



dox42Dynamics CRM

Documentation

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TABLE OF CONTENTS

Table of Contents	2
What is dox42Dynamics CRM?	3
Installation for the dox42 Office Add-Ins	3
Installation of dox42Dynamics CRM for dox42 Server	5
Data integration with dox42Dynamics CRM	6
Connection to MS Dynamics CRM or Dynamics 365 for Sales	6
Azure Active Directory Connection with Dynamics 365.....	6
Read Data from MS Dynamics CRM or Dynamics 365 for Sales.....	8
How to get a full list of your fields and entities	9
Support	10

What is dox42Dynamics CRM?

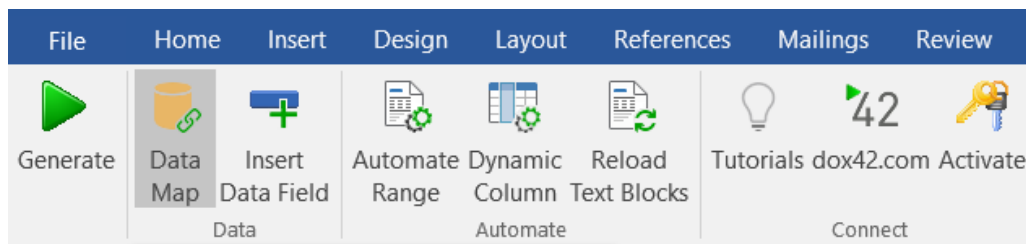
The dox42Dynamics CRM data source enables you to use CRM-data for document automation. What is more, multiple data sources can be integrated into one document at the same time.

dox42Dynamics CRM is a supplementary package for dox42. dox42Dynamics CRM is a dox42 Custom Data Source.

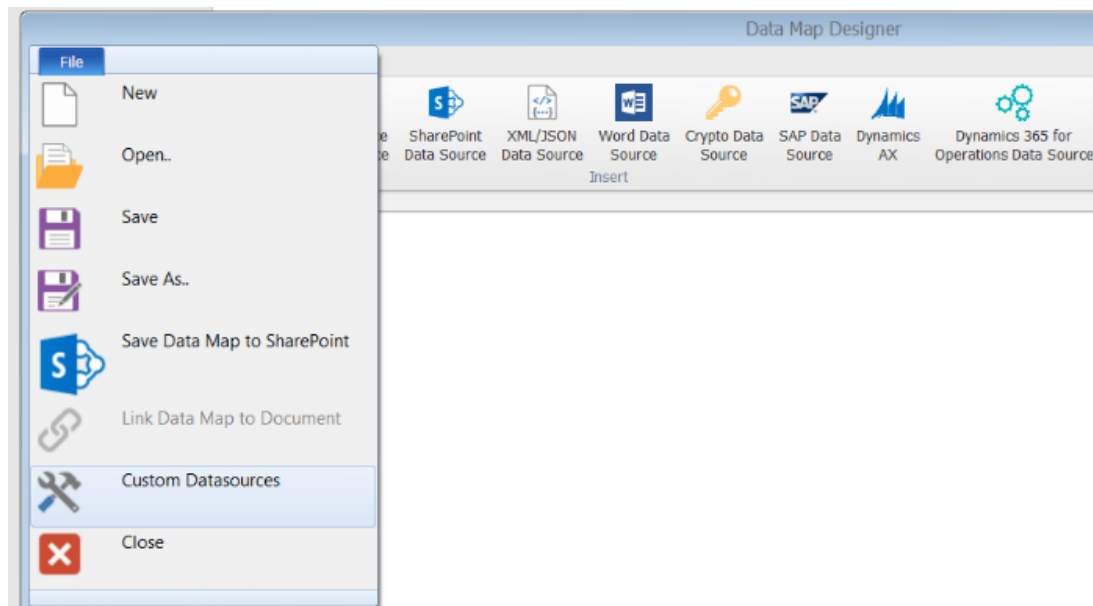
Installation for the dox42 Office Add-Ins

Save the dox42Dynamics CRM files to a fixed directory on the computer, on which you want to use dox42. To do that, just unzip the file **dox42DynamicsCRM_V*.zip**.

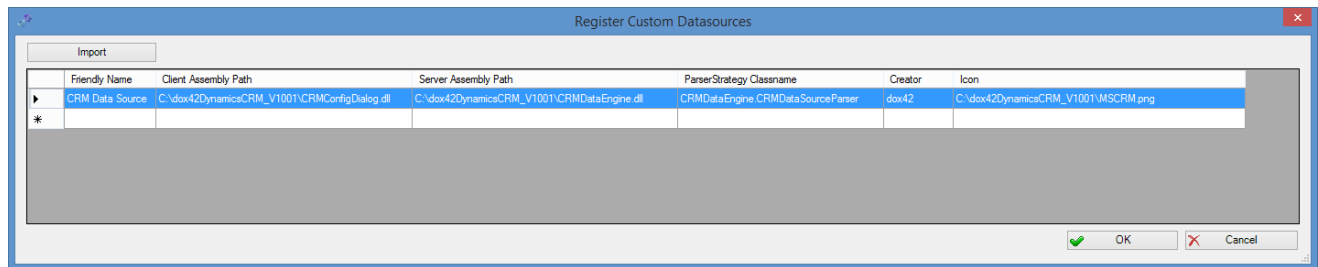
Start Word/Excel, activate the dox42-Ribbon and select „**Data Map**“.



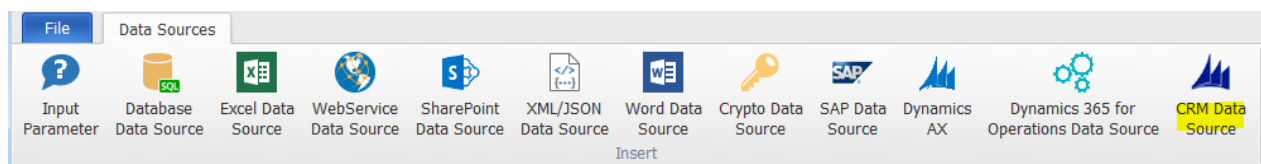
In the Data Map Designer select „**Data Map**“. Open the File-Menu and select „**Custom Datasources**“.



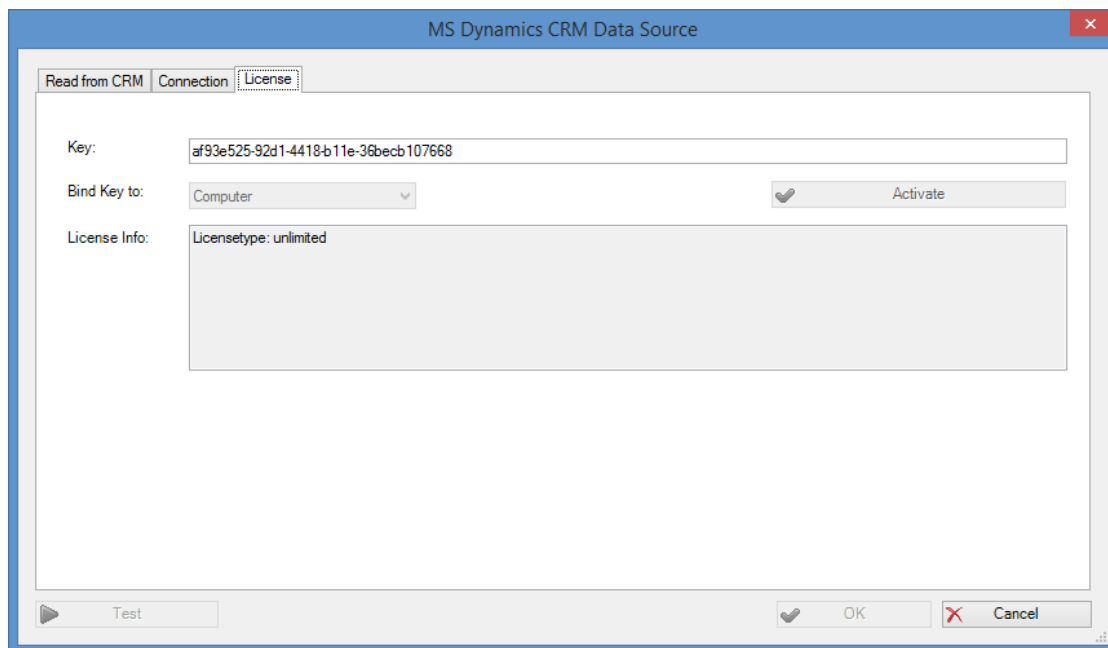
In the dialogue „**Register Custom Datasources**“, you can import the Import Configuration (**dox42DynamicsCRMImport.config**).



Now, the dox42 Dynamics CRM Data Source is ready for use as any other dox42 data source.



Now you need to activate your license key. To do that, simply select your CRM Data Source, open the configuration dialogue and move to the register **“License”**. Insert your license key here and click **“Activate”**.



In case you get the error: Microsoft.IdentityModel could not be found, please make sure that Windows Identity Foundation is installed on your machine.

You can activate Windows Identity Foundation via the Control Panel > Turn Windows Features on or off > Tick the box at “Windows Identity Foundation 3.5”.

Also you need .NET Framework 4.5.2 or higher installed.

Installation of dox42Dynamics CRM for dox42 Server

In order to use dox42Dynamics CRM on the dox42 Server, please copy the following assemblies to the /Bin directory of your Server:

- ✓ CRMDDataEngine.dll
- ✓ CRMLicence.dll
- ✓ Microsoft.Crm.Sdk.Proxy.dll
- ✓ Microsoft.Xrm.Sdk.dll

You need .NET Framework 4.5.2 or higher installed on the server.

Now dox42Dynamics CRM Data Source has to be registered in the **web.config** of your server.

```
<customDataSources>
  <add key="CRMDDataEngine.CRMDataSourceParser"
    value="CRM Data Source;c:\dox42Server\bin\CRMDDataEngine.dll;" />
</customDataSources>
```

Furthermore, please insert the license key in the **web.config**:

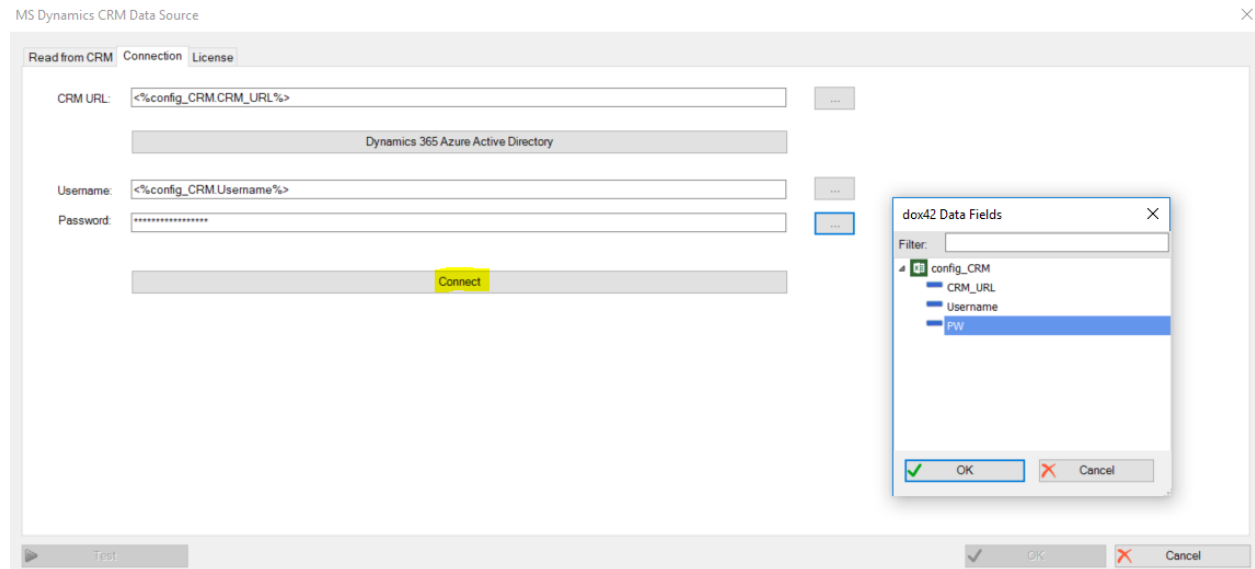
```
<appSettings>
  <add key="LicenseFilePath" value="c:\dox42Server\License" />
  <add key="LicenseKey" value="..." />
  <add key="dox42CRMLicenseKey" value="..." />
  ...
</appSettings>
```

Also have a look at the dox42 Server Documentation: <http://www.dox42.com/Modules/dox42-Server>.

Data integration with dox42Dynamics CRM

Connection to MS Dynamics CRM or Dynamics 365 for Sales

Configure the connection to CRM in the register **“Connection”**. You can define data fields of any other data source for every value. This way, you could keep the configuration for example in an Excel or XML file. Of course, you can simply enter the values as well.



If you connect to MS CRM online (MS Dynamics 365 for Sales), then your CRM URL would look similar to:
<https://<Yourcompany>.crm4.dynamics.com>

You can also connect to MS CRM 2011, 2013, 2015, 2016 on-premises.

The dox42 Dynamics CRM Data Source will call the XRMService.

Azure Active Directory Connection with Dynamics 365

Configure the Azure Active Directory connection to CRM in the register **“Connection”**.

Click on **“Dynamics 365 Azure Active Directory”** and follow the steps given in

[dox42_AzureActiveDirectory_Integration.pdf](#).

You find the documentation for the Azure Active Directory Integration in your download package.

Please see **“Documentation/dox42_AzureActiveDirectory_Integration.pdf”**.

MS Dynamics CRM Data Source

Read from CRM Connection License

CRM URL:

Dynamics 365 Azure Active Directory

Username:

Password:

Azure Active Directory Configuration

Office 365 or Dynamics 365 URL:

Azure Tenant:

dox42 Add-Ins

Azure AD Application ID:

Redirect URL:

dox42 Server

Azure AD Application ID:

Redirect URL:

Client Key:

☐ Show

Consent for dox42 Server

OK Cancel

Please find detailed instructions for the AAD connection in the documentation folder of your download package here: [dox42_AzureActiveDirectory_Integration.pdf](#)

Read Data from MS Dynamics CRM or Dynamics 365 for Sales

MS Dynamics CRM Data Source

Read from CRM Connection License

Name:

Entity:

Data Fields:

Field List Filter: ☐ Show Selected Only

Read Field?	Field	Label	Filter	Filter Value	Filter Data Field	Field Type
<input type="checkbox"/>	accountcategorycode					
<input type="checkbox"/>	accountcategorycodename					
<input type="checkbox"/>	accountclassificationcode					
<input type="checkbox"/>	accountclassificationcodename					
<input checked="" type="checkbox"/>	accountid		*		SalesQuote.customerid	
<input type="checkbox"/>	accountnumber					
<input type="checkbox"/>	accountratingcode					
<input type="checkbox"/>	accountratingcodename					
<input type="checkbox"/>	address1_addressid					
<input type="checkbox"/>	address1_addressstypecode					
<input type="checkbox"/>	address1_addressstypename					

☐ Date/Time Fields in Local Time (instead of UTC) ☐ Use Labels (dox42 3.6 or higher required)

dox42 Data Fields

Filter:

- WhichQuote
- Connection
- SalesQuote_Input
- SalesQuote
 - Customerid
 - Description
 - DiscountAmount
 - DiscountPercentage
 - EffectiveFrom
 - EffectiveTo

Press “Connect” to read the list of available entities from your CRM. Select the desired entity in the dropdown “Entity” and tick the desired fields in the list.

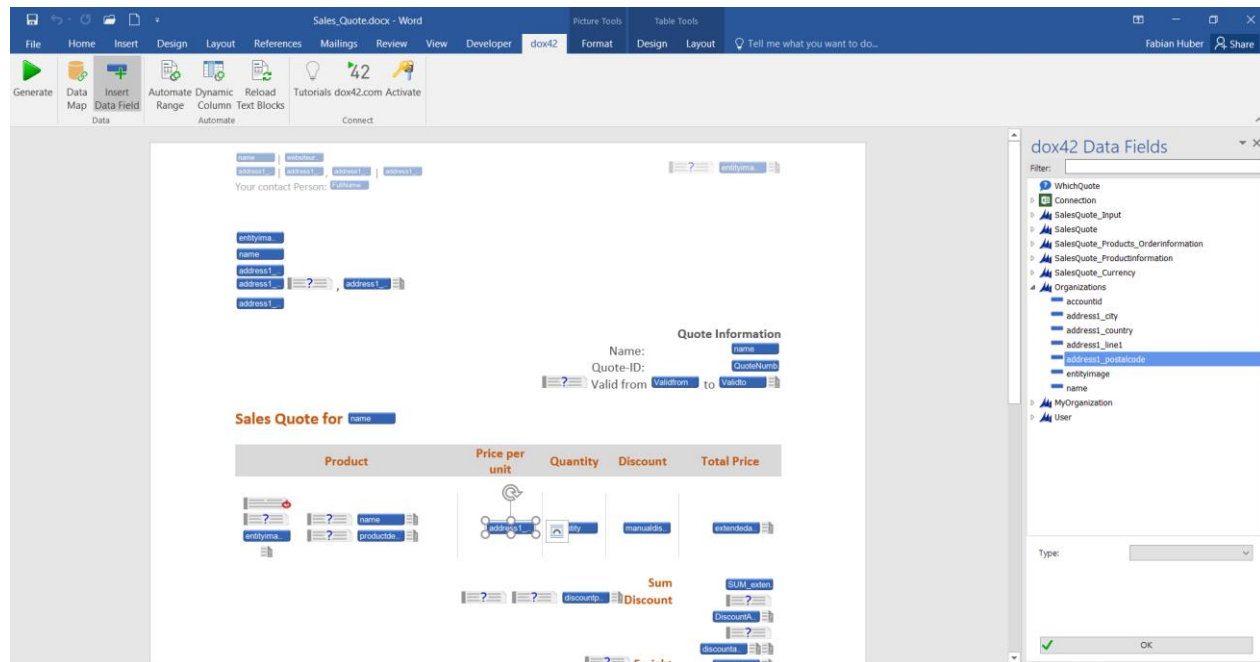
To set a filter just enter a value or choose a data field and choose the desired filter.

Dynamics CRM stores data/time fields in UTC. To transform all date/time fields to local time check “Date/Time Fields in Local Time (instead of UTC)”.

To get the CRM Labels as mouse-over tooltip in the dox42 data field explorer check “Use Labels.” You need dox42 version 3.6 or higher to use this function.

You may overwrite the labels adding you own comments. Also you can always refresh the labels and reload the fields from CRM by clicking “Refresh Labels and Fields”.

Now you can use data fields from MS Dynamics CRM like any other dox42 data fields.



How to get a full list of your fields and entities

The dox42 Dynamics CRM Data Source reads the field and entity names from MS Dynamics CRM. As there can be differences between the field name and the display name (e.g. because of language settings) we recommend you to work with the field and entity list given from MS Dynamics CRM. To get this list of field and entity names please do the following (for MS CRM Online, MS CRM 2013 and 2015 on-premises):

1. On the navigation bar click **Microsoft Dynamics CRM > Settings**.
2. Again on the navigation bar click **Settings > Customizations > Customize the System**.
3. To get the entity name:
 1. In the new window under **Components**, expand **Entities** and from this full list click on the entity you want.
 2. The next view contains the name and the display name of the entity.
4. To get the field name:
 1. In the new window under **Components**, expand **Entities** and from this full list expand the entity you want.
 2. Click **Fields** to get the list which contains names and display names.

Support

Should you have any questions, please do not hesitate to contact support@dox42.com. We are happy to help you!

Good luck with dox42!

Your dox42 Team