



CRM Word Interface

User manual

Version 9.1.0

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1 Preface

Thank you for choosing our [CRM Word Interface](#).

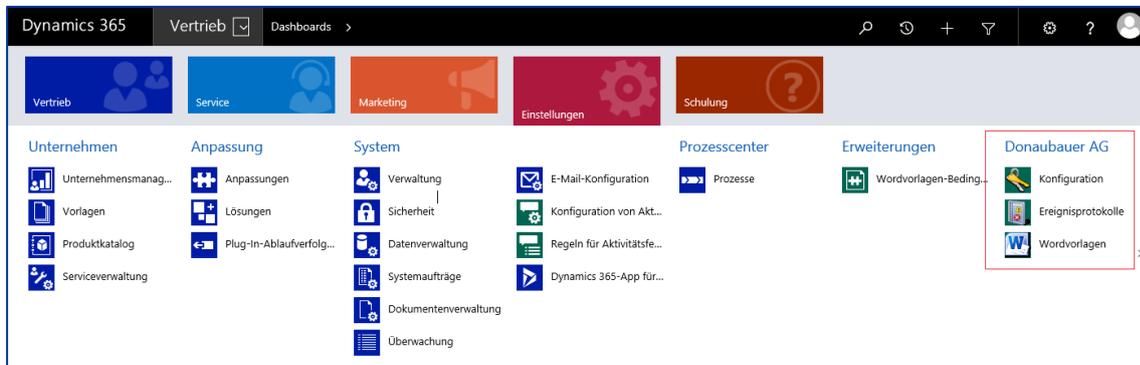
Now you have the option to easily export your CRM information into predefined Word templates. Your correspondence will be unified and optimized in terms of time.

The CRM Word Interface is an add-on for Microsoft Dynamics 365 Customer Engagement.

In the following pages you will find detailed instructions on using the CRM Word Interface version 9.1.0

2 Template management

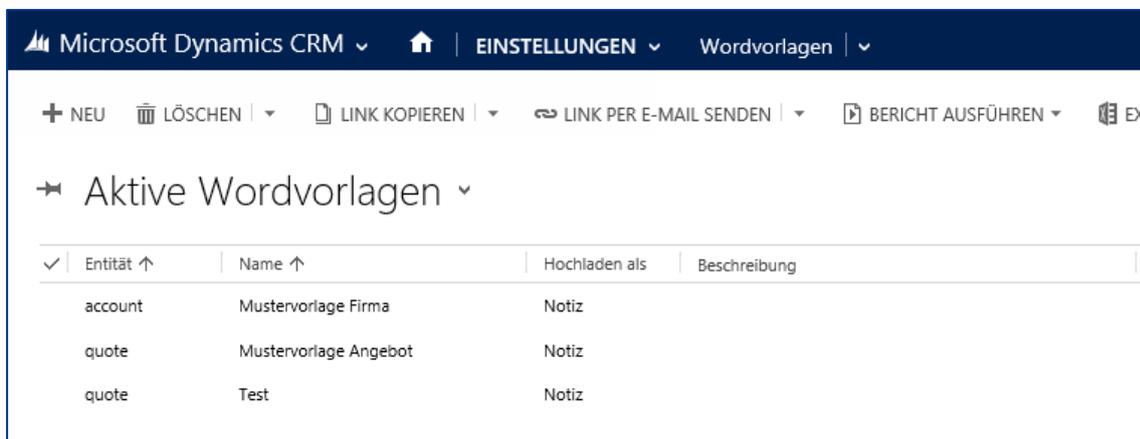
The entity “Word templates” was generated in the “Settings” area by installing the CRM Word Interface. This “Word templates” entity is used to manage the templates.



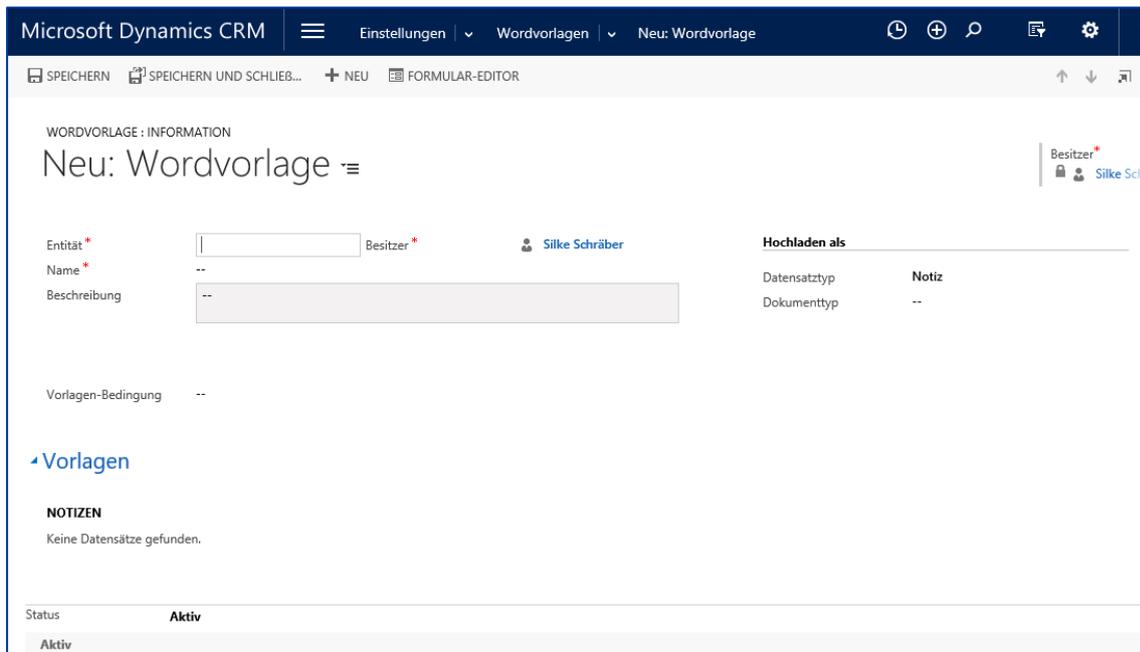
2.1 Entity “Word templates”

The “Word templates” entity creates one record per template. All created and active templates are listed. The list view shows the entity for which the template was created.

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



2.2 Adding and management of a template



When creating a “Word template” record, the following fields are filled in with data:

Entity: Saves the [schema name](#) of the entity for which the template applies.

Name: assign an unambiguous name in order to help the user to identify the correct template from the template explorer (Enterprise version)

Description: specific description of the template, is displayed as tooltip, the user can thus identify the template.

Record type: preselection of how the word document is saved in the CRM system. The user can chose from the following options:

- note
- letter
- Email
- SharePoint

Document type: preselection of the document type as which the document is saved to the CRM system. The user can chose from the following options:

- docx
- PDF
- docx & PDF

Please note:

Selecting the record type and document type is only necessary if the CRM Upload Button for the CRM Word Interface version 5.0.33 or higher was installed.

Further information on this issue you will find in the CRM Word Upload Button user manual on our homepage, <https://www.donaubauer.com/>.

Template conditions: Save conditions in order to display nothing but templates matching these conditions

Adding a new note: The original word template (.docx document) is attached to the template record as note. Whenever the .docx template was changed, it has to be exchanged in the template record's notes section as well. The CRM Word Interface always used the note saved last.

2.3 Template conditions

The amount of Word templates, which are displayed when opening the Word interface, can be reduced by setting certain conditions.

If a template matches the conditions, it will be displayed.

Please note:

Templates without any conditions are always displayed!

Now, employees only have to choose from the templates, which are eligible.

2.3.1 Operators

The user can select from the following operators in order to set conditions:

And	All conditions must be met
Or	One of the conditions must be met
Not	The condition is not met
Equal	Both values are equal
Not equal	Both values are not equal
Lesser than	Value comparison of numeric values (condition is not met with numeric equality)
Greater than	Value comparison of numeric values (condition is not met with numeric equality)
Lesser or equal than	Value comparison of numeric values
Greater or equal than	Value comparison of numeric values
Is Null	The field, which is referred to, is empty (without entry)
Is not Null	The field, which is referred to, is not empty (incl. value 0)

2.3.2 Value comparisons

2.3.2.1 Value comparison for fixed values:

Fixed values are concrete strings of characters (text), numbers or a GUID.

2.3.2.2 Value comparison for CRM queries

Depending on the entity from which the explorer is opened, a current value of a CRM field is determined and compared.

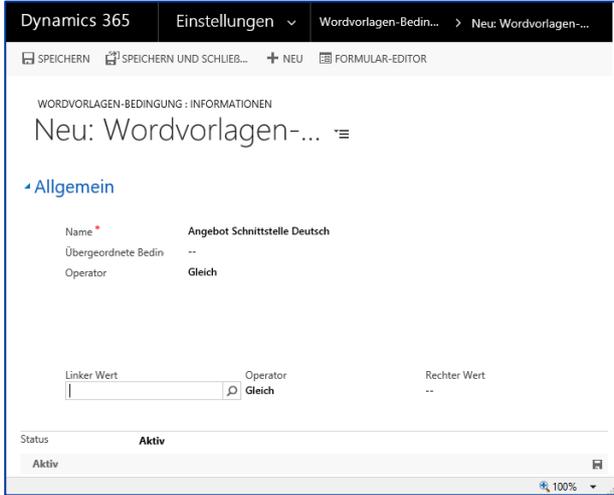
This comparison is made via the field's schema name in the corresponding entity.

CRM queries can only be used when the result is an unambiguous value (many-to-one-relationship).

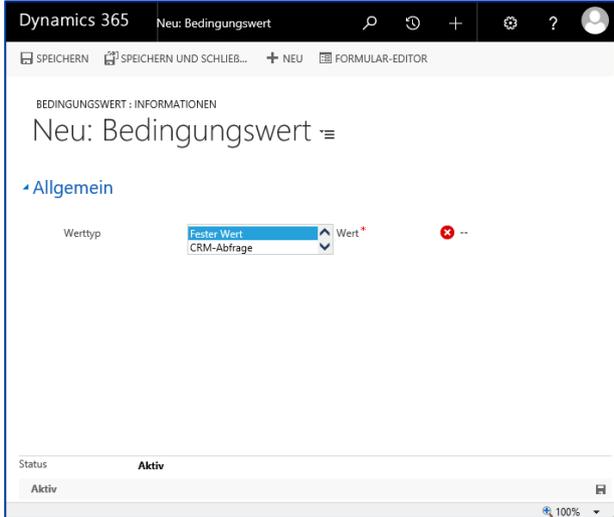
Values from linked entities are used to carry out the comparison (similar to adding tags, as described in the paragraphs below).

Example:

The condition is assigned with a meaningful name. Then, the operator is selected

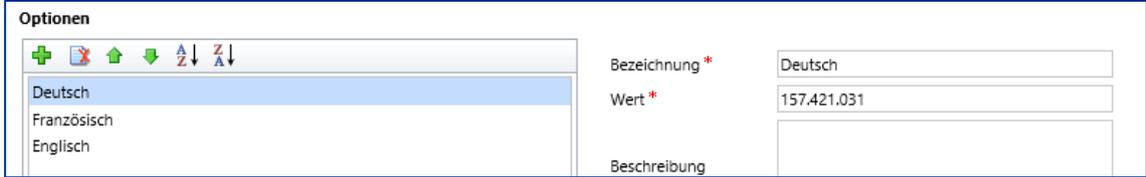


For simple value comparisons, a form as shown left opens. The values to be compared are entered.



The user can select between a “fixed value” and a “CRM query”.

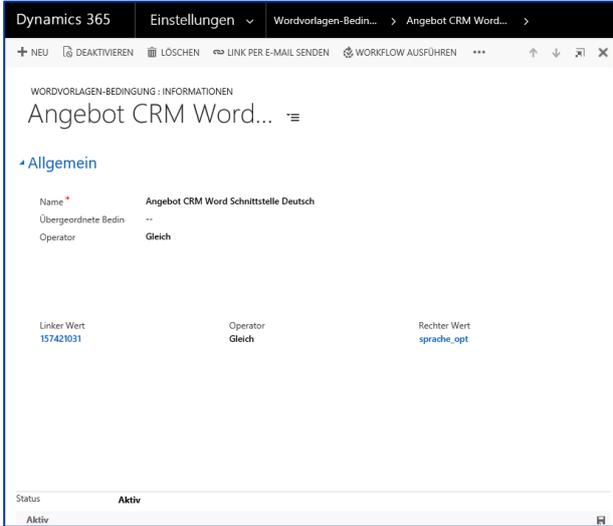
Fixed values are strings of characters referring unambiguously to a certain value. This includes numbers for the designation of values in option fields; record IDs of entities, etc.



Please note:

Entries are made without separators, here: 157421031.

A “CRM query” determines and compares the current value of a CRM field. For this example, the “language” field in the offer form was used.



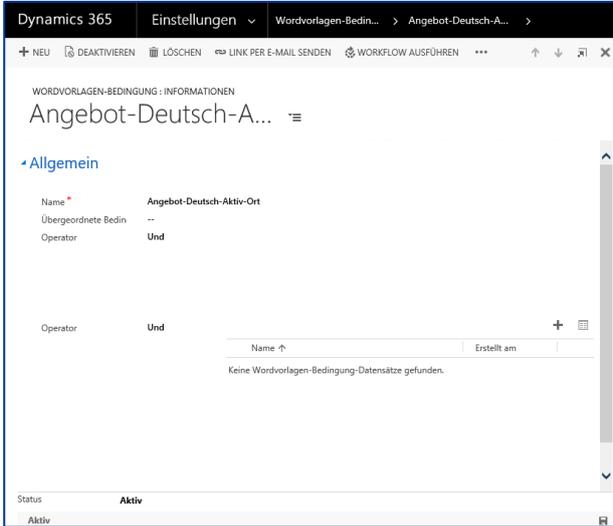
The complete value query is defined as shown left. As a result only quote templates with “German” as selected language in the quote, are displayed.

If the language was set in a linked record (e.g. company record), the query is carried out as follows (originating from the quote):

```
tag: customerid.account.language_opt
```

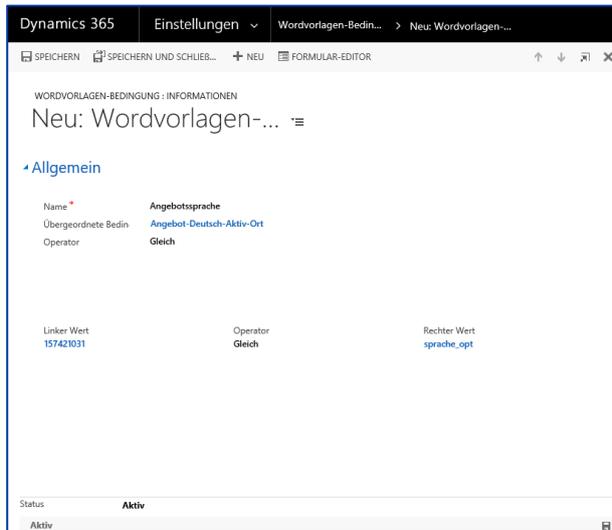
2.3.3 Grouping of multiple child conditions

It is possible to set groups of multiple child conditions. To that two given values can be compared or the presence or non-presence of a value can be checked. Every condition requires an operator that applies for the underlying link.



With help of a corresponding operator a parent condition is created.

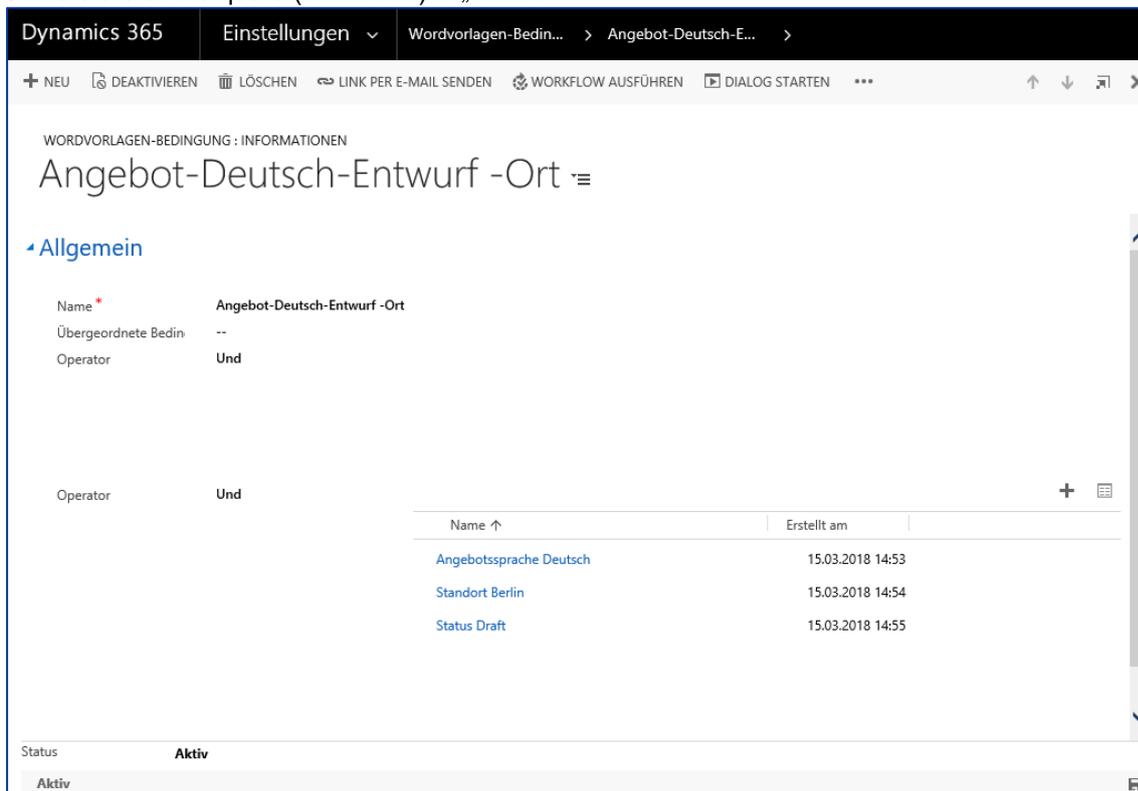
The usual CRM philosophy (+ sign on the right hand margin)



sets individual conditions as described above.

The following example shows the complete condition for a quote template, which will only be displayed if

1. the language is “German”, **and**
2. the location of recipient of the quote is Berlin, **and**
3. the state of the quote (statecode) is „Draft“.



When creating grouped condition it must be ensured that a set child condition is not the parent condition as well.

This would result in an error during the program sequence.

2.4 Deactivation of templates

The end user can only select active templates from the template explorer.

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

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

3 Creating a template

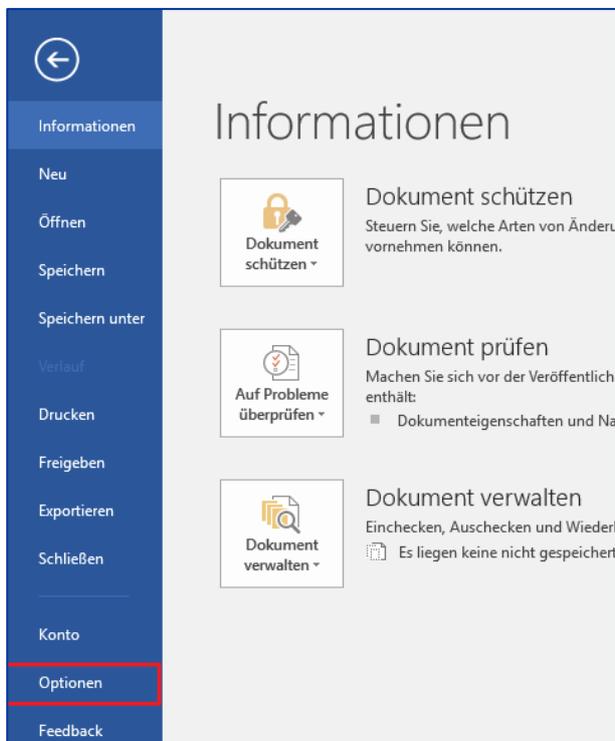
3.1 Requirements and basic knowledge

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.

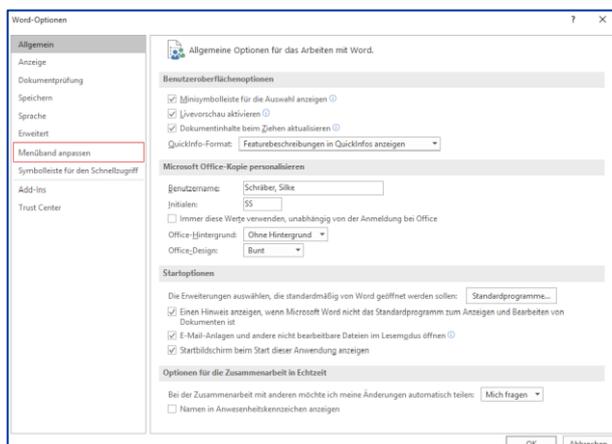
The CRM Word Interface templates can be created from [Microsoft Office 2007](#) upwards and have to be saved as **.docx** (not in compatibility mode), since the necessary content controls are only available under these requirements.

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

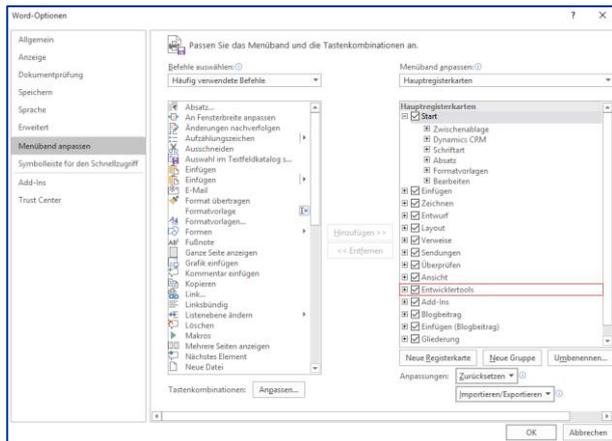
Example: Microsoft Office 2016



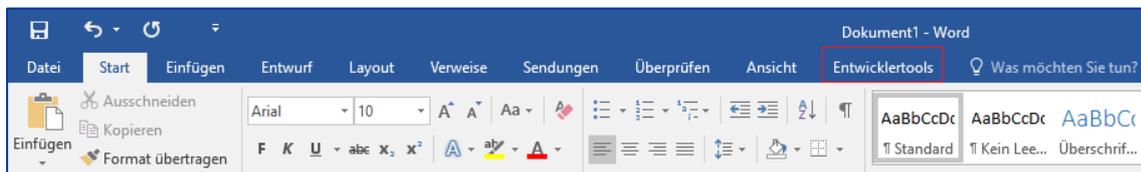
Open the “settings” via the “FILE” tab,



Click “customize ribbon”



Tick "Developer tools" and



the ribbon now includes the "Developer tools" tab.

Please note:

When using older versions of Microsoft Office (e.g. Office 2010), some differences in the functions described in this manual may occur. For instance, the character limit of 64 characters for tags does not exist in Microsoft Office 2016.

3.2 Preparation of the template

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



Schnittstellenverkäufer AG
 66000-SträÙe 100, D-01234 Microstadt

Firmenname
 Anrede Titel Vorname Nachname
 Straße
 PLZ Ort

Angebots-Nr.	Angebotsnummer	Bearbeiter:	Bearbeiter	Datum:	Datum
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Angebot

Sehr geehrte Damen und Herren,

aufgrund Ihrer Nachfrage möchten wir Ihnen nachfolgendes Angebot unterbreiten:

Pos	Menge	Bezeichnung	Einzelpreis netto	Gesamtpreis netto
1	1	Komponente	EK netto	Gesamt netto
		Inhalt		
Endsummen (netto)				Endsumme netto

Dieses Angebot besteht zuzüglich der geltenden Mehrwertsteuer und ist bis zum Datum gültig.
 Es gelten die Allgemeinen Geschäftsbedingungen der Schnittstellenverkäufer AG.

Mit freundlichen Grüßen
 Ihre Schnittstellenverkäufer AG

Included sample template for quotes.

(We work with Microsoft Office 2016).

3.3 Content controls

Positions, which later should show dynamic text, are selected by so called content controls. In order to define content controls, a title and a tag have to be created.

When setting the tags, please make sure that no fixed names are used within the tag. Names as “table” or “tablerow” should not be used.

A tag can contain a digit, but it must not start with a digit.

Periods and commas are separators within the tag

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.)

Information that is eventually output in your Word document can be retrieved from different entities.

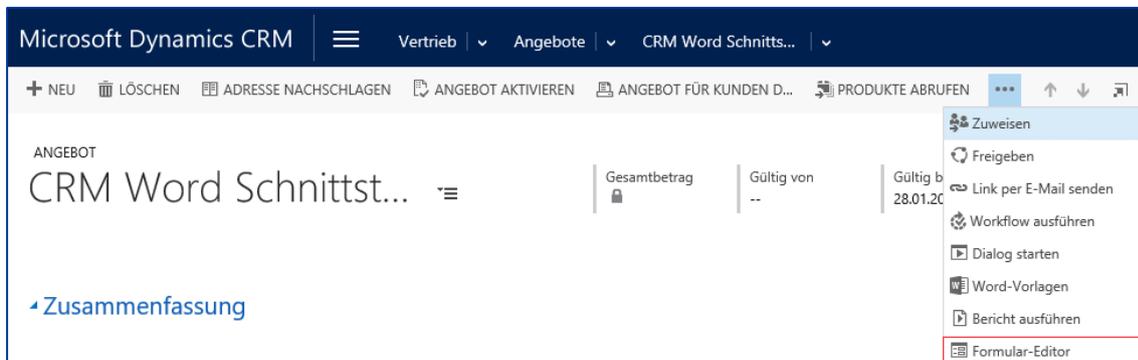
Example:

- 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.

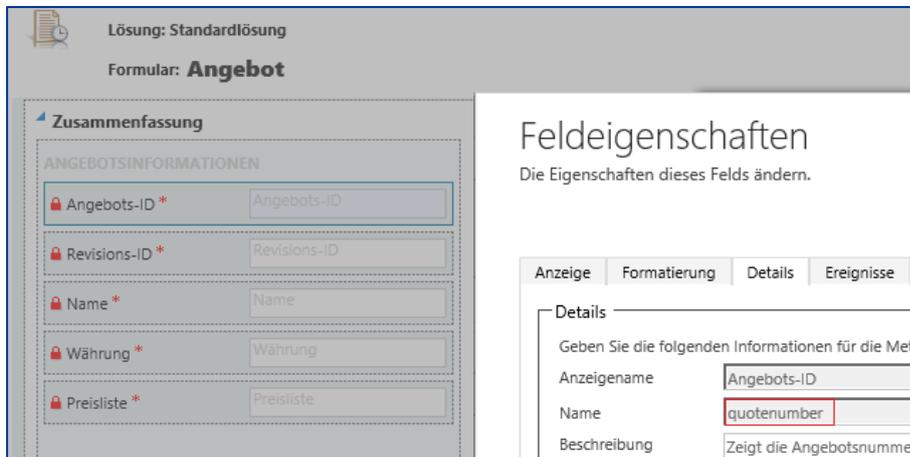
Through the links (relationships) of the entities with each other one can access any of these fields.

3.3.1 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 “QuotelD” field. The form editor is opened with the command bar in the “quote” entity.



The attribute is opened by double clicking. The “Details” tab shows the corresponding schema name.

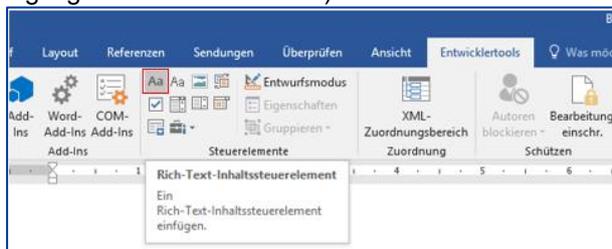


The schema name of the Quoteld (quotenumber) is “quotenumber”.

A string of characters (text) is inserted and completely highlighted at the place where the Word document will show the quote number.

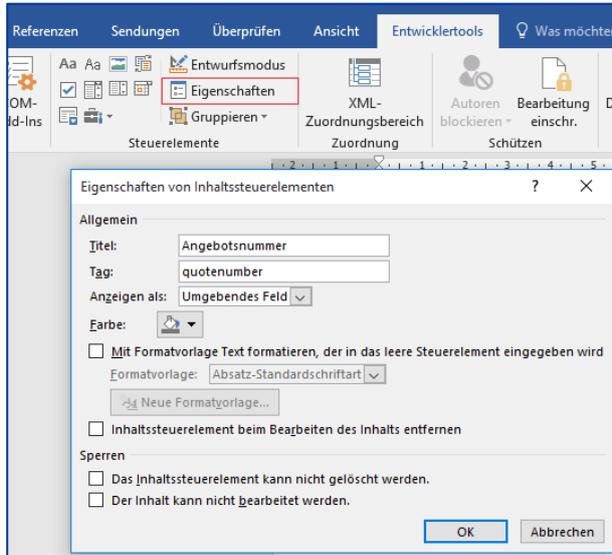


Go to the “Developer” tab and click on the “Rich Text Content Control” button. (Make sure that the text is still highlighted at this moment.)



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 with title and tag:

Title: a string of characters
here: quote number

Tag: schema name of the field
here: quotenumber

Now, the dynamic value for this field is set.

3.3.2 Simple linkings

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

Example:

company name

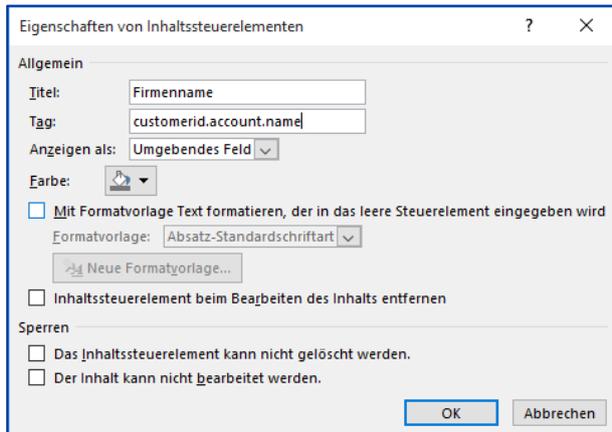
The linking between quote and company is made by the “Potential customer” field, where a record of the company is stored.

The schema name of this field is “customerid”.

The text stored in the Word document is marked as Rich Text Content Control and its settings are defined.

The company name tag assembles as follows:

Path description	Tag	Content
via the “Potential customer” field	customerid.	Schema name of the “Potential customer” field on quote
go to company	account.	Schema name entity “company”
and output the field “company name”	name	Schema name of the “company name” entity on “company” entity



Die Tag-Abschnitte werden durch Punkt voneinander getrennt.

Name: Firma

Tag: customerid.account.name.

verkürzte Schreibweise:

Tag: customerid.1.name

3.3.3 Multiple linkings

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

The quote form has no direct linking of fields between the “quote” entity and the “contact” entity. There is only a linking to the “company” entity, where the user can enter a “primary contact”. This linking is used to generate the Word template.

Path description	Tag	Content
Via the “potential customer” field	customerid.	Schema name of the “potential customer” field on quote
Go to the “company” entity	account.	Schema name entity “company”
Go to the “primary contact” field	primarycontactid	Schema name of the “primary contact” field of the entity “company”
Go to contact	contact	Schema name entity “contact”
Output the value of the “salutation” field.	salutation	Schema name of the “salutation” field

Tag for salutation: customerid.account.primarycontactid.contact.salutation
(abbreviated: customerid.1.primarycontactid.2.salutation)

Tag for first name: customerid.account.primarycontactid.contact.firstname
(abbreviated: customerid.1.primarycontactid.2.firstname)

Tag for last name: customerid.account.primarycontactid.contact.lastname
(abbreviated: customerid.1.primarycontactid.2.lastname).

3.3.4 Linkings of one-to-many relationships

In the Word template the user also needs to be able to access data from the entity “Quote (Product)” (also quote item).

The quote and the quote item are related by a one-to-many relationship. Since the user works within the quote, the name of this entity **may** be dropped. In our example, this is the quote (quote). From the quote you reach the “Quote (product)” entity (quotedetail) by the one-to-many relationship (quoteid).

The form of this entity contains fields, from which information should be 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	Menge	Bezeichnung	Einzelpreis netto	Gesamtpreis netto
1	1	Komponente	VK netto	Gesamt netto
		Inhalt		
Endsummen (netto)				Summe

Please note:

A more detailed description on how to work with tables can be found in the following section “tables”. Inserting content field into the table is independent from creating the table itself.

The tag for the product position is defined as follows:

Path description	Tag	Content
We work within the quote	quote	Schema name quote
Via the one-to-many relationship to the “quote (product)” entity	quoteid	Schema name of the linking
Go to the quote (product) entity	quotedetail	Schema name of the quote (product) entity
To the item number field	lineitemnumber	Schema name of the „item number“ field“

Tag: quoteid.quotedetail.lineitemnumber

Please note:

In the CRM, 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 of 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: quoteid.quotedetail.description

If the “component” field is filled with a product from the product catalogue, the data will be read via the linking of the product.

Example:

Tag: quoteid.quotedetail.productid.product.name

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

3.3.5 Editor (current user)

In order to output the current executing editor (user) in the Word template, please use the following tag:

Tag: currentuser.lastname

3.3.6 Owner

In order to output the owner of the record, please use the following tag:

Path description	Tag	Content
Via the “owner” field to the user record	ownerid	Schema name of the linking
Go to the user record	systemuser	Schema name entity “user”
Output the user’s last name	lastname	Schema name of the “last name” field

Tag: ownerid.systemuser.lastname

3.4 Tables

3.4.1 Tables (in general)

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 is given out in the following rows according to the description in the header and contains dynamic values.

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

The quote (or order or invoice) should output the items one after the other, wherein header and footer remain unchanged.

At first, all necessary field contents of the table are defined as Rich Text content control elements and the corresponding tags are set.

Afterwards, **every table row** which contains dynamic values of item information and can be output several times is highlighted.

The entire row has to be defined as Rich text content control element. Set the tag for the entire row as follows:



The compulsory title of a table row is always tablerow

Title: tablerow
Tag: true

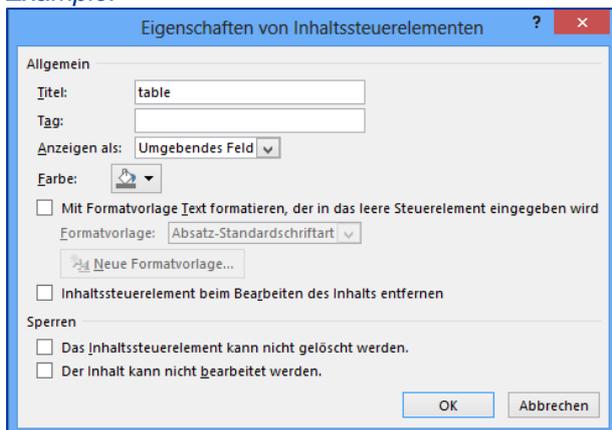
If the condition is set “true”, this row will always be output.

Pos	Menge	Bezeichnung	Einzelpreis netto	Gesamtpreis netto
1	1	Komponente	EK netto	Gesamt netto
	Inhalt			
Endsummen (netto)				Endsumme netto

Then, define the entire table as Rich text content control element and set the tag for the table as follows:

Title: The compulsory title of a table is always “table”
Tag: No tag is set.

Example:



Please note:

If the tag field remains empty, the title set (in this example “table”) will automatically be copied in the tag field (Word function) after saving. This has no effect on the interface’s functionality.

Please note: At first, set all tags in the table. Then, set the tablerow tag for rows with dynamic values (which should be repeated within the table).

Do not set the table tag, until all tags necessary for the table were set.

Any changes and/or additions to the tags that may be necessary after setting the table tag may result in shifting or deleting tags so that errors may occur during the output process. In this context it helps to display the document in draft mode via the “delveloper tools” tab. If tags (or parts of it) were deleted, malfunctions and errors may occur despite adjustment. In this case, we recommend recreating the complete table.

3.4.2 Sorting the table items

A table can be sorted by specific criteria. This is set in the table-tag.

Example:

Item number of the quote item
The table-tag specifies the entity (quotedetail) containing the field as well as the field name (lineitemnumber).

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

Title: table
Tag: 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: quotedetail.lineitemnumber-desc

3.4.3 Multiple sorting criteria

When the table should be sorted by multiple sorting criteria, enter them continuously and separated by a comma. The sorting order is important.

Sorting order: Menge, Beschreibung, Position
Tag: quotedetail.quantity,quotedetail.description,quotedetail.lineitemnumber

Pos	Menge	Bezeichnung
3	1	CRM TAPI Schnittstelle
	a	
1	1	kleine Lizenz
	k	
3	1	CRM DATEV Schnittstelle
	s	
1	4	CRM SharePoint Schnittstelle
	m	
2	5	Große Lizenz
	a	
2	8	Mittlere Lizenz
	a	
3	9	CRM Word Schnittstelle
	a	

First instance:
Sorting by field content „quantity“. Table rows with the same value are listed randomly.

Second instance:
The table rows with the same quantity value are sorted in alphabetical order by the field content of the description.

Third instance:
Does not apply, since all table rows were sorted after the second instance.

Sorting order: item, quantity, description
Tag: quotedetail.lineitemnumber,quotedetail.quantity,quotedetail.description

Pos	Menge	Bezeichnung
1	1	kleine Lizenz
		k
1	4	CRM SharePoint Schnittstelle
		m
2	5	Große Lizenz
		a
2	8	Mittlere Lizenz
		a
3	1	CRM TAPI Schnittstelle
		a
3	1	CRM DATEV Schnittstelle
		s
3	9	CRM Word Schnittstelle
		a

First instance:

Sorting by field content “item”. Table rows with the same value are listed randomly.

Second instance:

The table rows with the same value of the “item” field are sorted by the field “quantity”.

Third instance:

The table rows with the same values of the fields “item” and “quantity” are sorted in alphabetical order by the field content of the description.

When the table is sorted by empty fields, they will be grouped randomly in the first rows of the table.

3.4.4 Tablerow tag

In order to prevent changes in the created Word documents which occur again and again, tags with specific conditions were developed.

If the fields to be retrieved are **part of a table**, this process will be controlled by the tablerow tag.

Sometimes the fields to be retrieved are empty, which results in unwanted blanks and blank lines in the Word document. The user would have to correct this manually.

In order to prevent such blanks and blank 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 CRM Word interface gives out a blank line, which may have to be deleted manually.

Pos	Menge	Bezeichnung	Einzelpreis netto	Gesamtpreis netto
1	1,00	Word-Schnittstelle für Microsoft Dynamics CRM	960,00 €	960,00 €
				
2	1,00	Softwarepflege zur Word-Schnittstelle für Microsoft Dynamics CRM	317,00 €	317,00 €
		Die Softwarepflege gewährleistet Ihnen die Upgrade-Sicherheit bei zukünftigen Versionen und gilt 2 Jahre. Gültigkeit:		
Endsummen (netto)				1.277,00 €

With the tablerow tag, the user can define one or multiple conditions for each row of a table in order to show or hide this row.

The table is generated and filled with the tags for the single columns and rows (quantity, components, purchase prices etc.).

Subsequently, every row containing dynamic content is highlighted and defined.

In our example, this applies for the table rows 2 and 3.

Row 2 should always be displayed. Select this row and define it as Rich text content control element as follows:

Title: tablerow
Tag: true

The value “true” defines a condition which is always true. This row will thus always be shown.

The third table row is selected and defined as Rich text control element as follows:

Title: tablerow
Tag: quoteid.quotedetail.description notnull

The CRM Word interface will show the third table row only if the “content” field contains information.

When every row was defined accordingly, **the last step** is to include the table tag, as described above.

Pos	Menge	Bezeichnung	Einzelpreis netto	Gesamtpreis netto
1	1	Komponente	EK netto	Gesamt netto
Inhalt				
Endsummen (netto)				Endsumme netto

Please note:

Please consider the correct order for using tags in tables: first define the tags *in the table fields*, then the *table row tags* for the corresponding rows and *at last* the table tag. When making changes or additions to the existing tables, control elements may be deleted or shifted accidentally. This may result in error messages in the Word documents. Sometimes it may be necessary to recreate complete tables.

The tablerow tag always consists of three parts, separated from each other by blanks:

- the field to be checked in the row (quotedetail.quantity)
- the operator (e.g. !=) and
- 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

The set condition “quotedetail.quantity != 1” can, for instance, define a row, which will only be shown if the value set for the quantity in the quote item is unequal 1.

Please note:

Always enter blanks before and after the operators. Without these blanks error messages may occur or the interface will ignore the condition.

Multiple conditions are separated by a comma (without blanks).

3.5 Date, Time and Guid

The CRM Word interface can insert the date or/and the document's GUID with a predetermined format in the Word document to be created

Example:

current date:

Title: date

Tag: newdate

(The current date and time [hour:minute:second] are output.)

date:	30.08.2013 17:00:16
-------	---------------------

Various additional tags can optimize the output of the date. These additional tags are separated from the actual tag by a comma.

Format specifications	Tag	Output in the text
yyyy-MM-dd	newdate,date_iso	2011-08-30
yyyy-MM-dd	newdate,date_de	30.08.2013
yyyy-MM-dd	newdate,date	30.08.2013
yyyy-MM-dd	newdate,date_short:	30.08.2013
Day of the week, dd. month name yyyy	newdate,date_long	Friday, 30. August 2013
mm/dd/yyyy	newdate,date_us:	08/30/2013
yyyy-dd-mm	newdate,date_uk	2013-30-08

Please note:

The additional tags date_short and date_long use the CRM format settings as well as the user's language.

The current time is retrieved by

Tag: newdate,time

time:	17:02
-------	-------

The random GUID is retrieved by

Tag: newguid

Guid:	9fa018ea-d5a8-44b8-ae7a-823ddae3fb4e
-------	--------------------------------------

This generates a new Guid, which is not related to the data from the CRM system

3.6 Additional tags

3.6.1 ,blank and ,newline

The additional tag

,blank	generates a blank after the dynamic value
,newline	generates a line break after the dynamic value.

`.newline2` generates two line breaks after the dynamic value
Using these tags prevent unnecessary blank lines and blank spaces in the Word templates.

Example: address field

We recommend defining the fields of the address field in a row by using the additional tags “blank” resp. “newline”. The address field of our sample quote looks as follows in the Word template:

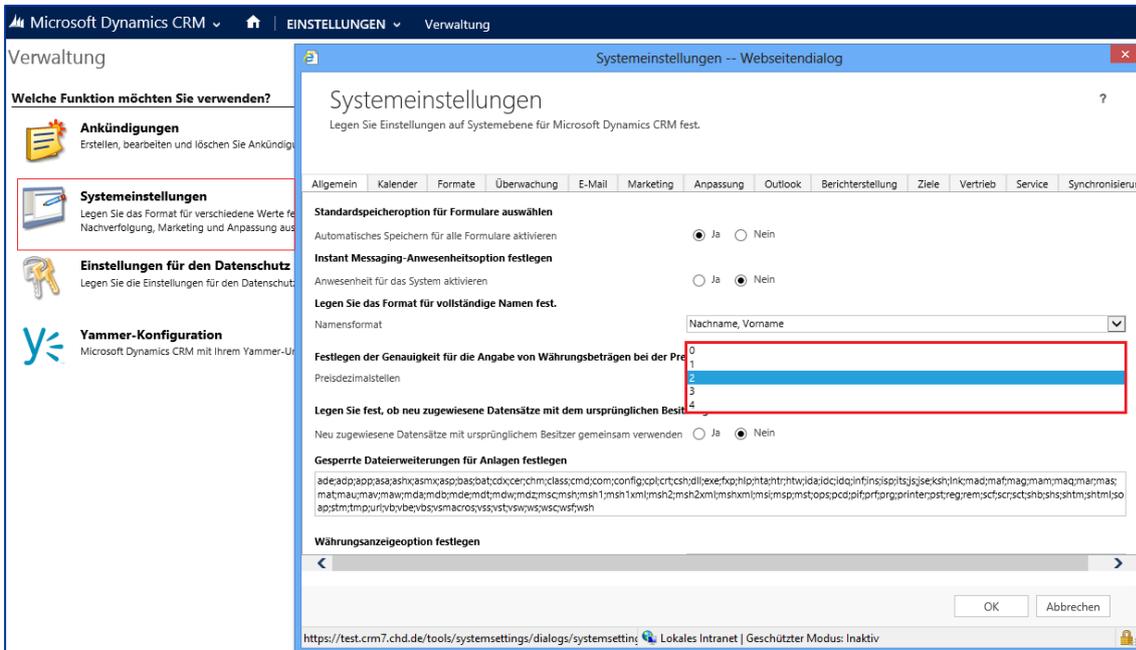


The corresponding tags are defined as follows:

Company name:	customerid.1.name,newline
Salutation of primary contact:	customerid.1.primarycontactid.2.salutation,blank
Sufix of primary contact:	customerid.1.primarycontactid.2.suffix,blank
First name of primary contact:	customerid.1.primarycontactid.2.firstname,blank
Last name of primary contact:	customerid.1.primarycontactid.2.lastname,newline2
Street (company):	customerid.1.address1_line1,newline2
Postal code (company):	customerid.1.address1_postalcode,blank
City (company):	customerid.1.address1_city

3.6.2 `.round`

The CRM system can calculate with up to four decimal places. The setting of the decimal places can be adjusted in the “Settings” area, via the “Administration” navigation button, under “System Settings”.



Usually, we round to two decimal places.
Thereto, insert the additional tag “round” at the end of the corresponding tag, separated by a comma.
The output is **automatically** rounded to two decimal places.

Tag: `quote.quoteid.quotedetail.priceperunit,round`.

Output without additional tag:

Einzelpreis netto
1.000,1234 €

Output with additional tag "round"

Einzelpreis netto
1.000,12 €

If the amount should be rounded to any other number of decimal places, just add the according number of decimal places in digits.

Example: `quote.quoteid.quotedetail.priceperunit,round3`.

Output with additional tag "round3":

Einzelpreis netto
1.000,123 €

3.6.3 `,noformat`

The additional tag "noformat" does not retrieve the content of the CRM fields, but the values set in the database. Therefore, add the additional tag "noformat" to the existing tag after the comma.

By adding the additional tag "noformat" to the fields set as "option set" types, the value set in the selected option is output.

Example: entity quote (quote), option set set "payment terms" (paymenttermscode)

Tag	Output in the document
paymenttermscode	10 days 2%, net 30 days
paymenttermscode,noformat	2

For Lookup-type fields, adding the additional tag “noformat” will output the ID of the selected record.

Example:
entity order (salesorder), Lookup field “quote”

Tag	Output in the document
quoteid	Sale CRM Word interface (name of the quote)
quoteid,noformat	ea48aa08-9395-e811-812e-00155d00f36f

For currency-type fields, adding the additional tag “noformat” will output the currency amount as digit.

Please note:

In doing so, the organization-wide setting within the CRM system (via *settings* → *System settings* → *paragraph* “Setting the accuracy for currency amounts for the price calculation in the system”) is ignored.

Example:

entity quote (quote), field total amount (totalamount)

Tag	Output
totalamount	9.617,00 €
totalamount,noformat	9617.0000

3.6.4 „replace“

The additional tag “replace” replaces information or sub-information from fields of the CRM system, e.g. for uniquely formulated records.

Example:

Name of the quote

As name of the quote (schema name: name) was set:

CRM Word Interface, 2019

3.6.4.1 Output of free text

The word document should output the following text as name:

CRM Word Interface, year 2019

This can happen by using the additional tag “replace”:

The additional tag “replace” is added to the schema name of the field to retrieved, but only after setting the comma (without spaces).

Now, enter the information to be replaced, written in apostrophe and without spaces.

Separated by the pipe symbol “|”, please give the information to be output instead of the original text.

Tag: name,replace:'2019'|year 2019'

Important: If the part, which should be replaced, is **not** content of the retrieved tag, the CRM word interface will retrieve the content of the field as usual.

3.6.4.2 Retrieving information from a different field of the CRM system

In this case, enter the information without apostrophes.

Tag: name,replace:'2019'|fieldname

Example: Name of the quote, in which a sub-information should be replaced by the name of the sales opportunity.

Tag: name,replace:'2019'|opportunityid.opportunity.name

Important: It is not possible to combine the replacement of free text ([3.6.4.1](#)) and information of CRM fields ([3.6.4.2](#))

3.6.4.3 Using the additional tag “replace” in combination with the property tag and FileName

Property-Tag and/or FileName are set with the input mask

<PropertyTag Title='Titel' Tag='schemaname' />

(This already has apostrophes).

The apostrophes in the input mask are replaced by quotation marks when also using the additional tag “replace”, in order to set the replacement of a sub-information.

Without additional tag:

```
<PropertyTag Title='Name' Tag='name' />
```

With additional tag:

```
<PropertyTag Title="Name" Tag="name,replace:'2019'|'Jahrgang 2019'" />
```

(The ends with an apostrophe and quotation marks.)

3.7 format-Tag

The tag “format” enables the user to format the Word document in accordance with the specifications of the Microsoft “Composite Formatting”.

[http://msdn.microsoft.com/en-us/library/txafckwd\(v=vs.110\).aspx](http://msdn.microsoft.com/en-us/library/txafckwd(v=vs.110).aspx)

Therewith, data of numeric fields, date fields and text can be output in Word templates in the correct format (for example customary dates and times or currency information, fractional parts and customary separation of digits in thousands).

This additional tag is inserted after the field name to be retrieved, separated by a comma. According to the format specifications specified by Microsoft, place holders and the corresponding definitions are used. Every tag will output only one value, therefore only one placeholder (“{0}”) can be used.

Formatting always depends on the current user’s language, unless another language is set for the Word document.

3.7.1 Date

Beispiel:

description	Tag	Output in the text
Regular with time	Createdon	17.07.2014 15:31
seconds	createdon,format:{0:%s}	8
With day of the week	createdon,format:{0:D}	Donnerstag, 17. Juli 2014
With hyphen	createdon,format:{0:dd-MM-yyyy}	17-07-2014
US-American date format	createdon,format:{0:MMMM dd, yyyy}	July 17, 2014
Long US-American date format	createdon,format:{0:MMMM „the“ d „th,“ yyyy}	July the 17th, 2014

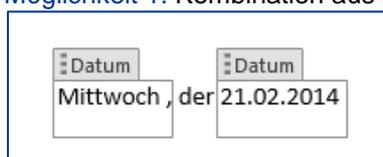
Please note:

Only if an English CRM is used or the Word template’s language is set to “English”, the US-American date format will be output as shown in the table above.

The tags for the long date format can be combined in various ways:

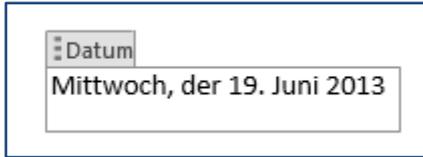
Example: Monday, February 17th 2014

Möglichkeit 1: Kombination aus zwei Tags:



Tag 1: createdon,format:{0:dddd}
Text in the template: the
Tag 2: newdate,date_de

Possibility 2: one Tag:



Tag: createdon,format:{0:dddd}, der {0:dd. MMMM yyyy}

3.7.2 Number and currency fields

The Microsoft formatting can also apply for number and currency fields.

Example:

The standard fields “quantity”, “Price per unit” and “total amount” are retrieved by the following tags:

Quantity: quoteid.quotedetail.quantity
 Price per unit: quoteid.quotedetail.priceperunit
 Total amount: totalamount

Output **without** the additional tag “round”:

Quantity	Price per unit	Total price
1,000.00000	1,277.00 €	1,277,000.00 €

Here, the five fractional digits are retrieved from the default definition of “quantity” entity of the Microsoft Dynamics CRM.

If no decimal places are output in the Word document, the format tag will help:

Quantity: quoteid.quotedetail.quantity,round0
 Price: quoteid.quotedetail.priceperunit,format:{0:#,###,###}
 Total amount: totalamount,format:{0:#,###,###}

Quantity	Price per unit in €	Total amount in €
1000	1277	1.277.000

Please note:

When using the format tag ,the currency output in the currency field is not carried out automatically. The currency can be either stated in the table header or retrieved separately.

Setting the following tags defines the amount of zeros after the point and the formatting of the thousands:

Quantity: quoteid.quotedetail.quantity,format:{0:#,###,###.00}
 Price: quoteid.quotedetail.priceperunit,format:{0:#,###,###.00}
 Total amount: totalamount,format:{0:#,###,###.00}

Quantity	Price per unit in €	Total amount in €
1,000.00	1,277.00	1,277,000.00

Please note:

According to the Microsoft “Composite Formatting”, commas are used as group separators and a period is used as decimal separator.

Incorrect definitions as for example

Quantity: quoteid.quotedetail.quantity,format:{0:#,###.###.00}
 Price: quoteid.quotedetail.priceperunit,format:{0:#,###.###.00}
 Total amount: totalamount,format:{0:#,###.###.00}

may result in confusing output in the document:

Quantity	Price per unit in €	Total amount in €
1.000,00000	1.277,00000	1.277.000,00000

3.7.3 Text

With the format tag, it is possible to output additional information in the Word document. Here, additional information means information which is not included in the CRM.

The information retrieved from the fields of the CRM need placeholders.

Example:

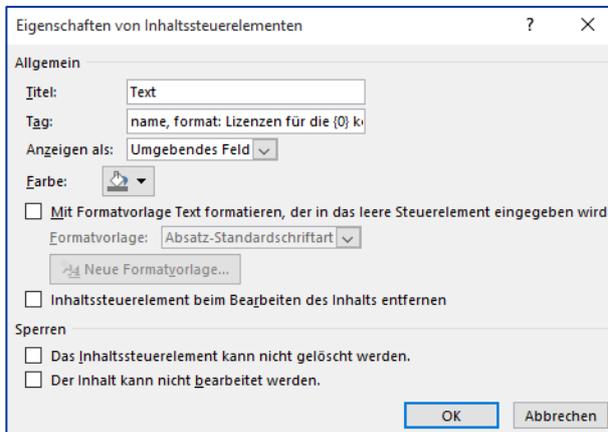
The quote should output not only the quote's name, but also additional information not included in the CRM. The name of the quote is "CRM Word Interface".

The complete sentence in the Word document should read as follows:

"Licenses for the **CRM Word Interface** cannot be returned."

The place, where the text is to be inserted, is marked with a Rich text content control element and defined as follows. It is important to specify the placeholder for the quote's name with braces and content 0 {0}.

Additional information **must not** contain commas.



Titel: Text
 Tag: name,format: Lizenzen für die {0} cannot be returned.

3.7.4 Guid

Description	Retrieving the offer guid (normal)
Tag	quoteid
Output in the document	30e2fed1-d41b-e811-8116-00155d00f36f

description	32 digits
Tag	quoteid,format:{0:N}
Output in the document	30e2fed1d41be811811600155d00f36f

description	32 digits, separated by a hyphen
Tag	quoteid,format:{0:D}
Output in the document	30e2fed1-d41b-e811-8116-00155d00f36f

Description	32 digits, separated by a hyphen, in curly braces
Tag	quoteid,format:{0:B}
Output in the document	{30e2fed1-d41b-e811-8116-00155d00f36f}

description	32 digits, separated by a hyphen, in simple brackets
Tag	quoteid,format:{0:P}
Output in the document	(30e2fed1-d41b-e811-8116-00155d00f36f)

description	Four hexadecimal values in brackets. The fourth value is a subset of eight hexadecimal values, also in brackets.
Tag	quoteid,format:{0:X}
Output in the document	{0x30e2fed1,0xd41b,0xe811,{0x81,0x16,0x00,0x15,0x5d,0x00,0xf3,0x6f}}

3.8 condition tag

Analogous to the tablerow tag, the condition tag is used to show or hide within text. This tag makes it possible to attach outputs in continuous text to precisely defined conditions.

The operators for the definition of condition tag are:

„ > “	greater than
„ < “	less than
„ = “	equal
„ != “	unequal
nonnull	contains a value
isnull	contains no value

Example: Salutation in the quote.

The quote should be addressed to the person who commissions the creation of the quote. In the majority of cases, this will be the person set as primary contact in the customer's record. The information of the general salutation can, just as well as in the address field, be taken from the primary contact record. If, however, no primary contact is set or if the primary contact is unknown, the output in the CRM Word Interface will be as stated below:

Sehr geehrte/r
aufgrund Ihrer Nachfrage möchten wir Ihnen nachfolgendes Angebot unterbreiten:

There are three possibilities for the salutation in the Word document:

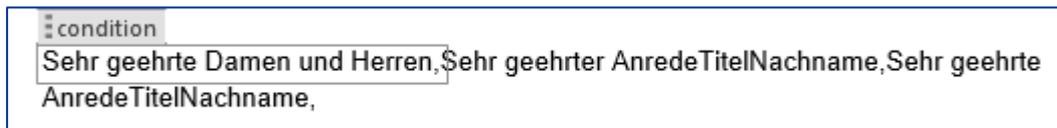
Sehr geehrte Damen und Herren,Sehr geehrter AnredeTitelNachname,Sehr geehrte AnredeTitelNachname,

(In order to prevent unnecessary blanks in the Word document, blanks must not be included between the salutations.)

The tags for the salutation, title and last name are set in the different versions of the salutation. The complete salutation (Dear Sir or madam,) is marked as Rich Text content control element and contains the following definitions:

Title: condition
Tag: customerid.account.primarycontactid isnull

The tag refers to the primary contact field in the company record. When this field is not filled (isnull), the general salutation will be output in the Word document. Here, it is important to include the comma after the salutation in the Rich text content control element, otherwise this part may have to be changed manually.



The second version of the salutation (Dear Mr. TitleLastname,) is marked as Rich text content control element and defined as follows:

Title: condition
Tag: customerid.1.primarycontactid.2.salutation = Mr.

The link to the condition, to which this output is attached, is the salutation in the stored contact.

The third version of the salutation is done the same:

Title: condition
Tag: customerid.1.primarycontactid.2.salutation = Ms.

Please note:

When setting the tags, always consider that the condition has to be attached to a field (not to an entity)!

The

Tag: "customerid.account.primarycontactid.contact notnull"
would result in an error message.

Similar to the tablerow tag, the first step is to set the tags of the single fields. The last step is to set the condition tag around these tags (setting the tags from inside outwards).

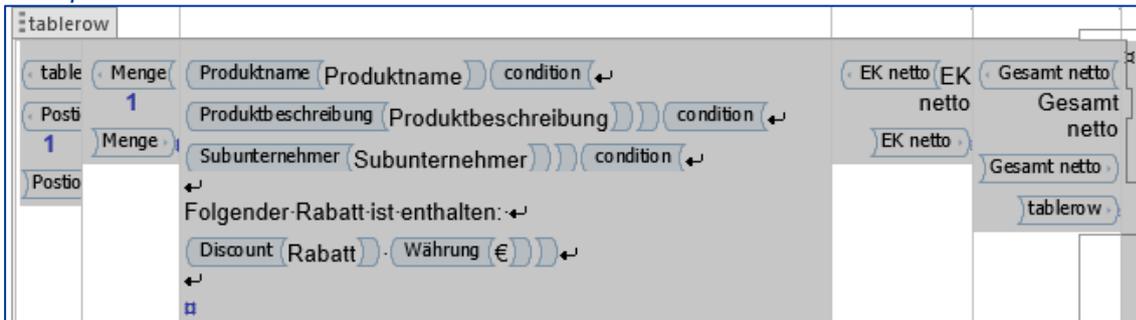
Example:

Many customers add their individual order number for the placed order with the contract award. This order number has always to be stated in the continuing process, for that the customer can assign this process in their own system.

With the condition tag, a corresponding field or lines or even complete text passages can be set and will only be output, if a certain field in the CRM system is filled appropriately or contains a specified entry.

Furthermore, it is possible to show or hide single passages of table rows resp. texts by using the condition tag.

Example:



If the text section to be shown or hidden are leaded or followed by blank lines, those blank lines should be included in the tag by a soft return (keyboard shortcut shift + Enter). Multiple conditions are separated by a comma (without blanks).

It is not possible to hide or show single table columns.

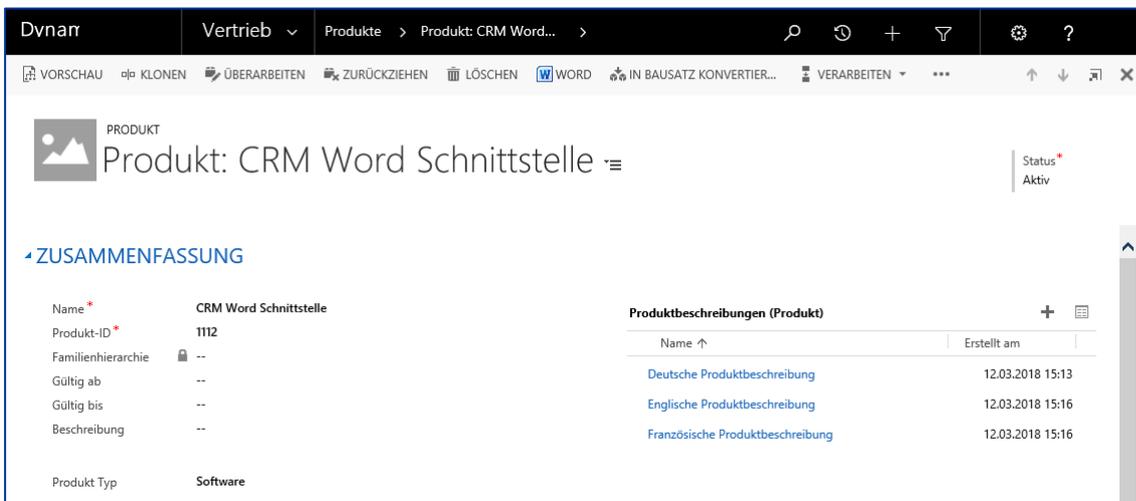
3.9 Filters

Filters are used to output only records with certain features from a larger range of records.

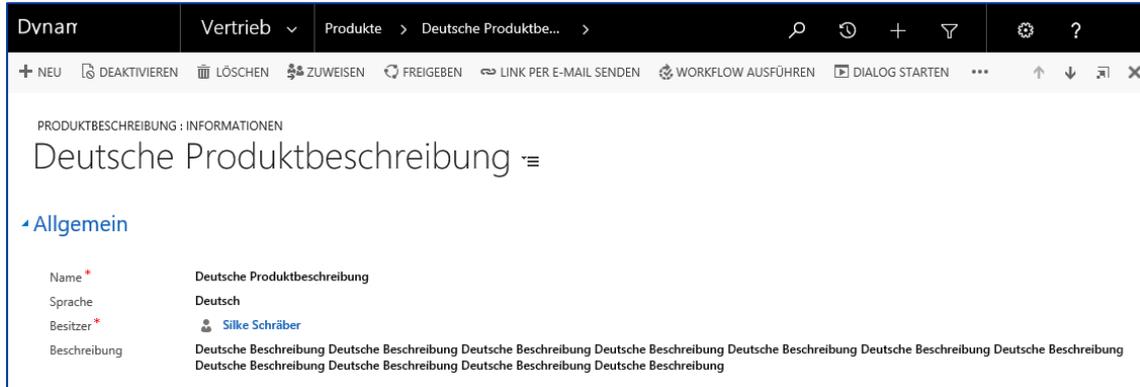
Example:

Documents are created in various languages; therefore it is necessary to select the product description in the corresponding language.

A new entity “product description” (productdescription) is created. The “product” entity is attached to the “product description” entity by a one-to-many-relationship (productid).



The form of the “product description” entity contains the set of options “language” (language_opt) and the field “description” (description) from which the content is to be retrieved.



The set of options has the following values:

German language	157.421.031
English language	157.421.033 and
French language	157.421.036.

A template is created for each language. To do so, the product description should be output in the corresponding language.

The
Tag: productid.productdescription.description
 Displays the product descriptions of **all** stored languages.

In the “language” field, the output can be filtered.

The path leads from the “product” entity via the relationship to the “product description” entity. Now, enter the filter (without blanks) in brackets. The filter displays the field’s schema name, which is used to filter by comparing it (==) with the value stored in the set of options). The value of the set of options is written between primes (**no apostrophe**).

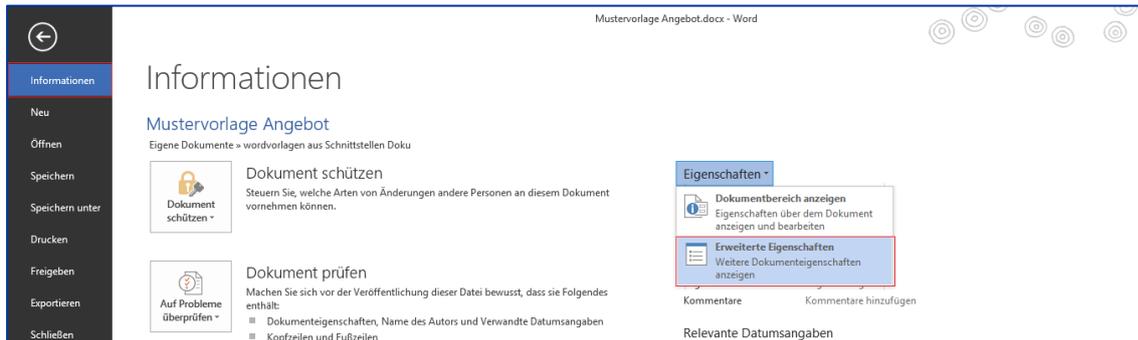
The field, from which the content is to be retrieved, appears at the end of the tag.

Tag: productid.productdescription[language_opt=='157421031'].description

Please note: The filter itself must not contain blanks.

3.10 Extended Properties

Extended properties can be defined for every document, with a distinction between document properties and extended properties. You can find the extended properties in the Word template in the “file” tab, then go to the “information” sitemap and click “Properties”.



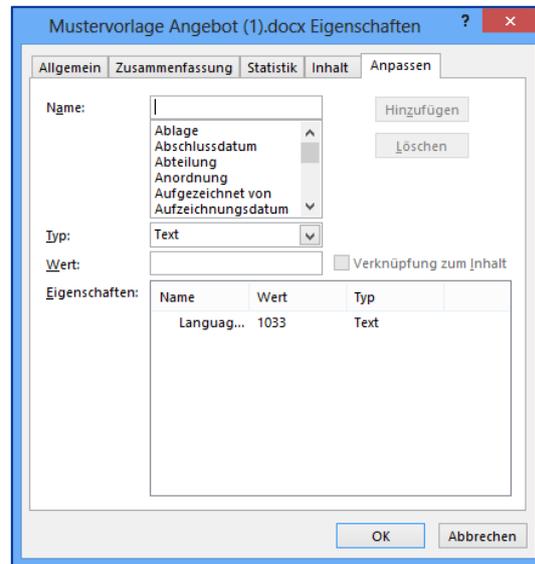
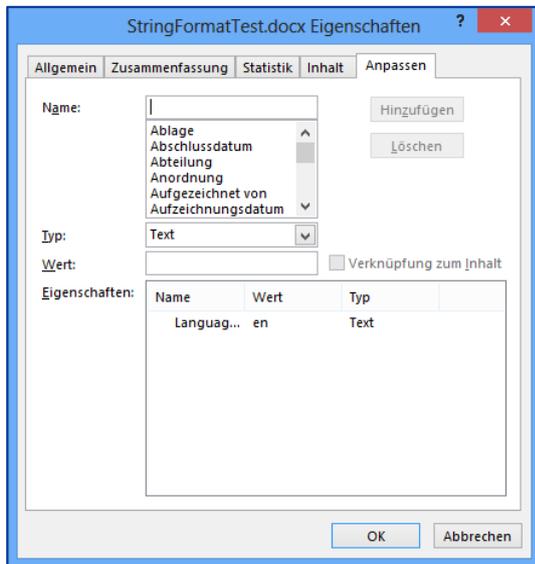
3.10.1 Definition of language

Word templates can be defined specifically for different languages. If this definition is not carried out, the output of the tags (e.g. format tag) is taken place in the language of the current user.

The definition of language is done in the “extended properties” of the Word document, via the “Customize” tab.

As a name, enter LanguageCode.

As value, enter either the given numeric code (e.g. 1031 for German / 1033 for English) or with letter coded (e.g. de for German, en for English).



The definition of language is necessary, for example, for date specifications

Example:

Using the format tag and setting the tag createdon,format:{0:D}, the output with the current user language (German) looks as follows:
Dienstag, 17. März 2015.

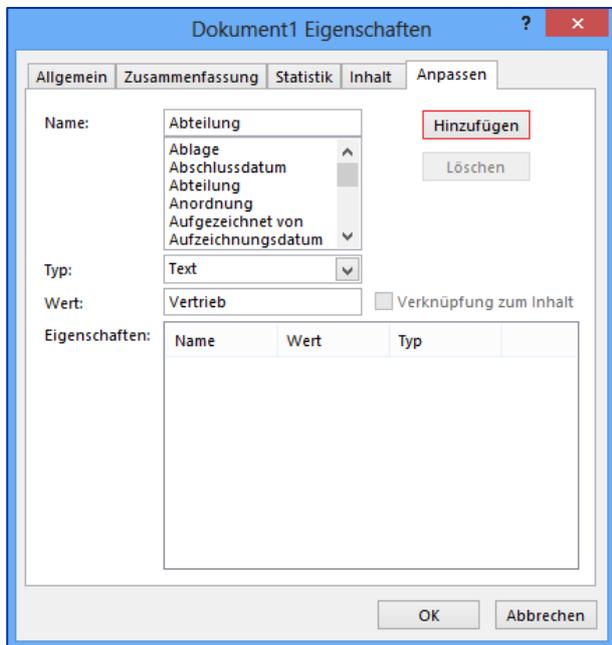
If, however, the Word document's language was defined as English, the date output will look as follows:
Tuesday, March 17, 2015.

3.10.2 Property Tag

The extended properties can be complemented by the property tag in the "Customize" tab.

Example:

All Word documents created with this template should be provided with the additional "extended property" "distribution" department.

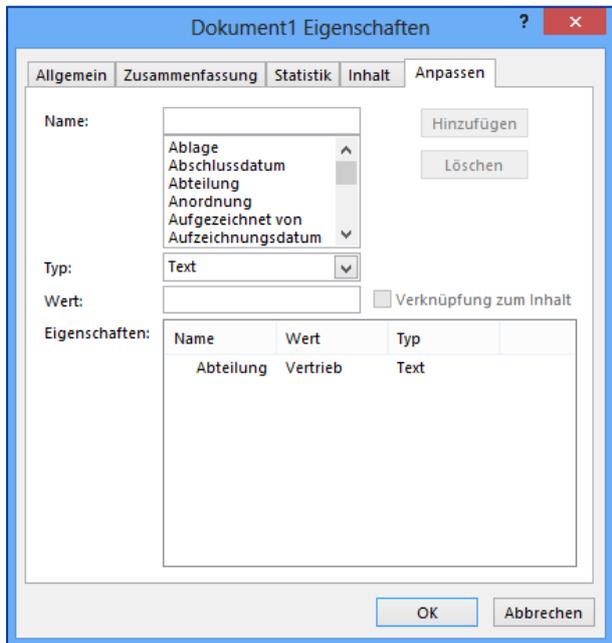


The following information is necessary:

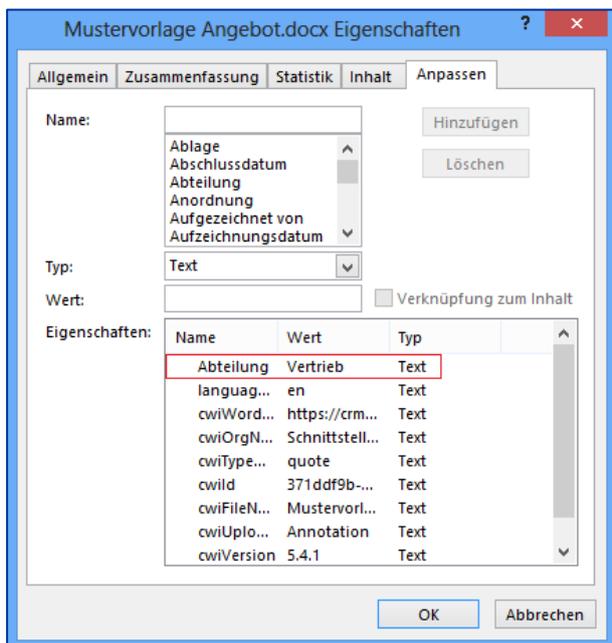
Name: Department

Value: Distribution

Clicking the „Add“ button finishes this definition.



All documents created with this Word template are provided with the additional property “distribution” department.



This information is independent from the content of the Word document. It is only for the distinction of the single documents and sharing “hidden” information used to internally assign the document within a company.

(All other extended properties listed here were generated by the CRM Word Interface.)

Content of CRM fields can be transferred as “hidden properties”. This happens by using the template:

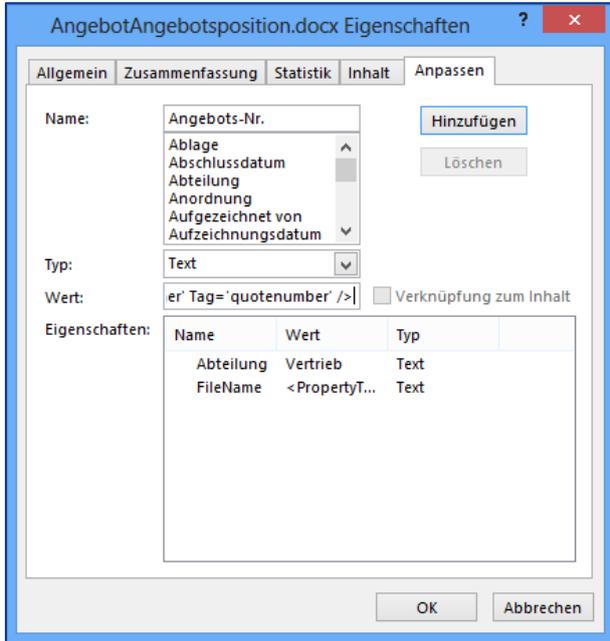
<PropertyTag Title='Name' Tag='name' />.

Thereby, information on the template is defined as in the Word template itself.

Example:

The quote number is to be transferred as hidden property.

Tag: `<PropertyTag Title='quotenumber' Tag='quotenumber' />`



Name: Name for this definition
Value: `<PropertyTag Title='quotenumber' Tag='quotenumber' />`

3.10.3 FileName

With the “FileName” property, the user can automatically name the document created by the CRM Word Interface.

Without an explicit definition, the document created by the CRM Word Interface is automatically named after the Word template.

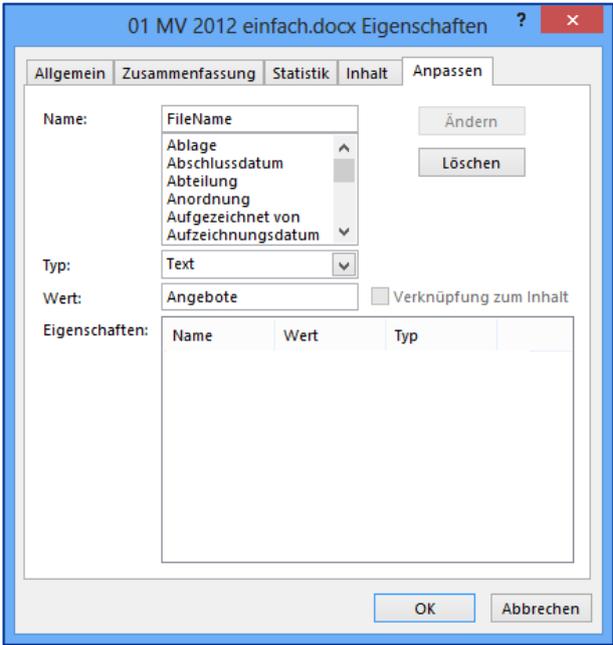


The Word document will be named manually accordingly and saved to company specific folder structures in SharePoint servers etc., as with any Word documents.

In companies, quotes, orders and invoices are usually saved with a specific formatting to corresponding customer folders. This process, however, may be very complex with an increasing number of documents. Additionally, spelling mistakes may occur, which makes it harder to later find the documents.

With the CRM Word Interface the user can in advance define a specific name structure for the documents to be created.

The definition is set, similar to the property tag, in the extended properties of the document in the “Customize” tab.



Name: FileName
Value: Quotes
(Any text possible)

Output in the Word document:

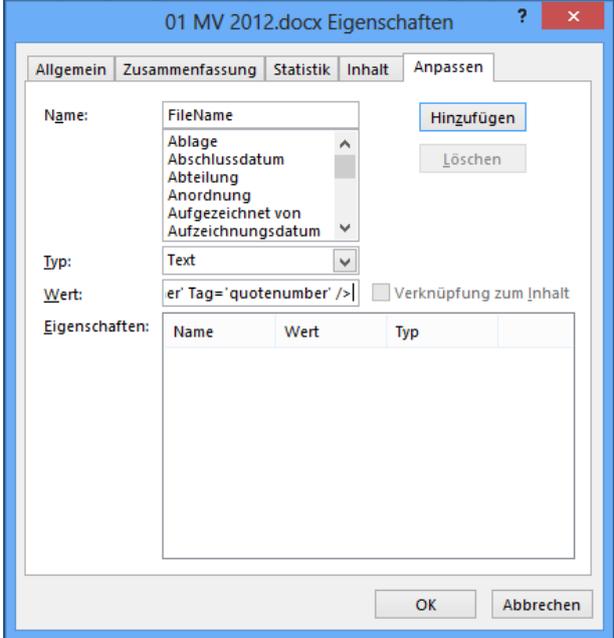


The document's "FileName" property can also define dynamic field contents as part of the document's name. Therefore, use the input mask, just as working with the property tag:
<PropertyTag Title='Name' Tag='name' />.

Example:

Quote number:

<PropertyTag Title='quotenumber' Tag='quotenumber' />

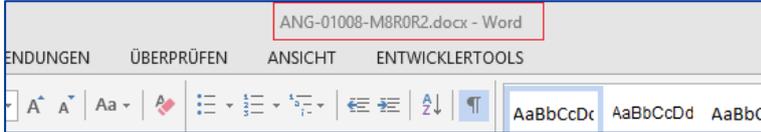


Name: FileName
Value: <PropertyTag Title='Quotenumber'
Tag='quotenumber' />

Please note:

Title and tag are written between primes (**no apostrophe**).

Output in the Word document:

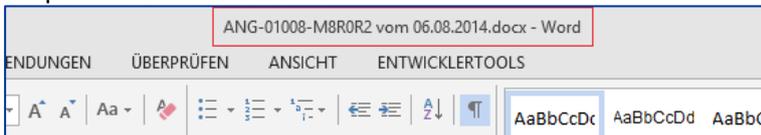


The output in the Word document can also happen by combining free text and output of CRM fields. To do so, carry out the property tag multiple times . Please insert wanted blanks or text where needed.

Example: combination of quote number and current date:

```
<PropertyTag Title='quotenumber' Tag='quotenumber' /> vom <PropertyTag Title='date' Tag='newdate,date_de' />
```

Output in the Word document:



3.10.4 ALIAS

When using shortened queries, it may happen that the 64-character-limitation of Microsoft Office Word is reached and/ or exceeded.

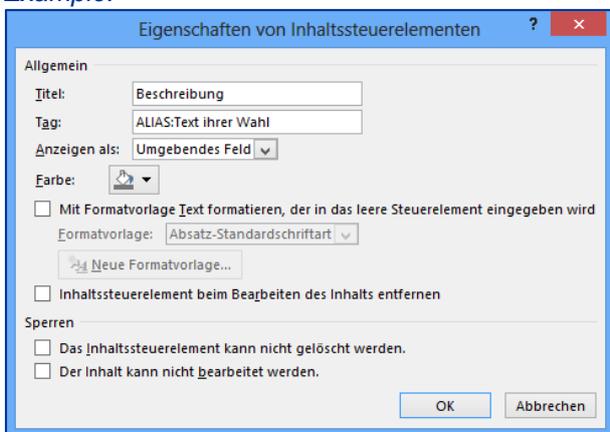
To avoid this limitation, use the ALIAS function. (This function can be used with all tags. For reasons of simplicity, we will illustrate our example with a “simple” tag.)

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 titled unambiguously.

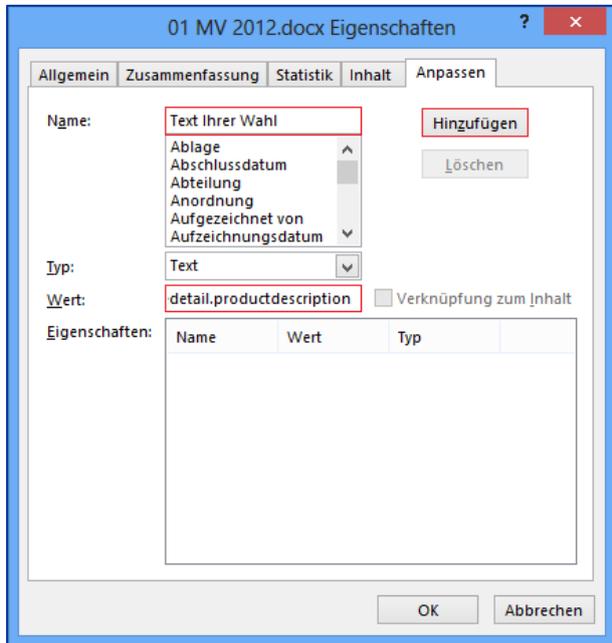
Example:



Title: description
Tag: ALIAS:Text of your choice

Please note:

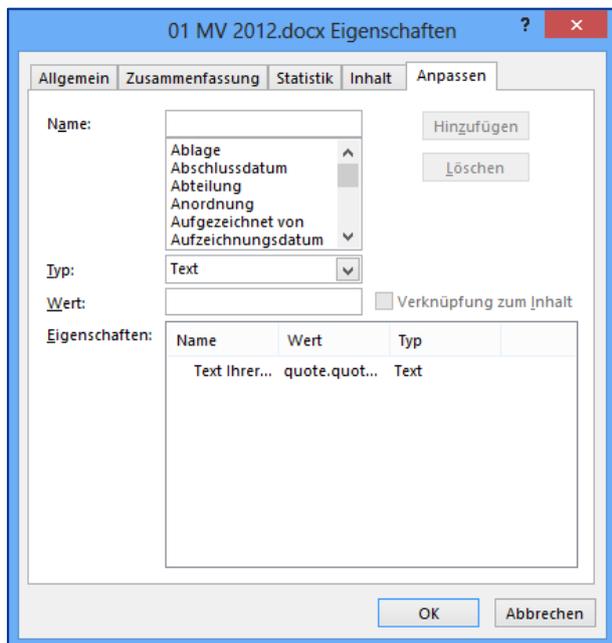
The word ALIAS must always be written in capitals, the colon is added without blanks, the ALIAS text follows without blanks as well.



Set the following tag via the “Customize” tab in “extended properties” of the Word document.

Name: Text of your choice
(the assigned ALIAS(name))

Value: quote.quoteid.quotedetail.productdescription
(Tag for the description)



Clicking the “Add” button completes this step

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

Please note:

With Microsoft Office 2016 the character limitation is raised as far as using ALIAS can be dispended.

3.11 SubTemplate

With the “SubTemplate”, Word templates created for other entities can be inserted in the current template.

Example:

A template named “quote item” was created for the “quotedetail” entity. Now, we want to insert the description (description) of the quote in order to provide the customer with further information on the product.

The template for the entity “quote item” looks as follows:

Der Preis für die Word-Schnittstelle für Microsoft Dynamics CRM setzt sich zusammen aus:	
dem Preis für die Schnittstelle	960,00 €
dem Preis für den zweijährigen Software Assurance	317,00 €
 Die Erstausslieferung der Word-Schnittstelle erfolgt immer mit Software Assurance	

Please note:

The template to be inserted must be saved in the appropriate size and formatting, otherwise shifting, especially in tables, may require manual adjustments.

In our example, we set the “SubTemplate” tag in the quote’s template at the wanted place as follows:

Title: SubTemplate,quoteitem
 Tag: quoteid.quotedetail.quotedetailid

The title of this tag is composed of the name of the tag (SubTemplate) and, separated by comma (without blanks), **the name of the template** to be inserted.

The Output in the Word document looks as follows:

Pos	Menge	Bezeichnung	Einzelpreis netto	Gesamtpreis netto
1	1	Word-Schnittstelle für Microsoft Dynamics CRM	1.277,00 €	1.277,00 €
		Der Preis für die Word-Schnittstelle für Microsoft Dynamics CRM setzt sich zusammen aus:		
		dem Preis für die Schnittstelle	960,00 €	
		dem Preis für den zweijährigen Software Assurance	317,00 €	
		 Die Erstausslieferung der Word-Schnittstelle erfolgt immer mit Software Assurance		
Endsumme (netto)				1.277,00 €

The SubTemplate tag does **not** refer to a field, but to the ID. In our example, it refers to the quote item’s ID. If a quote consists of several quote items summarized in a table, the tag must be inserted **for any item**.

For reasons of simplification of the formatting, an automatic page break can be set for the “SubTemplate” tag. This can be carried out with the help of the additional tag “breakbefore”, separated by a comma.

Example:

Title: SubTemplate,Angebotsposition
Tag: quoteid.quotedetail.quotedetailid,breakbefore

For carrying out the page break after inserting the “SubTemplate” tag, please enter the additional tag “breakafter” after the tag.

Example:

Title: SubTemplate,Angebotsposition
Tag: quoteid.quotedetail.quotedetailid,breakafter

For carrying out a page break both before and after the “SubTemplate” tag, both tags have to be entered afterwards.

Example:

Title: SubTemplate,Angebotsposition
Tag: quoteid.quotedetail.quotedetailid,breakbefore,breakafter.

3.12 partylisten fields

MS Dynamics CRM has, in addition to its standard fields, so-called partylists. These fields appear at different places with different purposes. Examples are the resource fields in the activities or sender and recipient of emails. Partylists can be recognized by the possibility to save several records in this field. One can, for example, not only save several system users, but also devices.

In order to use a partylist, a different syntax is required. This syntax is similar to the syntax of tables.

Title: list
Tag: customers,customer

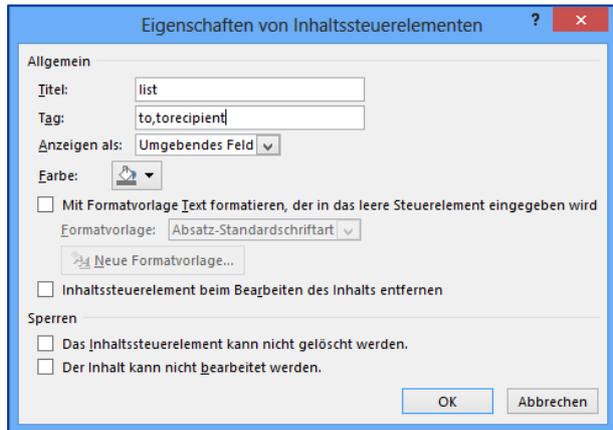
The title “list” defines the list as a partylist. “customers” is the schema name of the service activity, which we want to output. “customer”, separated by a comma, is the partylist type. The field name indicates the partylist type. There are different types.

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. users and queues. .	2
ccrecipient	cc	Copy-recipients (Cc:)	3
bccrecipient	Bcc	Blind-copy recipients (Bcc) in emails	4
requiredattendee	requiredattendeess	Required attendee (appointments)	5
optionalattendee	optionalattendeess	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	Partners	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 output them in 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 April 30th 2014
Interface purchaser ABC
Marie Mustermann
Silke Schräber

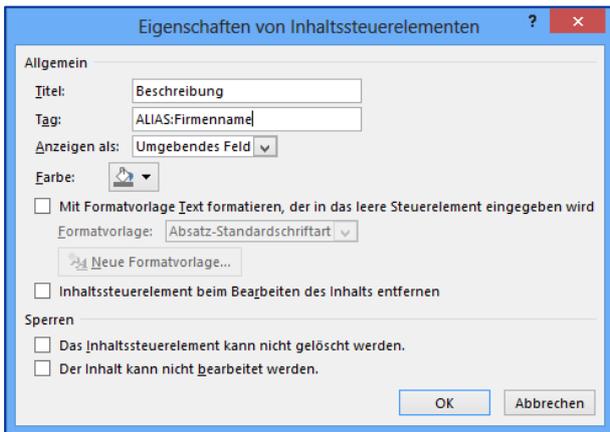
3.12.1 Information retrieved from party list fields

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

Please note:

With Microsoft Office 2016 the character limitation is raised as far as using ALIAS can be dispended.

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



Information is saved via the “extended properties” of the document in the “Customize” tab as follows:

Name: enter the name given in the tag with the ALIAS function.

Example:

Name: company name

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

The value (tag) composes as follows:

Path description	Tag	Content
From the email	email	Schema name of the activity
Via the relations field	activityid	Schema name of the relations field
To the activity parties	activityparty	Schema name of the activity party

Every party list field has an unambiguous identification number. This number is listed in the table below. We refer to this number in brackets.

Inserting the body	[participationtypemask='2']	Body with the unambiguous identification number
Relation field between email recipient and contact	partyid	Schema name of the relation field
To the contact record	contact	Schema name of the “contact” entity
Via the relation field to the parent customer	parentcustomerid	Schema name of the relation field
To the customer’s record	account	Schema name of the “company” entity
Output of the field “customer’s name”	name	Schema namen of the “company name” field “

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

Tag for company name:

email.activityid.activityparty[participationtypemask='2'].partyid.contact.parentcustomerid.account.name
(shortened:
activityid.135[participationtypemask='2'].partyid.2.parentcustomerid.1.name)

Tag for the company's location:

email.activityid.activityparty[participationtypemask='2'].partyid.contact.parentcustomerid.1.address1_city
shortened:
activityid.135[participationtypemask='2'].partyid.2.parentcustomerid.1.address1_city)

The output in the Word document looks as follows:

Recipients of the email of April 30 th 2013			
Smith	Jane	Interface purchaser ABC	Dahlen
Smith	John	Interface purchaser ABC	Dahlen
Doe	John	Any company	Any city
Paulmann	Paul		
Public	John Q.	Friedenswerft	Friedrichshagen

(The contact Paulmann, Paul is not linked to a company, therefore no data is output.)

The order of the list is arbitrary without sorting. If sorting is desired, this will be done using the table tag.

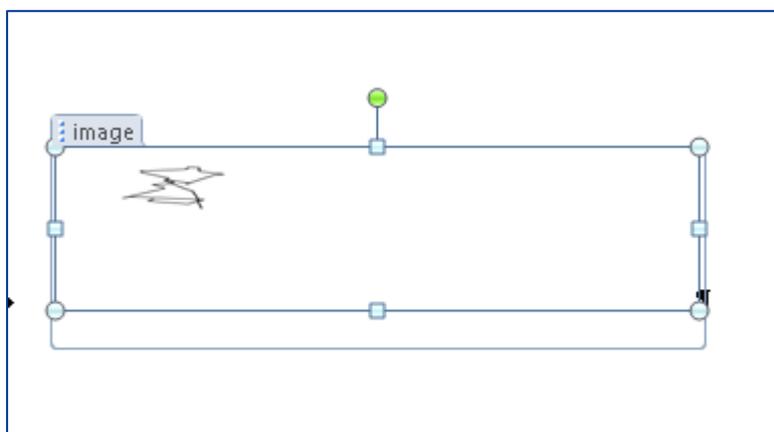
3.13 Images

With our CRM Word Interface, the user can insert images in the Word template.

Thereto, insert placeholder image in the proper size at the position in the Word template, where the image should be output. Mark the entire image as Rich text content control element. Every image is named "image".

For the tag, enter the field which contains the path for the image to be inserted. In our example, we use the "description" field in the quote entity.

Tag: description.



(View in the Word template)

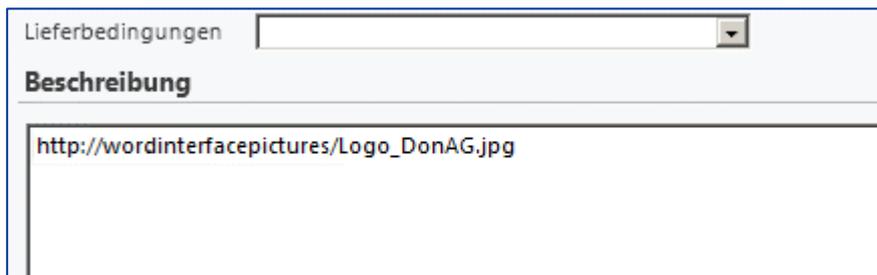
The directory, where the images to be inserted are saved, must allow the CRM server to access. It is also possible to state the URL of an image in the internet which can be accessed by the CRM server. The path has to be described (starting by the CRM server).

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

Please note:

Inserting images from the local file system is only available in the OnPremise version of the Interface. With the Online version, only images from URLs can be inserted.

We want to insert the Donaubauer AG logo.



The screenshot shows a CRM interface with a dropdown menu labeled 'Lieferbedingungen' and a text field labeled 'Beschreibung'. The text field contains the URL 'http://wordinterfacepictures/Logo_DonAG.jpg'.

The output of the Word Interface looks as follows:



The image format saved in the Word template has to match the format of the image to be inserted. If this is not the case, the image to be inserted will be fitted to match the setting of the Word document. This may result in an unwanted, distorted image.



3.14 Hyperlinks

The hyperlink tag allows the user to insert a hyperlink into the document, with the hyperlink’s destination address being retrieved from Dynamics 365. The text to be shown in the hyperlink may be a text determined in the template or be defined by another Interface element.

The title is always “hyperlink”. The tag contains the query for the destination address to which the hyperlink refers. Using the format tag can help generating a URL of the field’s value in the CRM.

3.14.1 Fixed hyperlinks

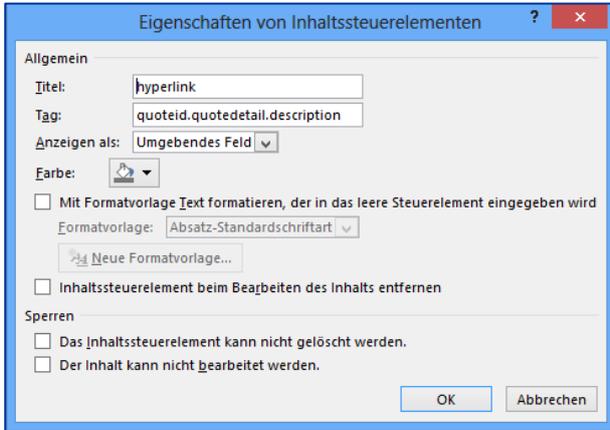
Example:

All quotes of the Donaubauer Aktiengesellschaft are sent by email.

The single quote items should refer to the corresponding products on the website.

The URL to the products is set in the “description” field in the quote item.

The part of the text (here: the word “link”), which should be output as hyperlink, is marked as Rich Text content control element and defined as follows:



Title: hyperlink
Tag: quoteid.quotedetail.description

Output in the Word document:

	1	CRM Word Schnittstelle - Version: Enterprise	1.277,00 €	1.277,00 €
Weitere Informationen finden Sie hier: Link				
	1	CRM SharePoint Schnittstelle - Version: Enterprise	2.584,00 €	2.584,00 €
Weitere Informationen finden Sie hier: Link				
Endsummen (netto)				3.861,00 €

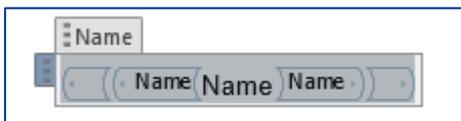
3.14.2 Variable hyperlinks

A CRM field can be configured as hyperlink as well.

Example: the quote's name:
The URL is saved in the “description” field of the quote.

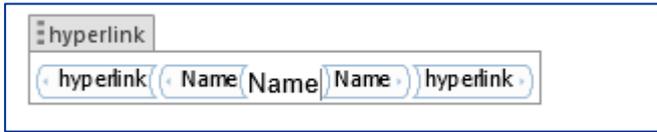
Title: Name
Tag: name

The text defined this way is marked as Rich text content control element again.



This tag gets a reference to the field which contains the path for the link. In our example, the URL is saved in the “description” field of the quote.

Title: hyperlink
Tag: descripton

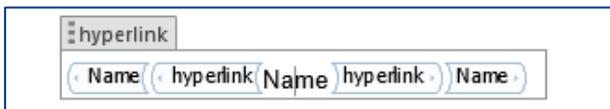


The output in the Word document looks as follows:

Pos	Menge	Bezeichnung	Einzelpreis netto	Gesamtpreis netto
	1	CRM Word Schnittstelle - Version: Enterprise	1.277,00 €	1.277,00 €
	1	CRM SharePoint Schnittstelle - Version: Enterprise	2.584,00 €	2.584,00 €
Weiter Informationen zu unseren Produkten erhalten Sie hier: CRM Word- und CRM SharePoint Schnittstelle				
Endsummen (netto)				3.861,00 €

Please note:

When generating the hyperlink tag, please pay attention for that the hyperlink does not shift, but encloses the entire defined tag (as shown in the image below).



3.15 HTML content

With our CRM Word Interface, HTML content saved in the fields of the CRM system can be transferred in the Word document created by the Interface. The formatting, coloration and punctuation set in the HTML structure is adopted in the Word document.

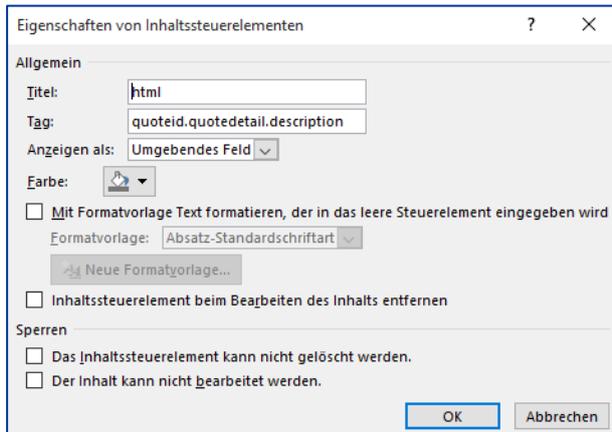
The formatted text is adopted into the Word document the way it is set in the HTML data. There is no further adjustment of the text. The saved HTML data must not contain Java Script, it is, however, essential to ensure that only valid formatting is contained. Otherwise, the text will not be output correctly in the Word document.

An adjustment of the view when transferring the HTML content to Microsoft Office Word does not take place. This applies especially for HTML structures and texts exceeding a DIN A4 page. Only HTML elements supported by the used Microsoft Office Word version can be used. Tags for images must not be used.

The place where the HTML text block formatted in the Word document is to be inserted, any text/word is marked as Rich text content control element.

The title must be "html". It is not important whether this is written in uppercase or lowercase letters.

As tag, enter the field containing the HTML data.



For reasons of simplification of the formatting, an automaticpage break can be set for the html tag. This can be carried out with the help of the additional tag “breakbefore”, separated by a comma.

Example:

Title: html
Tag: quoteid.quotedetail.description,breakbefore

For carrying out the page break after inserting the html tag, please enter the additional tag “breakafter” after the tag.

Example:

Title: html
Tag: quoteid.quotedetail.description,breakafter

For carrying out a page break both before and after the html tag, both tags have to be entered afterwards.

Example:

Title: html
Tag: quoteid.quotedetail.description,breakbefore,breakafter

3.16 Primary keys of the entity

Retrieving fields can cause problems if

- there is a relationship between two entities with both entities having a field with the same name but different meaning and
- if a field is to be retrieved which relates one entity to itself.

Example:

From the company (account) via a field to an attached company (account).

The tag would compose as follows:

Tag: quote.customerid.account.fieldname.account

(Entity A → field of entity A → Minus (-) →primary key entity B → entity B)

For one-to-many or many-to-one relationships one of the involved entities is assigned with a primary key. This primary key for the entities is the entity’s schema name with “id” at the end.

contact → *contactid*
quote → *quoteid*
salesorder → *salesorderid*

An exception are, however, all entities that can be combined as activities (telephone calls, tasks, email, etc.)
The primary key for activities is always: *activityid*.

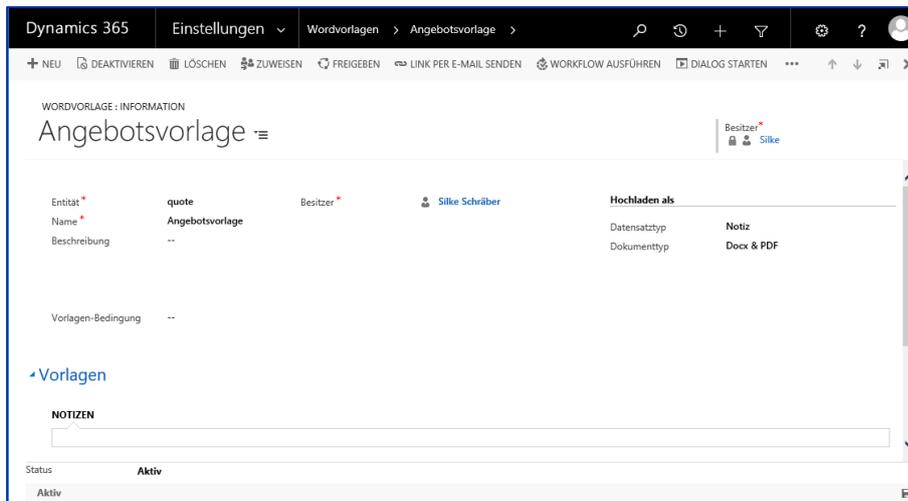
4 Working with the generated templates

4.1 Attaching the Word template

4.1.1 Attaching the Word template as new note

As the Word template is finished, it has to be taken over into the system.

There to, go via the “settings” area to the “Word templates” navigation button. All generated and active Word templates are listed here. Please open the Word template to which the generated templates should be attached to (in our example the quote template) and save the template as note, just as usual in CRM.

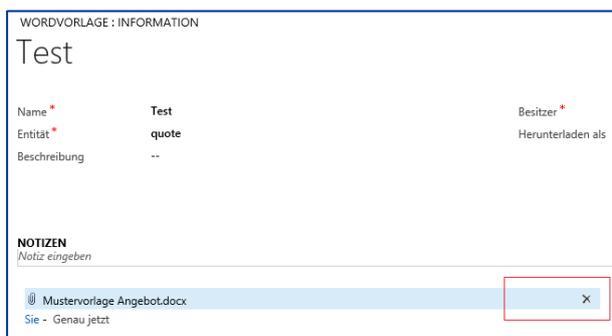


A new record named “quote template” was generated in the “quote” entity. When restoring with the CRM Word Upload Button, a “.docx” file and a “.pdf”-file are generated. (This selection is pre-defined, but can be changed manually).

4.1.2 Exchanging the Word template

When generating Word templates, they are always subject to modifications or updates. The modified Word template has to be attached as note to the corresponding record after every change. The system automatically identifies the latest version by the date and uses it. The old template remains in the system as well.

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.



Mouse over the note and delete the appearing cross,

WORDVORLAGE : INFORMATION

Test

Name * Test Besitzer *

Entität * quote Herunterladen als

Beschreibung --

NOTIZEN

Titel

Beschreibung

Anfügen

Stay in the field and add the new Word template according to the CRM philosophy.

Only the current date and time of saving are documented here.

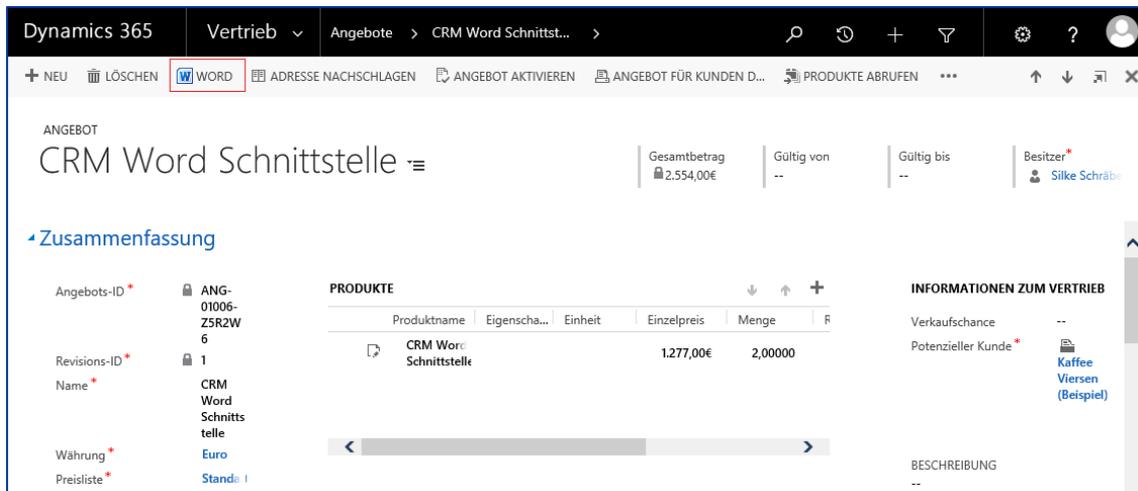
Please note:

The disadvantage of exchanging Word template is the fact, that older templates are no longer available. Therefore, they should be saved otherwise to use them in case of need.

4.2 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.

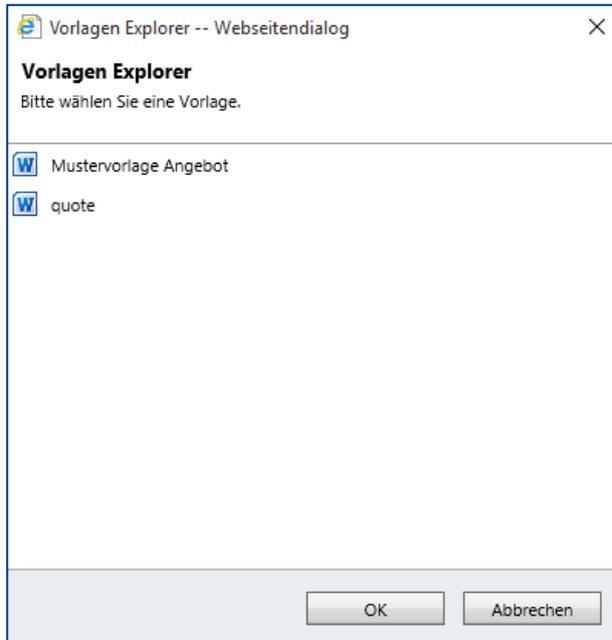


With the Enterprise version of the CRM Word Interface you can generate any number of templates for every entity. The template explorer lists all active templates for the selected entity.

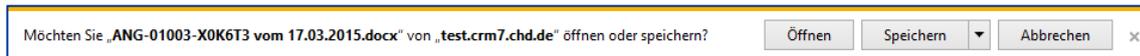
The template can be selected by double-clicking on the template itself or by single-clicking on it and then using the “OK” button.

If only one template is available in the selected entity, this step will be skipped and the template download will start immediately.

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 be saved first or opened immediately.



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

Result:




|

Schnittstellenverkäufer AG
[Addon-Straße 100, D-01234 Microstadt](#)

Schnittstellenkäufer ABC
Herr Don Addon
Wurzener Straße 10
04774 Dahlen

Angebots-Nr.	ANG-01005-S2G3H1	Bearbeiter:	Schräber	Datum:	2013-09-05
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Angebot

Sehr geehrter Herr Addon,

aufgrund Ihrer Nachfrage möchten wir Ihnen nachfolgendes Angebot unterbreiten:

Pos	Menge	Bezeichnung	Einzelpreis netto	Gesamtpreis netto
1	1,00	Word-Schnittstelle für Microsoft Dynamics CRM	960,00 €	960,00 €
2	1,00	Softwarepflege zur Word-Schnittstelle für Microsoft Dynamics CRM	317,00 €	317,00 €
Die Softwarepflege gewährleistet Ihnen die Upgrade-Sicherheit bei zukünftigen Versionen und gilt 2 Jahre. Gültigkeit:				
Endsummen (netto)				1.277,00 €

Dieses Angebot besteht zuzüglich der geltenden Mehrwertsteuer und ist bis zum gültig.
Es gelten die Allgemeinen Geschäftsbedingungen der Schnittstellenverkäufer AG.

Mit freundlichen Grüßen
Ihre Schnittstellenverkäufer AG

5 Demo restrictions for test versions

Demo restrictions occur after the expiration of a test version or a temporary version of the CRM Word Interface.

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 therefore, the generated document cannot be used.

Schnittstellenverkäufer AG
Addon-Straße 100, D-01234 Microstadt

sCHniTtsTelliEnKäUFER aBC
HerR dON AddON
wuRZenER StrAße 10
04774 daHLeN

Angebots-Nr.	AnG-01005-S2G3H1	Bearbeiter:	sCHrÄBeR	Datum:	2013-09-05
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Angebot

Sehr geehrter hERr aDdOn,

In order to prolong your test version or purchase a license key without time limitation, please contact lizenzen@donaubauer.com.

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

6 Frequently asked Questions on the CRM Word Interface)

6.1 Rights and security roles

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

The CRM Word Interface is sold with two security roles. It distinguishes between the CRM Word Interface administrator and the CRM Word Interface user.

Sicherheitsrolle: CRM Word Interface Administrator									
Entität	Erstellen	Lesen	Schreiben	Löschen	Anfügen	Anfügen an	Zuweisen	Freigeben	
Ereignisprotokoll	●	●	●	●	●	●			
Konfiguration	●	●	●	●	●	●			
Wordvorlage	●	●	●	●	●	●	●	●	

Sicherheitsrolle: CRM Word Interface User									
Entität	Erstellen	Lesen	Schreiben	Löschen	Anfügen	Anfügen an	Zuweisen	Freigeben	
Ereignisprotokoll	●	●	○	○	○	●			
Konfiguration	○	●	○	○	○	○			
Wordvorlage	○	●	○	○	○	○	○	○	○

Hence, all necessary rights and securities are pre-installed and do not need be defined separately.

6.2 The set tag is too long

6.2.1 CRM Metadata Browser

Since the tags in Microsoft Office Word are limited to 64 characters, it may happen that the definition of the complete tag expires the character limit. In this case, the user can enter the entity numbers instead of the entity names.

To look up entity numbers, the user can install the CRM Metadata browser.

Use the following link to download the CRM Metadata browser

for CRM 2013

<http://www.microsoft.com/en-us/download/details.aspx?id=40321>

and for CRM 2015

<http://www.microsoft.com/en-us/download/details.aspx?id=44567>

The browser has to be installed by a user with the rights to import solutions in the system.

Download the browser according to the instructions on the website.

The CRM Metadata browser is not a product of the Donaubauer Aktiengesellschaft.

Example: Tag for salutation

With entity name: customerid.account.primarycontactid.contact.salutation

With entity number: customerid.1.primarycontactid.2.salutation

Please note:

The entity numbers of the user-defined entities may vary depending on the system. If, for example, the templates are generated in a test system, it may be necessary to adjust the templates in the productive system with regard to the entity numbers.

After the migration of CRM systems the entity numbers of the user-defined entities may vary as well.

For further information on setting tags, please go to the paragraph [Creating a template](#) in this manual.

6.2.2 ALIAS

When, however, after using the shortend form the tags are still longer than 64 characters, please use the ALIAS function. All necessary steps are described more in detail in the paragraph ["ALIAS"](#)

Please note:

With Microsoft Office 2016 the character limitation is raised as far as using ALIAS can be dispended.

6.3 Navigating between the content control elements

When creating Rich text content control elements, the stated definitions may overlap.



The Rich text content control element essential for this row is shown in the left picture, highlighted with a red frame. Simply activate this element by one-click and then set the corresponding tag.

It is also possible, that the definitions literally overlap each other. In such cases, it may help using the arrow keys of the keyboard when setting the tags while generating Word templates.

6.4 The template is not in the template explorer

Please check whether the generated template can be found in the “active Word templates” view or rather in the “deactivated Word templates” view. When the latter applies, please re-activate the Word template.

Additionally, please check whether the Word template is saved to the correct entity in the CRM and the entity name does not have any mistakes. If necessary, correct the entity name.

6.5 No data in the document

The generated Word templates do not contain any data. Please check, whether

- the field to be retrieved contains data,
- the set tag is correct,
- the field to be retrieved is the correct field
- the field to be retrieved is an attribute of the entity.

If no error was found, the log in the interface's configuration record should be set to the highest level. A record will be generated in the "TraceLog" entity. In this record, the user may find the corresponding error and fix it.

When, despite great effort, no result is achieved, please send the entire TraceLog via email or copy it in a text file (please no excel-file) to support@donaubauer.com. Our support team will promptly report back to you.

6.6 The template explorer does not open

When the template explorer does not open after clicking the Word button, a standard version of the CRM Word Interface was installed in the CRM system. If already multiple templates for an entity are generated, an error message will appear after clicking the Word button.

With the standard version of the CRM Word Interface, only one template can be generated per entity. When you need multiple templates per entity, please purchase the Enterprise version of the CRM Word Interface.

6.7 Currency values

The corresponding currency or the currency symbol can be retrieved by any entity which contains at least one currency field.

Example: Invoice item:

The table with the invoice items is defined with the format tag. Therefore, the currency symbol is not shown automatically. If the symbol is to be output directly in the table (not the header), this will be done with the following tag.

Tag: invoiceid.invoicedetail.transactioncurrencyid.transactioncurrency.currencysymbol

6.8 Filter (extended example)

Products of different “product types” are offered.

Pos	Menge	Bezeichnung	Einzelpreis netto	Gesamtpreis netto
1	1,00	CRM Word Schnittstelle	1.277,00 €	1.277,00 €
2	10,00	CRM Bing Maps Schnittstelle für 10 Benutzer	294,00 €	2.940,00 €
3	1,00	Workshop (2 Tage mit Übernachtung)	1.400,00 €	1.400,00 €
4	1,00	Schulung 3 Tage (MOC 1234) mit Übernachtung	4000,00 €	4.000,00 €

The products listed should be sorted into different tables, whereby the product types “Workshop” and “training” should be output in one table, regardless of the formatting.

The field “product type” (product_typ_opt) was inserted in the “product” entity as set of options.

The following values are defined in the set of options:

“Software” = 157.420.000

“Workshop” = 157.420.002

“Training” = 157.420.003.

There are 2 additional options (with the values 157.420.001; 157.420.004).

Procedure:

A table is created for every product type.

Table 1 should only list the products with the product type “Software” (value in the set of options 157.420.000)

The tablerow tag is set around the table row und defined as follows:

Tag: quoteid.quotedetail.productid.product.product_typ_opt = 157420000

The row containing the description should only be shown if the field “description” is filled. This condition is added to the tag, separated by a comma.

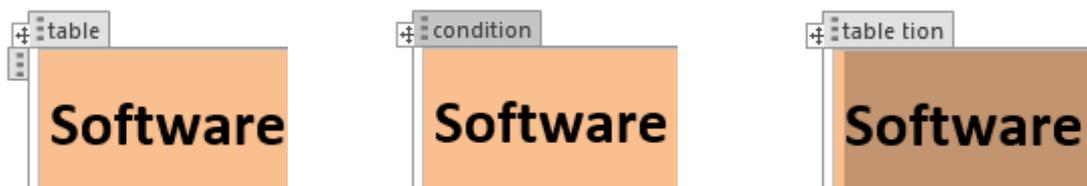
Tag:

quoteid.quotedetail.productid.product.new_product_typ_opt = 157420000,quoteid.quotedetail.description notnull

Please note: The value from the set of options is added **without** separators.

Thereafter, the table tag is set.

The complete table should only be output, if the quote contains an item with the product type “Software” Thereto, mark the complete table und define it with the condition tag with filters.



The tag is creates us usually till the entity containing the field. The filter itself is added without blanks in brackets. The comparison is carried out with double "equal", followed by the value from the set of options in prime (**no apostrophe**).

Behind the filter, define a field in the entity, which is certainly always there and filled. The "product ID" field would be a good idea for this. The operator ends the tag.

Tag: quoteid.quotedetail.productid.product[product_type_opt=='157420000'].productid notnull.

Please note: Filter must not contain blanks.

Table 2 contains (besides the header) two table rows that are correspondingly defined with the tablerow tag.

Tag: quoteid.quotedetail.productid.product.new_product_typ_opt = 157420002

Tag: quoteid.quotedetail.productid.product.new_product_typ_opt = 157420003

Table 2 should only be output, if the quote contains a product of the product type "Workshop" or "training". The operator "or" cannot be used.

The condition tag for table 2 is set as follows:

Tag:

quoteid.quotedetail.productid.product[new_product_type_opt!='157420000';new_product_type_opt!='157420001';new_product_type_opt!='157420004'].productid notnull

result:

Software				
Pos	Menge	Bezeichnung	Einzelpreis netto	Gesamtpreis netto
1	1,00	CRM Word Schnittstelle	1.277,00 €	1.277,00 €
		Version: Enterprise		
2	10,00	CRM Bing Maps Schnittstelle bis 14 Benutzer	294,00 €	2.940,00 €
Schulungen/Workshops				
Pos	Menge	Bezeichnung	Einzelpreis netto	Gesamtpreis netto
3	1,00	Workshop (2 Tage mit Übernachtung)	1.400,00 €	1.400,00 €
		Andere Formatierung der Tabelle.		
4	1,00	Schulung 3 Tage (MOC 1234) mit Übernachtung	4.000,00 €	4.000,00 €

Please note: Blanks/white spaces between the single tables should be included with the condition tag, since they are transferred when outputting the document.

Please note: When sorting tables this way, it is not possible to subtotal the single tables, unless the CRM system contains the corresponding fields with these values.

Please note: Sorting by the field "lineitemnumber" is not provided, unless the products are entered in the CRM in the correct order oder entered manually.

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

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