



CRM Word Interface

Installation and configuration manual

CRMWordInterface – for MS CRM

Version: 8.1.0

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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 2016 and Microsoft Dynamics 365](#).

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

2 Installation

2.1 Requirements

A requirement for the installation of the CRM Word Interface is an installed and working Microsoft Dynamics CRM system. The installation of the CRM Word Interface must be performed by a user who has got the role of a system administrator in the correlating CRM system.

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

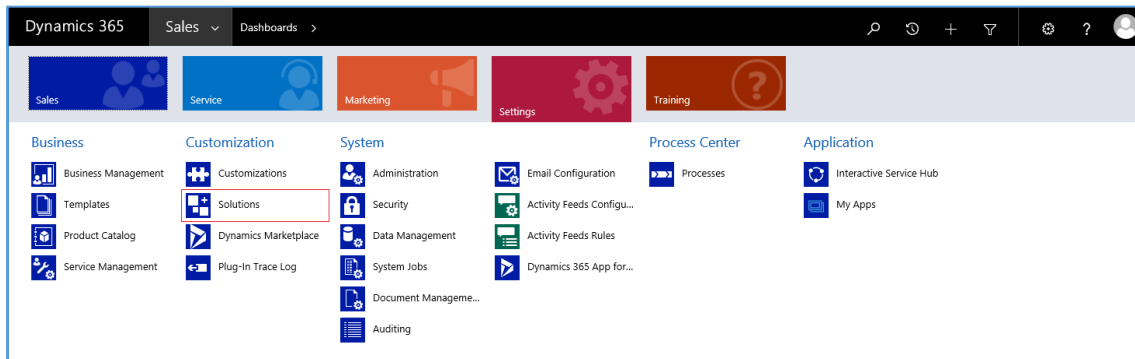
The document format docx., which is provided from Microsoft Office Word 2007 on, is used to singularly create Word templates.

2.2 Installations-guidelines

2.2.1 Importing the solution

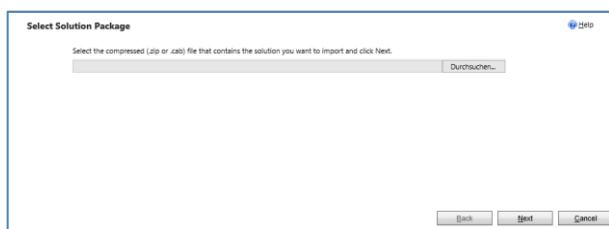
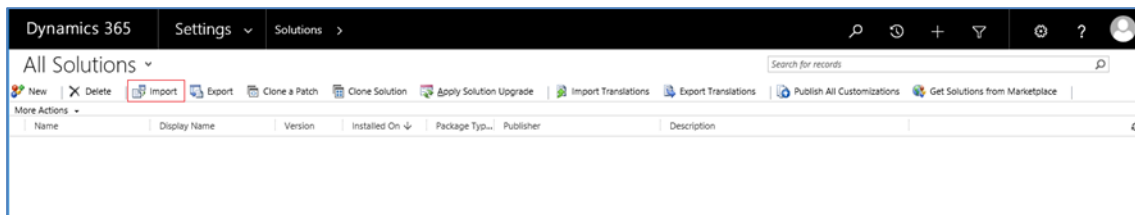
The most current version of the solution for the CRM Word Interface is provided to download on our Webseite: www.donaubauer.com.

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

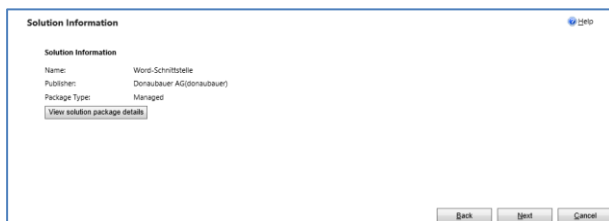


All current solutions of your CRM system are displayed here.

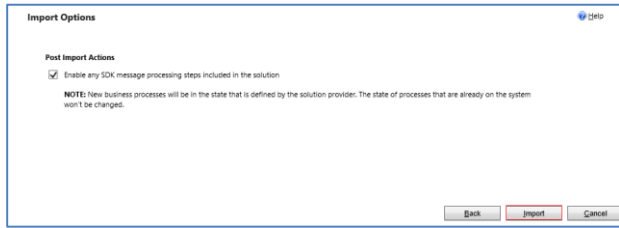
Now, click on the „Import“ button in the toolbar. The assistant, who guides you through the installation, will open up.



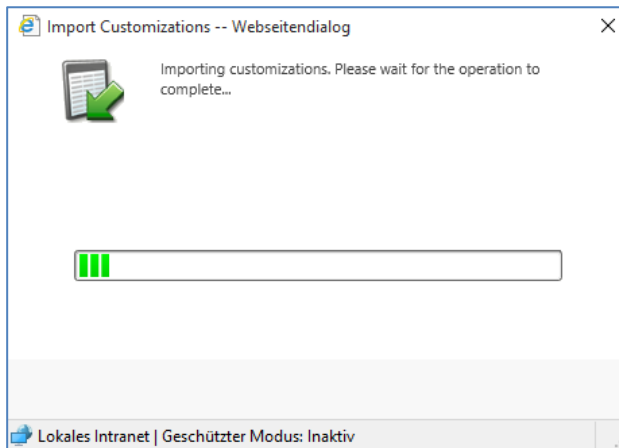
Use the button „Durchsuchen“ to select the solution and open it up. Complete this step by clicking the “Next” button.



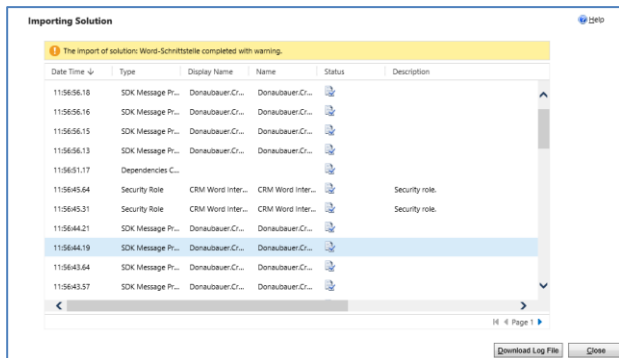
The following solution information will be displayed and



in the next window it is required to let the box checked to activate the process units for SDK notifications that are integrated into the solution. This needs to be done before the import can start.

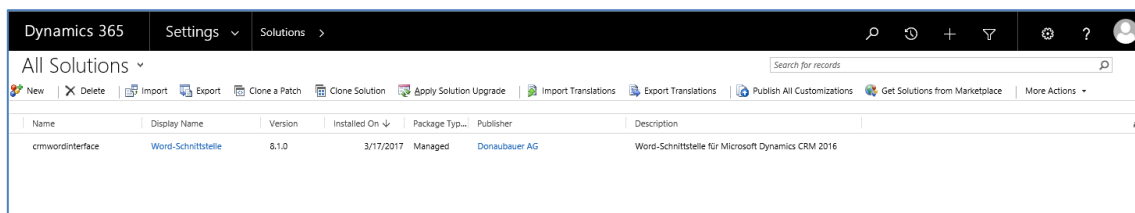


After the import of the solution, which could take a few seconds,



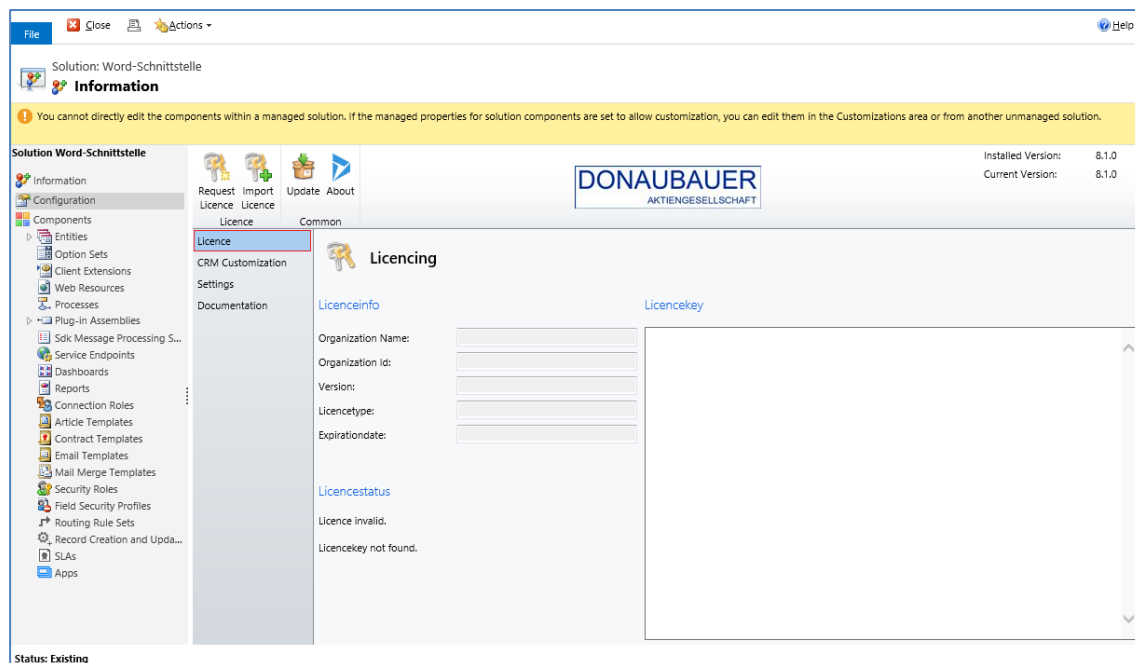
the process ends displaying a log file.

In the CRM system under the entity "solutions" a entry named "crmwordinterface" will appear (display name: Word-Interface).



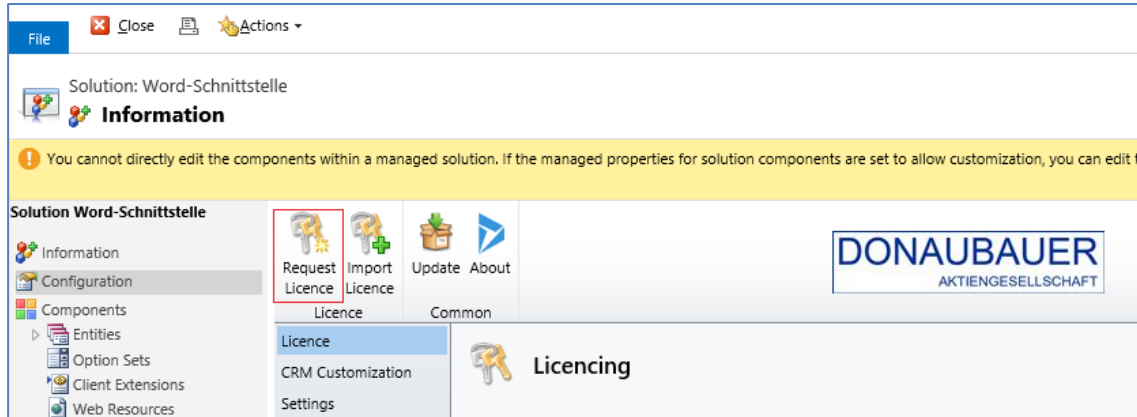
2.3 The licencing

To receive a license for the CRM Word Interface addon, the solution will be opened.
In case of an successfull installation a configuration data record will open up in the solution.
A button named "Licence" will appear in the left sitemap of the data record.



2.3.1 Automated license requesting

The section "Licence" contains a button titled "Request Licence". You need to click it to progress.



Licence Request

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

Your E-Mail address*

```
<WordInterface>
  <orgname>InterfaceTest</orgname>
  <organizationid>2131767e-c508-e711-811d-00155d00f372</organizationid>
  <version>8.1.0</version>
  <expirationdate>2017-04-16</expirationdate>
  <type>Enterprise</type>
</WordInterface>
```

2. Softwarepflege (Software Assurance)

Durch den Abschluss eines Softwarepflegevertrages stellt die Donaubauer AG dem Kunden während der Laufzeit dieses Softwarepflegevertrages alle Softwareupgrades zu dem vom Kunden lizenzierten Add-On kostenfrei zur Verfügung.

Am Ende der Laufzeit des Softwarepflegevertrages kann der Softwarepflegevertrag jeweils wieder für eine bestimmte Laufzeit kostenpflichtig erneuert werden. Wird der Softwarepflegevertrag am jeweiligen Laufzeitende nicht erneuert, so endet dieser, kann nicht wieder verlängert werden und für nachfolgende Softwareupgrades ist eine Neulizensierung des Add-On's notwendig.

Der Gegenstand des Softwarepflegevertrages ist dabei nur die Bereitstellung von Produktupgrades, nicht aber Installation, Konfiguration oder Erstellung von Inhalten im Add-On.

4. Upgrades und Updates

Ein Produkt, das als Upgrade oder Update dieses Add-On's gekennzeichnet ist, kann nur erworben und genutzt werden, wenn Sie die Lizenz für das Add-On bereits besitzen und diese verwenden dürfen. Jedes Upgrade und Update ist kostenpflichtig zur Lizenz für das Add-On zu erwerben, ausgeschlossen, es wurde die entsprechende Softwarepflege (siehe Punkt 3.) erworben.

5. Datenverlust

Der Kunde selbst muss sicherstellen, dass alle Datenbestände seiner Softwarelösungen in regelmäßigen Abständen gesichert und archiviert werden. Eine Haftung bei Datenverlust, gleich welcher Art, wird von der Donaubauer Aktiengesellschaft ausgeschlossen.

☒ I accept the terms of this license agreement.

Depositing an email-address is essential. After that you should accept the licence agreement by leaving a check mark in the suitable box.

In case you are not willed to accept the licence agreement it is possible to cancel this operation by clicking the button "Cancel" in the lower right corner of the window.

To keep your CRM system stable you should uninstall the CRM Word Interface how it is described in this manual.

Licencing

Licenceinfo

Organization Name:

Organization Id:

Version:

Licence type:

Expiration date:

Licencekey

Importing Licence

By clicking "Continue" the CRM Server establishes a one-time connection to our Licencing Server which transfers the automatically created licence key.

Licencing

Licenceinfo

Organization Name: Interface

Organization Id: 2131767e-

Version: 8.1.0

Licence type: Enterprise

Expiration date: 2017-04-16

Licencekey

PFdvcmRJbnRlcmZhY2U+PG9yZ2F0aW9uaWQ+MjEzMTc2N2UIYzU+pb25pZD48dmVyc2lvbj44LjEuMDWuW9uZGF0ZT4yMDE3LTA0LTE2PCDBhejVEVVNUZFdVZy9FQ09TcFVlOUHpTVGd1Unc1SUZuSEpZN2JlKytUTGxINDRyMy85VExLY29qaXcYmpDTzF0SmooU09YMWVseHRITSiBwQWtkOTdoZEc0U0k4VktTYUhhBUjNmZDcwMjZDck5lUEZEZQ1pYlKdTVIRUVVOVdDdETTnhb0UvZkJeYWNW9uSi95LzNjOGw2cWJXMMVYrj0VCMVJwUnhwU3ovdmY3YTZRjMQ2hKeEpGLzM1MTh3Z1JwNzIXxl0FnrTJYd1Zxd2hCcEMydwk1QGhBRXVIS3JVbk9LMGRlak5NNWf89PC9TaWduYXR1cj48L1dvcmRl

Licencestatus

Licence valid.

After importing the licence it will take a few seconds until the data record is automatically filled with the licence data.

When the import of the licence key was successful the following information will be displayed.

Organisation name:	Name of the organisation, which uses the interface
Organisation ID:	ID of the organisation, that uses the interface
Version:	Version number of the interface
License type:	Standard or enterprise version of the interface
Expiration date:	Expiration date of the interface. When you purchased the CRM Word Interface this field remains empty (no testing licence).

2.3.2 Licence requesting without internet connection

In the event that the CRM server is not able to connect to the internet, you should push the button "Request Licence". The window shown in the screenshot below will open.

If that happens we would like you to send us the information via email at the following address:
lizenzen@donaubauer.com.

In this case send an email with the displayed information at lizenzen@donaubauer.com. With this information a licence will be created manually and delivered by email.

Attention:

To avoid delay and unnecessary enquiry please copy the information to an email before sending. Do not create any screenshot.

The licence key will be delivered via email.

Next the licence key needs to be copied into the area "License key" (1) and the button "Import Licence" has to be clicked. (2).

Like already described in the passage "Automated licence requesting" you have to accept the EULA (End User Licence Agreement) and then press the "Next" button for completing this step.

If you do not want to accept the licensing agreement you have the possibility to cancel the process by clicking the "Decline" button in the lower right corner. To avoid stressing the CRM system you should uninstall the CRM Word Interface according to the description in this manual.


Licensing

Licenceinfo	Licencekey
Organization Name:	Interface
Organization Id:	2131767e-
Version:	8.1.0
Licencetype:	Enterprise
Expirationdate:	2017-04-16
Licencestatus	
Licence valid.	PFdvcmRJbnRlcmZhY2U+PG9yZ2 F0aW9uaWQ+MjEzMTc2N2UyZU pb25pZD48dmVyc2lvbj44LjEuMDw W9uZGF0ZT4yMDE3LTA0LTE2PC DBhejVEVvNUZFdvdZy9FQ09TcFV OUHpTVGd1Unc1SUZuSEpZN2JjM KytUTGxlNDRyMy85VExLY29qaXc YmpDTzF0SmxxU09YMWVseHRIT SIBwQWtkOTdoZE0U0k4VktTYUI hBUjNmd2cwMjZDck5iUEZEQ1pY KdTIVRUVOVDdETTnhb0UvZkUle YNW9uSi95LzNjOGw2cWJXMXVYr 0VCMVJwUnhwU3ovdmY3YTZRy MQ2hKeEpGLzM1MTh3Z1JwNzIX xL0FnRTJYd1Zxd2hCcEMydwk1Q GhBRXVIS3Jvbk9LMGRJlak5NNW 89PC9TaWduYXR1cj48L1dvcmRJt

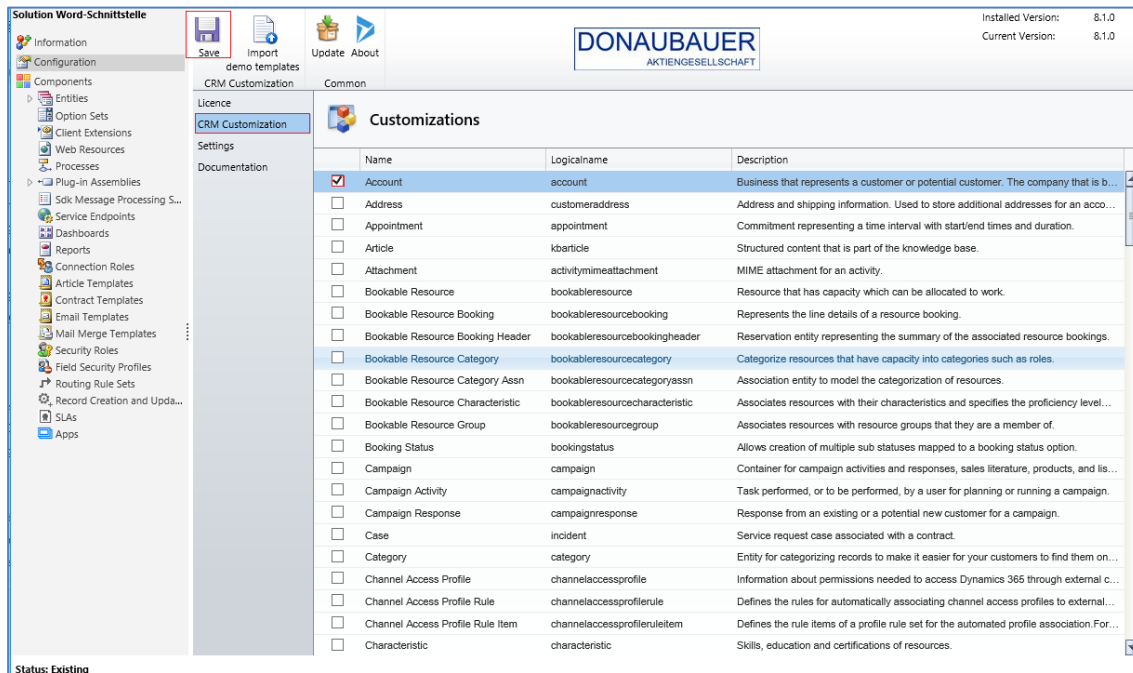
Past the license import the boxes for "Licenceinfo" are automatically filled with the current data of your license key.

3 Configuring the interface

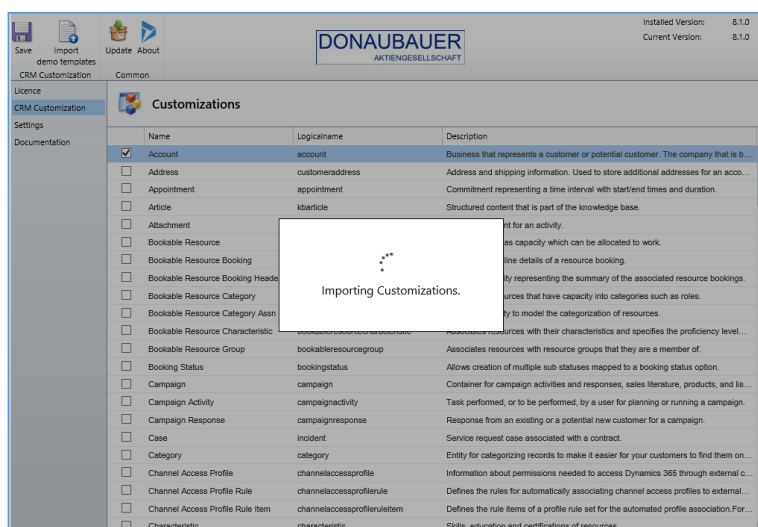
Configuring the CRM Word Interface occurs via the menu item "CRM Customization" located in the sitemap.

After opening "CRM Customization" all entities that exist in the CRM system (including the user-specific) will be listed alphabetically in the display panel. For all entities that are used to create word documents by using the CRM Word interface need to get ticked in the appropriate checkbox.

The procedure will be terminated by clicking the "Save" button.



Depending on the system's performance this operation may take from a few seconds to a several minutes.



There is a possibility to configure every entity individually or various at the same time. Furthermore it is possible to configure every single entity afterwards.

4 „Settings“ of the CRM Word Interface

Over the navigation button "Settings" of the Microsoft Dynamics CRM system the entity "Solutions" will be opened up.

In the configuration page you can find a menu item called "Settings". There you can find all available settings for interface analysis:

Settings

Logging

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

Tracing

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

Document Settings

Remove Tags? ☒
 Controls used in the template. This enables application that do not support this feature to display the document. Leaving the controls in the document will enable further processing based on those controls.
 Timeout (s):
 The Timeout determines after which time period the processing of a template will be aborted. The default value is 300 seconds.

TemplateExplorer Settings

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

4.1 Log-Level

The log level indicates which error messages will be recorded.

The logging for these events happens in the entity "event log".

The following inputs are possible:

- Off:** No reports will be logged (Level 1)
- Error:** Only error messages will be logged (Level 2)
- Warning:** Error messages and warnings will be logged (Level 3)
- Information:** All reports will be logged (Level 4.)
- Tracing Level:** The tracing is used to raise detailed data for troubleshooting. The tracing level settings help to adjust the degree of detail.
The higher the tracing level, the more information is collected.

4.2 Tracing categories

The tracing category setting provides the option to limit the tracing to one or more sections. The value you need to enter is formed by the sum of the values of the desired categories. Possible categories are:

Time measurement (1),
Parameter (2),
Return values (4)
Variables (8)
Program flow (16)
Licensing (32)
and other (64).

4.3 Remove tags

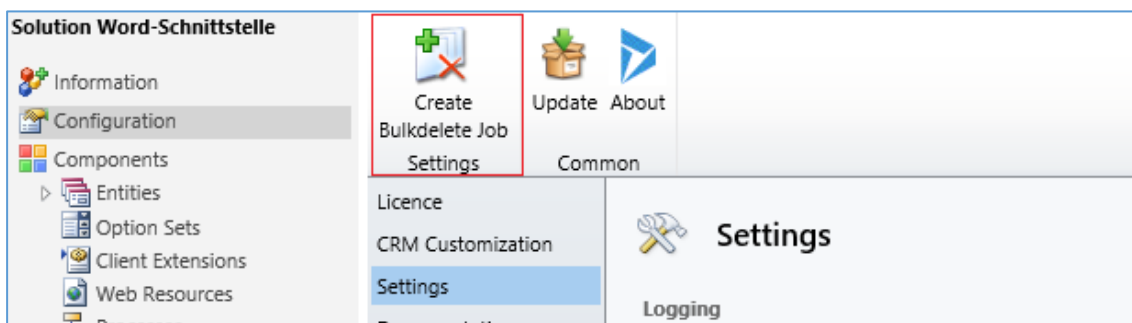
That option determines if the CRM Word Interface should remove the template's RichText control elements from the document after generating it. As a result you are able to open the document with applications that do not support this feature (e.g. WordPad). When the control elements are kept in the document you are able to process the document further.

4.4 TemplateExplorer size

The TemplateExplorer only opens up in the CRM Word Interface when there is an enterprise version in use and there are multiple templates available for the current entity. The TemplateExplorer's initial size can be fitted globally. The dimensions are specified in "width, height". The data is shown in pixel (default value is 400, 390).

4.5 Additional Settings

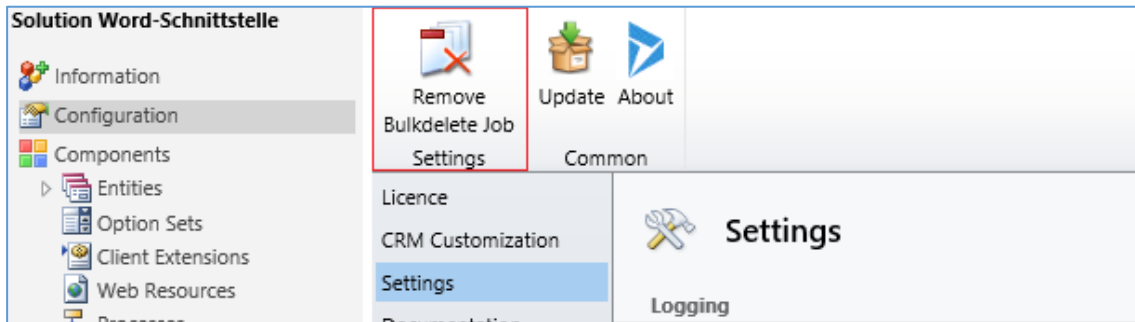
In the menu bar you can find an area which is called "Settings". This section contains an additional button named "Create Bulkdelete Job".



When using the CRM Word Interface normally, it occurs that notes are created in the background as dummy objects. But these could not be deleted right away.

Herefore a bulkdelete job is necessary. That job is created in the system by clicking the button for this operation. As a result the system will be cleaned up from notes that are no longer required (only the notes created by the CRM Word Interface will be deleted).

As soon as the job was generated the button will change to "Remove Bulkdelete Job".



The Bulkdelete Job only should be removed when the CRM Word Interface is no longer required and you want to uninstall it.

All entries in the section "Settings" will be saved automatically when leaving the data record.

4.6 The solution „cwicustomizations“

After leaving the solution "crmwordinterface" and if necessary refreshing the entity "Solutions", there will be another entity "cwicustomizations" belonging to the CRM Word Interface. The display name of this solution is "CRM Word Interface Customization Solution".

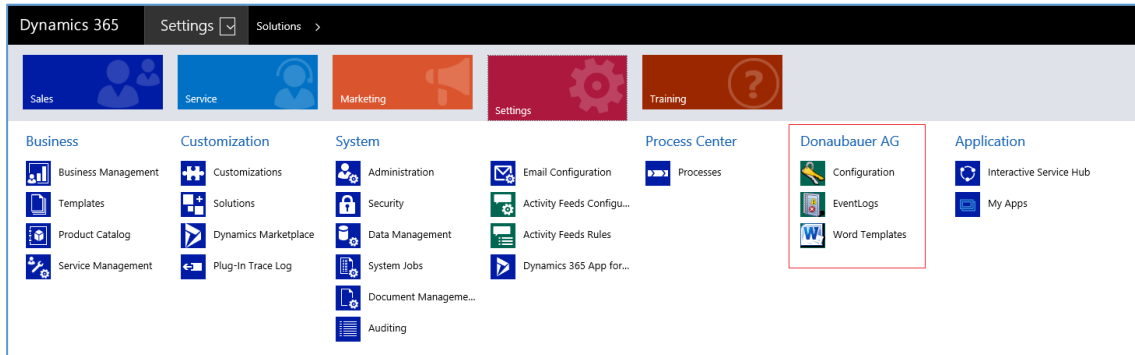
Name	Display Name	Version	Installed On	Package Type	Publisher	Description
cwicustomizations	CRM-Word-Interface Cust...	5.0.0	3/22/2017	Unmanaged	CRM Word Interface Customization P...	
crmwordinterface	Word-Schnittstelle	8.1.0	3/22/2017	Managed	Donaubauer AG	Word-Schnittstelle für Microsoft Dynamics CRM 2016

In the automatically created solution "cwicustomizations" all entities that should be used by the CRM Word Interface are listed.

Display Name	Name	Type	State	Customizable	Description
Account	account	Entity	Managed	True	Business that represents a customer or potential cust
Contact	contact	Entity	Managed	True	Person with whom a business unit has a relationship,
Lead	lead	Entity	Managed	True	Prospect or potential sales opportunity. Leads are co
Quote	quote	Entity	Managed	True	Formal offer for products and/or services, proposed i

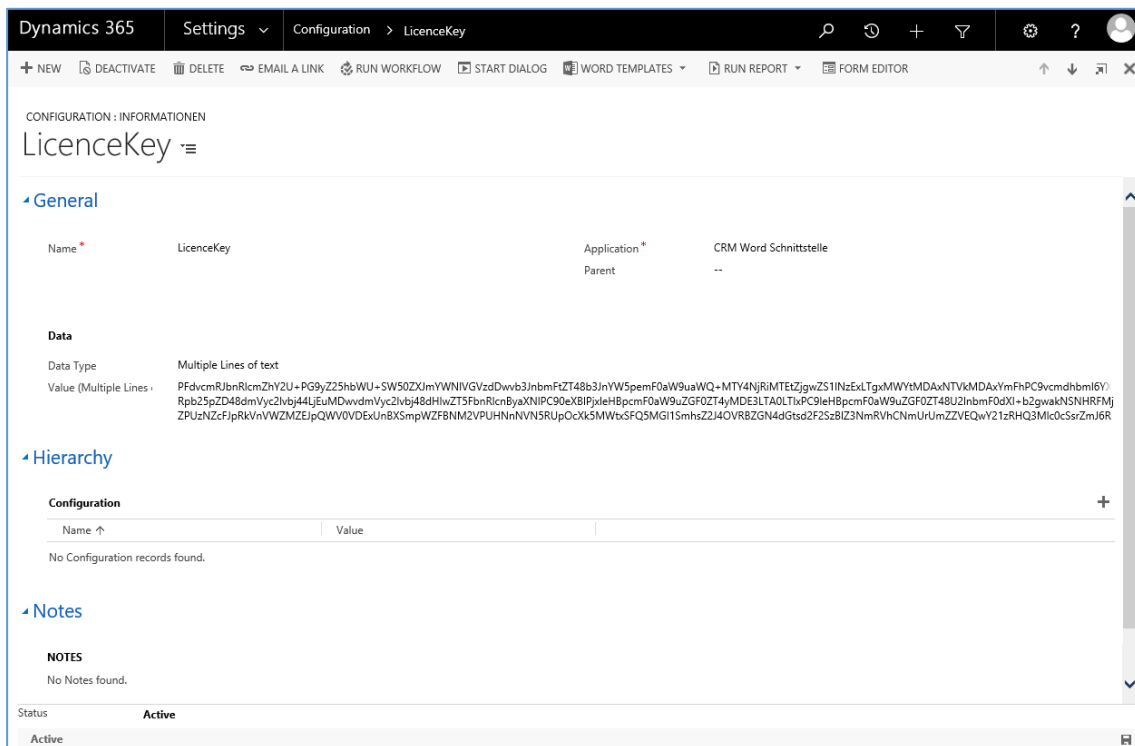
4.7 Additional entities

Under use of the navigation button "Settings", of the Microsoft Dynamics CRM system, new entities were created under the heading "Donaubauer AG".



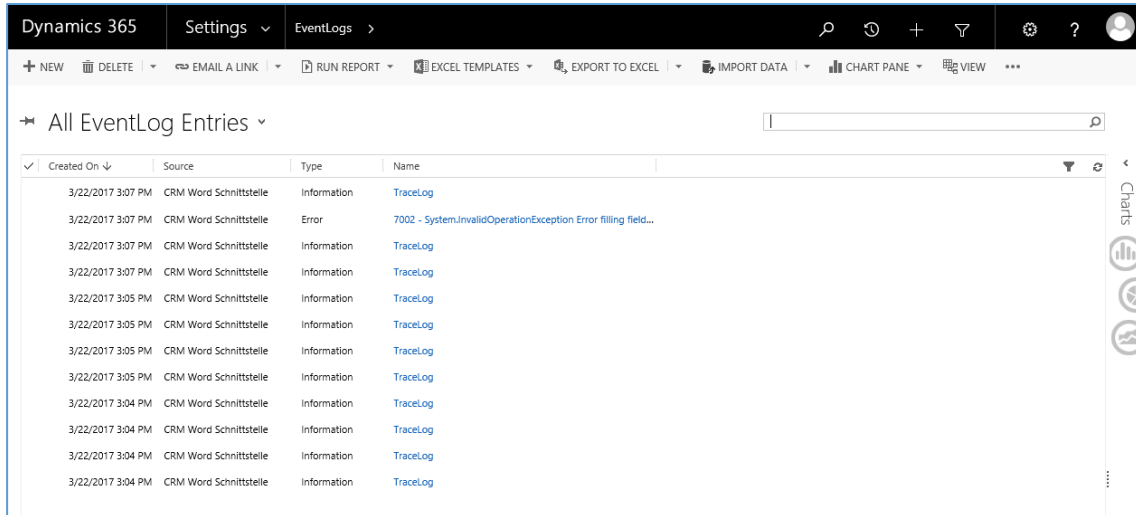
4.7.1 Entity „Configuration“

The entity "Configuration" contains the current license key.



4.7.2 Entity „Event protocols“

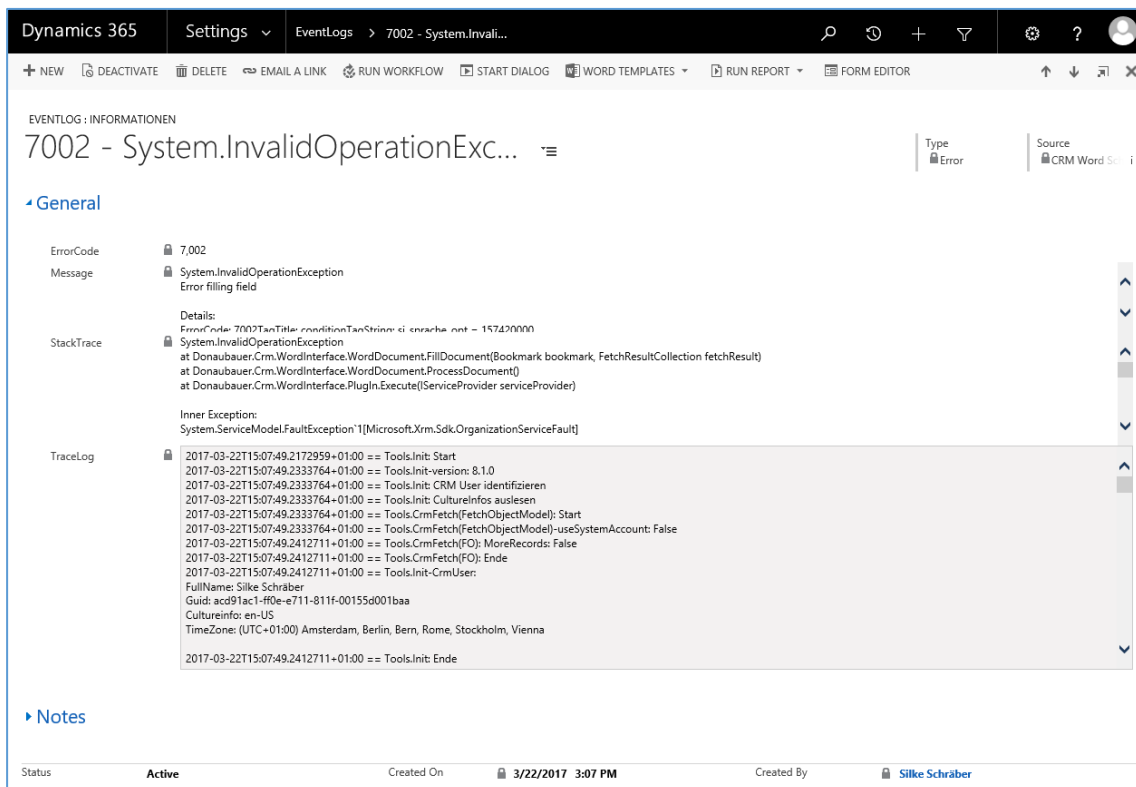
In the entity "Event protocols" are no entries evident yet. Occuring errors will be documented here.



The screenshot shows the Dynamics 365 interface with the 'EventLogs' entity selected. The table 'All EventLog Entries' contains the following data:

Created On	Source	Type	Name
3/22/2017 3:07 PM	CRM Word Schnittstelle	Information	TraceLog
3/22/2017 3:07 PM	CRM Word Schnittstelle	Error	7002 - System.InvalidOperationException Error filling field...
3/22/2017 3:07 PM	CRM Word Schnittstelle	Information	TraceLog
3/22/2017 3:07 PM	CRM Word Schnittstelle	Information	TraceLog
3/22/2017 3:05 PM	CRM Word Schnittstelle	Information	TraceLog
3/22/2017 3:05 PM	CRM Word Schnittstelle	Information	TraceLog
3/22/2017 3:05 PM	CRM Word Schnittstelle	Information	TraceLog
3/22/2017 3:04 PM	CRM Word Schnittstelle	Information	TraceLog
3/22/2017 3:04 PM	CRM Word Schnittstelle	Information	TraceLog
3/22/2017 3:04 PM	CRM Word Schnittstelle	Information	TraceLog
3/22/2017 3:04 PM	CRM Word Schnittstelle	Information	TraceLog

In case that the error message is to long for the deposited array, an activity "note" will be attached to the relating data record.



The screenshot shows the details of the error entry '7002 - System.InvalidOperationException Error filling field...'. The 'General' tab is active, displaying the following information:

- ErrorCode:** 7,002
- Message:** System.InvalidOperationException Error filling field
- StackTrace:**

```

Details:
Error: 7002TanTitle conditionTanString ci cnrache not - 157420000
System.InvalidOperationException
at Donaubauer.Crm.WordInterface.WordDocument.FillDocument(Bookmark bookmark, FetchResultCollection fetchResult)
at Donaubauer.Crm.WordInterface.WordDocument.ProcessDocument()
at Donaubauer.Crm.WordInterface.Plugin.Execute(IServiceProvider serviceProvider)

Inner Exception:
System.ServiceModel.FaultException`1[Microsoft.Xrm.Sdk.OrganizationServiceFault]

```
- TraceLog:**

```

2017-03-22T15:07:49.2172959+01:00 == Tools.Init: Start
2017-03-22T15:07:49.2333764+01:00 == Tools.Init-version: 8.1.0
2017-03-22T15:07:49.2333764+01:00 == Tools.Init: CRM User identifizieren
2017-03-22T15:07:49.2333764+01:00 == Tools.Init: CultureInfos auslesen
2017-03-22T15:07:49.2333764+01:00 == Tools.CrmFetch(FetchObjectModel): Start
2017-03-22T15:07:49.2412711+01:00 == Tools.CrmFetch(FetchObjectModel)-useSystemAccount: False
2017-03-22T15:07:49.2412711+01:00 == Tools.CrmFetch(PO): MoreRecords: False
2017-03-22T15:07:49.2412711+01:00 == Tools.CrmFetch(PO): Ende
2017-03-22T15:07:49.2412711+01:00 == Tools.Init-CrmUser:
FullName: Silke Schröder
Guid: acd91ac1-f0e-e711-811f-00155d001baa
CultureInfo: en-US
TimeZone: (UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna
2017-03-22T15:07:49.2412711+01:00 == Tools.Init: Ende

```

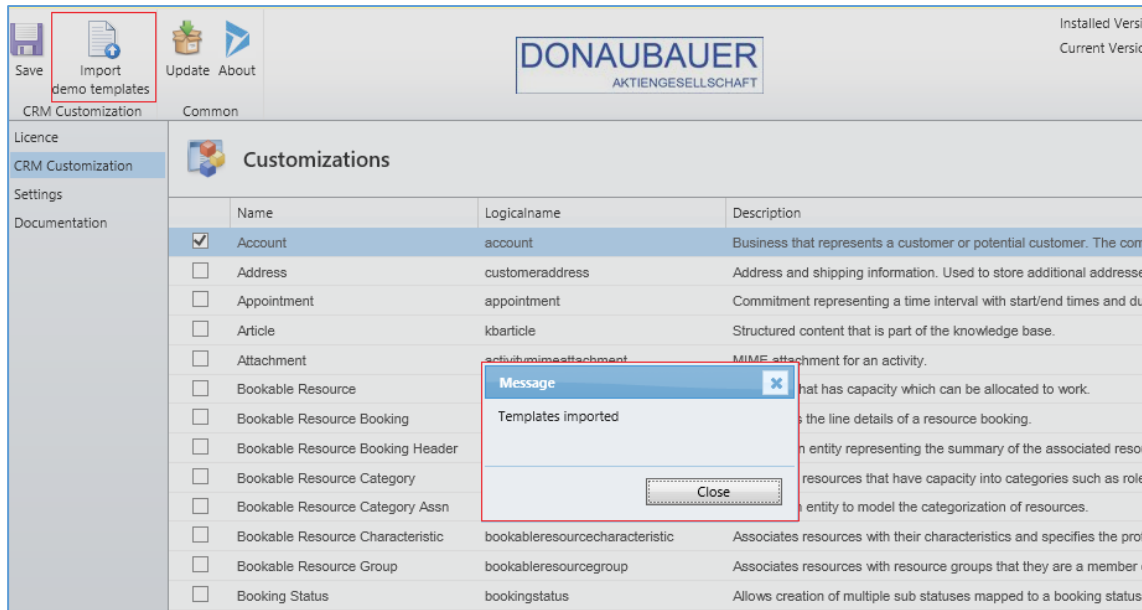
The 'Notes' tab is also visible at the bottom.

That notes can be used for error analysis.

4.8 The template

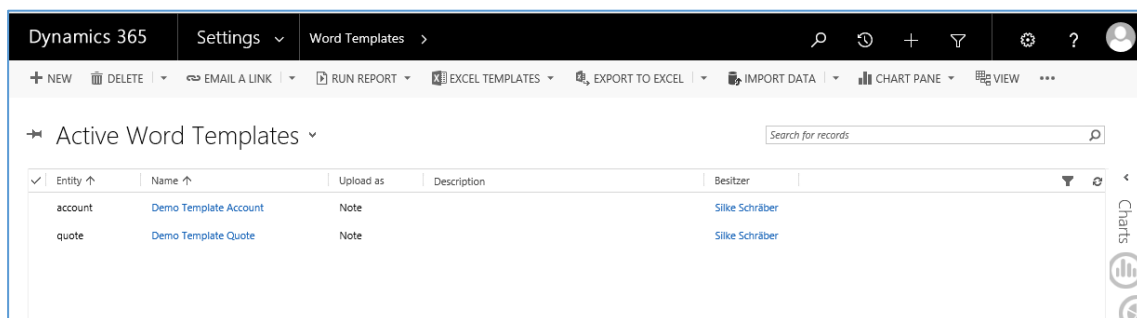
You can use the entity "Word templates" to administrate the templates you created previously. How the creation exactly works is documented in our user manual. To simplify the creation of templates you can use the demo template for the entities "account" and "quote" which are included in the software package of the CRM Word Interface. The activation occurs as explained in the following:

In the solution of the CRM Word Interface in the section "CRM customizations" you can find the button "Import demo templates" in the menu bar.

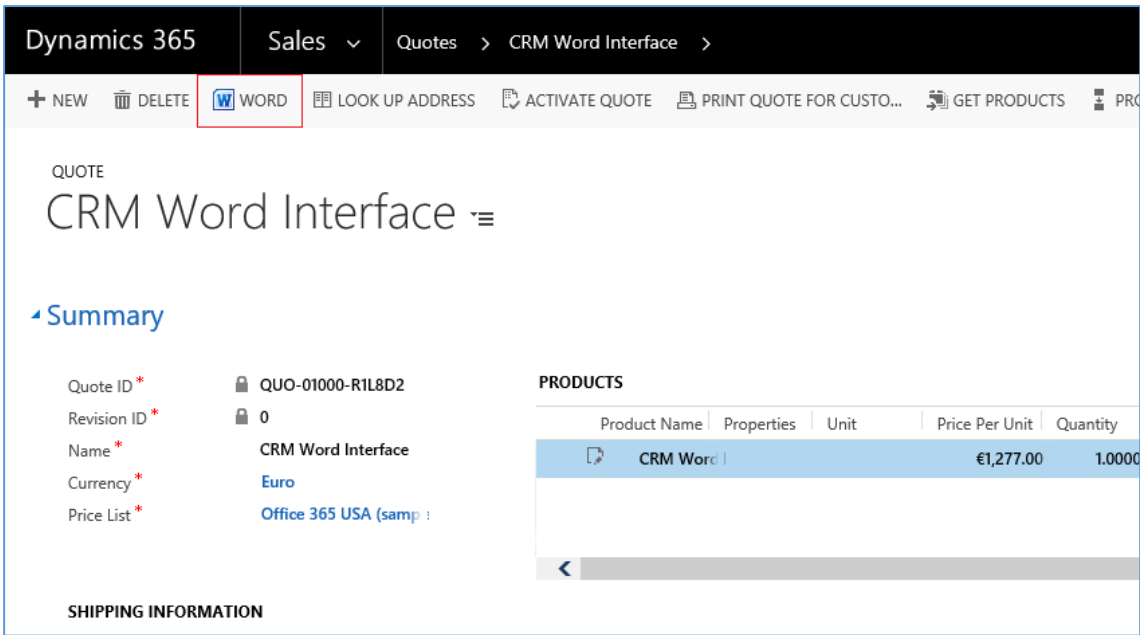


After importing the demo templates the window can be closed.

The templates are displayed in the view "Active Word Templates".



When the Word-Button is active, it will be displayed in all selected entities (for our example the quote).



Now the CRM Word Interface is completely installed and configured.

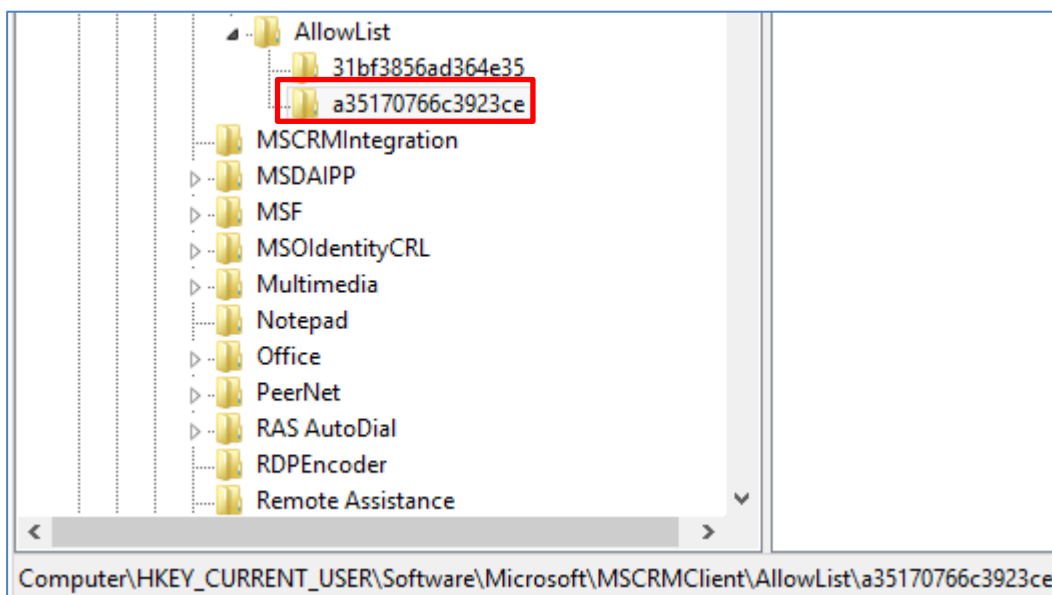
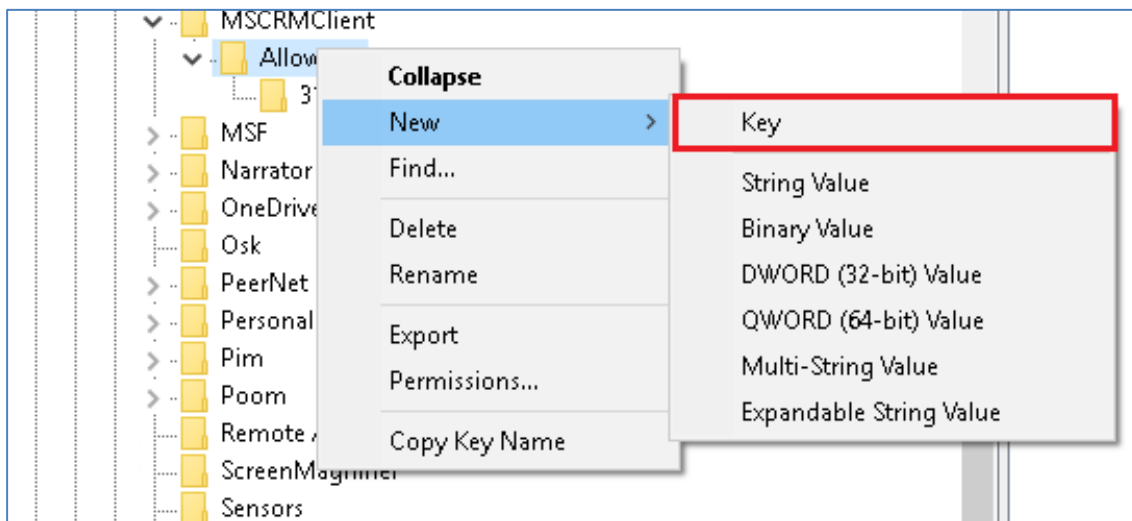
5 CRM-Offline-Functionality

To use the CRM Word Interface offline the plug-in for the CRM Word Interface has to be added to the AllowList of the CRM Outlook Client.

That needs to be done via registry entry.

For the offline functionality paste the following registration key into the registry:

`HKEY_CURRENT_USER\Software\Microsoft\MSCRMClient\AllowList\{a35170766c3923ce}`



Now the word interface is also available offline.

6 Rights and security roles

In order for the end user to be able to access the CRM Word Interface for work, it is necessary that the selected users get sufficient rights for the entities "notes" and "Word Interface". These rights are defined by security roles.

There are two security roles contained in the package of the CRM Word Interface.
A distinction is made between the role of the CRM Word Interface administrator and an CRM Word Interface user.

File Save and Close Actions Help

Security Role: CRM Word Interface Administrator Working on solution: Default Solution

Details Core Records Marketing Sales Service Business Management Service Management Customization Missing Entities Business Process Flows Custom Entities

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Condition Value	●	●	●	●	●	●		
Configuration	●	●	●	●	●	●		
EventLog	●	●	●	●	●	●		
Filter	○	○	○	○	○	○	○	○
Post Configuration	○	○	○	○	○	○		
Post Rule Configuration	○	○	○	○	○	○		
Profile Album	○	○	○	○	○	○	○	○
Wall View	○	○	○	○	○	○		
Word Template	●	●	●	●	●	●	●	●
Word Template Condition	●	●	●	●	●	●		

Key
○ None Selected ● User ● Business Unit ● Parent: Child Business Units ● Organization

File Save and Close Actions Help

Security Role: CRM Word Interface User Working on solution: Default Solution

Details Core Records Marketing Sales Service Business Management Service Management Customization Missing Entities Business Process Flows Custom Entities

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Condition Value	○	●	○	○	○	○		
Configuration	○	●	○	○	○	○		
EventLog	●	●	○	○	○	○		
Filter	○	○	○	○	○	○	○	○
Post Configuration	○	○	○	○	○	○		
Post Rule Configuration	○	○	○	○	○	○		
Profile Album	○	○	○	○	○	○	○	○
Wall View	○	○	○	○	○	○		
Word Template	○	●	○	○	○	○	○	○
Word Template Condition	○	●	○	○	○	○		

Key
○ None Selected ● User ● Business Unit ● Parent: Child Business Units ● Organization

Thereby all required rights and securities are pre-installed so that it is not necessary to configure them manually anymore.

7 CRM Metadata-Browser

Given the fact, that tags in Microsoft Office Word can not be longer than 64 characters, it could happen, that the definition of a complete tag exceeds this limit. In that case it is possible to use entity numbers instead of entity names.

You can find the entity numbers with the entity metadata-browser:

<https://msdn.microsoft.com/de-de/library/hh547411.aspx>

8 New update for the CRM Word Interface

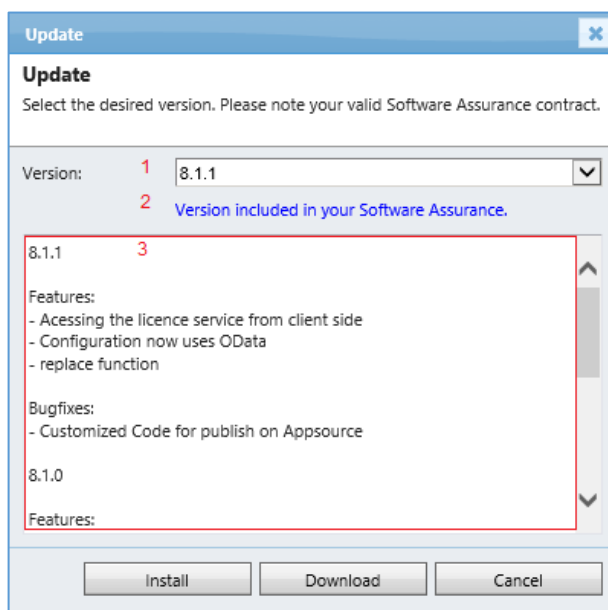
In case a new update for the CRM Word Interface is available you can directly download and install it from the solution.

As with the installation of the CRM Word Interface you have to go to "Settings" in the navigation area of your Microsoft Dynamics CRM system. Call up the entity "Solution" in the left application area and open the solution "crmwordinterface" by double clicking the configuration site.

As well as in the installation of the interface the following window will open up. In the upper right corner you can find information about the installed version and of course about the current version of the CRM Word Interface.



If there is a newer version available than the one that is currently installed you can start the update routine by hitting the "Update" button. After you have done this the following window will be displayed.



- 1 Versions which are available for download.
- 2 Notification if the displayed version is covered by the software assurance you purchased, so you have the permission for downloading this content.
- 3 Detailed description about the new version's features and which known bugs from the former version were fixed.

It is possible to decide whether the new version is installed directly or if the solution should be downloaded for installing it manually.

By "Install" a new version is directly imported and becomes available in a short time.

By "Download" the current version will be provided for download as a zip-file.

In case the update should not be performed you can stop the routine by clicking "Cancel".



9 Uninstalling the CRM Word Interface

As well for in the installation of the interface you have to go to the navigation area of your Microsoft Dynamics CRM system. Enter the section "Settings" to deactivate the CRM Word Interface. Now you have to open the configuration site of the solution.

Under the menu item "CRM Customization" there is a box in front of every entity's display name. All entities that are used by the word interface to generate word documents are marked by a hook in the provided box.

This check mark needs to be removed from all entities.
After that, complete the action by clicking the "Save" button.



Save



Import

demo templates

CRM Customization



Update



About

Common



Installed Version: 8.1.1

Current Version: 8.1.1

Licence

CRM Customization

Settings

Documentation

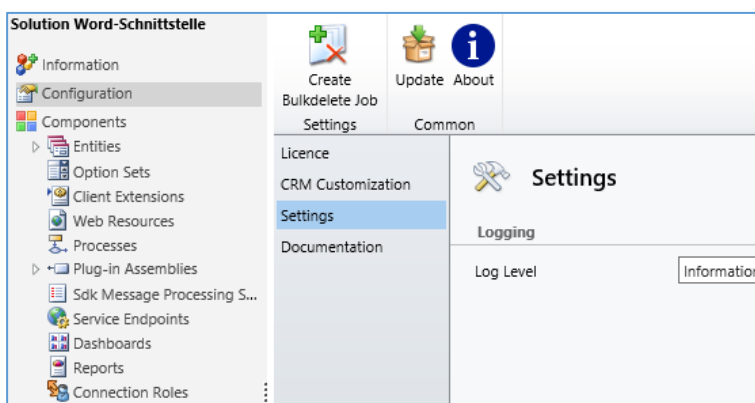


Customizations

	Name	Logicalname	Description
☐	Product	product	Information about products and their pricing information.
☐	Product Association	productassociation	Instance of a product added to a bundle or kit.
☐	Product Relationship	productsubstitute	Information about the selling relationship between two products, including the relationship t...
☐	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 on large data set...
☒	Quote	quote	Formal offer for products and/or services, proposed at specific prices and related payment...
☐	Quote Product	quotedetail	Product line item in a quote. The details include such information as product ID, descriptio...
☐	Rating Model	ratingmodel	Represents a model to evaluate skills or other related entities.
☐	Rating Value	ratingvalue	A unique value associated with a rating model that allows providing a user friendly rating v...
☐	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-progress values against the goal.

According to your systems performance this process could take a few seconds up to several minutes.

Now the bulkdelete job that was created during installation has to be removed. In order to achieve that go to the menu item "Settings".

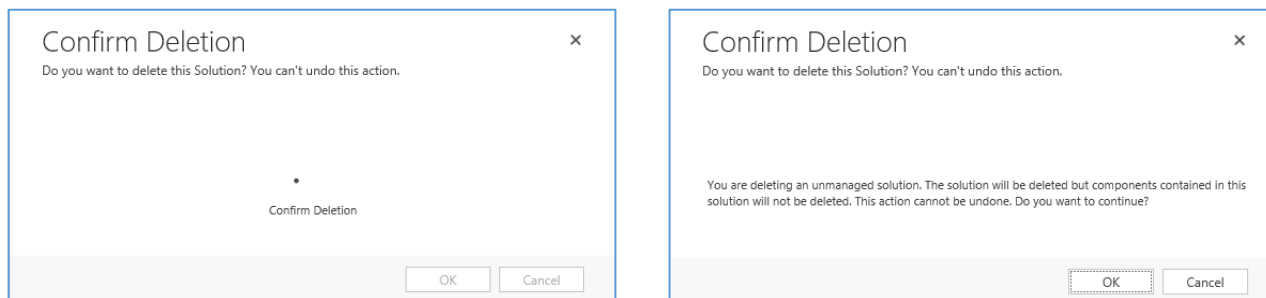


Thus all preparations for deleting the solution are done.

In the next step the solutions "crmwordinterface" and "cwicustomizations" need to be selected one by one. Then press the "Delete" button to remove them from your CRM system.

The order of deleting the solutions is irrelevant.

After the usual prompts, you need to answer with "OK", the solutions of the CRM Word Interface will be removed.



The section "Donaubauer AG" in the "Settings" navigation area was removed from the Microsoft Dynamics CRM system as well.

The CRM Word Interface is now uninstalled completely.

In case of further questions according the CRM Word Interface or other support topics please feel free to contact us.



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