clicking the "Browse" button. Then, use the "Next" button to import the file.

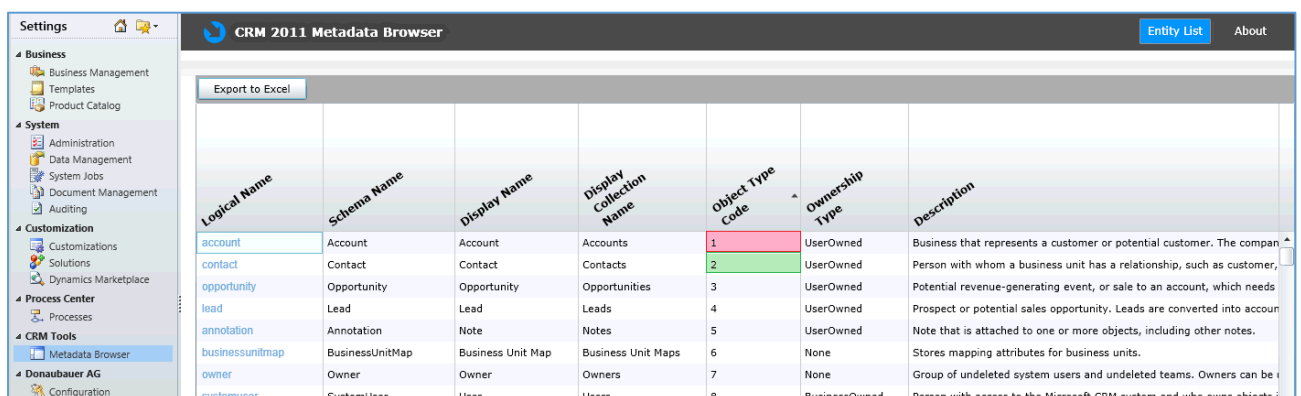


This process is finished as the event log appears.

The new imported solution is, together with the CRM Word-Interface solutions, displayed in the "Solutions" entity. A new entity is added to the site map.



This entity shows the CRM 2011 Metadata Browser's data in the work area.



Example: Tag for salutation:

without replacement: customerid.account.primarycontactid.contact.salutation  
 with entity number: customerid.1.primarycontactid.2.salutation

Please note that the entity numbers of the user-defined entities vary according to the system. For example, if you create templates in a test system, it will be necessary to re-adjust the templates in the live system with regard to the entity numbers.

Alles weiter

For any other information on tagging, see item [Vorlagenerstellung](#) in this user manual.



## 4. Template management

During the configuration of the CRM Word-Interface 2011, an entity was generated in the “Settings” field. This “Word templates” entity is used to manage the templates.

### 4.1. Entity “Word templates”

The “Word templates” entity can be found in the “Settings” field and contains one record per entity. It displays all entities which are available or were created.

The list view shows the entity for which the template was created. The display name corresponds to the schema name of the respective entity.

The standard version of the Word-Interface permits one template per entity maximum. The enterprise version can create any number of templates per entity.

Entity	Name	Upload as	Description	Besitzer
quote	Demo Template	Note		Silke Schröder
quote	Performance quote	Note		Silke Schröder
quote	product quote	Note		Silke Schröder

1 - 3 of 3 (0 selected) Page 1 of 1

## 4.2. Adding and management of a template

Use the “New” button in the menu bar to generate a new template record.

After opening the window (see below), please fill in the following fields:

### Field: Name

Assign an unambiguous name in order to help the end user to identify the template appropriate to his request. This is particular import if there are multiple templates per entity.

### Field: Entity

Please enter the schema name of the entity for which the template applies.

### Field: Description:

In this field, you can write a description the template. It will be displayed to the end user as tooltip in the template explorer.

### Field: Upload as:

Here, you can choose, whether the document generated by the Word-Interface should be saved in Microsoft Dynamics CRM as a note, a letter or to the SharePoint. This is important in conjunction with the “Upload” button.

### Section „Add new note“

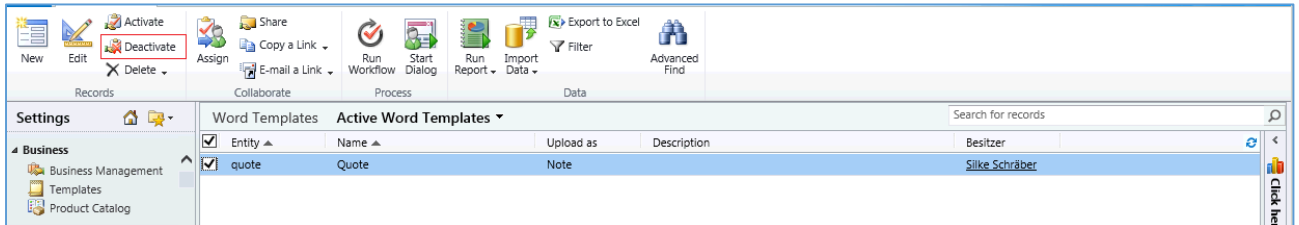
The original word template (.docx document) is attached to the template record. Whenever the .docx template is changed, the document has to be changed in the note field of the template record.

*If the desired template is not available in the template explorer, please make sure you used the correct schema name of the entity with correct spelling.*

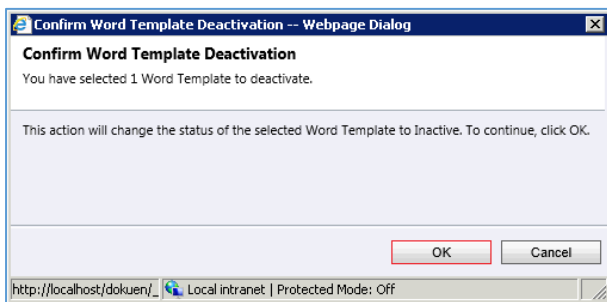
## 4.3. Deactivation of templates

The end user can only select active templates.

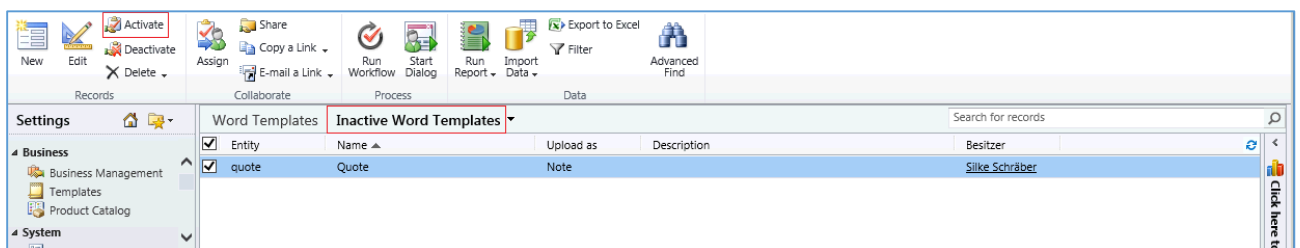
Templates can get an “inactive” state. Therefore, select (or open) the corresponding word template record and click the “Deactivate” button in the menu bar



and confirm the dialog by clicking the “OK” button.



The word template set as “inactive” is located in the “inactive Word Templates” view



and can be re-activated and again be used by clicking on the “Activate” button in the menu bar at any time.

## 5. Creating a template

### 5.1. Requirements

#### 5.1.1. Basic knowledge

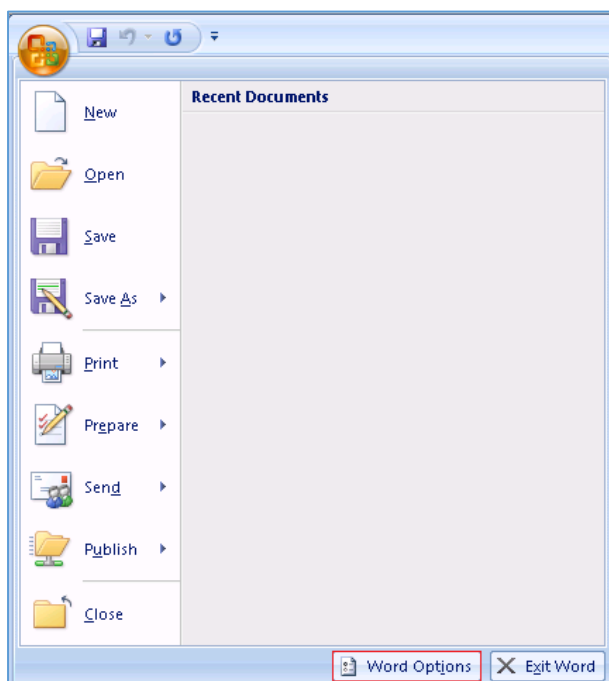
The person creating the templates should have a basic knowledge about entities, attributes and linked records, this means that he or she knows where schema names can be looked up and understands how entities are connected with each other

#### 5.1.2. Tools

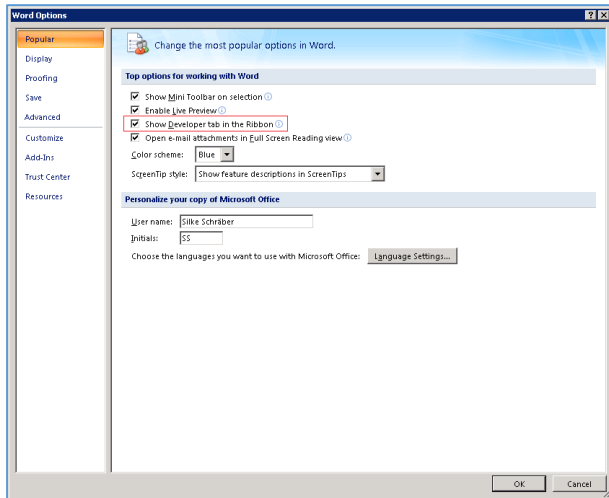
The CRM Word-Interface 2011 templates can be created from [Microsoft Office 2007](#) upwards and have to be saved as `.docx` (not in compatibility mode), since the necessary content controls are only available under these requirements.

In order to generate templates, activate the developer tools as follows:

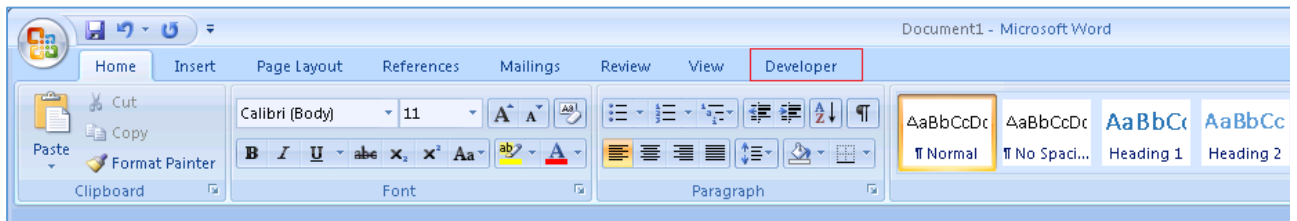
#### Microsoft Office 2007



Open the Word settings with the pearl, tick the Button "Word Options",

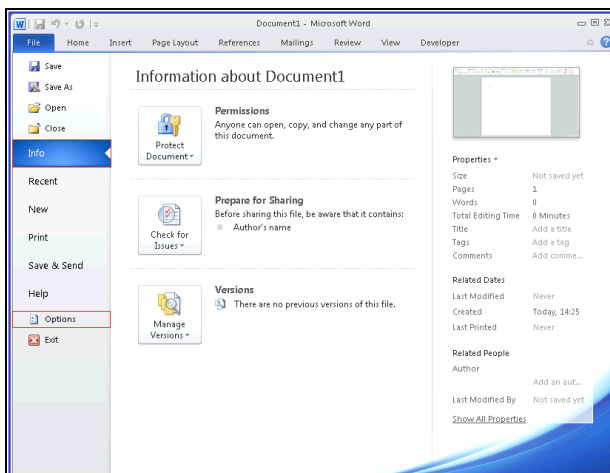


and tick “show Developer tab on the ribbon”.

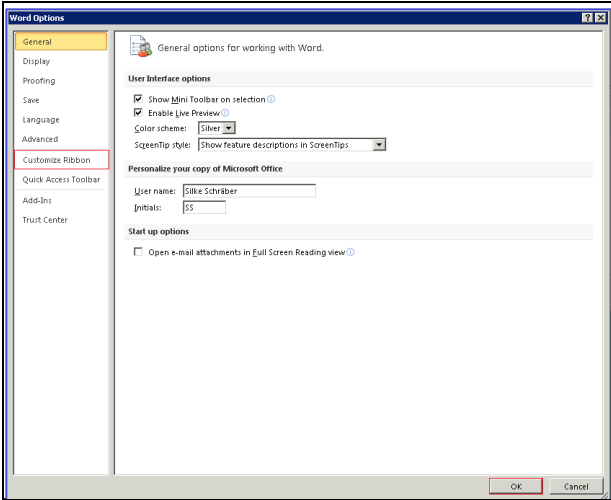


Your ribbon now includes the “Developer tools“ tab.

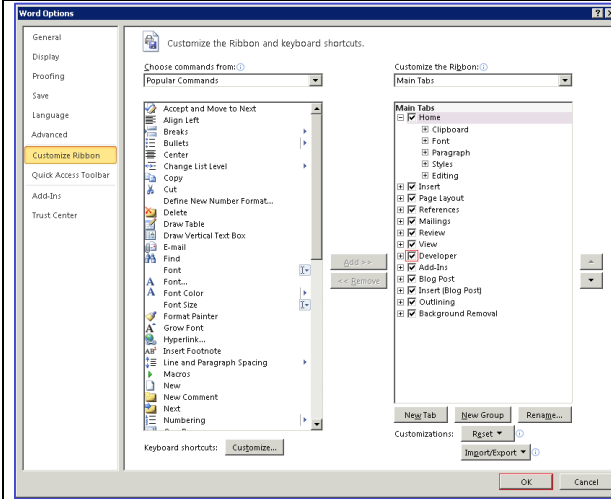
## Microsoft Office 2010



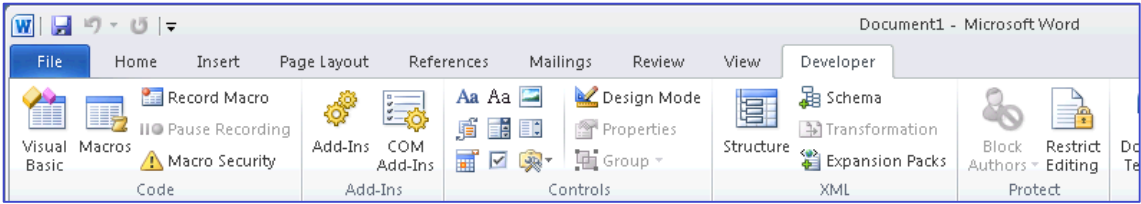
In the ribbon, open the “File” tab. In this menu bar, go to “Options”,



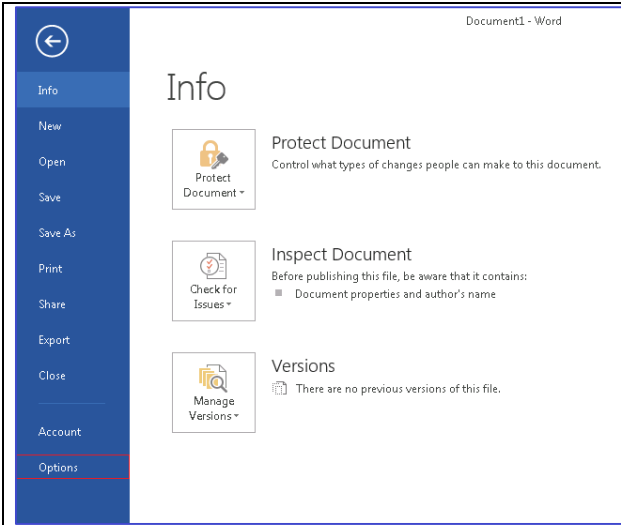
in the menu bar to "Customize ribbon",



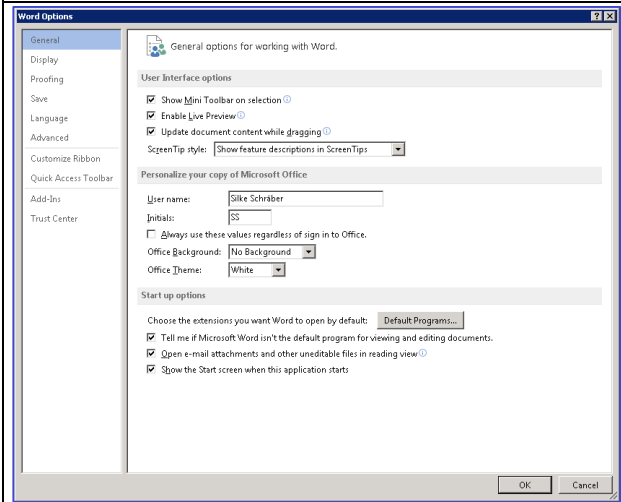
and tick the "Developer" box.



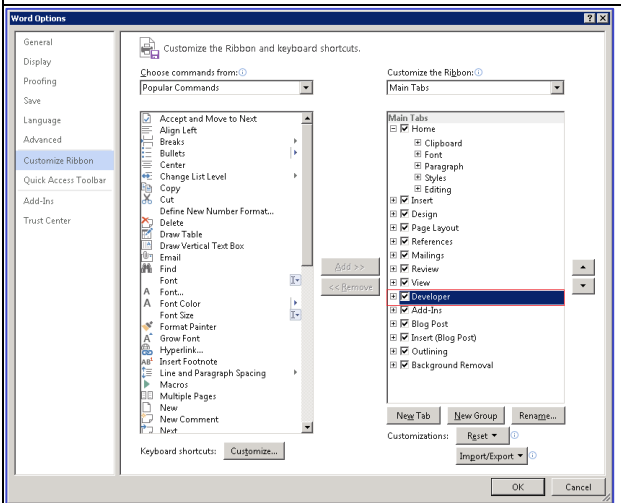
Microsoft Office 2013



Go via "FILE" to "Options"

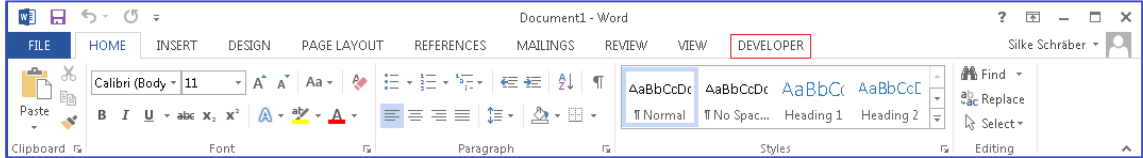


go to "Customize Ribbon",



tick "Developer" and

The "DEVELOPER" tab was added to the ribbon.





## 5.2. Preparation of the template

As the first step, a template has to be created according to the company's demands with Microsoft Word 207, 2010 or 2013. For the moment, the dynamic field assignment is disregarded here. Save the template as a .docx-file (**not** in the compatibility mode).

Schnittstellenverkäufer AG  
Addon-Strasse 100, D-01234 Microstadt

SalutationFirstnameLastnameJobtitleAccountStreetCityPostalCodeCountry

Quote no.	Quoteno	Editor:	Editor	Date:	Date
-----------	---------	---------	--------	-------	------

**Quote**

Dear  
|  
On the basis of your inquiry we would like to submit you the following quote:

Pos.	Amount	Description	Unit price net	Total price net
1	1	Component	Sales price net	Total net
Content				
<b>Final totals (net)</b>				<b>Total</b>

This quote is valid until and adds the legal effective value-added tax.  
The general terms of the Schnittstellen AG apply.

Kind regards  
Your Schnittstellen AG

*Included sample template for quotes*

(We work with Microsoft Office 2013).

### 5.3. Inserting content controls

Positions, which should later show dynamic text, are filled by so called content controls.

Our sample template for preparing a quote is used here to illustrate the process. (The sample template is included to the Word-Interface as an orientation and help for creating your own Word templates.)

The information that are eventually output in your Word document have to be retrieved from different entities.

Example:

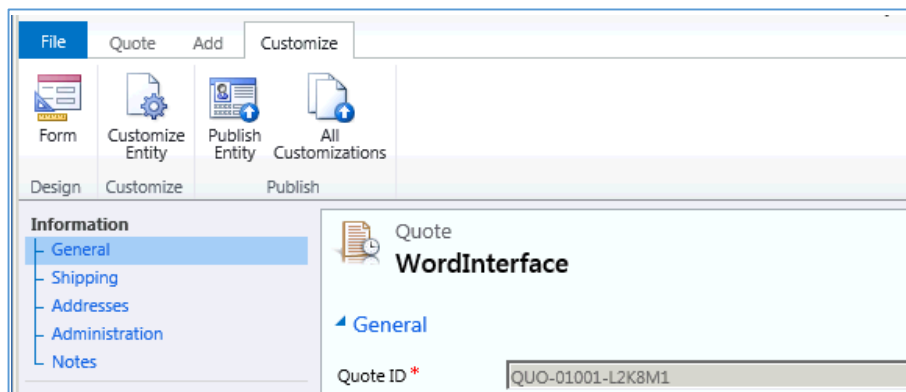
- customer's data: from the company's account record (account)
- data of the contact person: from the contact record (contact)
- quote number: from the quote record (quote) etc.

through the links (relationships) of the entities with each other one can access any of these fields.

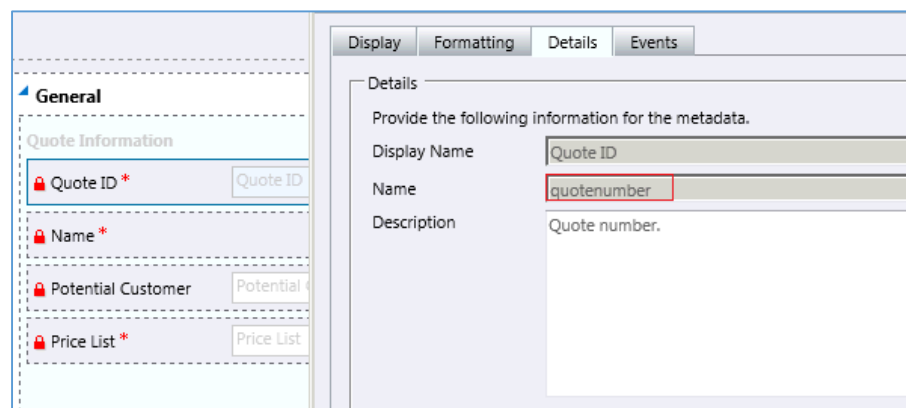
#### 5.3.1. Data from attributes of the starting entity

Generating a Word template for a quote requires the quote number. The quote number is an attribute of the quote and is displayed in the "QuoteID" field.

The form can be opened in the "Customize" tab in the ribbon.



A dialogue field about the desired attribute opens by double clicking on it. The "Details" tab shows the corresponding schema name.

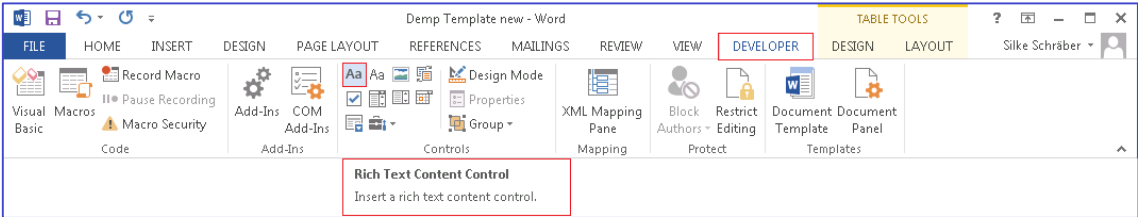


The schema name of the QuoteID (quotenumber) is „quotenumber“.

Insert a logic text at the place, where the quote number should be output in your Word document, and entirely mark this logic text.



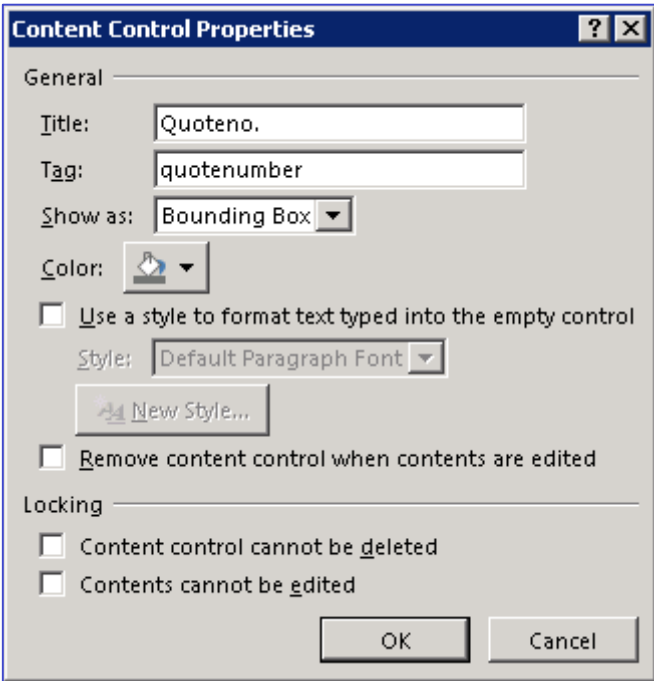
Go to the “DEVELOPER” tab and click on the “Rich Text Content Control” button. (Make sure that the logic text is still marked at this moment.)



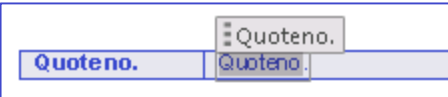
The marked text is now framed, showing that it is a Rich Text Content Control.



The “Settings” button in the ribbon opens a dialogue window, which is to be filled as follows:



Title: a logic and for the user comprehensible title (quote number)  
 Tag: schema name of the field (QuotID: quotenumber)



Now, the dynamic value for this field was stored.

### 5.3.2. Data from linked entities (simple concatenations)

If information are required from linked entities, the path must be set by the relation filed between the starting entity and the entity, from which the information are retrieved.

#### Example: company name

The concatenation between the quote and the company is made by the “Potential customer” field, where the company’s record is stored.

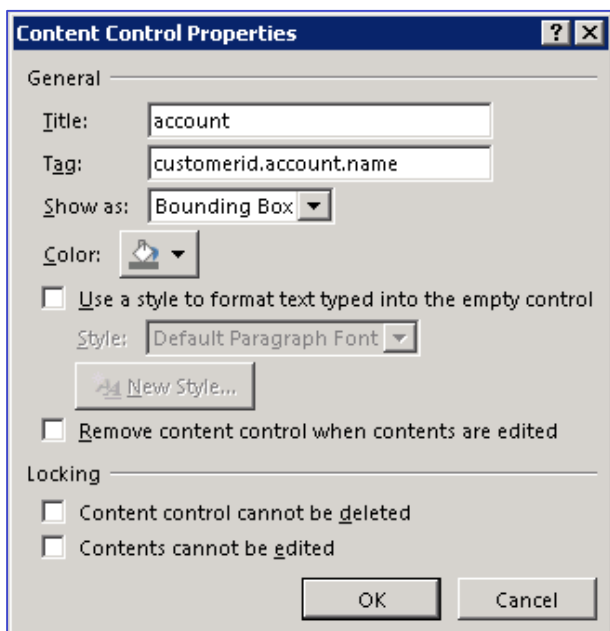
The schema name of this field is “customerid”.

The text stored in the Word document is marked as Rich Text Content Control (as described in point 5.3.1. Data from attributes of the starting entity) and its settings are defined.

The company name tag assembles as follows:

Path description	Tag	Content
1. via the field “Potential customer”	customerid.	schema name to quote
2. go to company	account.	entity name company
3. and output the field “company name”	name	schema name to company

The single parts of the tag are separated by a period. The complete tag is: **customerid.account.name**.



(Please consider the abbreviation of the tags according to the Metadata browser: **customerid.1.name**)

### 5.3.3. Data from linked entities (multiple concatenations)

All relevant entities are linked to each other. Therefore, you can use information from third entities for the path to the results field.

From the CRM quote form you can tell that there is no direct field concatenation between the “Quote” entity and the “Contact” entity. There is only a concatenation to the “Company” entity, where you can enter a “primary contact”. This very concatenation is used to generate the Word template.

**CRM-Path description:** The quote is the starting point. Go via the “Potential customer” field (customerid) to the company (account); here the field “primary contact” (primarycontactid) in the contact (contact) to the fields salutation (salutation), first name (firstname) last name (lastname)

Tag for salutation: (Metadata Browser:	<code>customerid.account.primarycontactid.contact.salutation</code> <code>customerid.1.primarycontactid.2.salutation)</code>
Tag for first name: (Metadata Browser:	<code>customerid.account.primarycontactid.contact.firstname</code> <code>customerid.1.primarycontactid.2.firstname)</code>
Tag for last name: (Metadata Browser:	<code>customerid.account.primarycontactid.contact.lastname</code> <code>customerid.1.primarycontactid.2.lastname).</code>

#### 5.3.4. Output the last name of the user.

Tag: `ownerid.systemuser.lastname`

#### Editor (current user)

The current editor of the interface can also be included into the template. This may be necessary for the editor who creates the document.

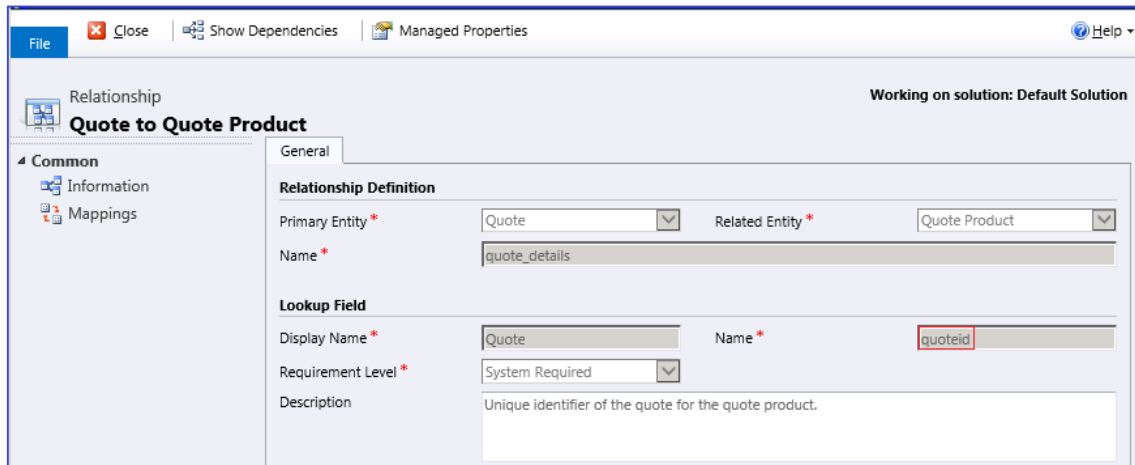
In order to include the current editing user into the template, please use the following tag.

Tag: `currentuser.lastname`

#### 5.3.5. Data from entities from a 1:n Relationship

In the Word template you also need to be able to access data from the entity “Quote (Product)” (also product position).

The quote and the quote item are related by a 1:n relationship. When creating the tag, one has to specify the entity in which he or she is working. In our example, we work in the “Quote” entity. From the quote you reach the “Quote (product)” entity (quotedetail) by the 1:n relationship.



The form of this entity contains fields, from which information are retrieved.

In our example we have 6 fields:

- the quote item (lineitemnumber)
- the quantity (quantity)
- the component (productdescription)
- the net sales price (priceperunit)
- the net total price (baseamount) and
- (possibly) a more detailed description of the components (description), which need to be defined one by one.

Pos.	Amount	Drescription	Unit price net	Total price net
1	1	Component	Sales price net	Total net
		Content		
<b>Final totals (net)</b>				<b>Total</b>

**Note:** A more detailed description of working with tables can be found in the following section [“Working with tables in the template”](#). Inserting content field into the table is independent from creating the table itself.

The tag for the product position defines as follows:

We work in the quote (quote) → with the 1:n relationship (quoteid) → entity “Quote (Product)” (quotedetail) →field for item number (lineitemnumber)

Tag: quote.quoteid.quotedetail.lineitemnumber

Since we work in the quote, we can leave out the word “quote”.

Tag: quoteid.quotedetail.lineitemnumber

*Note:* In CRM 2011, the “Position or serial number” field (lineitemnumber) must possibly be inserted by customizing the main form of the “Quote (Product) entity.

The tags for the five fields from this entity are:

Tag quantity:	quoteid.quotedetail.quantity
Tag component:	quoteid.quotedetail.productdescription
Tag net sales price:	quoteid.quotedetail.priceperunit,round*1
Tag net total price:	quoteid.quotedetail.baseamount,round*1
Tag description:	quote.quoteid.quotedetail.description

\*1 „round“: additional tag separated by a comma, used to round up to two decimal places in number fields.

Note to the additional tag „[round](#)“: A list of all available additional tags and a description of how to work with them.

#### 5.4. Working with tables in the template

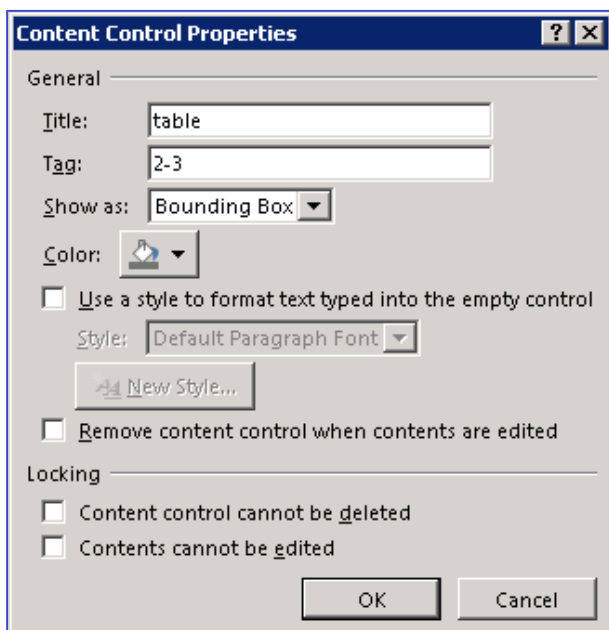
Tables serve well to clearly present data in rows and columns. The first row, which is being output only once, is the header. Any other specific information are given out in the following rows according to the description in the header and contain dynamic values.

The table result is displayed in the last row (footer).

The output is supposed to consist of several product items (quote item, order item or billing items), whereby header and footer remain unchanged.

We strongly recommend to first setting the tags in the single rows and columns before defining the table in the Word template as such.

**After** defining all required field contents of the table by tags, mark the **entire table** and define it as Rich Text content control element.



**Title:** The title of a table always has to be “**table**”.  
**Tag:** Definition of which rows contain dynamic values

Example:

Header (row 1) and footer (row 4) remain unchanged.  
Row 2 and row 3 contain dynamic values.

Pos.	Amount	Drescription	Unit price net	Total price net
1	1	Component	Sales price net	Total net
		Content		
Final totals (net)				Total

Note: Do not set the table tag, until all fields of the table were defined with the corresponding tags. Should any changes and/or additions be necessary, errors may occur. In such cases, it is advisable to regenerate the entire table.

#### 5.4.1. Sorting the table items

If you want to sort your product items in the table by specific criteria (e.g. item numbers), you can set this sorting in the table options.

Thereto, enter the rows which include dynamic values in the table tags and separate it by a comma. Now, add the sorting criterion (e.g. quotedetail) and the sort field (e.g. lineitemnumber), by which the table is sorted.

The field by which is sorted, can be from any concatenated entity.

Example:

Sorting by item number:

Title: table

Tag: 2-3,quotedetail.lineitemnumber

The standard sorting is in ascending (numbers) or alphabetical (letters) order.

If you wish to sort in descending order, add the tag "-desc".

Example:

Sorting by item number, descending:

Title: table

Tag: for our example in the quote: 2-3,quotedetail.lineitemnumber-desc.

#### 5.4.2. Tag: tablerow (conditional table rows)

If there are blank fields in the entities left, unwanted spaces and empty lines may occur in the Word document, which requires touching-up later.

In order to prevent such spaces and empty lines, single table rows can be provided with conditions. With these conditions it is – depending on the data content – possible to show resp. hide rows and to define alternative formats for single table rows.



In this example, we work with a table element. Often, the component saved as description is enough to clearly describe the quote item. Therefore, the description of the content can be omitted. As a result, the Word-Interface gives out an empty line, which may have to be removed manually.

Pos.	Amount	Drescription	Unit price net	Total price net
1	1,00	WordInterface	€960,00	€960,00
→				
2	1,00	Software Assurance for WordInterface	€317,00	€317,00
→				
<b>Final totals (net)</b>				<b>Total</b>

This can be prevented by using the tag “tablerow”.

The table is generated and filled with the tag for the individual columns and rows (quantity, components, purchase prices, etc.), just as described in [“Working with tables in the template”](#).

Subsequently, mark and define **every row** which contains dynamic content. In our example, this applies for the table rows 2 and 3.

Row 2 of the table should, regardless of blank fields, always be displayed. Mark this row and include a Rich Text content control element. The row is defined as follows:

Title: tablerow  
Tag: true.

Row 3 is marked, assigned as Rich Text content control and defined as follows:

Title: tablerow  
Tag: quoteid.quotedetail.description notnull

Row 3 is only displayed in the Word document when the “content” field is not null, hence information has been entered.

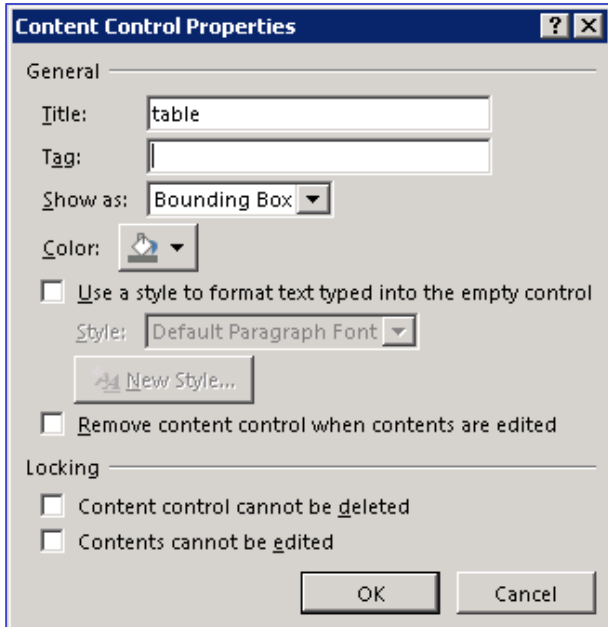
When generating the Rich Text control elements, one may encounter fields which are already defined. In these cases, simply mark the row again. The Rich Text content control element can be identified by the prominent mark. Activate this mark with a mouse click and enter the corresponding tag.

Pos.	Amount	Drescription
Position		
1	1	Component
		Content
<b>Final totals (net)</b>		

After marking every row, the **last** thing to do is the definition of the table tag.

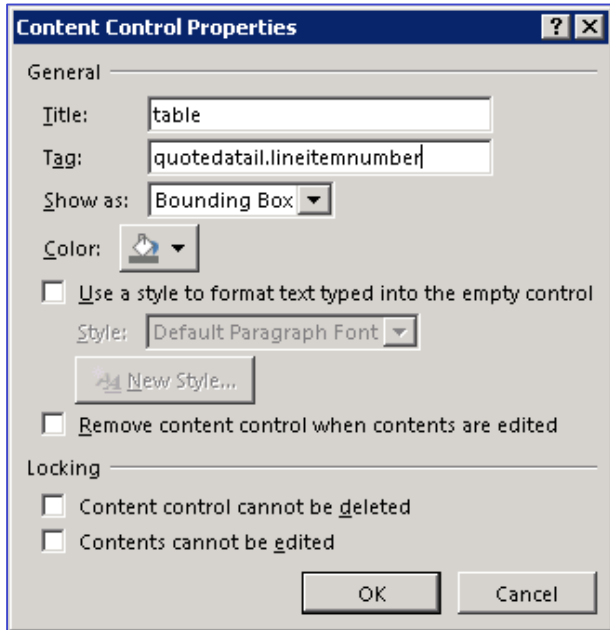
Since the single rows are already tagged with the tablerow tag, the definition of the number of lines can be omitted when generating the tag.

Mark the entire table and define it as Rich Text content control element. Its title is table. The description of the tag remains blank.



Pos.	Amount	Description	Unit price net	Total prise net
1	1	Component	Sales prise net	Total net
Content				
<b>Final totals (net)</b>				<b>Total</b>

If you wish to sort your table, proceed as described under "[Sorting the table items](#)". The definition the table tags will be like this.



Please consider the order of defining the tag: first define the tags in the table fields, then the tablerow tags for the corresponding rows and at last define the table tag. If you want to carry out changes or additions to existing table, error messages may occur. In such cases, it may be necessary to recreate the entire table and again save it in the Word templates.

The tablerow tag always consists of three parts, separated from each other by spaces:  
 - the field to be checked in row (quotedetail.quantity)  
 - the operator (e.g. !=) and  
 - the desired value.

- the desired value.

The operators for the definition of the rows are:

” >	greater than
” <	less than
” =	equal
” !=	unequal
notnull	contains a value
isnull	contains no value

With the linked condition “quotedetail.quantity !=1” f.i. a row can be defined, which will only be displayed if the saved value for the quantity in the quote item is unequal 1.

### 5.5. Date and time as well as data which cannot be output out from entities

The CRM Word-Interface offers the possibility to output out a new date and a new GUID of the document.

The situation may require inserting current data into the template. The classic example for this is the current date.

There to, enter “newdate” in the field properties of the “tag” field.  
(The current date and time (Hour:Minute:Seconds) are output.)

Date:	30.08.2013 17:00:16
-------	---------------------

You can also assign defined additional tags, to optimize the display of the date according to your requirements.

These additional tags are separated from the actual tag by a **comma**.

The following tags are assigned in order to output the current date in different formats:

newdate,date\_iso: formats date outputs as follows: yyyy-mm-dd

Output:

Date:	2011-08-30
-------	------------

newdate,date\_de: formats date outputs as follows: dd.mm.yyyy

Output:

Date:	30.08.2013
-------	------------

newdate,date\_us: formats date outputs as follows: mm/dd/yyyy

Output:

Date:	08/30/2013
-------	------------

newdate,date\_uk: formats date outputs as follows: yyyy-dd-mm

Output:

Date:	2013-30-08
-------	------------

IF only the current time should be output, use the tag: newdate,time

Output:

Time:	17:02
-------	-------

If a document should be issued with a GUID, use the tag “newguid”.

**The output in the Word** document. These empty lines and space may require later manual editing.

In order to prevent such cases, we highly recommend to define these field with the additional tags “,blank” and “,newline”.

In the Word document, the address field of our sample quote looks as follows:

<p>Schnittstellenverkäufer AG  <a href="#">Addon-Straße 100, D-01234 Microstadt</a></p> <p>SalutationFirstnameLastnameJobtitleAccountStreetCityPostalCodeCountry</p>
--

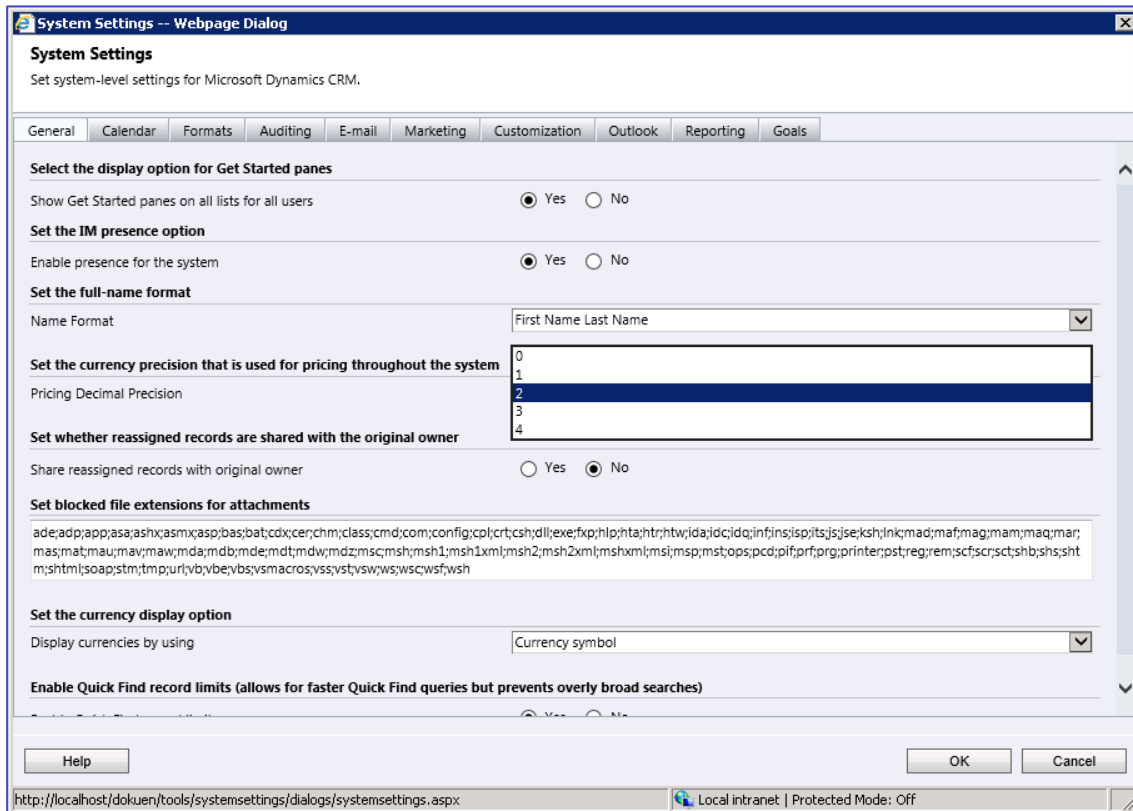
The corresponding tags are in detail defined as follows:

Salutation primary contact:	customerid.1.primarycontactid.2.salutation,blank
First name primary contact:	customerid.1.primarycontactid.2.firstname,blank
Last name primary contact:	customerid.1.primarycontactid.2.lastname,newline
Jobtitle:	customerid.1.primarycontactid.2.jobtitle,newline
Company name:	customerid.1.name,newline
Street (company):	customerid.1.address1_line1, newline

City (company):	customerid.1.address1_city,blank
Postal code (company):	customerid.1.address1_postalcode,newline
Country:	customerid.1.address1_country

### 5.6.2. The additional tag: ,round

The CRM system can calculate with up to four decimal places after the point. The setting of the decimal places can be adjusted in the site map under “Settings”, in the “administration” entity under “System Settings”.



Usually, it should be possible to round the amounts in the currency fields in the Word document. Thereto, add the additional tag “round” after the comma to the corresponding tag. Here, we generally distinguish between currency fields and number fields.

If you wish to round currency fields, add the additional tag “round”. The amount will automatically be rounded to two decimal places after the point.

f.i.: quote.quoteid.quotedetail.priceperunit,round.

Output with additional tag “round”

**Output without additional tag:**

<b>Unit price net</b>
1.000,1234 \$

**Output with additional tag “round”**

<b>Unit price net</b>
1.000,12 \$

If the amount should be rounded to only one or even three decimal places after the point, just add the according number of decimal places in digits.

f.i.: quote.quoteid.quotedetail.priceperunit,round3.

**Output with additional tag “round3”**

<b>Unit price net</b>
<b>1.000,123 \$</b>

If input in number fields (e.g. the “quantity” value should be output with max. two decimal places after the point) should be rounded, the process will be the same as for rounding in currency fields.

But unlike currency fields, the rounding to two decimal places after the point does not happen automatically, but by adding the additional tag “round2”.

Example tag: quote.quoteid.quotedetail.quantity,round2

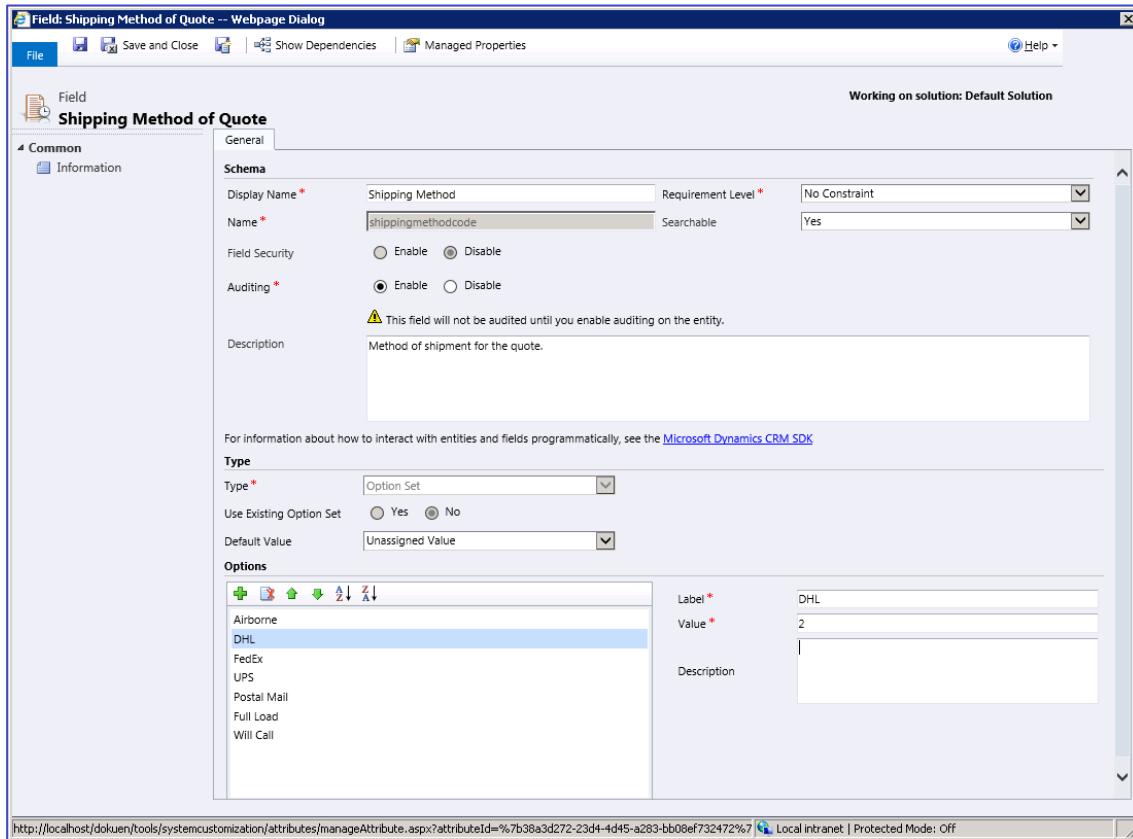
Output:

<b>Amount</b>
<b>1,00</b>

### 5.6.3. The additional tag “noformat”

The additional tag noformat can retrieve definition information from “option set” type fields.

The provided standard CRM defined the Shipping Method as option set. When generating this field, a value is saved for any choice, which can be retrieved by this tag.



Output of the shipping method in the Word document as follows:

Tag: shippingmethodcode

Output in the Word document with our example: DHL

Output of the value of the shipping method in the Word document as follows:

Tag: shippingmethodcode,noformat

Output in the Word document with our example: 2.

*Die Ausgabe des Wertes der Versandmethode im Word-Dokument erfolgt*

*Tag: shippingmethodcode,noformat erfolgen.*

This tag is especially important when using together with other tag, e.g. the tag for conditional table rows (tablerow tag), if, for instance, a row should only be displayed in the Word document, if a certain entry has been selected in the field which was defined as option set.

In order to enable links between the content of the field and the output in the Word document, a comparison has to be carried out. This will happen when creating the value saved for the option set.

<b>Shipping Method:</b>	<b>Shipping Method</b>
Shipping of the goods takes place to your front door.	



The goods are delivered to an authorized person of your company in our storehouse at Sample street 123.

Rows 2 and 3 should be displayed in the Word document according the selected shipping method.  
The tag for the shipping method in row 2 is shippingmethodcode.

Row 2 is marked and defined as tablerow.

Title: tablerow  
Tag: shippingmethodcode = 2,noformat.

Row 3 is marked and defined as tablerow

Titel: tablerow  
Tag: shippingmethodcode = 7,noformat

After that, assign the entire table with the table tag.

The "DHL" shipping method is defined with the value "2" in the option set. When this method is selected, row 2 will be displayed in the Word document. If the shipping method "Self-collector" was selected", there will be a selection of row 3.

### 5.7. Tag: condition (conditions)

The "condition" tag was developed to prevent the user from changing the same things in the Word document again and again. With this tag, the output in the Word document is attached to specific conditions.

Our example: salutation in a letter.

There are three possibilities for a salutation in the Word document, which are saved in the template as follows:

Usually, the quote is submitted to the person, who initiated the creation of the quote. Mostly, this will also be the person, who is set as primary contact in the company record. Therefore, the data of the general salutation can, just as in the address field, be retrieved into the Word document from the primary contact. If, however, no primary contact is set or unknown, the output of the Word-Interface for this passage will look like this:

Dear

On the basis of your inquiry we would like to submit you the following quote:

To prevent this, we save the salutation in the letter as follows:

Dear Sir or ~~Madam~~ Dear salutationfirstnamelastname,

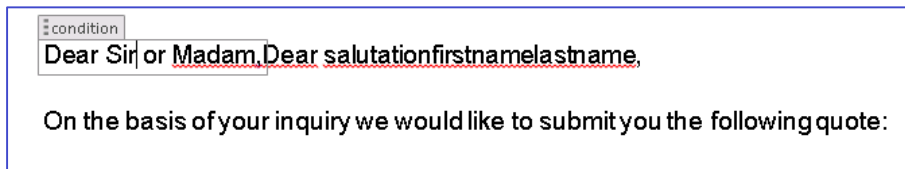
On the basis of your inquiry we would like to submit you the following quote:

*(In order to prevent unnecessary spaces in the Word document, empty lines between the forms of salutation must not be inserted.)*

Afterwards, the tag for salutation, title and last name is saved for the different versions. Subsequently, the entire first form of salutation (Dear Sir of Madam,) is marked as Rich Text content control element. It is defined as follows:

**Title:** condition  
**Tag:** customerid.account.primarycontactid isnull

The tag refers to the primary contact field of the company record. If this field is blank (isnull), this form of salutation is output in the Word document. Please note, that the comma behind the tag is part of the Rich Text content control element. Otherwise, this passage must manually be edited later.



The second form of salutation (Dear salutationfirstname.lastname,) is marked and defined as Rich Text content control element as well.

**Title:** condition  
**Tag:** customerid.1.primarycontactid.2.salutation notnull.

The form of salutation saved in the contact is the reference of the condition, which is linked to this output

Forms of salutation can also be defined as a certain entry in a field.

Example:

**Title:** condition  
**Tag:** customerid.1.primarycontactid.2.salutation = Mrs.

When setting the tags please note, that the condition always has to be linked to a field (not to an entity).

Therefore, saving the tag "customerid.account.primarycontactid.contact notnull" would be wrong and cause an error message.

Furthermore, please consider, just as for the tablerow tag (point [5.4.2.](#)), the correct order: firstly, define these fields, which are later enclosed by the condition tag (setting tags from the inside to the outside).

When placing the order, many customers add their individual order number. This order number must always be included in the further process of the order, since the customer as well needs to assign this number within his/her system.

With the condition tag, it is possible to add a corresponding field in the Word template. This field will only be put out in the Word document, if it is filled correctly in the CRM system.

## 5.8. The function: ALIAS

Even when using the CRM 2011 Metadata browser, it may happen, that the 64-character-limitation of Microsoft Office Word is reached or exceeded.

To avoid this limitation, use the ALIAS function.

(This function can be used with any tags. For reasons of simplicity, we will illustrate our example with a "simple" tag.)

Here, we use the tag for the component/product description in the quote.

**Tag:** quote.quoteid.quotedetail.productdescription

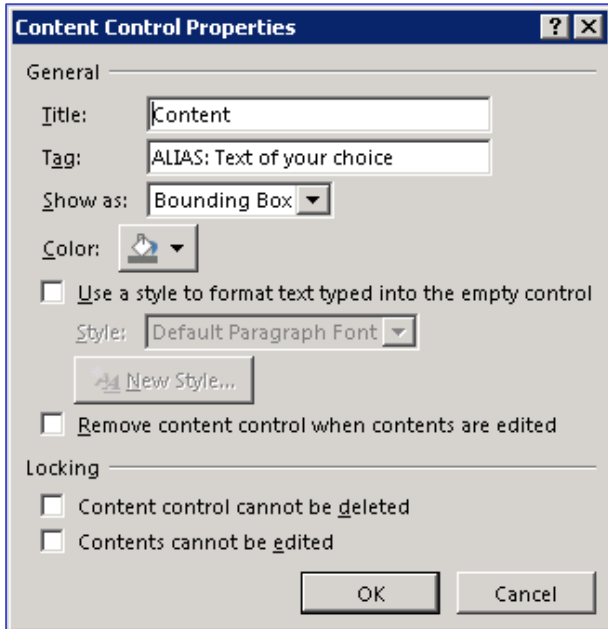
The text passage saved to the Word document is marked as Rich text content control element and is clearly titled.

Example:

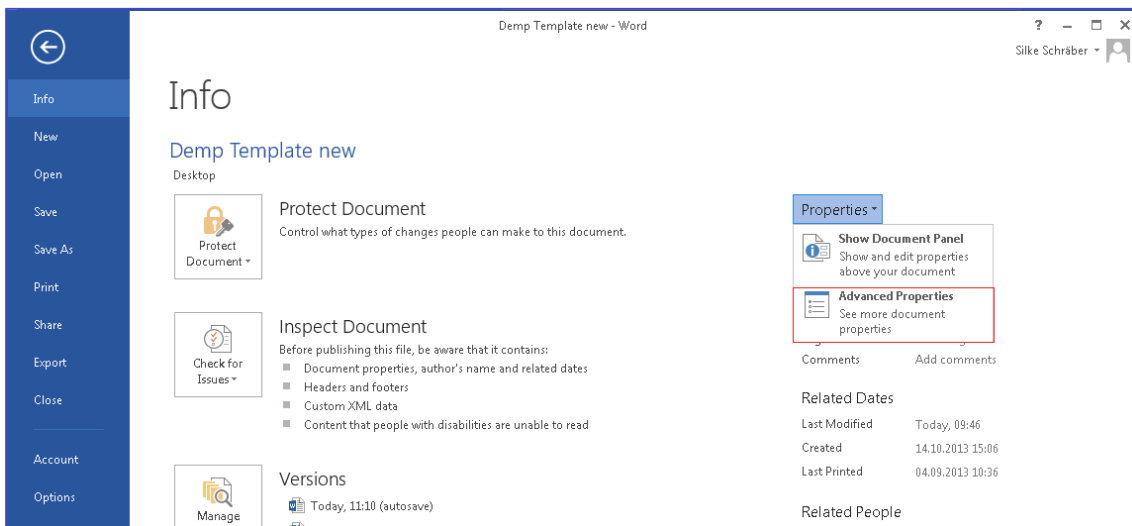
**Title:** Content  
**Tag:** ALIAS:Text of your choice

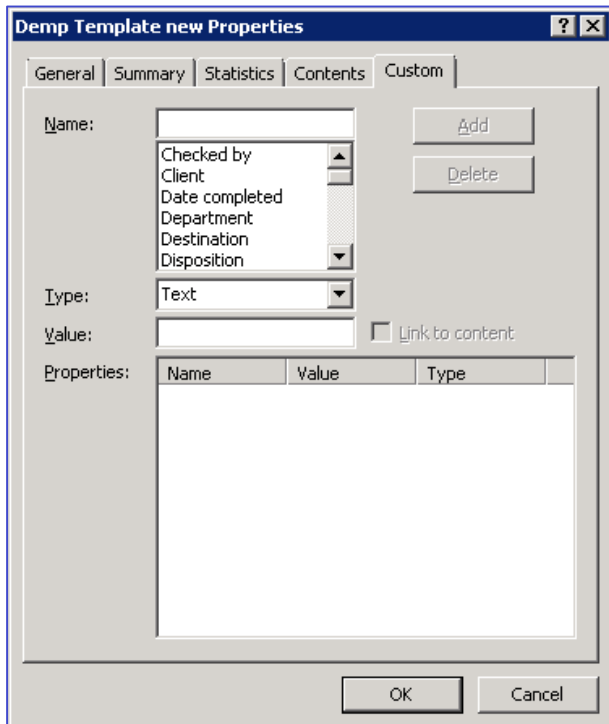
**(Attention!**

**The word ALIAS always has to be written in capitals. The colon is added without spaces, the ALIAS text follows without spaces.)**



The "File" tab → menu item "info" in the site map → Properties → opens the "Advanced Properties" of the Word document and there the "Custom" tab.



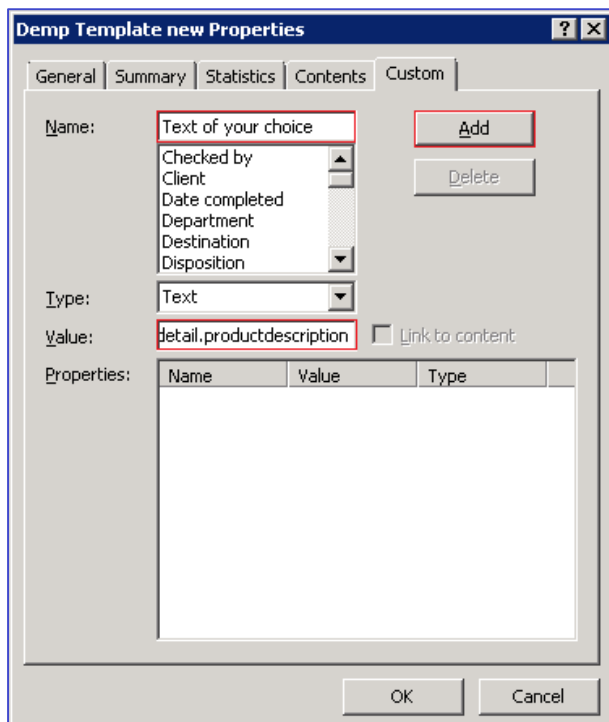


Here, define, you can define your tag:

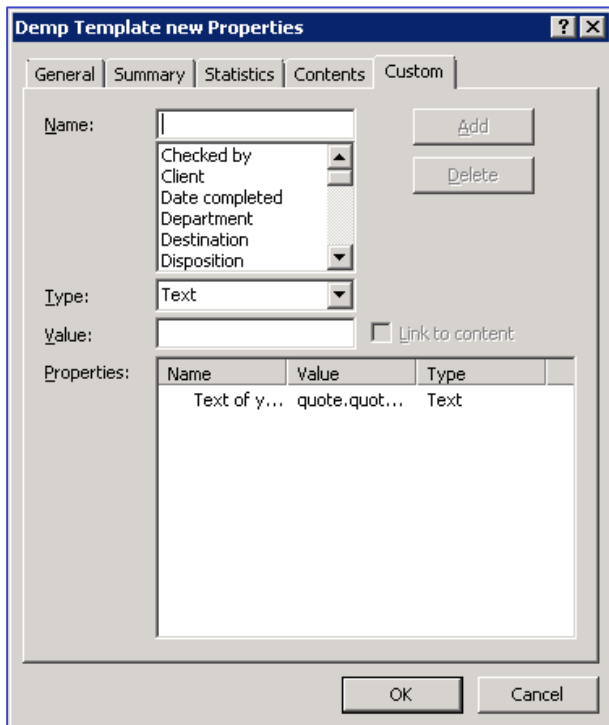
Name: Text of your choice (of the assigned ALIAS(-Names))

Value: (Tag for the description)

The "Add" button completes this step.



Now, the ALIAS function is saved.



With the ALIAS function, you can extend your tag up to 255 characters.

### 5.9. Partylist fields

MS Dynamics has, in addition to its standard fields, so-called partylists. These fields appear at different places and have different purpose. Examples of this area are the resource fields in the activities or senders and recipients of an email. Partylists can be recognized by the possibility to save several records in this field. One can, for example, save not only several system users, but also devices. In order to use such a partylist, a different syntax is required. This syntax is similar to the table syntax.

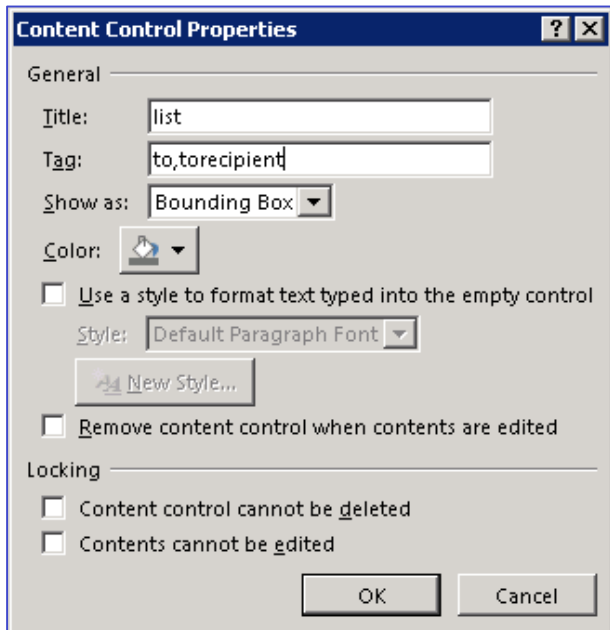
**Title:** list  
**Tag:** customers,customer

The title "list" defines the list as a partylist. "customers" is the schema name of the service activity field, which we want to output. The "customer" separated by a comma is the partylist type. The field name indicated the partylist type. There are different types.

You can use these types:

Name of the partylist	Schema name	Description	Partylist no.
sender	from	sender, e.g. email	1
torecipient	to	recipient party list for the email, also refers to recipient records, e.g. user and queues	2
ccrecipient	cc	copy-recipients (Cc:)	3
bccrecipient	Bcc	blind-copy-recipients (Bcc) in emails	4
requiredattende	requiredattende	required attendee (appointments)	5
optionalattende	optionalattende	optional attendee for appointments/recurring appointments	6
organizer	Organizer	organizer of appointments, planner of recurring appointments	7
regarding	regardingobjectid	regarding to	8
owner		owner	9
resource	Resources	resource in the service activities	10
customer	Customers	customer in the service activities	11
partner	partners	partner	12

If, for instance, all recipients of an email should be displayed in one Word document, use the following definition:



The output of all recipients will display the first and last name of the single recipients, separated by a semicolon:

Frieda Friedrich; Jane Smith

It is, however, of no significance whether the recipient of the email is a company, a contact or a user.



Emails in the field of marketing are often bound to campaigns, which have many recipients. In order to put them out with the Word-Interface, it is more efficient to use a table.

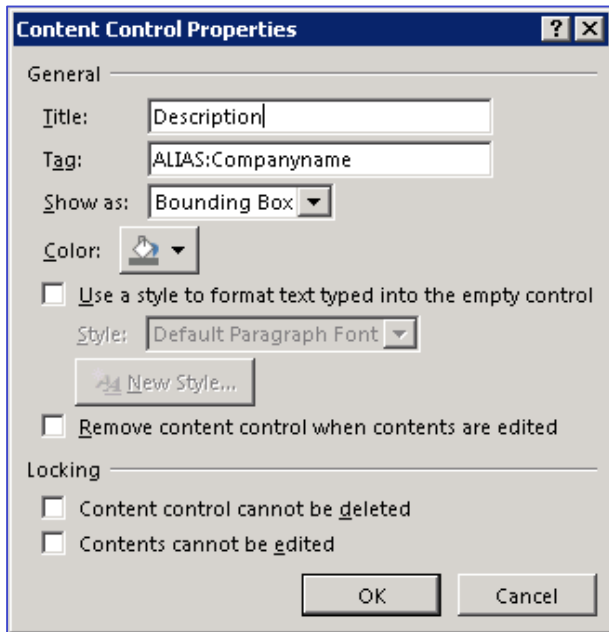
The output of the Word-Interface may look like this:

Recipients of the email of 30 April 2013
Interface purchaser ABC
Jane Smith
Silke Schraber

### 5.9.1. Output of further information from partylist elements

When outputting further information from partylist field, the use of the ALIAS function the body `[participationtypemask='x']` is obligatory, since the tags exceed the 64-character-limitation.

Just as with the ALIAS function, mark the corresponding fields as Rich Text content control elements and describe them as follows:



Now, open the advanced document properties via the “Customize” tab and insert the information as follows:

Name: enter the name, which was given in the Tag with the ALIAS function

Example:

Name: company name

Value: email.activityid.activityparty[participationtypemask='2'].partyid.contact.parentcustomerid.1.name

The value (tag) composes as follows:

email: the activity is an email:  
 activityid: the relationship **activityid** directs the email to  
 activityparty: activity parties

Every partylist field has an unambiguous identity number. This is given in the previous table. We relate to this number in the square brackets.

[participationtypemask='2']:	recipient of an email
partyid:	relationship between email recipient and contact
contact:	contact record of the email
parentcustomerid:	via the field of the superordinate customer
account:	to the corresponding company record
name:	to the company name

In our example, we want to retrieve not only the last name and first name, but also the corresponding company name and the place of the concerning company.

Tag for company name:

email.activityid.activityparty[participationtypemask='2'].partyid.contact.parentcustomerid.account.name  
 (Metadata Browser:  
 activityid.135[participationtypemask='2'].partyid.2.parentcustomerid.1. address1\_city)

Tag for company place:

email.activityid.activityparty[participationtypemask='2'].partyid.contact.parentcustomerid.1. address1\_city)



Metadata Browser:

activityid.135[participationtypemask='2'].partyid.2.parentcustomerid.1. address1\_city)

The output in the Word document looks as follows:

<b>Recipients of the email of 30 April 2013</b>			
Glynn (sample)	Jim	Coho Winery (sample)	Phoenix
Campbell (sample)	Maria	Campbell (sample)	Lynnwood
Anderson(sample)	Nancy	Adventure Works (sample)	Adventure Works
Higa (sample)	Sidney		
Stubberod (sample)	Susanna	Dallas	Issaquah

The contact Higa, Sidney is not linked to a company, therefore not data is output.

The order of the list is arbitrary without sorting. If sorting is desired, use the Word sorting tools according to your requirements.

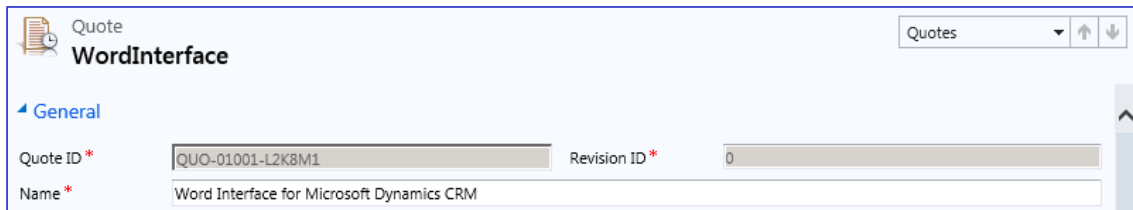
### 5.10. The tag “Format”

The “Format” tag gives the user the opportunity to display additional information, which is not included in the CRM, in the Word document.

In addition to the information retrieved from the CRM-fields, placeholders have to be set.

Example:

The quote should output not only the quoteID, but also an additional information, which is not included in the CRM.



Information output:

Licenses for Word-Interface for Microsoft Dynamics CRM cannot be returned.

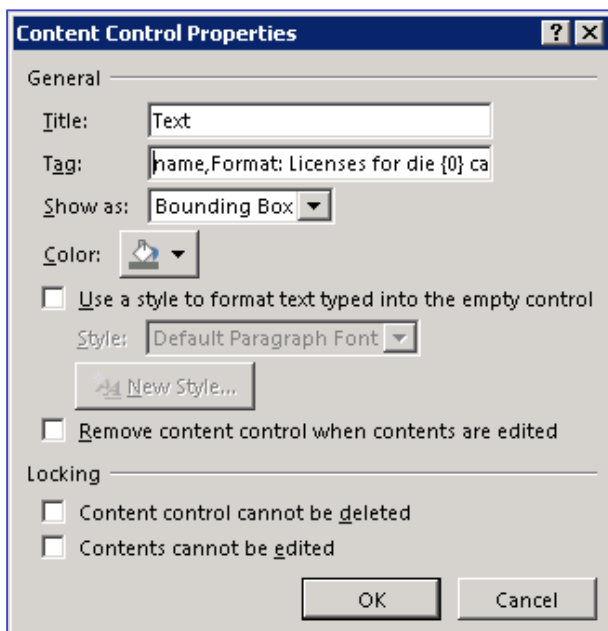
The place, where the text is inserted, is marked with a Rich Text content control element und is defined as follows. Please note that placeholders for the quoteID have to be written in curly brackets and content 0 {0}. The additional information must also **not** contain a comma.

Title:

Text

Tag:

name,Format: Licenses for die {0} can not be returned.



The output in the Word document is as follows:

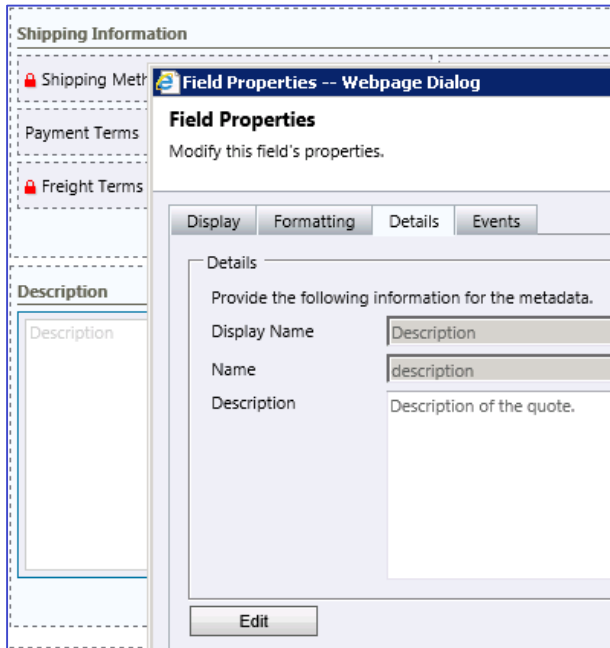
Licenses for Word-Interface for Microsoft Dynamics CRM 2011 cannot be returned.

### 5.11. Including images with the Word-Interface (tag: image)

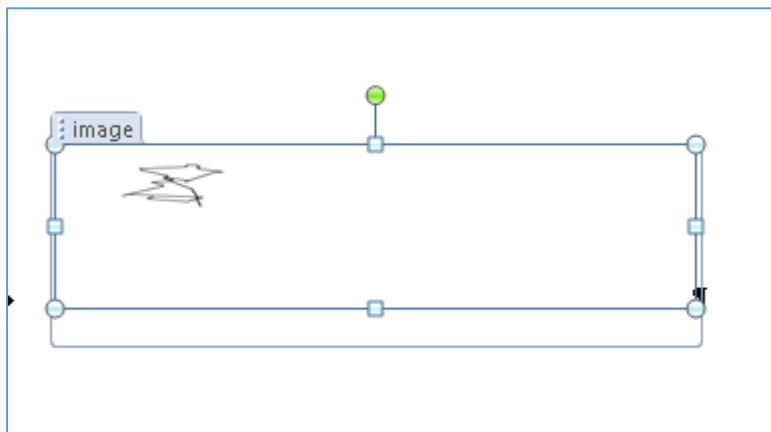
Even images can be included in the Word template with the Word-Interface.

Place an image template in the Word template where the image should be output, mark the entire image and define it as Rich Text content control element. The title of the images is image.

The tag is the field, where the path of the included image is entered. In our example, we use the “description” field in the “quote” entity.



Title: image  
Tag: description.



*View in the Word template*

The images to be included have to be stored in a directory which can be accessed by the CRM server. It is also possible to enter the URL of an image from the internet. This URL also needs to be accessible by the CRM server.

The starting point of the path has to be the CRM server.

In our example, the path should be entered in the “description” field in the “quote” entity.

We want to include the logo of the Donaubauer AG.

Description
<code>http://wordinterfacepictures/Logo_DonAG.jpg</code>

The output in the Word-Interface looks as follows:



The image format entered in the Word template should correspond to the format of the image to be included. Otherwise, the image to be included will be adjusted to the template of the Word file. This may result in unwanted image distortions.



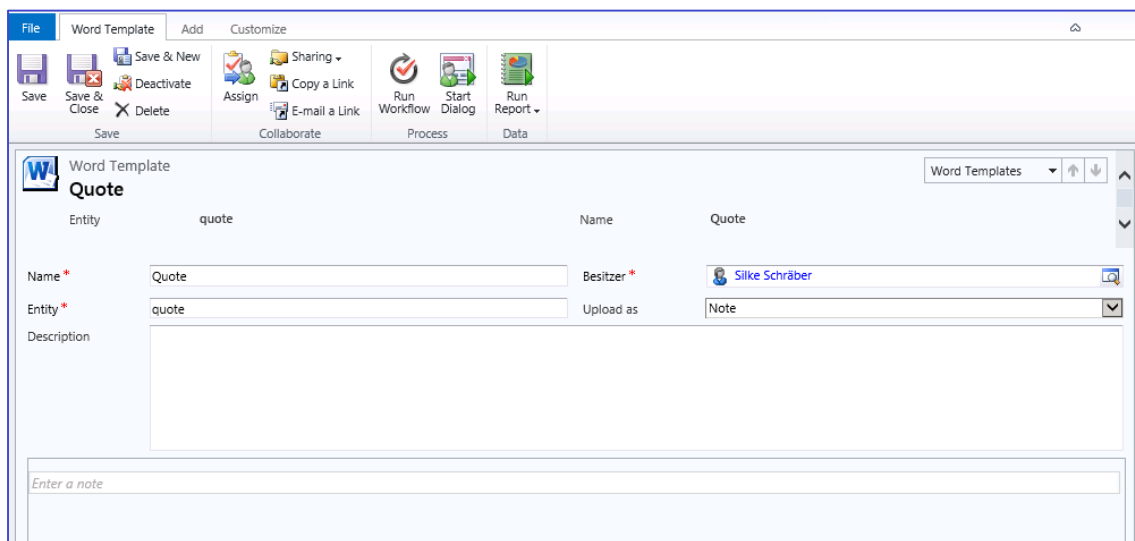
## 6. Working with the created templates

### 6.1. Attaching the Word template

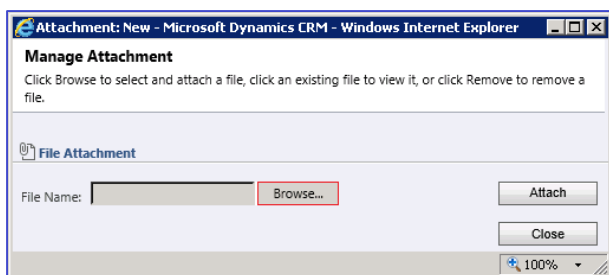
#### 6.1.1. Attaching the Word template as new note

As the creation of the Word template is finished, it now has to be added to the system.

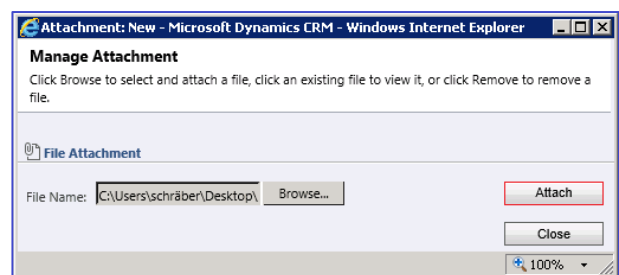
There to, go to “settings” in the application area, and here to the “Word template” entity. All your created, active Word templates are listed here. Please select the Word template to which you want to attach to created template (in our example this is the quote template) and open it by a double-click.



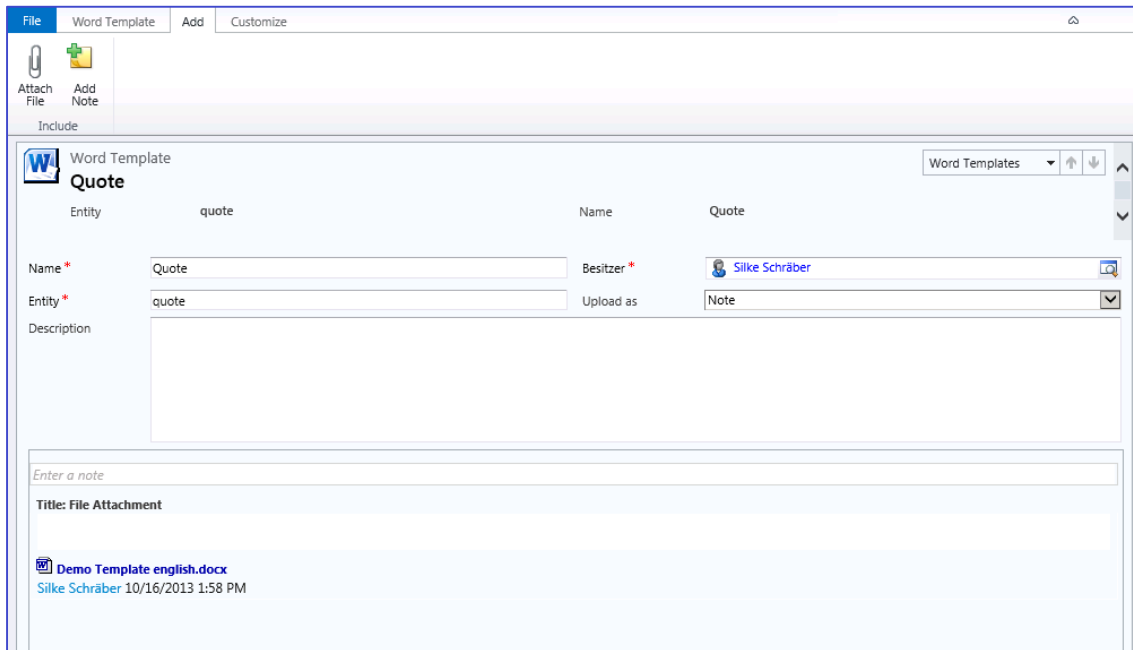
By clicking “Attach File” in the “Add” tab the following window opens up:



Use the “Browe” button to select the created Word template.



The “Attach” button attaches the record as a note. Use the “Close” button to finish the process.



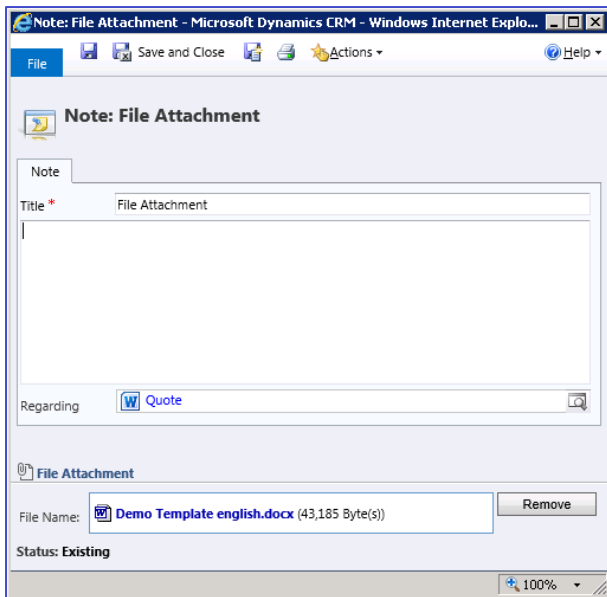
Your created template was saved as a note to the Word template and can now be used.

## 6.1.2. Exchanging the Word template

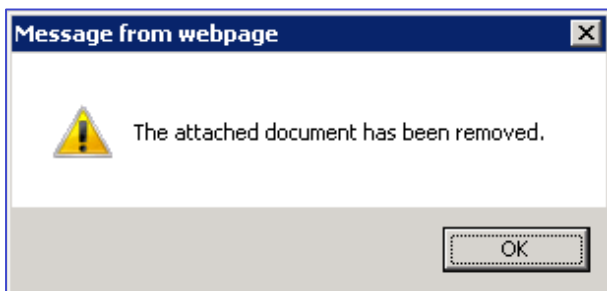
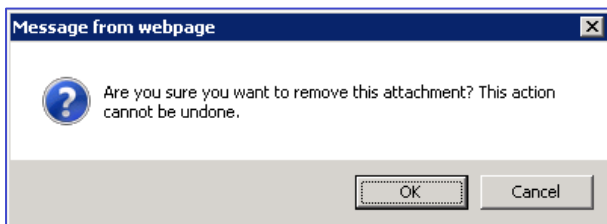
When working with Word templates, they are always subject to modifications or updates. The modified Word template has to be attached to the corresponding Word template as described in the paragraph "[Attaching the Word template as new note](#)". The system automatically uses the latest Word template as current version. The old template still remains in the system.

Especially when initially creating a Word template, the single tags or parts of the new template need to be tested repeatedly. This may result in a long and confusing queue of notes attached to the Word template. In such cases it is better to simply exchange the note of the Word template.

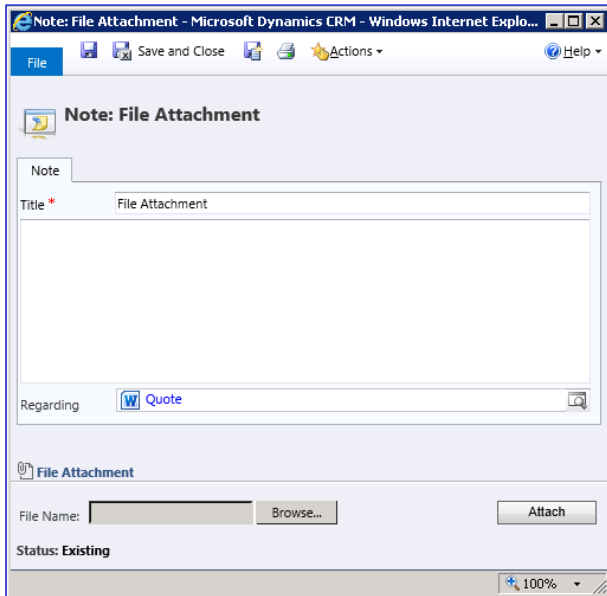
The following window opens by double clicking on the attached note:



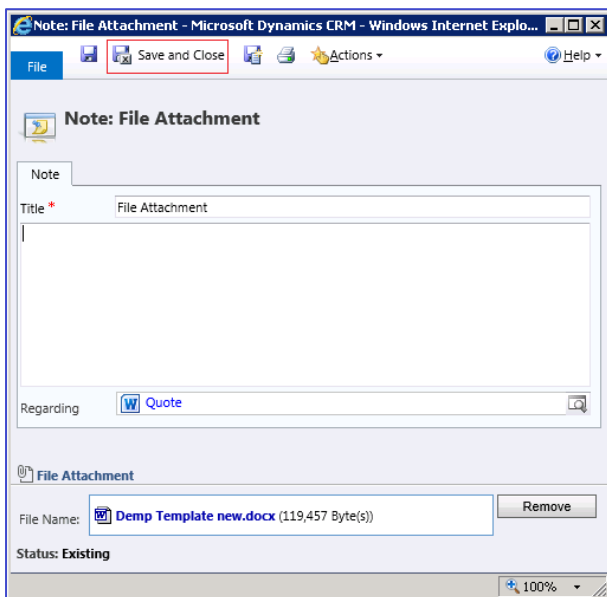
By clicking the "Remove" button and confirming the following message with the "OK" button,



the attached document is removed.



Use the “Browse” button to select the new template and attach it as note to the Word template by clicking the “Attach” button. Conclude this process by confirming the “Save and Close” button.



The current date and time of the attaching process is the only procedure which is documented.

**Attention!**

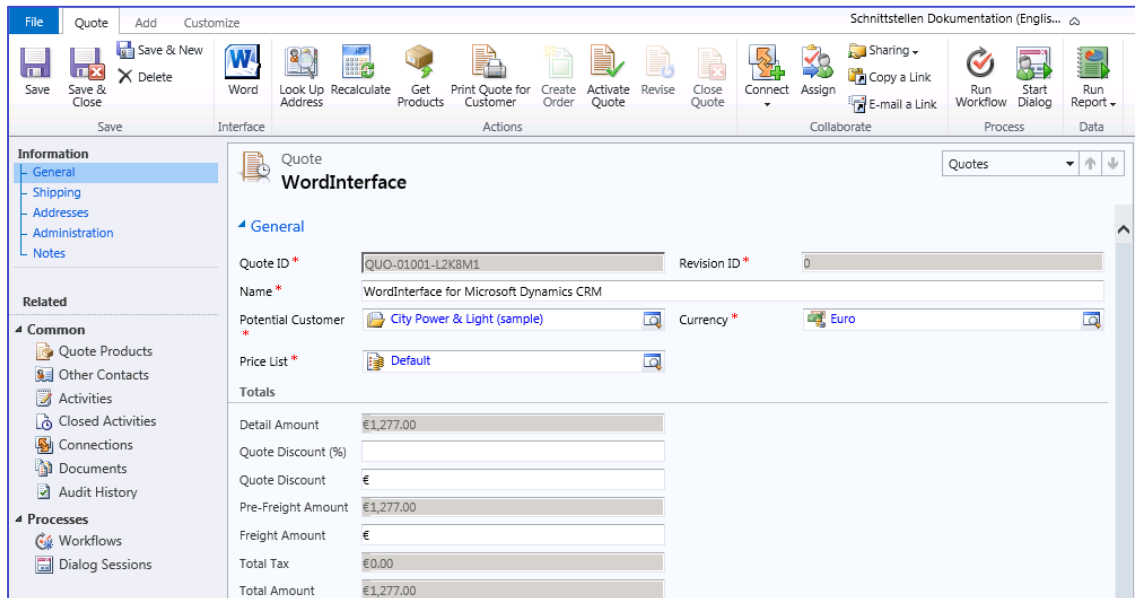
**The disadvantage of exchanging Word files is that older templates are not available in the system anymore. Therefore, please store them internally in order to access them in an emergency case.**



## 6.2. Productive work with the template

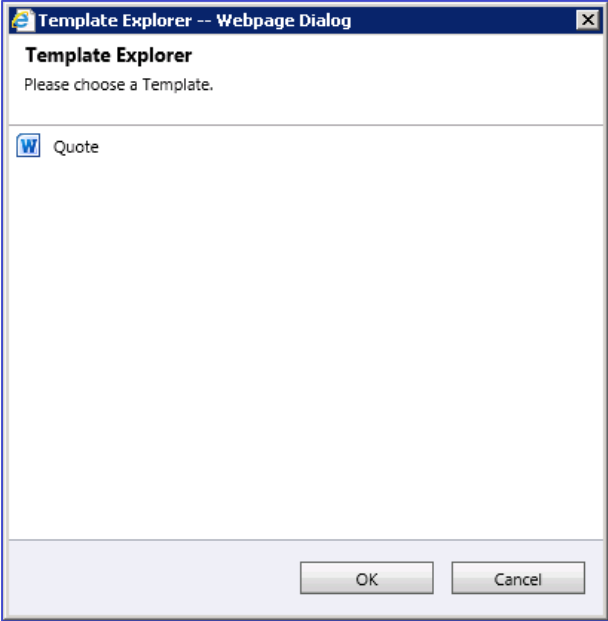
After creating the templates and integrating them into the “Word templates” entity, they can be used productively.

Open the corresponding record (in our example the quote) and click the “Word” button in the menu bar.

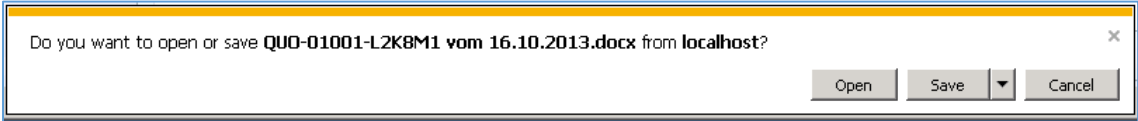


With the **Enterprise version** of the Word-Interface for Microsoft Dynamics CRM you can create any number of templates for every entity. The template explorer lists all active templates of the selected entity. The template can be selected by double-clicking on the template itself or by single-clicking on it and then using the “OK” button.

With the **standard version** of the Word-Interface each entity can only contain one template. Since no selection has to be made, the download of the template starts automatically.




In the download window, the user can decide whether the template should first be saved or opened immediately.



After opening and checking it for correctness, the document can be printed and/or saved.

Result:




|

Schnittstellenwerkzuger AG  
Addou-Strae 100, D-01234 Microstadt

Scott Konersmann (sample)  
Purchasing Manager  
City Power & Light (sample)  
3397 Rancho View Drive  
Redmond 90000  
U.S.

Quote no.	QUO-01001-L2K8M1	Editor:	Schraber	Date:	10/16/2013
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**Quote**

Dear

On the basis of your inquiry we would like to submit you the following quote:

Pos.	Amount	Description	Unit price net	Total price net
1	1.00	WordInterface	€960.00	€960.00
2	1.00	Software Assurance for WordInterface	€317.00	€317.00
<b>Final totals (net)</b>				<b>€1,277.00</b>

This quote is valid until and adds the legal effective value-added tax.

The general terms of the ~~Schnittstellen~~ AG apply.

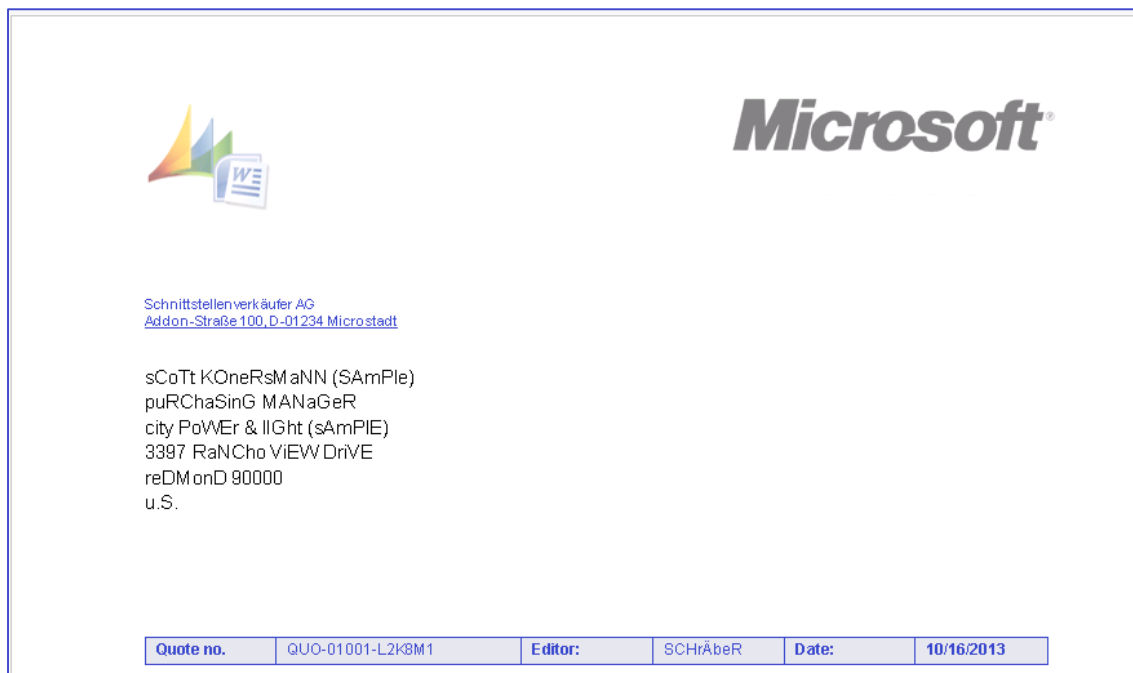
Kind regards  
Your Schnittstellen AG

### 6.3. Demo restrictions for test versions

Demo restrictions for finally creating a document occur when using a test version or a time-limited version of the Word-Interface for Microsoft Dynamics CRM.

The interface is fully operational and can also be used for testing purposes. The demo restrictions however affect to final document to that capital and small letters are used arbitrarily and the generated document cannot be used.

*Ist eine Test- oder eine zeitlich begrenzte Version der Word-Schnittstelle für Microsoft Dynamics CRM un Einsatz, stößt man bei der finalen Erstellung der Dokumente auf die Demobeschränkung.*



In order to prolong your test version or purchase a license key without time limitation, please contact us.

For contact details see the last page of this user manual.

If you have any questions about the CRM Word-Interface or need additional support, do not hesitate to contact us.

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Informationen zur CRM-Word-Schnittstelle: [www.crmwordschnittstelle.de](http://www.crmwordschnittstelle.de)

Vorstand: Andreas Donaubauer

Aufsichtsratsvorsitzende: Andrea Striegler

Amtsgericht Leipzig

HRB 23063

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