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.

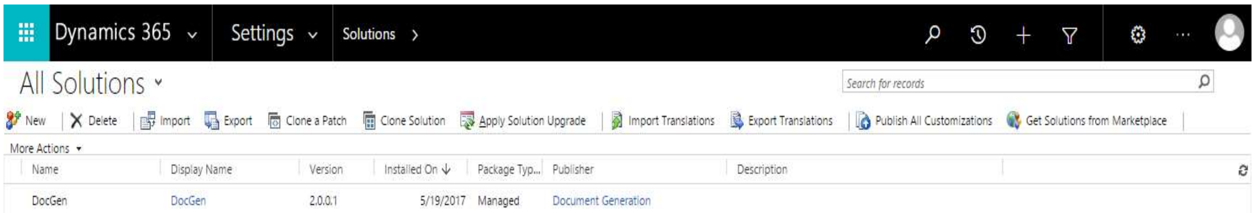
For an example scenario, consider a template based on the account entity. On the account form there are two sub-grids for contact records. Each sub-grid is based on a different, filtered, custom system view (e.g. one for “internal” contacts and the other for “customer” contacts). CRM Word Merge will 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.

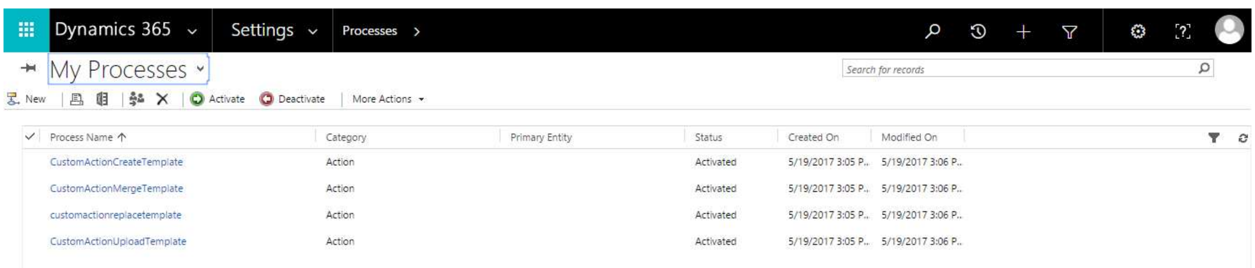
Verify the Solution Installation

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

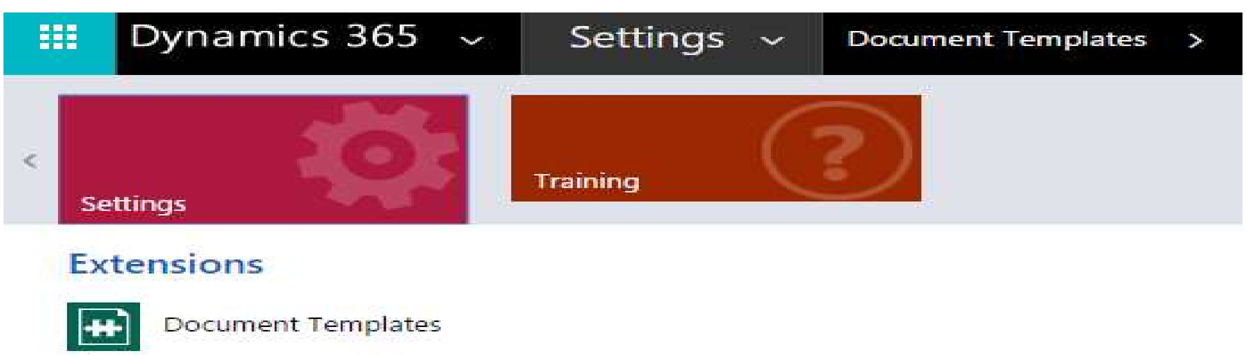
1. CRM Word Merge Solution



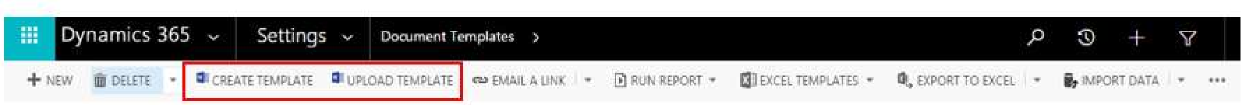
2. Custom Actions for Create, Upload, Replace and Merge templates



3. Document Template entity under Settings | Extensions area.

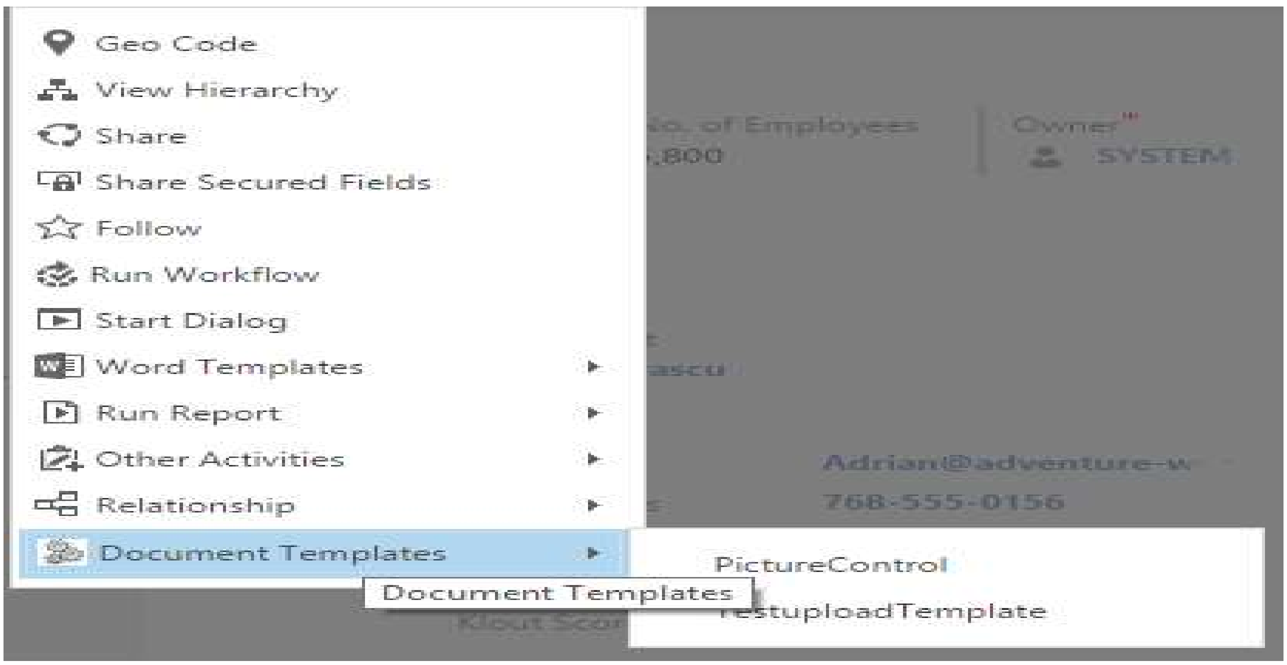


4. Create Template/Upload Template buttons on the Document Template entity ribbon.



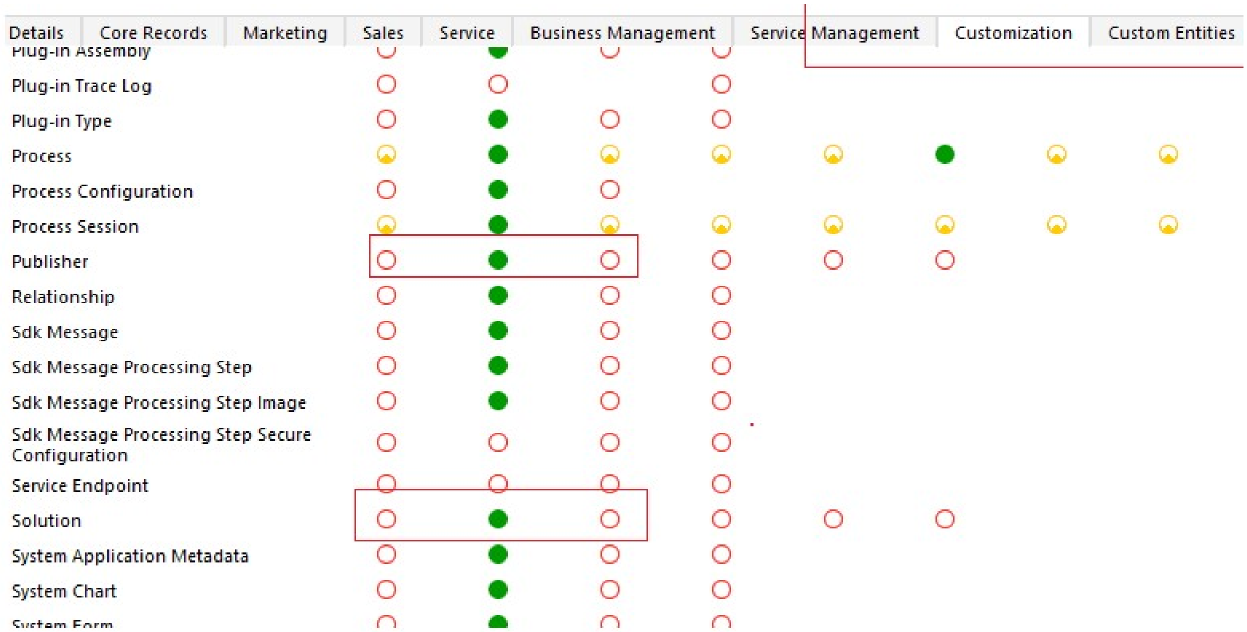
5. “Replace Template” button on uploaded template ribbon:

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.

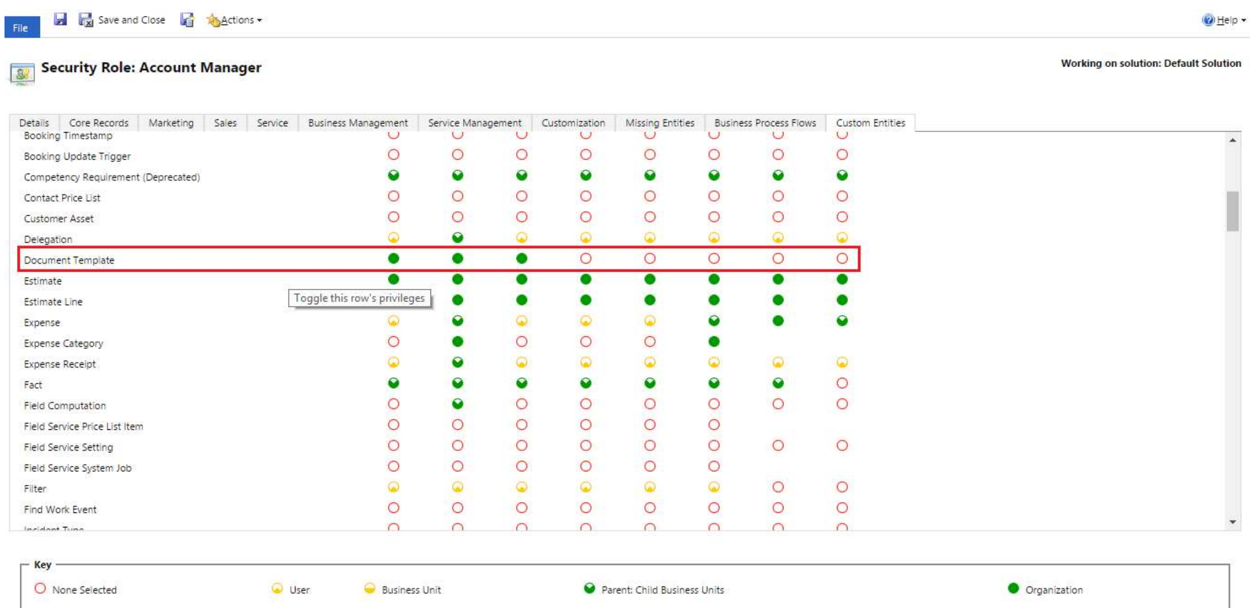


Set User permissions

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.



4. 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.

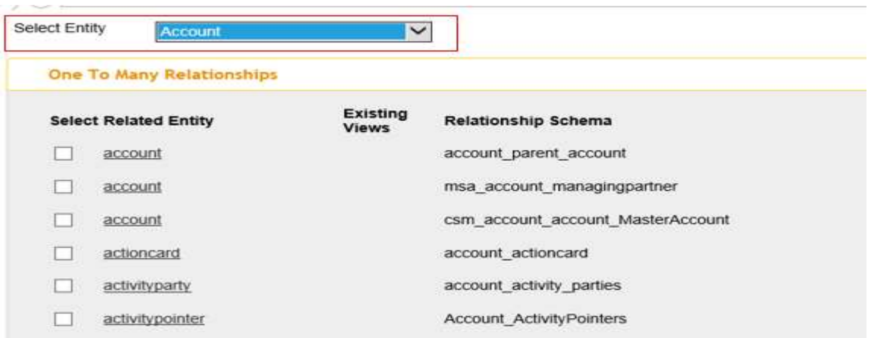


Create template

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

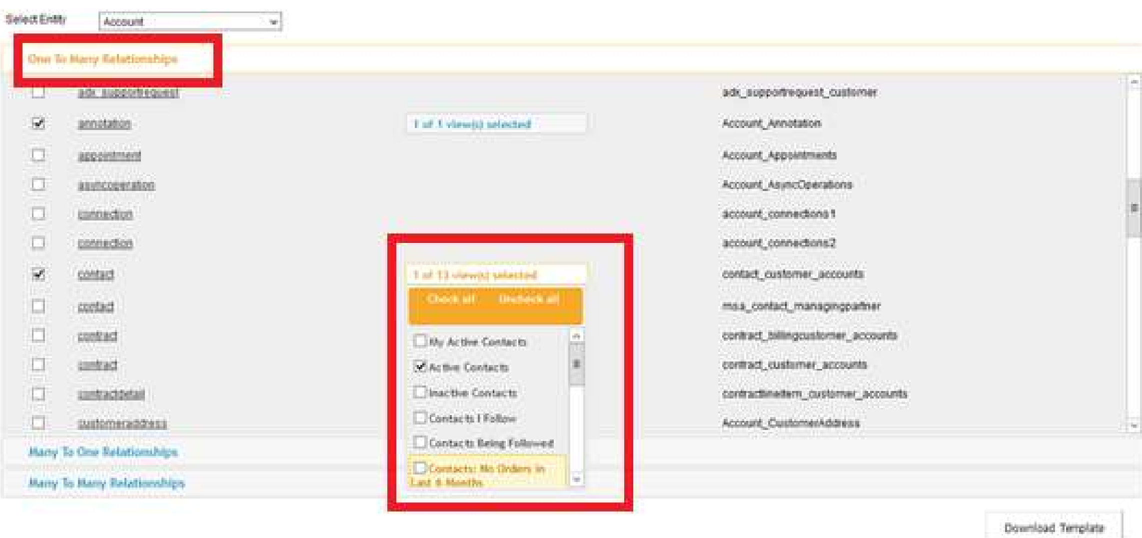
3. Select the entities to be used in the template. As an example, the steps below demonstrate how to add Contacts associated with the Account (One-to-Many) and the Primary Contact for the Account (Many-to-One).

   i. Select the primary entity e.g. Account

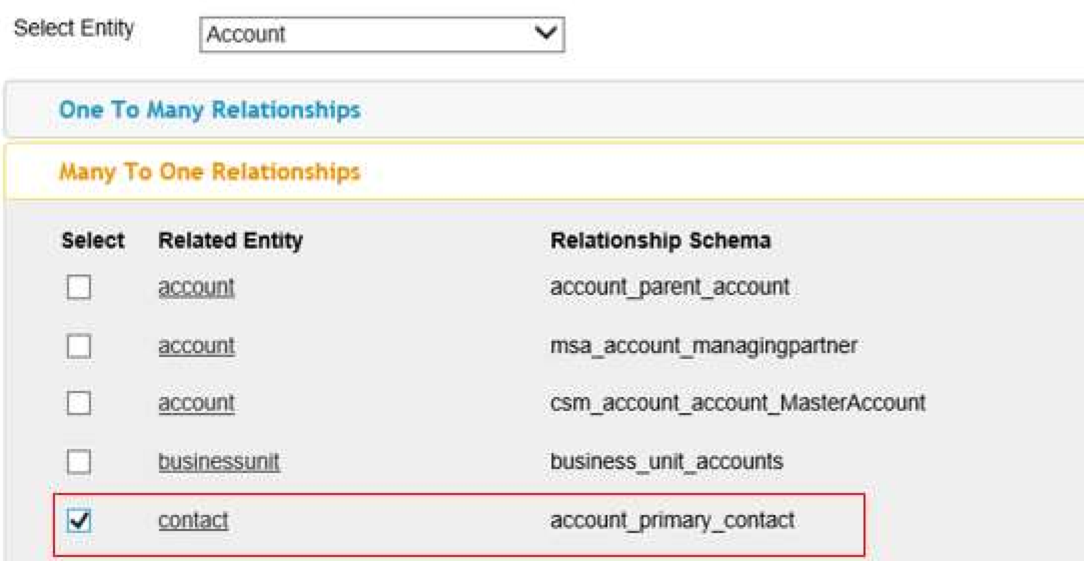


   ii. Choose related entities

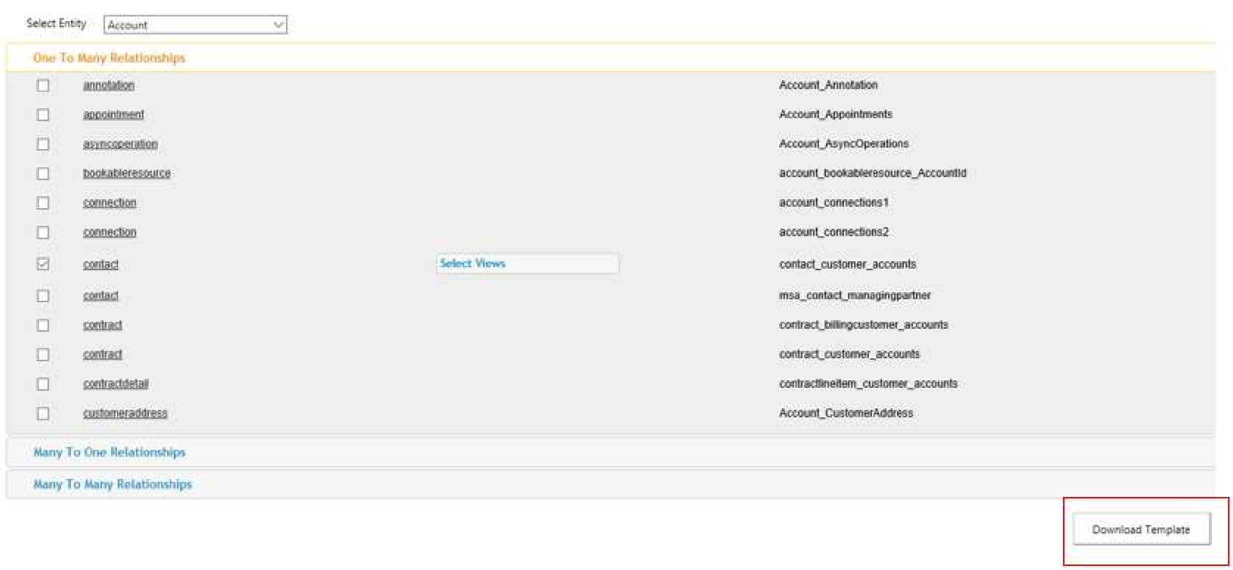
   Under "One-to-Many Relationships" select "Contact" and choose from the list of Contact Views from the dropdown. This will enable the addition of a table in the template to display Contacts related to the Account.



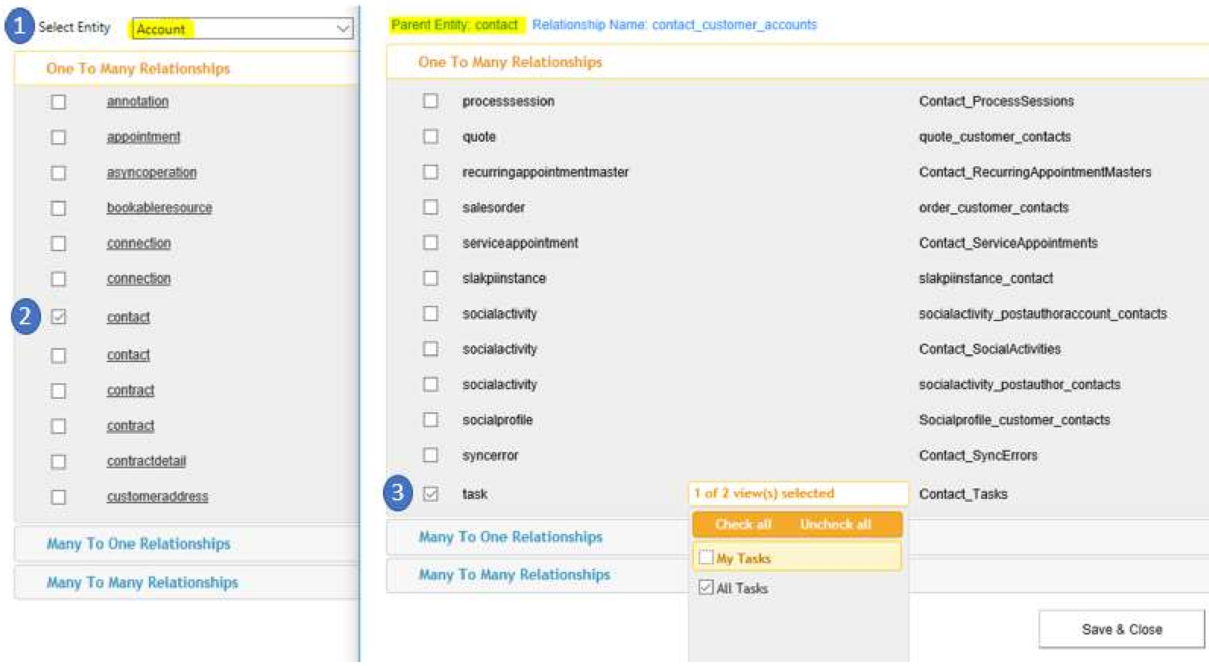
Under "Many-to-One Relationships" select List for Many-to-Many Relationships and select the views from the dropdown. The example below shows the Primary Contact related to the Account:



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



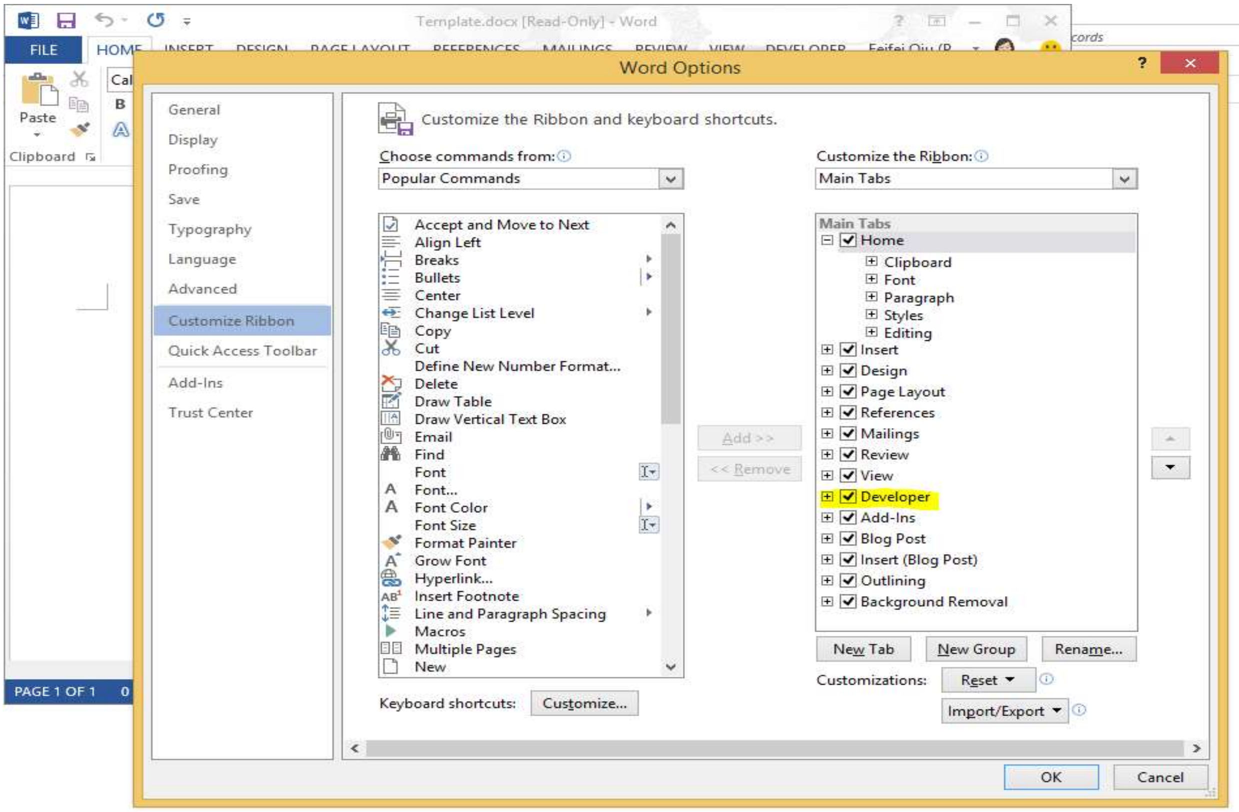
4. It is also possible to select 2nd level relationships for One-to-Many Relationships and Many-to-Many Relationships:
   i. In One-to-Many Relationships, e.g. Account -> Contact, we can select the Contact Entity Relationships by checking the contact entity relationship checkbox and clicking on the hyperlink.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



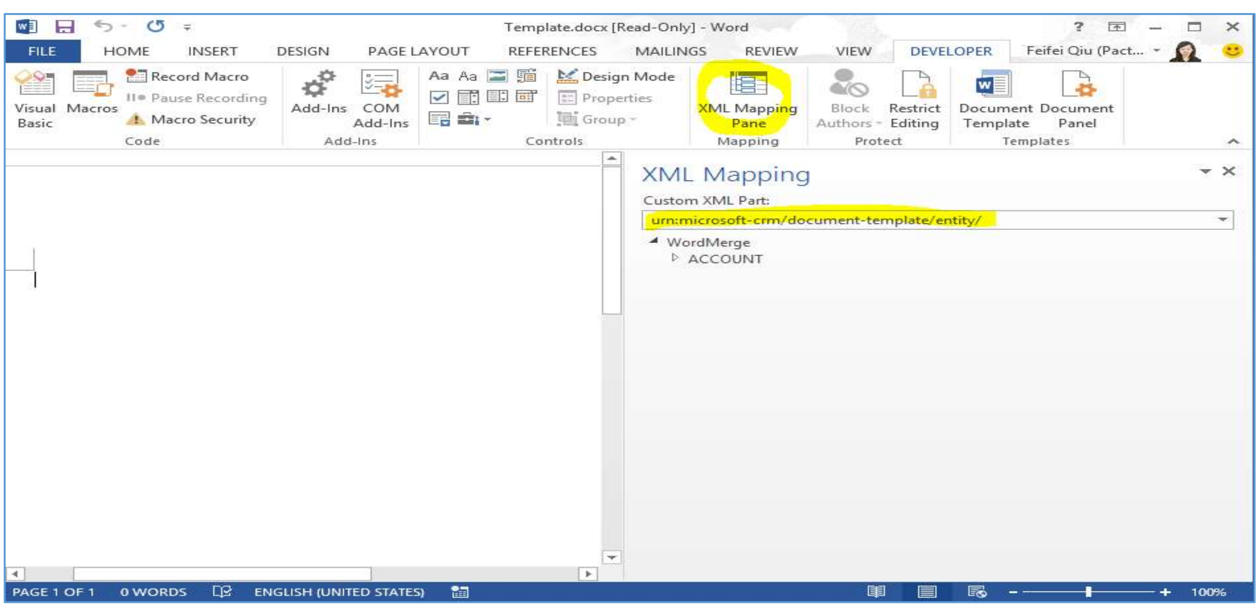
iii. Click 'Download Template'

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

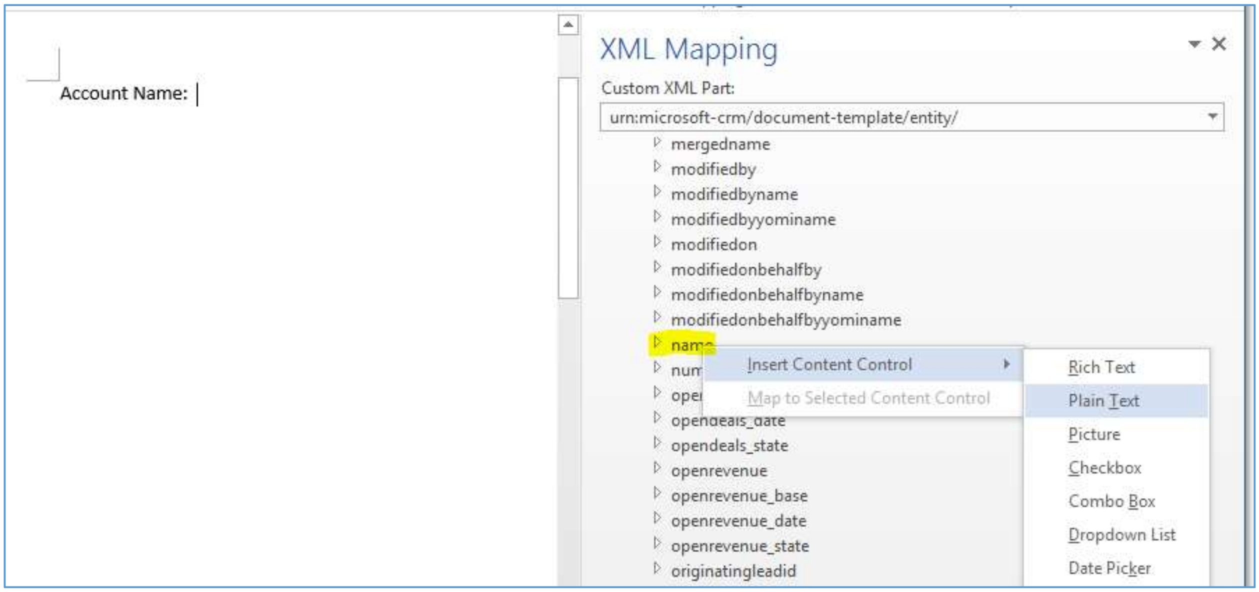


   ii. Navigate to the DEVELOPER tab -> Click 'XML Mapping Pane'-> Select urn:Microsoft-crm/document-template/entity from the dropdown



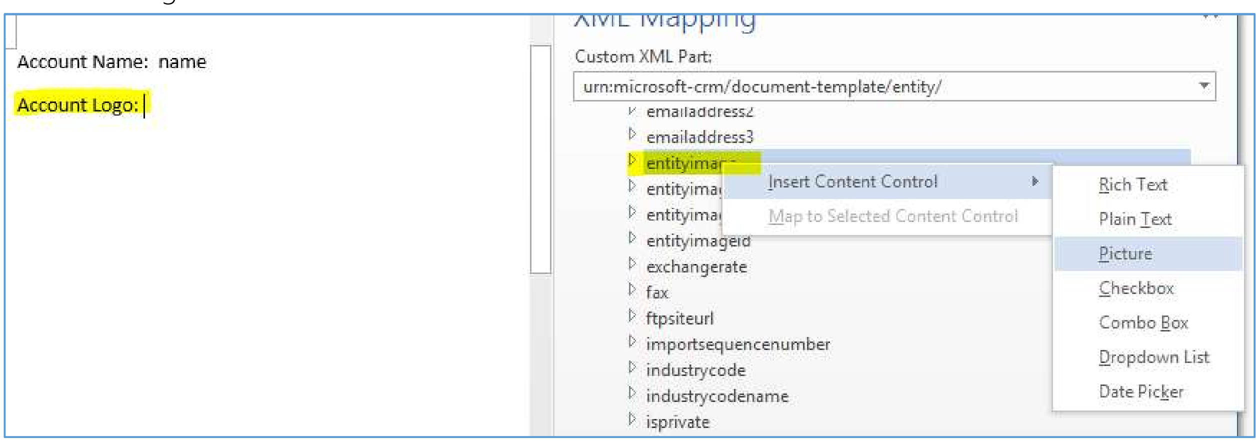
6. Add attributes from the XML Mapping into the template

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

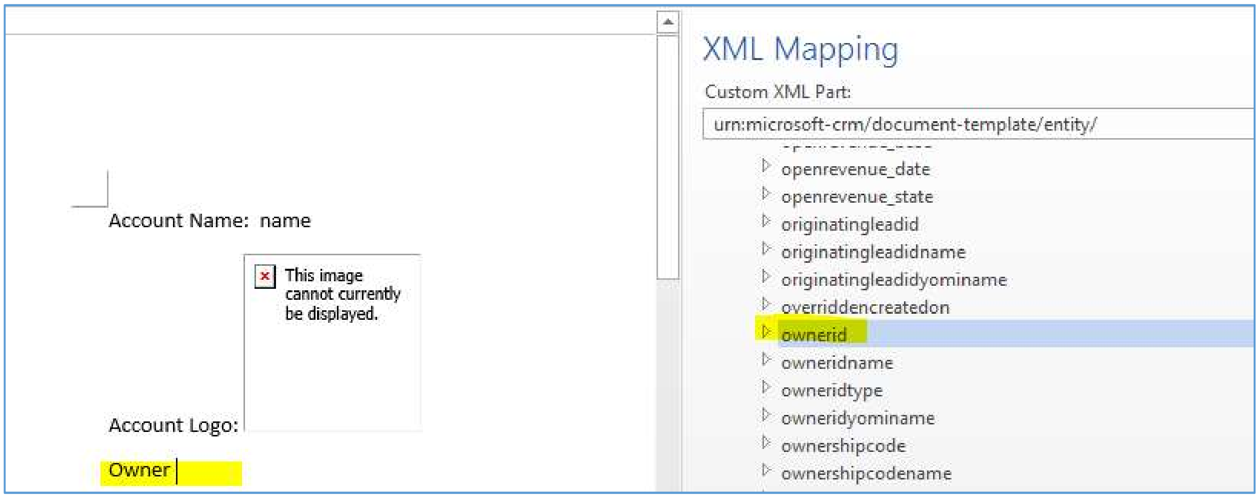


Note: Please refer to the FAQ section for information on avoiding an unresponsive document when adding attributes.

   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

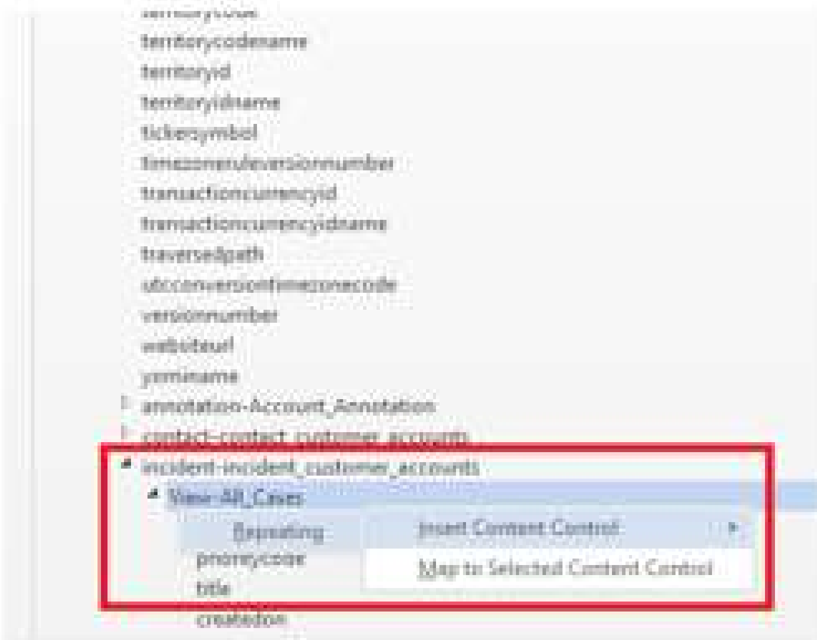
b. Table header is static text, which can be edited to whatever is desired, it is not necessary to use the system field name

c. Use the same approach as described in section 6 above to add these attributes from the XML part


Related Cases

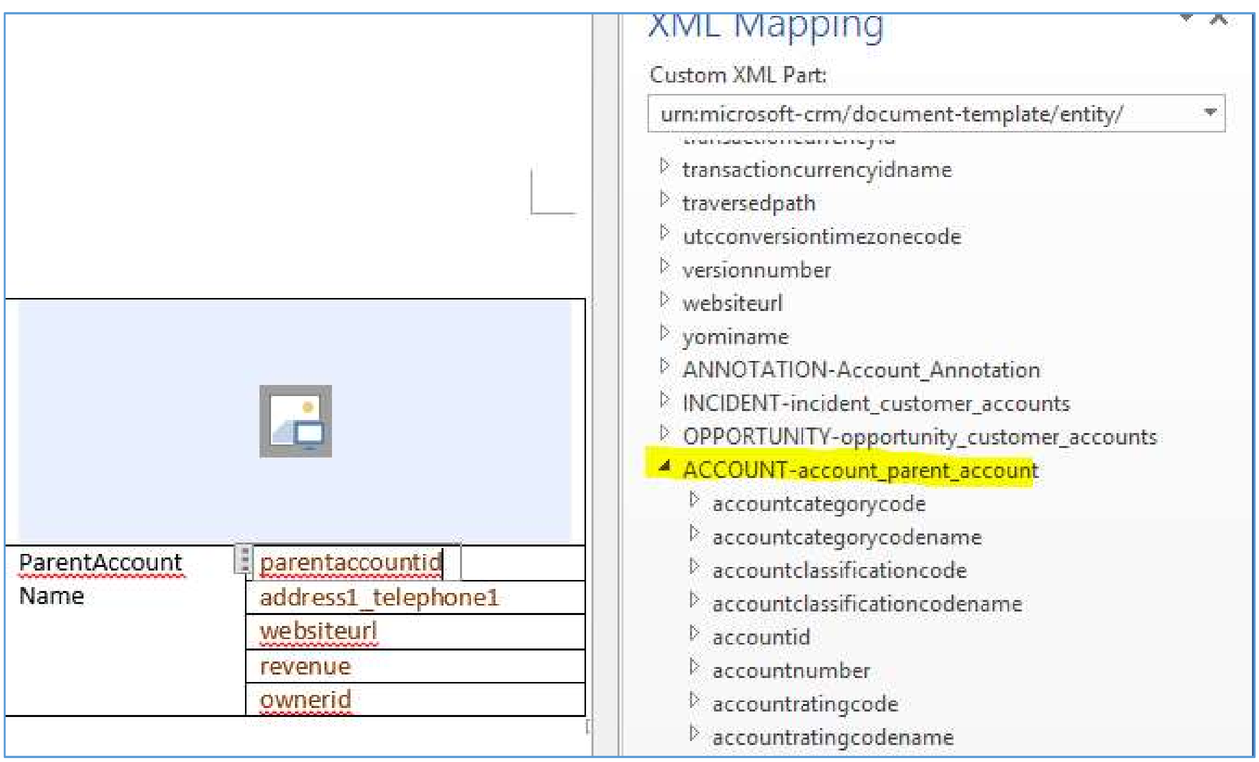
Case Number	Title	Owner	Case Requestor
ticketnumber	title	ownerid	customerid

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.

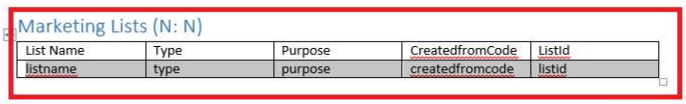


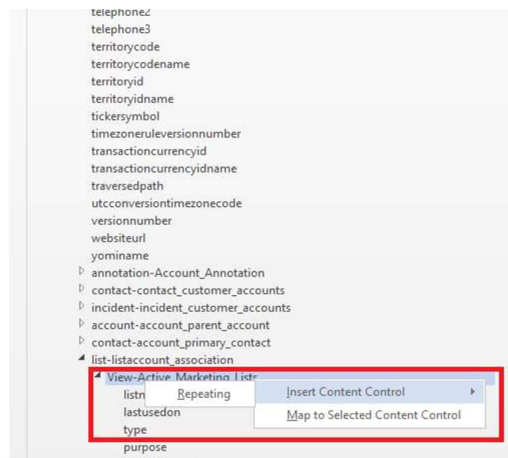
b. Add Many to Many relationship, e.g. Marketing lists, the account is added to: (list-listaccount_association)

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.

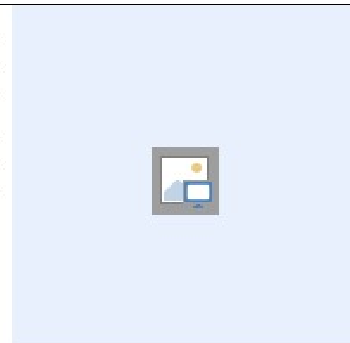




vi. After adding all the desired attributes save the template into a local folder.

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

Account Overview

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

Related Cases

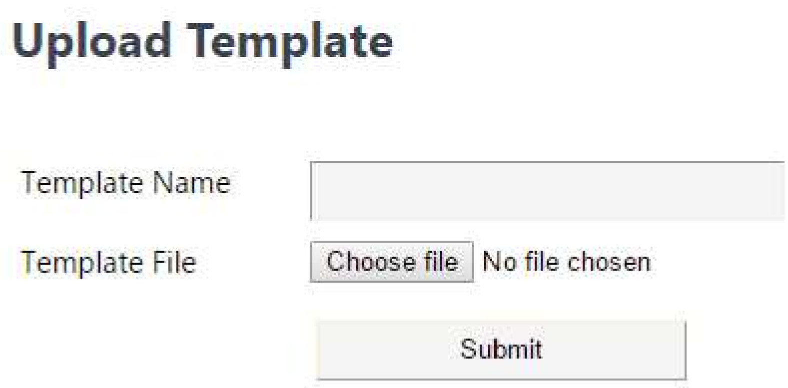
Case Number	Title	Owner	Case Requestor
ticketnumber	title	ownerid	customerid

Marketing Lists (N: N)

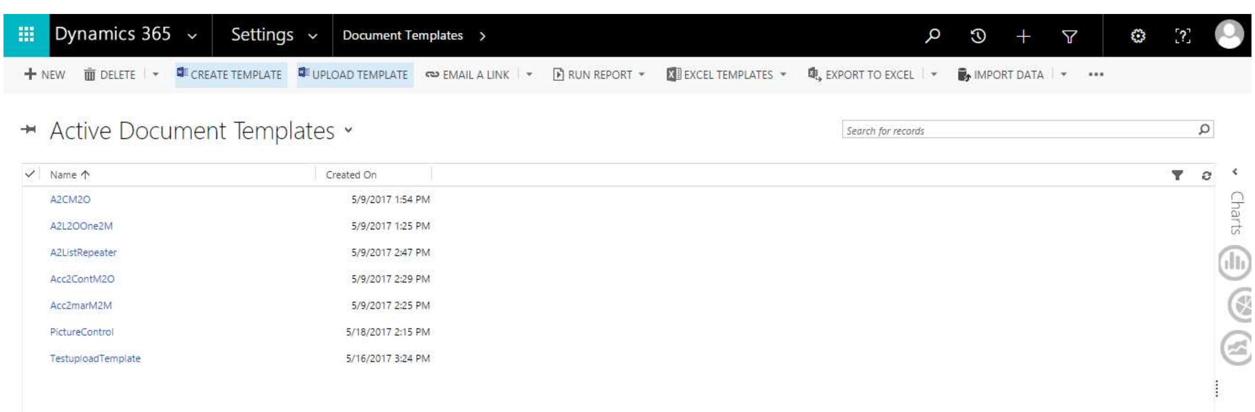
List Name	Type	Purpose	CreatedfromCode	ListId
listname	type	purpose	createdfromcode	listid

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

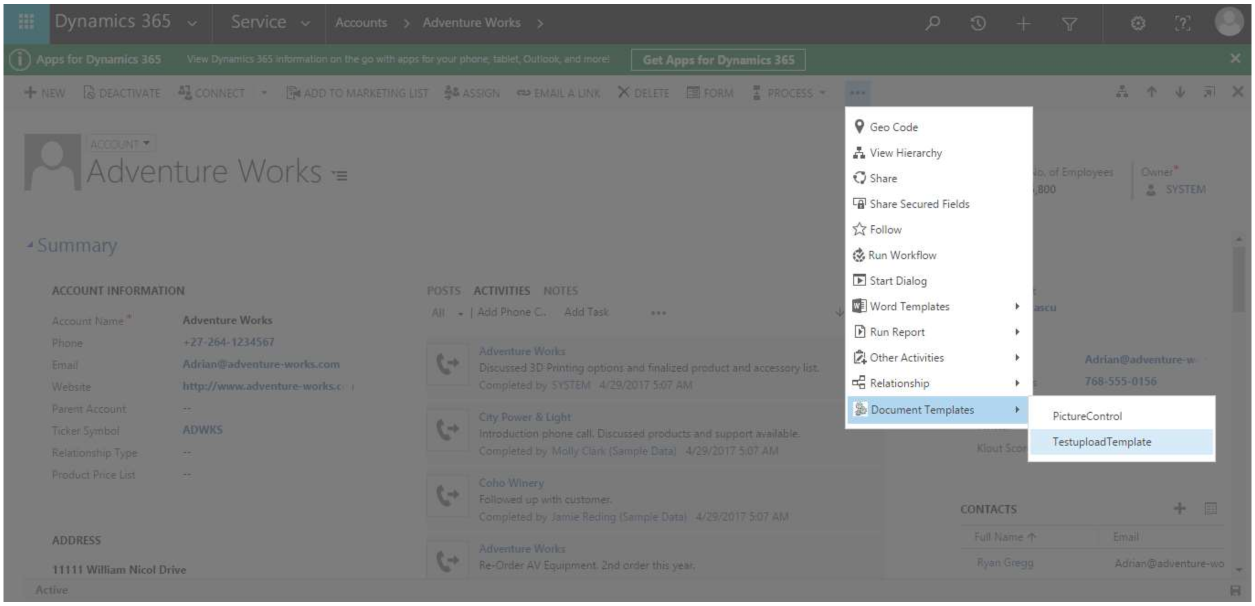


4. Click 'Submit'. The template will be listed under the "Active Document Templates" view.



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



3. 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

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

Replace Template

Template Name

Template File   Choose file No file chosen

Replace

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.