



CRM Sales PDF Productivity Pack Configuration and User Guide Microsoft Dynamics CRM 4.0

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Introduction

Document Overview.

This document details the steps required to install and configure CRM Sales PDF Productivity Pack for Microsoft Dynamics CRM 4.

Version Compatibility.

CRM Sales PDF Productivity Pack is designed to be run within a Microsoft Dynamics CRM 4 environment and this document assumes that a CRM 4 environment is being used. For details on other version compatibility please email info@crmaddins.co.uk.

Full support of all versions of MSCRM 4 (Workgroup/Professional and Enterprise), both 32 and 64 bit deployments.

CRM Sales PDF Productivity Pack for Microsoft Dynamics CRM 4.0.

PDF Creation. CRM Sales PDF Productivity Pack is an integrated Addin module that allows you to easily produce, print and email quotes, orders and invoice documents from within Microsoft Dynamics CRM.

- You can quickly preview what you PDF document will look like
- You can save time by printing directly from the document preview
- You can email documents directly to a client using templates and have a record of the email automatically saved in CRM



Configuring CRM Sales PDF Productivity Pack

Pre-requisites.

- Installation has been completed
- The user doing the configuration has been assigned the CRM Customizer or Administrator role within CRM
- The users utilising Sales PDF Productivity pack have PDF viewing software installed and configured on their workstation/PC.

Setting up CRM Sales PDF Productivity Pack.

Setting CRM Sales PDF Productivity Pack in the Quote/Order and Invoice records.

1. Open CRM and go to the settings area of the system.



2. Select the SPPDF entity and open it for editing and make sure that that the settings match those shown below, save and publish if any changes have been required.



The screenshot shows the 'Entity: SPPDFSettings' configuration page in Internet Explorer. The page is titled 'Entity: SPPDFSettings - Windows Internet Explorer'. The main content area is titled 'SPPDFSettings Information'. On the left, there is a 'Details' sidebar with a tree view containing 'Information', 'Forms and Views', 'Attributes', '1:N Relationships', 'N:1 Relationships', and 'N:N Relationships'. The main content area has two tabs: 'General' and 'Primary Attribute', with 'General' selected. The 'Entity Definition' section contains the following fields:

- Display Name *: SPPDFSettings
- Plural Name *: SPPDFSettings
- Ownership *: User
- Name *: xrm_sppdfsetup
- Description: Sales PDF Productivity Pack CRMAddins.co.uk

The 'Offline Availability' section has a checkbox for 'Show in Microsoft Dynamics CRM for Microsoft Office Outlook when offline' which is unchecked. The 'Duplicate Detection' section has a checkbox for 'Enable duplicate detection' which is unchecked. The 'Relationships' section has a note: 'These relationships may only be defined when a Custom Entity is created.' and two checkboxes: 'Note (includes attachments)' and 'Activities', both of which are unchecked. The 'Areas that display this entity' section has several checkboxes: 'Workplace', 'Sales', 'Marketing', 'Service', 'Settings' (checked), and 'Resource Center', 'Audit Settings' (unchecked).

3. Select customise Entities and select the entity that you wish to add the Sales PDF Productivity Pack to, in this example we will use the quote record.

Select to edit the Forms and Views.



The screenshot shows the 'Entity: Quote - Windows Internet Explorer' interface. The 'Forms and Views' section is active, displaying a table of various forms and views for the Quote entity. The table has columns for Name, Type, and Description. The 'Form' entry is highlighted, with a description of 'The main application form.'.

Name	Type	Description
Active Quotes	Public View	
All Quotes	Public View	
Form	Form	The main application form.
My Quotes	Default Public View	
Preview	Preview	This is used to quickly preview record data right
Quick Find All Quotes	Quick Find View	
Quote Advanced Find View	Advanced Find View	
Quote Associated View	Associated View	Displays information about quotes in the detail
Quote Lookup View	Lookup View	

4. Open the Form that has a description The main application form.



Form: Quote - Windows Internet Explorer

Form
Quote

General Shipping Addresses Administration Notes

Quote Information

Quote ID * Revision ID *
Name *
Potential Customer * Currency *
Price List *

Totals

Detail Amount
Quote Discount (%)
Quote Discount
Pre-Freight Amount
Freight Amount
Total Tax
Total Amount

Common Tasks

- Add a Tab
- Add a Section
- Add Fields
- Add an IFRAME
- Change Properties
- Remove
- Form Properties

5. Select the option to add a new Tab, and call the Tab "Sales PDF Productivity Pack".

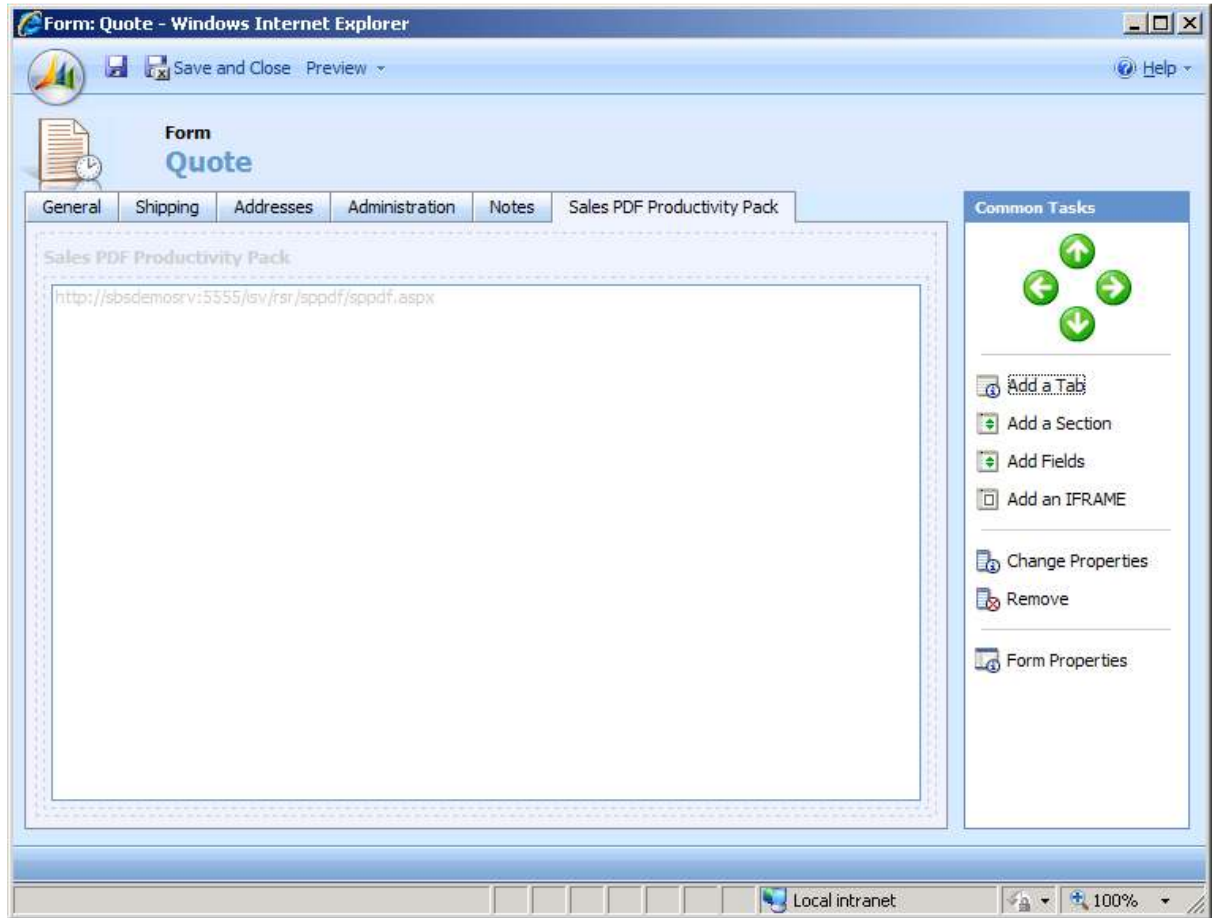
Add a Tab -- Webpage Dialog

Add a Tab
Add a new tab to the form.

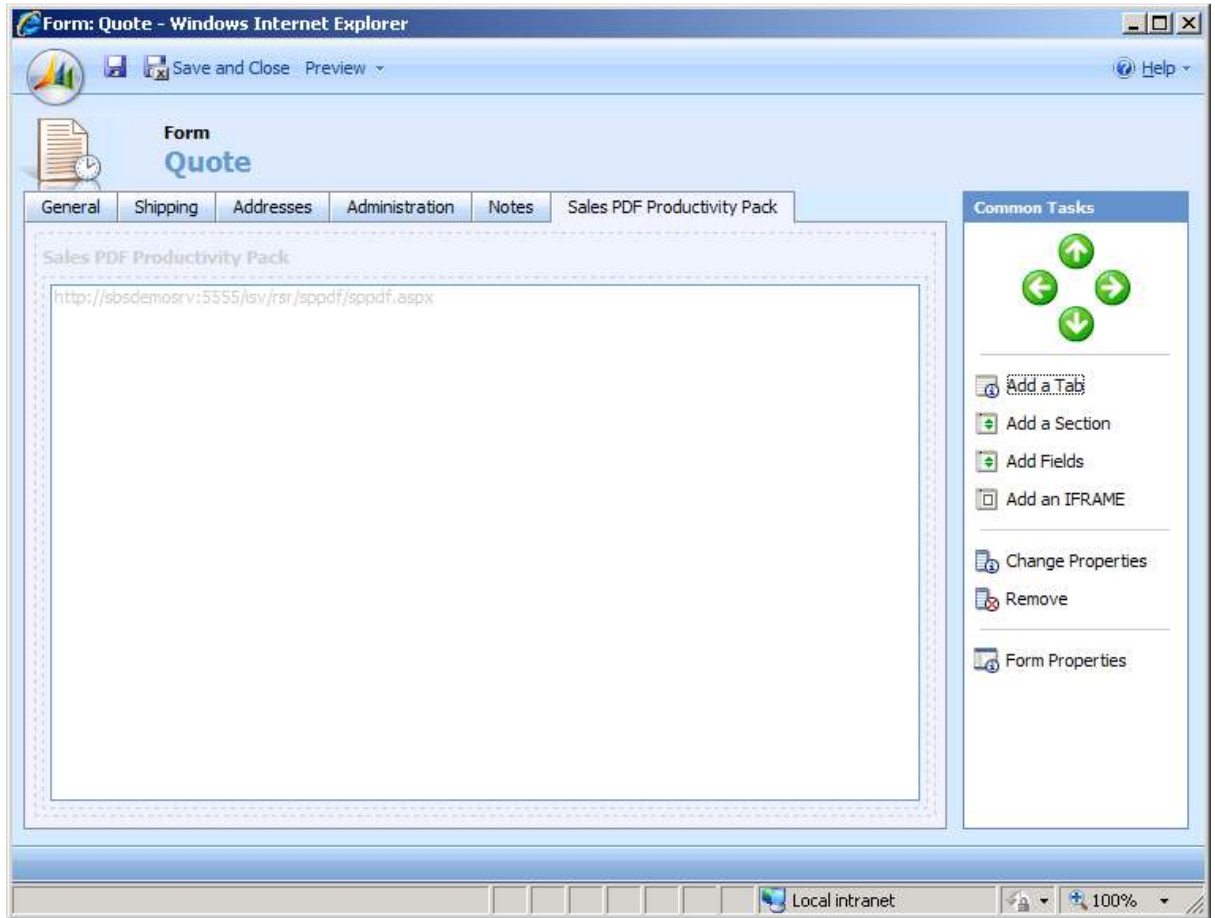
Name * Sales PDF Productivity Pack

OK Cancel

http://localhost:5555/DemoCompar Local intranet



6. Add a section Named Sales PDF Productivity Pack.



7. Add an IFRAME and name it "IFRAME_xpdf" configured as shown below, replacing the name of the server "sbsdemosrv:5555" in the example with the name of your CRM server and port number as required.



IFRAME Properties -- Webpage Dialog

IFRAME Properties
Modify this IFRAME's properties.

General Formatting Dependencies

Name
Specify a unique name.

Name * IFRAME_xpdf

URL * http://sbsdemosrv:5555/!sv/rsr/sppdf/sppdf.aspx

Pass record object-type code and unique identifier as parameters.

Label
Specify the label for this field in forms.

Label _____

Display label on the form

Security
Select whether to restrict cross-frame scripting.

Restrict cross-frame scripting

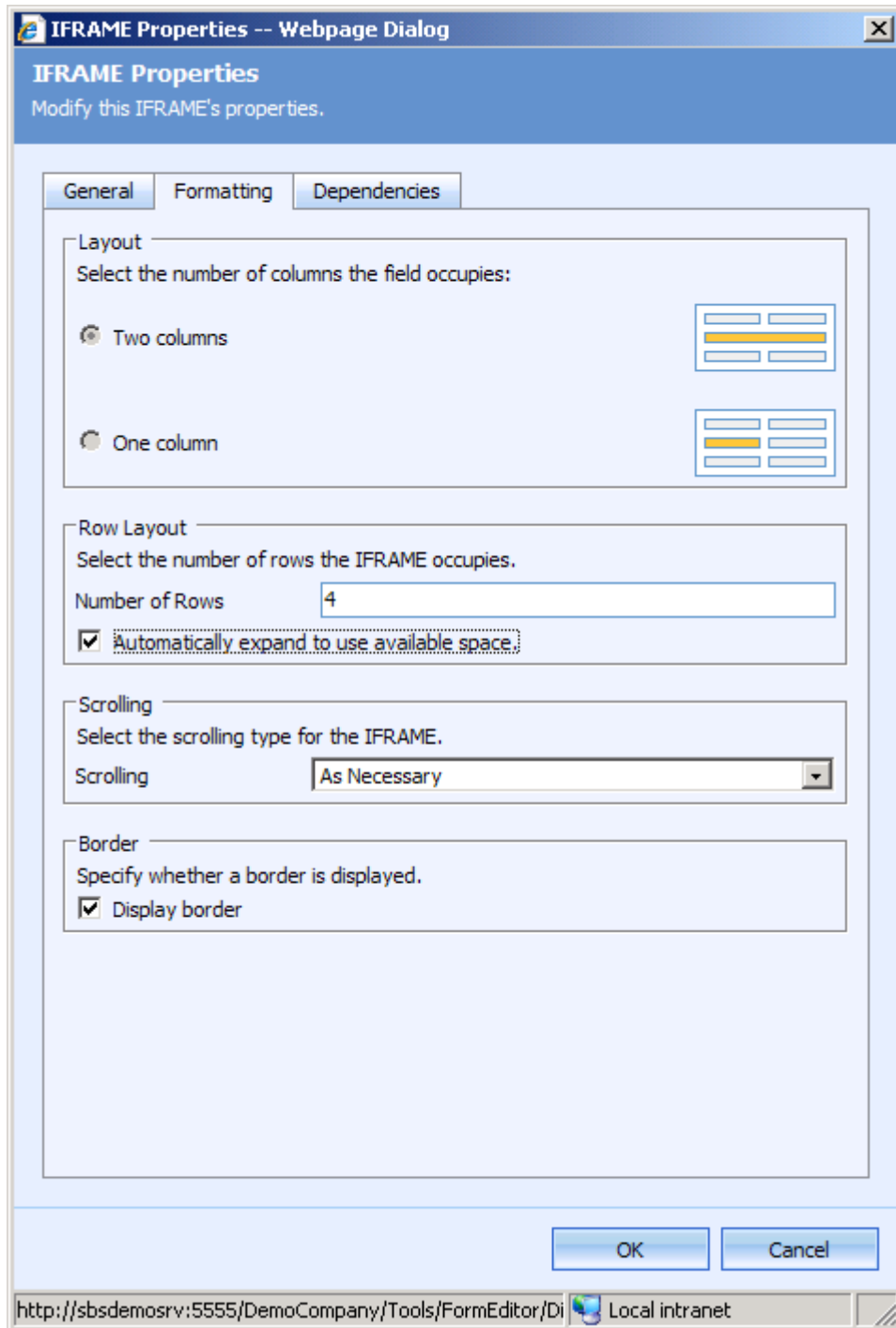
Location
Select the tab and section for this IFRAME to appear under.

Tab Sales PDF Productivity Pack

Section Sales PDF Productivity Pack

OK Cancel

http://sbsdemosrv:5555/DemoCompany/Tools/FormEditor/Di Local intranet



8. Save the changes and publish them as normal.
9. Next go to the settings area and open the SPPDFSettings and create a new record giving it the name of "Default".

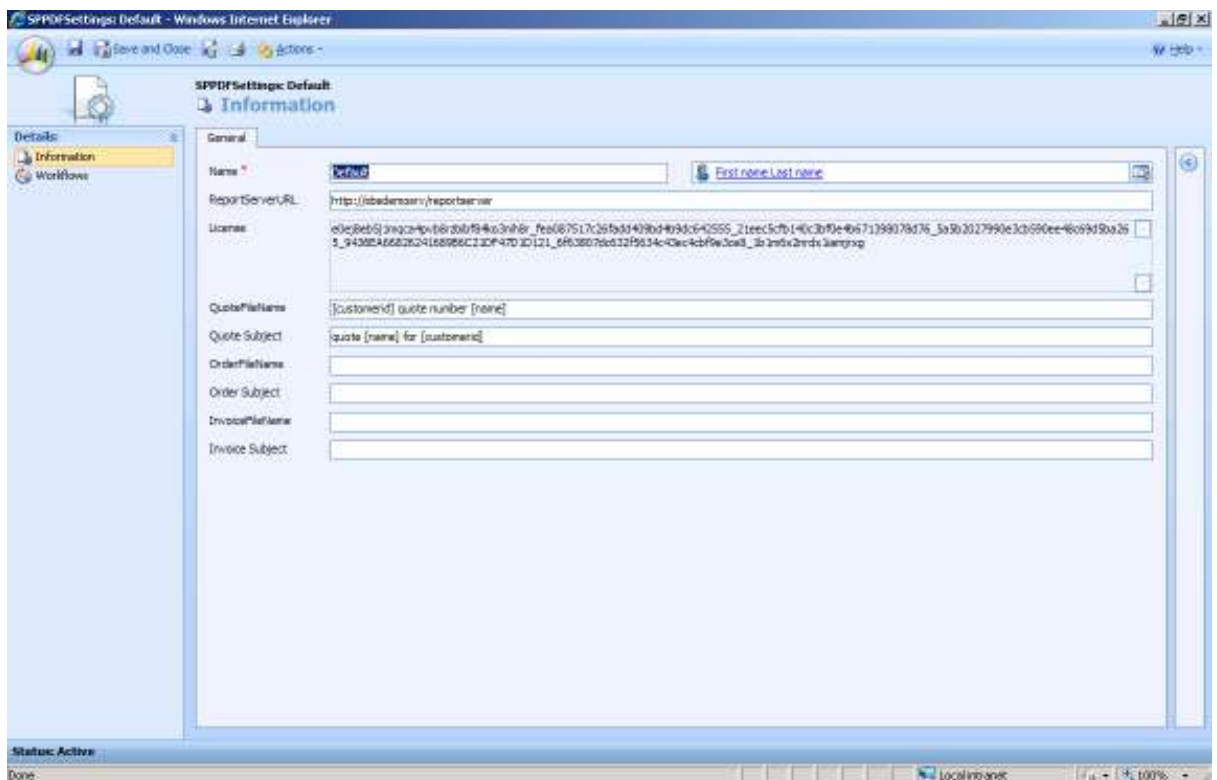
Completing information for the names of the PDF files, the default subject name for the automated emails.



Naming and subjects can contain a mixture of typed text or data from fields in the data base, you will need to know that database field name for the database fields that you wish to use.

In the example below the Quote File Name is a combination of the “potential customer” and the “quote name” for the option to save a file and the “quote name” and “customer name” for sending the quote as an email.

The naming conventions can be a mixture of free text and database fields.



10. Configuration should be carried out for the Orders and Invoice entity if required.
11. Next it is necessary to set up permission in the user security role to allow them access to the customisations. Go to settings and Administration.



12. Select Security Roles and modify your security role as required to match the setting below for the SPPDFSettings entity and then save and close. Repeat this for all users that will have access to the Sales PDF Productivity Pack.



Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
SPROFSettings	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Audit Line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Audit Setup	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Audit Configuration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Audit Header	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Key

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

13. Once this has been done configuration is complete.



Using CRM Sales PDF Productivity Pack

Once CRM Sales PDF Productivity Pack is configured that is very little user intervention required.

To use the Sales PDF Productivity Pack open one of the record types that has been configured Quote; Order or Invoice. In this example we will show the Sales PDF Productivity Pack working in a quote records.

Pre-requisites.

- Installation has been completed
- The workstation that the user is using has PDF reader software installed and configured.

Open the record.

Open the quote record.

The screenshot shows a web browser window displaying a Microsoft Dynamics CRM interface. The title bar reads 'Quote: Mountain 100 quote - Windows Internet Explorer'. The browser's address bar and menu bar are visible. The main content area is titled 'Quote: Mountain 100 quote' and has a sub-tab 'Information'. Below this, there are several tabs: 'General', 'Shipping', 'Addresses', 'Administration', 'Notes', and 'Sales PDF Productivity Pack'. The 'Sales PDF Productivity Pack' tab is currently selected. The form contains the following fields and values:

Quote ID *	290	Revision ID *	
Name *	Mountain 100 quote		
Potential Customer *	Fun Toys and Bikes	Currency *	Pound Sterling
Price List *	Wholesale		
Totals			
Detail Amount	£ 0.00		
Quote Discount (%)			
Quote Discount	£ 817.00		
Pre-Freight Amount	£ -817.00		
Freight Amount	£ 2,963.00		
Total Tax	£ 0.00		
Total Amount	£ 2,146.00		

On the right side of the form, there is a 'Form Assistant' panel with a 'Form Assistant Help' button and a 'Select a lookup field' dropdown menu. The status bar at the bottom left shows 'Status: Draft' and the bottom right shows 'Unknown Zone (Mixed)' and '100%' zoom level.

Navigate to the Sales PDF Productivity Pack Tab, as shown below.

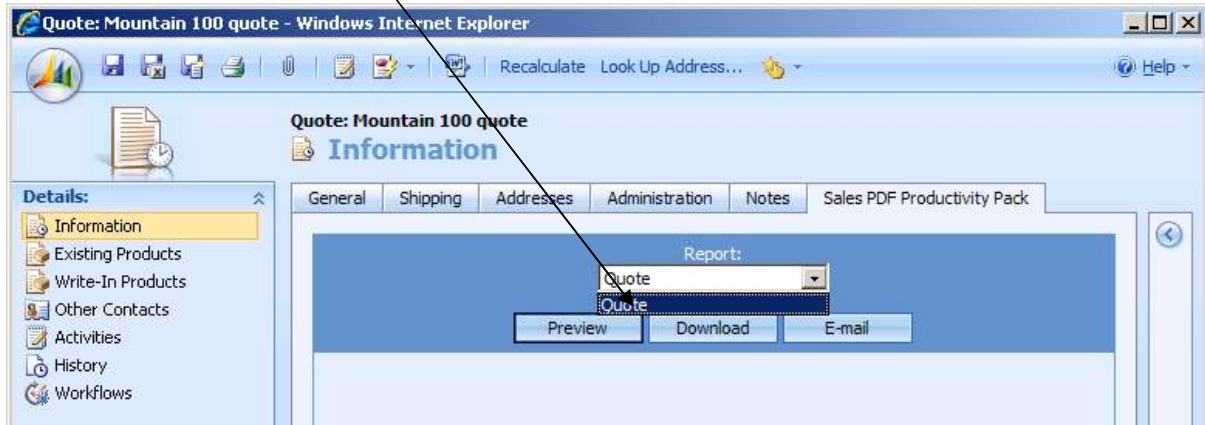


The screenshot shows a Windows Internet Explorer browser window with the title "Quote: Mountain 100 quote - Windows Internet Explorer". The address bar contains "Recalculate Look Up Address...". The main content area is titled "Quote: Mountain 100 quote" and "Information". Below this, there are tabs for "General", "Shipping", "Addresses", "Administration", "Notes", and "Sales PDF Productivity Pack". The "Information" tab is active, displaying a "Report:" section with a dropdown menu set to "Quote". Below the dropdown are three buttons: "Preview", "Download", and "E-mail". The left sidebar, titled "Details:", contains a list of options: "Information", "Existing Products", "Write-In Products", "Other Contacts", "Activities", "History", and "Workflows". At the bottom of the browser window, the status bar shows "Status: Draft", "Done", and "Unknown Zone (Mixed)" with a 100% zoom level.



Select the report format.

If you have more than one quote report available in your CRM system, select the report that you wish to use from the drop down list.



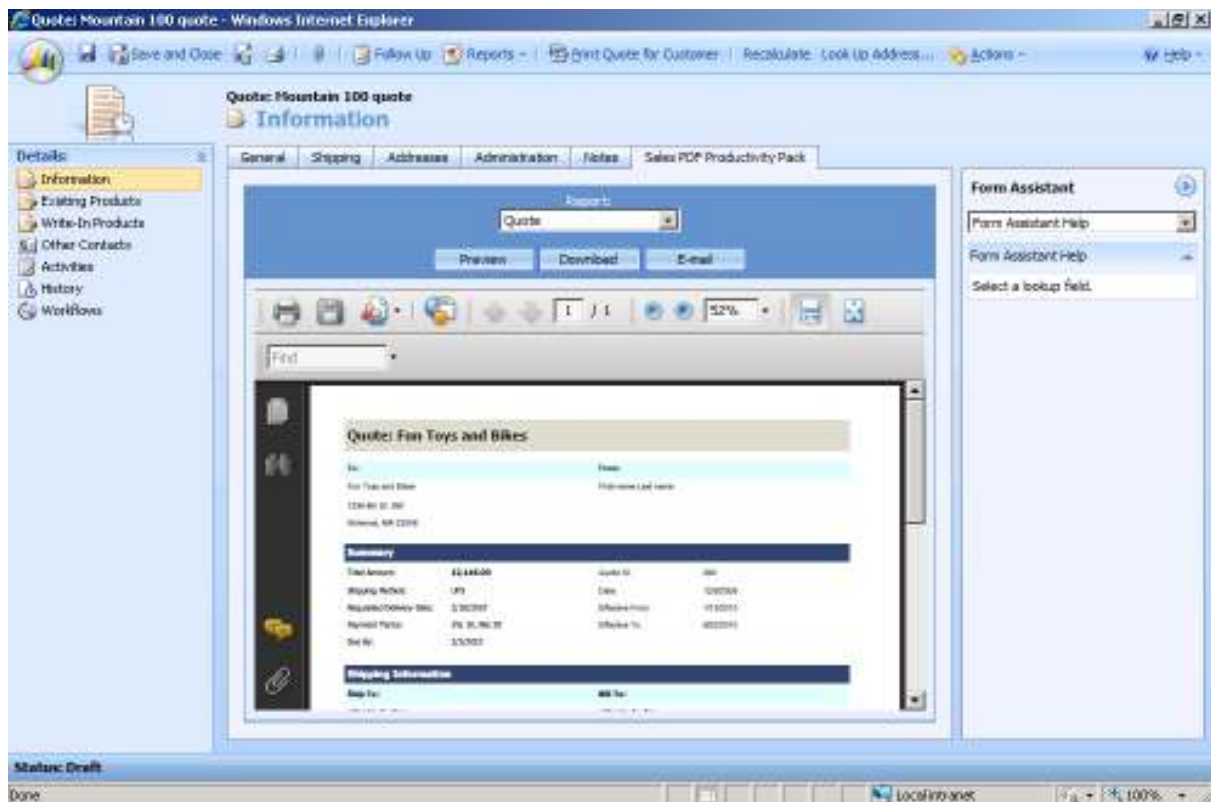


Select the action that you wish to perform:-

Review to review a quote on the screen
Save to save the quote
E-mail to attached the quote to a CRM email

Preview.

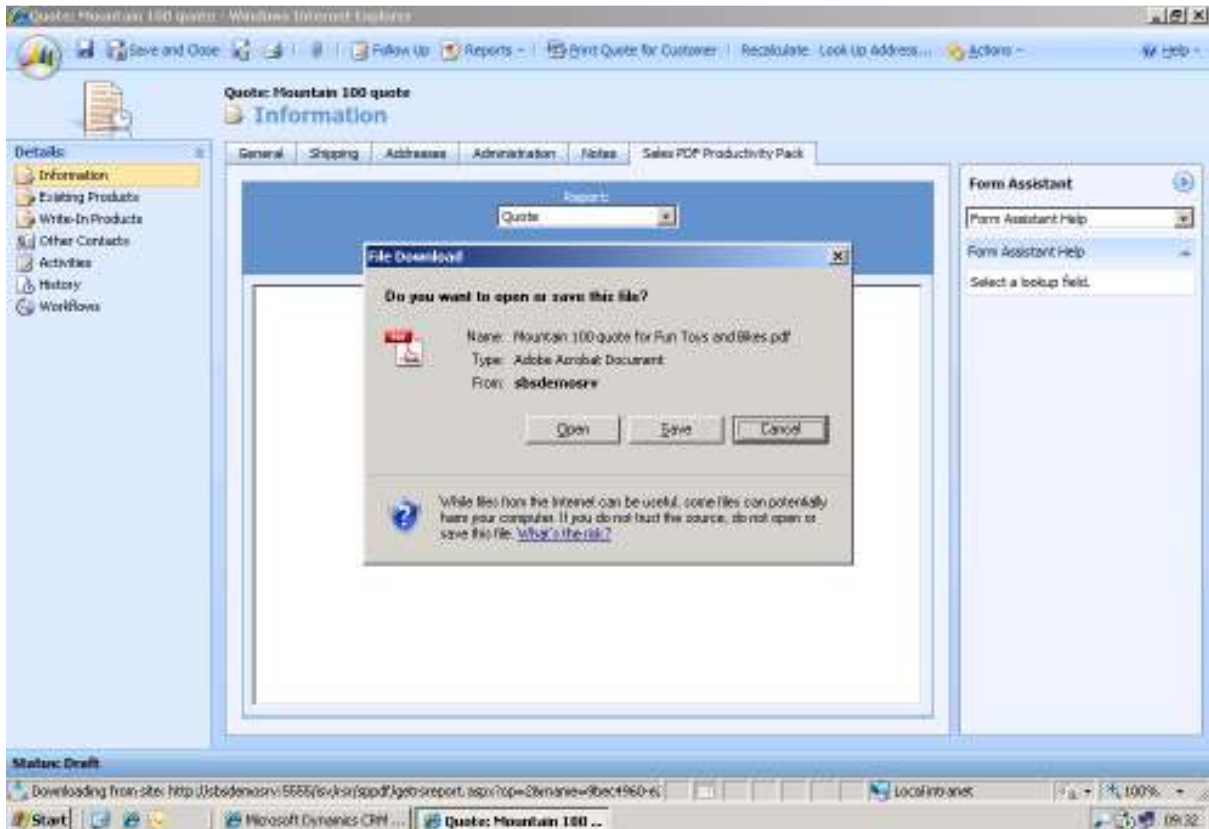
Selecting the Preview option will present a view of the report that has been selected.



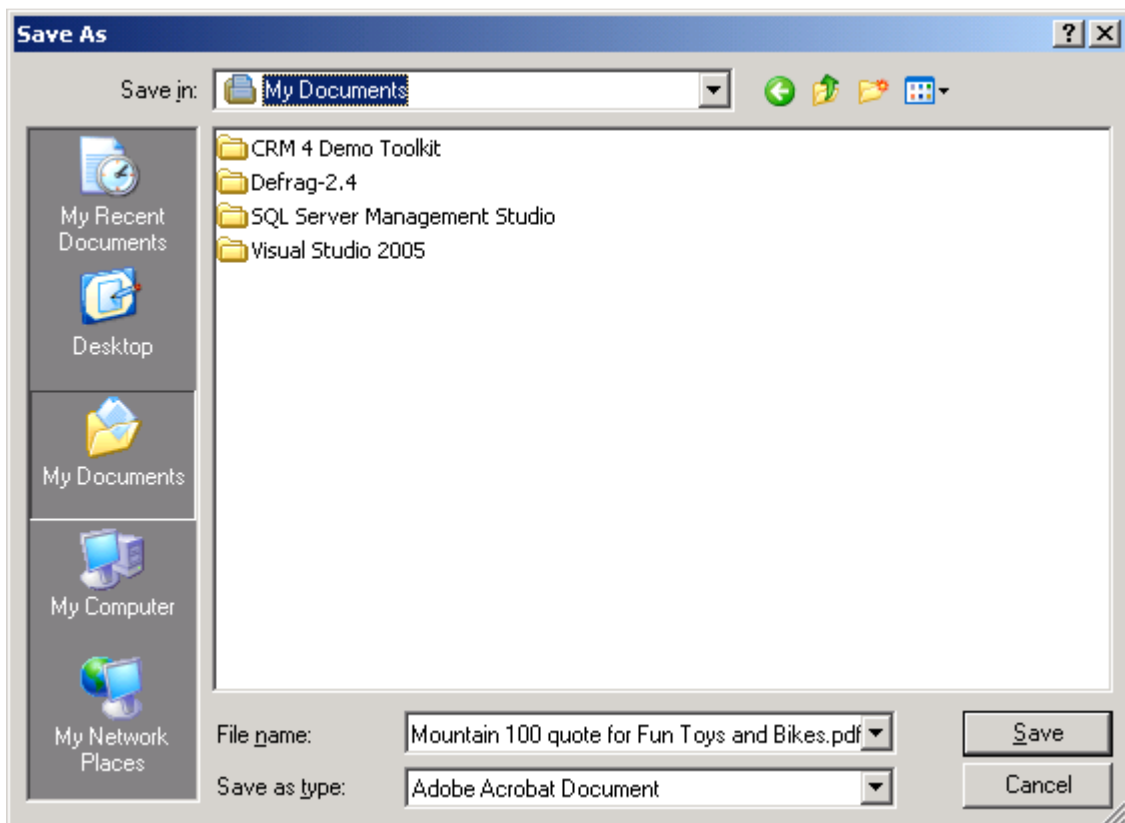
From here you can carry out a number of activities that would be allowed within a PDF preview, save, print and other actions as displayed in the menu bar and that would be available depending upon the PDF reader that you have installed.

Download.

Selecting the Save download will present the file download dialogue box, the name of the file will be taken from the naming convention that has been configured in the SPPDFSettings, an example is shown below.



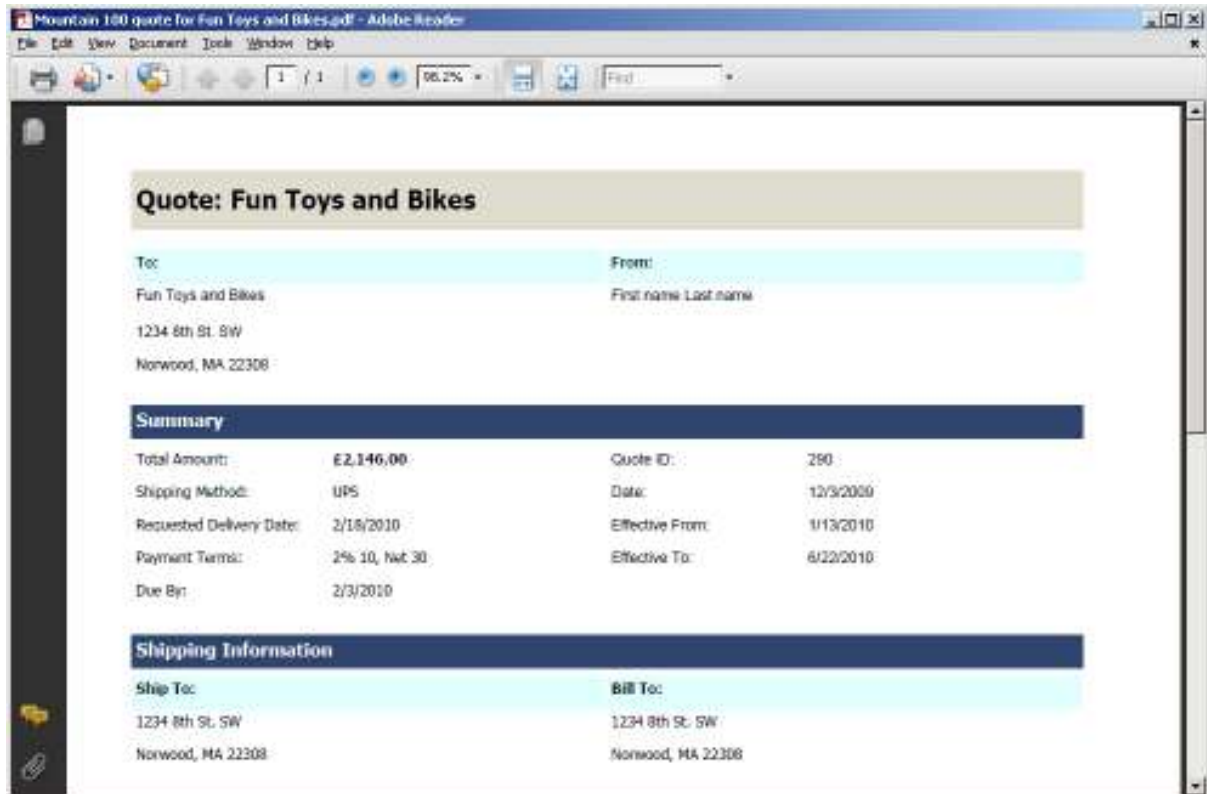
Selecting Save will then present the normal Windows save dialogue, shown below.





Selecting Save will save the file in the selected location. And close the dialogue widow.

Selecting Open will display the document in your installed PDF reader, an example is shown below.



E-mail.

Selecting the E-mail option will create an email activity, attach the file to the email, and complete the following fields:-

From

To

Subject, based upon the subject configuration in the SPPDFSettings

Owner



E-mail: Mountain 100 quote for Fun Toys and Bikes CRM:0001007 - Windows Internet Explorer

Save and Close | Forward | Reply | Reply All | Convert Activity | Actions | Help

E-mail
Mountain 100 quote for Fun Toys and Bikes CRM:0001007

This message has not yet been submitted for delivery. For more information, see help.

E-mail | Attachments

From: First name, Last name | Cc: |
To: Fun Toys and Bikes | Bcc: |
Subject: Mountain 100 quote for Fun Toys and Bikes CRM:0001007

Regarding: Mountain 100 quote |
Owner: First name, Last name |
Duration: | Priority: Normal |
Due: | Sub-Category: |
Category: |

Status: Pending Send

E-mail: Mountain-100 quote for Fun Toys and Bikes - Windows Internet Explorer

Save and Close | Follow Up | Send | Convert Activity | Actions | Help

E-mail
Mountain-100 quote for Fun Toys and Bikes

E-mail | Attachments

New E-Mail Attachment | X

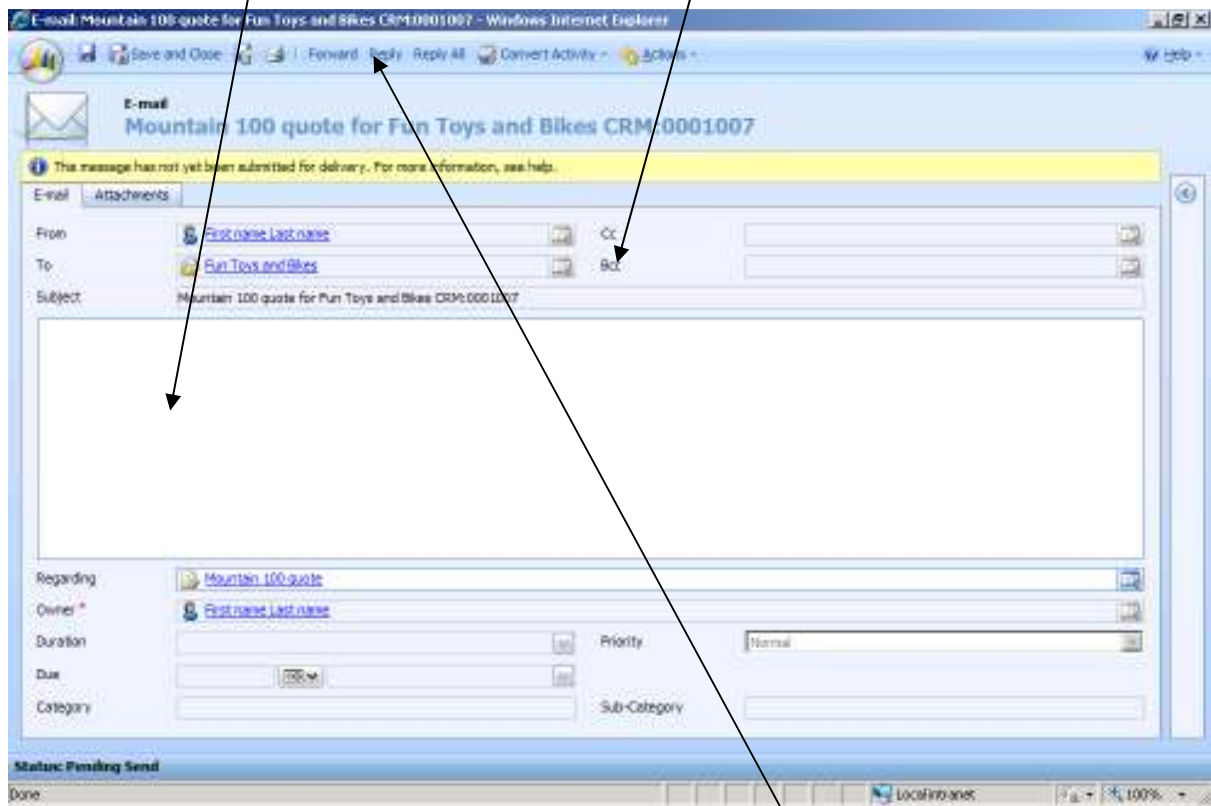
File Name	File Size (Bytes)
Fun_Toys_and_Bikes_quote_number_Mountain-100_quote...	5,883

1 of 1 selected. | Page 1 of 1

Status: Draft

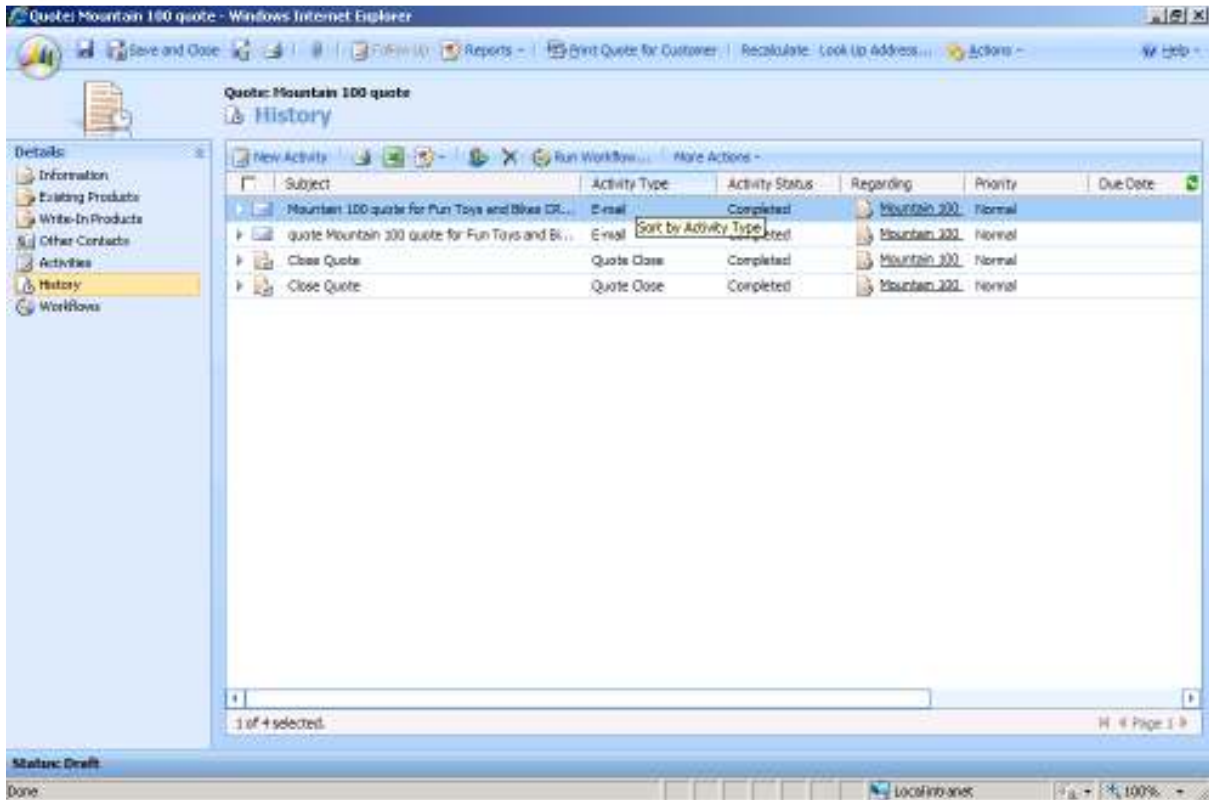


At this point free format text can be added or an email template can be selected.



Once complete the email can be sent by selecting the send option.

Once the email has been sent it can be seen in the record history



The Sales PDF Productivity Pack will then also display a message confirming to the user that the email has been sent.

