

CRM WORD MERGE USER GUIDE

Create Word Merge Templates with deep data
relationships in Dynamics 365

MICROSOFT LABS

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Introduction

CRM Word Merge provides additional capabilities beyond the out of the box Word Templates feature. The relationship builder allows for the selection of views that have been created for related entities (One-to-Many and Many-to-One relationships) and include them as tables in the document template. It also provides the ability to add “second-level” relationships and views providing much more flexibility when building templates.

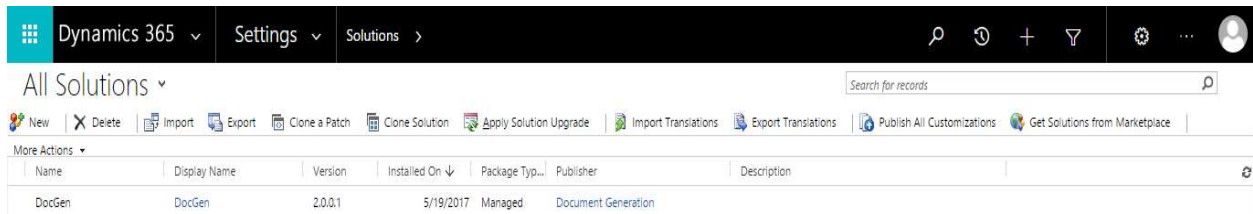
For an example scenario, consider a template based on the account entity. On the account form there are two sub-grids for contact records. Each sub-grid is based on a different, filtered, custom system view (e.g. one for “internal” contacts and the other for “customer” contacts). CRM Word Merge will allow the user to add each of the views in the account template as separate tables, displaying the data as it is represented on the CRM form. To go even further, it is also possible to drill into the Contact relationships (e.g. Contact -> Activities) and add any of those views to the template.

The solution provides much more control over the data that can be represented in a template and adds considerable business value.

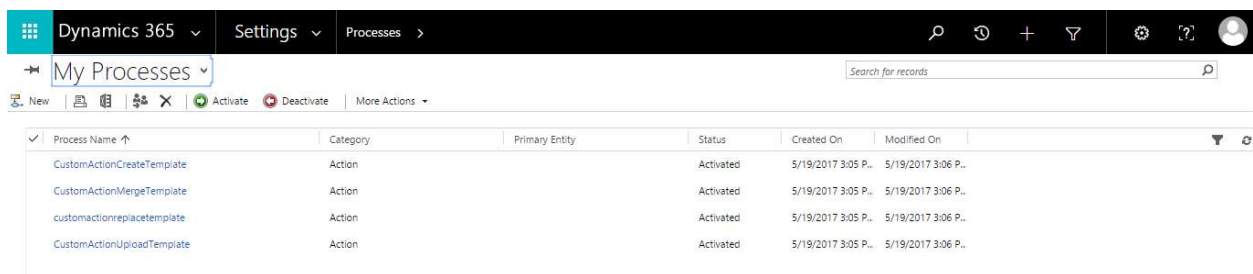
Verify the Solution Installation

After downloading the solution from <https://appsource.microsoft.com/en-us/> the following components should be present in Dynamics 365:

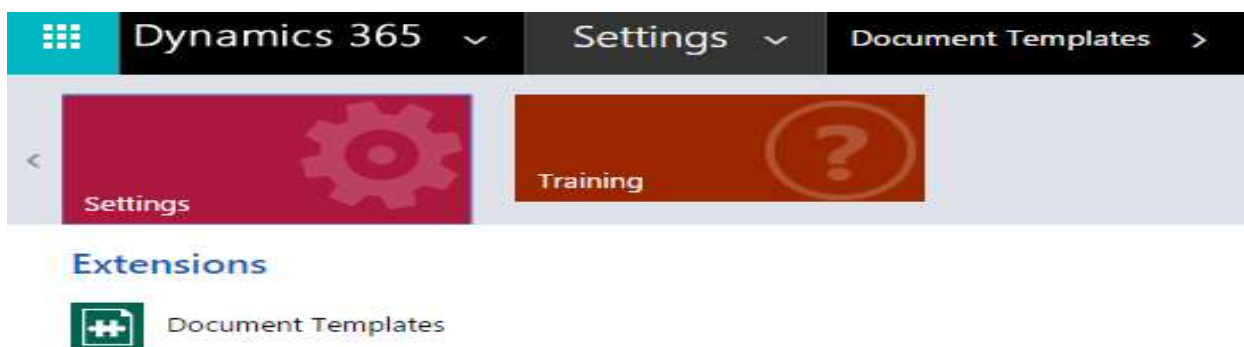
1. CRM Word Merge Solution



2. Custom Actions for Create, Upload, Replace and Merge templates



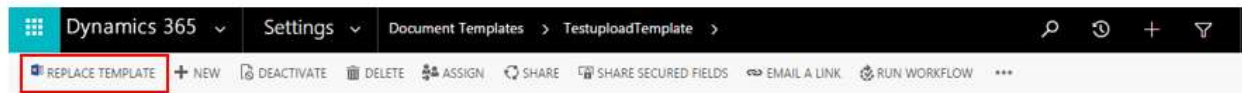
3. Document Template entity under Settings | Extensions area.



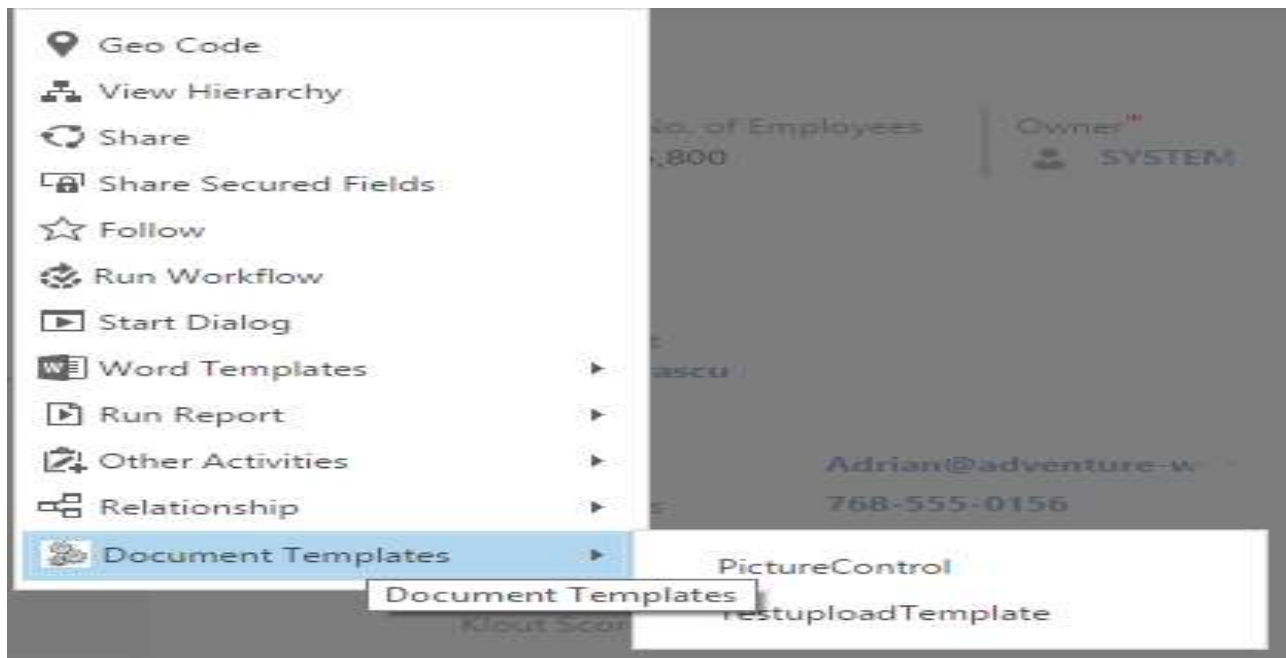
4. Create Template/Upload Template buttons on the Document Template entity ribbon.



5. "Replace Template" button on uploaded template ribbon:



6. "Document Templates" button on the ribbon of any entity that has a Template configured for it. For example, as the result of creating the first CRM Word Merge template for the Account entity, the Document Templates option will appear under the ellipse menu from the Account form Ribbon. This will allow the user to run the template against the Account record.



Set User permissions

1. Navigate to Settings -> Security -> Security Roles.
2. Select the related Security Role of the user.
3. Click on the "Customization" tab and provide "Organization" (green) Read permissions for Publisher and Solution entities.

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Custom Entities
Plug-in Assembly								
Plug-in Trace Log								
Plug-in Type								
Process								
Process Configuration								
Process Session								
Publisher								
Relationship								
Sdk Message								
Sdk Message Processing Step								
Sdk Message Processing Step Image								
Sdk Message Processing Step Secure Configuration								
Service Endpoint								
Solution								
System Application Metadata								
System Chart								
Custom Form								

- Click on the "Custom Entities" tab and provide "Organization" level (green) Create, Read and Write permissions for the "Document Template" entity and click save and close.

File Save and Close Actions Help

Security Role: Account Manager Working on solution: Default Solution

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities
Booking Timestamp										
Booking Update Trigger										
Competency Requirement (Deprecated)										
Contact Price List										
Customer Asset										
Delegation										
Document Template										
Estimate										
Estimate Line										
Expense										
Expense Category										
Expense Receipt										
Fact										
Field Computation										
Field Service Price List Item										
Field Service Setting										
Field Service System Job										
Filter										
Find Work Event										

Toggle this row's privileges

Key

- None Selected
- User
- Business Unit
- Parent: Child Business Units
- Organization

Create template

- Login to your Dynamics 365 Application
- Go to Settings -> Extensions -> Document Templates -> Click 'CREATE TEMPLATE'

3. Select the entities to be used in the template. As an example, the steps below demonstrate how to add Contacts associated with the Account (One-to-Many) and the Primary Contact for the Account (Many-to-One).

- i. Select the primary entity e.g. Account

- ii. Choose related entities

Under "One-to-Many Relationships" select "Contact" and choose from the list of Contact Views from the dropdown. This will enable the addition of a table in the template to display Contacts related to the Account.

Under "Many-to-One Relationships" select List for Many-to-Many Relationships and select the views from the dropdown. The example below shows the Primary Contact related to the Account:

Select Entity Account ▼

One To Many Relationships

Many To One Relationships

Select	Related Entity	Relationship Schema
<input type="checkbox"/>	account	account_parent_account
<input type="checkbox"/>	account	msa_account_managingpartner
<input type="checkbox"/>	account	csm_account_account_MasterAccount
<input type="checkbox"/>	businessunit	business_unit_accounts
<input checked="" type="checkbox"/>	contact	account_primary_contact

- iii. If entity selection is complete click on “Download Template” and proceed to step #5

Select Entity Account ▼

One To Many Relationships

Many To One Relationships

Many To Many Relationships

<input type="checkbox"/>	annotation	Account_Annotation
<input type="checkbox"/>	appointment	Account_Appointments
<input type="checkbox"/>	asyncooperation	Account_AsyncOperations
<input type="checkbox"/>	bookableresource	account_bookableresource_AccountId
<input type="checkbox"/>	connection	account_connections1
<input type="checkbox"/>	connection	account_connections2
<input checked="" type="checkbox"/>	contact	contact_customer_accounts
<input type="checkbox"/>	contact	msa_contact_managingpartner
<input type="checkbox"/>	contract	contract_billingcustomer_accounts
<input type="checkbox"/>	contract	contract_customer_accounts
<input type="checkbox"/>	contractdetail	contractlineitem_customer_accounts
<input type="checkbox"/>	customeraddress	Account_CustomerAddress

Select Views

Download Template

4. It is also possible to select 2nd level relationships for One-to-Many Relationships and Many-to-Many Relationships:
- In One-to-Many Relationships, e.g. Account -> Contact, we can select the Contact Entity Relationships by checking the contact entity relationship checkbox and clicking on the hyperlink. In the figure below the relationship path is: Account -> Contacts -> Tasks (related to Contacts)
 - From the Pop up window choose the related entities and click on Save and Close button.

1 Select Entity Account

One To Many Relationships

☐ annotation
☐ appointment
☐ asyncooperation
☐ bookableresource
☐ connection
☐ connection
☒ **contact**
☐ contract
☐ contract
☐ contract
☐ contract
☐ contractdetail
☐ customeraddress

Many To One Relationships

Many To Many Relationships

Parent Entity: contact Relationship Name: contact_customer_accounts

One To Many Relationships

☐ processsession
☐ quote
☐ recurringappointmentmaster
☐ salesorder
☐ serviceappointment
☐ slakpiinstance
☐ socialactivity
☐ socialactivity
☐ socialactivity
☐ socialprofile
☐ syncerror
☒ **task**

Many To One Relationships

Many To Many Relationships

1 of 2 view(s) selected

Check all Uncheck all

☐ My Tasks
☒ All Tasks

Save & Close

Contact_ProcessSessions

quote_customer_contacts

Contact_RecurringAppointmentMasters

order_customer_contacts

Contact_ServiceAppointments

slakpiinstance_contact

socialactivity_postauthoraccount_contacts

Contact_SocialActivities

socialactivity_postauthor_contacts

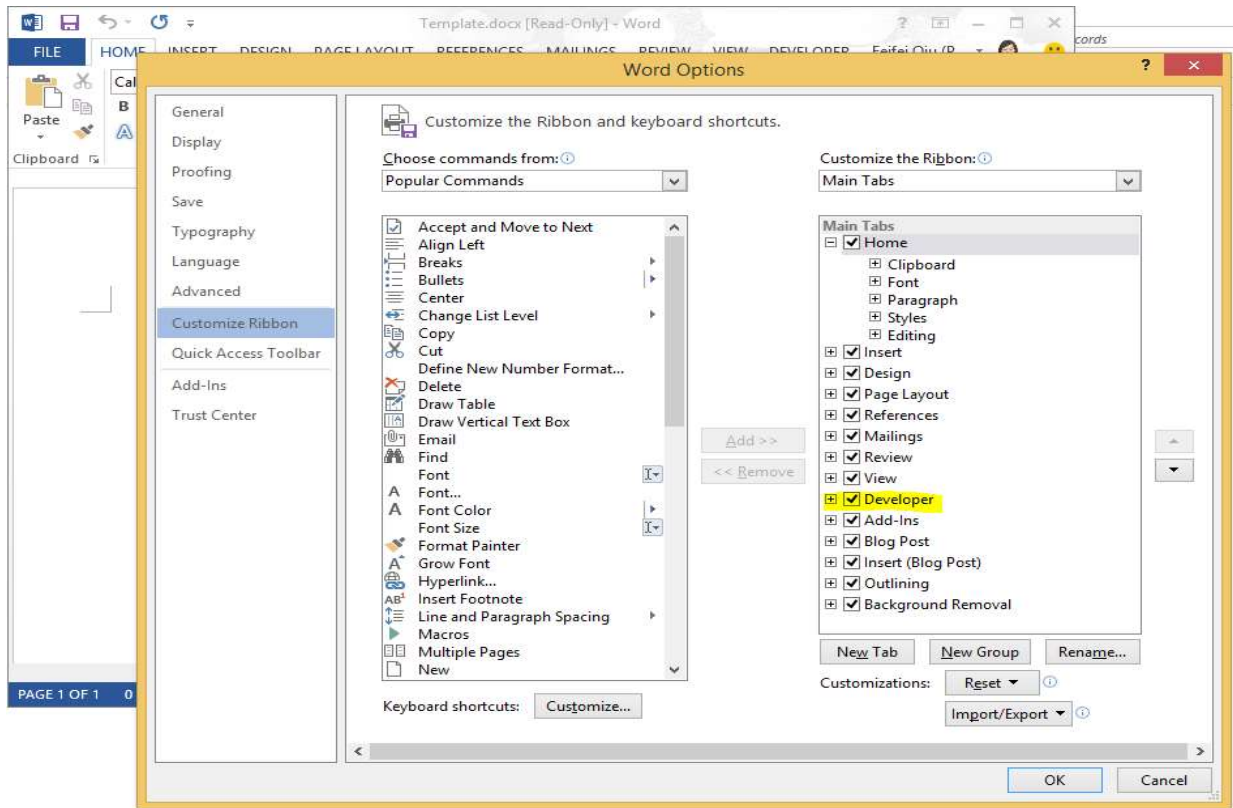
Socialprofile_customer_contacts

Contact_SyncErrors

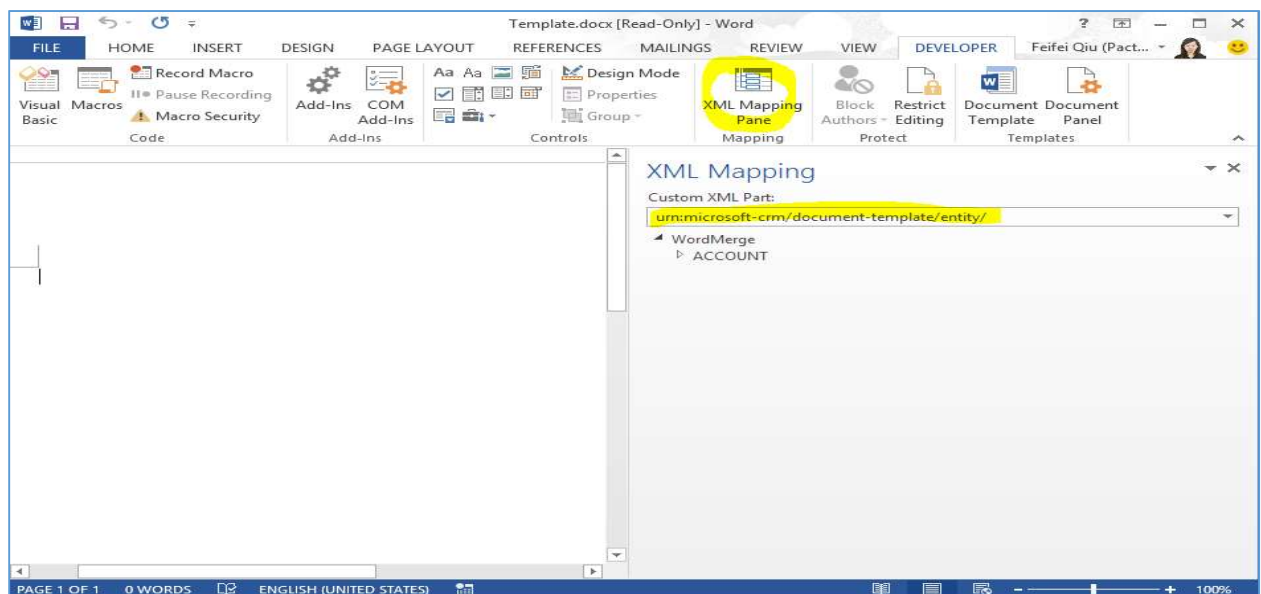
Contact_Tasks

iii. Click 'Download Template'

5. Format the Template: open the Word Template downloaded from last step
 - i. Make sure the "DEVELOP" tab is enabled on the Word Ribbon, Go File -> Options -> Customize Ribbon -> Check Developer

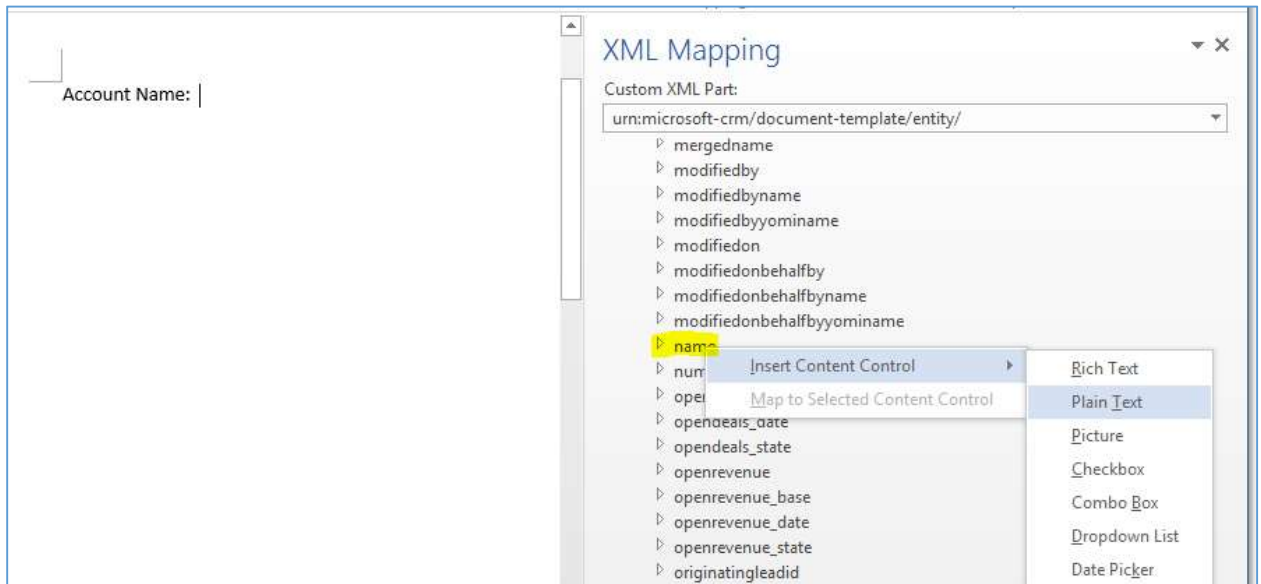


- ii. Navigate to the DEVELOPER tab -> Click 'XML Mapping Pane'-> Select urn:Microsoft-crm/document-template/entity from the dropdown



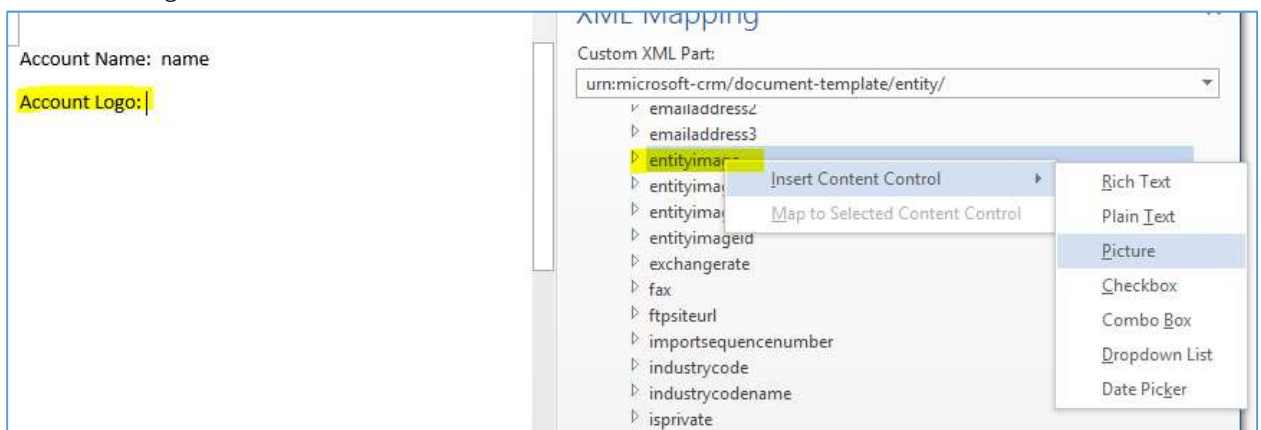
6. Add attributes from the XML Mapping into the template

- i. To add a text field: right click the node in XML part -> Insert Content Control->Plain Text e.g. 'name' attribute for Account

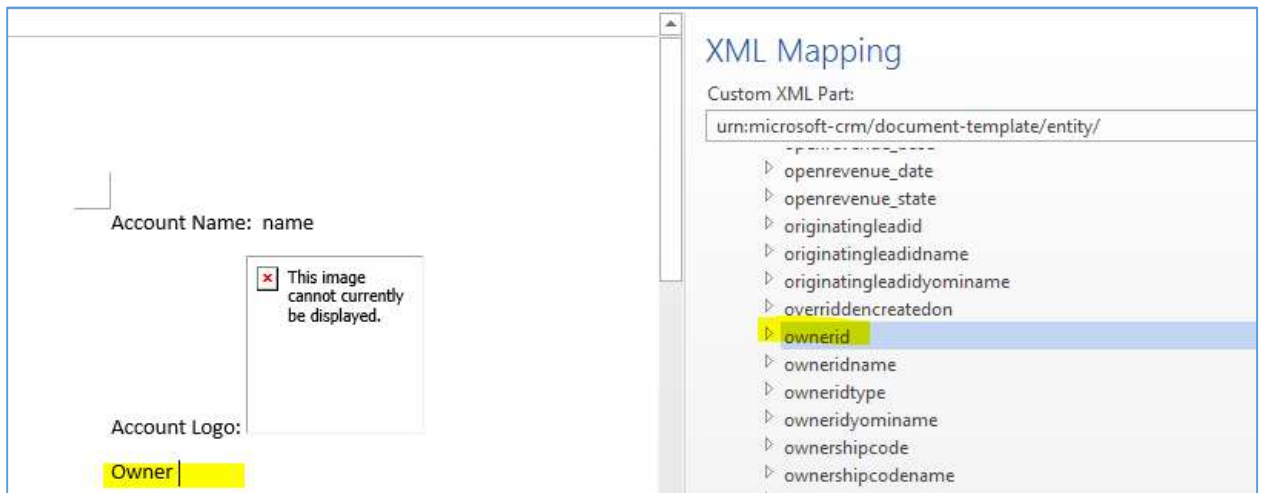


Note: Please refer to the [FAQ](#) section for information on avoiding an unresponsive document when adding attributes.

- ii. To add an Image field: follow the same process as above, but choose "Picture" when inserting Content Control



- iii. To add a Lookup/OptionSet field: same process as above, but it is necessary to choose the 'ID' attribute instead of the 'name' attribute, e.g. Ownerid instead of Owneridname for the Owner lookup field of the Account

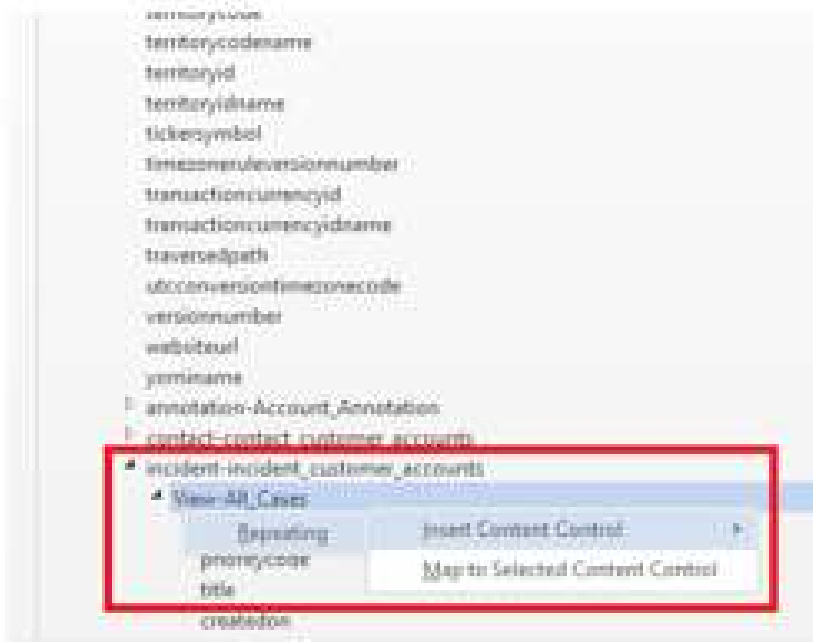


- iv. Add a One-to-Many relationship, e.g. Account related Cases
 - a. Insert a 2-row table, the number of columns depends on how many attributes you want to show and you have in the selected view e.g. add 4 columns to display Case Number, Title, Owner, Case Requestor
 - b. Table header is static text, which can be edited to whatever is desired, it is not necessary to use the system field name
 - c. Use the same approach as described in section 6 above to add these attributes from the XML part

Related Cases

Case Number	Title	Owner	Case Requestor
ticketnumber	title	ownerid	customerid

- d. To display all the related records select the 2nd row, right click 'View-All Cases' under XMP Mapping -> Insert Content Control -> Repeating



- v. Add **Many to One** relationship e.g. attributes for an Account's Parent Account
 - i. Navigate to many to one relationship, in this template, we selected Account-account_parent_account, expand, add any attribute if needed follow the same approach as described in last steps.

ParentAccount	Name
parentaccountid	
address1_telephone1	
websiteurl	
revenue	
ownerid	

XML Mapping

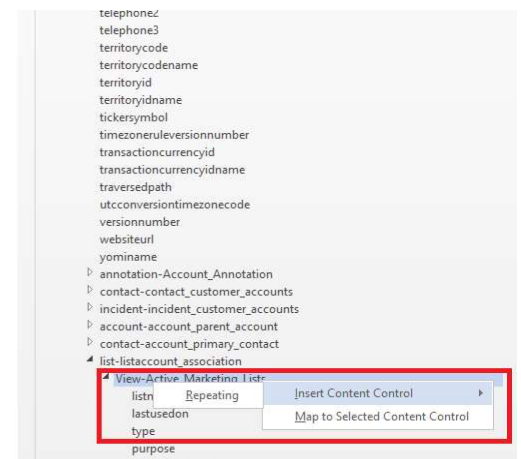
Custom XML Part:

urn:microsoft-crm/document-template/entity/

- transactioncurrencyidname
- traversedpath
- utcconversiontimezonecode
- versionnumber
- websiteurl
- yominame
- ANNOTATION-Account_Annotation
- INCIDENT-incident_customer_accounts
- OPPORTUNITY-opportunity_customer_accounts
- ACCOUNT-account_parent_account**
 - accountcategorycode
 - accountcategorycodename
 - accountclassificationcode
 - accountclassificationcodename
 - accountid
 - accountnumber
 - accountratingcode
 - accountratingcodename

- b. Add **Many to Many relationship**, e.g. Marketing lists, the account is added to: (list-listaccount_association)
 - i. Insert a 2-row table, the number of columns depends on how many attributes you want to show and you have in the selected view. Table header is static text, which can be edited to whatever is desired, it is not necessary to use the system field name
 - ii. Use the same approach as described in step 6 above to add attributes from the XML part
 - iii. Select the 2nd- row, right click 'View-Active Marketing Lists' under XMP Mapping -> Insert Content Control -> Repeating.

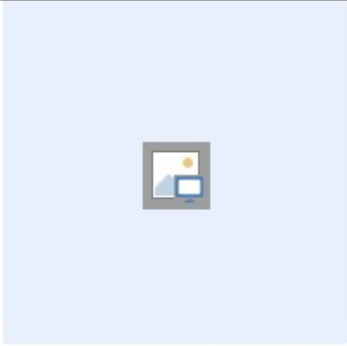
Marketing Lists (N: N)				
List Name	Type	Purpose	CreatedfromCode	ListId
listname	type	purpose	createdfromcode	listid



vi. After adding all the desired attributes save the template into a local folder.

**Below is a sample template, which contains all possible types of attributes and relationships

Account Overview

Name	<u>name</u>		
Address	<u>address1_line1</u>		
	<u>address1_city</u>		
	<u>address1_country</u>		
Revenue	<u>revenue</u>		
Website	<u>websiteurl</u>		
Created on	<u>createdon</u>		
# of Employee	<u>numberofemployees</u>	Parent Account Name	<u>parentaccountid</u>
Tel	<u>telephone1</u>		<u>address1_telephone1</u>
Primary Contact	<u>primarycontactid</u>		<u>websiteurl</u>
Owner	<u>ownerid</u>		<u>revenue</u>
Status	<u>statuscode</u>		<u>ownerid</u>

Related Cases

Case Number	Title	Owner	Case Requestor
<u>ticketnumber</u>	<u>title</u>	<u>ownerid</u>	<u>customerid</u>

Marketing Lists (N: N)

List Name	Type	Purpose	<u>CreatedfromCode</u>	<u>Listid</u>
<u>listname</u>	<u>type</u>	<u>purpose</u>	<u>createdfromcode</u>	<u>listid</u>

Upload template using CRM Word Merge

1. Log in your CRM Application
2. Go to Setting -> Document Templates -> Click 'UPLOAD TEMPLATE'
3. The System pops up the below dialog window:
 - a. Fill in the Template Name
 - b. Choose and upload a locally saved template

Upload Template

Template Name

Template File No file chosen

4. Click 'Submit'. The template will be listed under the "Active Document Templates" view.

Dynamics 365 Settings Document Templates

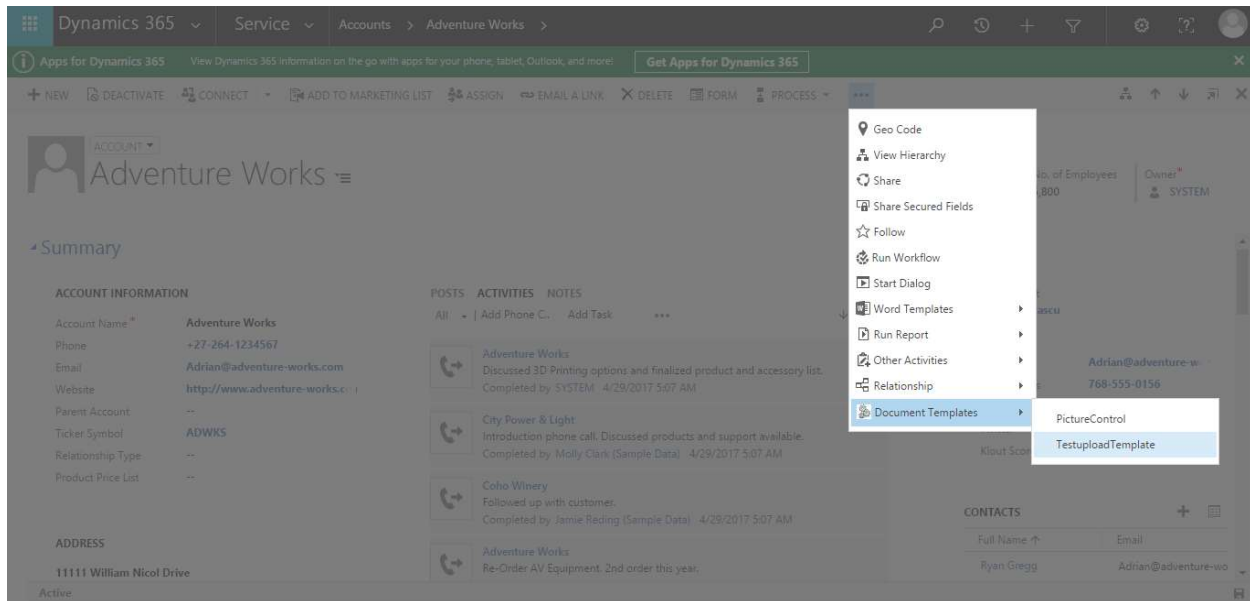
+ NEW DELETE CREATE TEMPLATE UPLOAD TEMPLATE EMAIL A LINK RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA

Active Document Templates

Name	Created On
A2CM2O	5/9/2017 1:54 PM
A2L2OOne2M	5/9/2017 1:25 PM
A2ListRepeater	5/9/2017 2:47 PM
Acc2ContM2O	5/9/2017 2:29 PM
Acc2marM2M	5/9/2017 2:25 PM
PictureControl	5/18/2017 2:15 PM
TestuploadTemplate	5/16/2017 3:24 PM


Merge a template using CRM Word Merge

1. Go to Sales -> Account -> Open an Account Record which you'd like to generate template
2. Click '...' -> DOCUMENT TEMPLATES -> Select Template



- Download and view the merged document:

Account Overview

Name	Adventure Works (sample)		
Address	4405 Balboa Court		
	Santa Cruz		
	U.S.		
Revenue	\$60,000.00		
Website	http://www.adventure-works.com/		
Created on	12/22/2015 10:38 PM		
# of Employee	4,300	Parent Account Name	A. Datum Corporation (sample)
Tel	555-0152		
Primary Contact	Nancy Anderson (sample)		http://www.adatum.com/
Owner	Madhuri Durgam		\$10,000.00
Status	Active		Madhuri Durgam

Related Cases

Case Number	Title	Owner	Case Requestor
CAS-00026-T2F7C9	Need service feature information (sample)	Madhuri Durgam	Adventure Works (sample)
CAS-00020-V1C7F7	Product feature information required (sample)	Madhuri Durgam	Adventure Works (sample)

Marketing Lists (N: N)

List Name	Type	Purpose	CreatedfromCode	ListId
ML1	Static		Account	974e0ebc-64a9-e511-80dd-3863bb2e9b20
ML2	Static		Account	51b897e9-64a9-e511-80dd-3863bb2e9b20

Replace template using CRM Word Merge

- Go to Settings -> Document Template -> Select template
- By clicking on the 'Replace' button on the ribbon the following pop up will appear:

Replace Template

Template Name

Template File No file chosen

3. Provide the new Template Name and Template File then click the "Replace" button.
4. Refresh the CRM View and notice that the Template Name and Template File have been updated.

FAQ

Q. Why does the template become unresponsive when adding attributes from the XML Mapping?

A. This may occur if multiple relationships and many fields are selected in the “Developer” tab. If the document does become unresponsive waiting for some time (for resources to free up) usually results in the document becoming responsive again.

Q. Can repeating control be added to tables in the vertical direction?

A. No. The repeater control will not produce the desired repeating result in a vertical direction. It should be used to create repeating rows only in the horizontal direction.