DocumentsCorePack TemplateDesigner User Guide for Dynamics 365

August 2023

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Preamble

This documentation is intended to guide you through the generation and design process of templates in DocumentsCorePack.

This guide applies to version 7.110 (8.110) or higher.

Please read this document carefully and follow the steps provided to achieve the best results.

Target Audience

This guide is intended for users designing templates for DocumentsCorePack who have the following minimum skills:

- Basic Knowledge of Microsoft Office Word
- Basic Microsoft Dynamics 365 Knowledge

Purpose of the DocumentsCorePack Template Designer?

The DocumentsCorePack Template Designer facilitates, among other things, the creation and modification of DocumentsCorePack Templates in Microsoft Dynamics 365. It has predefined fields called Mail Merge Fields. These are references to attributes in the Microsoft Dynamics 365 system (For example Company, Address, Contact, etc.).

Templates can be created for each Microsoft Dynamics 365 entity (For example Contact, Opportunities, etc.). They facilitate the generation of documents, such as Account templates, Quote & Invoice templates, Marketing List templates for multi-mails, and more.

There are essentially two different types of templates: deprecated Word Standard and Office Open XML.

We recommend you use the DocumentsCorePack templates because they are not limited to a single data source. As a result, our DocumentsCorePack templates can resolve any relationships between the entities. In the following chapters, you will learn more about the basics of the DocumentsCorePack Template Designer, how to create a completely new template, and how to handle already-created templates.

1 DocumentsCorePack Template Designer Basics

The DocumentsCorePack Template Designer is a locally installed add-in for Microsoft Office Word, which enables you to:

- Insert placeholders for Dynamics 365 Data (called **Merge Fields**) within templates.
- Resolve relationships to gather data from related data in Dynamics 365 records.
- Insert advanced objects like QR-Codes or calculations based on Dynamics 365 data.
- Pull fields from standard and custom entities into templates.
- Filter and sort retrieved records in the templates in any way.

- Handle one-to-many and many-to-many relationships with ease.
- Place if-and-else conditions to define conditional content inside templates.
- Set the culture and format of money, integer, and decimal fields inside templates.
- Generate dynamic document names and dynamic save locations for templates.
- Insert dynamic pictures into templates.
- Insert hyperlinks into templates.
- Define arithmetic operations and set the corresponding variables as Dynamics 365 fields.
- Insert sub-templates or other documents into the main document or template.
- Configure various settings in the templates.

The DocumentsCorePack Template Designer can be easily accessed via the www.mscrm-addons.com tab in the MS Word command bar.

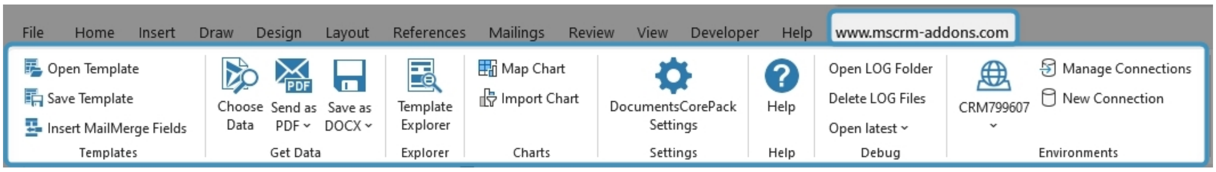


Figure 1: Microsoft Office Word with mscrm-addons.com Ribbon

1.1. The www.mscrm-addons.com tab

There are two main menu items in the www.mscrm-addons.com tab that facilitate the creation of templates:

The orange box marks the DocumentsCorePack TemplateDesigner functionality that does not belong to the Template Designer guide.

The box on the left side contains options to save and open templates.

The box on the right side does not belong to the default items of the command bar. It only appears after inserting a field from the DCP Template Designer to manage the field properties.

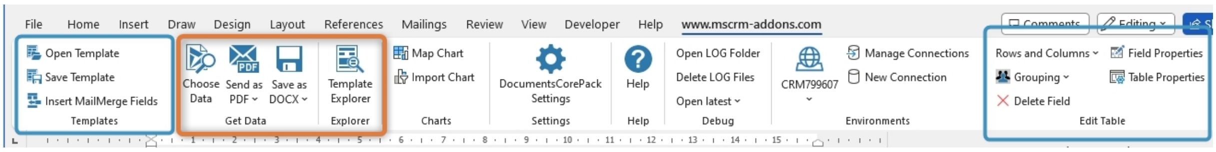


Figure 2: www.mscrm-addons.com tab details

1.2. How to open DocumentsCorePack Template Designer

Open a Microsoft Word document, navigate to the 1 **www.mscrm-addons.com** tab, and click on the 2 **Insert MailMerge Fields**.

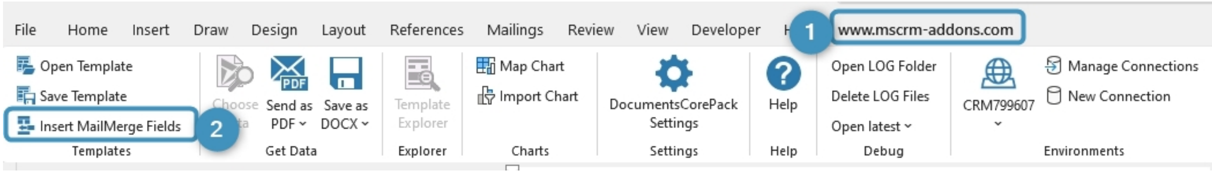


Figure 3: Open DocumentsCorePack TemplateDesinger

The Template Designer opens on the right-hand side of the Word window.

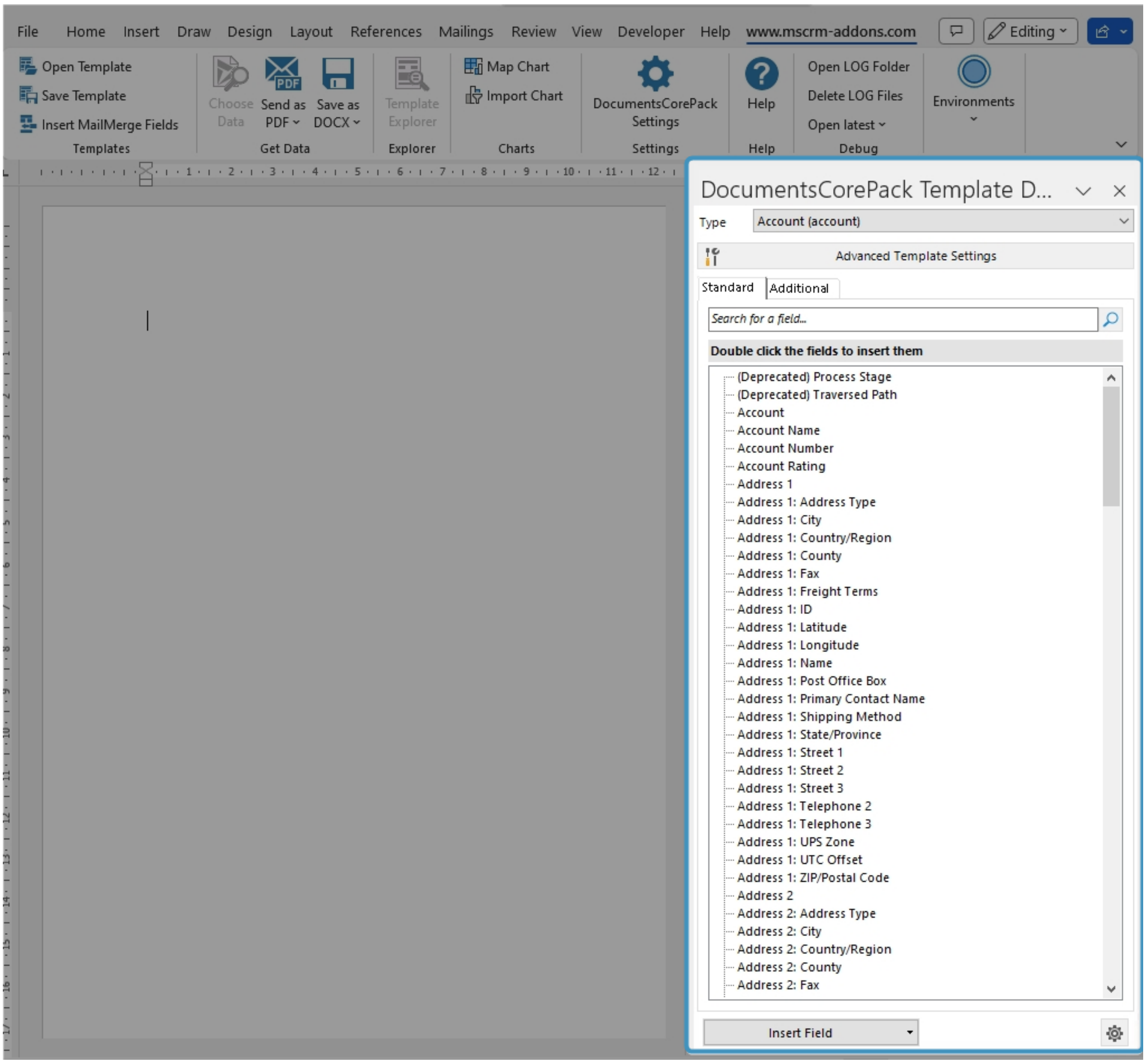


Figure 4: DocumentsCorePack TemplateDesigner task pane in Word

1.3. The DocumentsCorePack Template Designer User Interface (Standard)

The DocumentsCorePack Template Designer is a task pane in Word which extends your local Word installation with the required tools to insert fields.

1.4. Standard

1. Type Selector
2. Advanced Template Settings
3. Standard Fields
4. Additional Relationships
5. Search
6. Tree View
7. Insert Fields
8. Task pane Settings

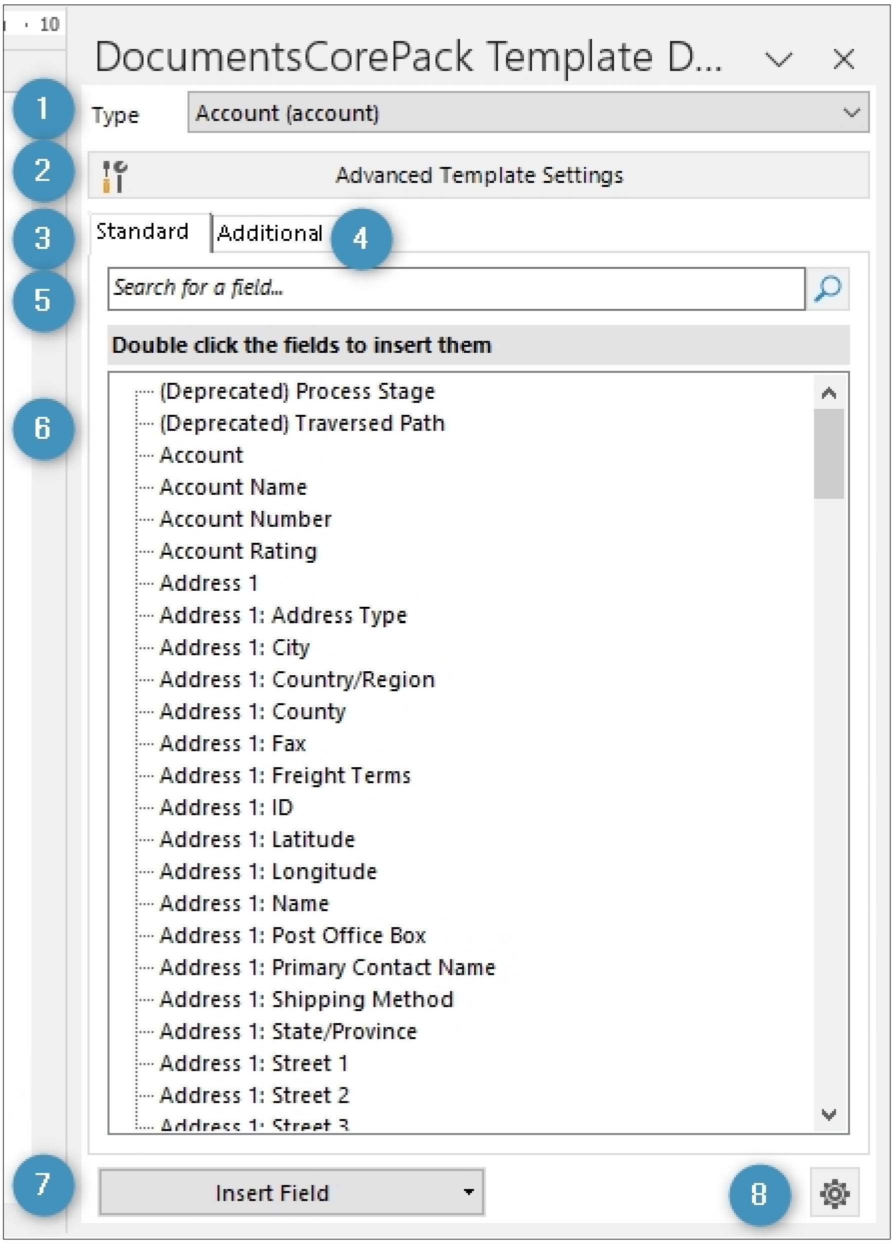


Figure 5: DocumentsCorePack Template Designer UI - Standard tab

1.5. Type Selector

The first step in creating a new template is always to select the entity that the template should be based on. In the Type Selector drop-down menu, every standard and custom entity is available. This selection is locked as soon as a field is inserted, or a property is set.

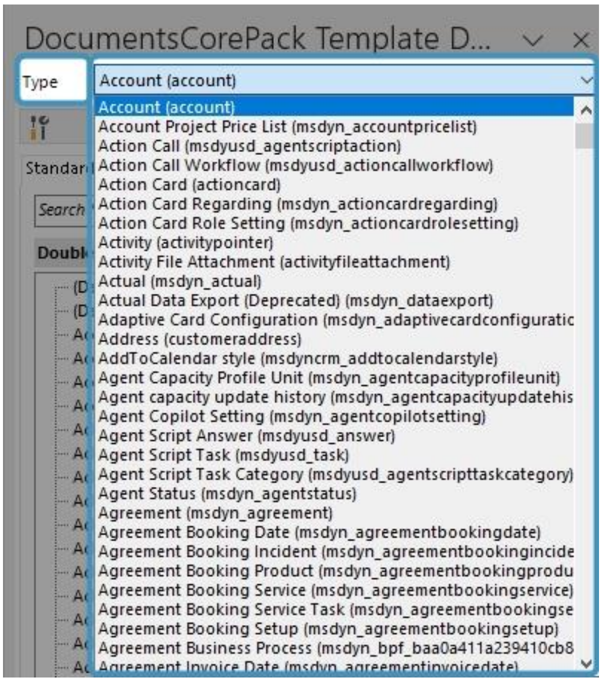


Figure 6: Type Selector

1.6. Advanced Template Settings

Clicking the **Advanced Template Settings** button will open a new window.

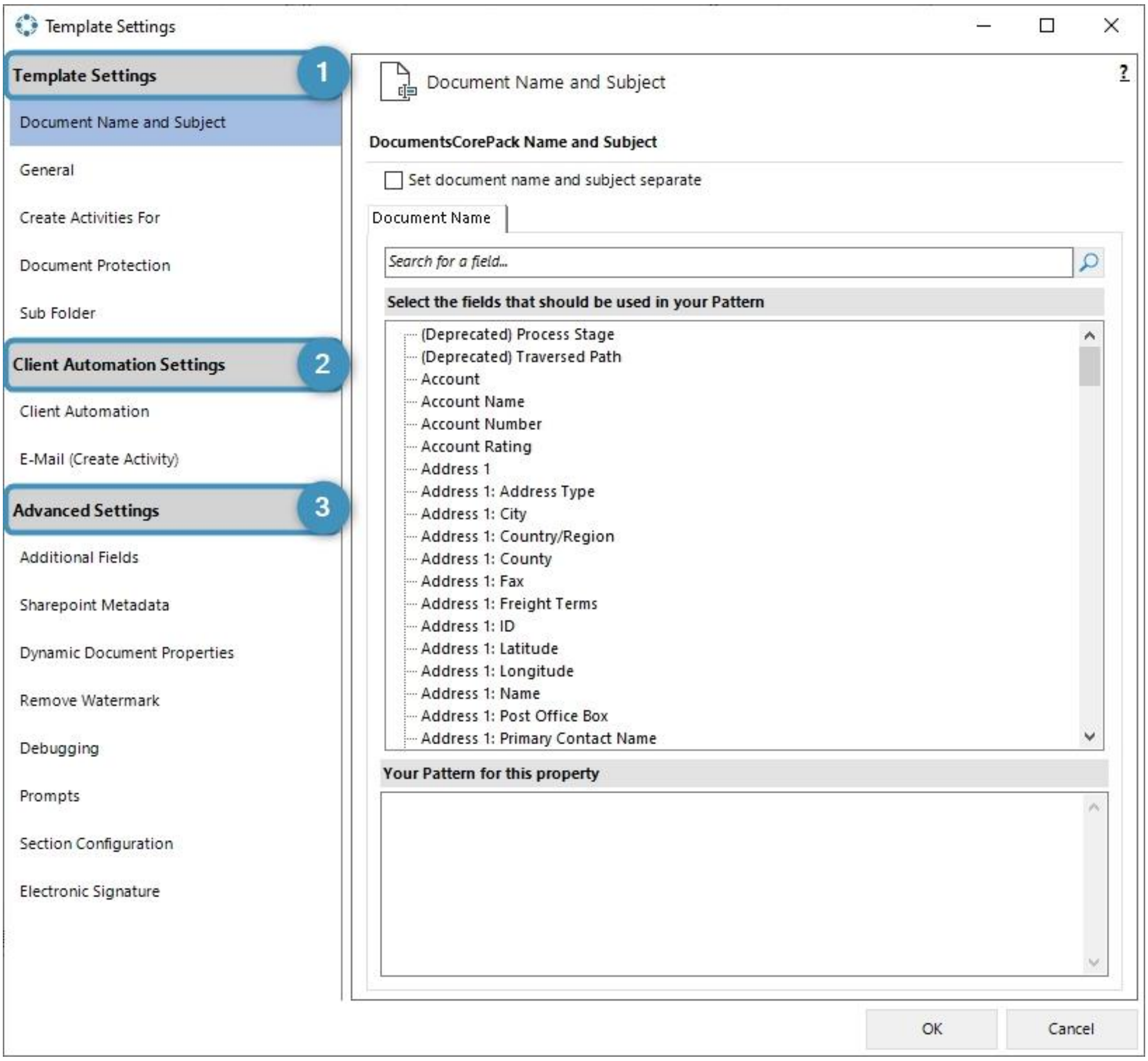


Figure 7: Template Settings category

The Advanced Template Settings are divided into 3 main categories:

➊ **Template Settings:** These settings describe the document behavior during document generation. This section contains the possibility to define:
➋ **Client Automation Settings**: These settings are only for the DocumentsCorePack Template Designer.
➌ **Advanced Settings**: These settings include several additional features for specialized template behavior.

1.6.1 Document Name and Subject

The Document Name property allows you to define a name, or a name pattern for your template. This ensures that the future document has a specific and neat name the moment it is generated.

The allowed syntax for this property and the available options for this field are described in this chapter.

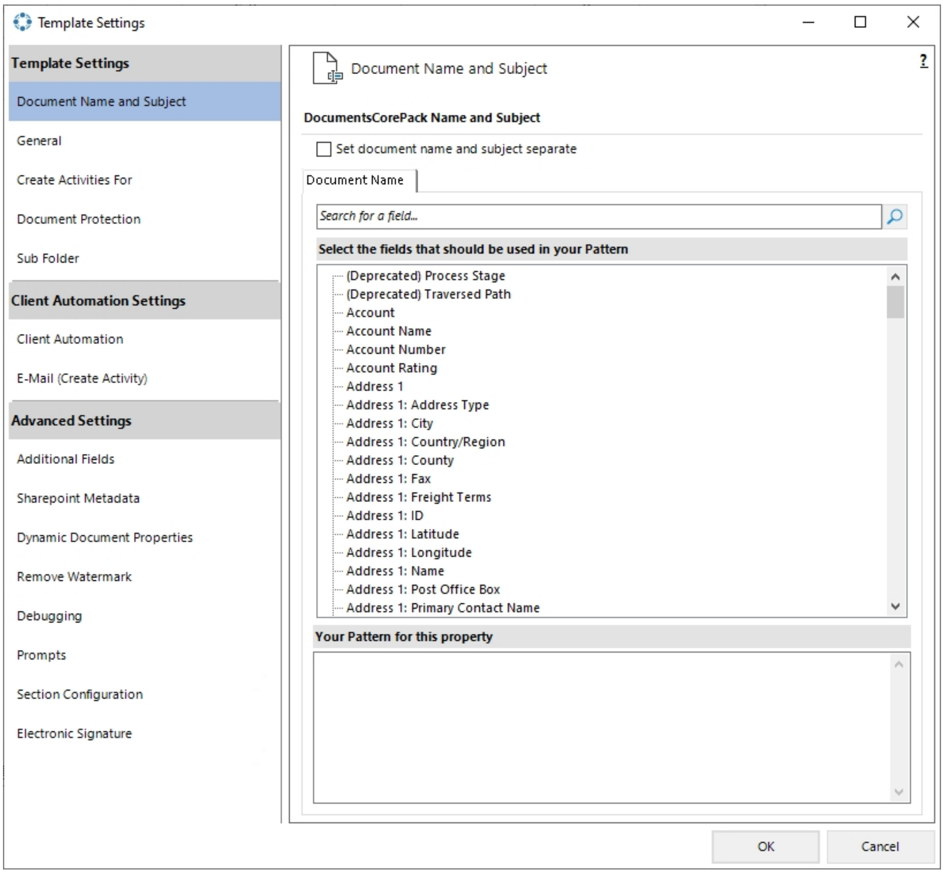


Figure 8: Document Name and Subject

1.6.2 General

The General property provides you with some general settings options for your future template.

1 General Settings

a. **Mark as Label Template**: Mark your future template as **Label Template** (which has a special behavior). Furthermore, you have the possibility to sort the label templates in the grey highlighted section on the right side. Simply activate the sort function by clicking in the field.

b. **Do not compress inserted images**: Change your image settings, for example: do not compress inserted images.
c. **Template Specific Language**: Select here the language of your choice. Learn more in this article.

② Images

a. **Target Output (DPI)**: Select the resolution of a print or scan.
b. **Enable fast Image Conversion**: Generation speed could be improved, but quality could decrease when processing images with this setting enabled.

③ Compression

a. **Do not remove base64 strings from data source**: In the document a copy of the inserted image is left as a base64 string. To save space, it is removed by default.

④ Server Side Properties

a. **Workflow**: Define in the template which workflow should be executed.
b. **Preserve Form fields for PDFs**: Fillable PDF forms are PDF documents that include certain fields that can be edited without a PDF editor software. Learn more.
c. **Do not export Picture-Link Images as Base64**: With this option you can send E-mails with dynamic images. Learn more.
d. **Embed full Fonts in the PDF Files:** Non-standard fonts need to be embedded in the PDF to ensure they can be viewed and printed properly. Font embedding is the inclusion of the actual font files inside a pdf file. This can result in larger files.
e. **Enable Open Path Font support for PDFs:** To ensure that Open Path Fonts (.opf) are correctly displayed in PDF documents, it is important to activate this option.
f. **PDF Compliance**: It is a globally accepted standard, that ensures that PDF documents can still be read without problems even decades later.
    - **PDF Compliance 1.4**: Is independent of the original application software, hardware, and operating system used to create them.
    - **PDF Compliance 1.5**: This version was only used for a short time period.
    - **PDF Compliance 1.7 (ISO 32000-1)**: Is the most recent and widely used version DCP supports at the moment.
    - **PDF/A-1a – Level A conformance (PDF/A-1a)**: PDF documents can be made accessible to people with disabilities through the use of various accessibility features.
    - **PDF/A-1b – Referred to as Level B Conformance**: This has a lower level of accessibility than PDF/A-1a.
g. **Do not add CRM Signature to generated HTML (deprecated)**: A marker was set in the HTML to prevent the signature from being inserted in the CRM.

5 Query (FetxhXML) Generation

a. **Use Deep Fetch Analyzer**: The Deep Fetch Analyzer is a feature required for templates with many relationships and executes the fetch in an alternative way. Learn more.

b. **Use Query Expression**: FetchXML will be converted to Query Expression. It represents the basic support for **Virtual Tables/Entities**.

6 Note Creation Settings

a. **Note Title**: Give a title to the note that is created. Here is the Syntax.

b. **Note Description**: Enter a description for the note that is created. Here is the Syntax.

7 Master Template

a. **Header/Footer (static)**: Manage the design of the header and footer of the document in a separate template. Learn how to do this here.

b. **Separate Footer (static)**: This is an optional setting for a Master Template for the footer.

8 Miscellaneous

a. **Disable Relative UTC Time Option**: With this option, the time will be displayed based on the local time zone defined on the device or server where the document is created.

b. **Enable HTML Formatting for Fields:** Maximize your user experience when working with HTML. This guide will help you.

c. **Convert field codes to text after merge (Field codes are not editable in Word for Web):** Field codes like what-if statements or page numbering are converted to text in the merge process.

d. **Convert all tables to text:** All tables within your document are converted to text in the merge process.

e. **Enable whitespace preservation for text fields**: Leading whitespaces from text fields are considered and printed if this is active. Without this setting, the leading whitespaces are removed when merging the document.

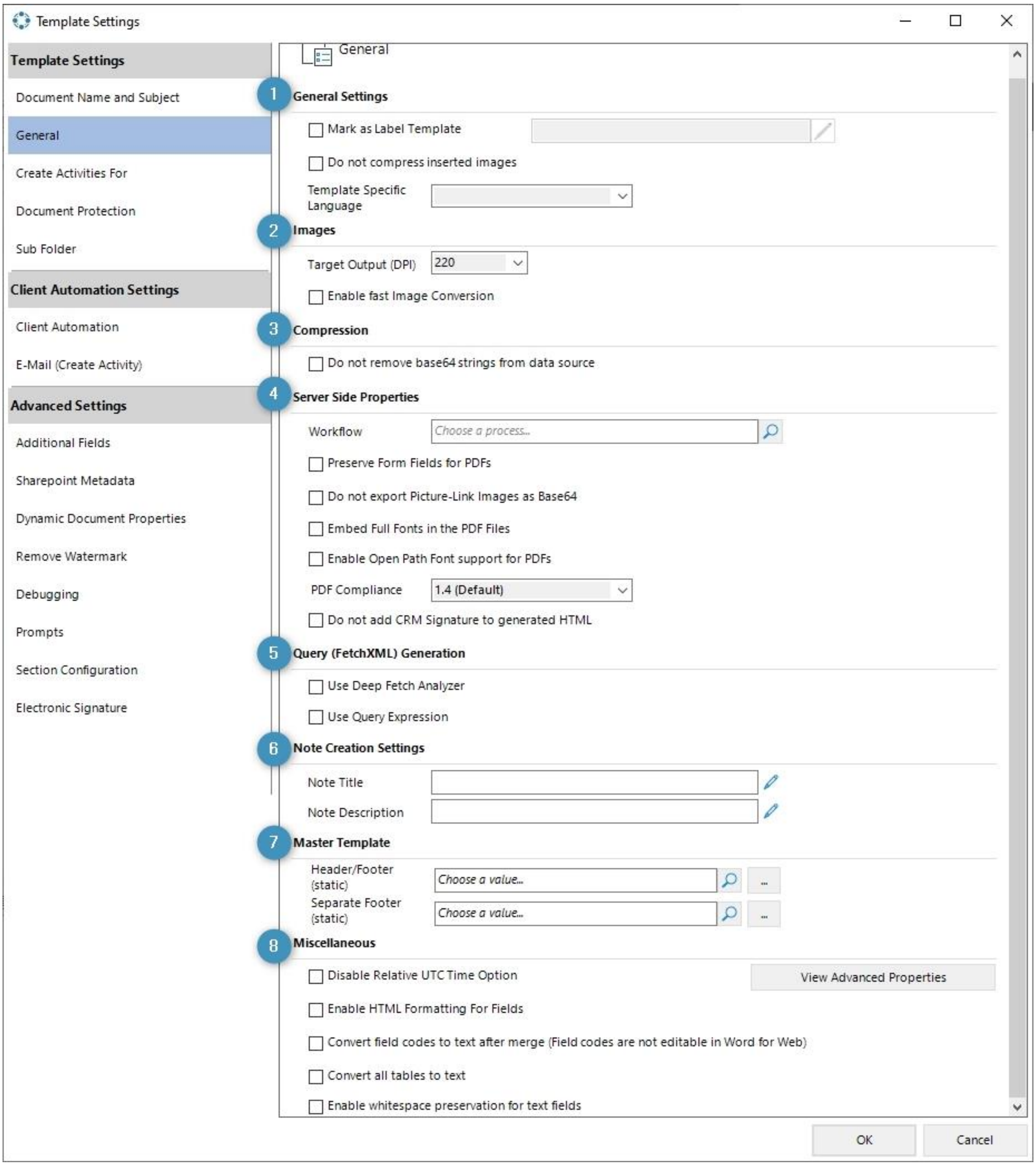


Figure 9: General Settings

1.6.3 Create Activities For

This section is used to predefine settings for DocumentsCorePack TemplateDesigner based operations. It affects the Regarding and Recipient fields for Dynamics 365 activities created with the DocumentsCorePack TemplateDesigner.

1.6.4 Document Protection

You can provide a password to your generated Word document. Also, for the DocumentsCorePack document generation, you can set a password for your PDF and enhance the security of your PDF. Learn how to it in this article.

1.6.5 Sub Folder

Specifies the subfolder in which the generated document should be stored or created. Note: Our solution will create the folder if required.

1.6.6 Client Automation

Set certain options to improve the speed of work by setting default options for certain DocumentsCorePack TemplateDesigner based operations.

1.6.7 Email (Create Activity)

These settings are only intended for the DocumentsCorePack TemplateDesigner based operations. It only takes affect when the **Create Activity** button of the Template Designer is used and does not work with the Send as ...-option.

1.6.8 Additional Fields

This area contains fields that are not directly inserted into the template but are required in the merge process (hidden fields). You do not have to worry about the settings because all out of the box functionalities populate the necessary fields automatically.

1.6.9 SharePoint Metadata

If you are using the standard Dynamics 365 SharePoint integration you can define metadata fields and values in your template. As soon as the generated document is saved, also the metadata is populated to Dynamics 365. Learn more in this article.

1.6.10 Dynamics Document Properties

Document properties, also known as metadata, are details about a file that describe or identify it. They include details such as title, author name, subject, and keywords that identify the document's topic or contents. Learn more in this article.

1.6.11 Remove Watermark

This section is used to define a condition that will remove the watermark if met. Learn more about the Syntax in this chapter.

1.6.12 Debugging

The Debugging tab can be helpful for troubleshooting because it shows all the fetches that are in the template.

1.6.13 Prompts

Configure user-prompts for this template, to allow the user to change the result during generation. Prompts enable the user to add or modify document elements without opening the document. The additional options for prompts are displayed in an additional window of the DocumentsCorePack dialog. Learn in this article how to set up User-Prompts.

1.6.14 Section Configuration

Learn how setup editable sections in your template (Dynamics 365).

1.7. Additional tab

This window has been designed to manage and insert additional fields.

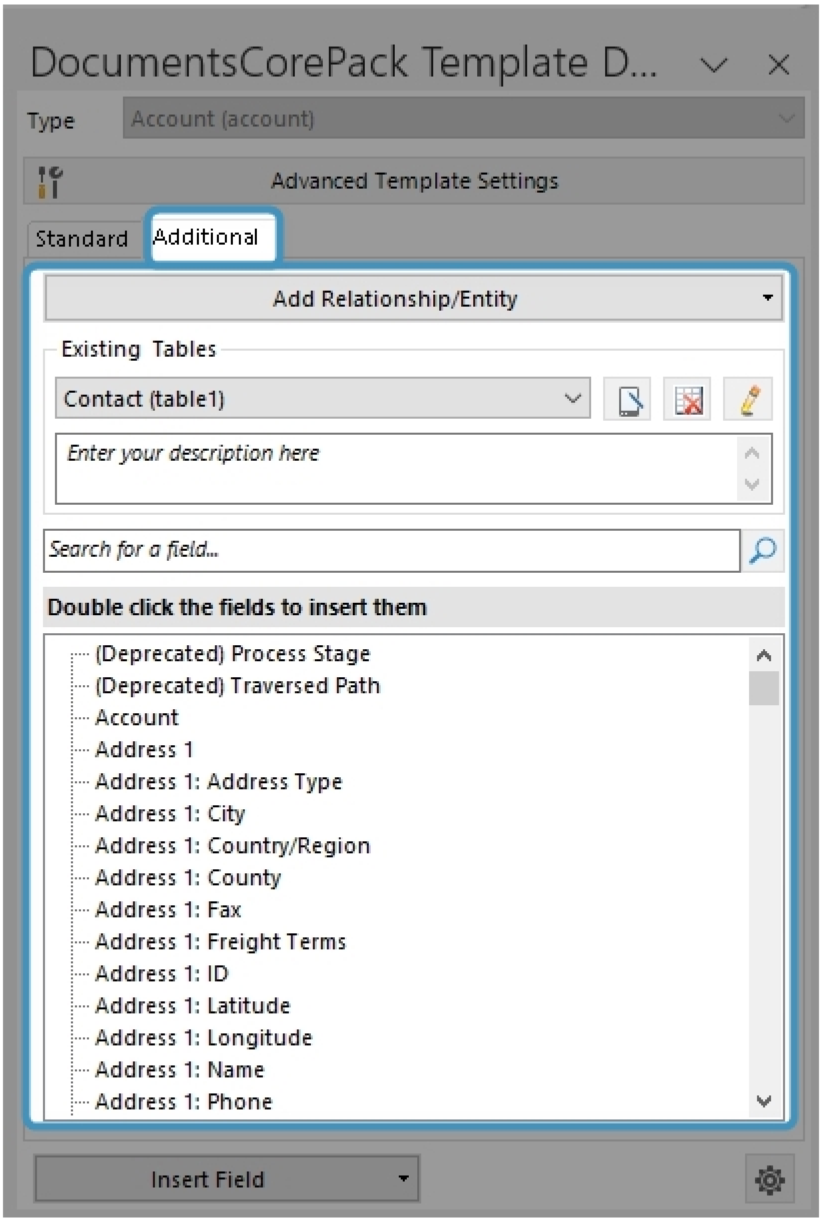


Figure 10: DocumentsCorePack Template Designer UI - Additional tab

1.7.1 Add Relationship/Entity

A click on the button 1 **Add Relationship/Entity** will open the relationship designer to create a new relationship from scratch. A click on the 2 **drop-down arrow** expands an extended menu with predefined relationships.

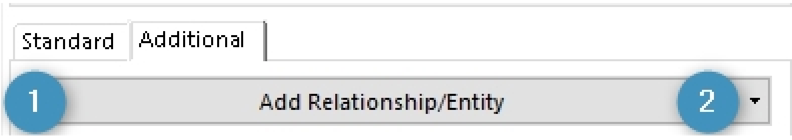


Figure 11: Add Relationship/Entity button

Clicking on the drop-down menu of the **Add Relationship/Entity** tab opens this dialog:

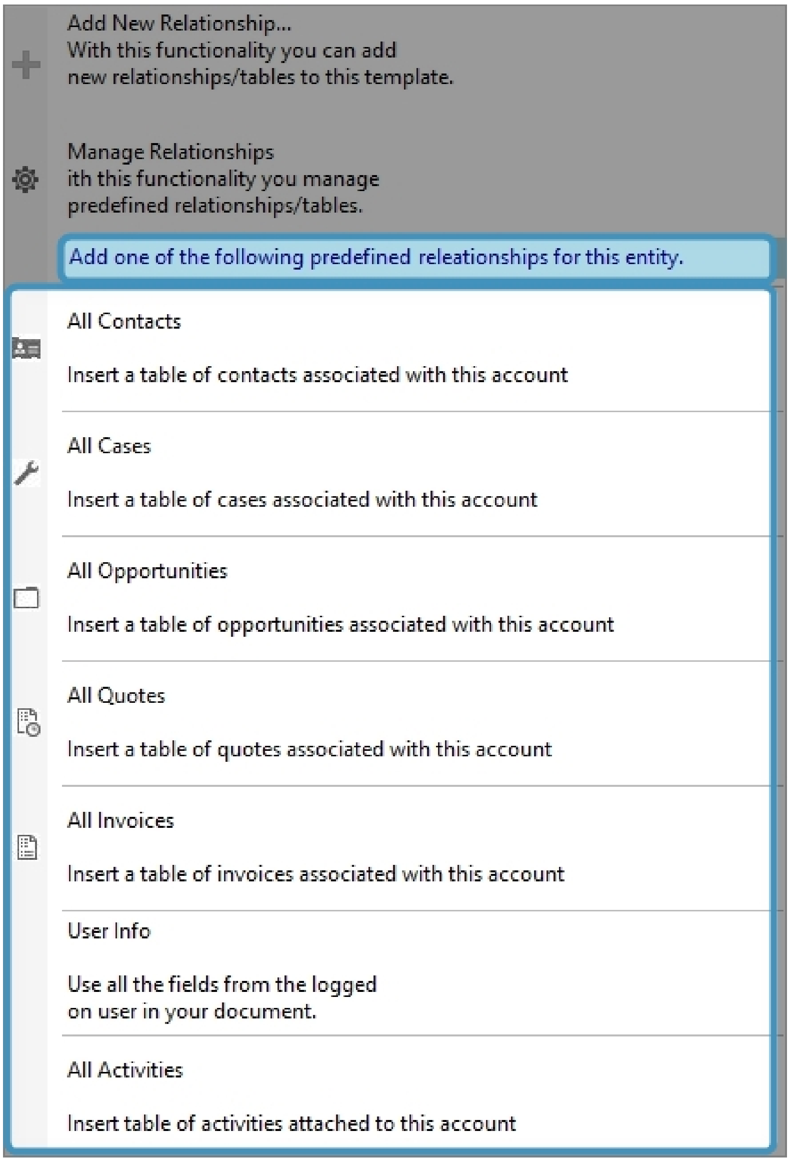


Figure 12: Predefined relationships

The marked area includes all predefined relationships. DocumentsCorePack already has a variety of different predefined relationships for standard Dynamics 365 entities (e.g., All Contacts of an Account, Quote Products of a Quote, etc.)

In our example, we selected **All contacts** to get access to the fields from the entity **Contact** by clicking on it.

Now the Additional tab TreeView is filled with the predefined relationship **All Contact** and you can easily insert them into your template.

1.7.2 Table Selector

The table selector is a drop-down menu that contains all added relationships for the current template. By switching the selection, the corresponding fields in the below TreeView change.

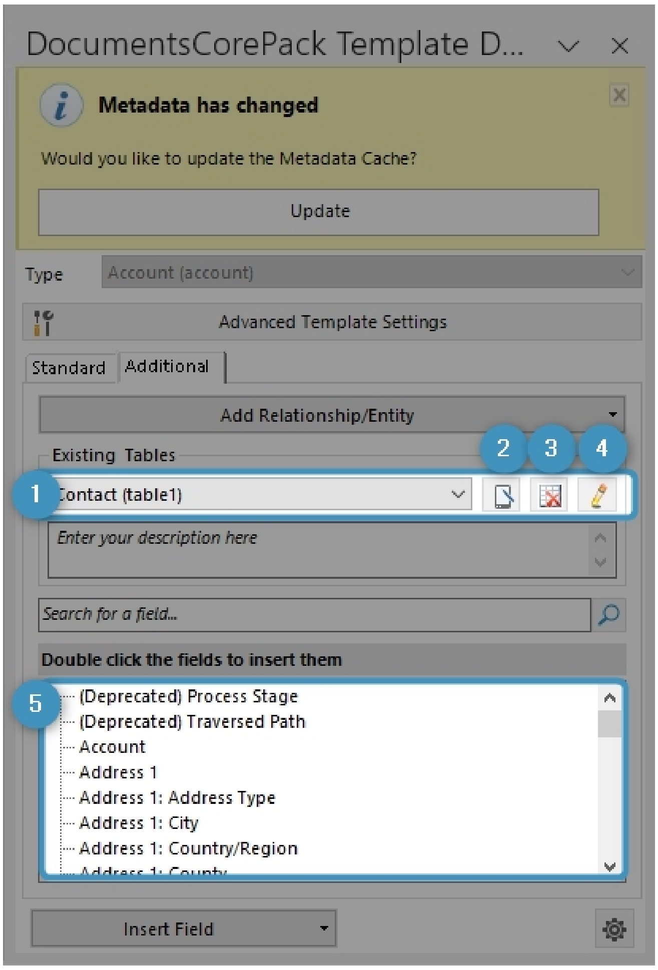


Figure 13: Table Selector

1 **Existing Tables**: In this drop-down menu, every resolved entity is listed as a table. This enables you to switch between all lists of fields.
2 **Rename**: You have the option to rename the table.
3 **Delete**: With this button you can delete the table.
4 **Edit**: Edit your table.
5 **TreeView**: Provides with full access to every field.

1.7.3 Additional Relationships

The **Add Relationship/Entity** button also includes options that allow users to add a new relationship or to manage existing relationships and tables.

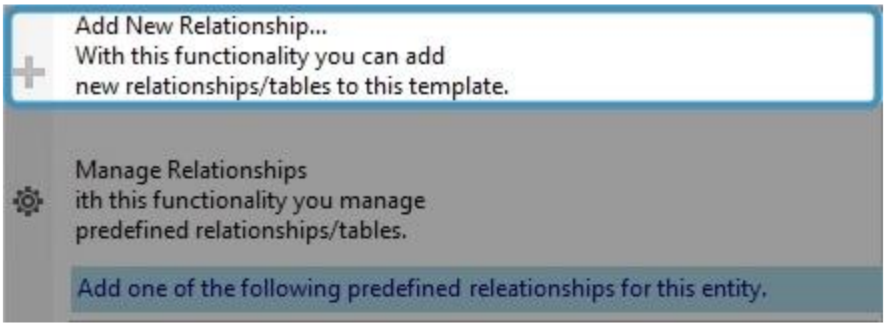


Figure 14: Add New Relationship option

Clicking the **Add New Relationship** button opens the dialog shown below. Here you can configure fields, tables and relationships that are important for your document.

1 Select existing Relation
2 Attributes
3 Advanced Settings
4 Filter
5 Sorting
6 Records to show

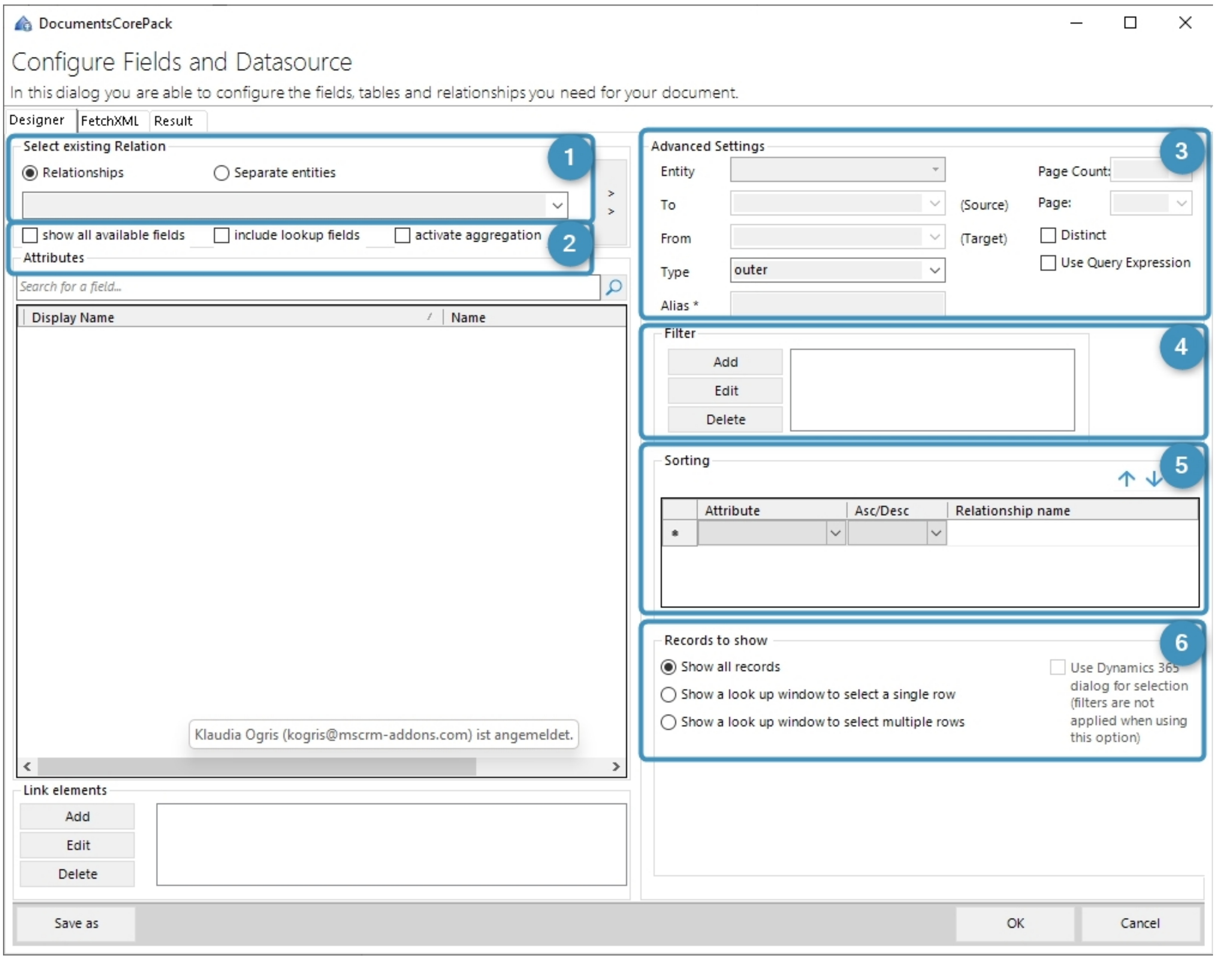


Figure 15: Configure fields and data source dialog of new relationship

1.7.4 Aggregation

Checking the activate aggregation checkbox allows its users to group relationships in certain ways.

The aggregation function allows you to aggregate attributes via the least/most important and to group attributes within specified limits. The functionality is very useful when you want to create an overview of certain data and sum or calculate the average of revenues or sales.

It can also be used to create quarterly, yearly, monthly, or daily reports. Aggregation fetches enable you to calculate sum(s), average minimum & maximum and count items. All aggregation methods supported by Microsoft Dynamics 365 can be easily applied to any template, although the selection depends on the fields to be inserted.

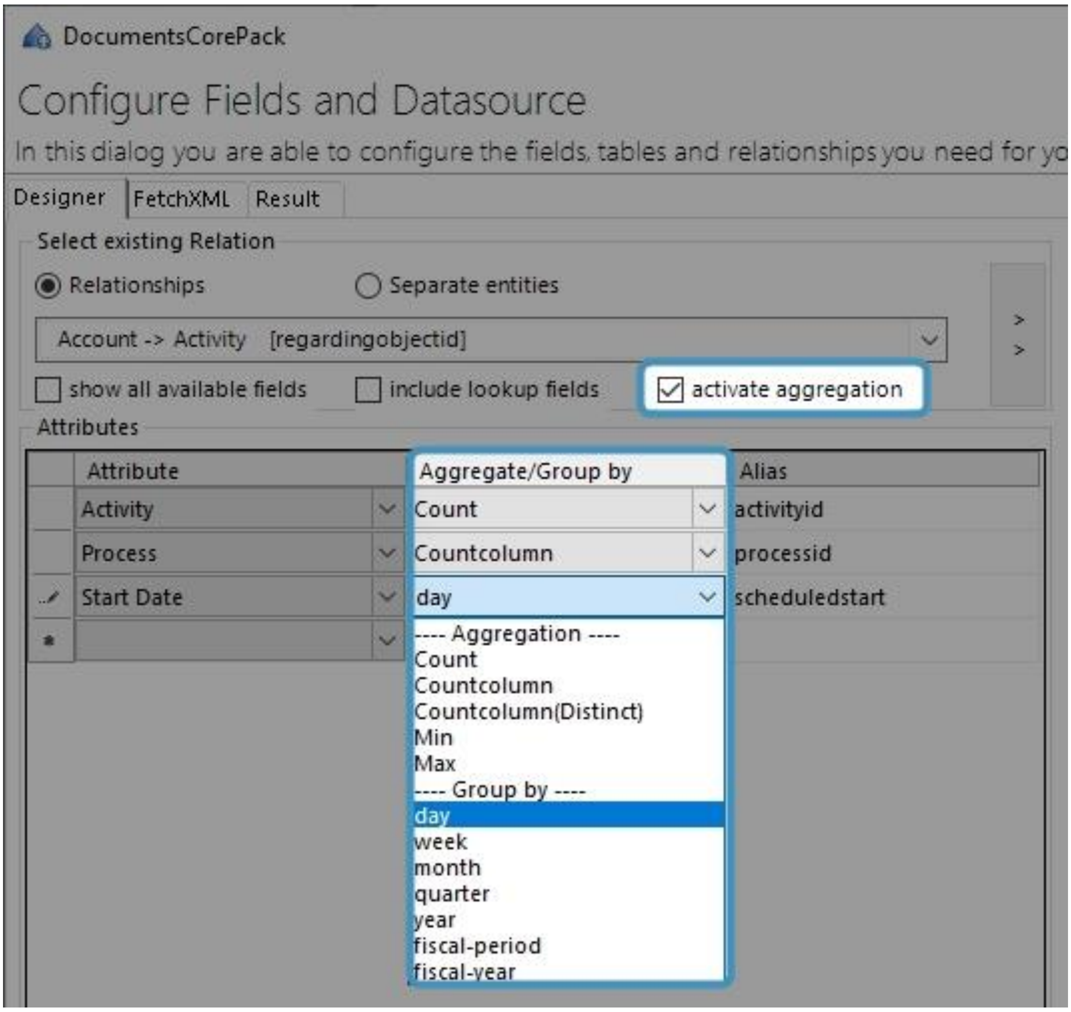


Figure 16: Aggregation checkbox activated including examples

The following aggregate functions are supported by Microsoft Dynamics 365:

- **AVG:** Average functionality is used for aggregating numerical values. It calculates the average (mean) of a specific field or attribute across multiple records or entities. With this functionality you can gain insights into your data's average performance, behavior, or results, allowing you to make data-driven decisions and track essential metrics for your business.

Please note: 0 is not considered when the average is calculated. However, the result of a calculation including 0 is replaced by zero (0).

- **COUNT (Sub-functionalities: COUNTCOLUMN, COUNT DISTINCT COLUMNS)**: The function allows you to calculate the total number of records or entities that meet specific criteria. The Count functionality is used to perform counting operations within CRM data.

- **MAX**: Is used to find the maximum (largest) value of a specific field or attribute within a set of records. For example, you can use MAX to identify the highest sales amount, the latest date, or the maximum quantity in each dataset.

Please note: 0 is not considered when the maximum value is calculated. However, the result of a calculation including 0 is replaced by zero (0).

- **MIN**: It is a function that helps you find the minimum (smallest) value of a field or attribute within a set of records. You can use MIN to determine the lowest sales amount, the earliest date, or the minimum quantity in a dataset.
- **SUM**: This is a function used to calculate the total sum of a numerical field or attribute across a set of records. It adds up the values within the specified field to provide a cumulative total. For instance, you can use SUM to calculate the total revenue, the total quantity sold, or the sum of expenses.
- **MULTIPLE AGGREGATES**: Multiple Aggregates refer to performing multiple aggregations on a dataset simultaneously. It involves calculating multiple summary statistics, such as sum, count, average, min, or max, across different fields or attributes simultaneously. This allows you to obtain various insights and analyze different aspects of your data in a single operation.
- **GROUP BY**: This is a clause used to group records based on one or more specific fields or attributes. It divides the data into subsets or categories based on the specified criteria. When combined with aggregate functions like SUM or COUNT, it allows you to calculate summary statistics within each group separately. For example, you can group sales data by region to determine the total sales amount per region.

    - **GROUP BY WITH LINKED ENTITY**: This sub-functionality enables you to use the sum aggregate attribute to sum linked entity values.
    - **GROUP BY YEAR, QUARTER, MONTH, WEEK, or DAY**: These sub-functionalities enable you to group results by year, quarter, month, week, or day.
    - **MULTIPLE GROUP BY**: This functionality enables you to use multiple groups by clauses.

- **ORDER BY**: This is a clause used to sort the records in a specific order based on one or more fields or attributes. It arranges the data in ascending or descending order. ORDER BY is often used in conjunction with aggregate functions to sort the aggregated results based on a specific criterion. For instance, you can order a list of customers by their total purchase amount in descending order.

1.8. Search Field

The search capability allows you to search the TreeView for a specific field name. The search includes the display name, the schema name and the description depending on the configuration.

The ***** is a supported wildcard character. As a default, the search supports left truncation. Enter your search term in the textbox and hit the magnifier.

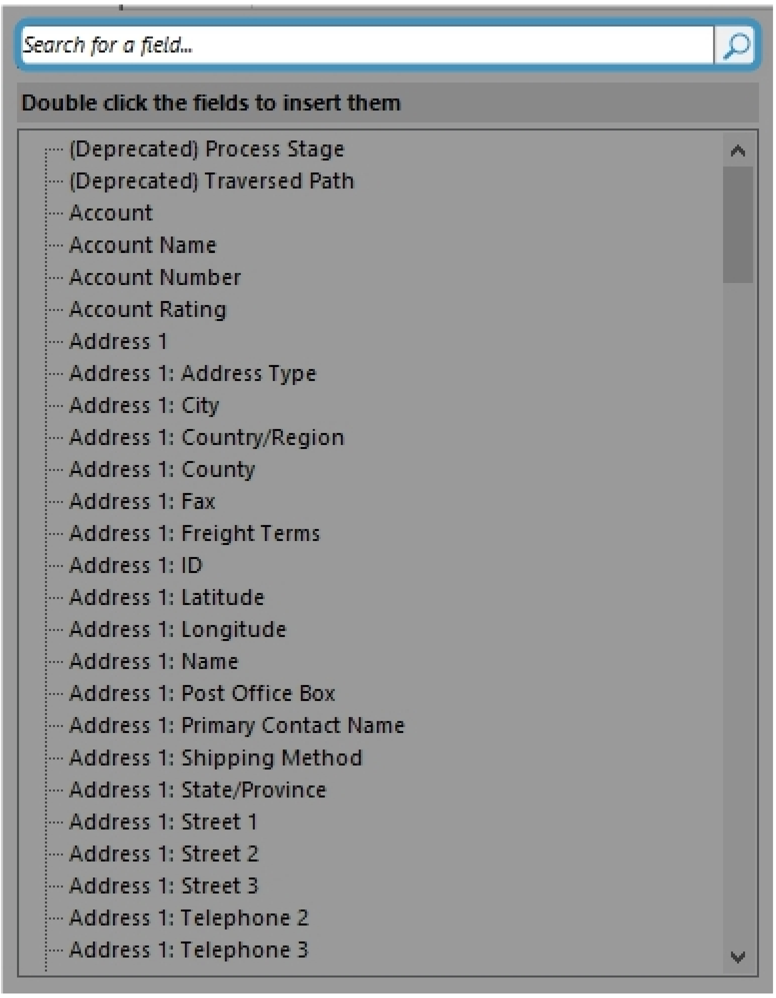


Figure 17: Search Field

All fields that match the set 1 search term will be listed in a 2 filtered view. To undo the search and see all available fields hit the 3 **X** button.

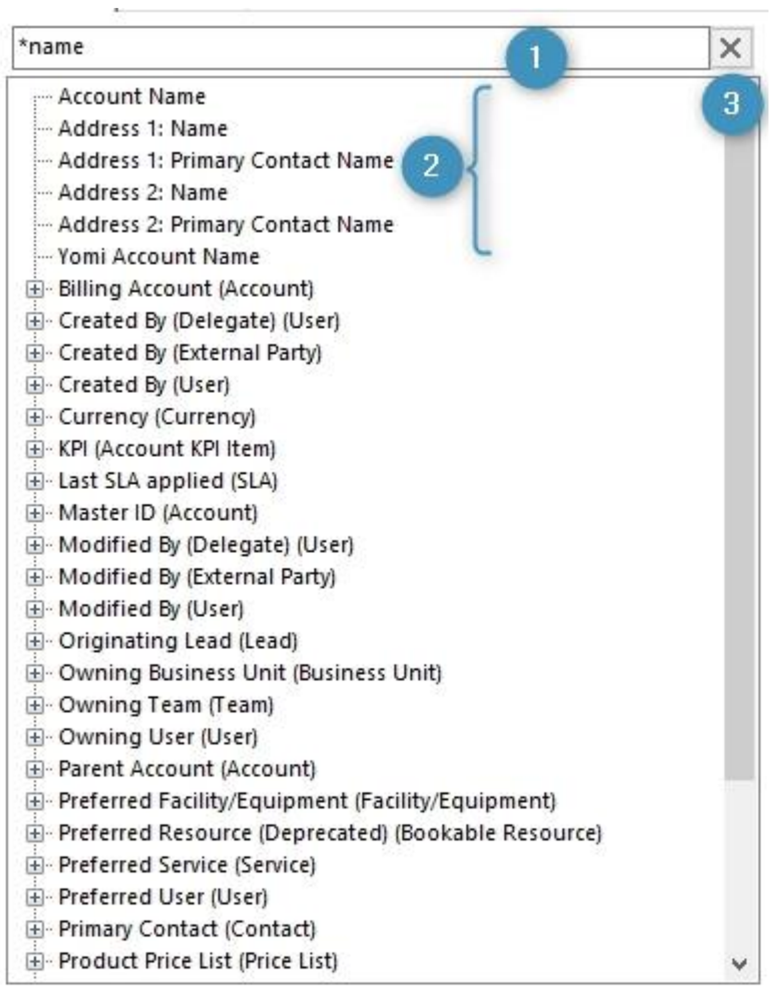


Figure 18: Search Result

1.9. Tree View

The Attributes TreeView displays all available attribute fields of the entity that had been previously selected with the Type Selector. The fields are listed in a TreeView in the root section. Additionally, all related 1:N relationships from the Dynamics 365 entity are displayed in the Standard Tab.

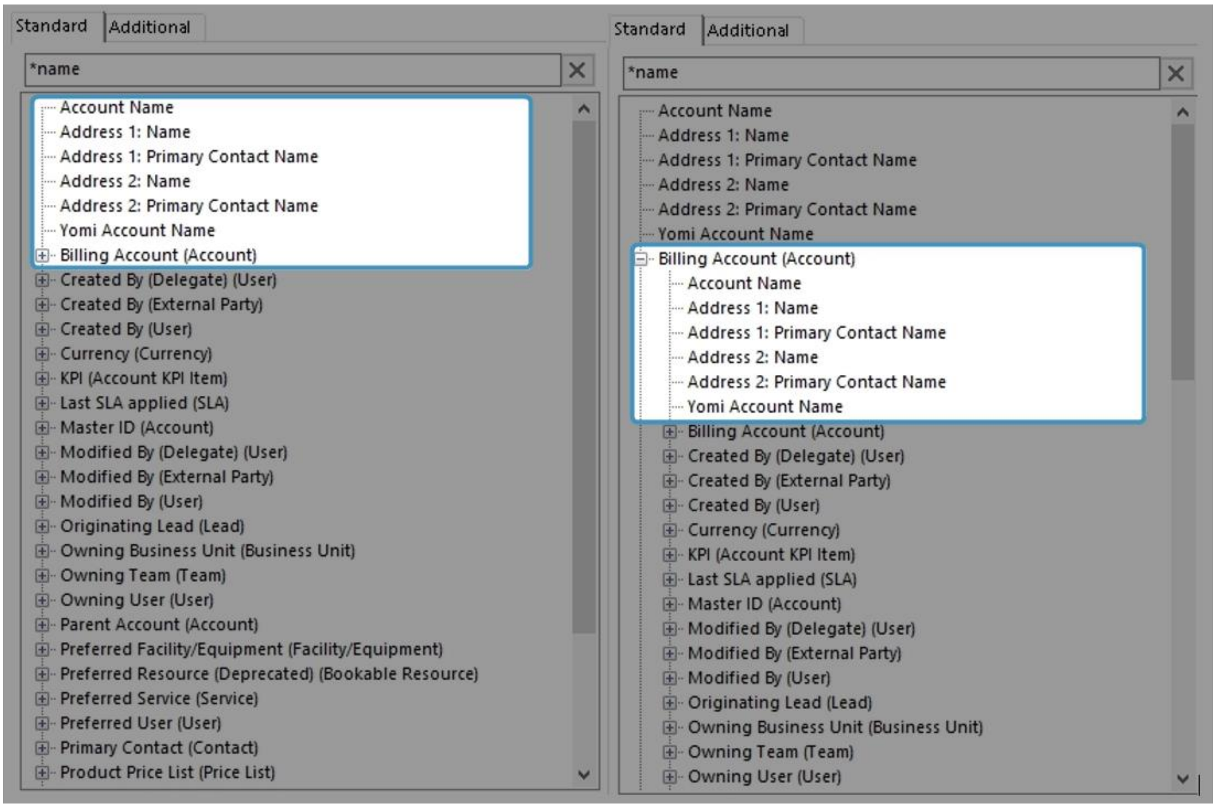


Figure 19: Standard Fields and Standard Fields of Lookup

The additional tab does not show the 1:N relationships automatically, as the relationship for the additional tab is defined separately.

1.10. Insert Field button

The ① **Insert Field** button is located at the bottom of your **DocumentsCorePack TemplateDesigner**. When you click on the button, it automatically inserts the chosen field directly into your document. By utilizing the ② drop-down menu, you can select and insert specific types of fields into your template.

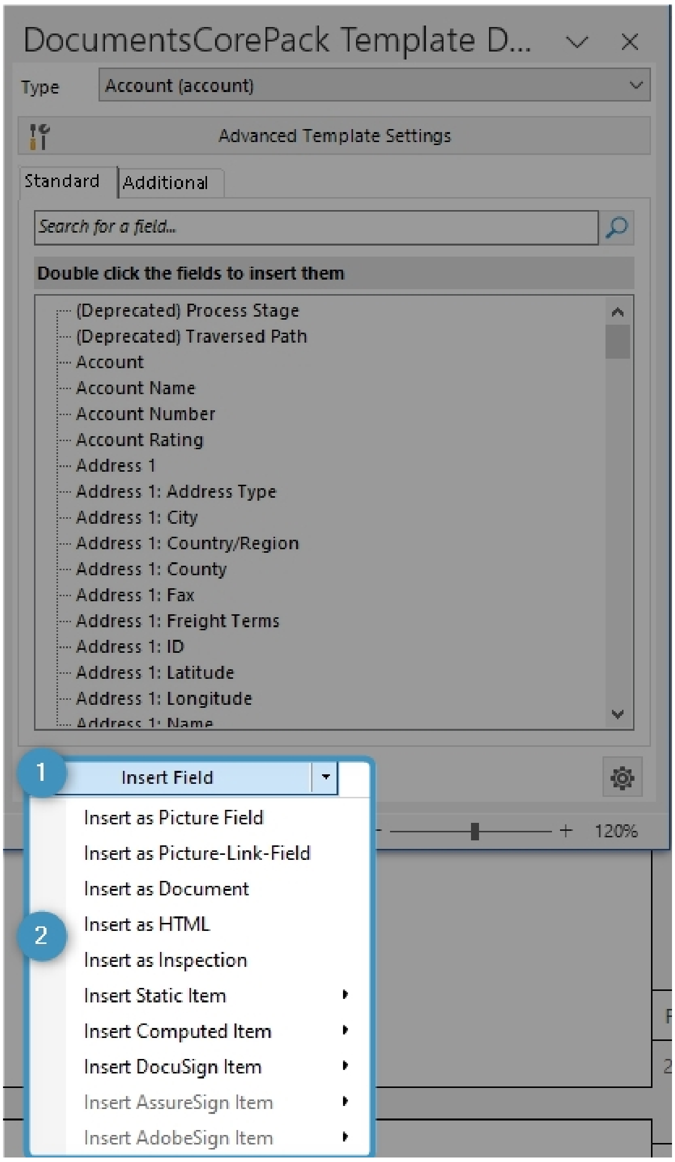


Figure 20: the Insert Field button

1.10.1 Insert as Picture Field

This option will insert a placeholder for an image. The image source can be a path to a document. The image will then be embedded into the document.

Please note: This option is not recommended when the generated document will be further used as a source for an E-mail, as most E-mail clients are not able to display base64 embedded images, or they do not allow this type of embedded image as they can be used for malicious attacks.

1.10.2 Insert as a Picture-Link-Field

This option will insert a placeholder for an image. The image path should be accessible from all over the network or the web.

Please note: This option is recommended if you would like to insert dynmaics pictures in your document based on data in Dynamics 365.

1.10.3 Insert as Document

This option will insert a document that has been previously attached as a note in Dynamics 365.

Please note: Attaching a document as a note works similarly to attaching a picture as a note, but of course, you must replace the picture with a document.

1.10.4 Insert as HTML

This feature enables you to easily insert content (pictures, texts, etc.) into documents that have been added to a Dynamics 365 record in HTML format, via the rich text editor. This functionality interprets HTML code stored in Dynamics 365 and displays the content appropriately in generated documents.

Prerequisites: Before you can use this functionality, it is required to support HTML within Dynamics 365 itself. Next to 3rd party providers, Microsoft provides Out-of-the-Box capabilities to enter HTML via the **rich text** control as described here.

1.10.5 Insert as Inspection

Inspections are digital forms that are used to answer a list of questions as part of a Work Order. Use cases for such questionnaires can include safety protocols, pass-and-fail tests for a customer asset, an interview with a customer, or other audits and assessments performed before, during, or after a work order.

Dynamics 365 supports an export to PDF function for when you want to integrate your inspection into a work order template. With this function you can also have more flexibility regarding the file type and design to overcome known limitations of the default PDF export.

To work with the Field Service Inspection responses as part of Dynamics 365, you need at least version 10.38 of the Template Designer, and the version 2020.132 of the DocumentsCorePack Server.

1.10.6 Insert Static Item

This option has two main purposes. It will insert static documents and it also includes the possibility to format and structure the document.

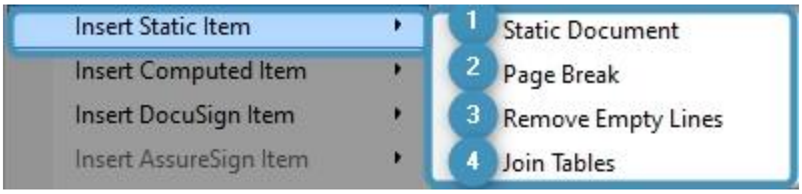


Figure 21: Insert Static Item options

① **Insert Static Document**: This option allows you to insert a sub template into your current template. It was also designed to insert further text documents, such as General Terms and Conditions.

② **Insert Page Break**: This option enables you to insert a dynamic page break into your document. The Insert Page Break option also works with the table. If you, for example, have a table with product information and you insert a **Page Break** item, you will automatically get an extra page for each product as a result.

③ **Remove Empty Lines**: It is a simple way to dynamically structure your document after a merge process. For example, if you want to delete unnecessary lines between contacts and opportunities, simply insert a **Remove Empty Lines** field. This option enables you to insert dynamic **Remove Empty Lines** fields into your document.

④ **Join Tables**: This option combines tables.

1.10.7 Insert Computed Item

This option empowers users to make basic arithmetic operations with Dynamics 365 number fields.

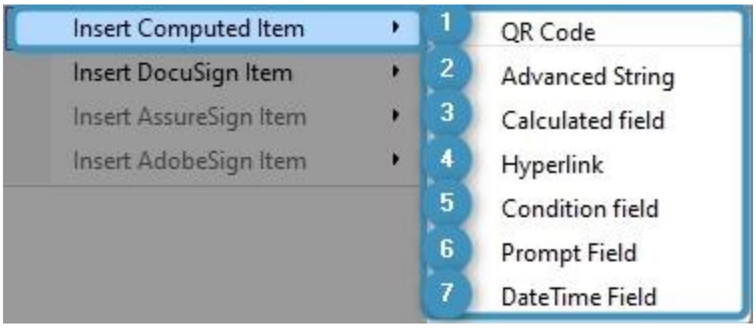


Figure 22: Insert Computed Item

① **Insert QR Code**: A QR code is a two-dimensional barcode that can store a lot of information, including text, URLs, phone numbers, email addresses, and more. When you scan a QR code using your smartphone's camera, or another device, the code is decoded and the information it contains is displayed on your screen. By using the Insert QR Code field, you can establish a design for a QR code that is generated dynamically.

❷ **Insert Advanced String**: The Advanced String property allows you to define a pattern for a dynamically created string.
❸ **Insert Calculated Field**: The Computed Field property is a feature that lets you perform calculations using data from Dynamics 365. It's a way to automatically calculate values based on other data in your system, without having to manually perform the calculations yourself.

❹ **Hyperlink**: Allows you to add data from your Dataverse into links placed inside a document. Currently, only base types are supported, and taxonomy properties are not supported.

❺ **Insert Condition Field**: Conditional Formatting is an enhanced component of the Condition feature within DocumentsCorePack. While the regular Condition functionality determines whether to include or exclude a field in your document, the conditional formatting preserves the existing format or applies an alternative format based on a Word style sheet.

❻ **Insert Prompt Field**: Prompts enable users to add or modify document elements without opening the document. The options for prompts are displayed in an additional window of the DocumentsCorePack dialog.

❼ **Insert DateTime Field**: The **DateTime** option allows you to perform basic calculations with dates. You can add a certain amount of time to a current date or calculate the difference between two dates.

1.10.8 Insert DocuSign Item

DocuSign is another tool that simplifies the world of **e-signatures**. It empowers you to electronically sign documents.

1.10.9 Insert AssureSign Item

AssureSign is another tool that simplifies the world of **e-signatures**. It empowers you to electronically sign documents.

1.10.10 Insert AdobeSign Item

Adobe Sign is another tool that simplifies the world of **e-signatures**. It empowers you to electronically sign documents.

1.11. TaskPane Settings

The TaskPane settings allow you to modify some of the behaviors of the TreeView containing the Dynamics 365 attributes.

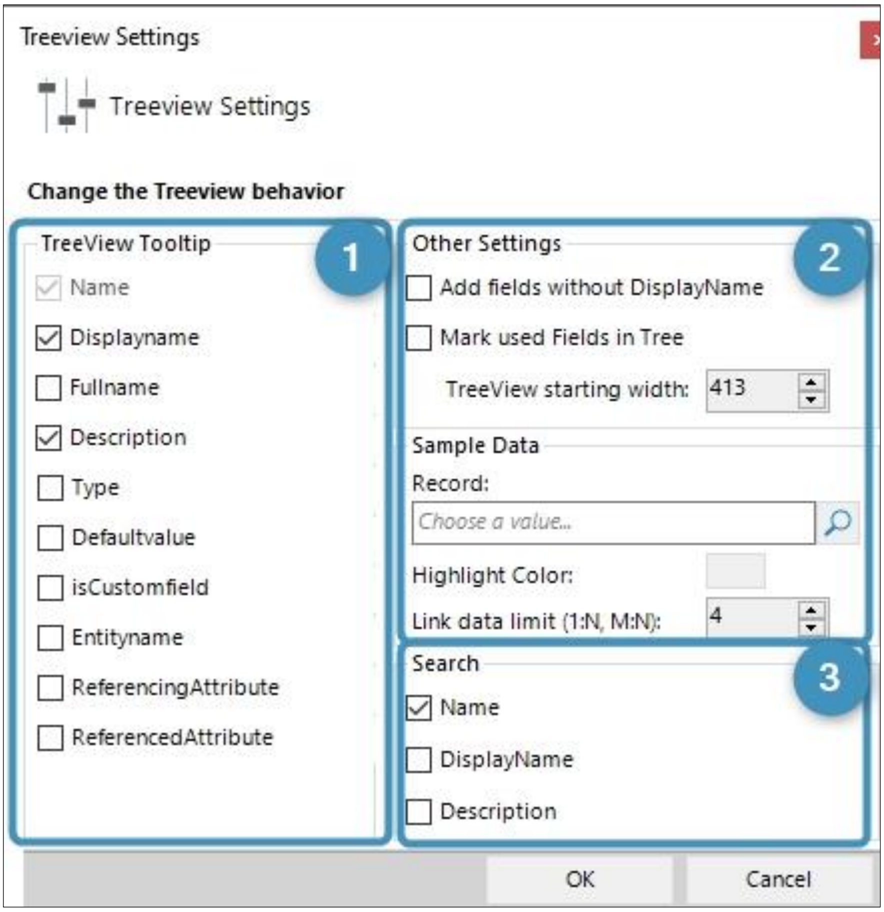


Figure 23: TaskPane Settings

❶ **Tooltip Options**: A list of available additional information allows you to select the information about the field that you would like to see in the tooltip of the field.

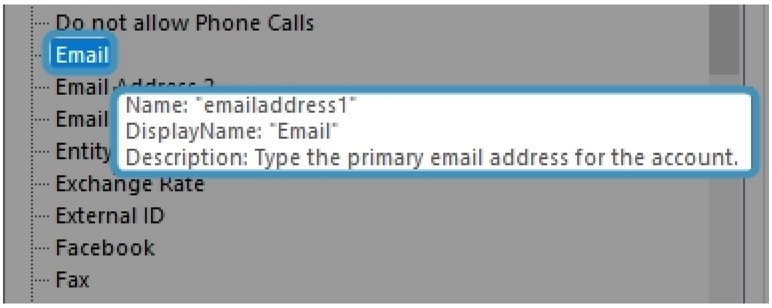


Figure 24: Tooltip of field in the attributes tree view

❷ **Other Settings**:

- **Add fields without Display name**: Certain fields in Dynamics 365 are not intended to be used on Dynamics 365 forms and therefore do not have a Display name. Nevertheless, you might have the requirement to use those fields in your template. With this option, you can enable these fields. The schema name will begin with * (asterisk).
- **Mark used fields in TreeView:** If a field is already used in the document, it will be bold.
- **TreeView starting width:** Allows setting the width in pixels when the TaskPane is opened in Word.

❸ **Search Options**:

- The available list of fields (Name, Displayname, Description) allows you to define what information of the Dynamics 365 field should be included in the search.
- The Name is the schema name in Dynamics 365 which is usually an internal identifier (Example: emailaddress1).
- The DisplayName is the label which is also used on a Dynamics 365 form (Example: Primary Email).
- The Description is the text block that contains additional information about the field. (Example: the purpose or usage of the field).

1.12. Field Properties

When mapping fields from Dynamics 365 (Dataverse), you might need to show the data in a specific format, for example, currency or date formats. Learn more in this chapter.

In addition to simply using the format defined in Dynamics 365, custom format options can be directly set via the **Field properties** from the **mscrm-addons.com** tab.

Depending on the type of field, different format options are provided:

1.12.1 Number and Money Fields

You can set the format of number and money fields, e.g., currency needs to be adjusted due to global enterprises.

1.12.2 Date and Time Fields

This section shows the formatting options for **DateTime** fields within the **Field properties** of the **mscrm–addons.com** tab.

1.12.3 Delete line/row if whole line/row is empty & Delete line/row if a field is empty

To keep your documents compact, it is recommended to avoid empty lines within your documents. For example, think of an address block where some customers use the Address Line 2 field, but others do not. To ensure a compact output, you want to avoid empty lines for those who do not use the field.

1.12.4 Two Options & OptionSets

For OptionSets (Two Options), the properties allow you to either use the internal value or display of the selected option.

Use internal value: When defining a custom format, it is required to ensure that the formatting is applied to the plain value, for example, 10000 instead of the formatted value € 10,000.00. Hence, this setting is automatically checked when defining a format within the Field properties.

1.12.5 General Formatting in Microsoft Word

Word provides different options to format fields. The following article provides an overview on possibilities provided.

2. DocumentsCorePack Template Designer Advanced

The following chapters provide you with an overview of the advanced capabilities of the Template Designer. They focus on the following options:

- Relationship Manager
- Add entities

2.1. Relationship Manager

The **Relationship Manager** in DocumentsCorePack is a feature that can help simplify the creation of templates. By offering a variety of predefined relationships and allowing for additional predefined relationships to be created, the **Relationship Manager** can simplify the creation of templates by pre-defining commonly used relationships.

To open it, simply open the 1 **Add Relationship/Entity** drop-down menu in the DocumentsCorePack 2 **Additional** tab and select the option 3 **Manage relationships** in the menu you are provided with.

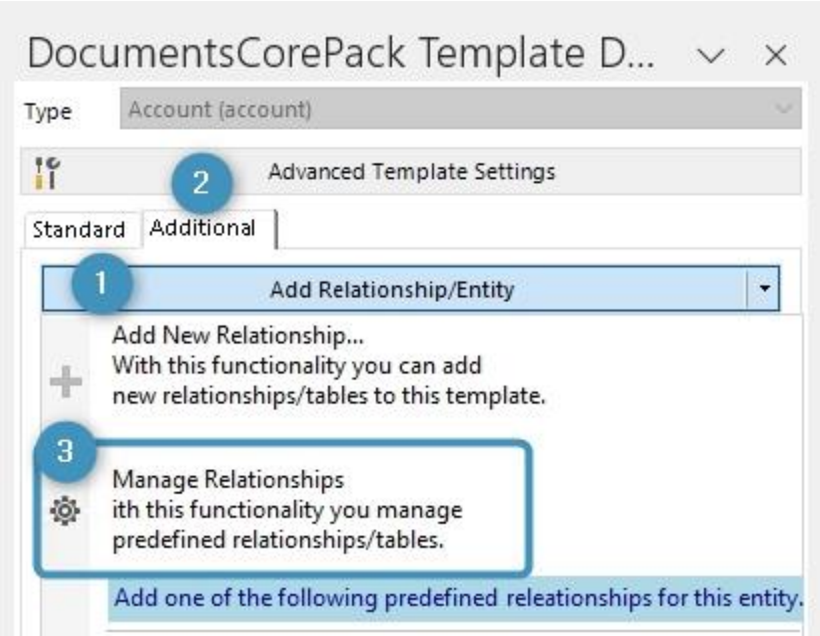


Figure 25: Open Relationship Manager

2.2. Relationship Manager Window

All customizations for tables and relationships can be done here.

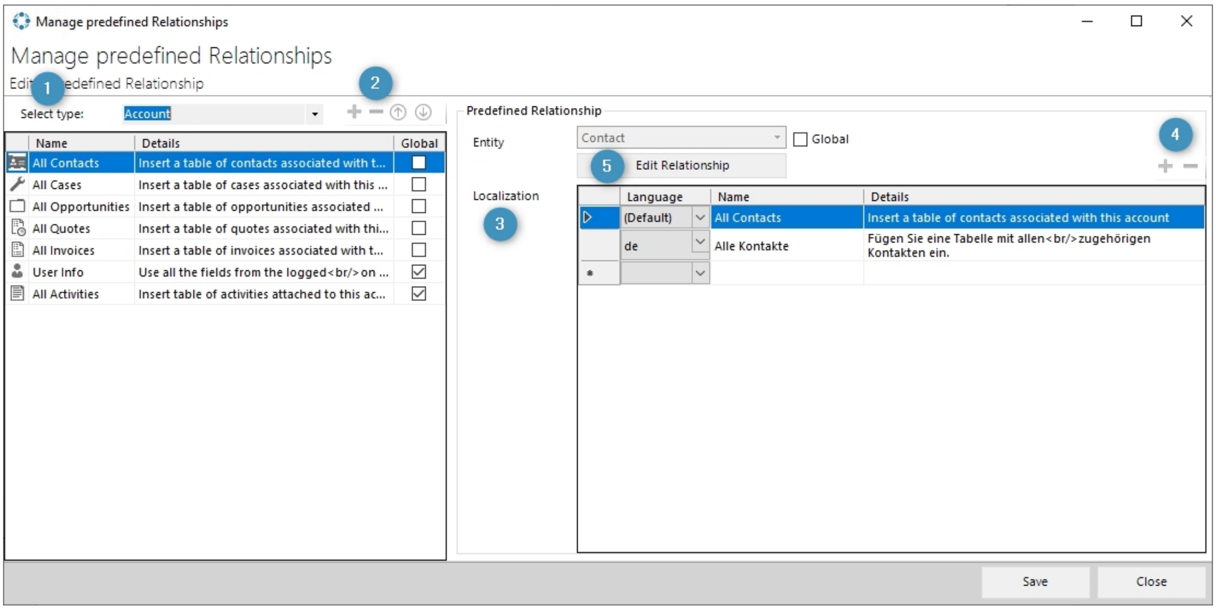


Figure 26: Manage predefined relationships

❶ **Select type drop-down**: In the select type drop-down menu, you can select which type of entity you would like to work with.

❷ **Plus-, Minus-, Up-, and Down-button**: Additional predefined relationships can be created **(+)**, deleted **(-)**, and determined, in which **(↑,↓)** order the relationships should appear.

❸ **Localization**: this list allows you to define a name and description for the predefined relationship for every language available in Dynamics 365.

❹ Add or delete a new field in the localization list.

❺ **Edit Relationship**: Allows to specify all details of the relationship (what fields should be retrieved, sorting filtering;).

3. Advanced Template Options

Besides the standard options, the DocumentsCorePack Template Designer offers additional options to facilitate the designing of templates, such as:

- Advanced syntax structures
- Calculate (advanced) arithmetic issues

The following chapters provide you with an overview of the advanced template options.

3.1. DocumentsCorePack Template Designer Property Syntax and Designer options

Certain properties of DocumentsCorePack templates can consist of fixed text and Dynamics 365 fields. There are also some additional functions available. In addition, data from Dynamics 365 can be manipulated.

Several DocumentsCorePack properties support the same syntax. The two major different syntax types are **strings** and **calculations**.

Conditions can now be easily edited with the new Condition Designer.

3.1.1 Strings (Basic Syntax)

The basic syntax for string properties follows the rules below. The fixed text has to be typed manually in the text field and has to be enclosed with single quotes (" **'** ").

The fixed text has to be typed manually in the text field and has to be enclosed with single quotes (" **'** ").

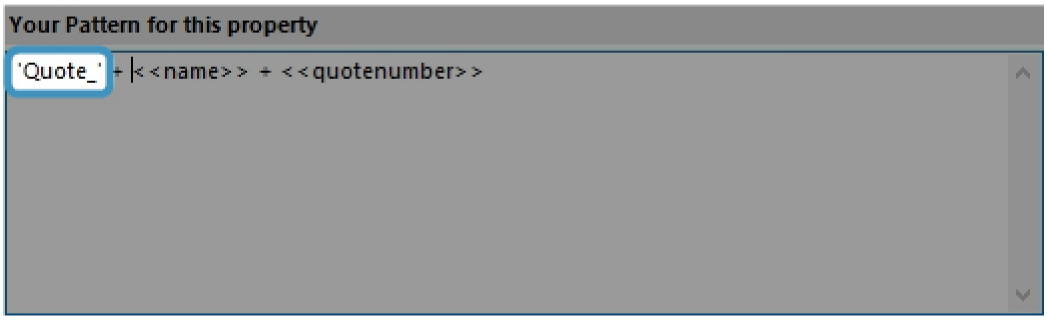


Figure 27: Property Syntax - Fixed Text

Fields from Dynamics 365 are enclosed by **<<** and **>>** when you insert them from the tree view.

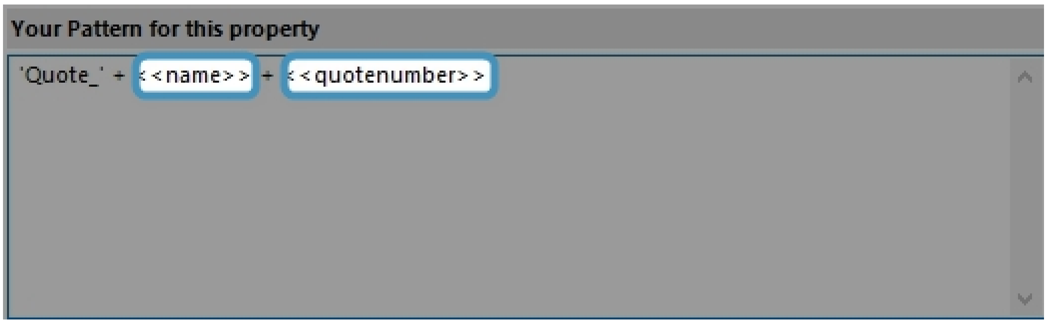


Figure 28: Porperty Syntax – Fields

To combine several Dynamics 365 fields and fixed text, you must use the plus sign ("**+**").

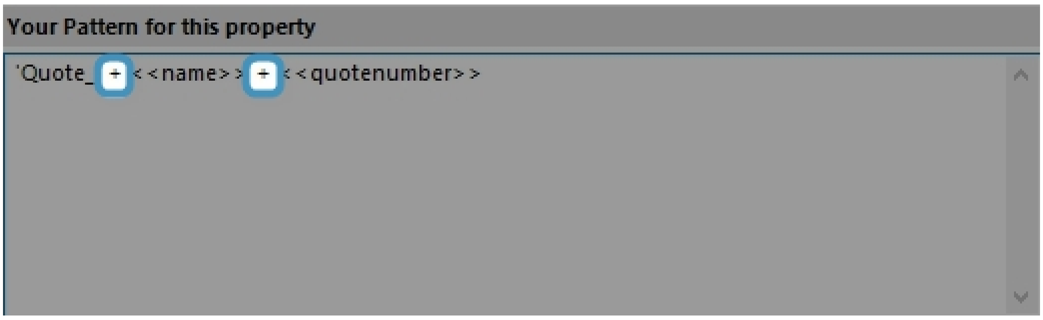


Figure 29: Property Syntax - Plus signs

3.1.2 Strings (Advanced Syntax)

Function calls can be applied to Dynamics 365 fields by using "." and the actual function call. There are also stand-alone method calls supported. The function call must end with brackets. Certain functions also support parameters or have mandatory parameters.

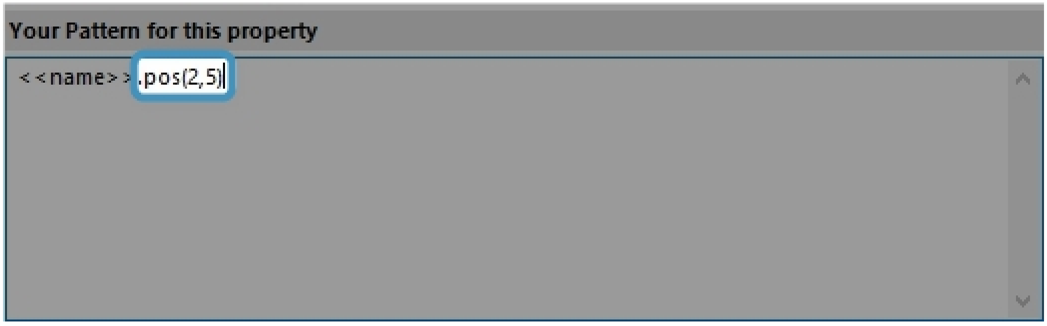


Figure 30: Property Syntax - function call pos with parameters 2 and 5

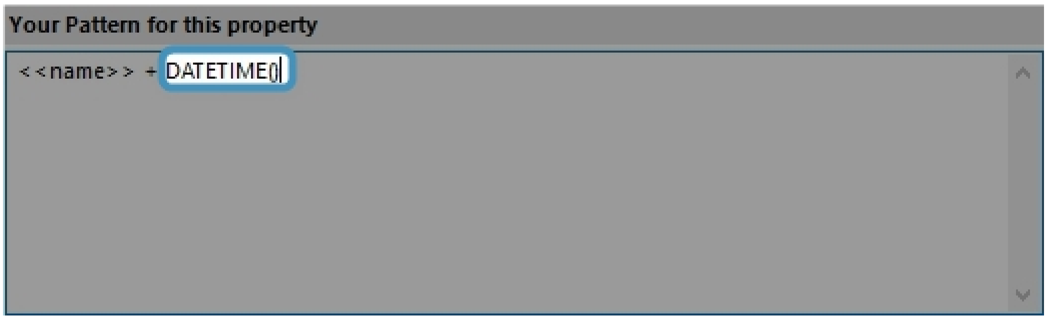


Figure 31: Property Syntax - Stand Alone Function DATETIME without parameters

The following table contains a list with all available functions that can be applied to Dynamics 365 fields. For all examples below, please assume the <<**name**>> field will be **MSCRM-addons.com** after the merge.

Function	Description	Example
<<name>>.pos(x,y)	will insert y signs from the xth position.	<<name>>.pos(2,5) Result: "CRM-a"
<<name>>.left(x)	will insert the first x – signs.	<<name>>.left(5) Result: "MSCRM"
<<name>>.right(x)	will insert the last x signs of the string.	<<name>>.right(3) Result: "com"
<<name>>.upper()	displays all values in the field in capital letters.	Result: "MSCRM-ADDONS.COM"
<<name>>.lower()	displays all values in the field in lowercase letters.	Result: "mscrm-addons.com"
<<name>>.caps()	displays the first letter in the field as a capital letter.	Result: "Mscrm-addons.com"
<<name>>.firstcaps()	displays the first letter in a sentence as a capital letter.	Result: Mscrm-addons.com
<<name>>.invert()	reverses every case.	Result: "mscrm-ADDONS.COM"

Figure 32: List of function calls for fields

The following table contains a list with all available functions that can stand alone to Dynamics 365 fields.

Function	Description	Example
guid()	Generates a unique serial number.	b8a4d649-342e-4bfc-9a6f-b4afd4741b4
DATETIME()	Inserts the actual and local date and time.	8.23.2023 14:31
DATETIME(DD.MMMM.YY mm:ss, de-DE)	There are many different formatting options for displaying the culture name for different countries.	23.August.2314:31
DATETIME(DD.MMMM.YY ' ' mm:ss, de-DE)	Different Cultures can be displayed. Learn more.	23.August.23 14:31

Figure 33: List of Stand-Alone functions

3.1.3 Calculations

The syntax for this field supports the following basic arithmetic operations:

/	divide
*	multiply
+	add up
-	subtract

3.1.4 Condition Designer

The Condition Designer has a similar look and feel to the standard **Advanced Find** dialog in Dynamics 365. The available options are also similar. The Designer is part of the **Condition Field functionality** of DocumentsCorePack.

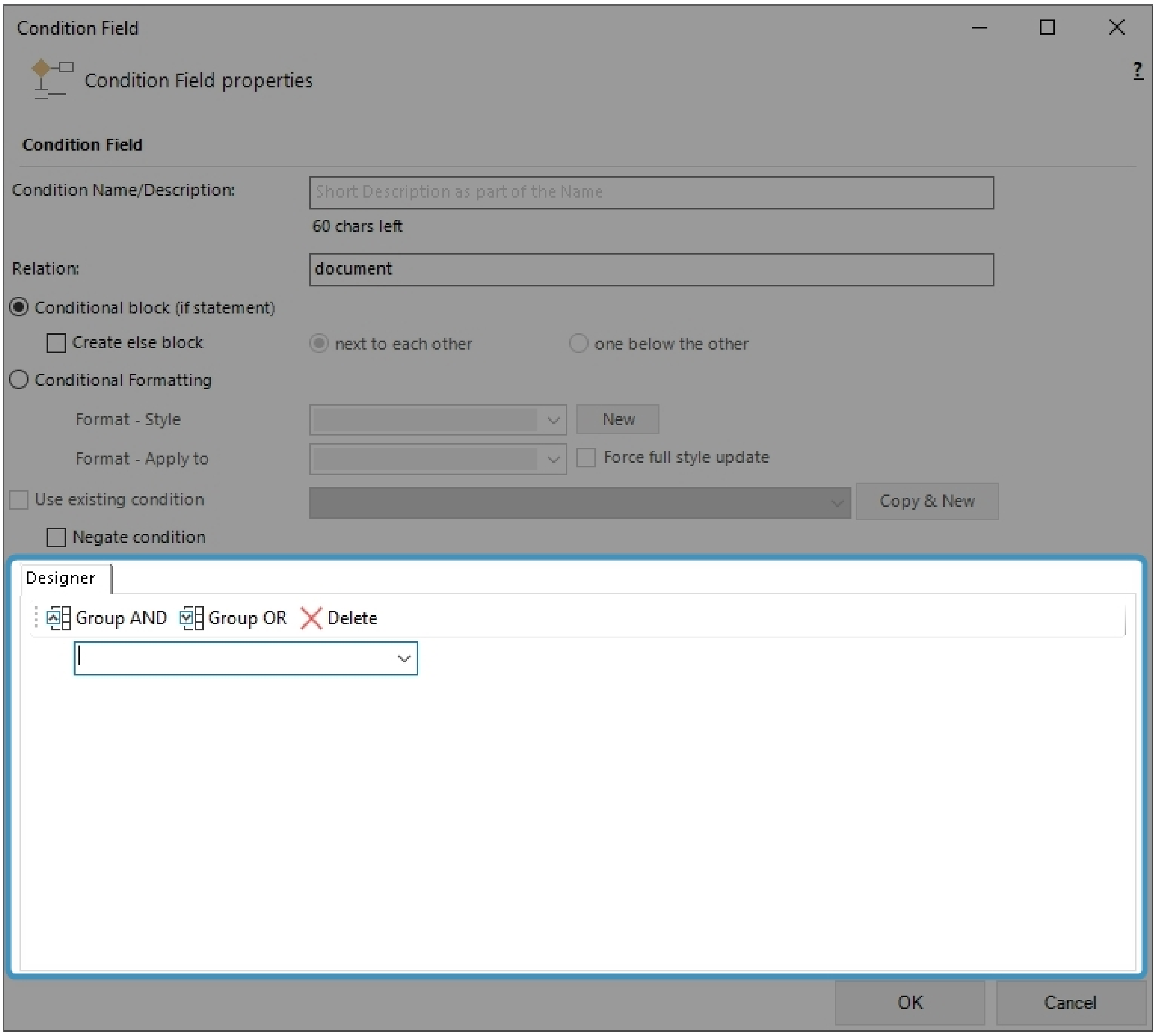


Figure 34: the Condition Designer within the Condition Field dialog

To create your condition, you must select an operator. Depending on the field type, you will see different available operators.

Next, select or enter a compare value.

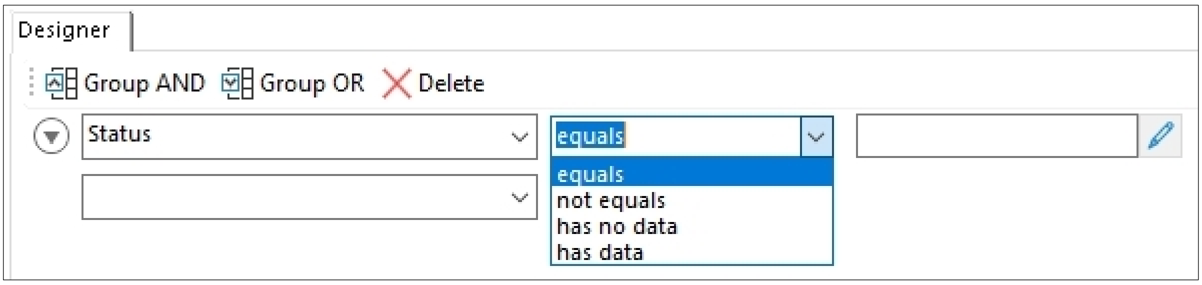


Figure 35: Operator Selection

Depending on the data type of the field, you either have 1 an additional control that opens a new 2 dialog to select and compare values. Or you can enter the value directly by typing.

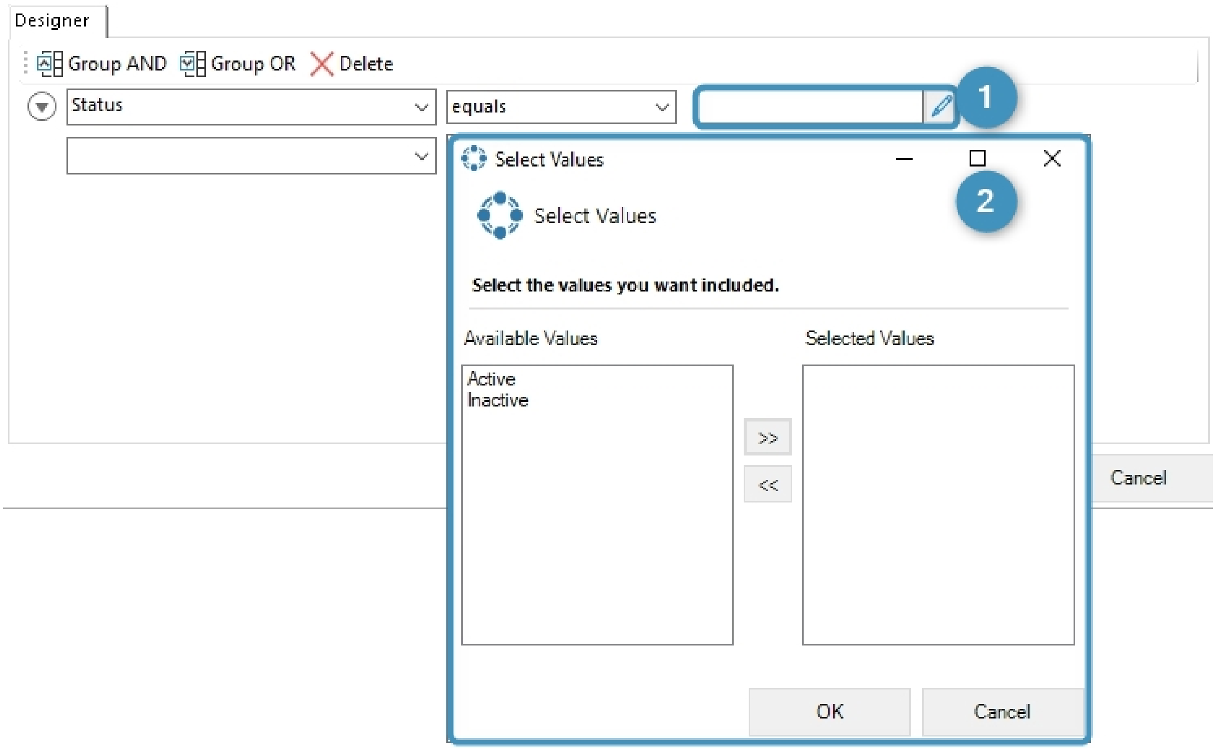


Figure 36: Selection dialog for picklist elements

Date Field

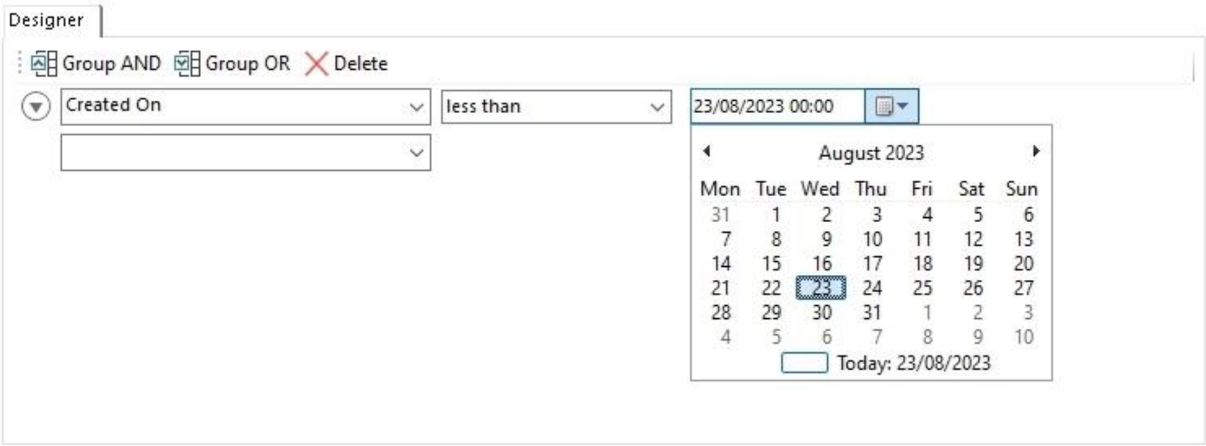


Figure 37: Example of a date field

String Field

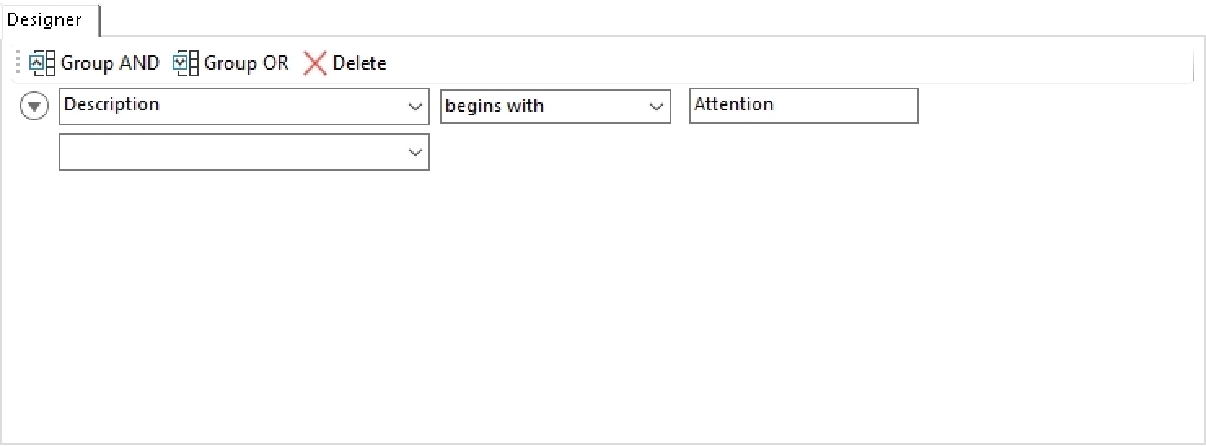


Figure 38: Exmaple for a string field

Please note: All single lines are brought together to one single condition.

Group your lines (**optional**). To do this, select the required rows by using the 1 menu that opens when you hit the arrow button.

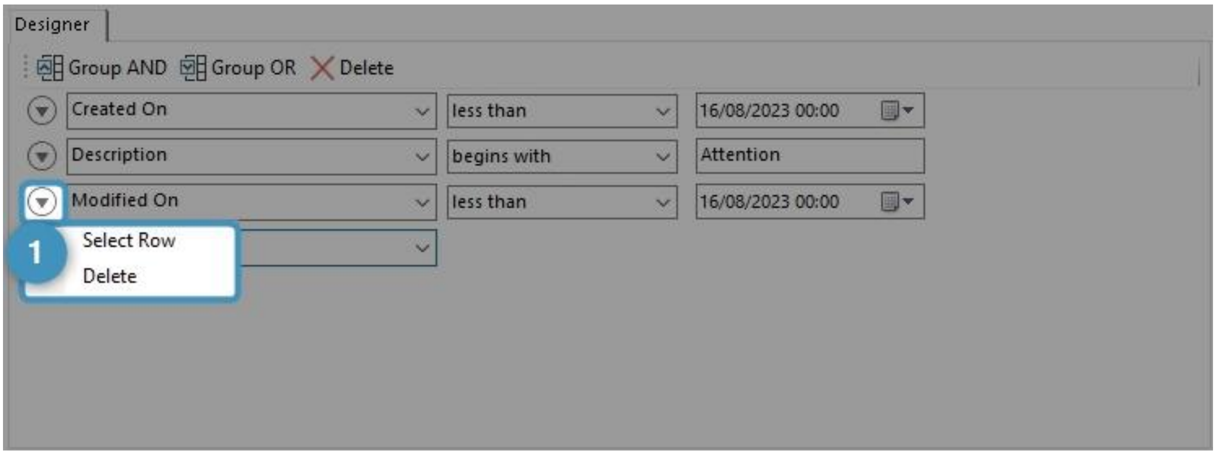


Figure 39: Select Row

The selected rows will stay 2 highlighted. Select the required 3 grouping option.

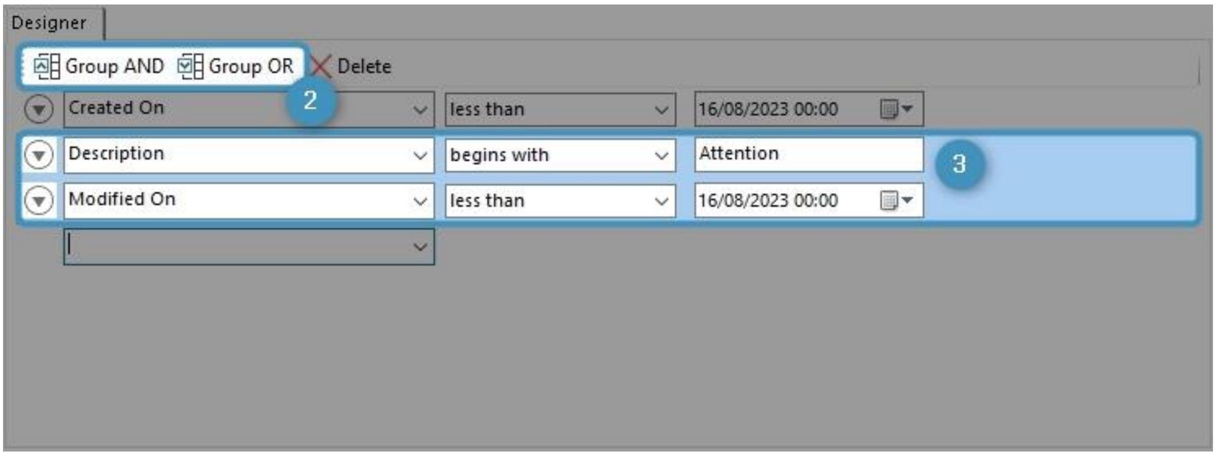


Figure 40: Selected Rows with Grouping options

After selecting grouping, a box will visually show the grouping.

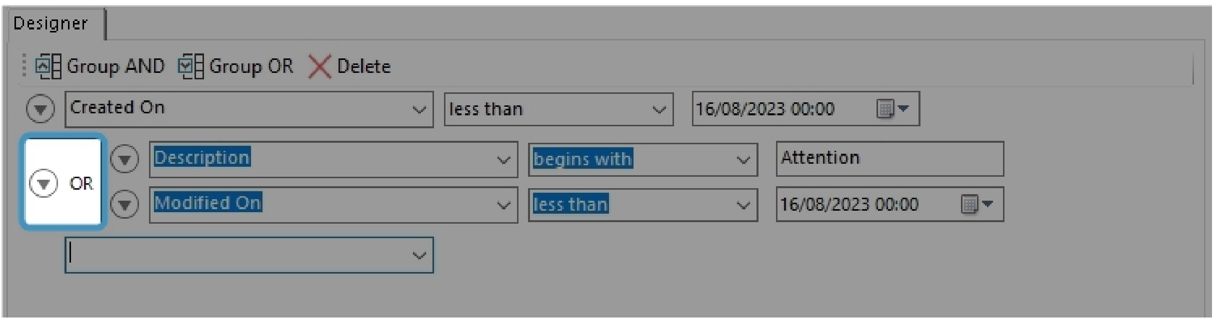


Figure 41: Result after grouping

3.1.5 DateTime Field Syntax

The **DateTime Field** option of DocumentsCorePack allows you to perform basic calculations on dates and times. This article describes the syntax that can be used for those calculations.

The Basic Syntax

Fields from Dynamics are enclosed by "<<" and ">>" when you insert them from the tree view.

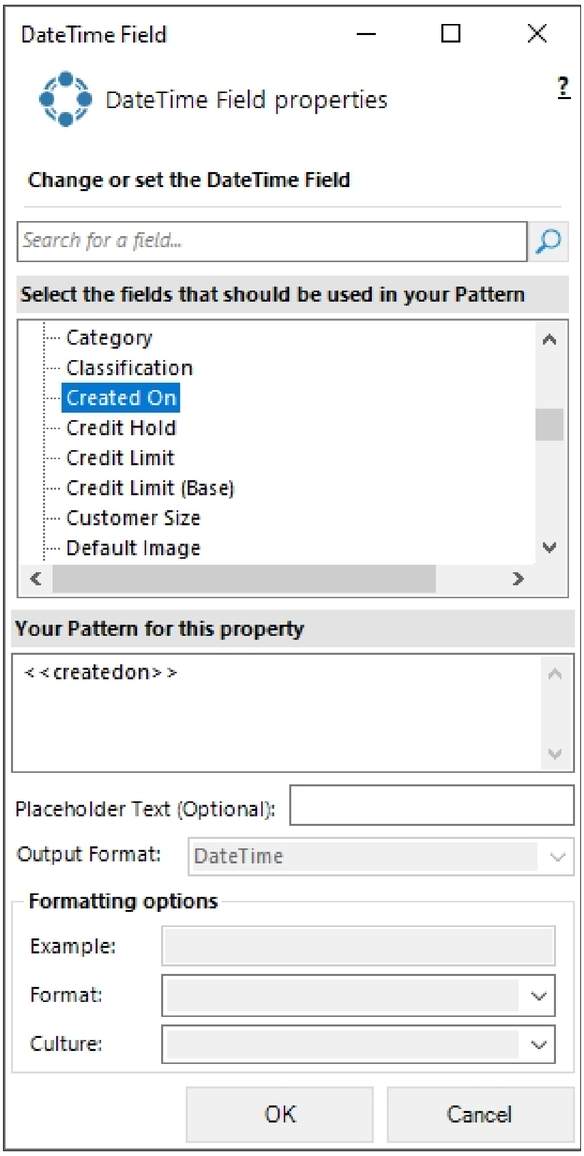


Figure 42: DateTime Field

Date Substraction

The difference between two dates can be subtracted by using a “-”.

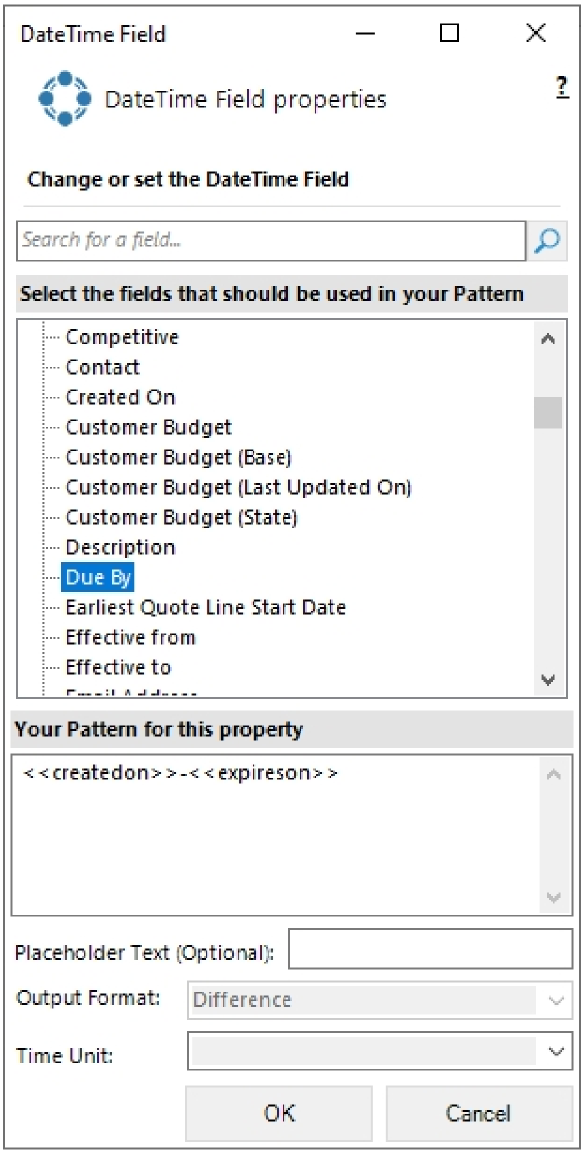


Figure 43: Difference between two dates

Executing Functions

Functions on a date can be executed by adding a dot “**.**” and the function name including the necessary parameters.

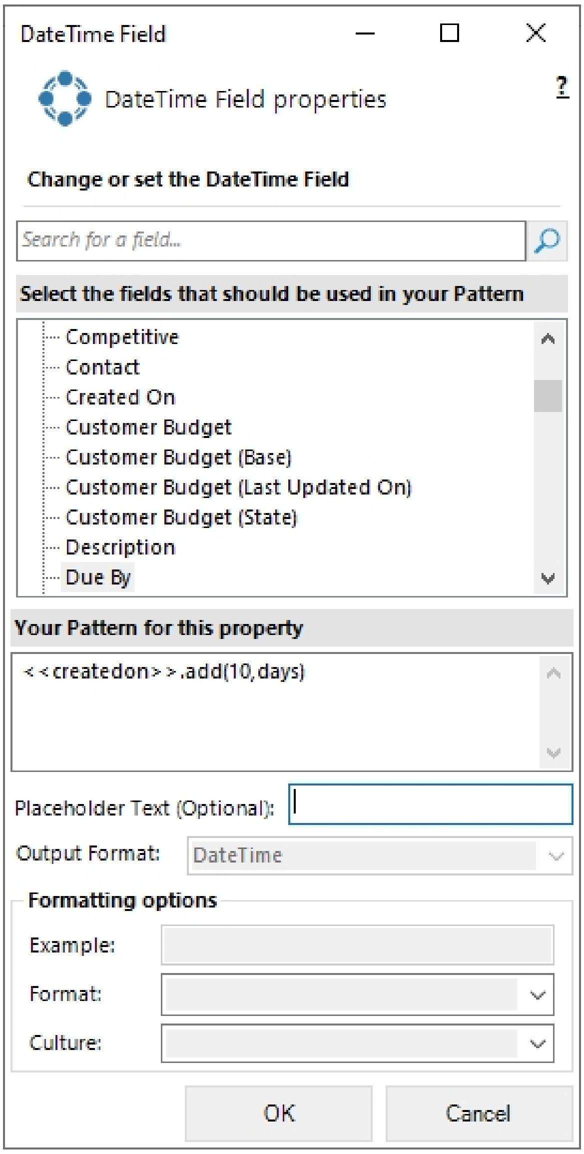


Figure 44: Function call with parameters

Supported Functions and Operators

Operator Name	Sign	Example
Difference	-	<<duedate>> – DATETIME() Example: An offer with a due date minus today´s data to calculate.

Figure 45: Operator table

Function	Description	Examples
Add(value, unit)	Adds a numeric value to the current date. The first parameter represents the numeric value that should be added. The second parameter represents the unit. Parameters for units are either: year, month, weeks, days, hours, minutes, seconds, milliseconds	<>.Add(10,year)
Subtract(value, unit)	Subtracts a numeric value from the current date. The first parameter represents the numeric value that should be subtracted. The second parameter represents the unit. Parameters for units are either: year, month, weeks, days, hours, minutes, seconds, milliseconds	<>.Subtract(10,year)
Addbusinessdays(value)	Adds a certain amount of days to the current date. Weekends (Saturday and Sunday) are excluded from this calculation.	<>.Addbusinessdays(10)
Round(unit, direction)	Round allows you to modify a time value to the next or previous quarter, half or full hour. The first parameter can display a quarter, half or full hour. The second parameter represents the direction. (up/down)	<>.Round(quarter,up) <>.Round(half,down) <>.Round(full)
DATETIME()	This call returns the current date and can be used as a field followed with any of the above method calls.	DATETIME().add(5,days)

Figure 46: Function table

Please note: You cannot join several function calls. If you would like to add days and months, please always use the lowest unit for your call. For example, 1 Month and 15 Days would be 45 Days.

3.2. Additional field specific formatting capabilities

This chapter provides you with an overview of the additional field specific formatting capabilities of the DocumentsCorePack Template Designer.

3.2.1 Date fields

This table provides you with an overview of all possible additional date field customizations.

Format specifier	Description	Example
"d"	The day of the month, from 1 through 31.	6/1/2009 1:45:30 PM -> 1 6/15/2009 1:45:30 PM -> 15
"dd"	The day of the month, from 01 through 31.	6/1/2009 1:45:30 PM -> 01 6/15/2009 1:45:30 PM -> 15
"ddd"	The abbreviated name of the day of the week.	6/15/2009 1:45:30 PM -> Mon (en-US) 6/15/2009 1:45:30 PM -> Пн (ru-RU) 6/15/2009 1:45:30 PM -> lun. (fr-FR)
"f"	The tenths of a second in a date and time value.	6/15/2009 13:45:30.617 -> 6 6/15/2009 13:45:30.050 -> 0
"ff"	The hundredths of a second in a date and time value.	6/15/2009 13:45:30.617 -> 61 6/15/2009 13:45:30.005 -> 00
"fff"	The milliseconds in a date and time value.	6/15/2009 13:45:30.617 -> 617 6/15/2009 13:45:30.0005 -> 000
"ffff"	The ten-thousandths of a second in a date and time value.	6/15/2009 13:45:30.6175 -> 6175 6/15/2009 13:45:30.00005 -> 0000
"fffff"	The hundred-thousandths of a second in a date and time value.	6/15/2009 13:45:30.61754 -> 61754 6/15/2009 13:45:30.000005 -> 00000
"ffffff"	The millionths of a second in a date and time value.	6/15/2009 13:45:30.617542 -> 617542 6/15/2009 13:45:30.0000005 -> 000000

"fffffff"	The ten-millionths of a second in a date and time value.	6/15/2009 13:45:30.6175425 -> 6175425 6/15/2009 13:45:30.0001150 -> 0001150
"F"	If non-zero, the tenths of a second in a date and time value.	6/15/2009 13:45:30.617 -> 6 6/15/2009 13:45:30.050 -> (no output)
"FF"	If non-zero, the hundredths of a second in a date and time value.	6/15/2009 13:45:30.617 -> 61 6/15/2009 13:45:30.005 -> (no output)
"FFF"	If non-zero, the milliseconds in a date and time value.	6/15/2009 13:45:30.617 -> 617 6/15/2009 13:45:30.0005 -> (no output)
"FFFF"	If non-zero, the ten-thousandths of a second in a date and time value.	6/1/2009 13:45:30.5275 -> 5275 6/15/2009 13:45:30.00005 -> (no output)
"FFFFF"	If non-zero, a hundred-thousandths of a second in a date and time value.	6/15/2009 13:45:30.61754 -> 61754 6/15/2009 13:45:30.000005 -> (no output)
"FFFFFF"	If non-zero, the millionths of a second in a date and time value.	6/15/2009 13:45:30.617542 -> 617542 6/15/2009 13:45:30.0000005 -> (no output)
"FFFFFFF"	If non-zero, the ten-millionths of a second in a date and time value.	6/15/2009 13:45:30.6175425 -> 6175425 6/15/2009 13:45:30.0001150 -> 000115
"g", "gg"	The period or era.	6/15/2009 1:45:30 PM -> A.D.
"h"	The hour, using a 12-hour clock from 01 to 12.	6/15/2009 1:45:30 AM -> 1 6/15/2009 1:45:30 PM -> 1
"hh"	The hour, using a 12-hour clock from 01 to 12.	6/15/2009 1:45:30 AM -> 01 6/15/2009 1:45:30 PM -> 01
"H"	The hour, using a 24-hour clock from 0 to 23.	6/15/2009 1:45:30 AM -> 1 6/15/2009 1:45:30 PM -> 13
"HH"	The hour, using a 24-hour clock from 00 to 23.	6/15/2009 1:45:30 AM -> 01 6/15/2009 1:45:30 PM -> 13

"K"	Time zone information.	With DateTime values: 6/15/2009 1:45:30 PM, Kind Unspecified -> 6/15/2009 1:45:30 PM, Kind Utc –> Z 6/15/2009 1:45:30 PM, Kind Local -> -07:00 (depends on local computer settings) With DateTimeOffset values: 6/15/2009 1:45:30 AM -07:00 --> -07:00 6/15/2009 8:45:30 AM +00:00 --> +00:00
"m"	The minute, from 0 through 59.	6/15/2009 1:09:30 AM -> 9 6/15/2009 1:09:30 PM -> 9
"mm"	The minute, from 00 through 59.	6/15/2009 1:09:30 AM -> 09 6/15/2009 1:09:30 PM -> 09
"M"	The month, from 1 through 12.	6/15/2009 1:45:30 PM -> 6
"MM"	The month, from 01 through 12.	6/15/2009 1:45:30 PM -> 06
"MMM"	The abbreviated name of the month.	6/15/2009 1:45:30 PM -> Jun (en-US) 6/15/2009 1:45:30 PM -> juin (fr-FR) 6/15/2009 1:45:30 PM -> Jun (zu-ZA)
"MMMM"	The full name of the month.	6/15/2009 1:45:30 PM -> June (en-US) 6/15/2009 1:45:30 PM -> juni (da-DK) 6/15/2009 1:45:30 PM -> uJuni (zu-ZA)
"s"	The second, from 0 through 59.	6/15/2009 1:45:09 PM -> 9
"ss"	The second, from 00 through 59.	6/15/2009 1:45:09 PM -> 09
"t"	The first character of the AM/PM designator.	6/15/2009 1:45:30 PM -> P (en-US) 6/15/2009 1:45:30 PM -> 午 (ja-JP) 6/15/2009 1:45:30 PM -> (fr-FR)
"tt"	The AM/PM designator.	6/15/2009 1:45:30 PM -> PM (en-US) 6/15/2009 1:45:30 PM -> 午後 (ja-JP) 6/15/2009 1:45:30 PM -> (fr-FR)
"y"	The year, from 0 to 99.	1/1/0001 12:00:00 AM -> 1 1/1/0900 12:00:00 AM -> 0 1/1/1900 12:00:00 AM -> 0 6/15/2009 1:45:30 PM -> 9
"yy"	The year, from 00 to 99.	1/1/0001 12:00:00 AM -> 01 1/1/0900 12:00:00 AM -> 00 1/1/1900 12:00:00 AM -> 00 6/15/2009 1:45:30 PM -> 09
"yyy"	The year, with a minimum of three digits.	1/1/0001 12:00:00 AM -> 001 1/1/0900 12:00:00 AM -> 900

		1/1/1900 12:00:00 AM -> 1900 6/15/2009 1:45:30 PM -> 2009
"yyyy"	The year as a four-digit number.	1/1/0001 12:00:00 AM -> 0001 1/1/0900 12:00:00 AM -> 0900 1/1/1900 12:00:00 AM -> 1900 6/15/2009 1:45:30 PM -> 2009
"yyyyy"	The year as a five-digit number.	1/1/0001 12:00:00 AM -> 00001 6/15/2009 1:45:30 PM -> 02009
"z"	Hours offset from UTC, with no leading zeros.	6/15/2009 1:45:30 PM -07:00 -> -7
"zz"	Hours offset from UTC, with a leading zero for a single-digit value.	6/15/2009 1:45:30 PM -07:00 -> -07
"zzz"	Hours and minutes offset from UTC.	6/15/2009 1:45:30 PM -07:00 -> -07:00
":"	The time separator.	6/15/2009 1:45:30 PM -> : (en-US) 6/15/2009 1:45:30 PM -> . (it-IT) 6/15/2009 1:45:30 PM -> : (ja-JP)
"/"	The date separator.	6/15/2009 1:45:30 PM -> / (en-US) 6/15/2009 1:45:30 PM -> - (ar-DZ) 6/15/2009 1:45:30 PM -> . (tr-TR)
"string" **'string'**	Literal string delimiter.	6/15/2009 1:45:30 PM ("arr:" h:m t) -> arr: 1:45 P 6/15/2009 1:45:30 PM ('arr:' h:m t) -> arr: 1:45 P
%	Defines the following character as a custom format specifier.	6/15/2009 1:45:30 PM (%h) -> 1
****	The escape character.	6/15/2009 1:45:30 PM (h \h) -> 1 h
Any other character	The character is copied to the result string unchanged.	6/15/2009 1:45:30 AM (arr hh:mm t) -> arr 01:45 A

3.2.2 Number fields

This table provides you with an overview of all possible additional number field customizations.

Format specifier	Name	Description	Examples
"0"	Zero placeholder	Replaces the zero with the corresponding digit if one is present; otherwise, zero	1234.5678 ("00000") -> 01235

		appears in the result string.	0.45678 ("0.00", en-US) -> 0.46 0.45678 ("0.00", fr-FR) -> 0,46
"#"	Digit placeholder	Replaces the "#" symbol with the corresponding digit if one is present; otherwise, no digit appears in the result string. Note that no digit appears in the result string if the corresponding digit in the input string is a non-significant 0. For example, 0003 ("####") -> 3.	1234.5678 ("#####") -> 1235 0.45678 ("#.##", en-US) -> .46 0.45678 ("#.##", fr-FR) -> ,46
"."	Decimal point	Determines the location of the decimal separator in the result string.	0.45678 ("0.00", en-US) -> 0.46 0.45678 ("0.00", fr-FR) -> 0,46
","	Group separator and number scaling	Serves as both a group separator and a number scaling specifier. As a group separator, it inserts a localized group separator character between each group. As a number scaling specifier, it divides a number by 1000 for each comma specified.	Group separator specifier: 2147483647 ("##,#", en-US) -> 2,147,483,647 2147483647 ("##,#", es-ES) -> 2.147.483.647 Scaling specifier: 2147483647 ("#,#,,", en-US) -> 2,147 2147483647 ("#,#,,", es-ES) -> 2.147

3.2.3 Cultures

This table provides you with an overview of all possible culture customizations. These customizations are important if it comes to numbers, dates, or currency formatting.

Culture Name	Language-Country/Region
af	Afrikaans
af-ZA	Afrikaans - South Africa
sq	Albanian
sq-AL	Albanian - Albania
ar	Arabic
ar-DZ	Arabic - Algeria
ar-BH	Arabic - Bahrain
ar-EG	Arabic - Egypt
ar-IQ	Arabic - Iraq
ar-JO	Arabic - Jordan
ar-KW	Arabic - Kuwait
ar-LB	Arabic - Lebanon
ar-LY	Arabic - Libya
ar-MA	Arabic - Morocco
ar-OM	Arabic - Oman
ar-QA	Arabic - Qatar
ar-SA	Arabic - Saudi Arabia
ar-SY	Arabic - Syria
ar-TN	Arabic - Tunisia
ar-AE	Arabic - United Arab Emirates
ar-YE	Arabic - Yemen
hy	Armenian
hy-AM	Armenian - Armenia
az	Azeri
az-AZ-Cyrl	Azeri (Cyrillic) - Azerbaijan
az-AZ-Latn	Azeri (Latin) - Azerbaijan
eu	Basque
eu-ES	Basque - Basque
be	Belarusian

be-BY	Belarusian - Belarus
bg	Bulgarian
bg-BG	Bulgarian - Bulgaria
ca	Catalan
ca-ES	Catalan - Catalan
zh-HK	Chinese - Hong Kong SAR
zh-MO	Chinese - Macau SAR
zh-CN	Chinese - China
zh-CHS	Chinese (Simplified)
zh-SG	Chinese - Singapore
zh-TW	Chinese - Taiwan
zh-CHT	Chinese (Traditional)
hr	Croatian
hr-HR	Croatian - Croatia
cs	Czech
cs-CZ	Czech - Czech Republic
da	Danish
da-DK	Danish - Denmark
div	Dhivehi
div-MV	Dhivehi - Maldives
nl	Dutch
nl-BE	Dutch - Belgium
nl-NL	Dutch - The Netherlands
en	English
en-AU	English - Australia
en-BZ	English - Belize
en-CA	English - Canada
en-CB	English - Caribbean
en-IE	English - Ireland
en-JM	English - Jamaica

en-NZ	English - New Zealand
en-PH	English - Philippines
en-ZA	English - South Africa
en-TT	English - Trinidad and Tobago
en-GB	English - United Kingdom
en-US	English - United States
en-ZW	English - Zimbabwe
et	Estonian
et-EE	Estonian - Estonia
fo	Faroese
fo-FO	Faroese - Faroe Islands
fa	Farsi
fa-IR	Farsi - Iran
fi	Finnish
fi-FI	Finnish - Finland
fr	French
fr-BE	French - Belgium
fr-CA	French - Canada
fr-FR	French - France
fr-LU	French - Luxembourg
fr-MC	French - Monaco
fr-CH	French - Switzerland
gl	Galician
gl-ES	Galician - Galician
ka	Georgian
ka-GE	Georgian - Georgia
de	German
de-AT	German - Austria
de-DE	German - Germany
de-LI	German - Liechtenstein

de-LU	German - Luxembourg
de-CH	German - Switzerland
el	Greek
el-GR	Greek - Greece
gu	Gujarati
gu-IN	Gujarati - India
he	Hebrew
he-IL	Hebrew - Israel
hi	Hindi
hi-IN	Hindi - India
hu	Hungarian
hu-HU	Hungarian - Hungary
is	Icelandic
is-IS	Icelandic - Iceland
id	Indonesian
id-ID	Indonesian - Indonesia
it	Italian
it-IT	Italian - Italy
it-CH	Italian - Switzerland
ja	Japanese
ja-JP	Japanese - Japan
kn	Kannada
kn-IN	Kannada - India
kk	Kazakh
kk-KZ	Kazakh - Kazakhstan
kok	Konkani
kok-IN	Konkani - India
ko	Korean
ko-KR	Korean - Korea
ky	Kyrgyz

ky-KZ	Kyrgyz - Kazakhstan
lv	Latvian
lv-LV	Latvian - Latvia
lt	Lithuanian
lt-LT	Lithuanian - Lithuania
mk	Macedonian
mk-MK	Macedonian - FYROM
ms	Malay
ms-BN	Malay - Brunei
ms-MY	Malay - Malaysia
mr	Marathi
mr-IN	Marathi - India
mn	Mongolian
mn-MN	Mongolian - Mongolia
no	Norwegian
nb-NO	Norwegian (Bokml) - Norway
nn-NO	Norwegian (Nynorsk) - Norway
pl	Polish
pl-PL	Polish - Poland
pt	Portuguese
pt-BR	Portuguese - Brazil
pt-PT	Portuguese - Portugal
pa	Punjabi
pa-IN	Punjabi - India
ro	Romanian
ro-RO	Romanian - Romania
ru	Russian
ru-RU	Russian - Russia
sa	Sanskrit
sa-IN	Sanskrit - India

sr-SP-Cyrl	Serbian (Cyrillic) - Serbia
sr-SP-Latn	Serbian (Latin) - Serbia
sk	Slovak
sk-SK	Slovak - Slovakia
sl	Slovenian
sl-SI	Slovenian - Slovenia
es	Spanish
es-AR	Spanish - Argentina
es-BO	Spanish - Bolivia
es-CL	Spanish - Chile
es-CO	Spanish - Colombia
es-CR	Spanish - Costa Rica
es-DO	Spanish - Dominican Republic
es-EC	Spanish - Ecuador
es-SV	Spanish - El Salvador
es-GT	Spanish - Guatemala
es-HN	Spanish - Honduras
es-MX	Spanish - Mexico
es-NI	Spanish - Nicaragua
es-PA	Spanish - Panama
es-PY	Spanish - Paraguay
es-PE	Spanish - Peru
es-PR	Spanish - Puerto Rico
es-ES	Spanish - Spain
es-UY	Spanish - Uruguay
es-VE	Spanish - Venezuela
sw	Swahili
sw-KE	Swahili - Kenya
sv	Swedish
sv-FI	Swedish - Finland

sv-SE	Swedish - Sweden
syr	Syriac
syr-SY	Syriac - Syria
ta	Tamil
ta-IN	Tamil - India
tt	Tatar
tt-RU	Tatar - Russia
te	Telugu
te-IN	Telugu - India
th	Thai
th-TH	Thai - Thailand
tr	Turkish
tr-TR	Turkish - Turkey
uk	Ukrainian
uk-UA	Ukrainian - Ukraine
ur	Urdu
ur-PK	Urdu - Pakistan
uz	Uzbek
uz-UZ-Cyrl	Uzbek (Cyrillic) - Uzbekistan
uz-UZ-Latn	Uzbek (Latin) - Uzbekistan
vi	Vietnamese
vi-VN	Vietnamese - Vietnam

4. Available demo templates

DocumentsCorePack already has a set of templates to allow you to quickly start using the configuration.

Name	Function/Usage	Minimum Data Input
Account reconnect	Simple account template just with fields from account entity.	The sample data.
Account overview	Simple account template with tables which contain data from the given entities.	The sample data and data from each additional entity.
Contemporary letter		
List of accounts related to this account	Shows all accounts related to the selected account.	The selected account should contain other related accounts.
List of contacts related to this account	Shows all contacts related to the selected account.	The selected account should contain other related contacts.
Account QR Code	How to use the QR-Code-Field with the Account entity.	The sample data.
Activity Overview	Simple activity template with tables which contain data from the given extra entities.	The sample data and data from each additional entity.
Contact Reconnect – Gift Certificate	Simple Activity Template just with fields from the Activity entity.	The sample data.
List of Accounts related to this contact.	Shows all accounts from the selected contact.	The selected contact should contain other related contacts.
Quote Base	Simple Quote Template just with fields from the quote entity.	You should have at least one quote.
Quote with Grouping Base	Simple Quote Template.	You should have at least one quote, some products, and some prices.
Quote QR Template	How to use the QR-Code-Field with the Quote entity.	You should have at least one quote, some products, and some prices.
Invoice Base	Simple invoice template just with fields from the invoice entity.	The sample data.
Invoice with grouping base	Simple invoice template.	The sample data.

Newsletter to all accounts of this marketing list	Generates a document for each account in a marketing list.	You should have a marketing list with at least one account.
Opportunity Base	A simple sample template for an opportunity letter.	The sample data.

Figure 47: List of Demo templates

5. Template Management in DocumentsCorePack

This section we will cover a variety of topics related to managing templates, including how templates are saved, how security roles affect templates, template versioning, and importing/exporting templates from other environments.

5.1. Where are Templates saved?

Whenever a new template is created and saved, the template is saved as an attachment to an **MSCRM-ADDONS.com DocumentsCorePack Template** record in Dynamics 365. The record's name will match that of the template. The template itself can be found under the **Notes** tab.

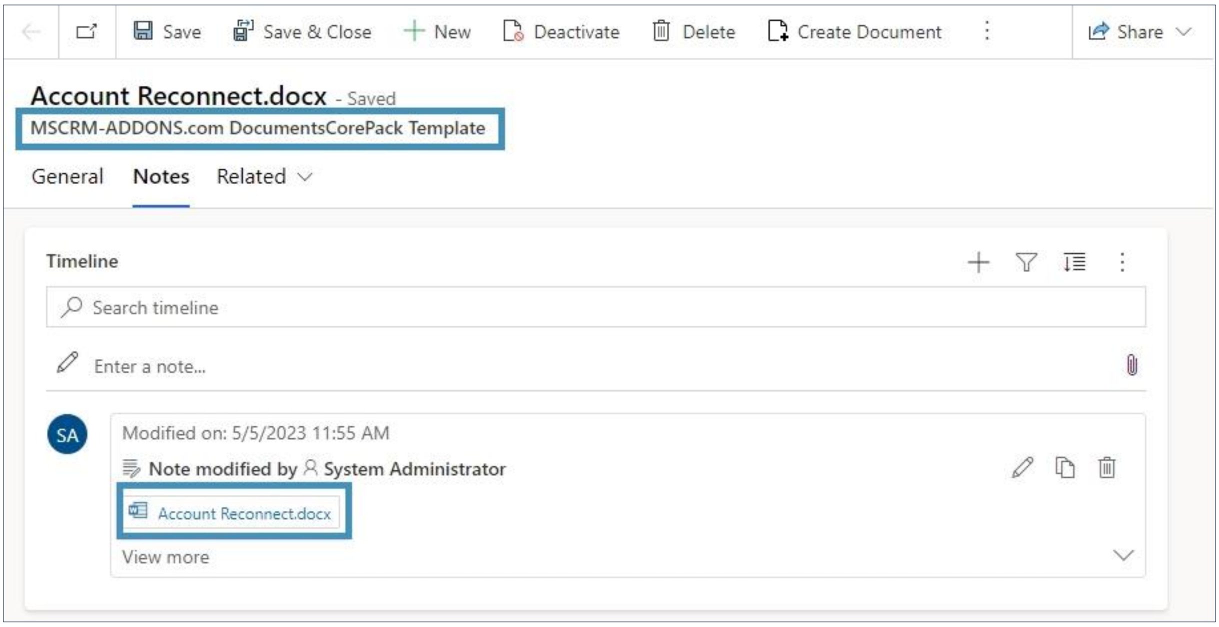


Figure 48: Example record with a template stored as a note

Template Groups: Templates can be stored in different groups (e.g., sales templates, customer service templates, etc.). Groups are defined when saving templates via the Template Designer in Microsoft Word. By doing so, templates are stored in a structured manner which eases access for end users via the DocumentsCorePack dialog.

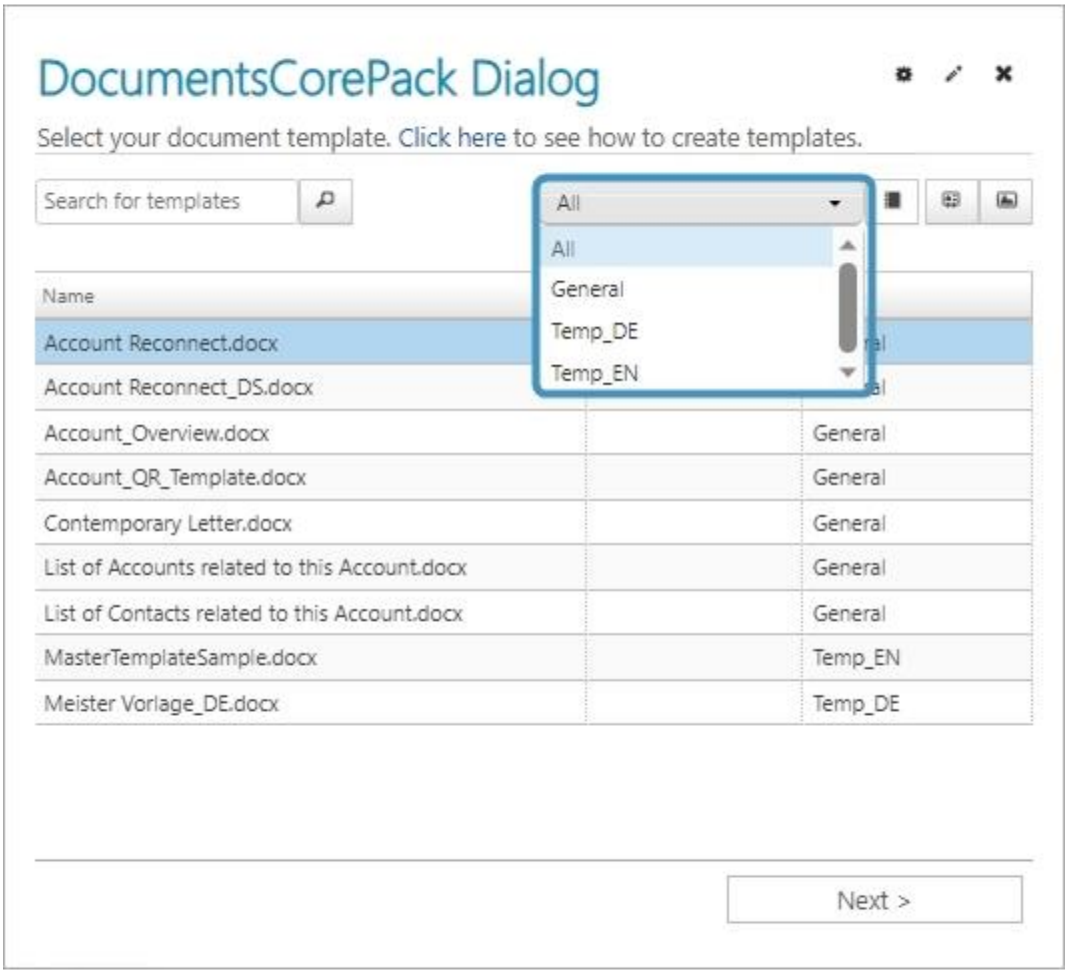


Figure 49: Added Groups – Different Languages

5.2. How to delete templates

You have the option to delete templates via the DocumentsCorePack Template designer using the delete option in the Open/Save dialog located in the upper right corner.

Please note: The records of the **mscrm-addons.com** templates entity will be deactivated and therefore no longer usable.

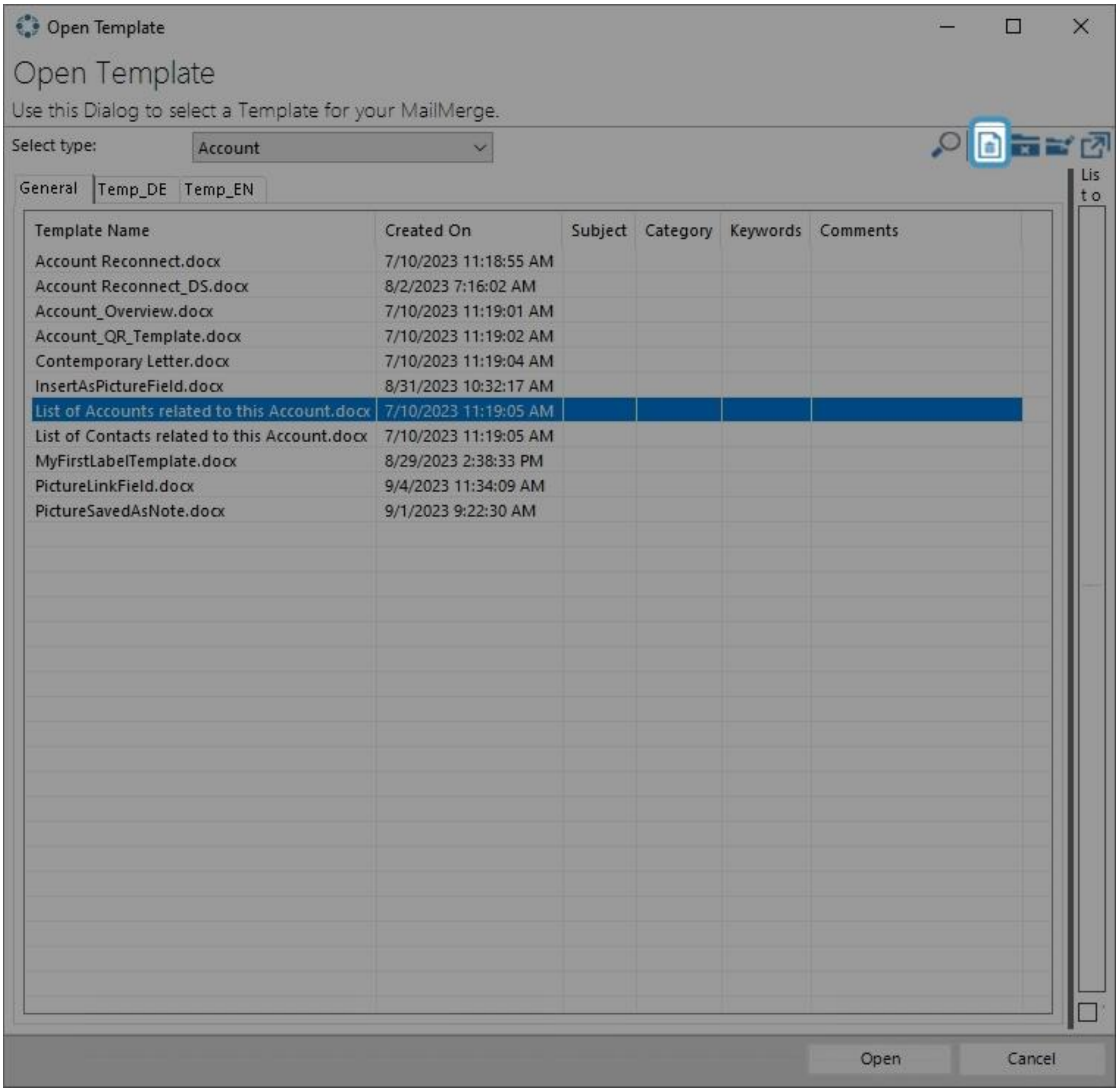


Figure 50: Delete templates via the Template Designer

Info: To Hard-delete templates you will have to delete the corresponding records in the mscrm-addons.com DocumentsCorepack Templates table in your Dynamics 365/Dataverse.

5.3. Security

Security roles play a vital part in allowing users access to templates. Since templates are stored as records of a custom table (see above), the Dynamics 365 security model applies. When installed, a custom security role is distributed to all users, providing anyone within the Dynamics 365 environment access to DocumentsCorePack templates. Template access can also be handled via a separate security role as long as the proper permissions are granted to users that need to generate documents.
This information is covered in more detail [here](#).

5.4. Template Versioning

Template versioning allows users to view older versions of their templates. Once enabled, backups of saved templates will be recorded and available to be recovered. This can be very helpful in situations where your template gets corrupted during the design process, or if an older version of a template is needed due to important information being absent in a newer version.
More information on this feature can be found here.

5.5. Customizing Columns in the Dialog

The **Open** and **Save** dialogs for the Server and Client can be customized to display other columns outside of the default columns. The default columns can also be hidden in this way. This can be useful in situations where a different column setup for your dialog would give more relevant information to those saving and opening templates. It can also give users more pertinent information when creating documents through DocumentsCorePack Server.

An article on this feature can be found here.

5.6. Importing, Exporting, and Transferring Templates

Templates can be imported, exported, or transferred using the DocumentsCorePack Online Service Configuration. This tool can allow users to:

- import template files from their local machine,
- export their templates into a .zip file as a local backup with dedicated timestamps, and
- transfer templates to a separate organization. In particular, transferring templates can be helpful in situations where templates should be designed in one environment before being sent to another.

Details on this feature are available here.

6. Tutorials (How To´s)

Please find below a comprehensive list of all the available How-To guides and tutorials that will help you start with the DocumentsCorePack Template Designer.

6.1. How to create DocumentsCorePack templates

This chapter contains a step-by-step description of how to create a DocumentsCorePack template. We decided to create a so-called **quote-with-grouping template** because it is most frequently used by Microsoft Dynamics 365 users (**Quote-with-grouping** means that the quote products are grouped by the value of a specific Dynamics 365 attribute, such as **subject**.).

Step 1: First, we need to create the basic layout of the template. Clicking on the **Insert MailMerge Fields** menu button in the www.mscrm-addons.com command bar will open the DocumentsCorePack Template Designer.

To create the basic layout for, as an example, a quote-with-grouping-template, we must select the type **Quote** in the **Type-Selector** dropdown menu. Each template is based on a specific entity.

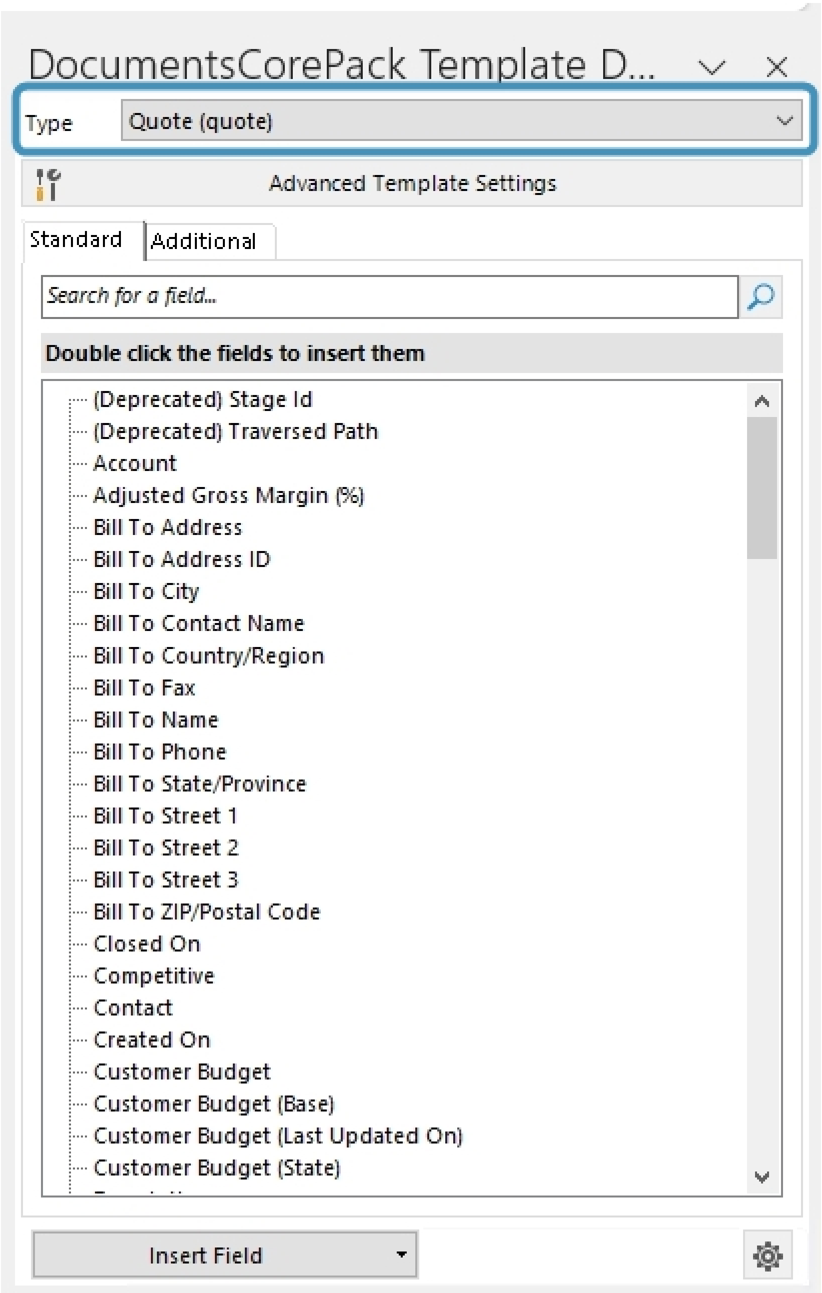


Figure 51: Template Designer - Selected Entity

Step 2: Now that we have selected an entity, we need to insert fields into our template. To do so, we must set the cursor at the position where we would like to insert a certain entity. Then, we double-click the field. You could insert a field via the **Insert field** button as well.

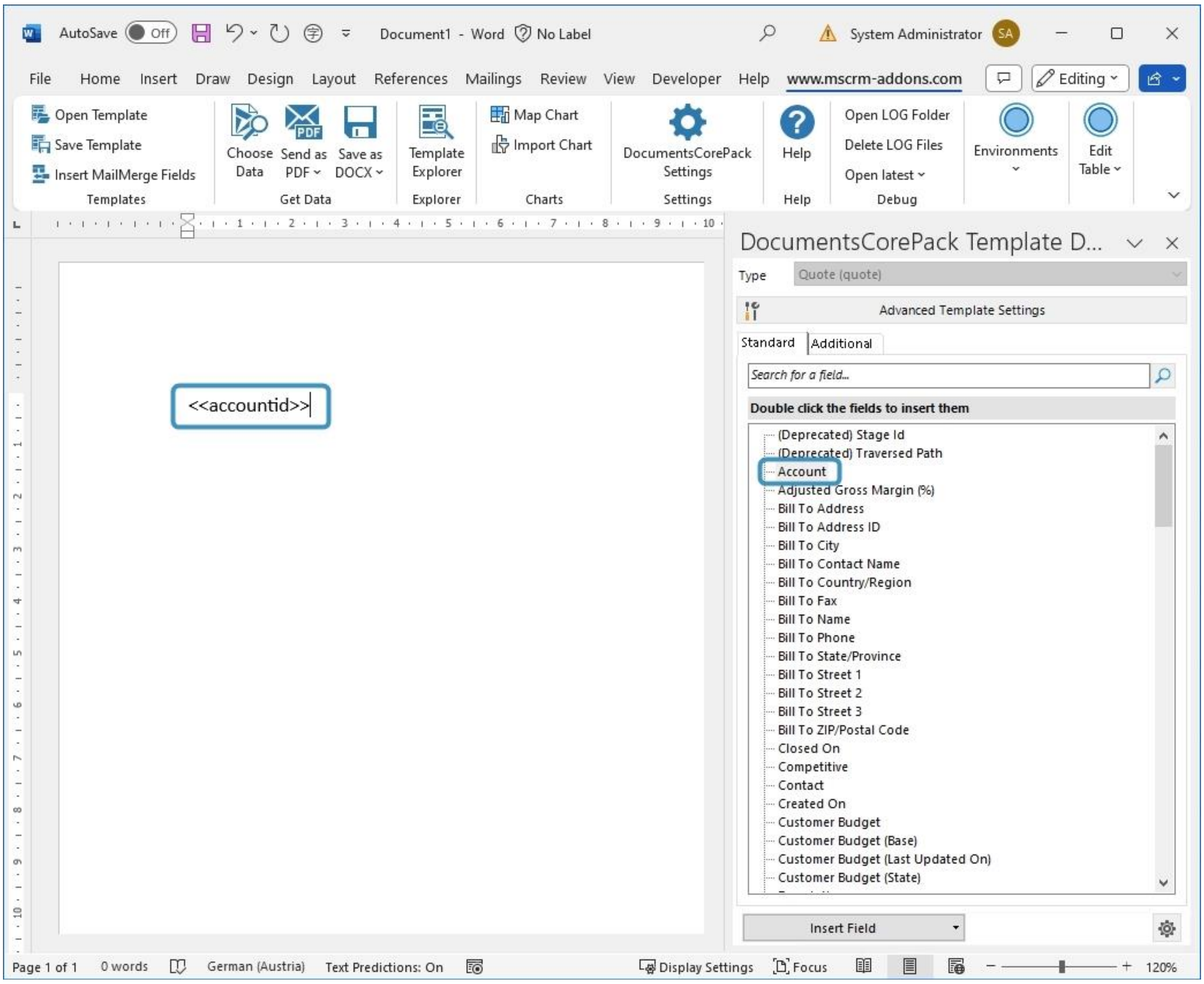


Figure 52: Template Designer - Insert Fields

Step 3: The next step is to resolve the quote-quote product relationship. To do so, we need to click on the **Additional** tab in the DocumentsCorePack Template Designer. The **Additional** section allows us to resolve any relation/entity within Dynamics 365 and brings up a list of all attributes from the related entities so that they can be used within the document.

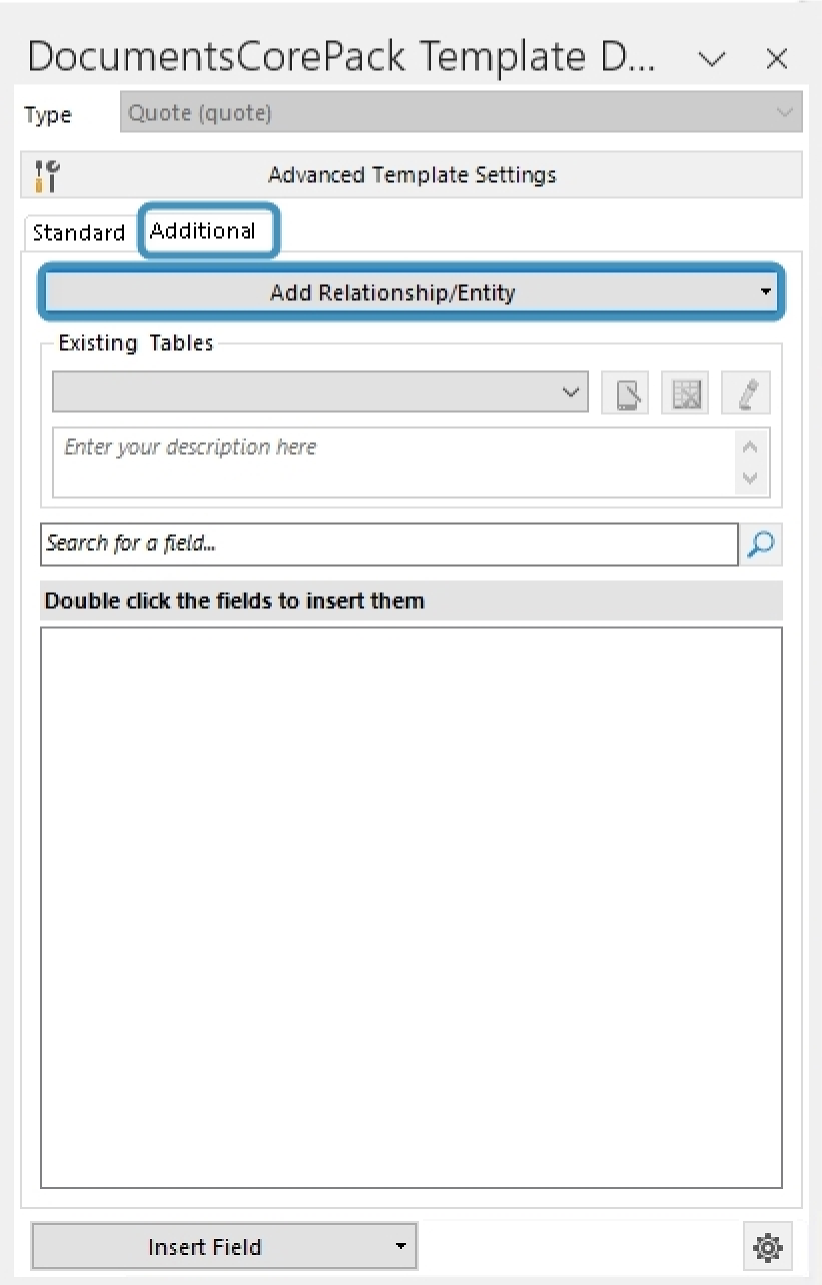


Figure 53: Add Relationship in Additional tab

We use the Configure fields and data source dialog to resolve the fields, tables and relationships we need for our document. In our example, we must select **Quote -> Quote Booking Product [msdyn_quote]**. As a result, the available fields of this relationship are displayed in the **Attributes** section of the **Configure fields and data source dialog**.

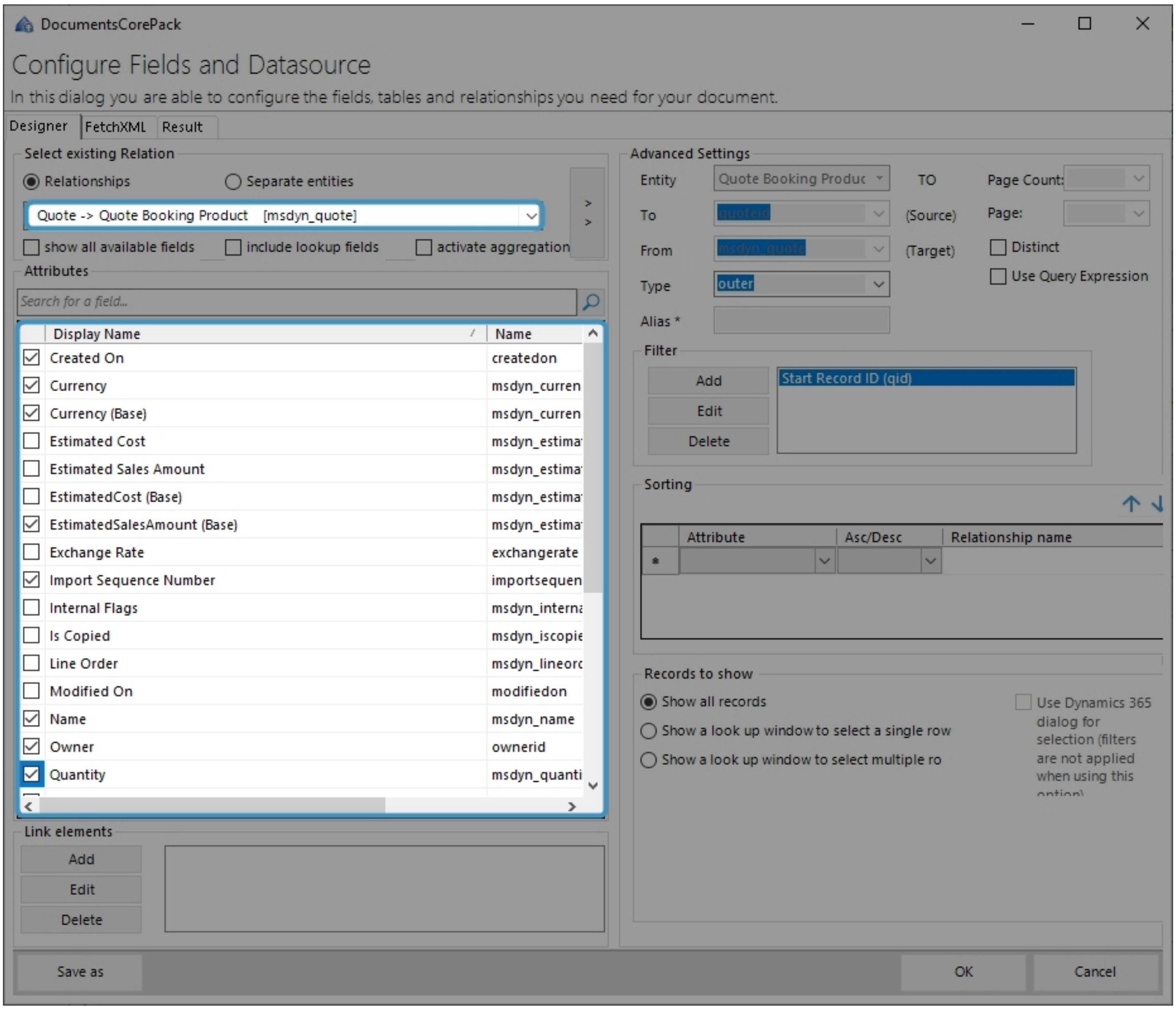


Figure 54: Configure fields and data source dialog

As soon as we click the **OK** button, all of the selected fields will be made available for insertion into the template.

Please note: Only the fields checked in the Attributes field will later be visible in the DocumentsCorePack Template Designer.

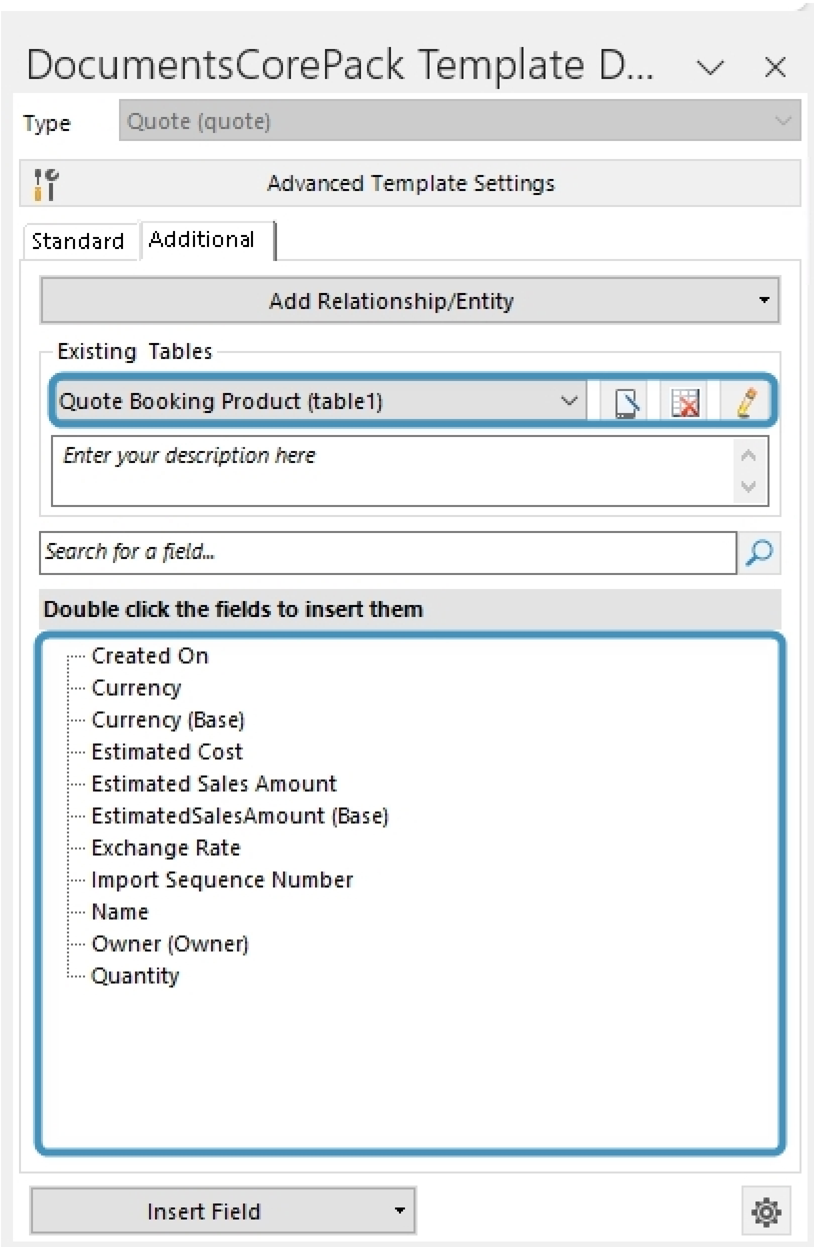


Figure 55: Additional tab/fields related to Quote Product (table 1)

Step 4: **Insert a table**. The process of inserting a table of items is completely automated. You simply need to set the cursor to where you want to add the table, and then double-click on one of the fields that you have previously added to the table. A dialog will then appear.

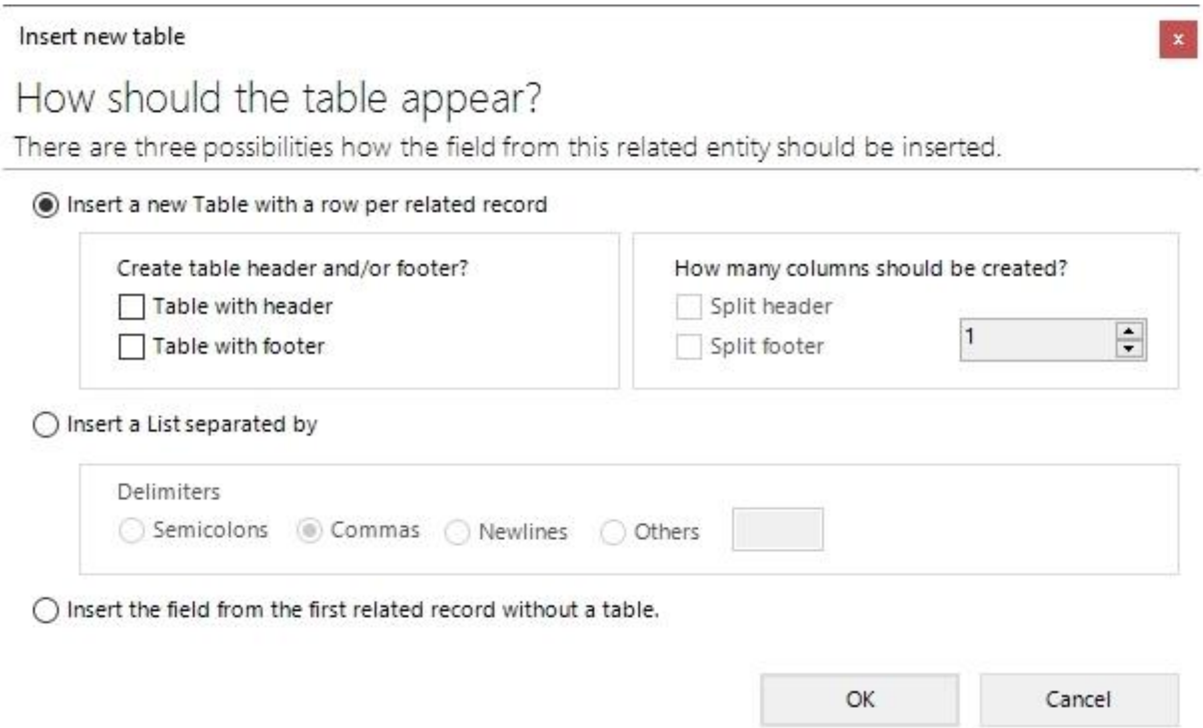


Figure 56: Insert table-dialog

Within this dialog, you can select from three options for how the fields should be inserted into the table.

Figure 57: Insert Table

In our example, we want to insert a new table with a header and a footer. So, we select the corresponding options and click on the **OK** button. As a result, the table will be inserted at the determined position.

Step 5: **Format the table**. Once we have inserted the table, we can add fields like quantity, product name, or even a table header including column names with the formatting options available in the **www.mscrm-addons.com** tab.

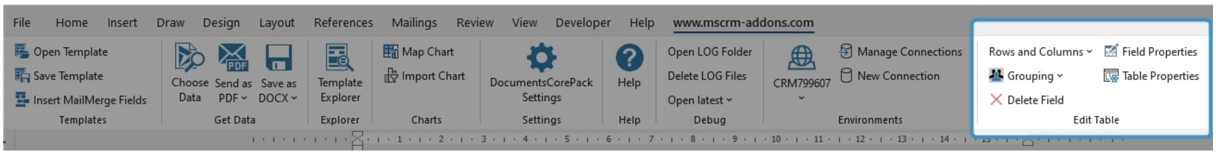


Figure 58: www.mscrm-addons.com tab (Rows and Columns)

With a click on the **Rows and Columns** dropdown, you have the options to split or merge the columns, insert a right or left column, delete a row or a table, and add a header or a footer row.

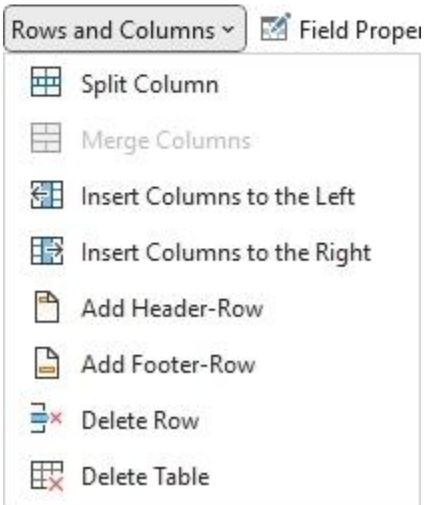
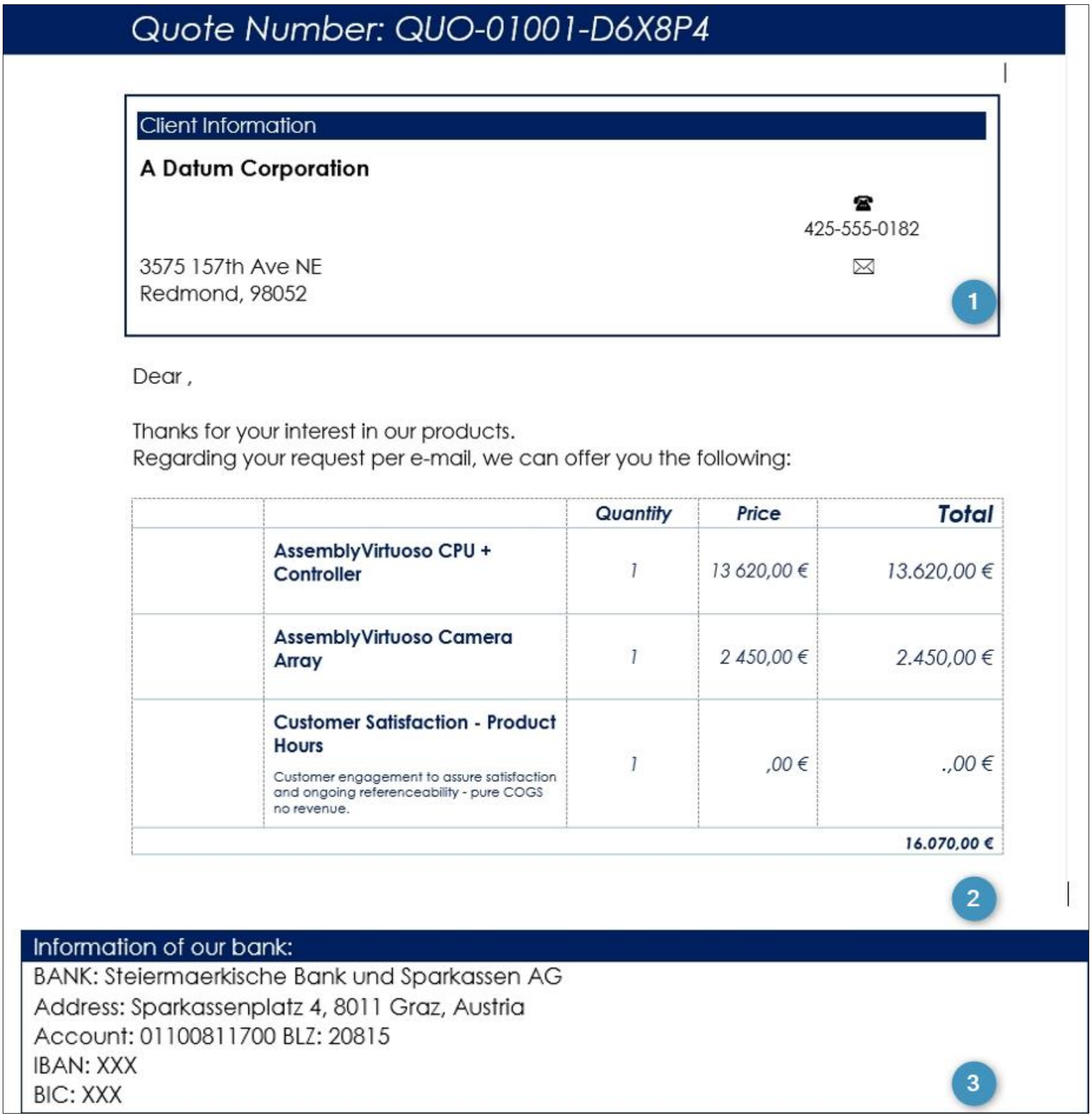


Figure 59: Column customization

Please note: It is very important to insert the header, as well as the footer, exclusively via the **www.mscrm-addons.com** tab in the command bar. Do not enter them via Microsoft Word!

Step 6: **Get the result**. Make sure to save your template with the **Save Template** button in the **www.mscrm-addons.com** tab in the Word ribbon. Do not simply save the template as a file to your computer. After saving the generated document, test your template by selecting **Choose Data** and then selecting data to test.

In the example below, we can see the result with the replaced fields at the 1 top, the 2 line-item table, and the 3 bank-details at the bottom.



Quote Number: QUO-01001-D6X8P4

Client Information

A Datum Corporation

425-555-0182

3575 157th Ave NE
Redmond, 98052

1

Dear ,

Thanks for your interest in our products.
Regarding your request per e-mail, we can offer you the following:

		Quantity	Price	Total
	AssemblyVirtuoso CPU + Controller	1	13 620,00 €	13.620,00 €
	AssemblyVirtuoso Camera Array	1	2 450,00 €	2.450,00 €
	Customer Satisfaction - Product Hours Customer engagement to assure satisfaction and ongoing referenceability - pure COGS no revenue.	1	,00 €	.,00 €
				16.070,00 €

2

Information of our bank:
BANK: Steiermaerkische Bank und Sparkassen AG
Address: Sparkassenplatz 4, 8011 Graz, Austria
Account: 01100811700 BLZ: 20815
IBAN: XXX
BIC: XXX

3

Figure 60: DocumentsCorePack Template - Result

6.2. How to create a Master Template

The **Master Template** feature allows you to manage the design of a document's header and footer in a separate template.

When the design changes of the **Master Template**, you can modify one template instead of all templates. In your template, you just have to set the **Master Template,** which should be applied when the document is merged.

This feature requires at least version 9.27 of the DocumentsCorePack Template Designer and version 2017.193 of DocumentsCorePack.

Example: The left example shows the Master Template, which is used to edit the document on the right side, which contains the company's design in the header and footer.

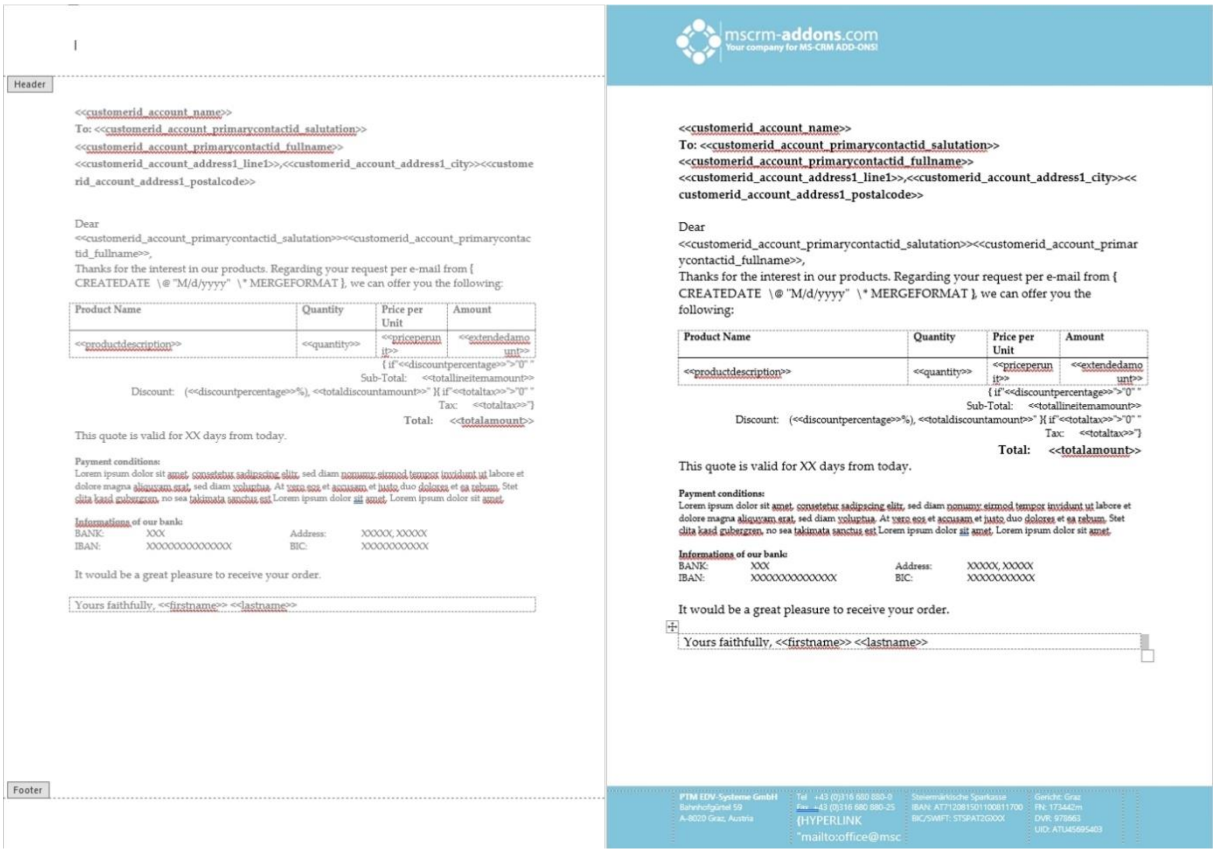


Figure 61: Example

5.2.1 How to set up a Master Template

The **Master Template** feature allows you to manage the design of the document's header and footer in a separate template. So, when the design changes you have to modify one template instead of each template. In your actual templates, you have to set the **Master Template** which should be applied when the document is merged.

Step 1: Open a document and edit the Header and the Footer according to the company´s design.

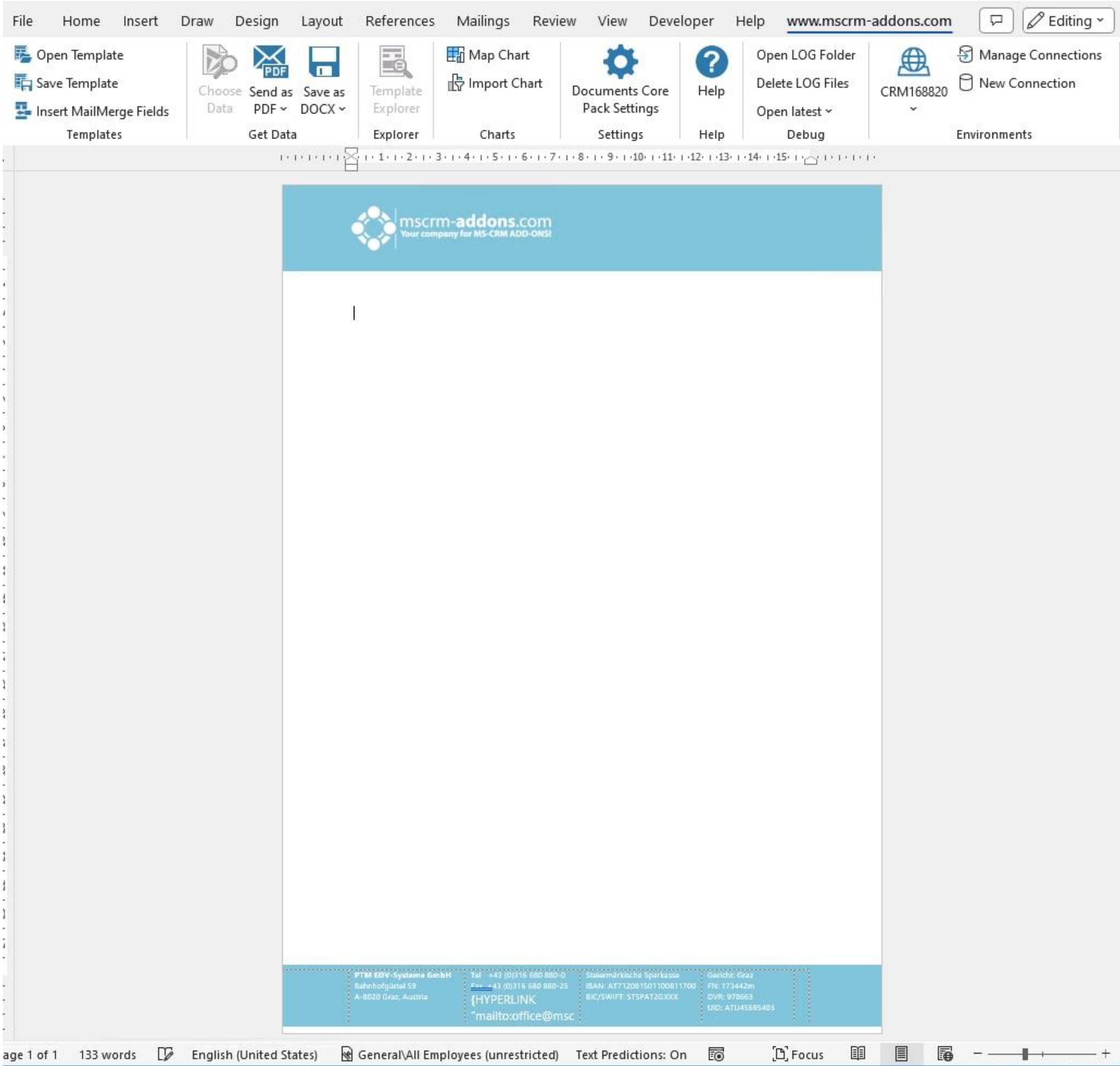


Figure 62: Header and Footer edited

Step 2: Save the document by using the ① Save Template option as a static template in your Dynamics 365.

When the **Documents Core Pack Question** occurs, please confirm with **Yes**.

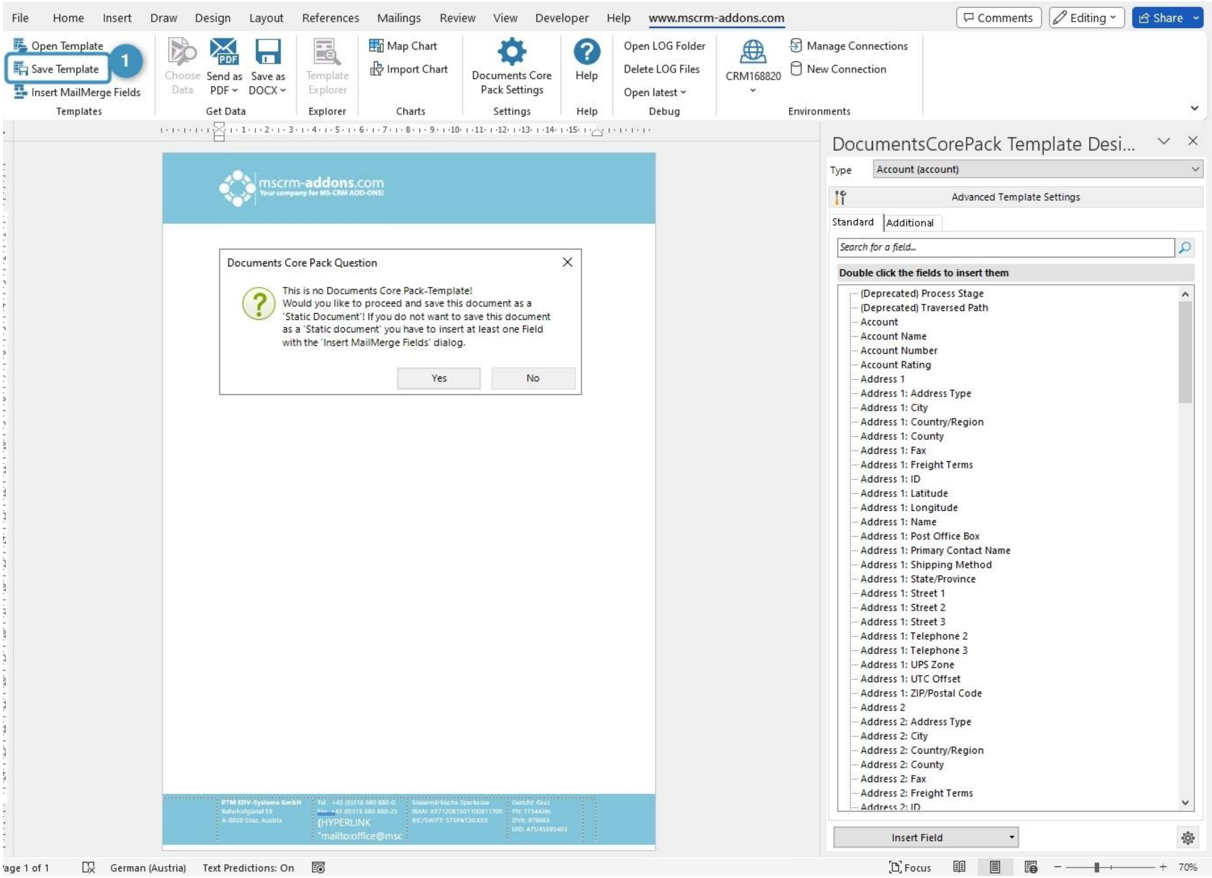


Figure 63: Save template option

Step 3: Assign the Master Template to your regular templates. Open the ① **Advanced Template Settings** and go to the ② **General tab** and navigate to the ③ **Master Template** settings.

Two settings: ④ To define which Master Template should be applied for all **Headers** and **Footers** in the document. ⑤ It is an optional setting for a Master Template for the **Footer**.

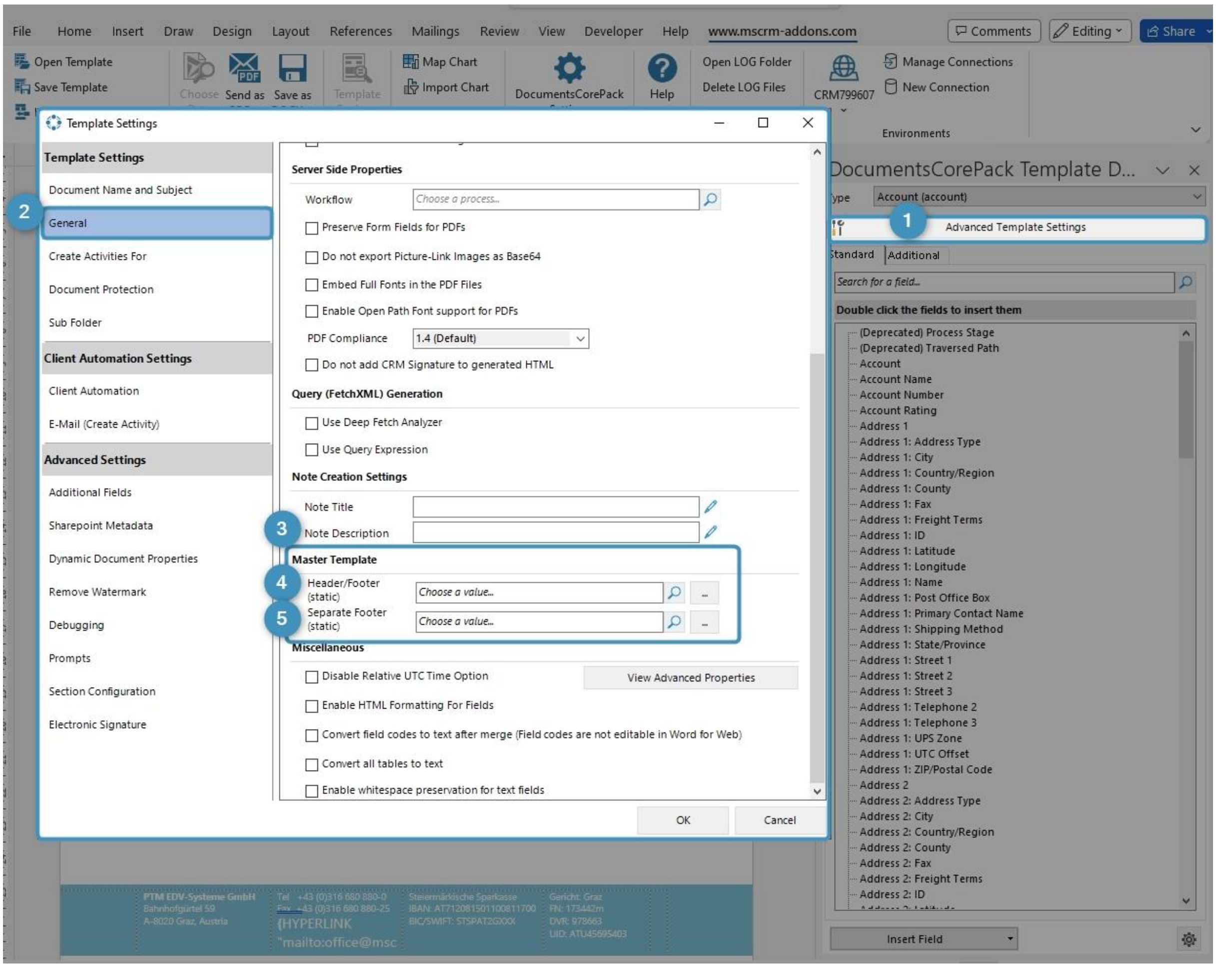


Figure 64: Open Advanced Template Settings, General tab, Master template settings

Step 4: To assign a **Master Template** type in the ① **Header/Footer (static)** search bar the name of the **Master Template** you prepared, or you can open it with the ② **Look Up Record** by clicking on the magnifier glass.

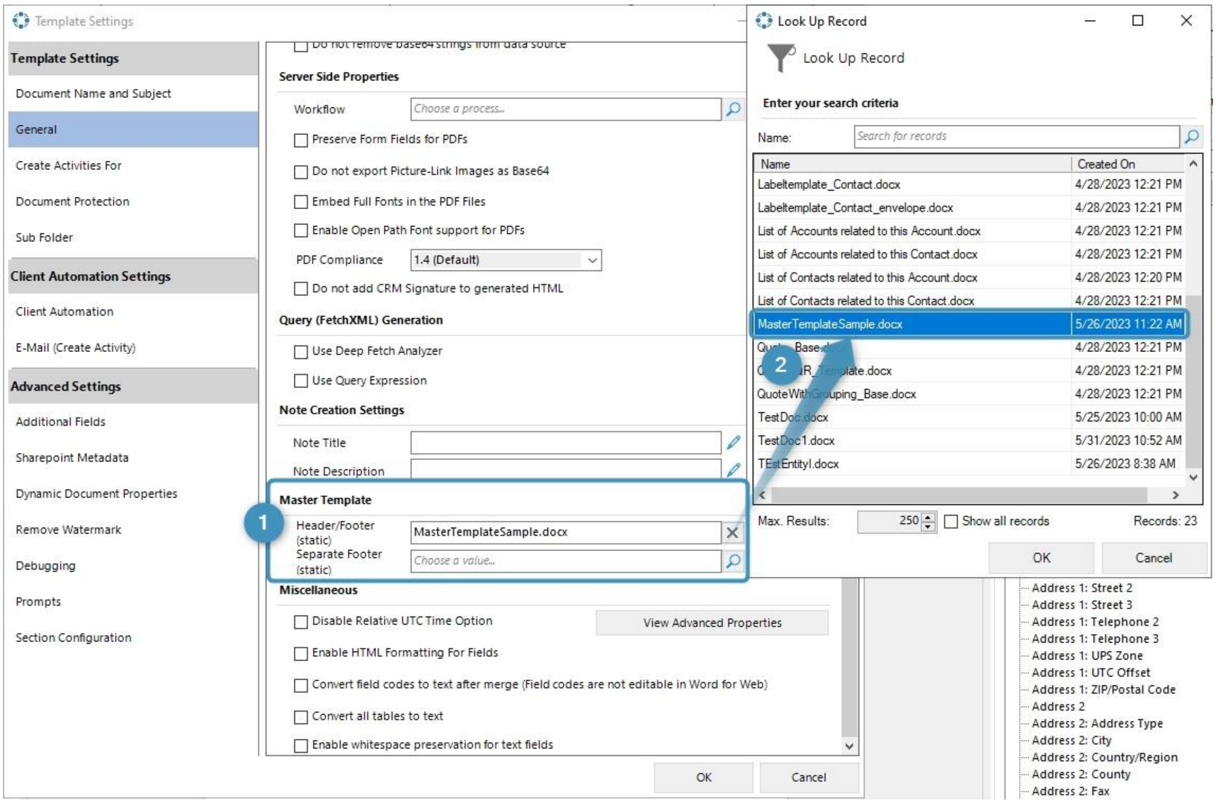


Figure 65: Assign a Master Template type in the Header/Footer (static) section

Step 5: Save the Master Template. Before use or test the defined **Master Template** it is necessary to save it:

- Locally with the standard **Save**.
- **Save as** functionality of Microsoft Word.
- **Save Template** option of the DocumentsCorePack Template Designer to publish the template to Dynamics 365.

Step 6: Test your template (optional). Find out if your changes on the template are working. A step-by-step description of how to test your template can be found here.

Please note:

- If you want to use "**Different First Page**" or "**Different Odd & Even Pages",** then you have to design also the second page in the Master Template otherwise those sections will be blank in the result document.
- The size of the **Header/Footer** in the Master Template shouldn`t be bigger than the page margin of the main template. Otherwise, it will shrink the document body size in the output document. There is no setting to limit the size of the header/footer.
- Format styles of the Master Template are not merged into the main template. Text formatting made in the Master Template without format styles will be displayed correctly. If you like to work with format styles in the Master Template, please make sure that they exist in each template.

6.3. How to test your template

This article describes how to test a DocumentsCorePack (DCP) template after you have created or modified a new template. You can test your template directly within Microsoft Word.

Open the DocumentsCorePack template you want to test in Word and click on “mscrm-addons.com”. Navigate to the “Choose Data” button.

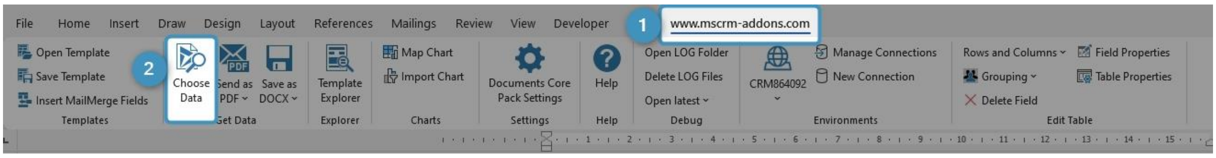


Figure 66: Word ribbon – DocumentsCorePack Template Designer

A search dialog opens. You can choose between steps 1 and 2 and then must complete steps 3 and 4.

1 You can search for a specific term by entering its name.
2 You can press the “Search” button and all records matching your entity will appear.
3 Mark the record you want to test your template with.
4 Press the “Select” button to generate a document based on the selected record.

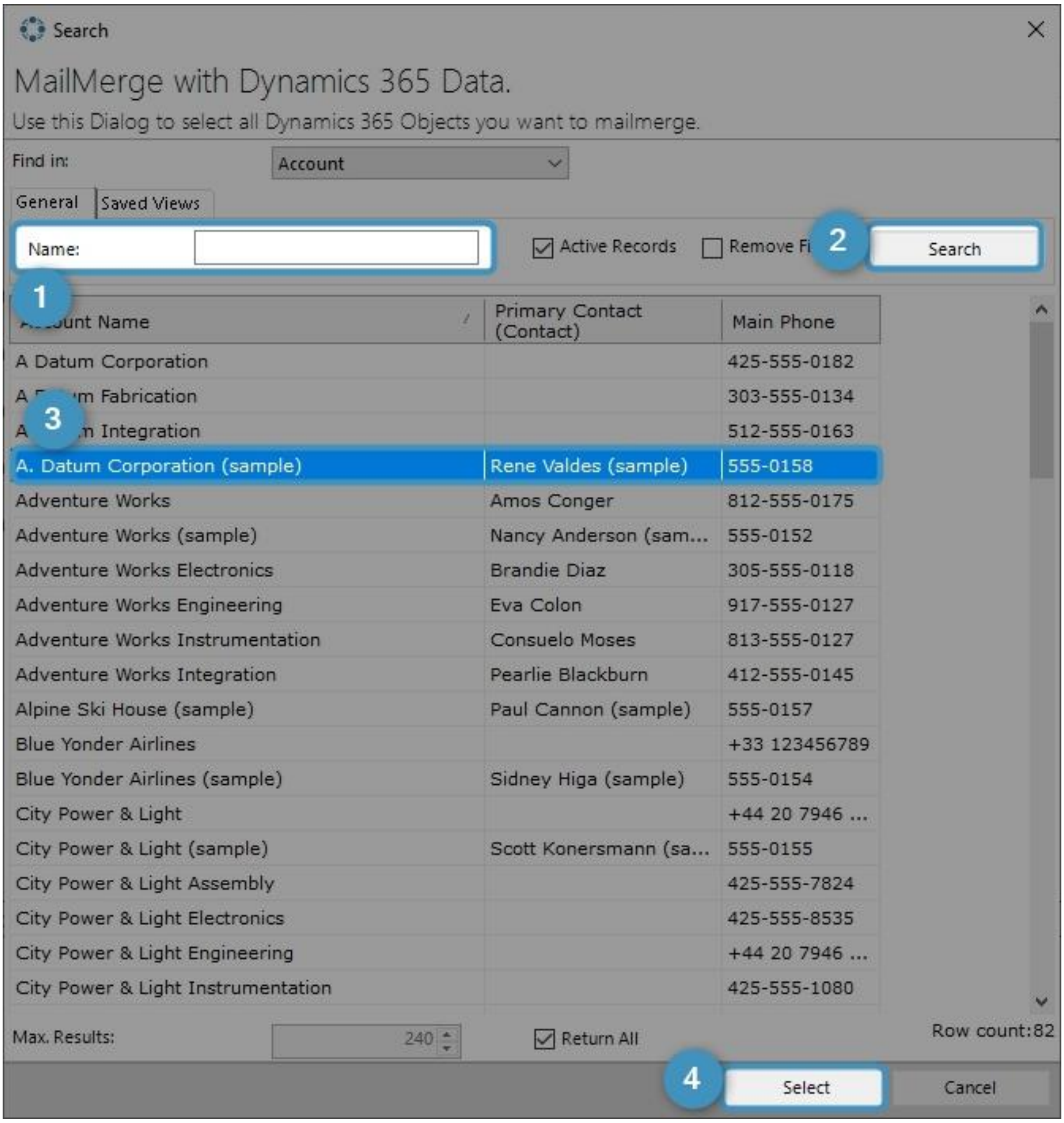


Figure 67: Dynamics 365 record to test your template with

The final generated document will show after a few seconds.

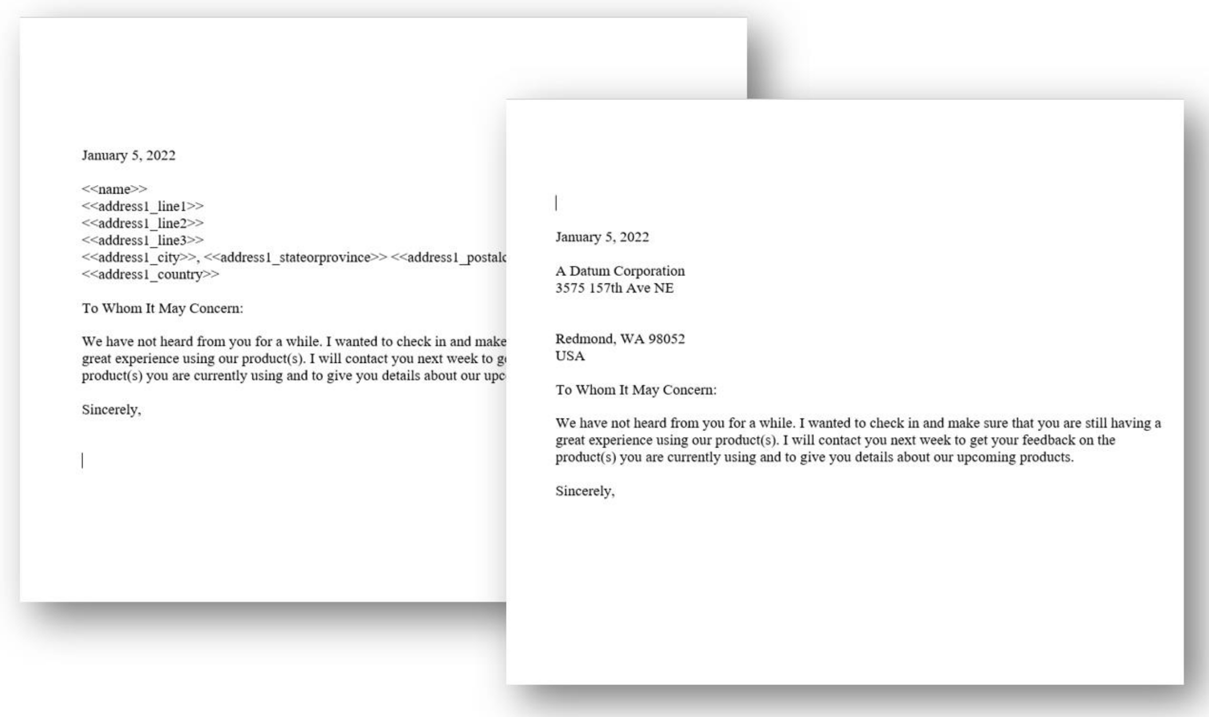


Figure 68: Left: Template – Right: Data mapped from the selected Dynamics 365 record

6.4. How to pre-filter result rows before generating a document

This functionality is helpful when the user needs to select a specific related entity (for example, **contact**) before starting to generate the document.

To do so, you must open the 1 **Additional** tab, select a relationship, and click the 2 **Edit** button.

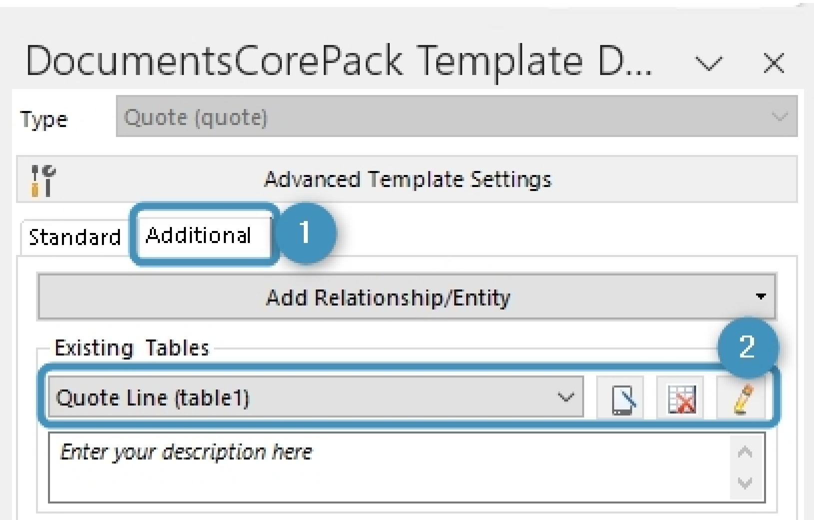


Figure 69: Open relationship/table

In the **Configure Fields and Datasource** dialog go to the **Records to Show** section.

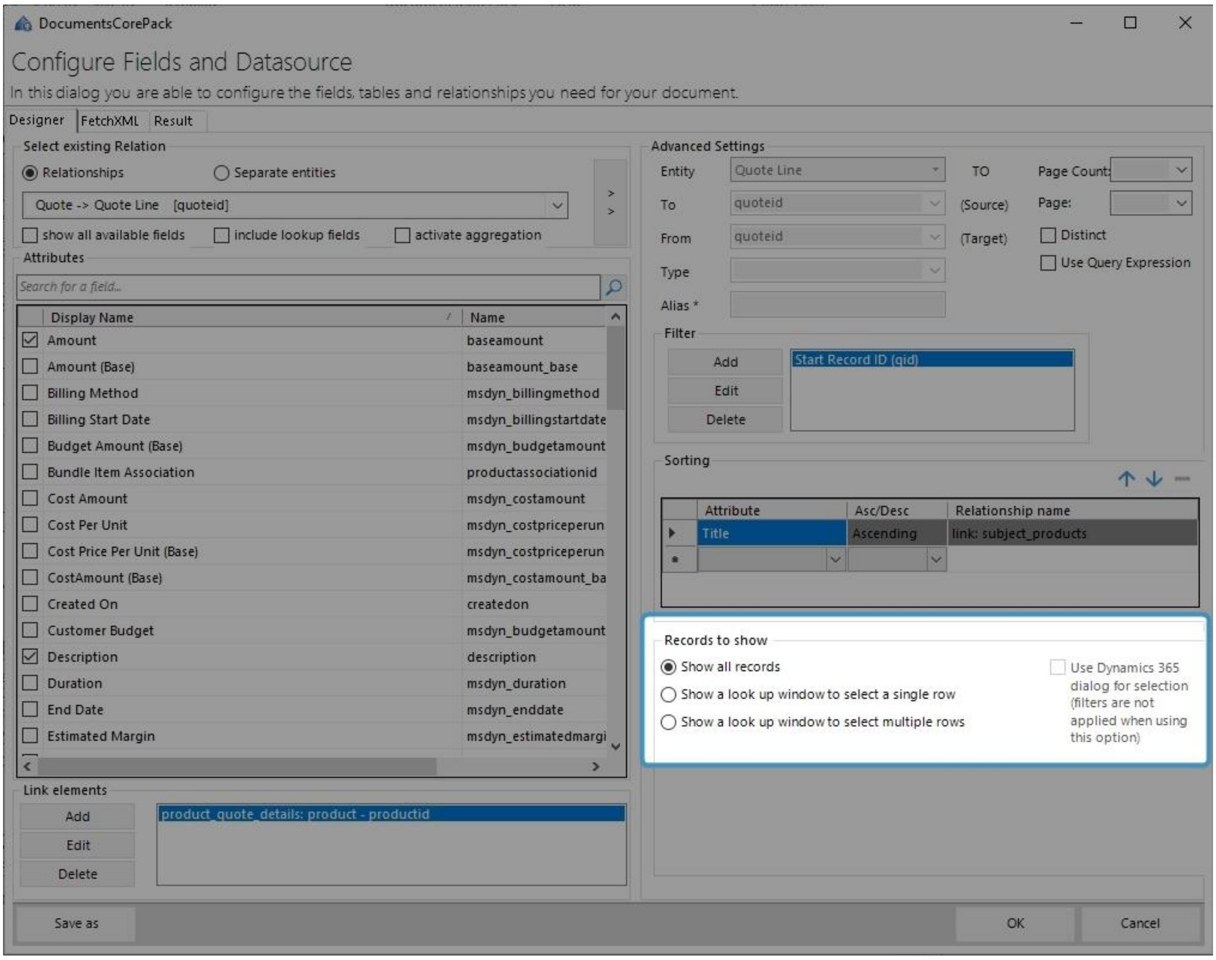


Figure 70: Configure fields and datasource-dialog – Records to show (default settings)

In the **Records to show** section, you can choose if you want a selection and if so, which type. You can choose between single or multiple rows. The **Width(px)** section enables you to determine the order and the width of the columns in pixel within the lookup window.

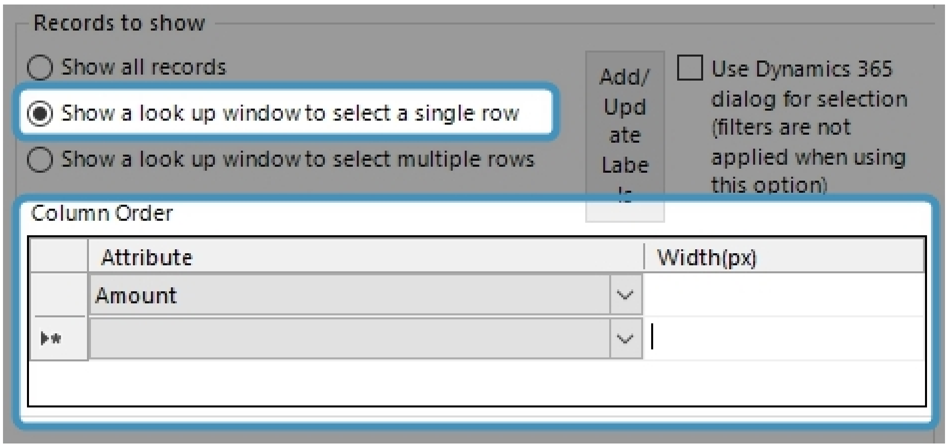


Figure 71: Records to show – Show a look up window to select a single row

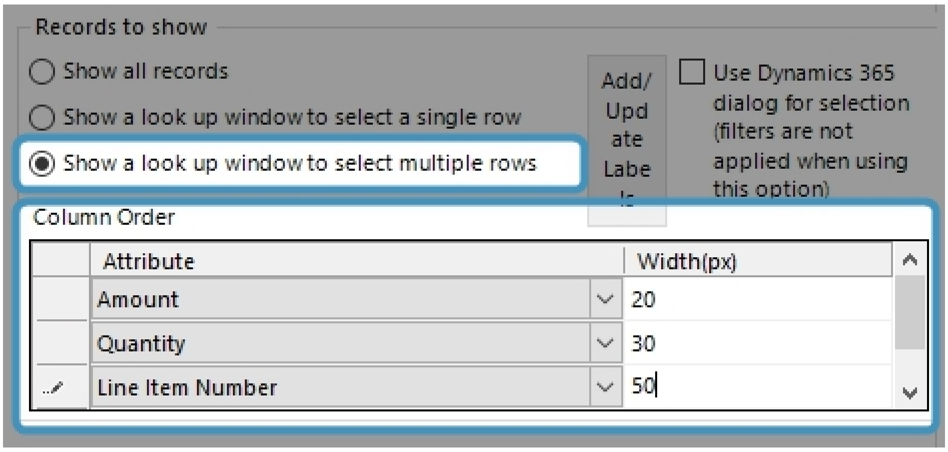


Figure 72: Records to show – Show a look up window to select multiple rows incl. width (px)-settings

6.5. How to create label templates

This article explains how to create label templates with DocumentsCorePack TemplateDesigner.

A. **Select various records at once** – each label equals one record from the main entity of the template. (For example, if you want to merge an account label template for a few companies, you can select different companies at once. As a result, you get one label per selected account.)
B. **Select one record and set relations** – each label equals one record from the predefined relationship. (For example, if you want to merge an Account Label Template for one company, but different employees, you can select one company to receive all related contacts. As a result, you get one label per related contact.)

6.5.1 Option A – Select various records at once

Please note: In general, all Microsoft Word formatting options are supported. However, the label template must be created in advance and saved as .docx.

Step 1: To begin creating your label template, open MS Word and navigate to the **www.mscrm-addons.com** tab and click on the **Insert MailMerge Fields** button.

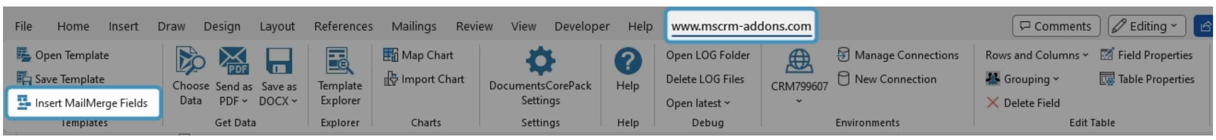


Figure 73: Word ribbon www.mscrm-addons tab

Step 2: The DocumentsCorePack TemplateDesigner opens. Press the 1 **Advanced Template Settings**. The **Template Settings** opens.

Select the 2 **General** tab. In the **General Settings** overview, check off 3 **Mark as Label Template**. If you press the 4 **edit** button, the **Label Template Sorting dialog** opens. Here you can set up a sorting for your labels if required, such as for names or postal codes. To confirm, press the 5 **OK** button.

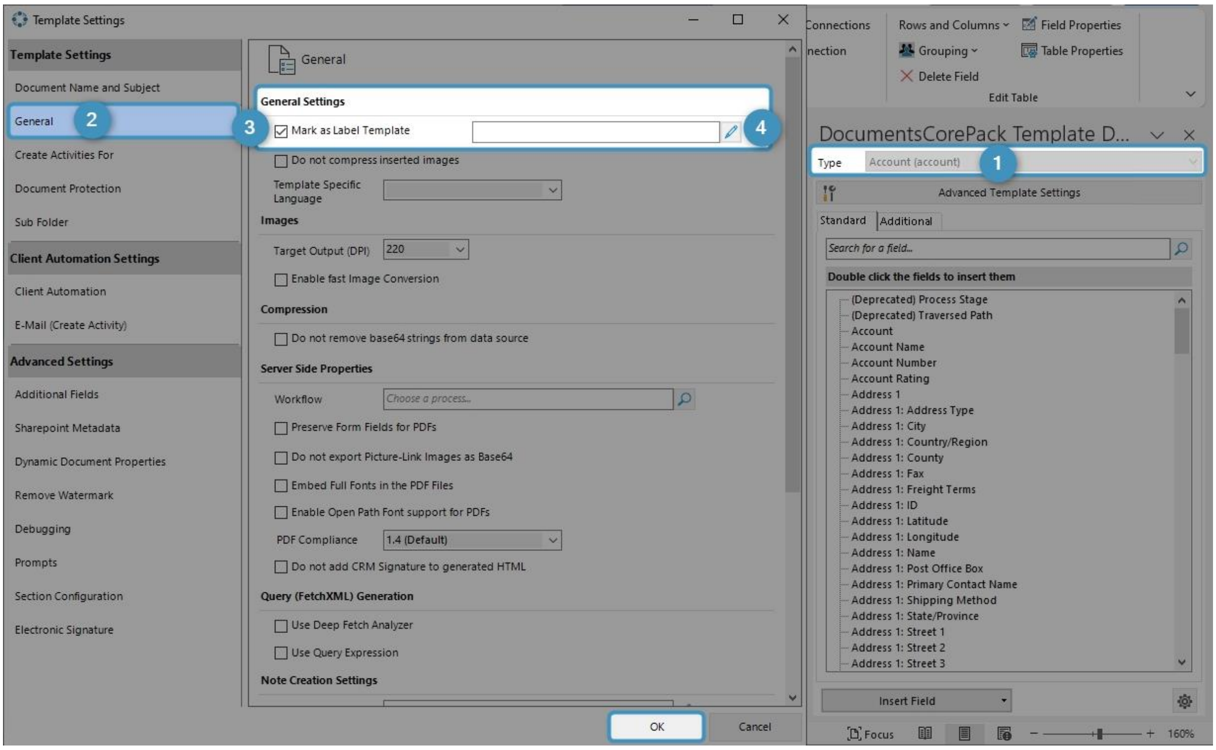


Figure 74: Template Designer settings

In this optional Label Template settings, you can specify several sorting criteria. In this example, the labels are sorted by name in descending order.

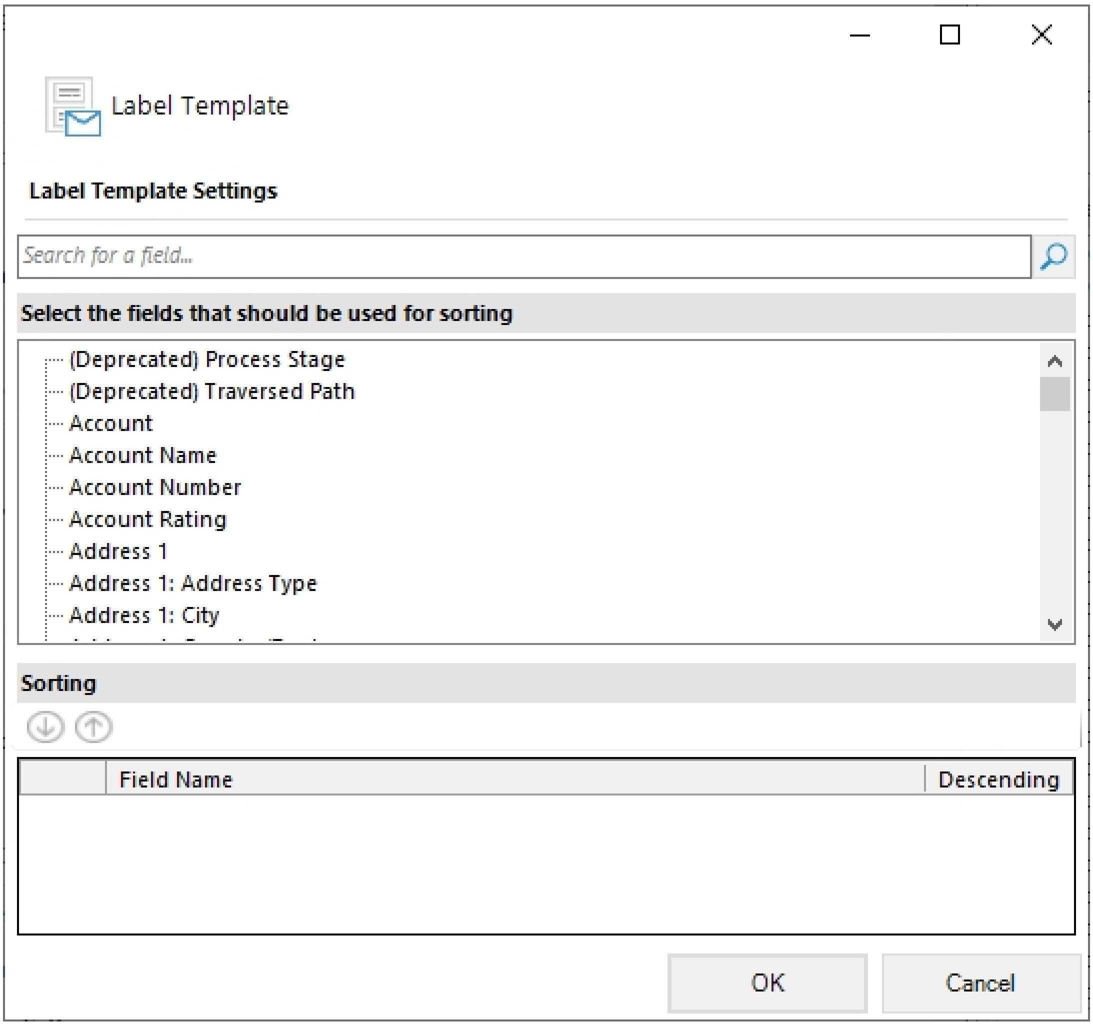


Figure 75: Optional edit-function

After you have checked **Mark as Label Template**, these 3 options are added in the MS Word ribbon.

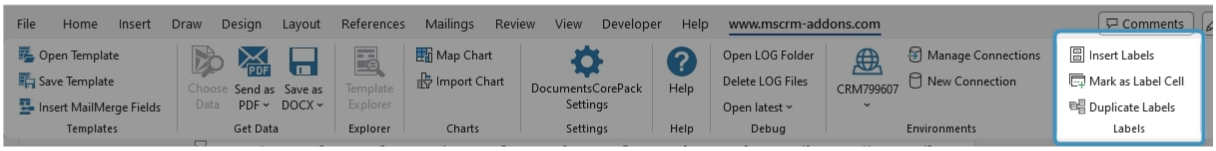


Figure 76: Word ribbon with additional options

Step 3: Press **Insert Label** and the **Label Options** open. Here you can make decisions about your label dimensions. Confirm with **OK**.

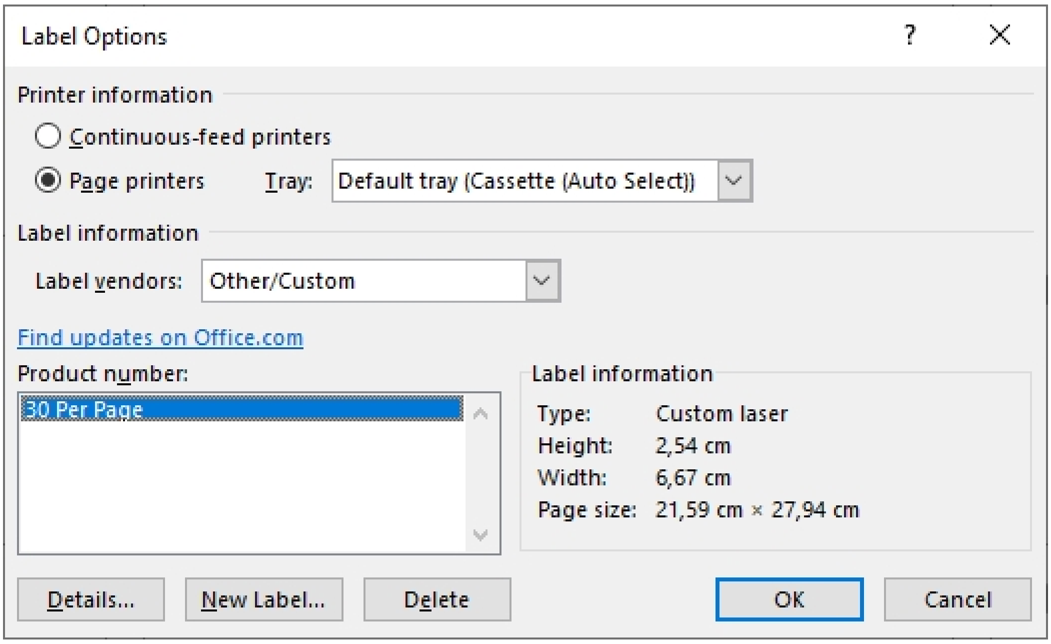


Figure 77: Label Options

Step 4: The selected label format has been inserted into your template.

Please note: If you cannot see any grid lines to limit the label cells, you can make them visible by navigating to the **Layout** tab and selecting **View Gridlines**. They will not be displayed in the result, but it can help manage your label content in the preparations for your template, as the label cells are arranged from left to right and from top to bottom.

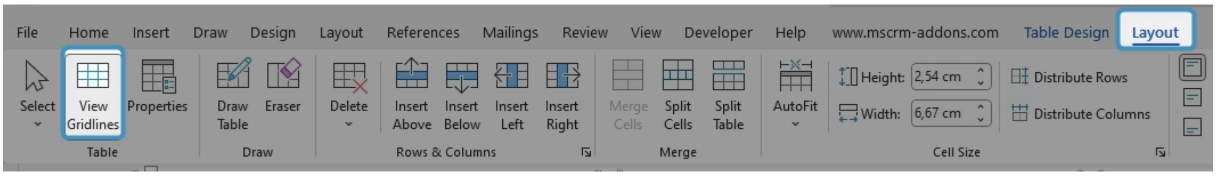


Figure 78: Word ribbon - Layout Setting

Next, it is important to mark one cell as the **label-cell**. To do so, simply set the cursor in the first cell of the document and click on the **Mark as Label Cell** button.

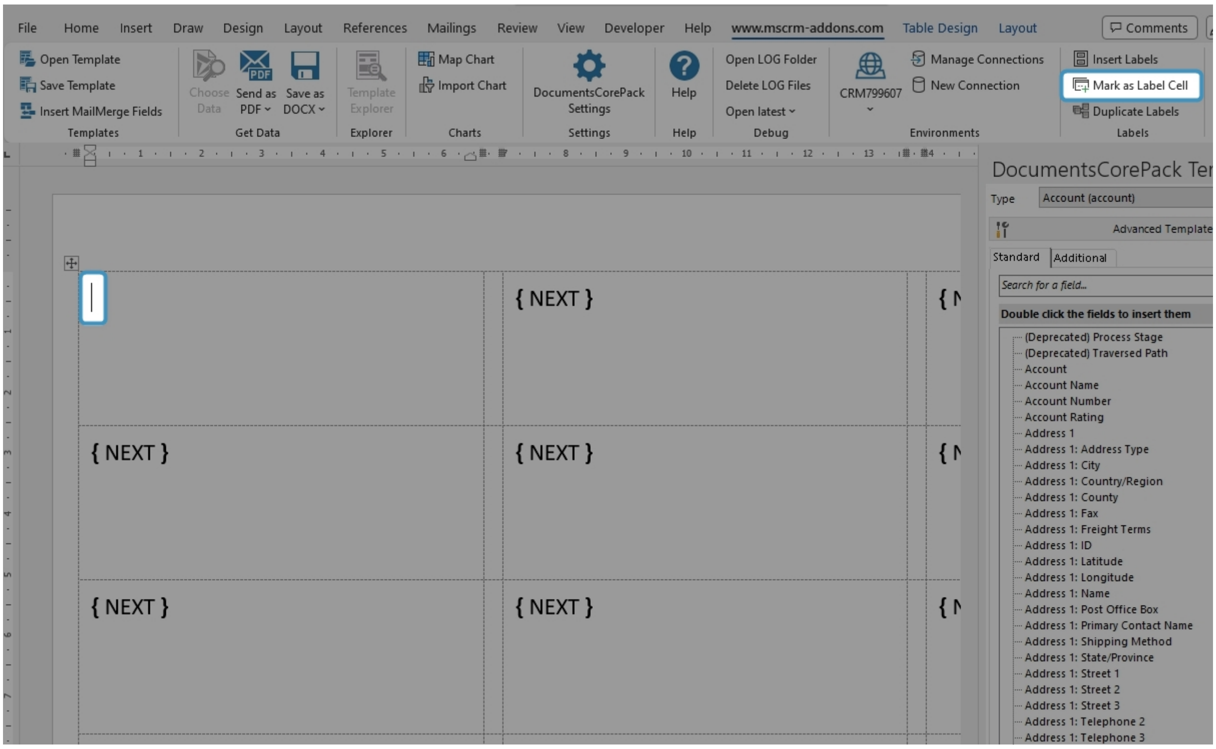


Figure 79: Mark as Label-cell

Step 5: Once the cell is marked, select an entity, such as **Account.** Then insert fields into the label-cell by double clicking on them.

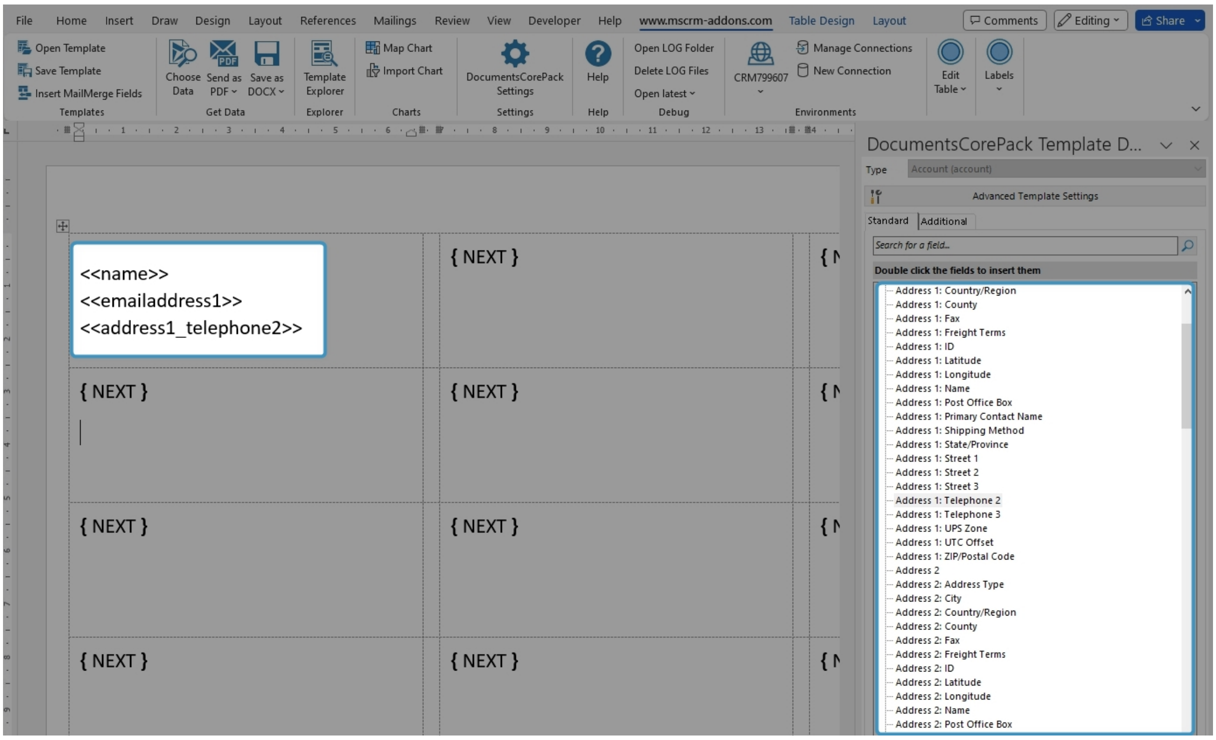


Figure 80: Insert fields to the Label-cell

Step 6: Next, you need to define the remaining cells as label-cells as well. To do so, place your cursor in the first cell and click on the **Duplicate Labels** button.

This information message reminds you to check your cursor. Confirm it.

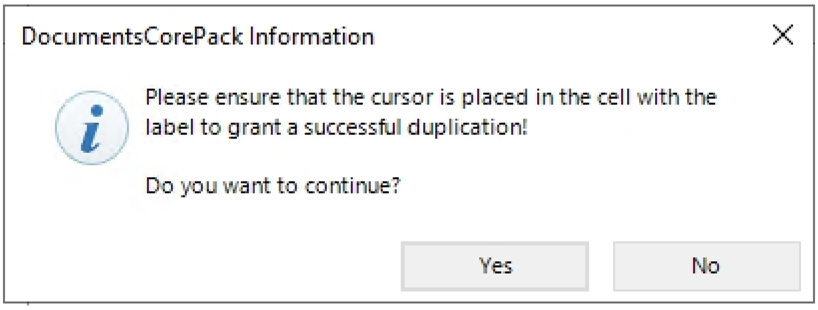


Figure 81: DocumentsCorePack Information

You have successfully created a Label Template.

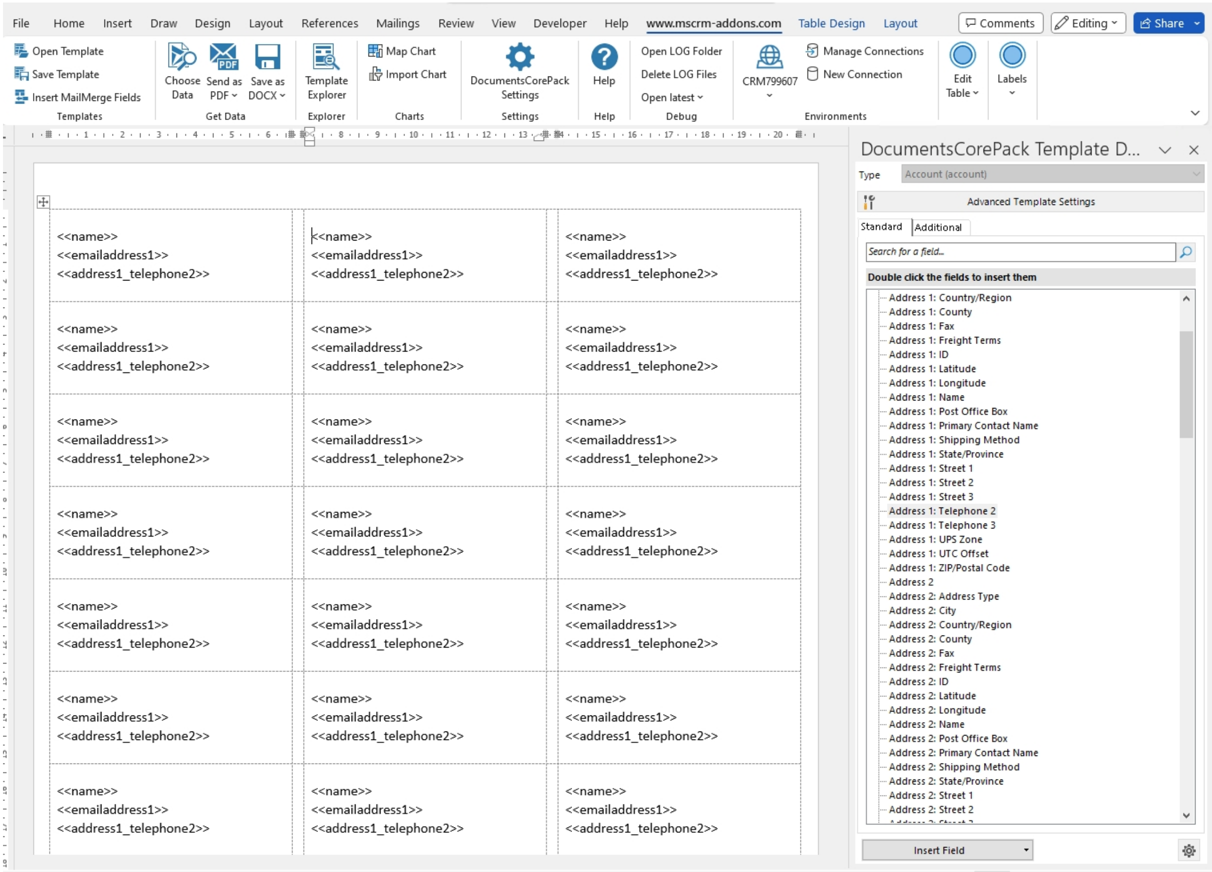


Figure 82: Successfully created Label Template

Step 7: With the **Save Template** you save it to Dynamics 365.

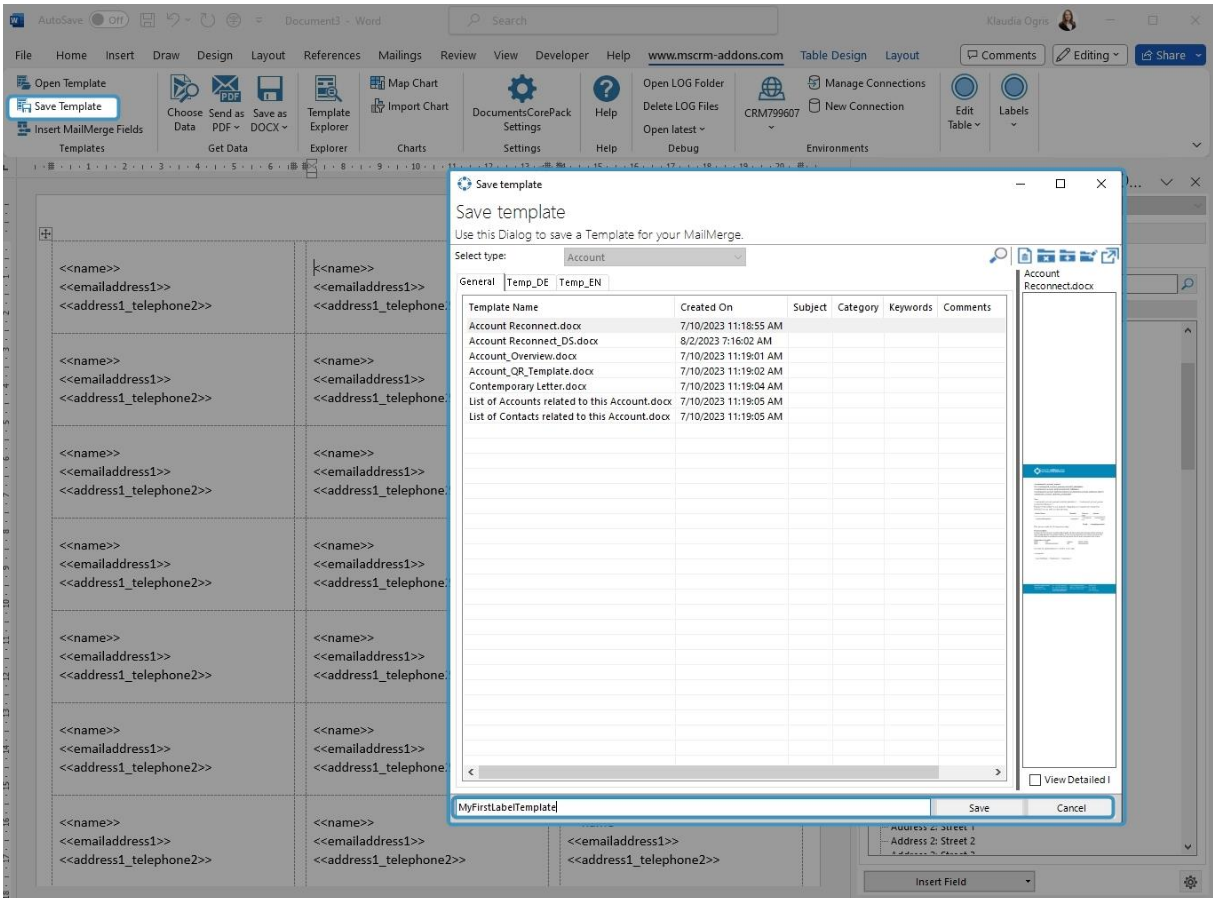
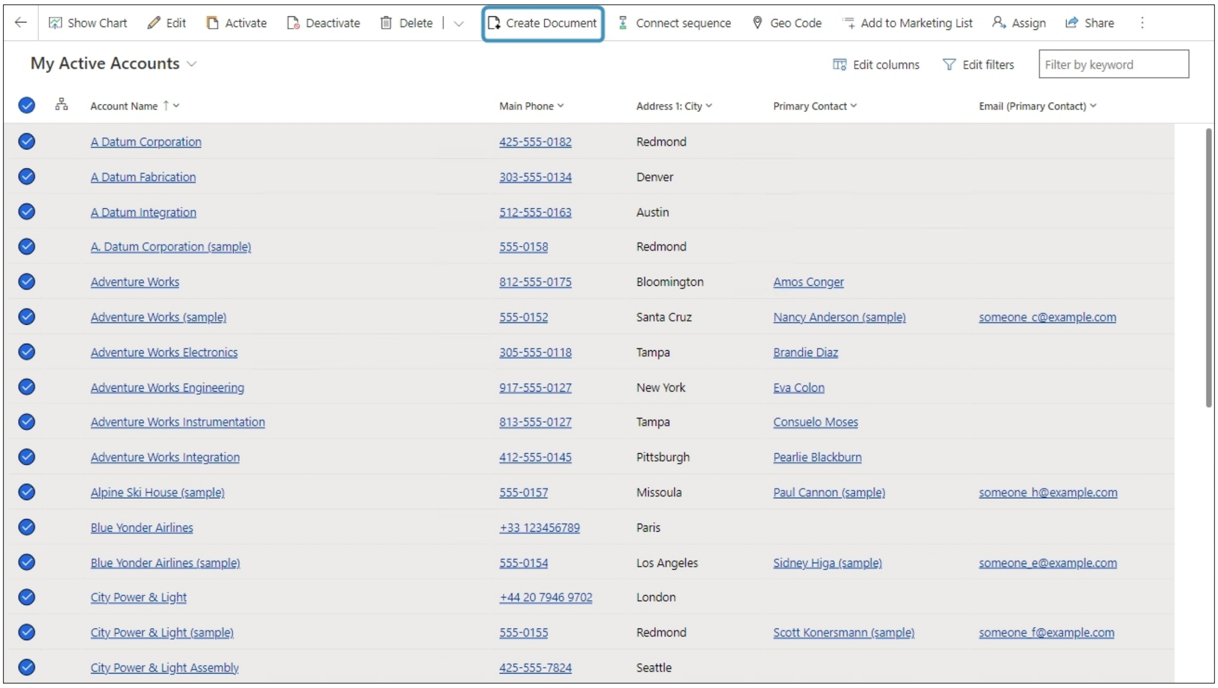


Figure 83: Save Template

6.5.2 How to merge a label template with various records at once

To merge a label template for various records, navigate to **Accounts** in your **Dynamics 365** and mark the companies you want to merge. Press the **Create Document** button.



Account Name	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
A Datum Corporation	425-555-0182	Redmond		
A Datum Fabrication	303-555-0134	Denver		
A Datum Integration	512-555-0163	Austin		
A. Datum Corporation (sample)	555-0158	Redmond		
Adventure Works	812-555-0175	Bloomington	Amos Conger	
Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com
Adventure Works Electronics	305-555-0118	Tampa	Brandie Diaz	
Adventure Works Engineering	917-555-0127	New York	Eva Colon	
Adventure Works Instrumentation	813-555-0127	Tampa	Consuelo Moses	
Adventure Works Integration	412-555-0145	Pittsburgh	Pearlie Blackburn	
Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@example.com
Blue Yonder Airlines	+33 123456789	Paris		
Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)	someone_e@example.com
City Power & Light	+44 20 7946 9702	London		
City Power & Light (sample)	555-0155	Redmond	Scott Konersmann (sample)	someone_f@example.com
City Power & Light Assembly	425-555-7824	Seattle		

Figure 84: Marked Accounts in your Dynamics 365

The DocumentsCorePack dialog opens. Select your **Label Template** and click **Next.**

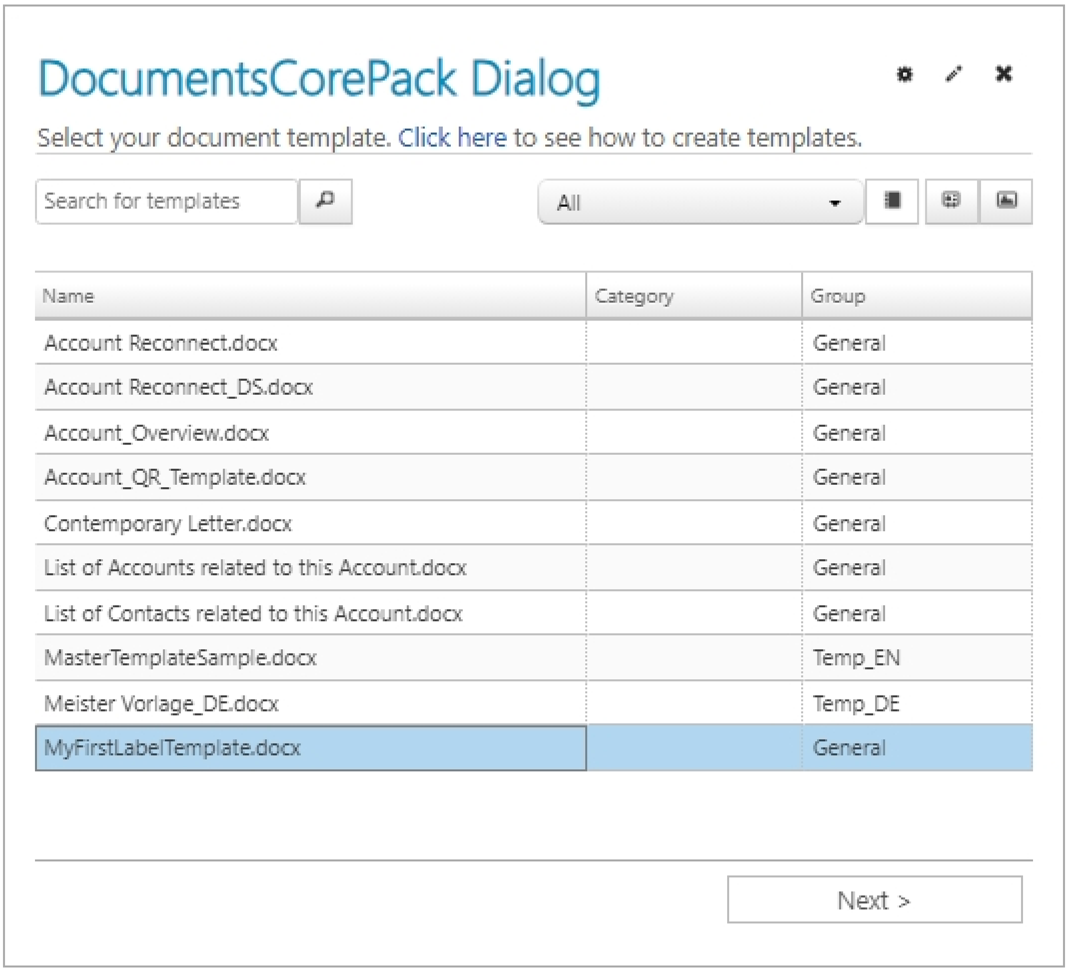


Figure 85: DocumentsCorePack Dialog

Choose the **FileType** and decide on your **Label Start Position**. If you want to send this document directly to the printer, select **Print document**. Then click on **Create Labels.**

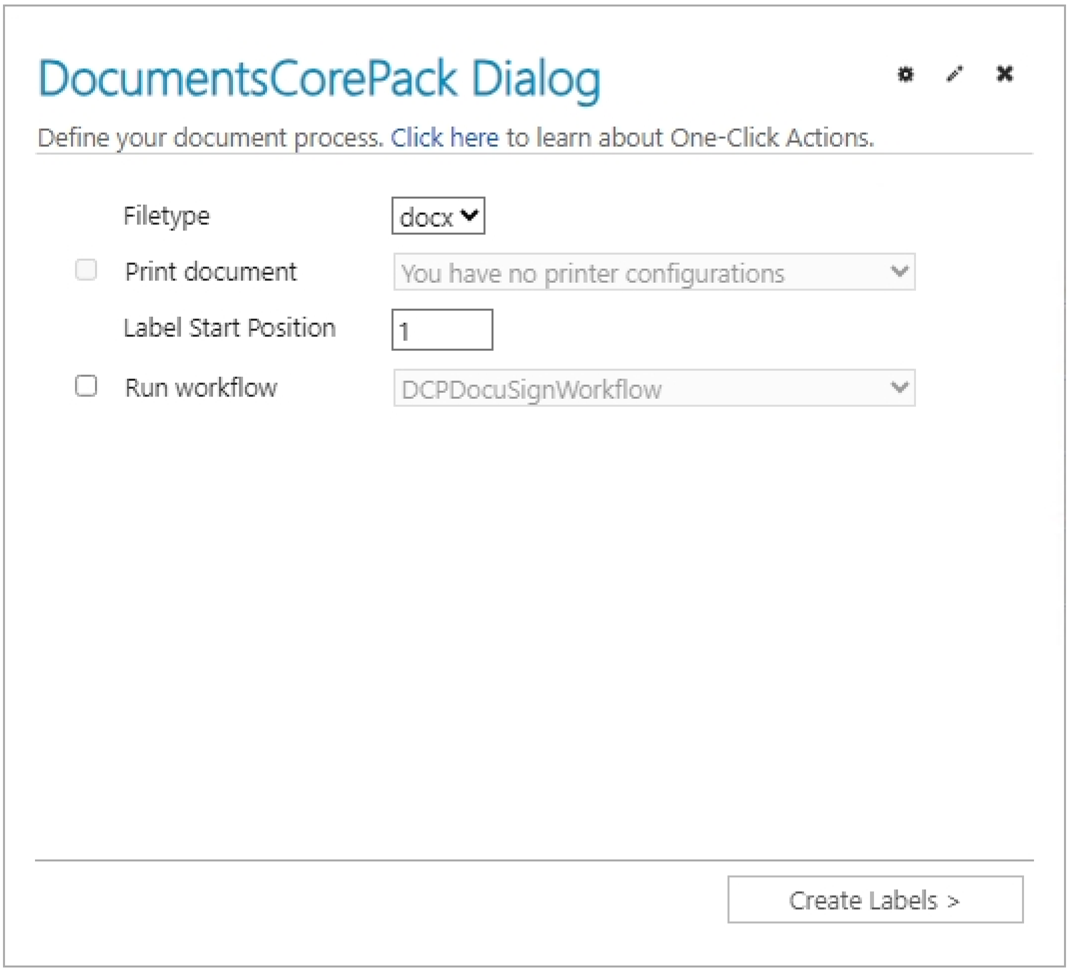


Figure 86: Determine Label Start Position

Before you finish your Label Template, you can have a preview. If it looks correct, press the **Finish** button.

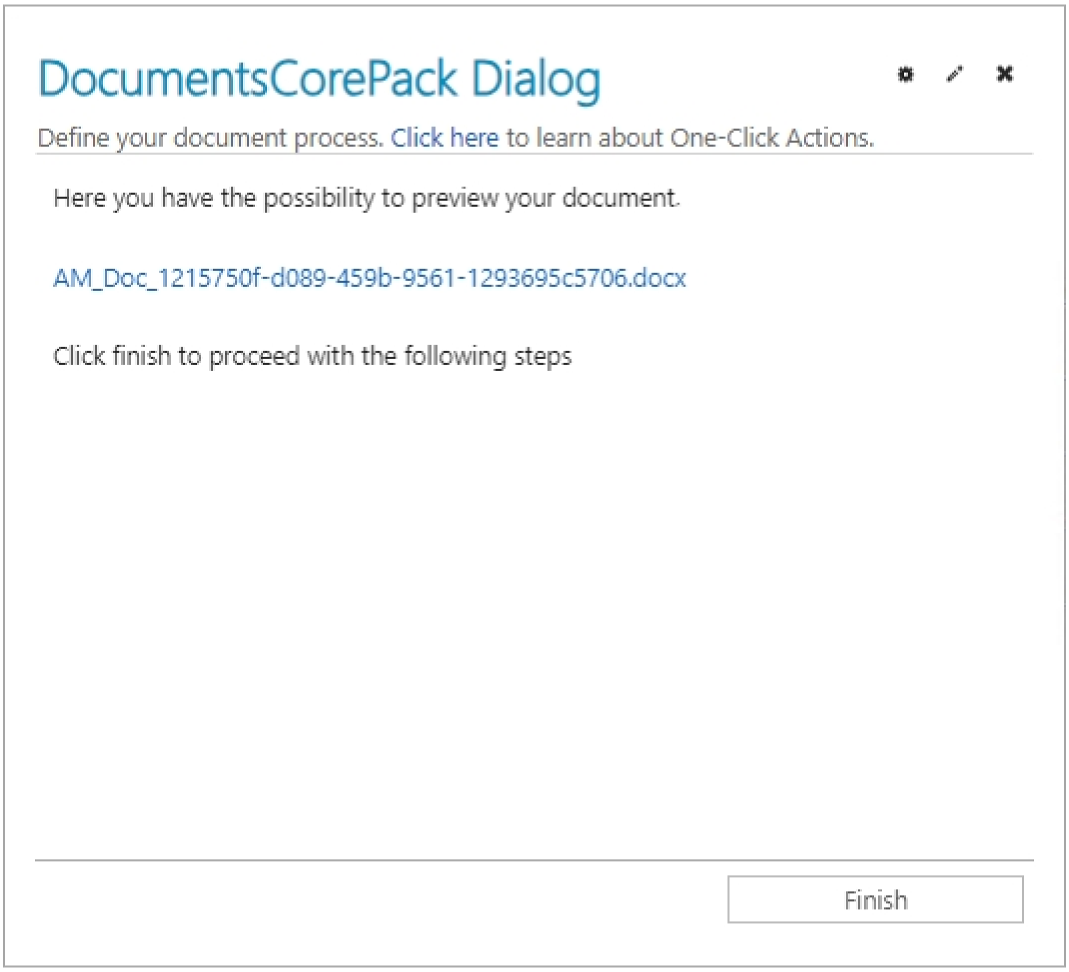


Figure 87: Template Preview

The result should look like the below example.

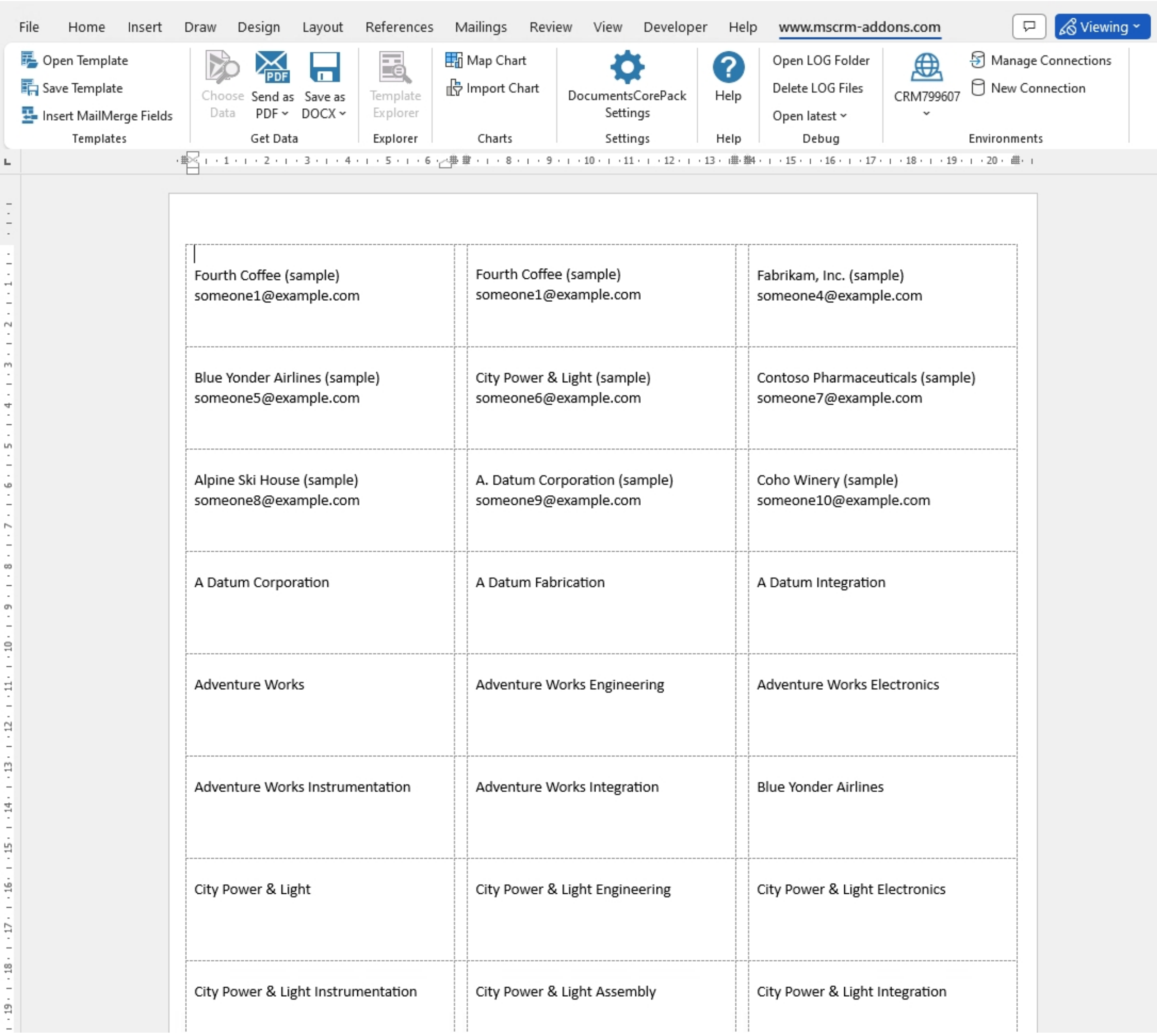


Figure 88: Example of a merged Label Template

6.5.2 Option B – Select one record and set relations

Please note: In general, all Microsoft Word formatting options are supported. However, the label template must be created in advance and saved as .docx. It is mandatory to set a regarding **relationship** when creating the template in advance.

Step 1: To create your label template, first follow **steps 1-4** of **Option A**. Next, switch to the ❶ **Additional** tab, click on the ❷ **Add Relationship/Entity** drop-down menu and click on ❸ **All Contacts** for example. This makes sure that the relation is set.

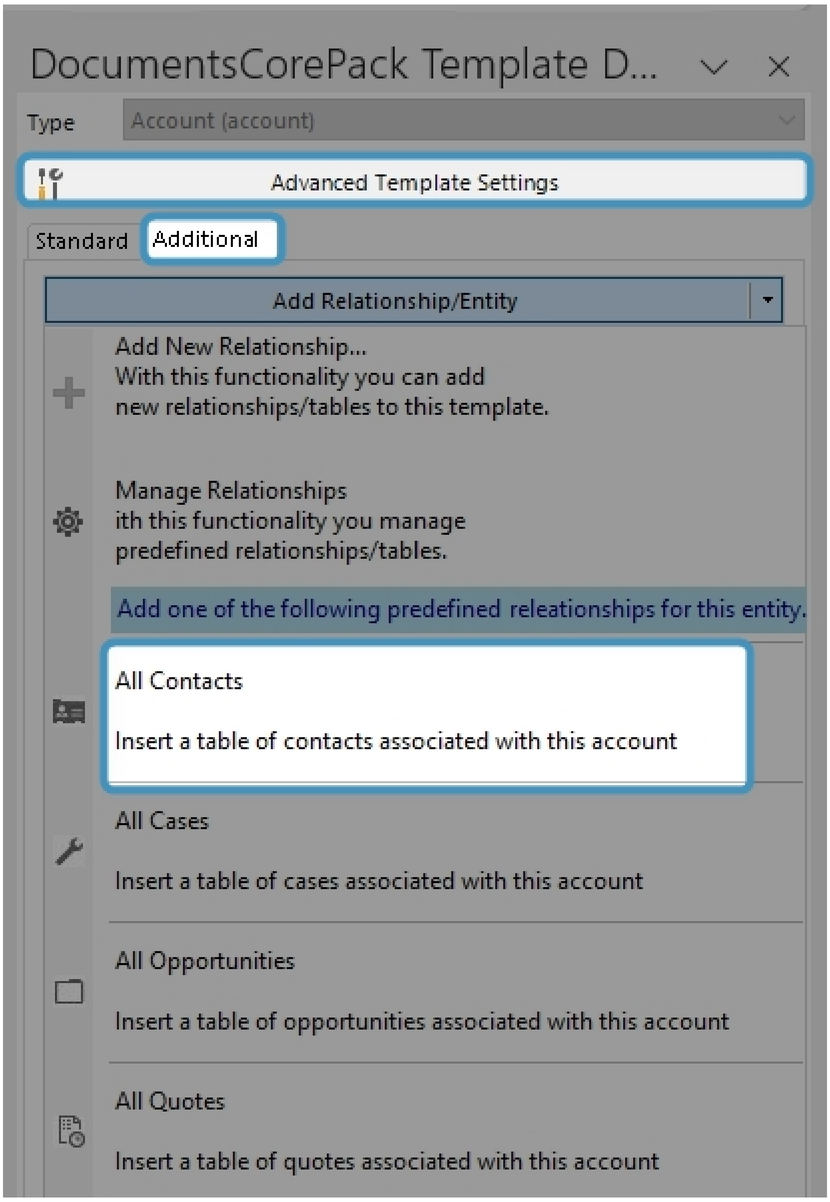


Figure 89: Add a relationship via the Additional tab

Step 2: Now that the relation is set, you can choose the appropriate fields from the DocumentsCorePack Task Pane. Continue on with **step 5 of Option A** and create and save your label template.

Step 3: Once you are finished, please navigate to the main form of your **Account** entity in your **Dynamics 365** and mark all contacts that should be displayed on the label. Next, click on the **Create Document** button, select your label template, and press **Next.**

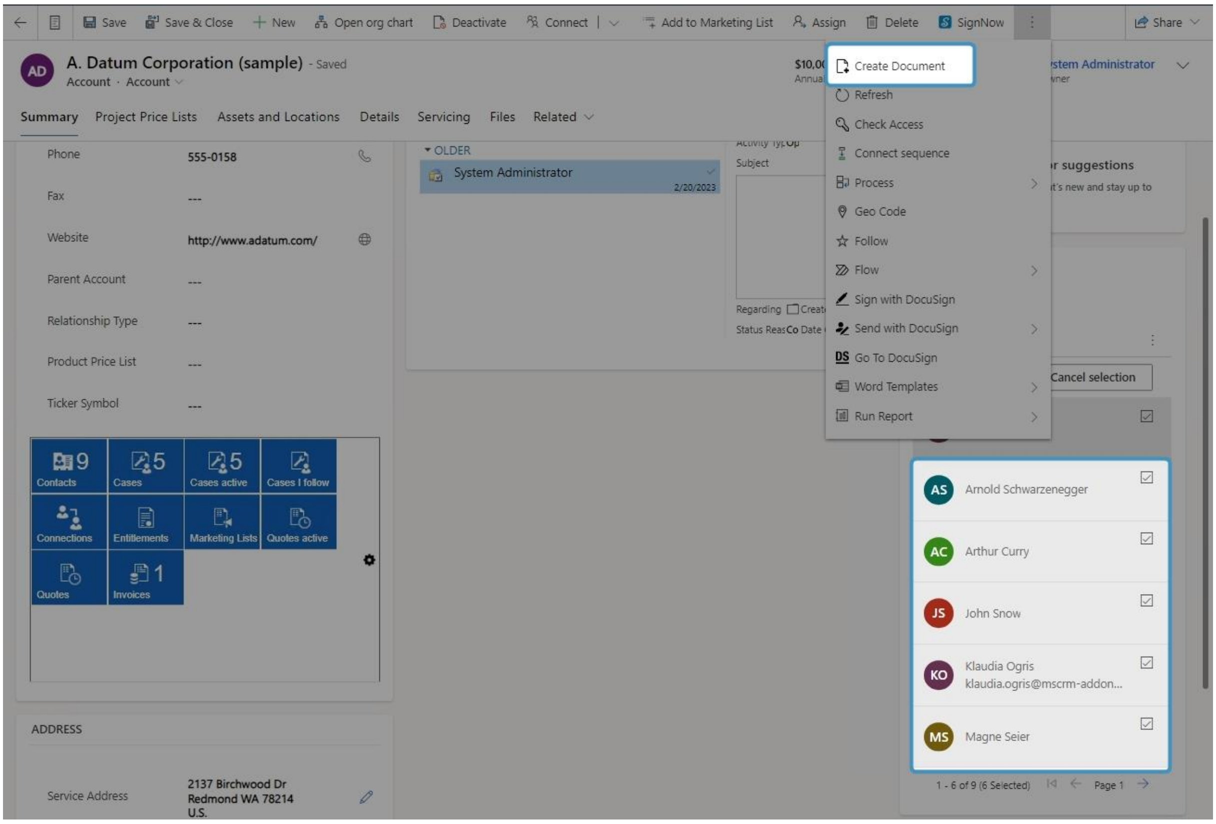


Figure 90: Mark contacts that should be displayed

Step 4: The DocumentsCorePack dialog opens. Select your label template.

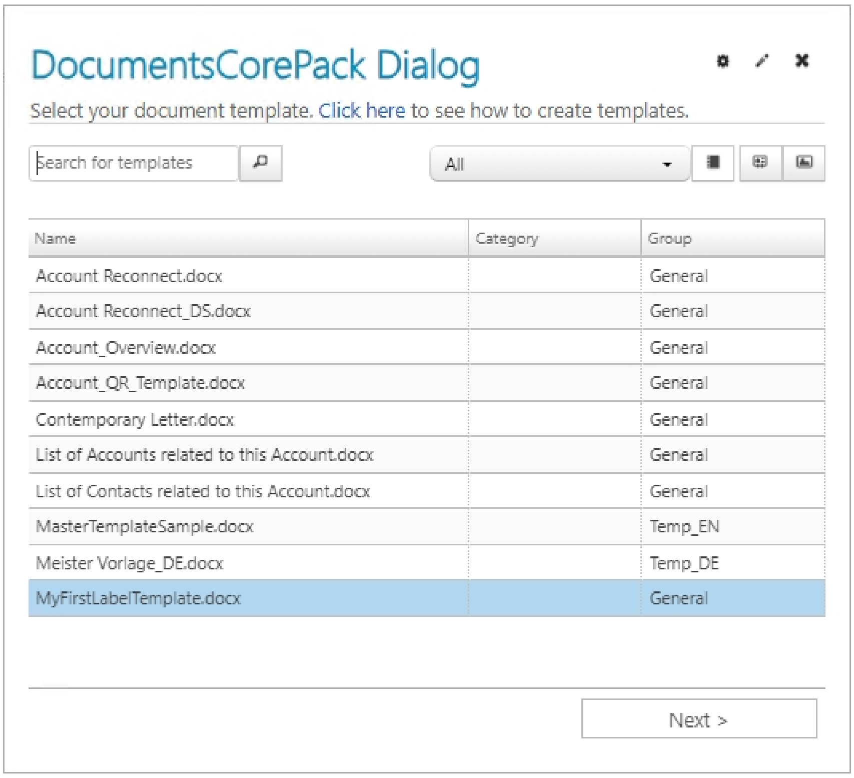


Figure 91: Select the Label template

Step 5: Choose the **FileType** and decide on your **Label Start Position**. If you want to send this document directly to the printer, select **Print document**. Next, select **Create Labels**.

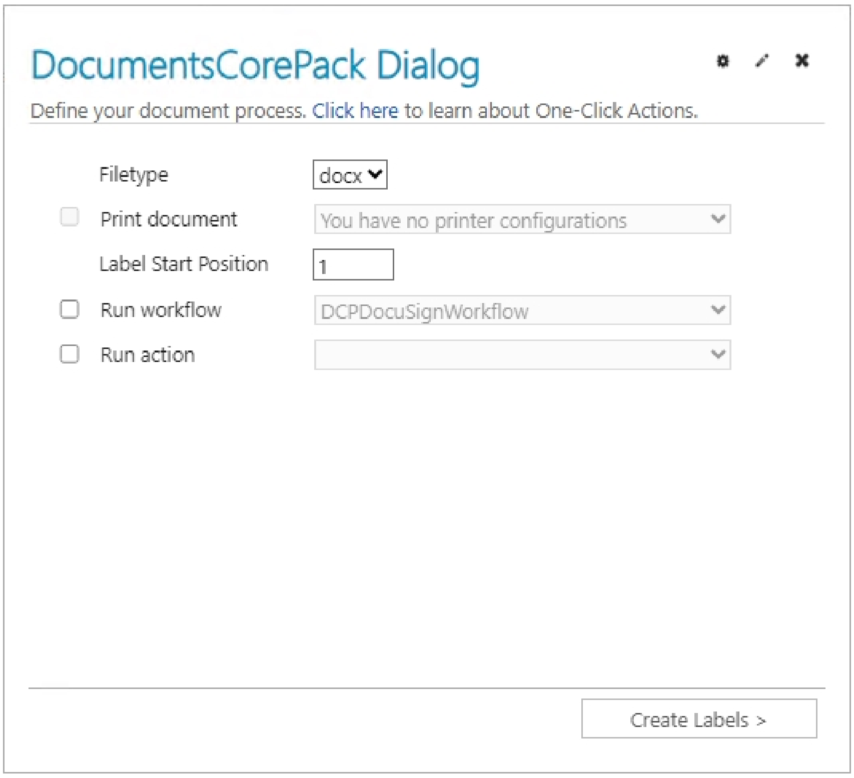


Figure 92: Choose file type and label position

Step 6: The option to preview your document appears. Click **Finish**.

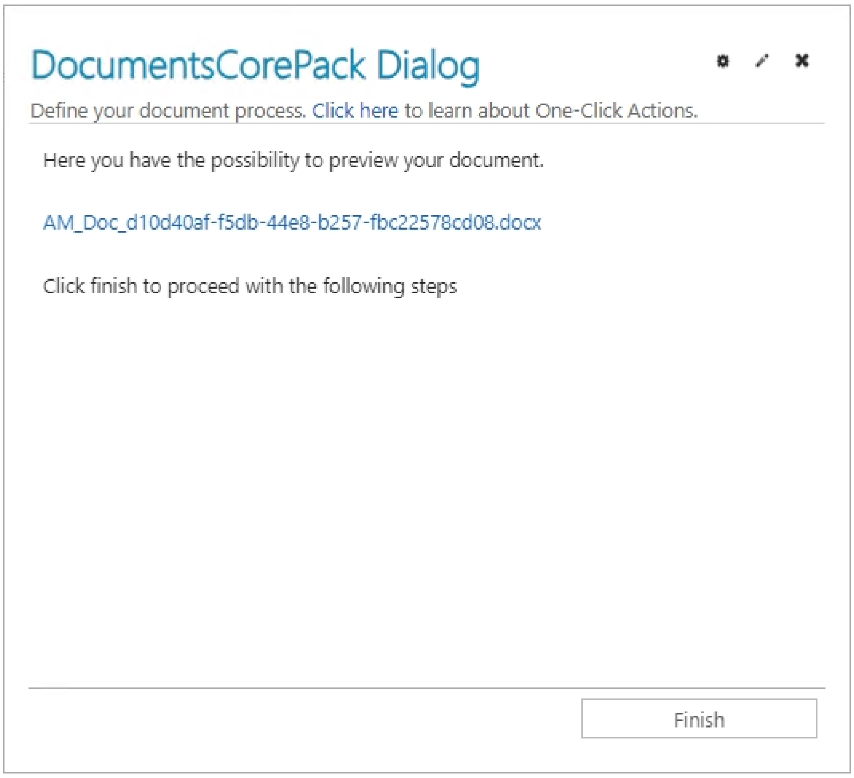


Figure 93: Preview

Step 7: Enjoy your result.

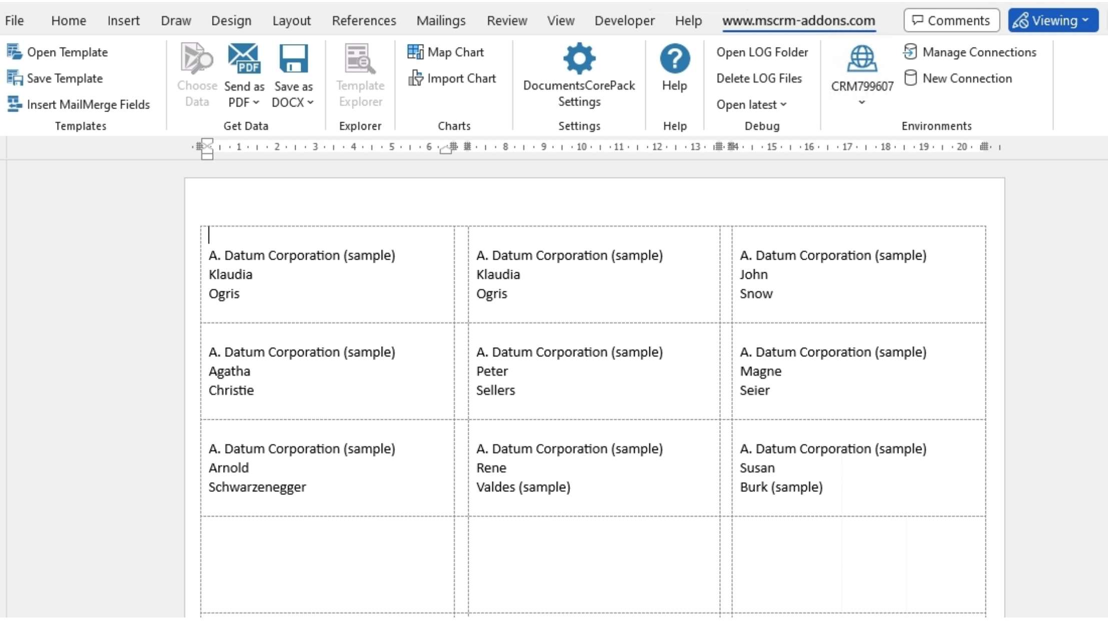


Figure 94: Result with selected record and set relations

6.6. How to create a relation from scratch

This "How to" describes how to create a relationship from scratch with DocumentsCorePack Template Designer. Relations can be solved for 1:N (1:many) and N:N (many:many) relationships. All custom entities, as well as system entities, are supported.

Step 1: Create a template and insert fields.

As you see below, we have inserted the following fields: **<<accountid>>** and **<<name>>**

Figure 95: Create template and insert fields

Step 2: Add a new relationship

Next, go to the **Additional** tab and open the **Add Relationship/Entity** drop-down menu. Then, select **Add New Relationship**.

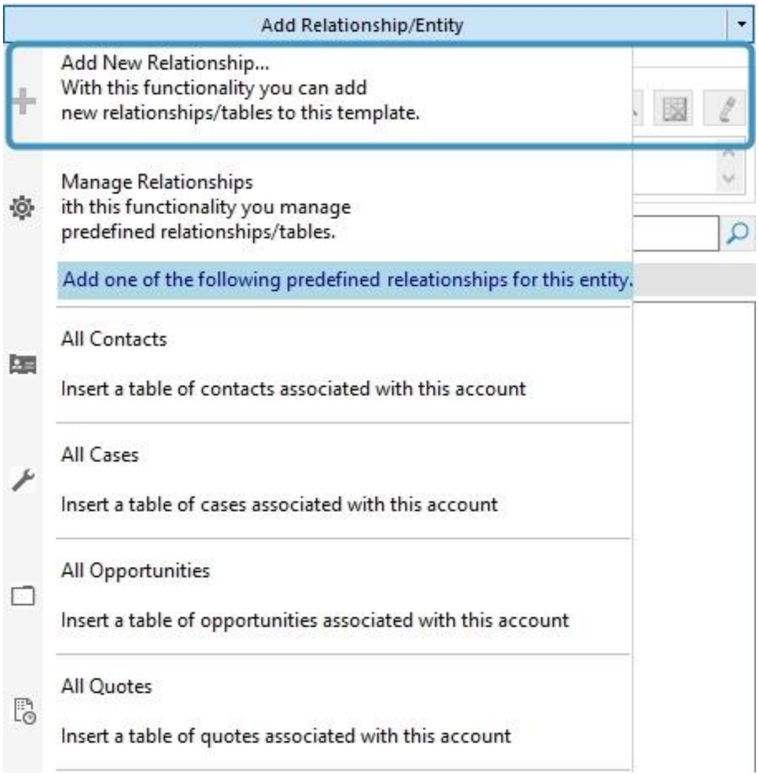


Figure 96: Add a new relationship

The **Configure Fields and Datasource** dialog will open. Select a relationship you would like to insert 1 and add attributes by checking the boxes next to the attributes 2. In the example below, we have chosen the relationship **Account > Activity [regardingobjectid]** and added the following attributes: **Activity**, **Actual End**, **Actual Start**, and **Due Date**.

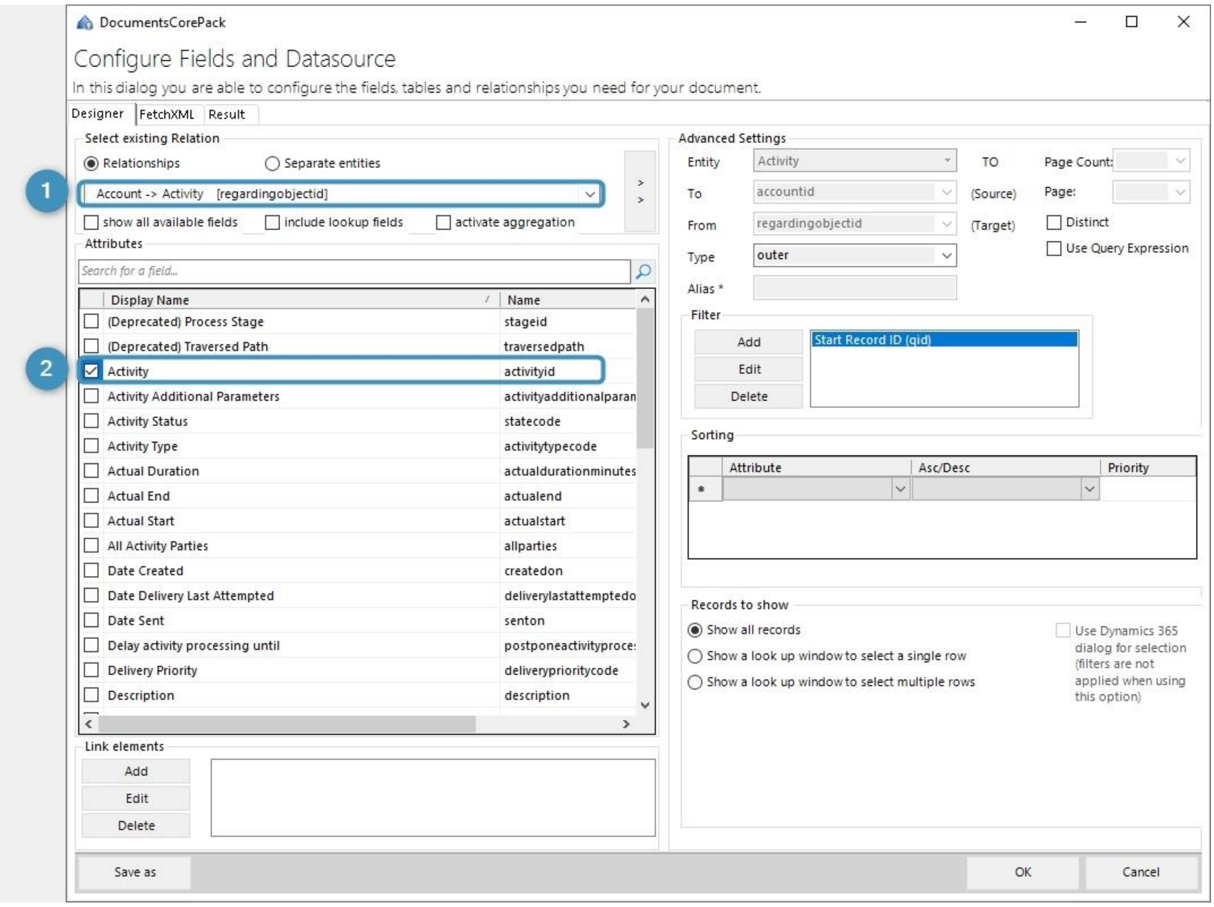


Figure 97: Add a new relationship

The chosen attributes of the entity are now also visible in the **Additional** tab of the Template Designer. From here, you can insert any of the fields into the document. However, there are usually more complex relationships needed. That is why you may expand the complexity of the relationship by adding more levels.

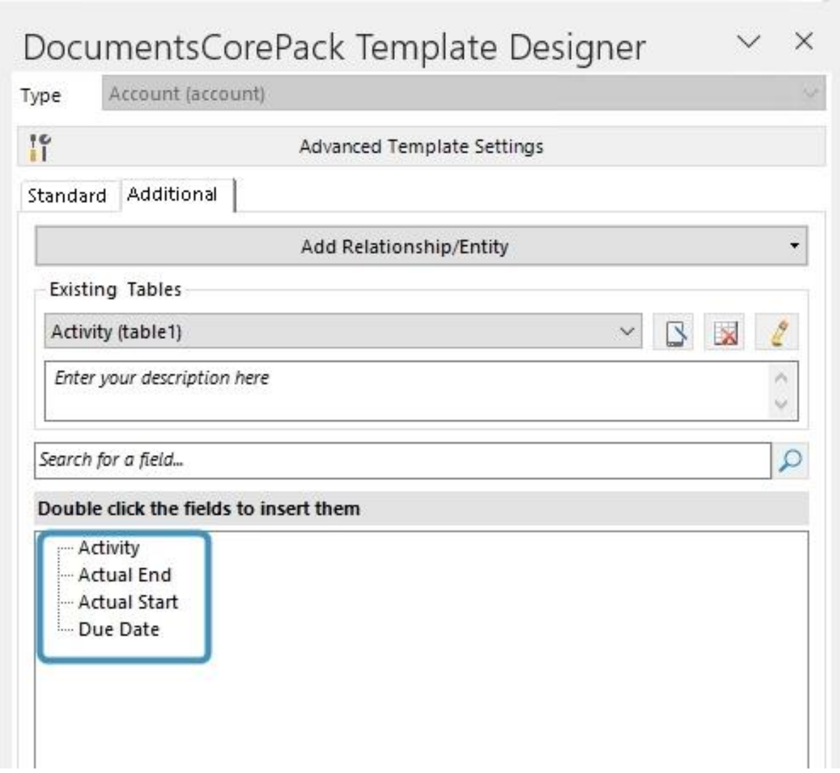


Figure 98: Resolved fields

Step 3: Add further relationships.

If you would like to add further relationships, click **Edit** in the **Additional** tab.

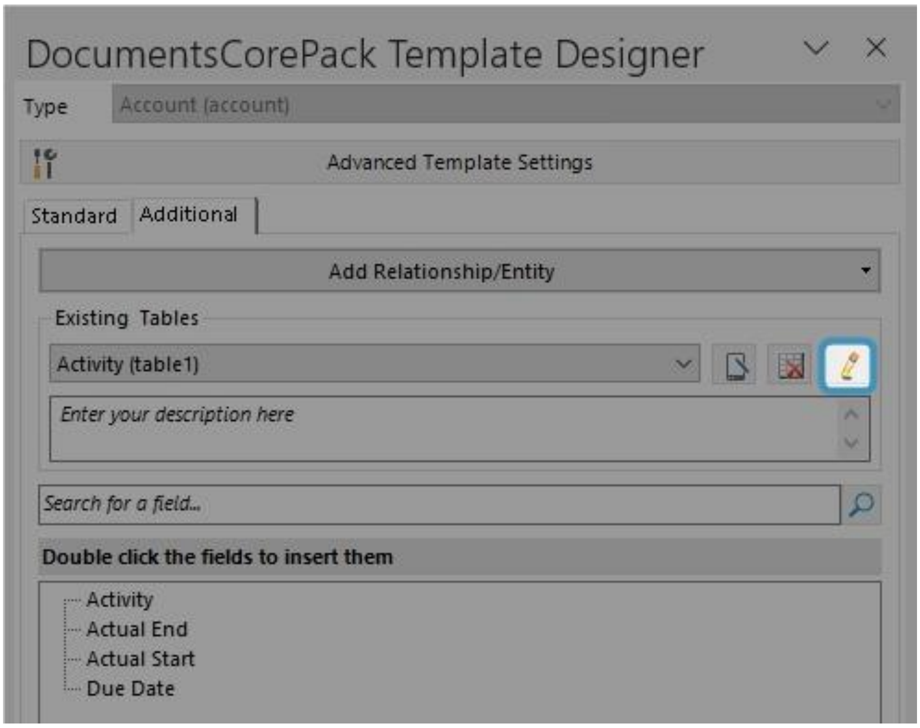


Figure 99: For adding further relationships click Edit

This action opens the **Configure Fields and Datasource** dialog again, providing you with the former established relationship. Select 1 **Add** and add another relationship 2 here. In the example below, we added **Activity [activityid] -> Attachment [objected]** and the entities 3 **Attachment Number**, **Entity**, **File Name**, **Subject**.

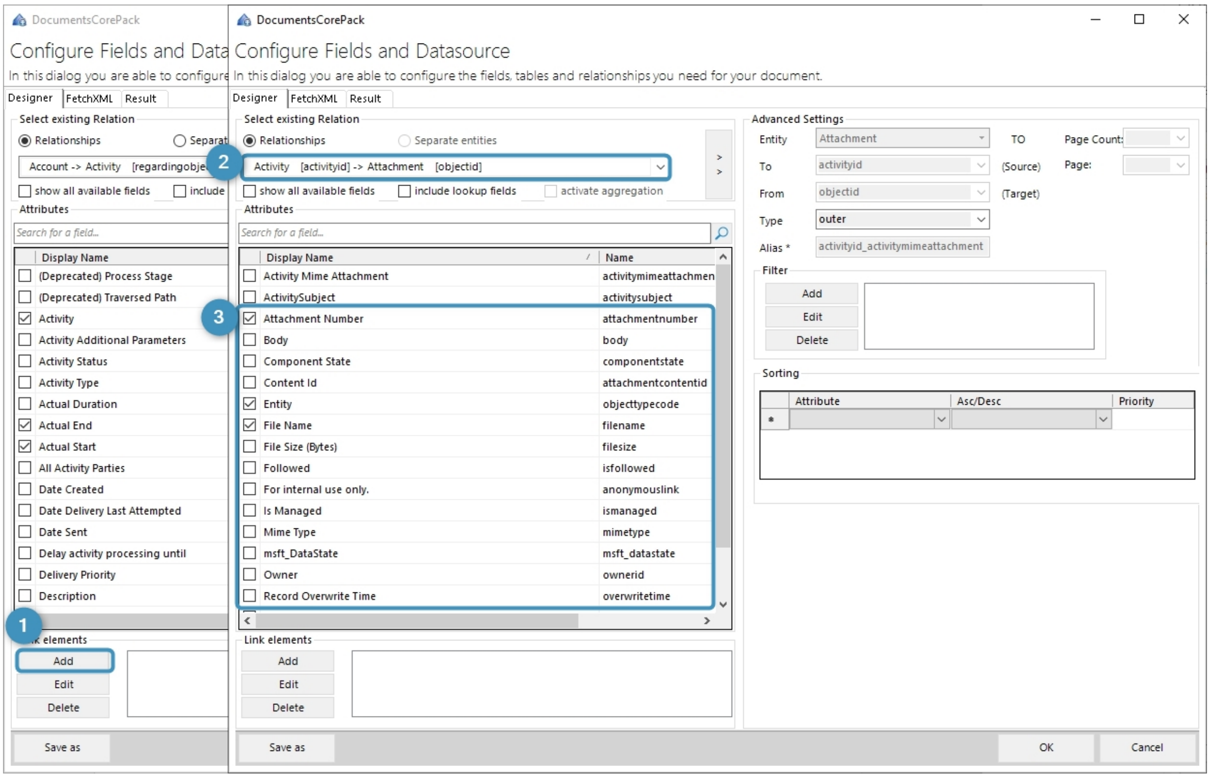


Figure 100: Add another relationship

As you can see, the resolved entities are now also visible in the **Additional** tab of the Template Designer. From here, you can insert any of the fields into the document.

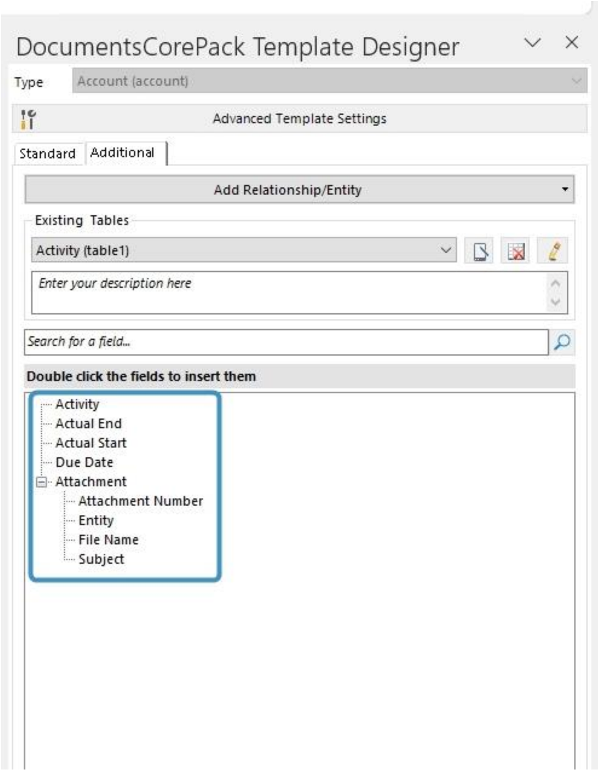


Figure 101: Additional resolved fields

Please note: You may repeat these steps as often as you would like to in order to enhance the complexity of your relationships.

6.7.How to create a relation to a separate entity

The creation of a relation to a separate entity follows the same rules as the creation of an entity from scratch, with one exception. In order to create a relation to a separate entity, follow the steps in chapter 5.6 carefully, but make sure that you change the following parameter when you select a new relationship:

Instead of checking **Relationships**, check **Separate Entities** 1 in the **Select existing Relation** section. The main difference is that you will now be provided with separate entities 2 instead of relationships.

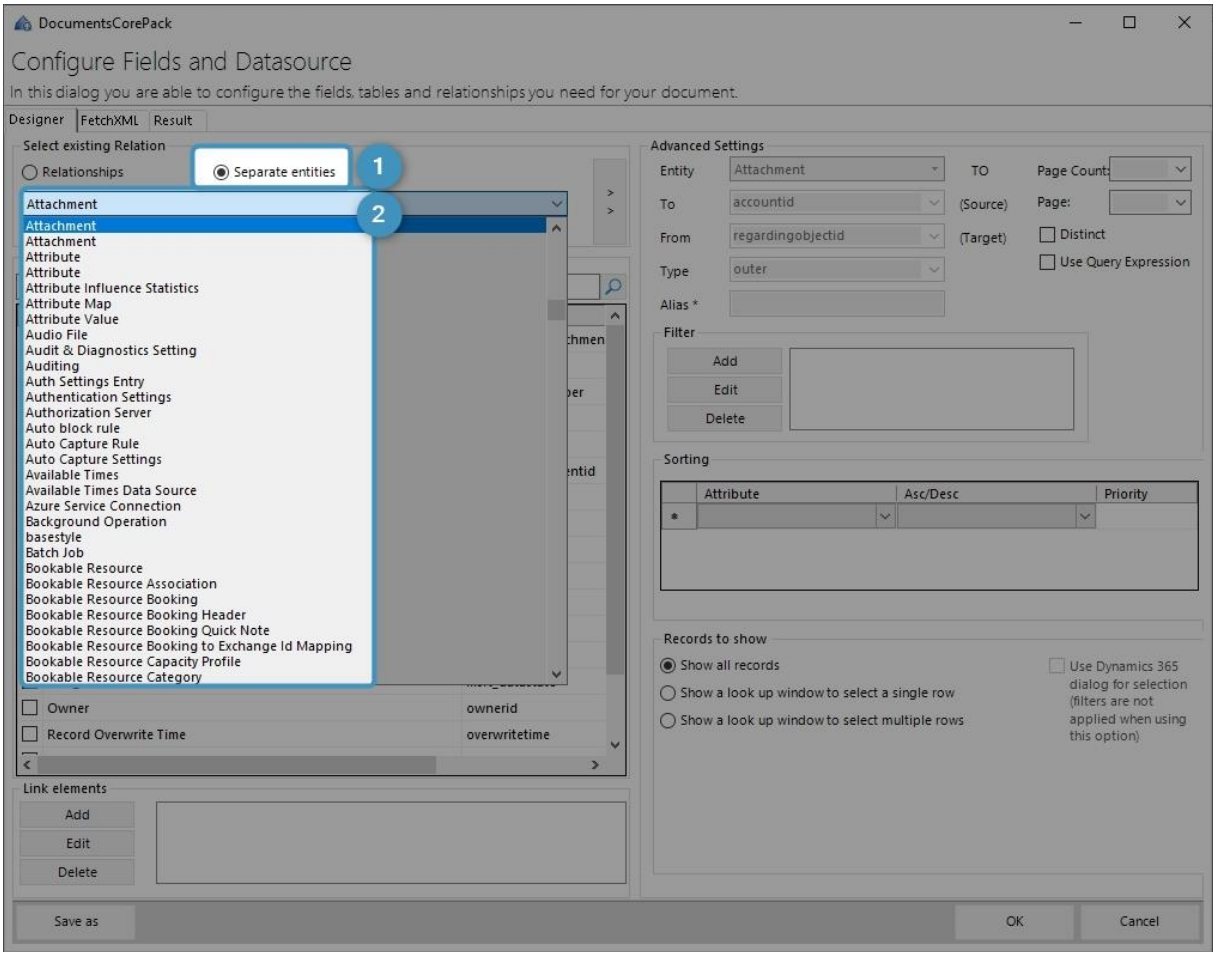


Figure 102: Insert separate entities

6.8. Aggregation in DocumentsCorePack – Overview

Here is an overview of the aggregation functionality in Microsoft Dynamics 365, which we have integrated into our DocumentsCorePack Template Designer.

This feature proves to be highly valuable when you need to generate a comprehensive summary of specific data and perform calculations such as summing revenues or sales, calculating averages, and creating reports for different time periods (quarterly, yearly, monthly, or daily).

Aggregation fetches enable you to calculate sums, average minimum & maximum, and count items. All aggregation methods supported by Microsoft Dynamics CRM can be easily applied to any template, although the selection of aggregation functionalities depends on the field selected.

The aggregation fetches allow you to perform various calculations, including sum, average, minimum, maximum, and count, on specific items. All these aggregation methods supported by Microsoft Dynamics CRM can be easily applied to any template. The selection of aggregation functionalities depends on the chosen field.

- **AVG:** Average functionality is used for aggregating numerical values. It calculates the average (mean) of a specific field or attribute across multiple records or entities. With this functionality you can gain insights into your data's average performance, behavior, or results, allowing you to make data-driven decisions and track essential metrics for your business.

Please note: 0 is not considered when the average is calculated. However, the result of a calculation including 0 is replaced by zero (0).

- **COUNT (Sub-functionalities: COUNTCOLUMN, COUNT DISTINCT COLUMNS):** The function allows you to calculate the total number of records or entities that meet specific criteria. The Count functionality is used to perform counting operations within CRM data.
- **MAX**: Is used to find the maximum (largest) value of a specific field or attribute within a set of records. For example, you can use MAX to identify the highest sales amount, the latest date, or the maximum quantity in each dataset.

Please note: 0 is not considered when the maximum value is calculated. However, the result of a calculation including 0 is replaced by zero (0).

- **MIN**: It is a function that helps you find the minimum (smallest) value of a field or attribute within a set of records. You can use MIN to determine the lowest sales amount, the earliest date, or the minimum quantity in a dataset.
- **SUM**: This is a function used to calculate the total sum of a numerical field or attribute across a set of records. It adds up the values within the specified field to provide a cumulative total. For instance, you can use SUM to calculate the total revenue, the total quantity sold, or the sum of expenses.
- **MULTIPLE AGGREGATES**: Multiple Aggregates refer to performing multiple aggregations on a dataset simultaneously. It involves calculating multiple summary statistics, such as sum, count, average, min, or max, across different fields or attributes simultaneously. This allows you to obtain various insights and analyze different aspects of your data in a single operation.
- **GROUP BY:** This is a clause used to group records based on one or more specific fields or attributes. It divides the data into subsets or categories based on the specified criteria. When combined with aggregate functions like SUM or COUNT, it allows you to calculate summary statistics within each group separately. For example, you can group sales data by region to determine the total sales amount per region.

    - **GROUP BY WITH LINKED ENTITY:** This sub-functionality enables you to use the sum aggregate attribute to sum linked entity values.
    - **GROUP BY YEAR, QUARTER, MONTH, WEEK, or DAY:** These sub-functionalities enable you to group results by year, quarter, month, week, or day.

- **MULTIPLE GROUP BY:** This functionality enables you to use multiple groups by clauses.

- **ORDER BY:** This is a clause used to sort the records in a specific order based on one or more fields or attributes. It arranges the data in ascending or descending order. ORDER BY is often used in conjunction with aggregate functions to sort the aggregated results based on a specific criterion. For instance, you can order a list of customers by their total purchase amount in descending order.

6.8.1 How to use Aggregation properly when creating templates

Aggregated fetches are a useful functionality when creating templates. They allow you to create an overview of certain data and sum or calculate the average of revenues or sales. They can also create quarterly, yearly, monthly, or daily reports.

Step-by-step description

Step 1: Open **Word and** navigate to the 1 **www.mscrm-addons.com** tab, and click on the 2 **Insert MailMerge fields** button. The **DocumentsCorePack Question Dialog** opens. Click **Yes** to open the DCP Template Designer.

Figure 103: How to open DocumentsCorePack Template Designer

Step 2: In the opened **Template Designer**, select the entity type you would like to work on, like 1 **Account** in this example**.** Click on the 2 **Additional** tab and the 3 **Add Relationship/Entity** button.

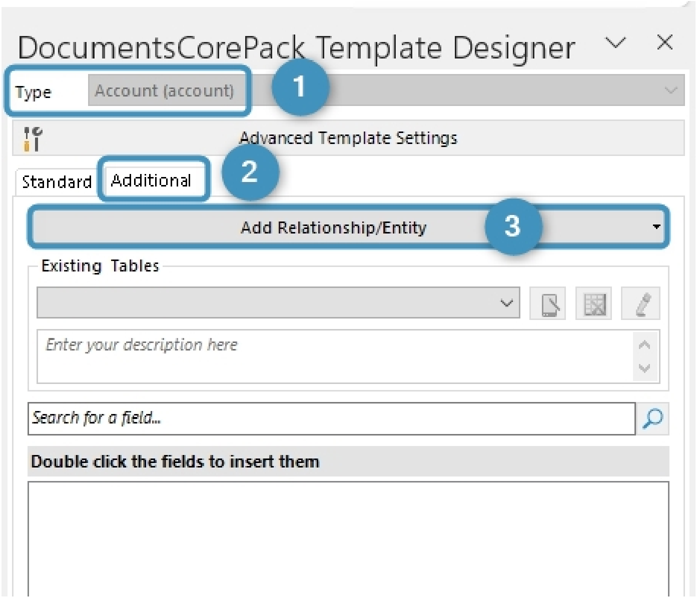


Figure 104: Add a relationship

Step 3: In the opened dialog, select a relationship in the drop-down menu. In our example, we selected **Account** > **Contact [parentcustomerid]**. Check the **activate aggregation** functionality.

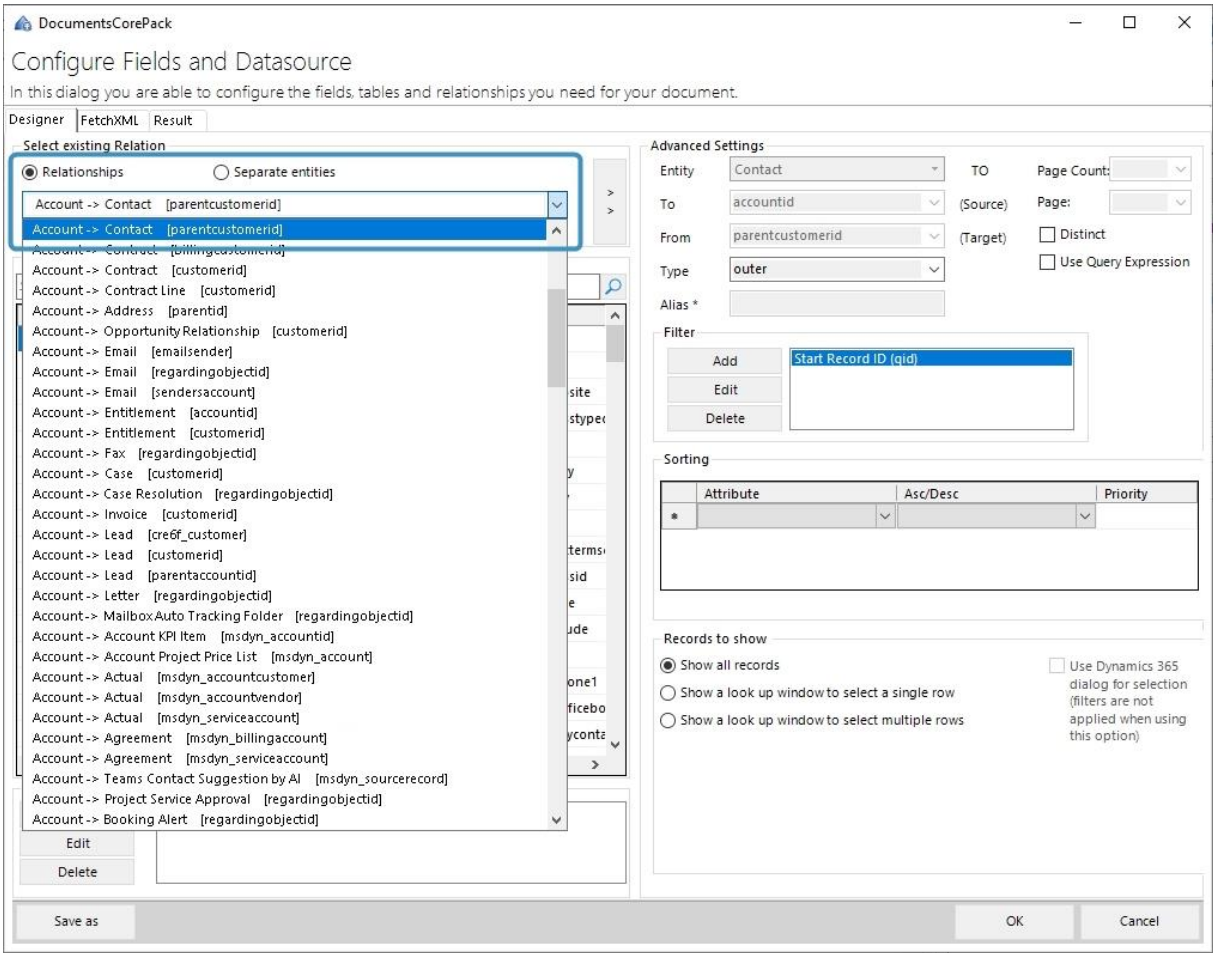


Figure 105: Active Aggregation

Step 4: In the open window, you can set certain aggregation functionalities. The **Attribute** drop-down menu enables you to select an attribute field, while the **Aggregate/Group by** drop-down menu provides you with an overview of which aggregation functionalities can be applied to this field.

Please note: The possible aggregation functionalities depend on the attribute field you select. Click on the **OK** button to proceed.

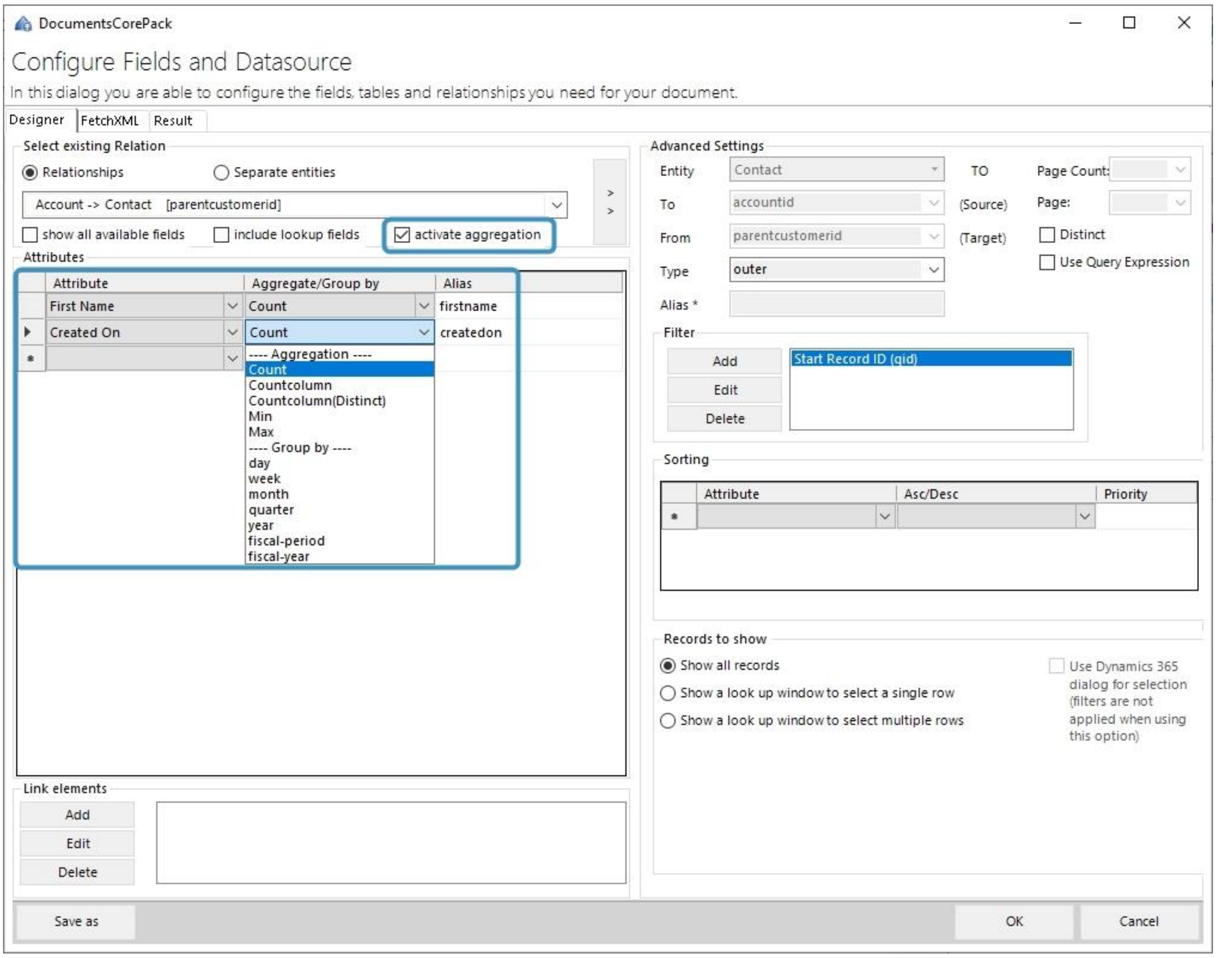


Figure 106: Set the aggregation functionality

Step 5: Insert the newly resolved relationship
Now click somewhere in your template and double-click on the field of the new relationship on the right side.
As shown in Figure 5, the relationship consists of two parts:

1. **First name** → the name of the field.
2. **(count)** → explains the aggregation functionality that has been applied to the relationship.

Now insert your preferred table settings and click on the **OK** button.

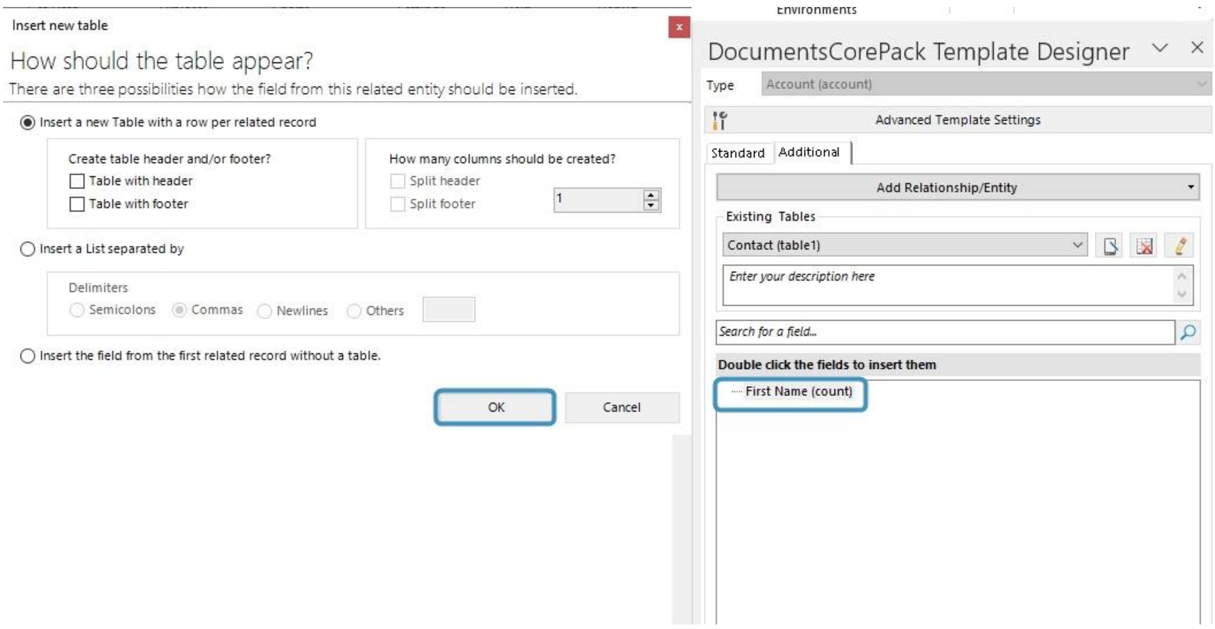


Figure 107: Insert resolved relationship

Step 6: We decided to insert a table with a header in our example. The resolved relationship has been added to our template.

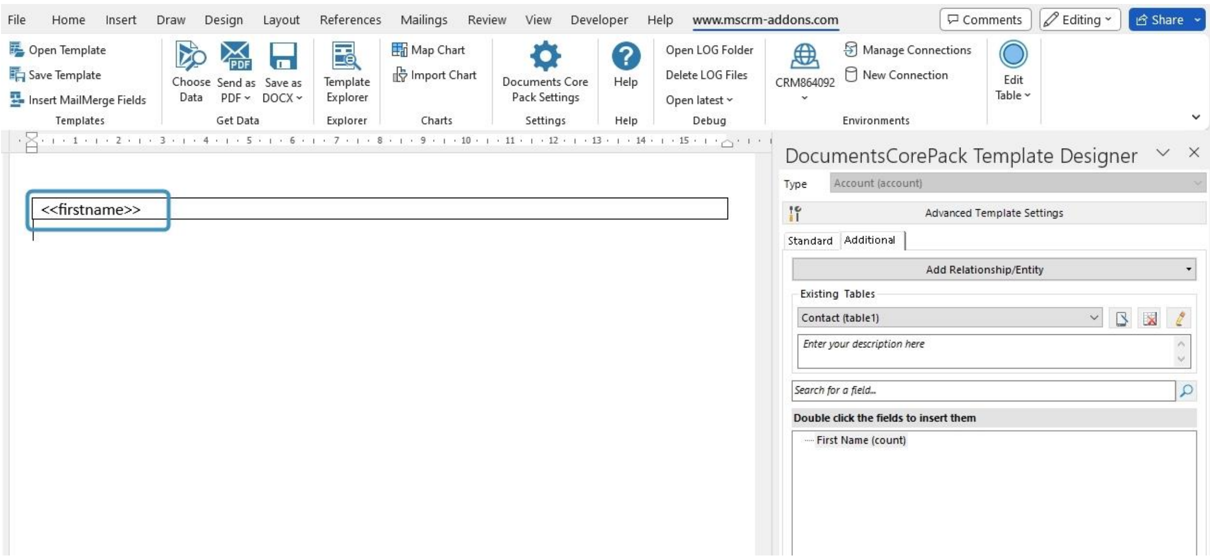


Figure 108: Result

Now make sure to save your template. Then merge it with Dynamics 365 data and test it.

6.9. How to build and format an address block with DocumentsCorePack Template Designer

With the DocumentsCorePack **Field Properties** functionality, users can easily format every address line and define specific line behavior for information, even if it is not stored in Dynamics 365.

Step-by-step description

Step 1: An address block can be easily created with the **DocumentsCorePack Template Designer**. To do this, open Microsoft Word and navigate to the ① **www.mscrm-addons.com** tab. Click on the ② **Insert MailMerge Fields** button and the ③ **DocumentsCorePack Task Pane** opens.

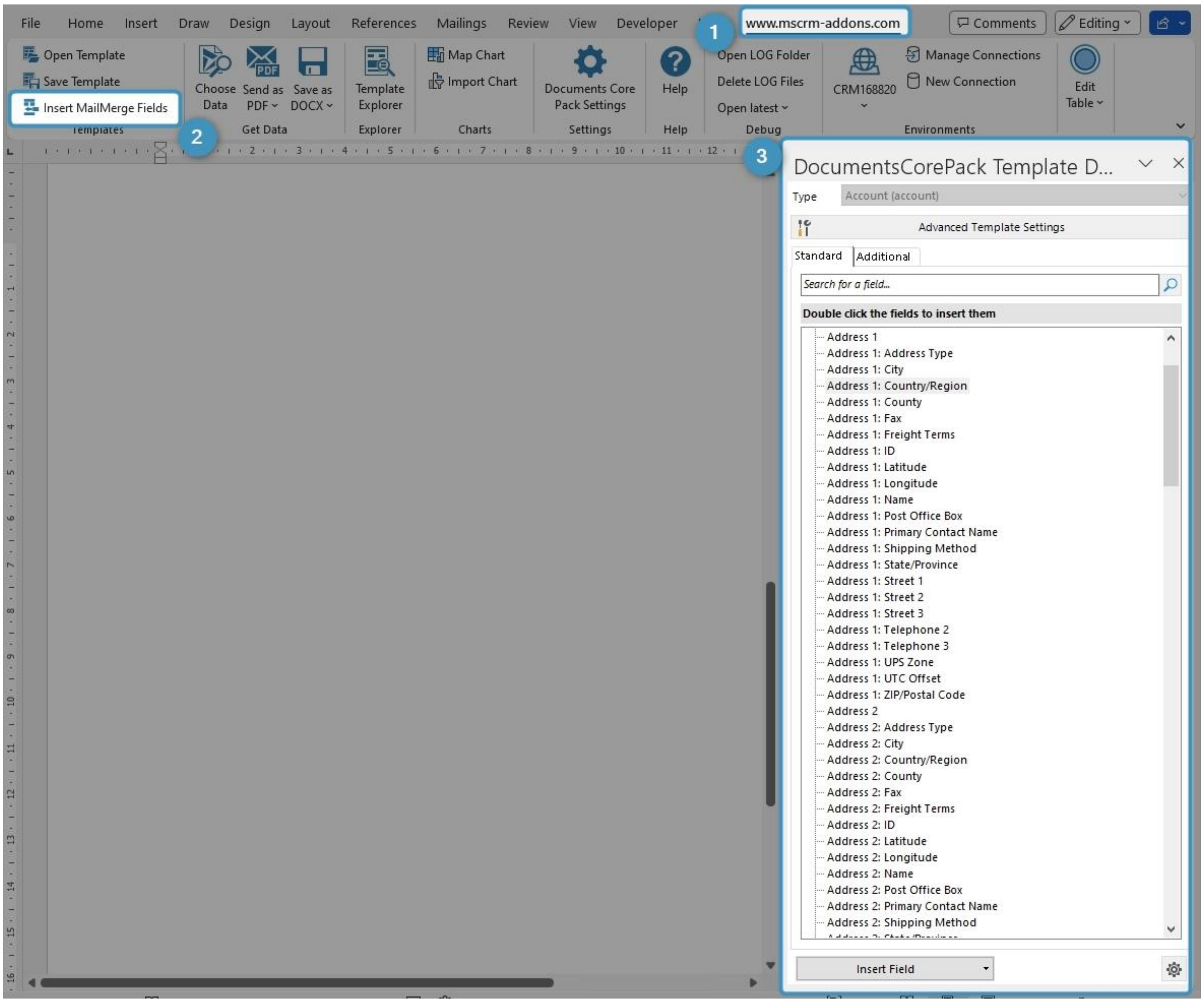


Figure 109: Open DocumentsCorePack Template Designer

Step 2: After selecting the **Entity Type/Table** (it is Account in this example), you can begin inserting the appropriate **MailMerge** Fields into your future address block by double-clicking on the required fields to add them to the document.

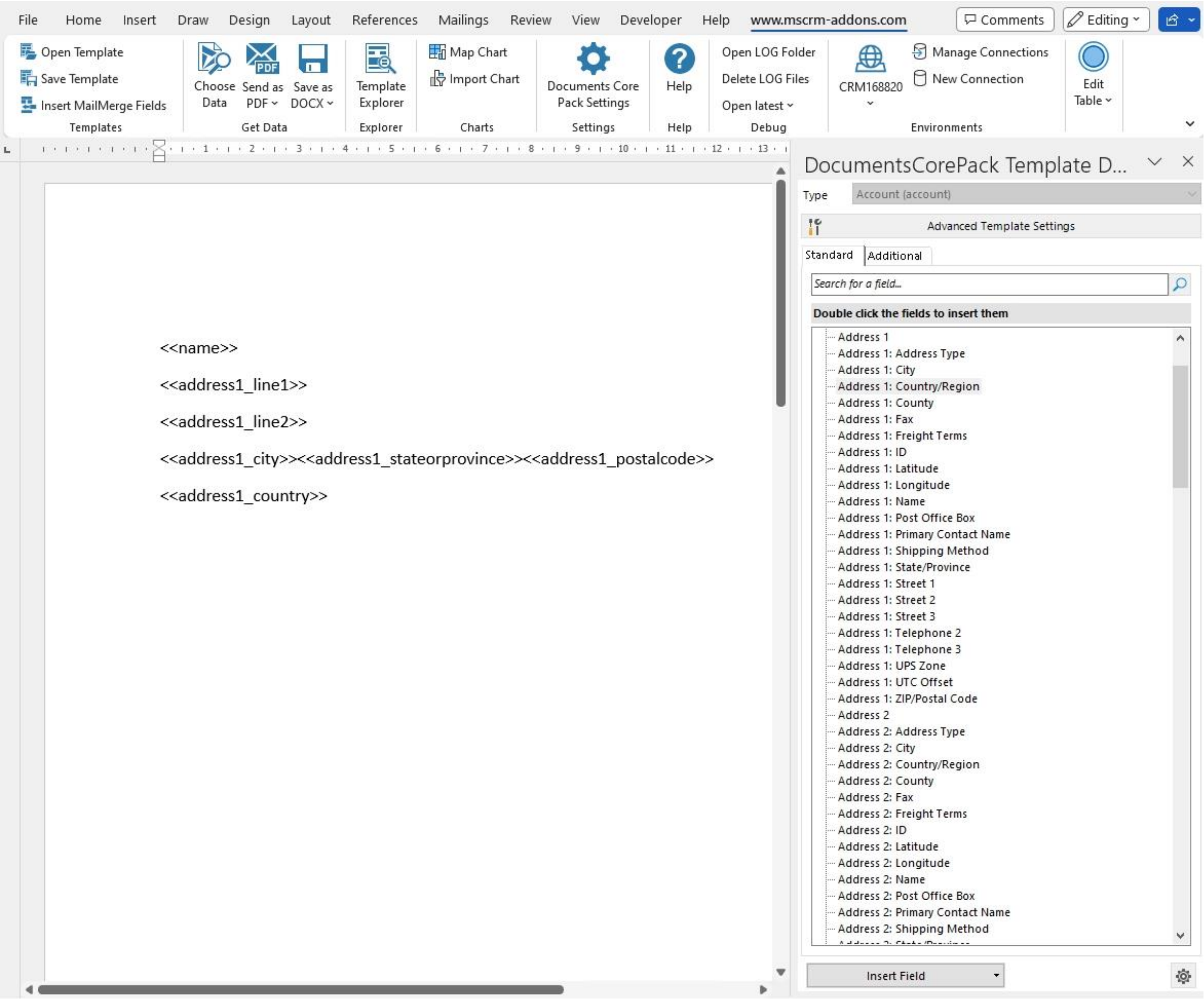


Figure 110: Example Address block

Step 3: In order to save it to your Dynamics 365 click the **Save Template** button in the Word ribbon.

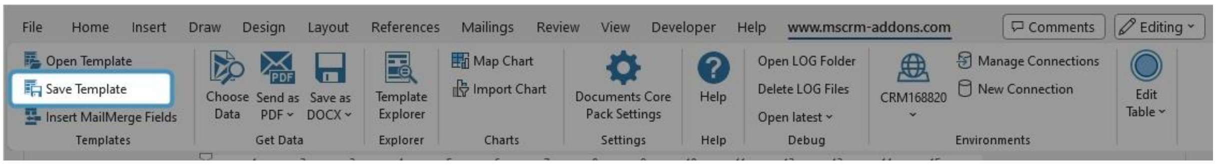


Figure 111: Save template to Dynamics 365

Step 4: This window opens. Define a name for your template and confirm with **Save**.

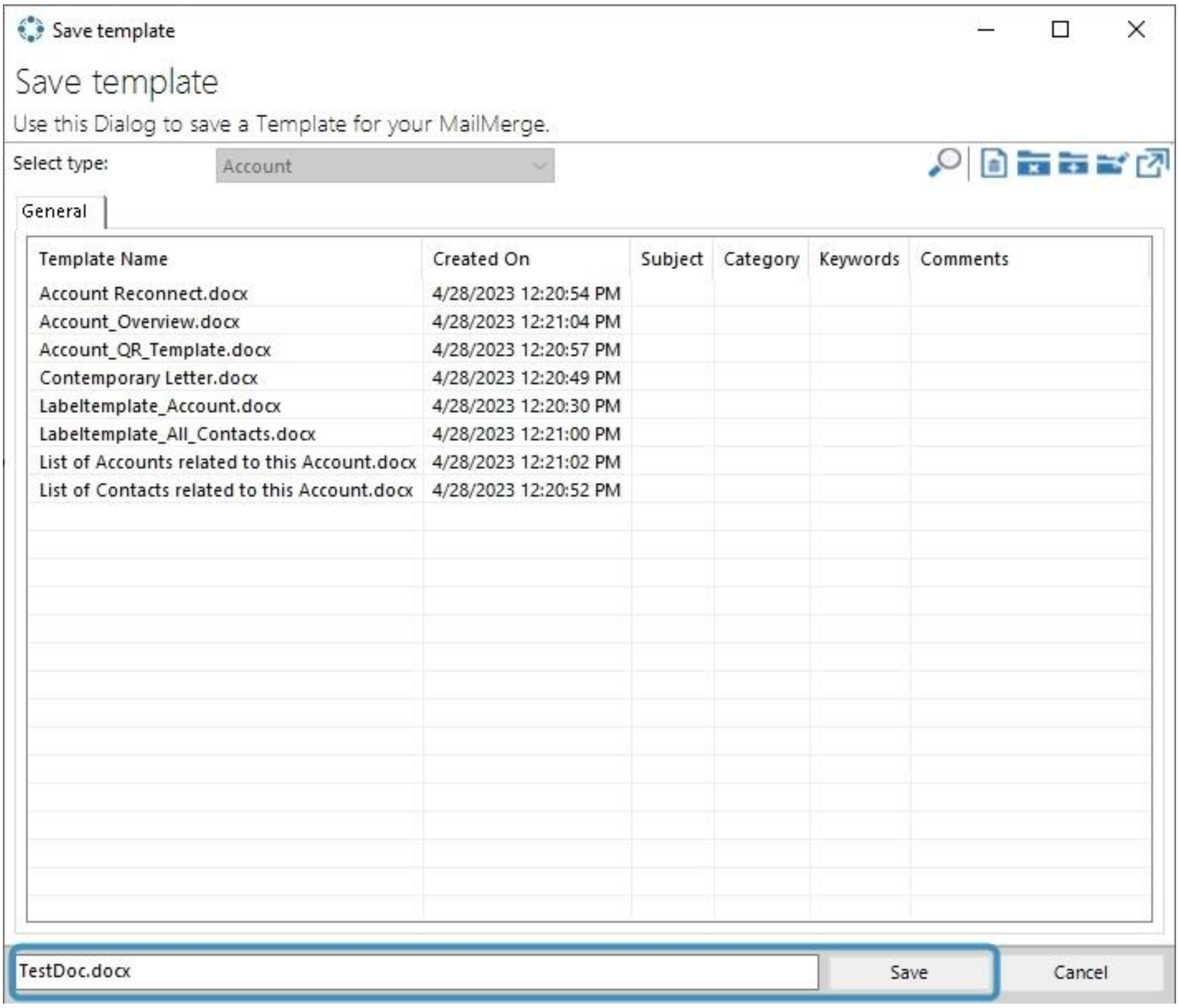


Figure 112: Save template window

Step 5: To select the relevant Data from Dynamics 365, click on the 1 **Choose Data** button. In the **MailMerge** window select the 2 **entity/table** you want your template to merge to and hit the 3 **Search** button. All 4 Dynamics 365 data is loading. Now look for the data you need to merge the template with and confirm with 5 **Select**.

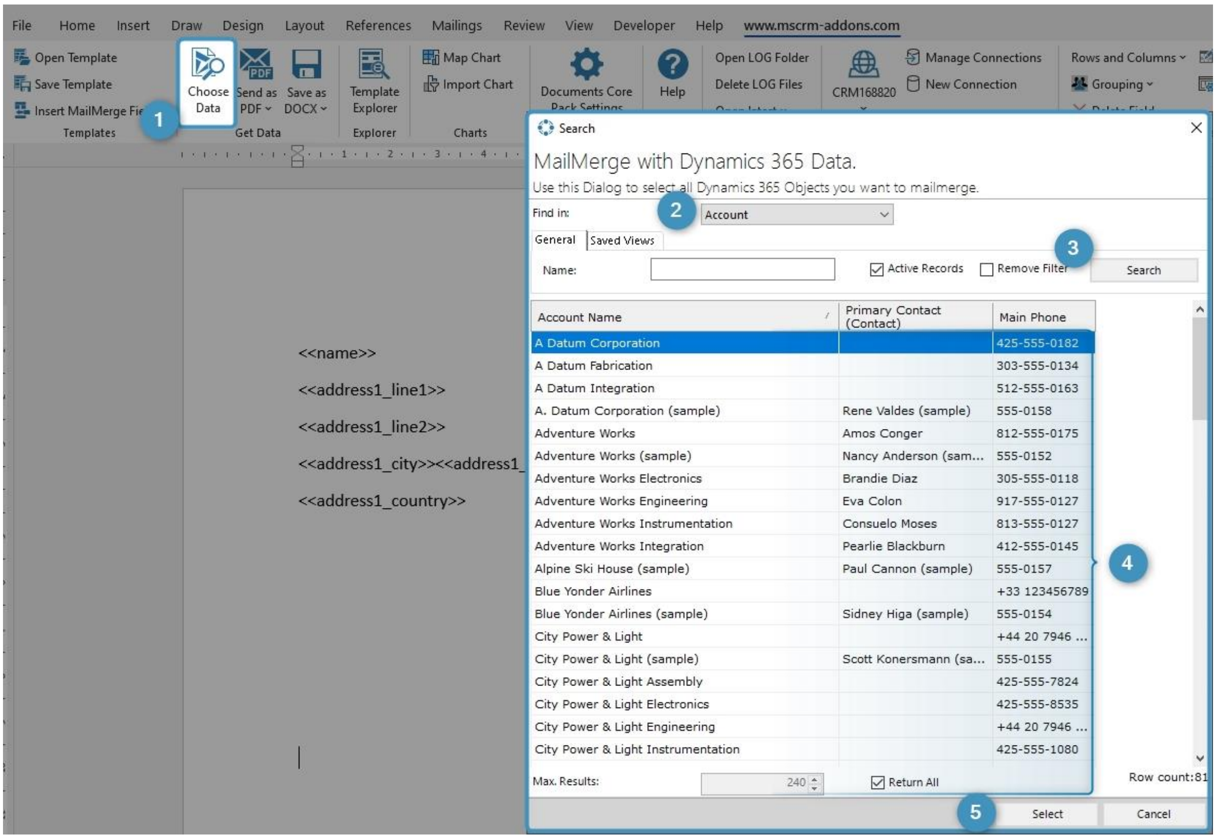


Figure 113: Select Dynmaics 365 data for merging the template

Step 6: After the merge process.

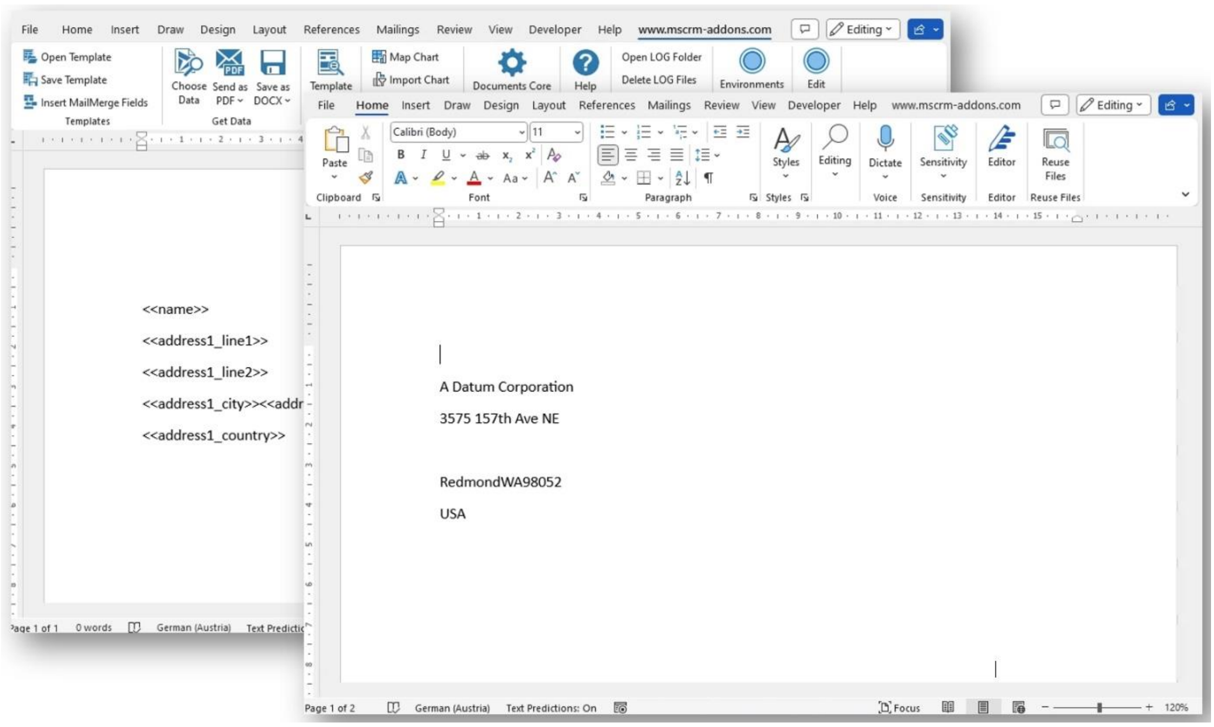


Figure 114: Merged template with empty address line

Step 7: To keep your documents compact, avoiding empty lines within your documents is recommended. For example, think of an address block where some customers use the Address Line 2 field, but others do not. To ensure a compact output, you want to avoid empty lines for those not using the field.

There are two options:

1 **Delete line/row if whole line/row is empty**: If the value of the selected field, as well as all other fields within the same line, are empty in DataVerse, the line will be removed.
2 **Delete line/row if this field is empty**: If the value of the selected field is empty, the whole line is removed independent of other content in the same line.
Place the cursor in the field you want to format. Click on the 3 **Field properties** to open the options.

If the value of the selected field and all other fields within the same row in DataVerse are empty, take Option 1.

If you need the whole line removed when only one selected field is empty, take Option 2.

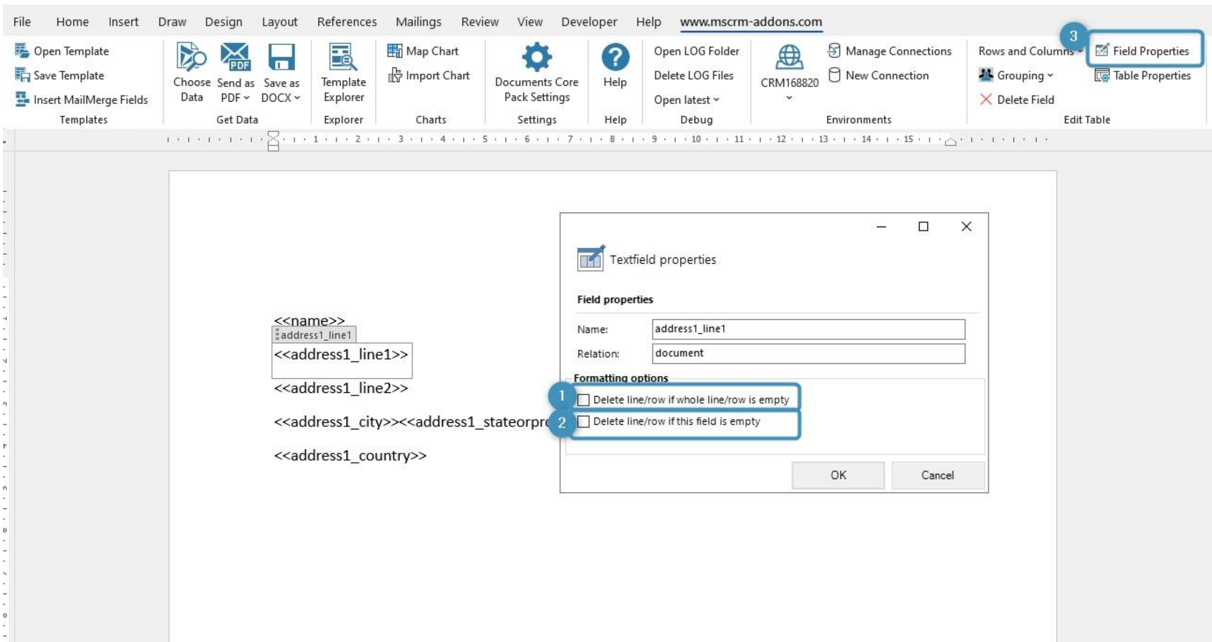


Figure 115: Field properties

6.10. How to Insert as Picture Field

Learn here how to insert a picture in your DocumentsCorePack TemplateDesigner via Dynamics 365 image field. This field allows you to associate an image or picture with a record in an entity. This feature is particularly useful for visually identifying records and providing additional context.

Preparation: Before you insert a picture field, you must first save a picture in the image field of Dynamics 365. If an image field is not available, learn here how to add an image field to your Dynamics 365.

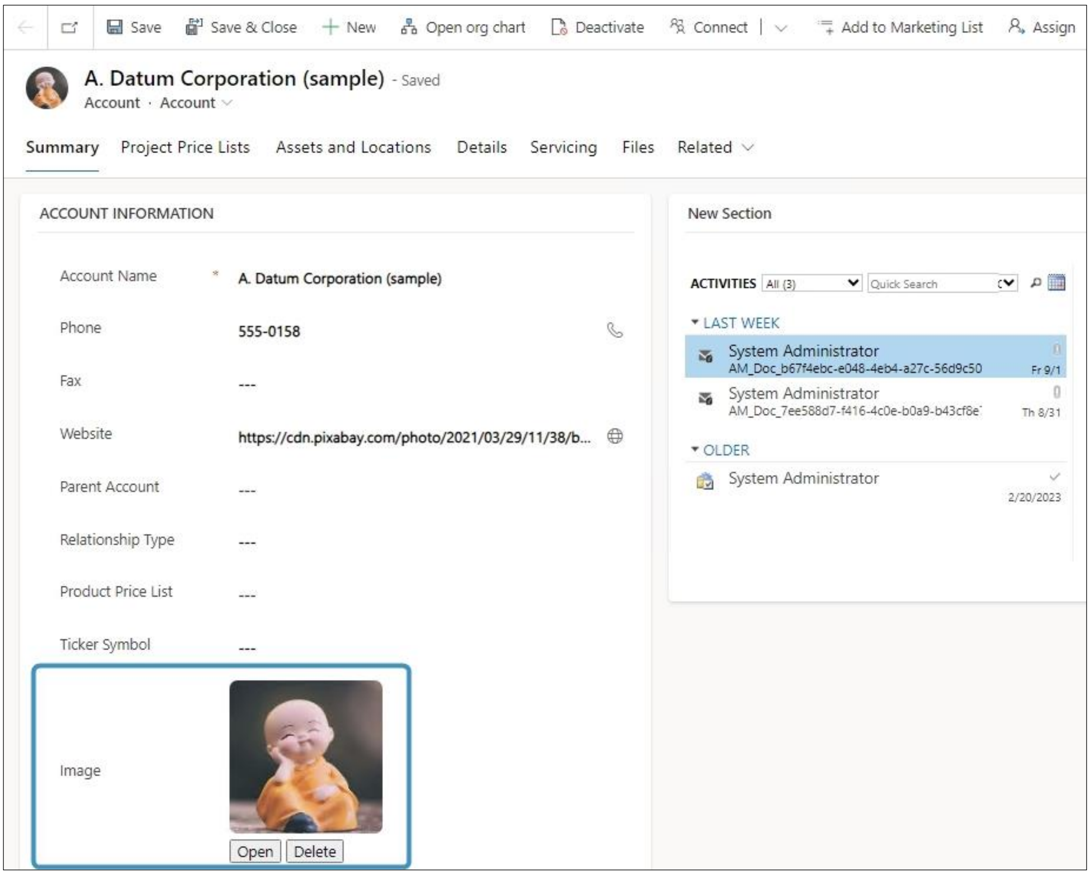


Figure 116: Saved picture in image field

Now open the DocumentsCorePack Template Designer in your Dynamics 365 and:

❶ Navigate to the standard tab and look for the location in which you have previously saved the picture.
❷ Select the **Type** (in this example it is stored in the **Account** entity). The tree-view should be visible from the moment you open the Standard tab. If you do not find your field immediately, use the scroll bar to look for the corresponding fields or search for it in the search field.
❸ The field in this example is **Image**. Click on it.
❹ If you want to insert the **Image** as a Picture Field, open the **Insert Field** drop-down selection, and select **Insert Image as Picture field**.

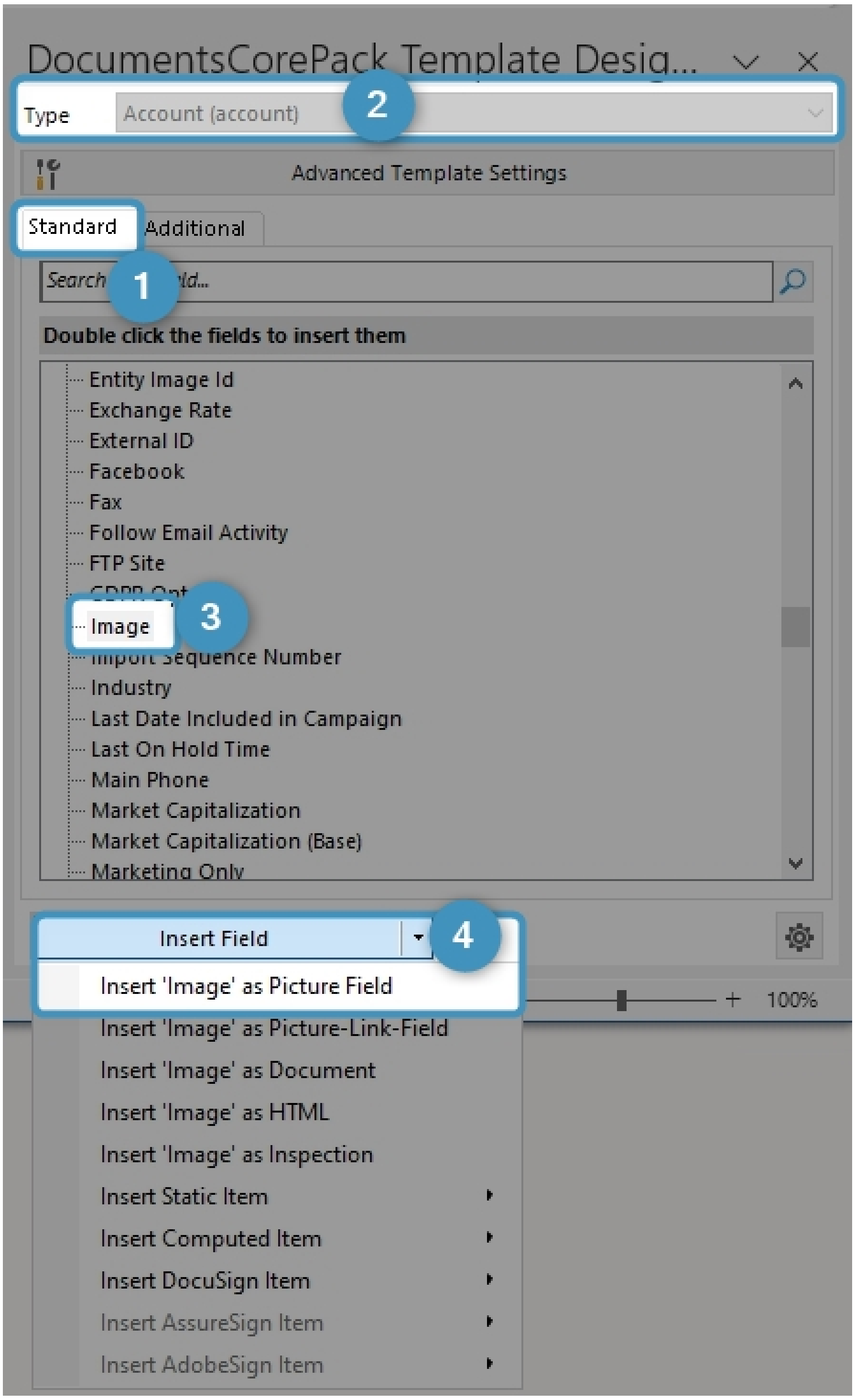


Figure 117: Insert Field - Insert Image as Picture Field

A placeholder will then appear in your document.

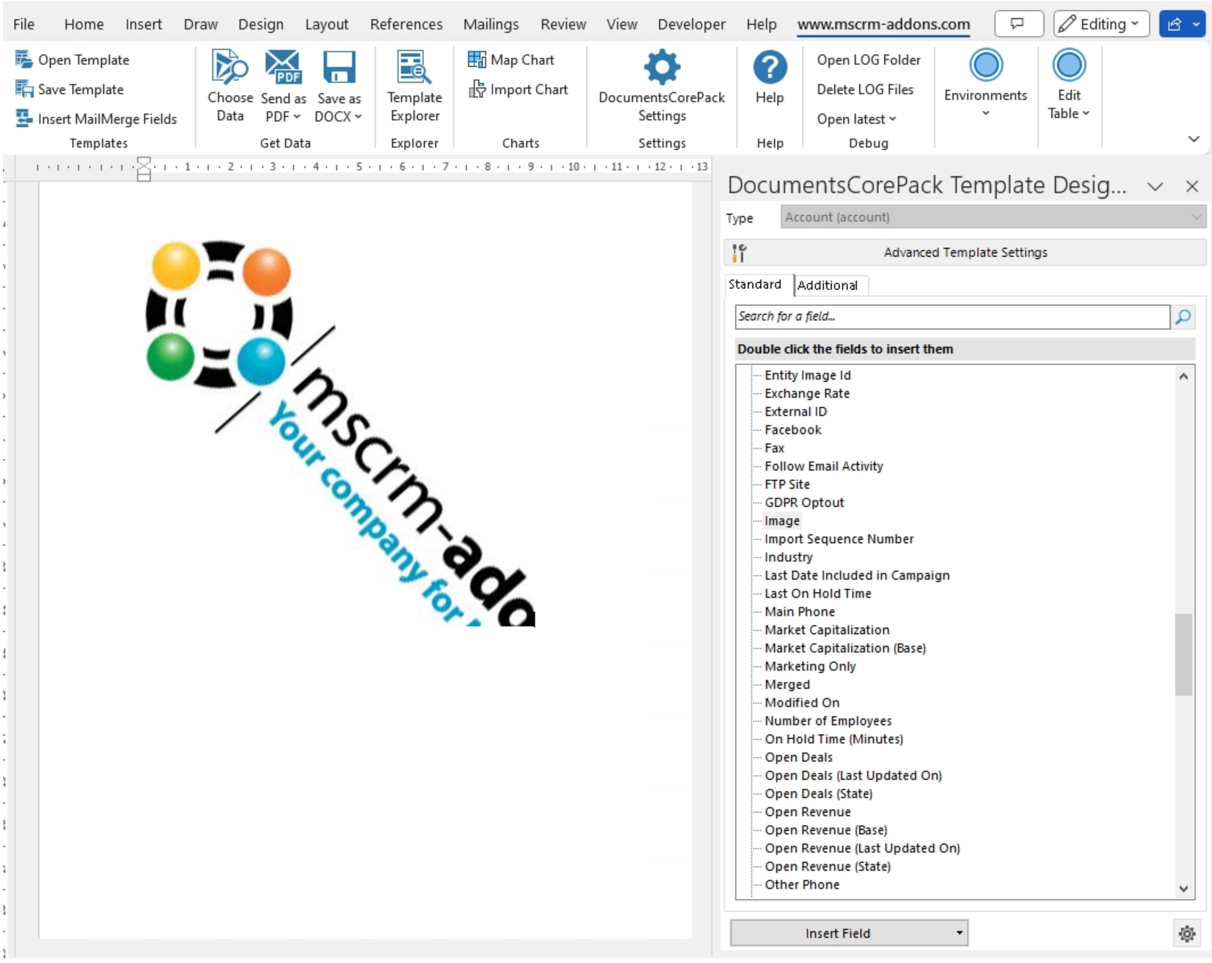


Figure 118: Placeholder

If you merge this template, DocumentsCorePack will resolve the field to your picture and insert it into the document.

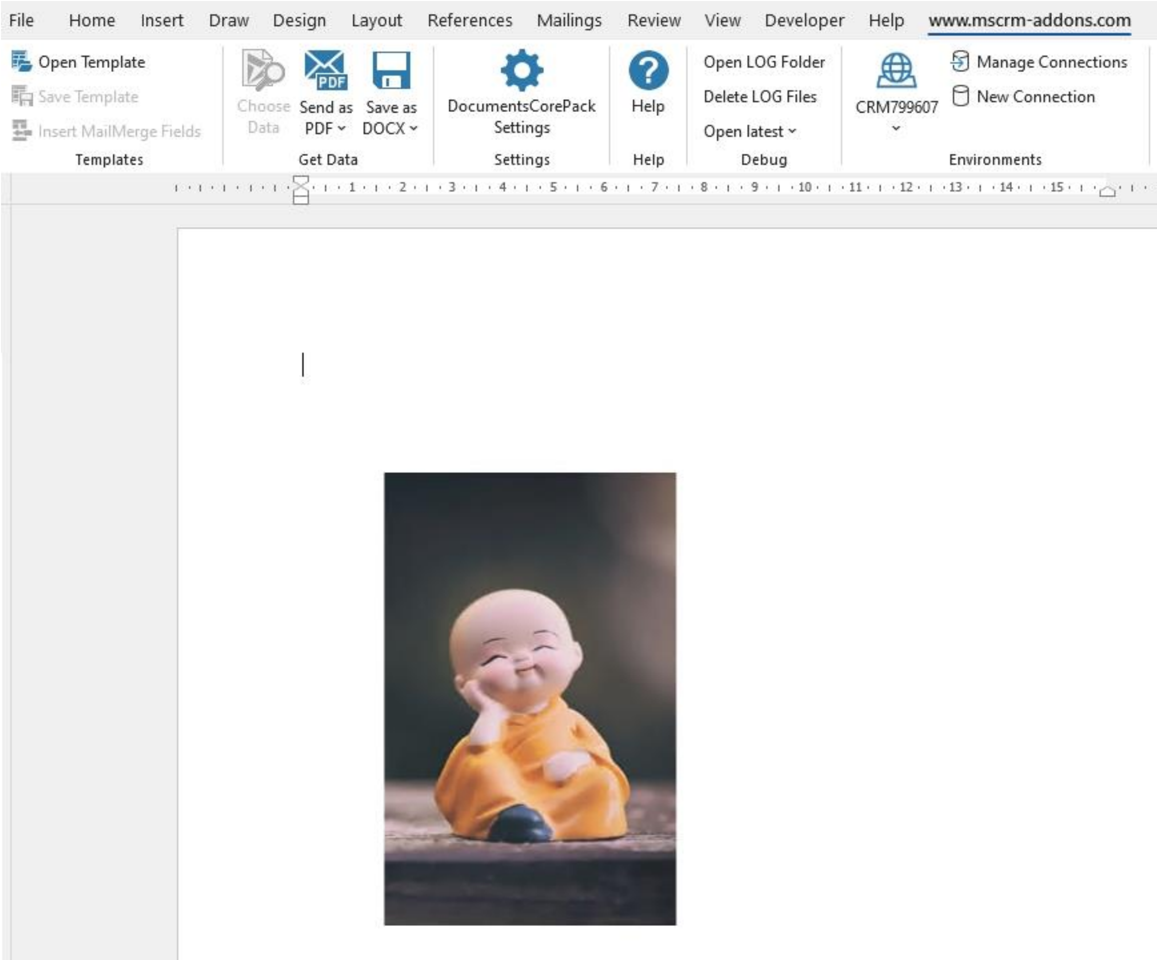


Figure 119: Result

6.11. How to use the "Insert as picture Field" functionality to save a picture as a note

To follow this step-by-step description, an image must first be stored in the **notes** section of your Dynamics 365 record.

Step-by-step description

Step 1: Open a Word Document in your Dynamics 365 and navigate to 1 www.mscrm-addons.com. Press the 2 **Insert MailMerge Fields** button to open the DocumentsCorePack Template Designer. Go to the 3 **Additional** tab and click on the 4 **Add Relationship/Entity/table** button.

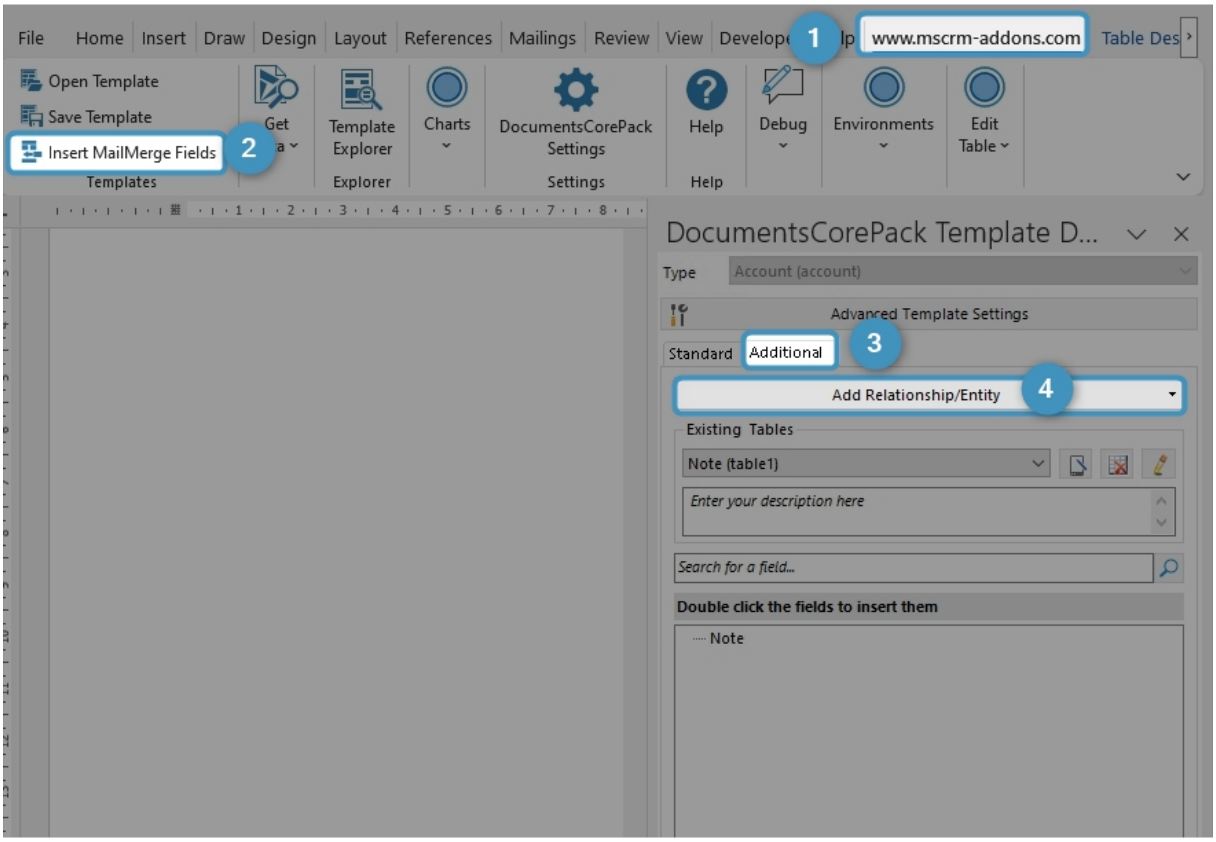


Figure 120: Add a relationsship/entity in the Additional tab

Step 2: The ① **Configure Fields and Datasource** window is shown. Open the drop-down menu and select ② **Account** > **Note [objectId]**.

Please note: If you have saved your picture somewhere else, please use the corresponding term.

You will notice that the attributes corresponding to the previously selected relationship are now displayed in the ③ **Attributes** section. Because we have created a note for our example, we check the checkbox next to ④ **Note**. Depending on the location in which you have previously stored your picture, you could use any other display name. Click ⑤ **OK** to proceed.

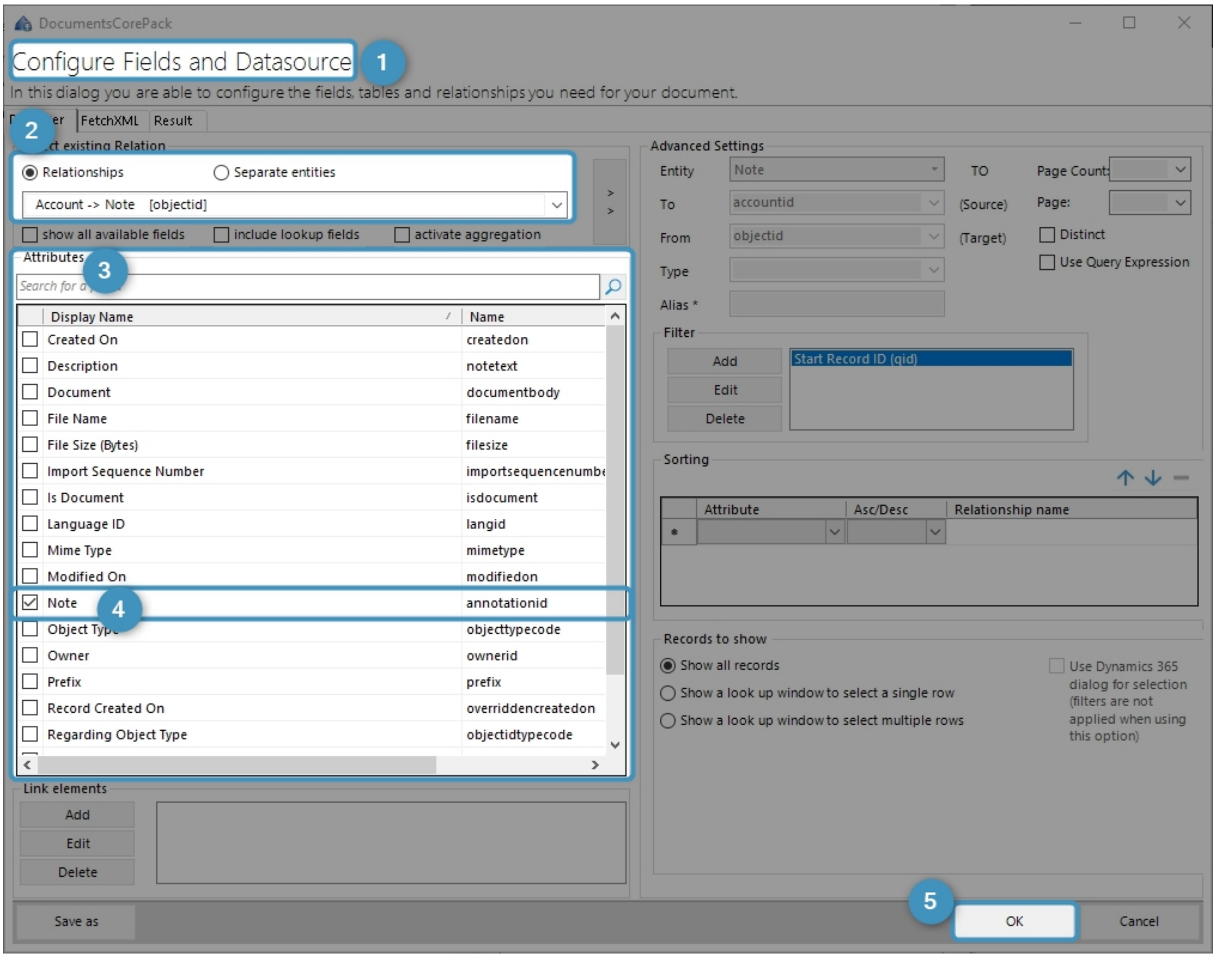


Figure 121: Configure Fields and Datasource-dialog

Step 3: The DocumentsCorePack Template Designer shows the created note.

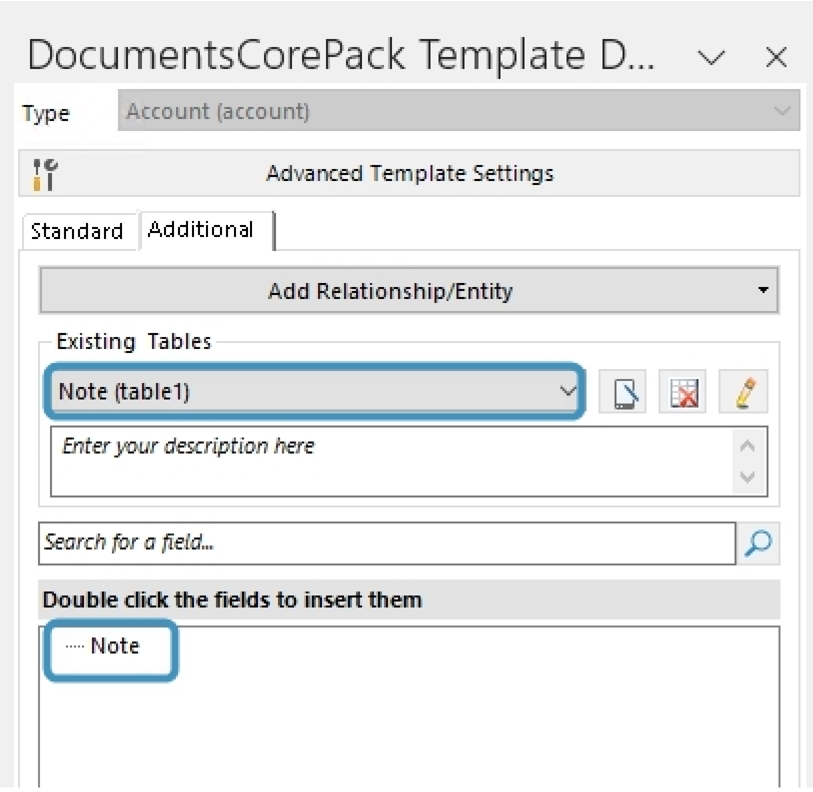


Figure 122: Added Entity in Template Designer

Step 4: If you want to insert the note, select **Insert Note as Picture Field** in the drop-down menu of the **Insert Field** button. A placeholder will appear in the document.

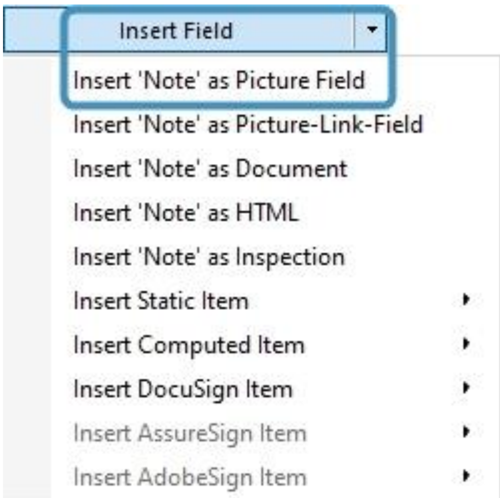


Figure 123: Insert Field button

Step 5: You will be asked how the table should appear. Just click **OK** to continue.

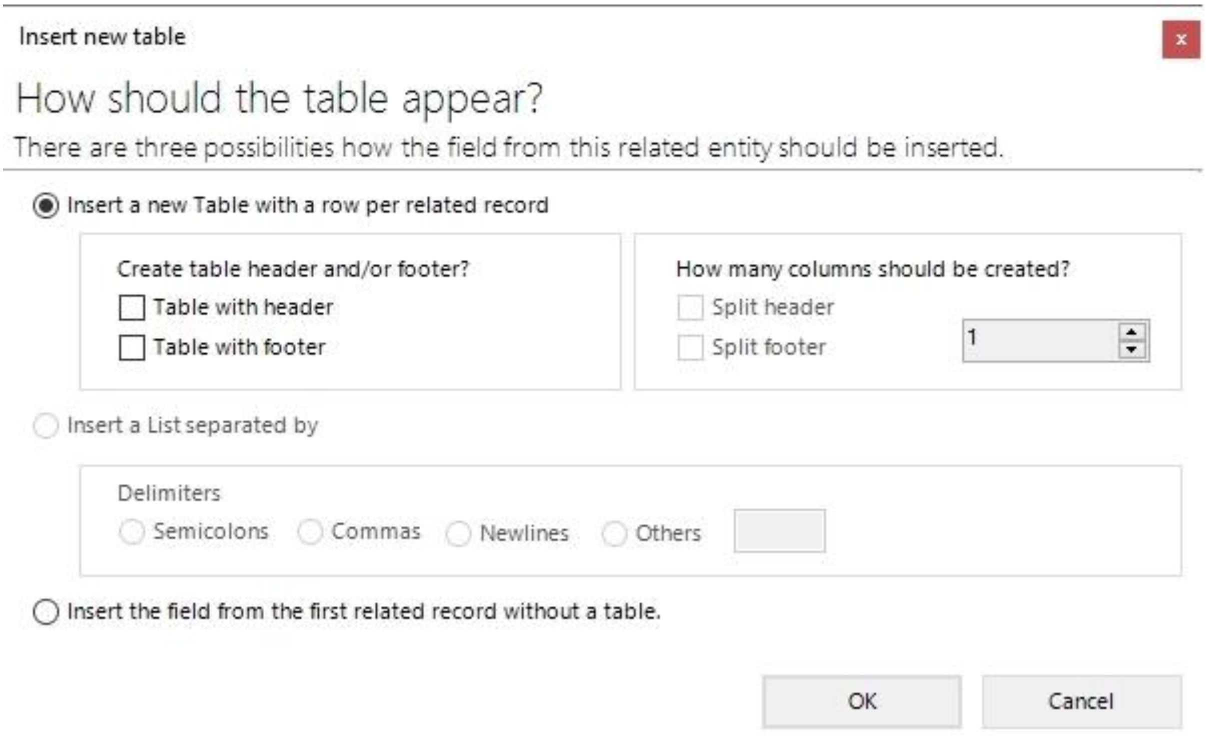


Figure 124: How should the table appear-dialog

Step 6: When you insert a placeholder into your document and then merge it with your data in Dynamics 365, the intended picture will be displayed seamlessly.

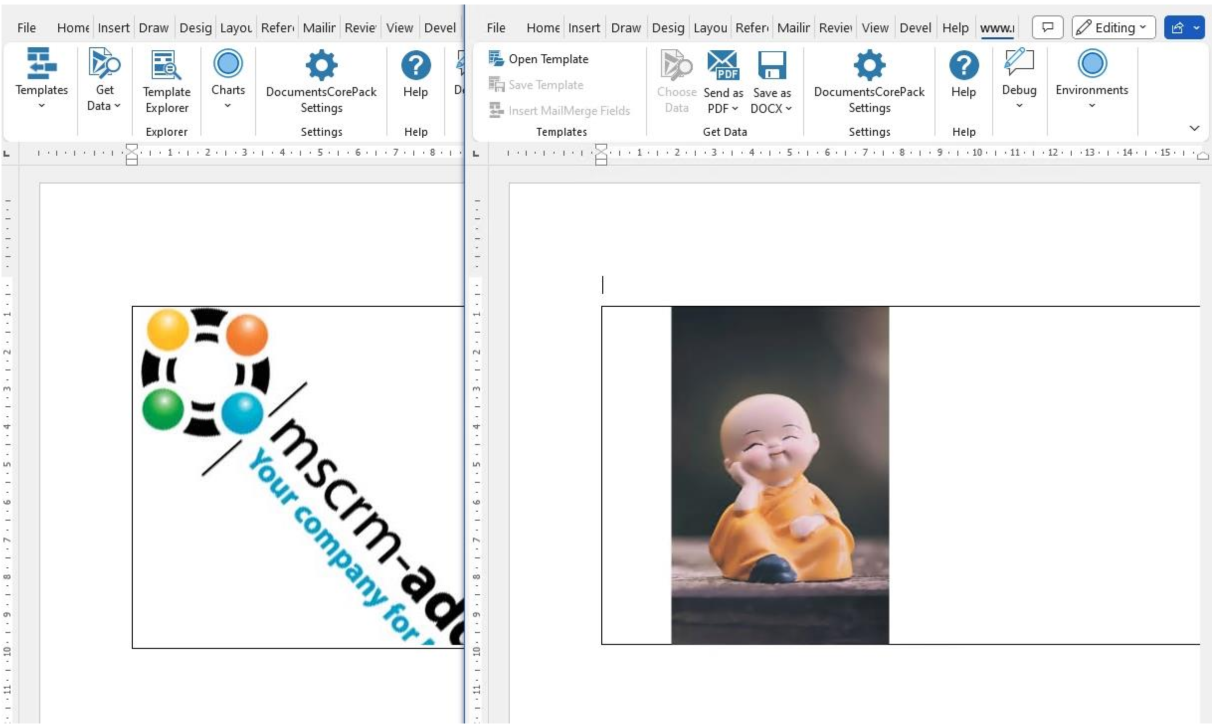


Figure 125: Left: Placeholder, right: result

6.12. How to Insert a Picture Link Field

Select this option if you want to create a document containing many pictures. Due to the functionality of this **Insert As** option, the resulting document's size will be smaller than the size of a document that had its pictures directly inserted. This option is useful if you use pictures in your document that are subject to seasonal changes. Do not use this option if you know that the recipient has bad or no internet connection.

Prerequisites: Before inserting a field as a picture link field, you must save at least one link to a specific picture in a random text field in your Dynamics 365. Once you have saved at least one picture link, you can start.

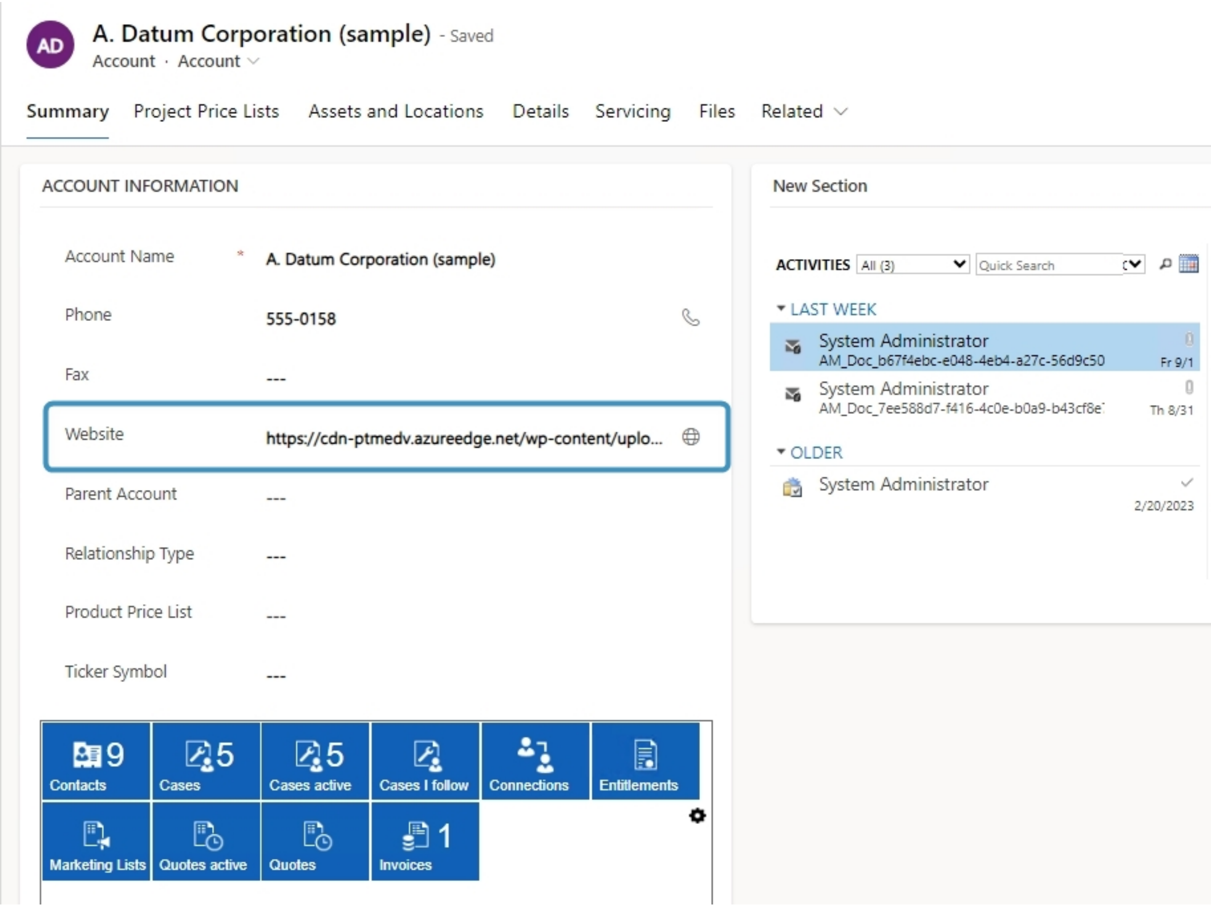


Figure 126: Add a link as picture link to the description field

Step-by-step description

Step 1: Open a template or create a new one by clicking on the 1 **www.mscrm-addons.com** tab, selecting 2 **Insert MailMerge Fields** to get to the 3 **DocumentsCorePack Task Pane**.

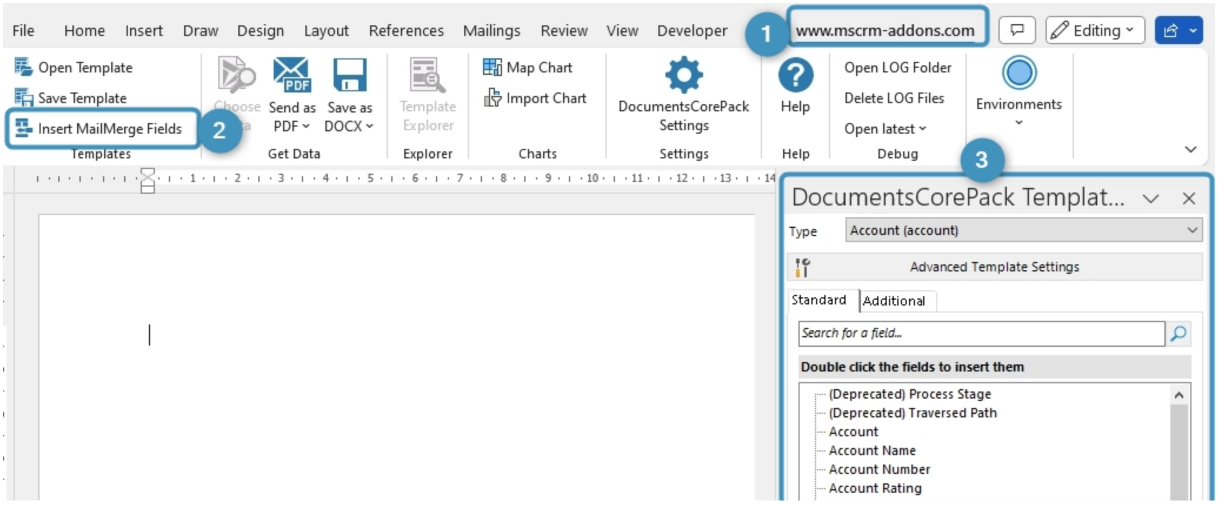


Figure 127: Open the DocumentsCorePack Task Pane

Step 2: Select the type and the field to be inserted. In this example, we selected **Account** as the Type and **Website** as the Dynamics 365 field.

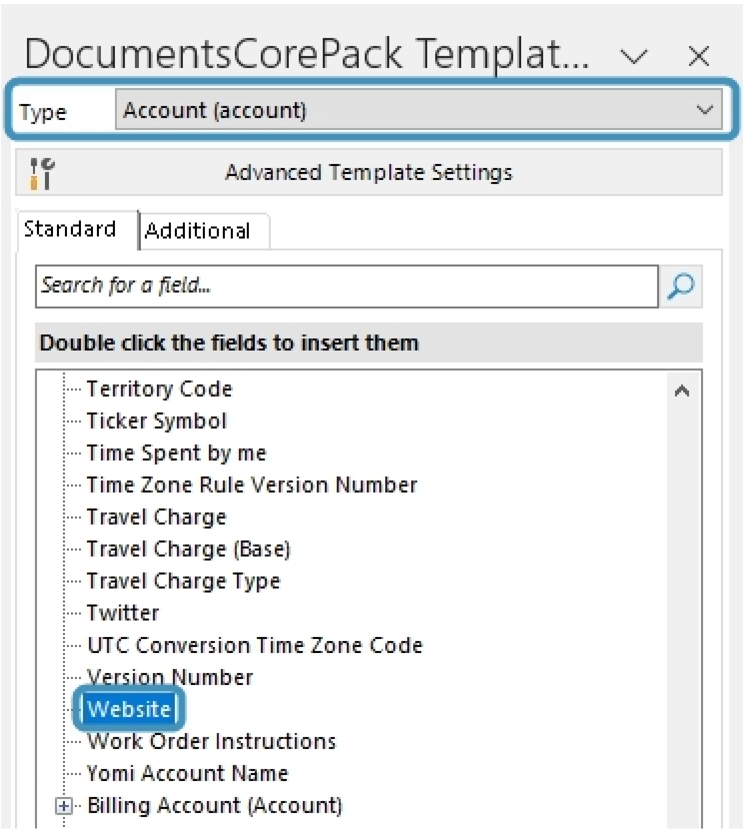


Figure 128: Select Type and field to be inserted

Step 3: Open via the **Insert Field** button the drop-down selection and choose the **Insert Website as Picture-Link-Field**.

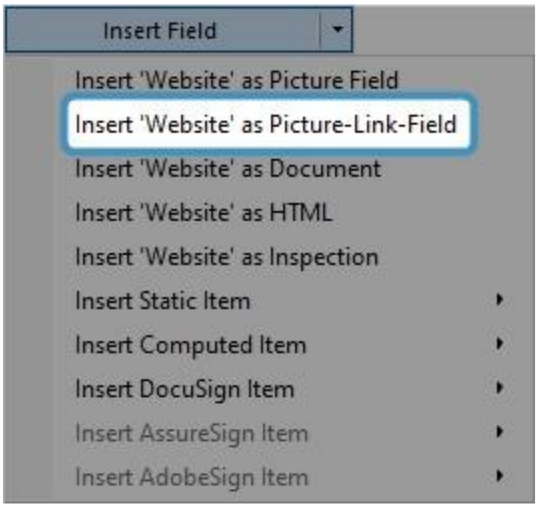


Figure 129: Insert as Picture-Link-Field

Step 4: A Placeholder appears.

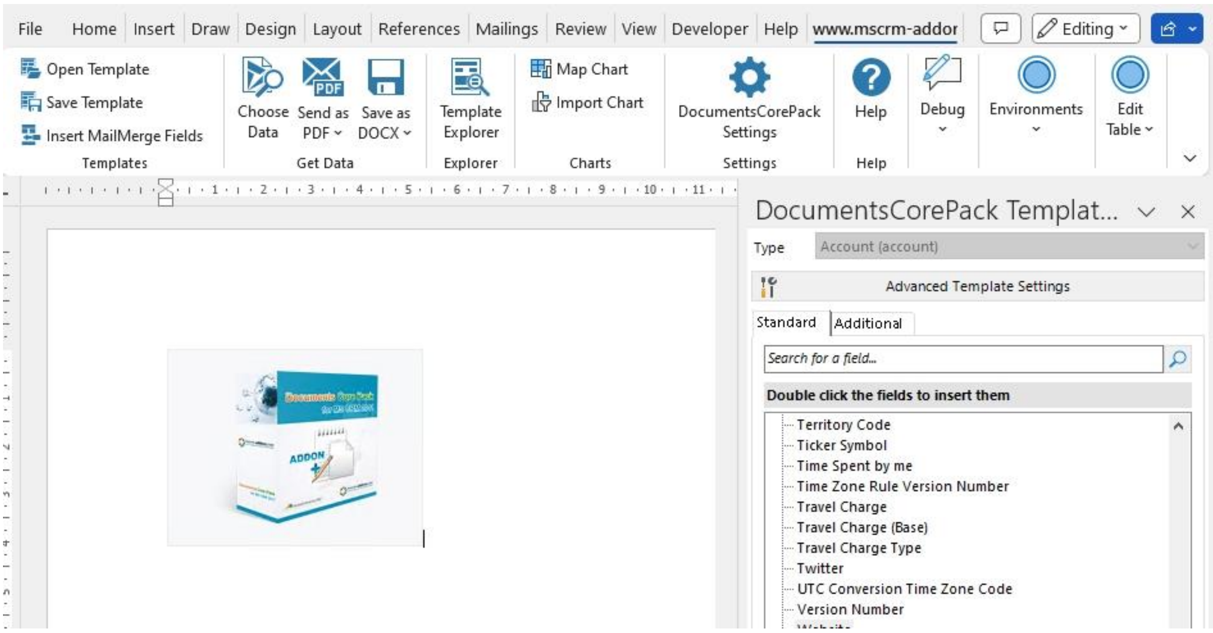


Figure 130: Placeholder

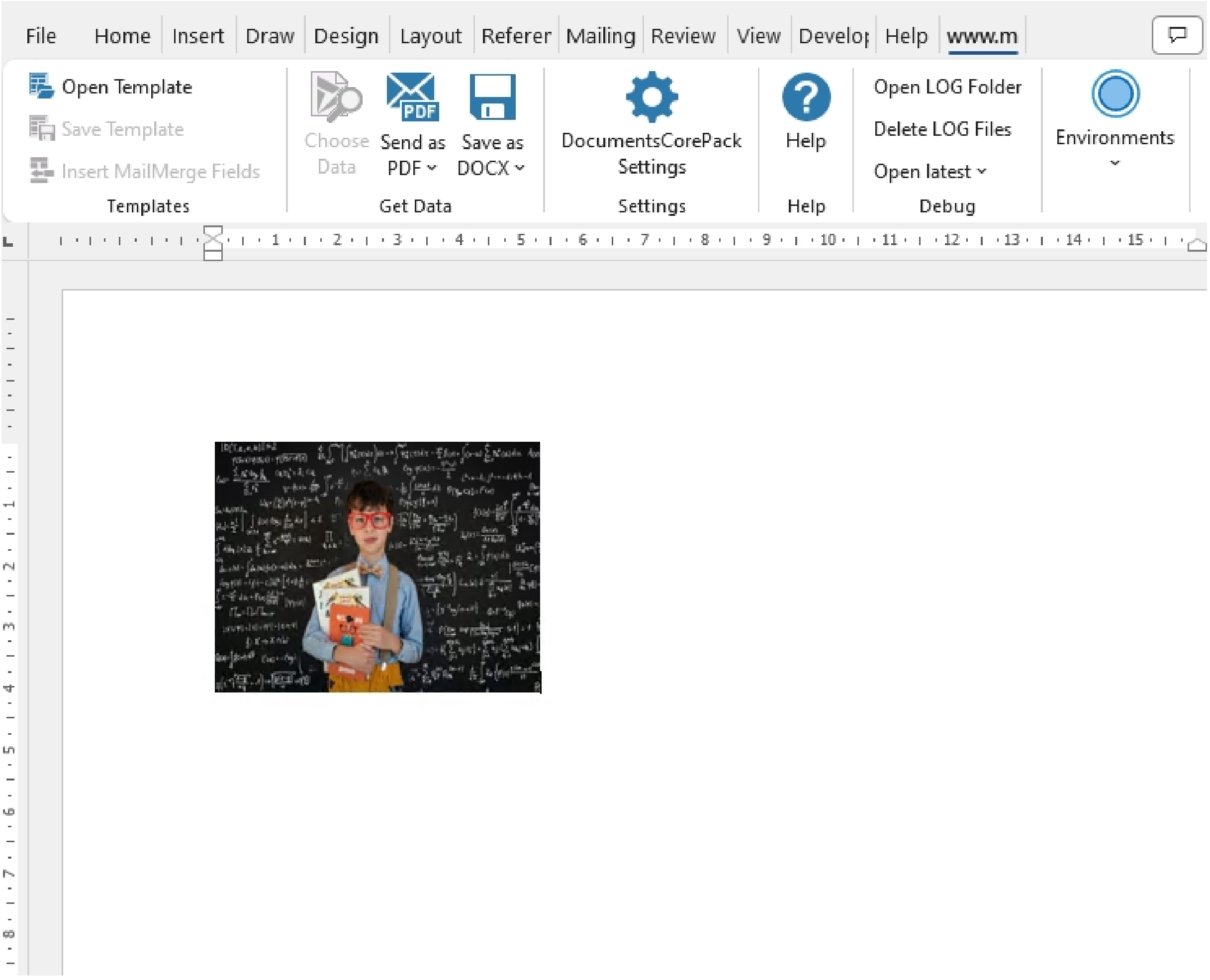


Figure 131: Result

6.13. The "Insert as Document" option in DocumentsCorePack Templates

This feature allows you to insert a document that is stored as a note in your Dynamics 365.

First, a static document must be created. In the following example a document about terms and conditions is inserted via the **Insert as a document** function in Dynamics 365.

Step-by-step description

Step 1: In the note section, click on the paperclip to start uploading your file in your Dynamics 365.

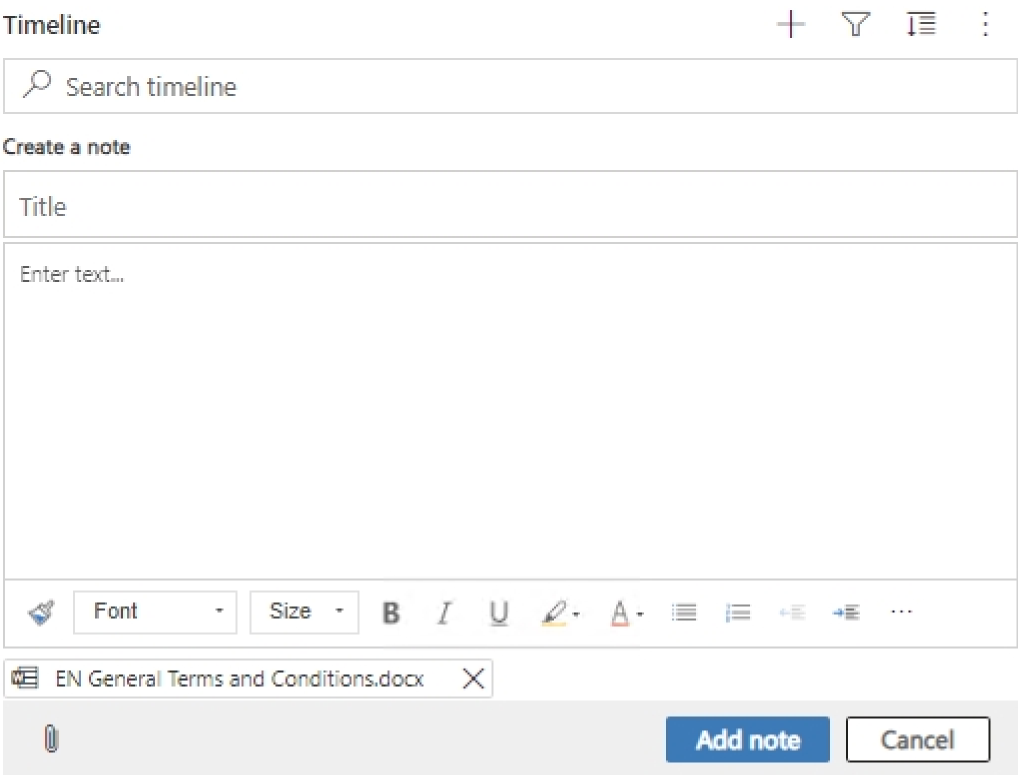
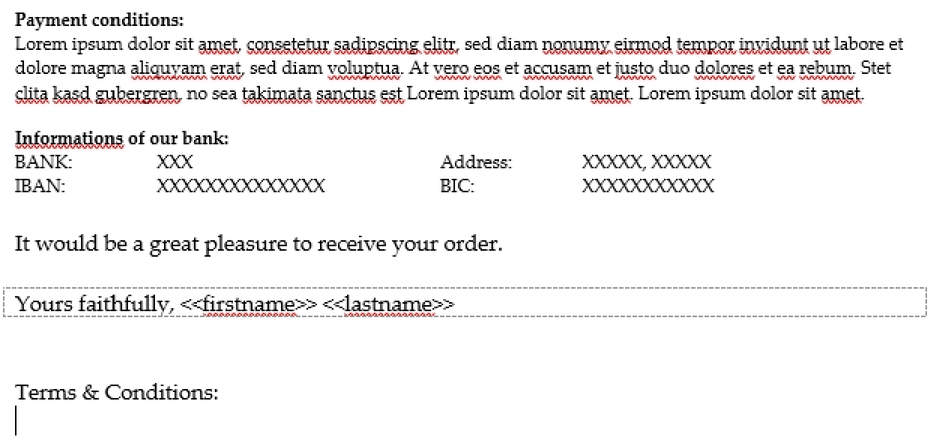


Figure 132: Upload a file to Dynamics 365

Step 2: Now navigate to your DocumentsCorePack Template Designer and open the template you want to insert in the other document.

In the example below, Terms and Conditions should be added to a quote.


Payment conditions:
Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet.

Informations of our bank:

BANK:	XXX	Address:	XXXXX, XXXXX
IBAN:	XXXXXXXXXXXXXX	BIC:	XXXXXXXXXXX

It would be a great pleasure to receive your order.

Yours faithfully, <<firstname>> <<lastname>>

Terms & Conditions:

Figure 133: this is an example of adding Terms and Cond. to a Quote

Step 3: Set up a relationship between your entity and the document's save location. First open The DocumentsCorePack Template Designer and place the 1 cursor where you want to have your document inserted. Select the 2 Note field and 3 Insert Note as Document.

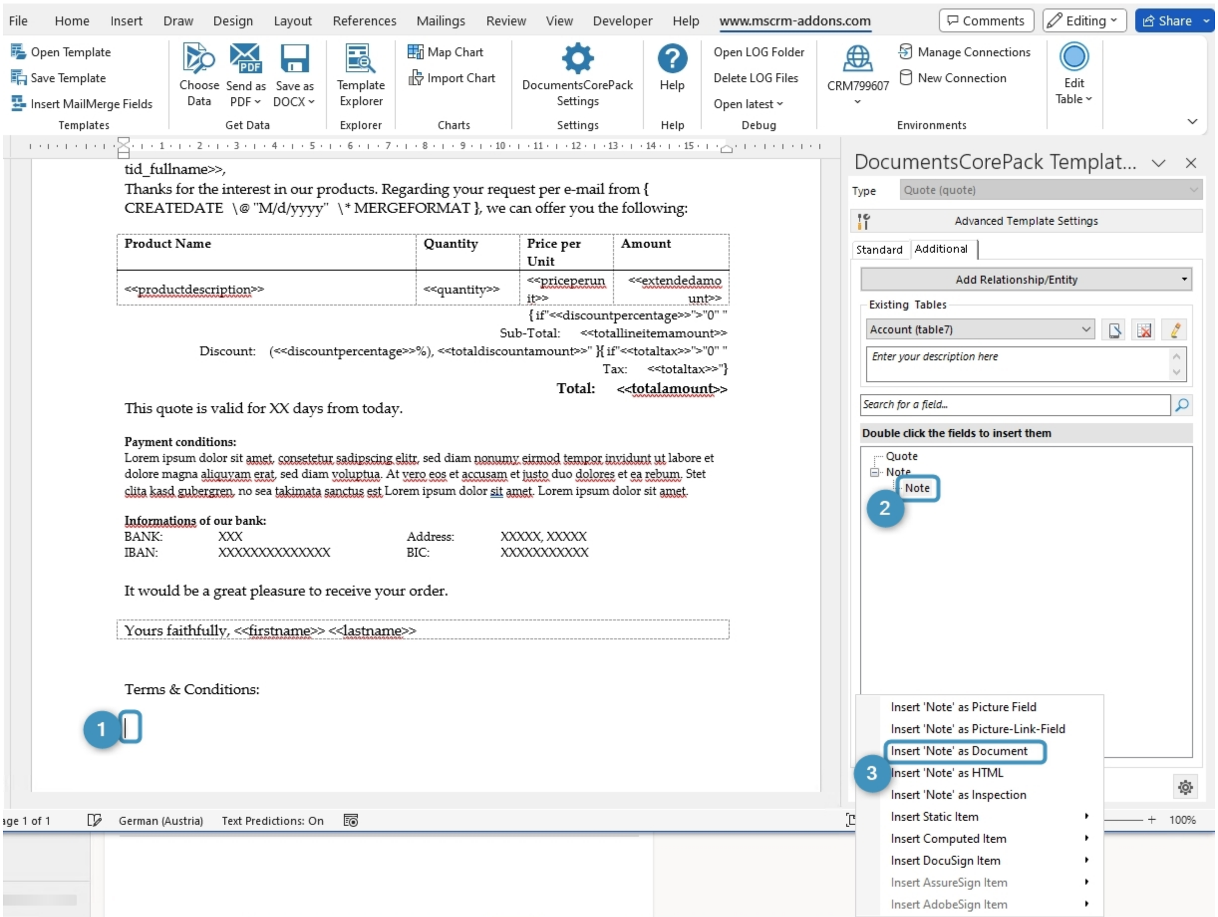


Figure 134: Set up a relationship

Step 4: This window opens. Press **OK** to continue.

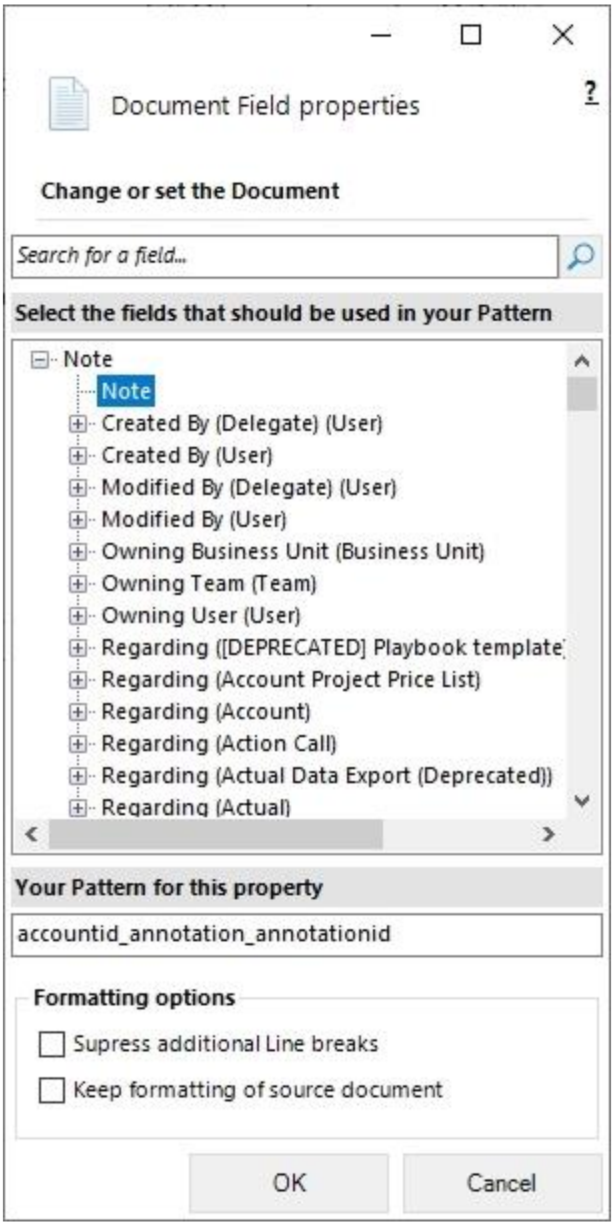


Figure 135: Field properties - insert Note as source field

Step 5: The next dialog allows you to decide whether or not you want to insert the newly generated relation field as a table.

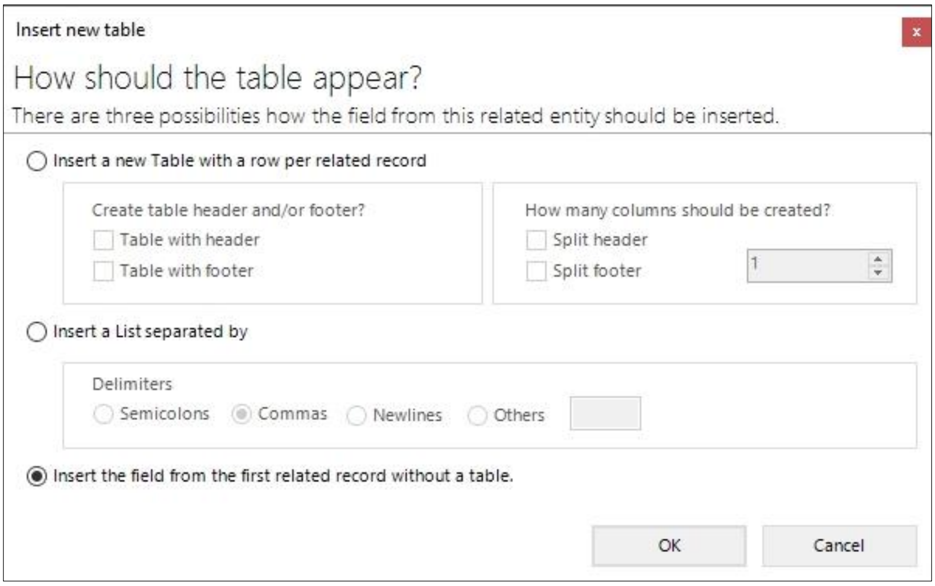
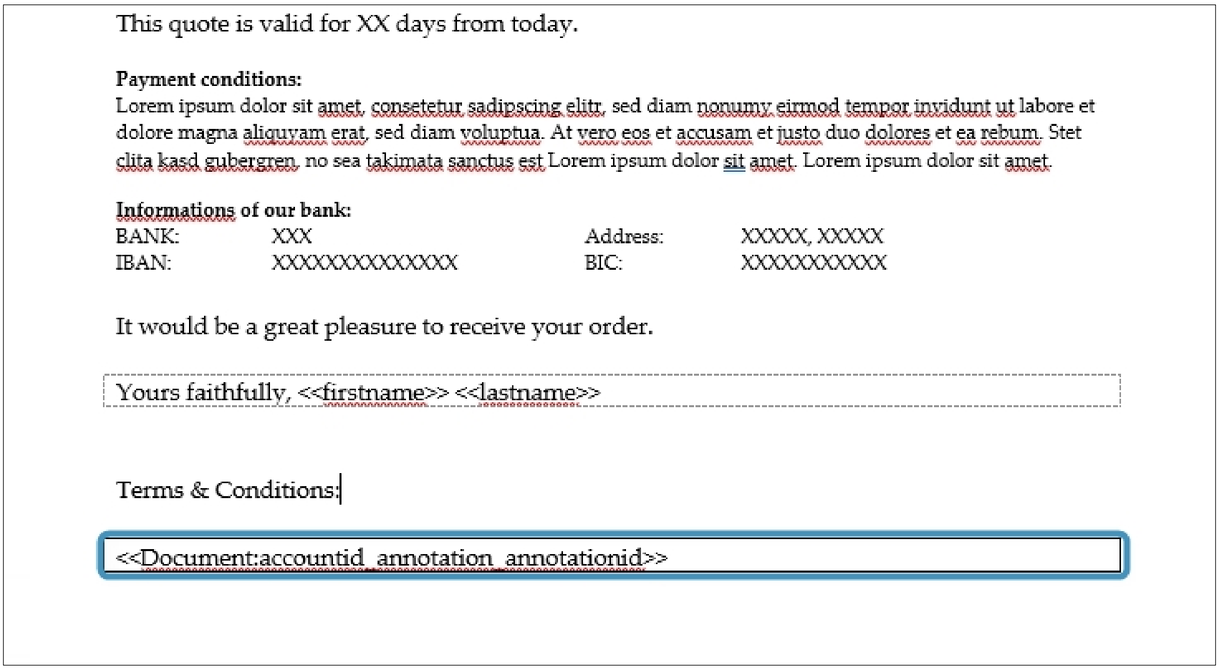


Figure 136: Insert Document as table

Step 6: Successfully inserted pattern (highlighted).


This quote is valid for XX days from today.

Payment conditions:
Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet.

Informations of our bank:

BANK:	XXX	Address:	XXXXX, XXXXX
IBAN:	XXXXXXXXXXXXXX	BIC:	XXXXXXXXXXX

It would be a great pleasure to receive your order.

Yours faithfully, <<firstname>> <<lastname>>

Terms & Conditions:

<<Document:accountid_annotation_annotationid>>

Figure 137: Successfully inserted pattern

Step 7: Use the **Save Template** option to publish it to Dynamics 365.

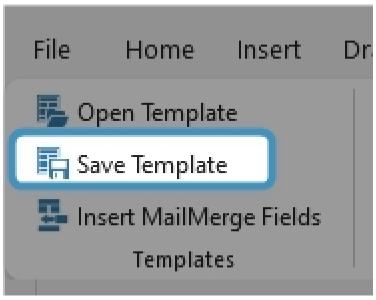
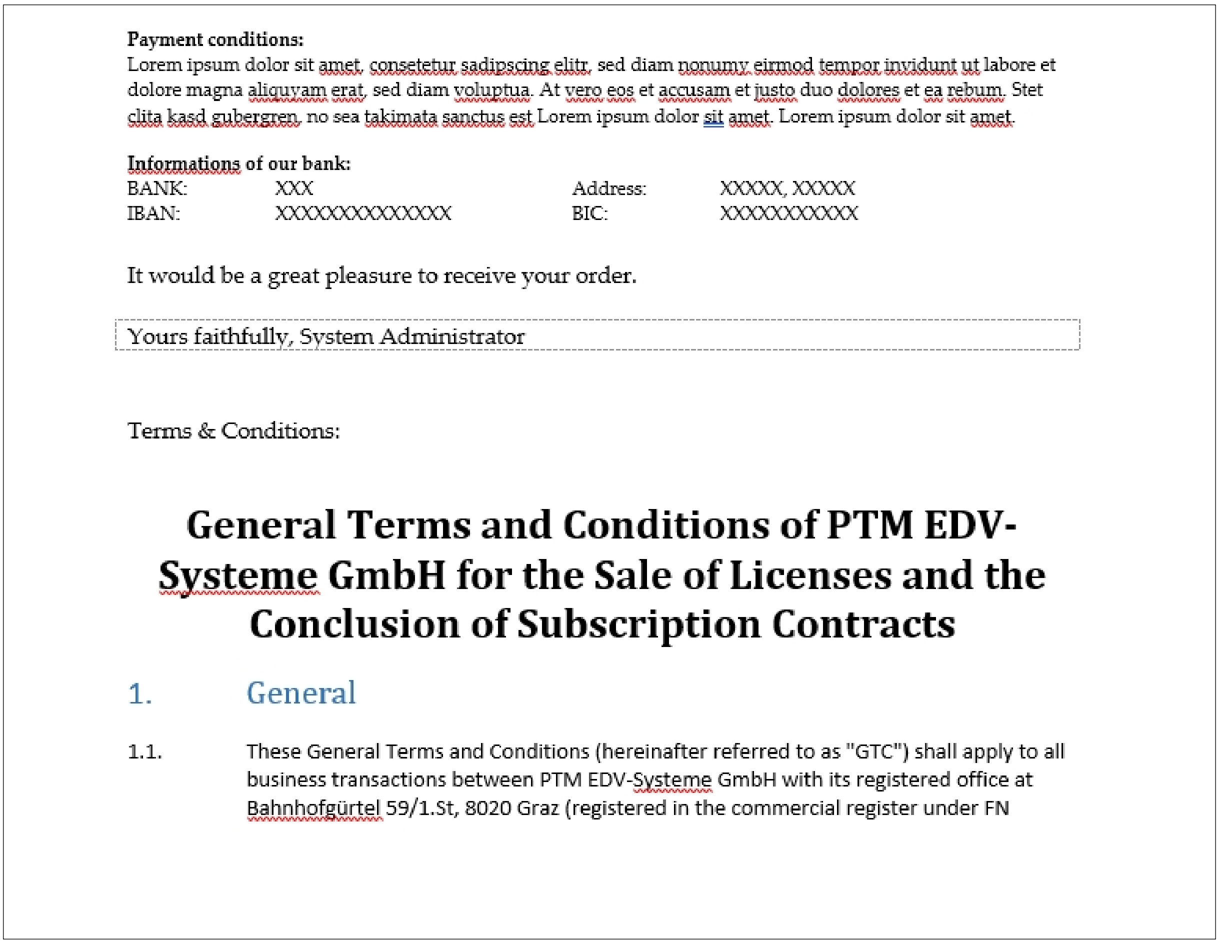


Figure 138: Save Template option

Now you can test if your template is working. In the example below you can see that the Terms and Conditions are added to the template.



Payment conditions:
Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet.

Informations of our bank:

BANK:	XXX	Address:	XXXXX, XXXXX
IBAN:	XXXXXXXXXXXXXX	BIC:	XXXXXXXXXXX

It would be a great pleasure to receive your order.

Yours faithfully, System Administrator

Terms & Conditions:

General Terms and Conditions of PTM EDV-Systeme GmbH for the Sale of Licenses and the Conclusion of Subscription Contracts

1. General

1.1. These General Terms and Conditions (hereinafter referred to as "GTC") shall apply to all business transactions between PTM EDV-Systeme GmbH with its registered office at Bahnhofgürtel 59/1.St, 8020 Graz (registered in the commercial register under FN

Figure 139: The Terms and Conditions are added as document

6.14. How to use the "Insert as HTML" option in DocumentsCorePack Templates

This feature enables you to easily insert content (pictures, texts, etc.) into documents that have been added to a Dynamics 365 record in HTML format, via the rich text editor. This functionality interprets HTML code stored in Dynamics 365 and displays the content appropriately in generated documents.

Prerequisites: Before you can use this functionality, it is required to support HTML within Dynamics 365 itself. Next to 3rd party providers, Microsoft provides Out-of-the-Box capabilities to enter HTML via the **rich text** control as described here.

Step-by-Step: Add "rich text" capabilities to a field in Dynamics 365

Step 1: In this example, we want to insert the content in the HTML editor from Dynamics 365 into a quote.

1. Open Power Apps.
2. Navigate on the left to **Tables**.
3. Select the table you want to open.
4. Click on the three dots and open the table (in this example it is **Account**).

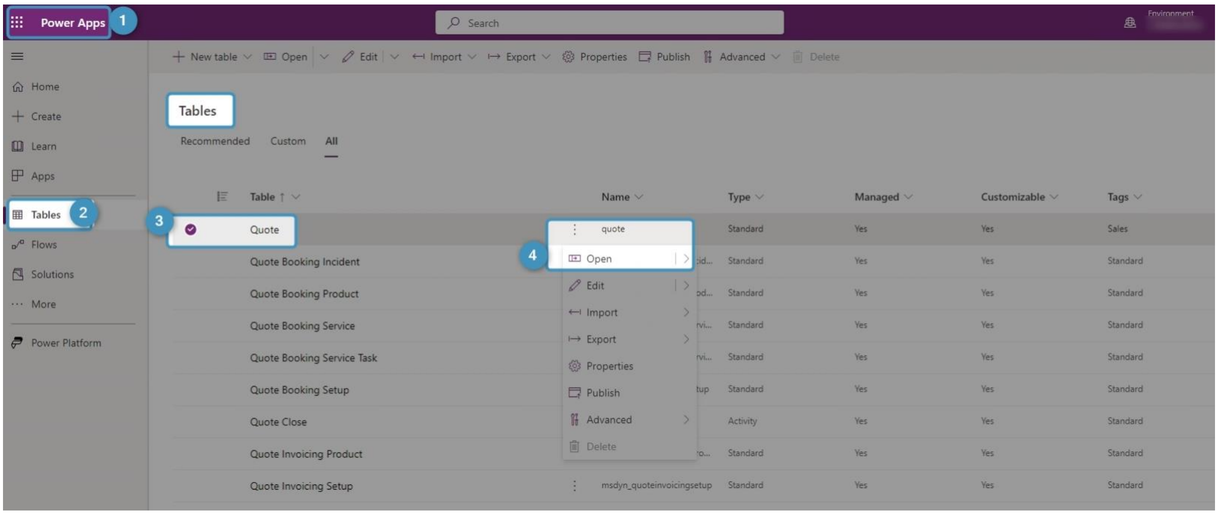


Figure 140: Insert the HTML editor content into a quote

Step 2: This overview is shown (see Figure below), open 1 **Forms**.

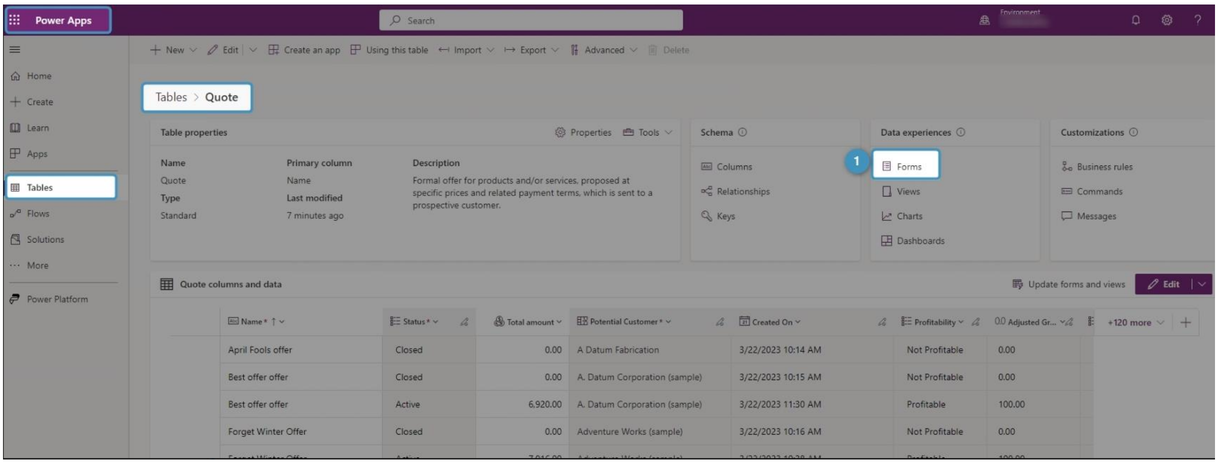


Figure 141: Open Forms

Step 3: When **Forms** opens:

1 Click in the **Description** field.
2 Navigate to the right side and add it with **+ Component**.
3 Select the **Rich Text Editor Control**.

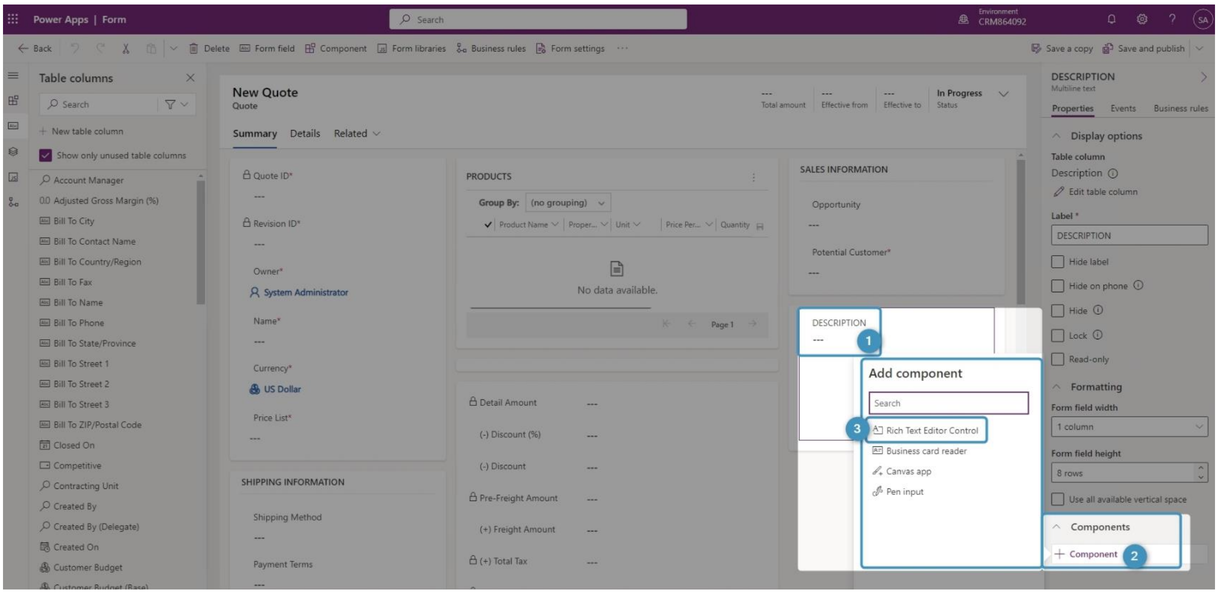


Figure 142: Add Rich Text Editor Control

Step 4: Confirm with **Done**.

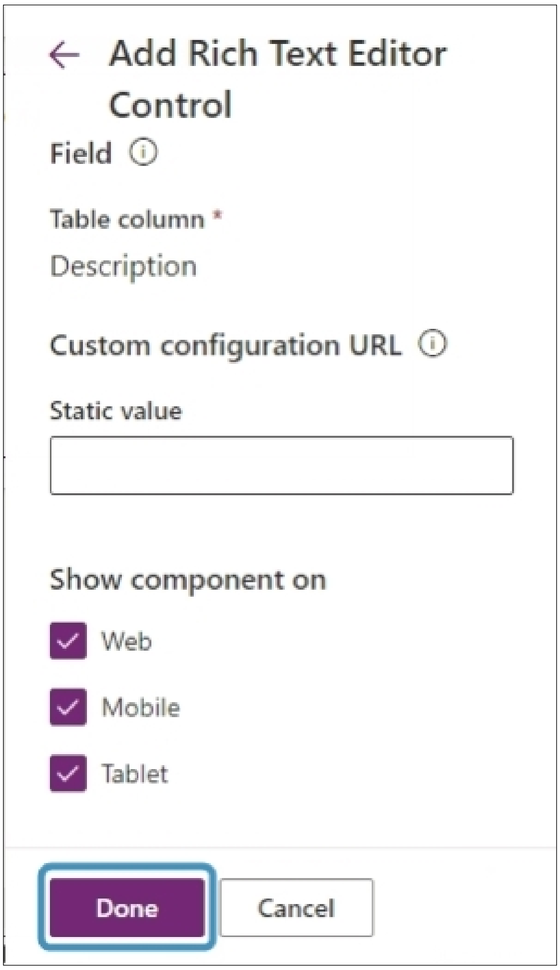


Figure 143: Confirm Rich Text Editor Control

Step-by-Step: Using the "Insert as HTML" option to load content from a Rich Text field into a document

In our example, we have added a rich text field to the Quote entity. We added the company´s logo and a price table.

Step 1: First, open a 1 **Quote** in your Dynamics 365. As you can see on the right side, the 2 **Description** field is editable. Now you can add and format accordingly. Don´t forget to 3 **Save** or **Save & Close**.

Please note: If the number of characters is too small, you must increase the field length in your Dataverse accordingly.

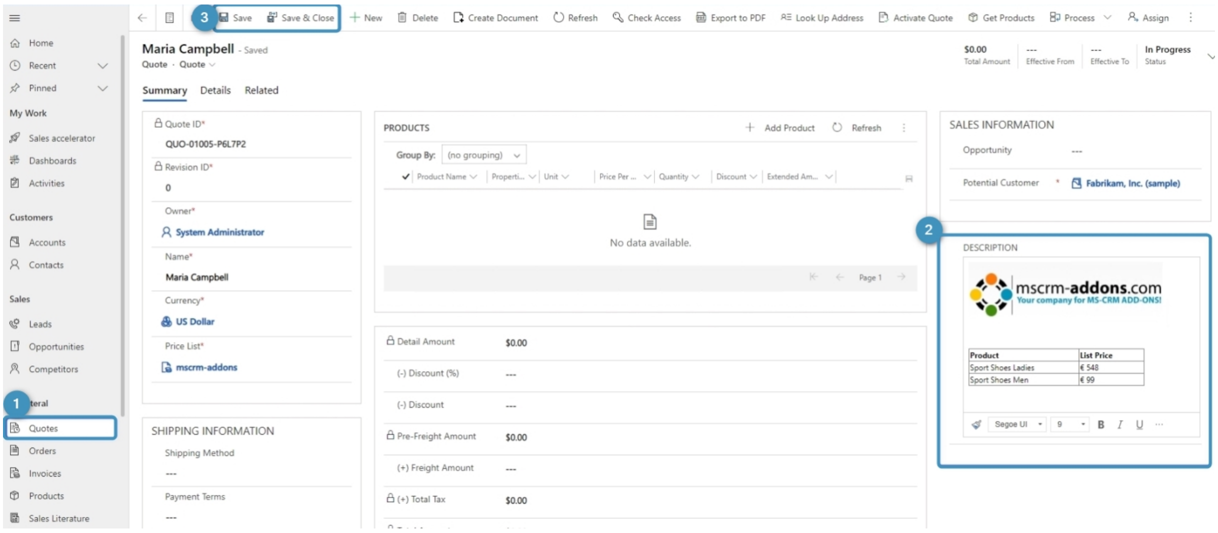


Figure 144: Open a quote and add/format accordingly

Step 2: Next, open a Word document and navigate to the 1 **mscrm-addons.com** tab. To begin creating your template, click on the 2 **Insert MailMerge Fields**, navigate to the right, and click on 3 **Description**. Then on the bottom-right, hit the Insert Field button and then 3 **Insert "Description" as HTML**.

In this example, we prepared a Quote with an additional 3 **<<description>>** field. Don´t forget to 4 **save** your template.

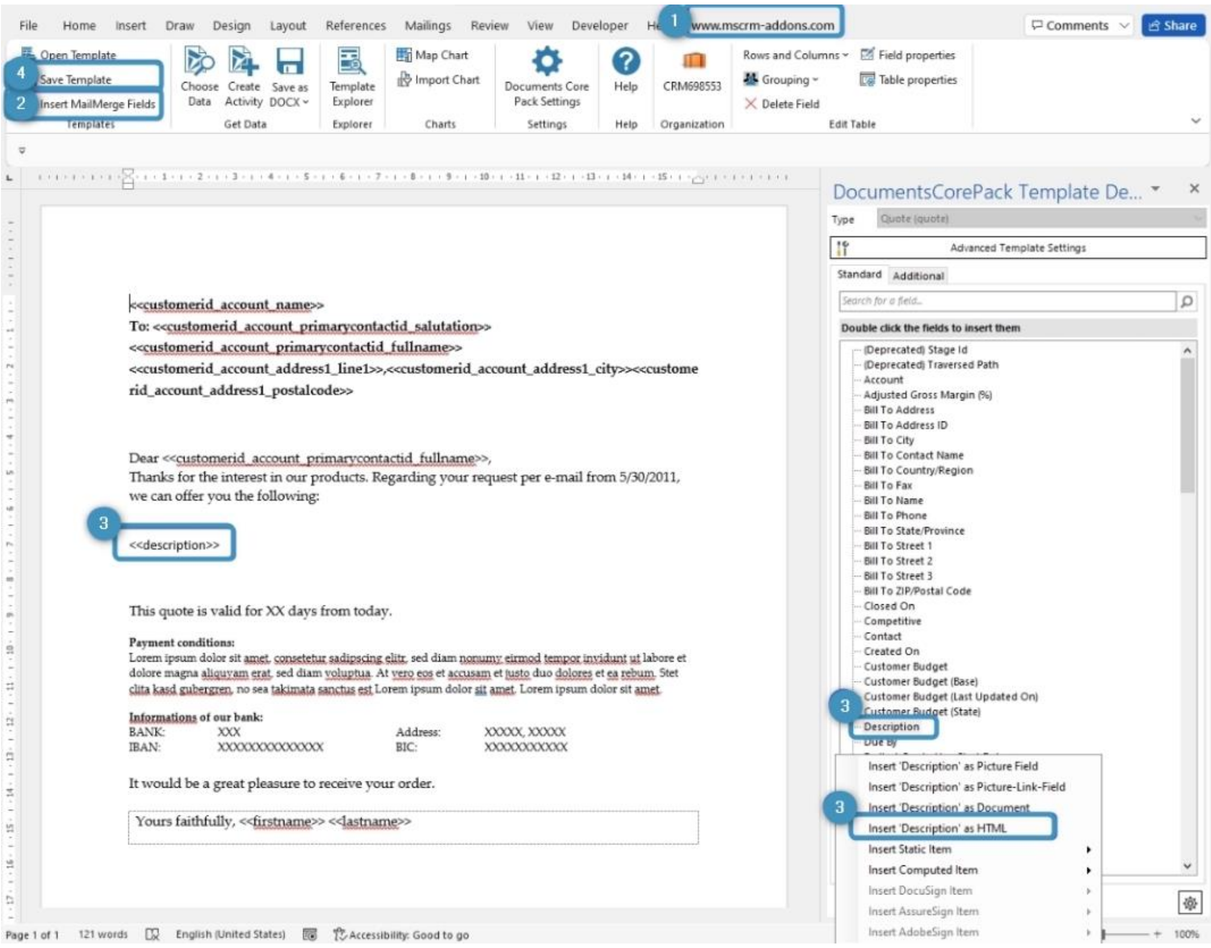
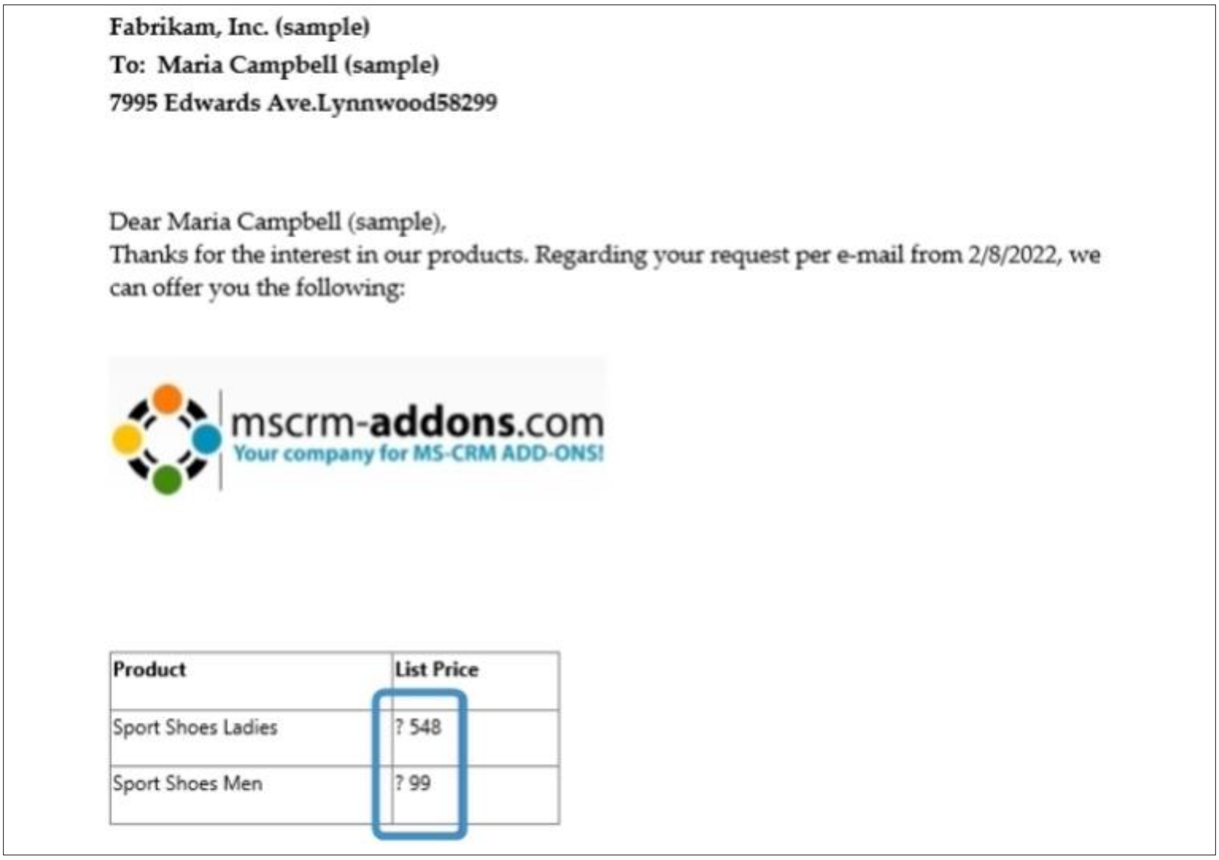


Figure 145: Create and save your template

Step 3: Now you can [test and utilize your template.](#)

6.14.1 Troubleshoot

If you notice that some special characters (like the Euro sign (€) in the figure below) are not displayed properly, it may be due to the encoding.



Fabrikam, Inc. (sample)
To: Maria Campbell (sample)
7995 Edwards Ave.Lynnwood58299

Dear Maria Campbell (sample),
Thanks for the interest in our products. Regarding your request per e-mail from 2/8/2022, we can offer you the following:

mscrm-addons.com
Your company for MS-CRM ADD-ONS!

Product	List Price
Sport Shoes Ladies	? 548
Sport Shoes Men	? 99

Figure 146: Special characters due to issues with encoding

In this case, open the template, set the cursor in the **Description** field, and change the setting via the **Field properties** to:

HTML Type: **Typ 4**
Encoding: **UTF-8**
Confirm with **OK**.

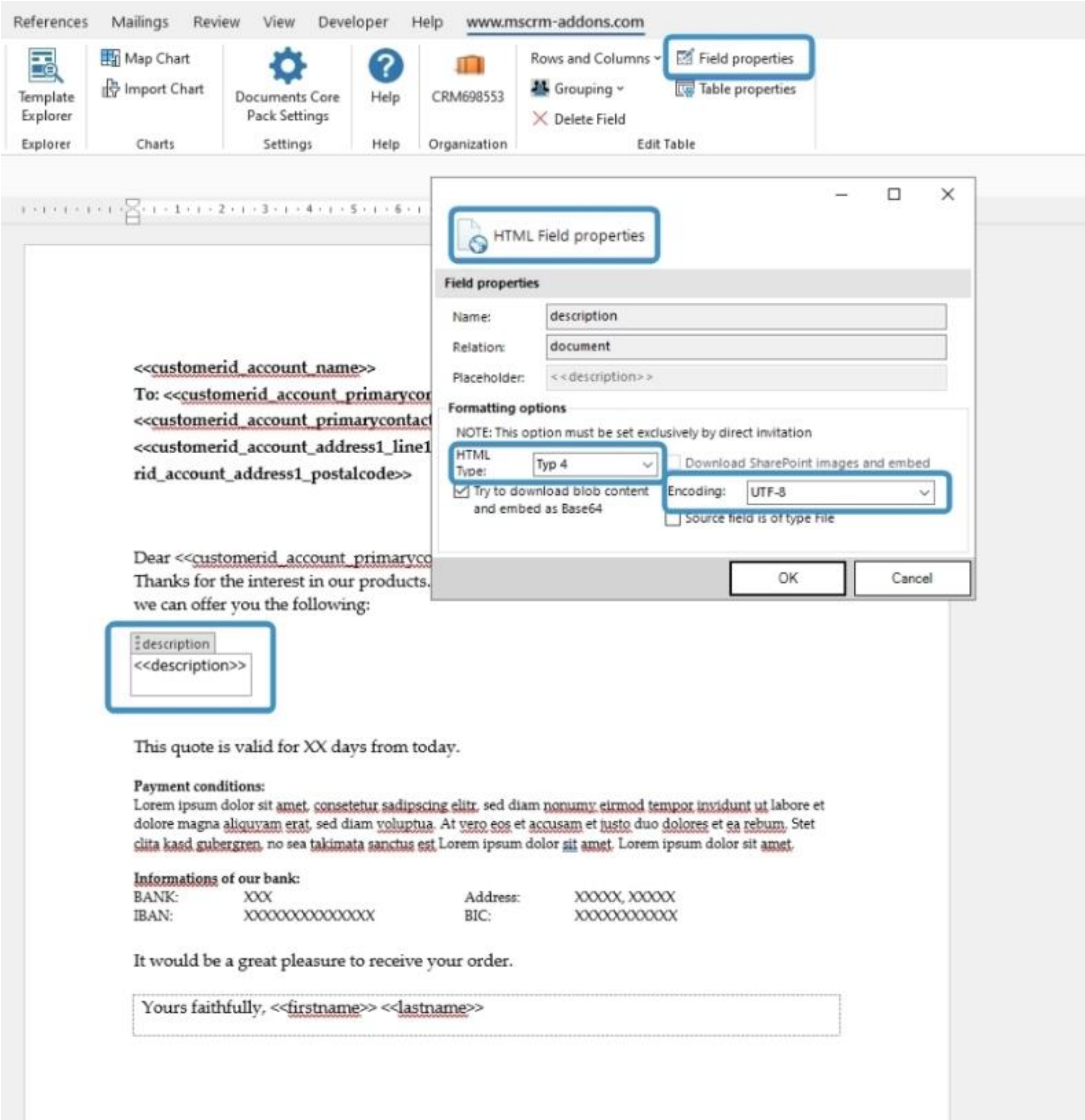


Figure 147: Edit, save, and test the template again after troubleshooting

Test your template again to ensure it is now working correctly.

6.15. The "Insert Static Document" option in DocumentsCorePack Templates

The **Insert Static Document** functionality allows you to insert a sub-template into your current template or to insert further text documents, like **Terms and Conditions**.

The following example shows a template with a placeholder for a sub-template 1 and the final merged document 2.

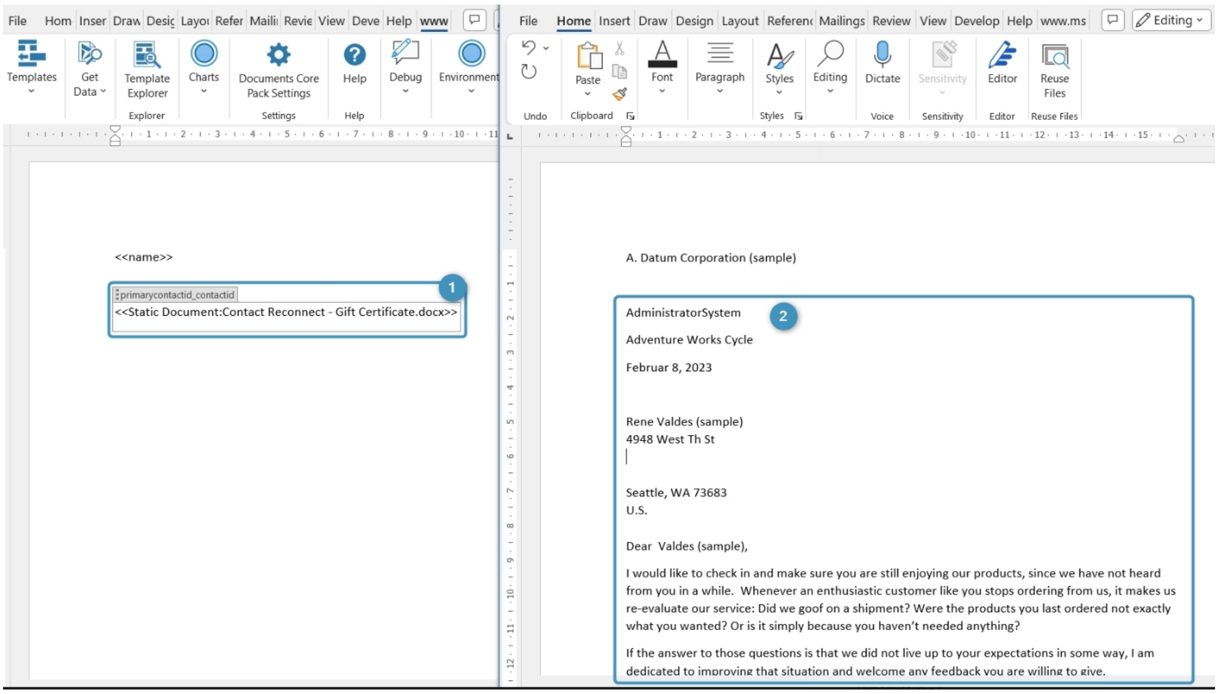


Figure 148: Example of a sub-template

6.15.1 Use the "Insert Static Item" option

Insert Field > Insert Static Item > 1 Static Document

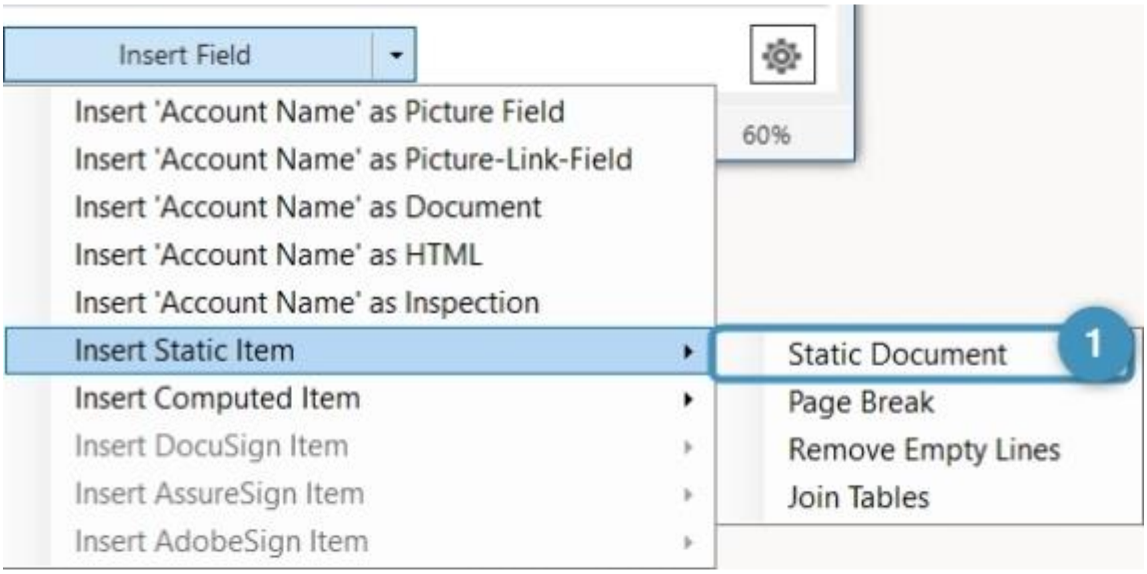


Figure 149: Insert Static Document

6.15.2 Select a document to insert

At this point, you have two options. You can either select a sub-template and provide the necessary field as a merge parameter or you can skip this step and select a static document (which does not require a parameter for merging).

1. Provide a merge parameter [optional]

Select an ID-field from the treeview (for example: Contact) 1 and check the Provide the selected field as a parameter checkbox 2.

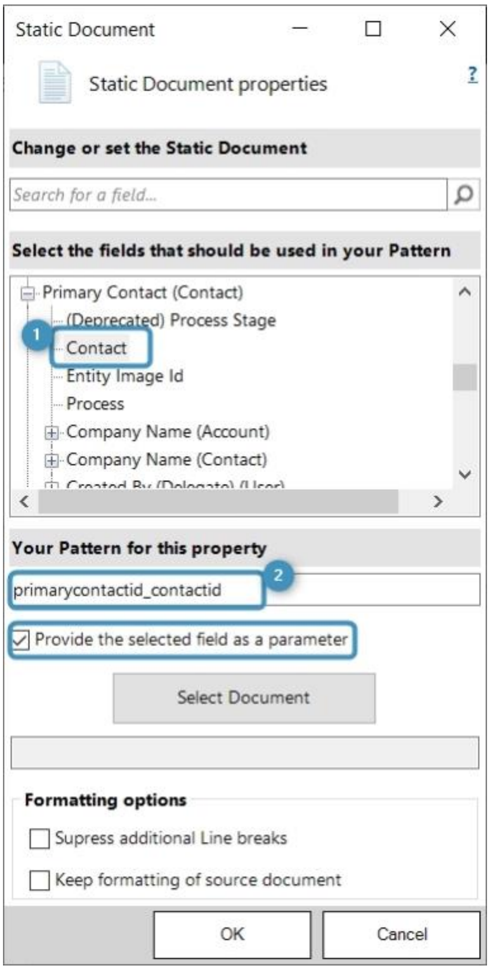


Figure 150: Provide a parameter

2. Hit the "Select Document" button

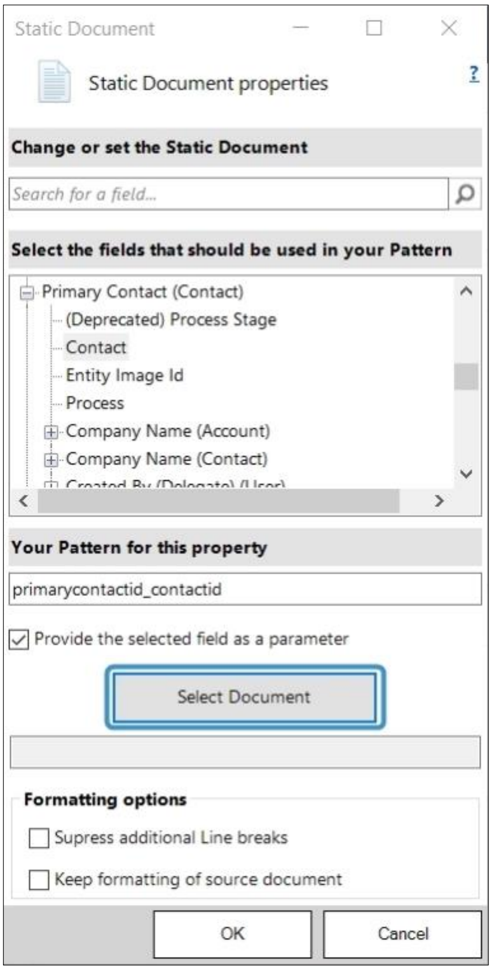


Figure 151: Hit "Select Document" to open the Lookup record

3. Select a Subtemplate or a static document

All the available documents are stored in the DocumentsCorePack templates entity.

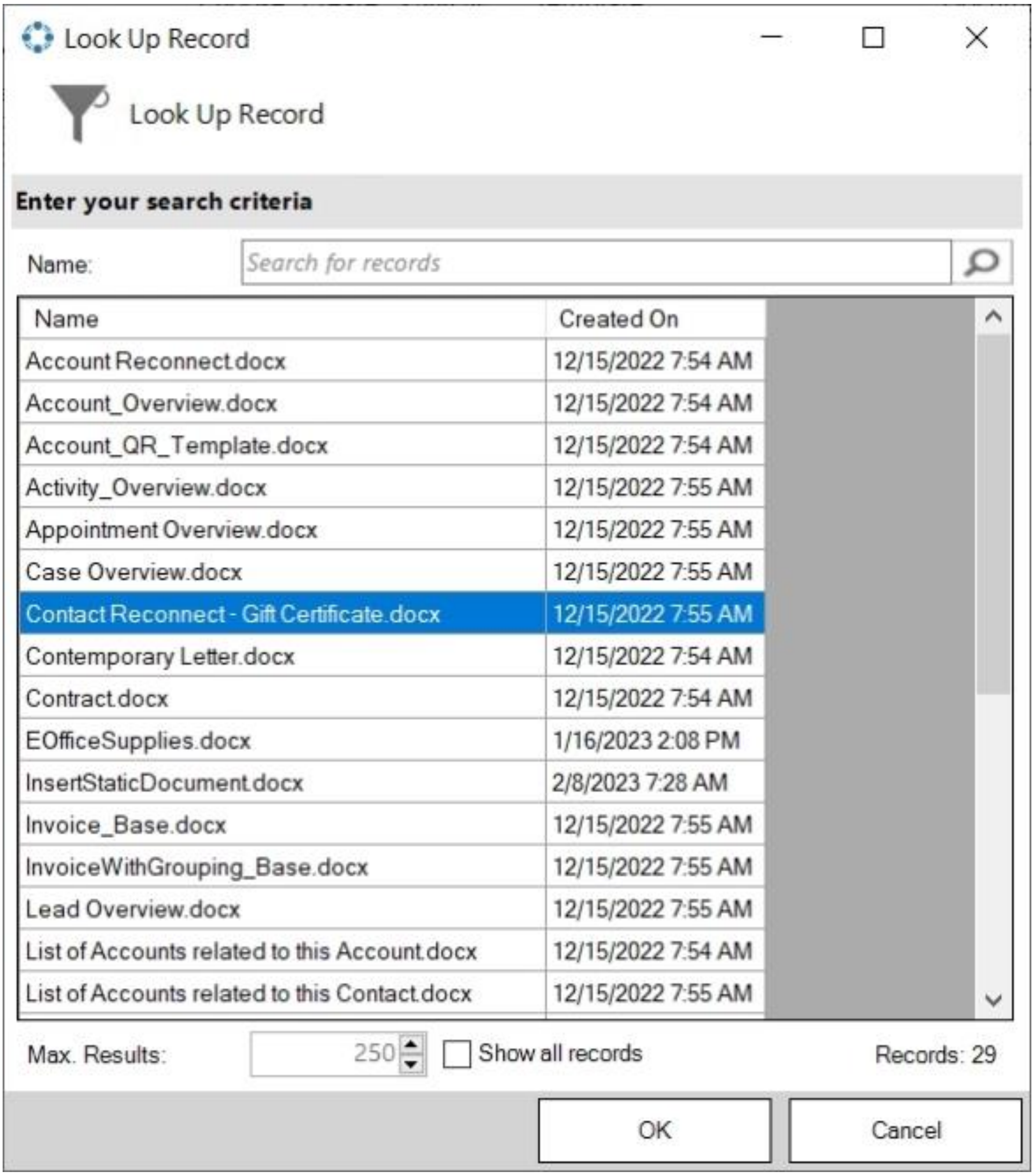


Figure 152: Document selection (Look up window)

6.15.3 Insert a placeholder

You will notice the name of the selected template in the new window 1. Apply the new field by clicking the **OK** button 2.

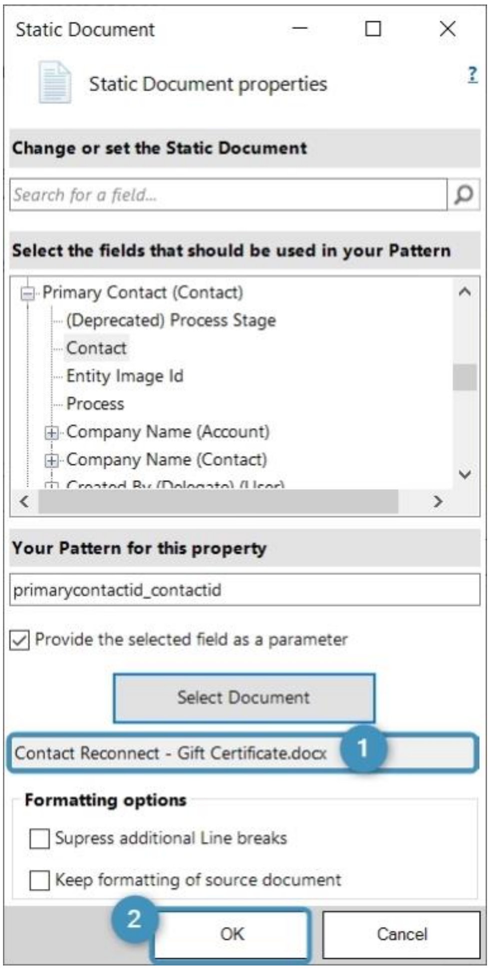


Figure 153: Template added

6.15.4 Save your Template

Before you can use or test your template, you must save it. Either save your template locally with the standard **Save** or **Save as** functionality of Word or use the **Save template** option of the DocumentsCorePack TemplateDesigner to publish the template to Dynamics 365.

6.15.5 Test your template [optional]

As you make changes to your template, you may want to test it.

6.16. The "Insert PageBreak" button in DocumentsCorePack templates

how to use the **Insert PageBreak** button within the **Insert Field** button in DocumentsCorePack templates. This feature allows you to insert a dynamic PageBreak into your document.

The **Insert PageBreak** functionality also works in tables. For example, if you have a table with product information and you insert a **PageBreak**, you can have an extra page for each product as a result.

Step-by-step description

Step 1: Open a DocumentsCorePack template or create a new one. Navigate to the ② **Insert MailMerge Fields** within the ① **www.mscrm-addons.com** tab. The ③ **DCP task pane** will open.

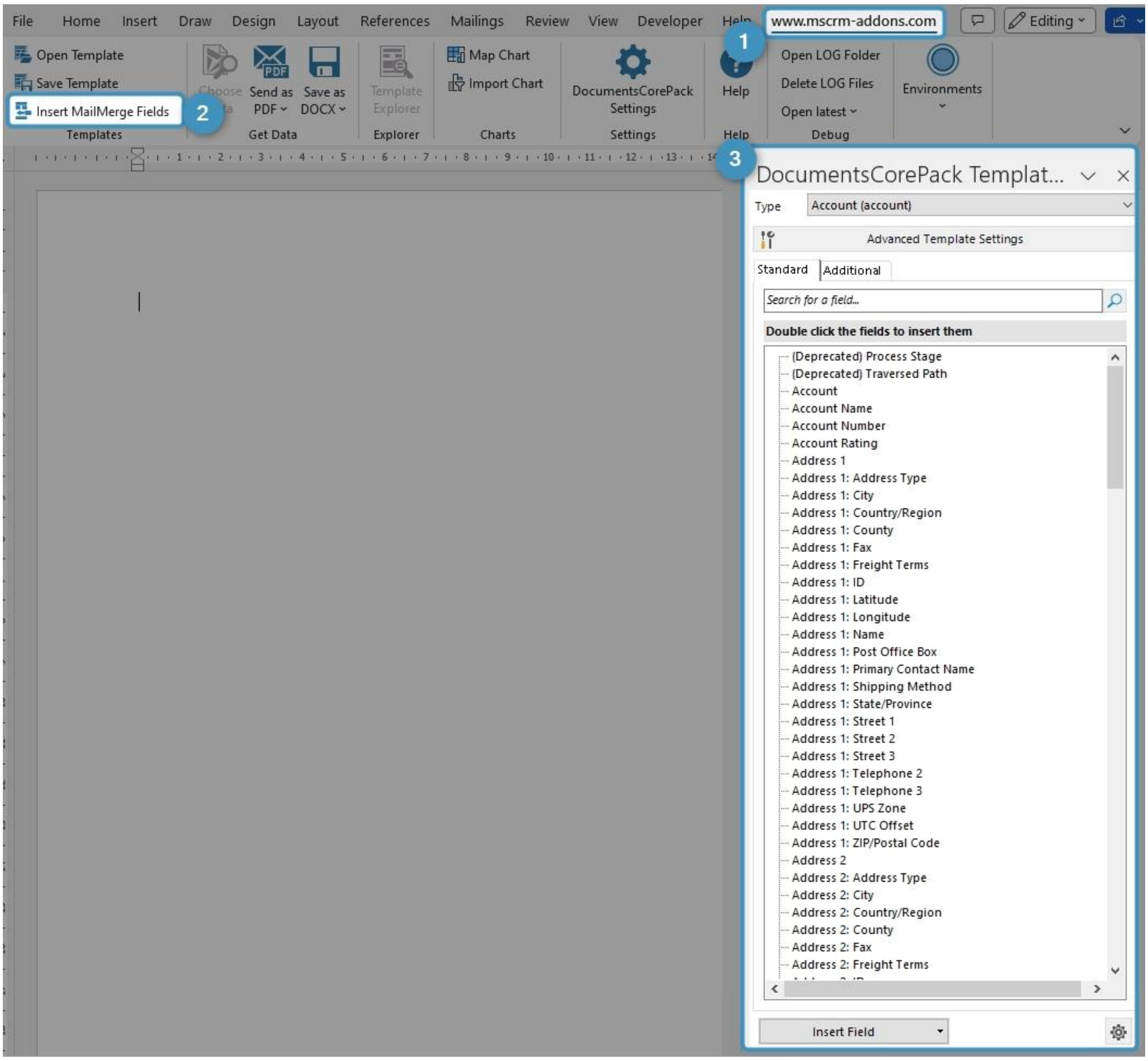


Figure 154: Open the DocumentsCorePack Template Designer

Step 2: Navigate to the 1 **DCP task pane**, click on the **Insert Field** button, choose 2 **Insert static Item** and then select 3 **PageBreak**.

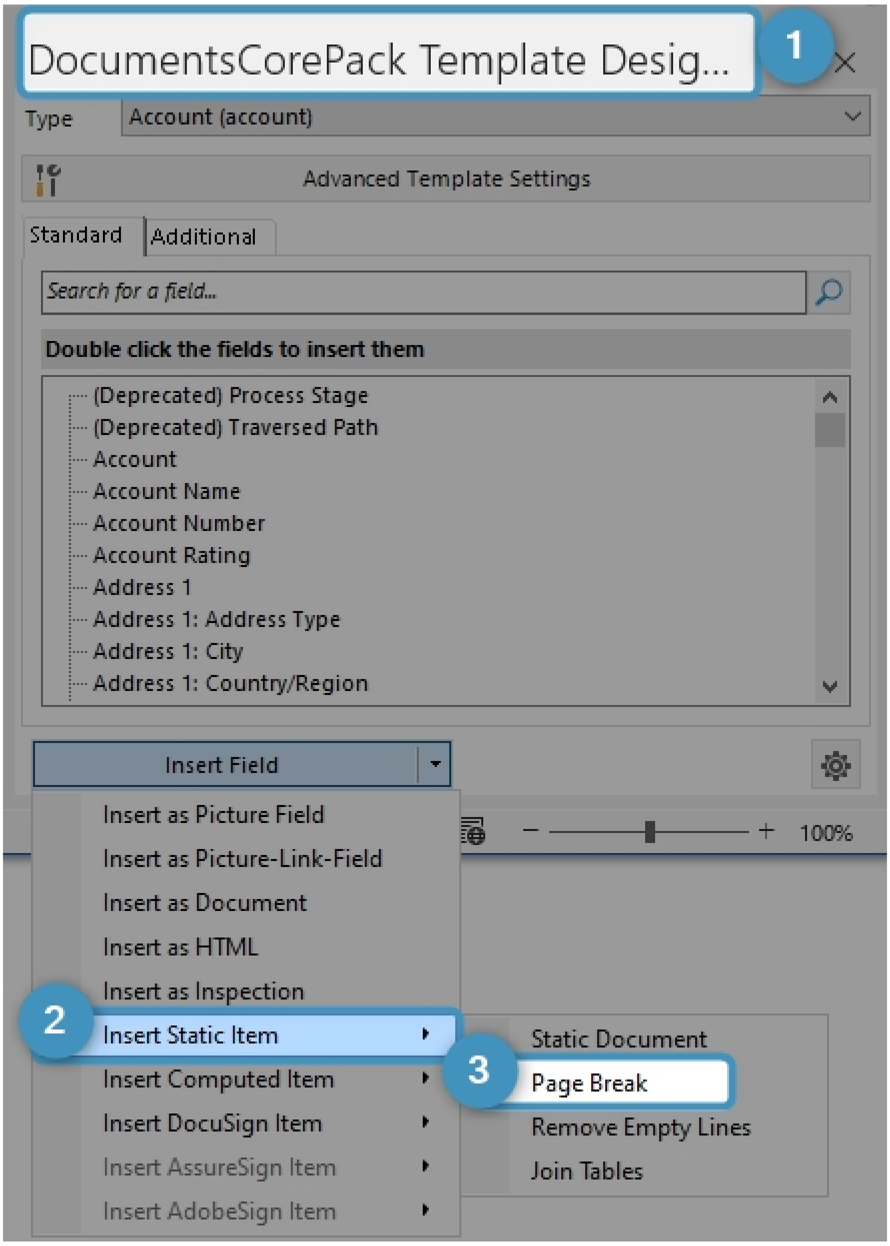


Figure 155: Insert Page Break

Step 3: Place the **PageBreak** field in your DCP template. A 1 placeholder will be displayed.

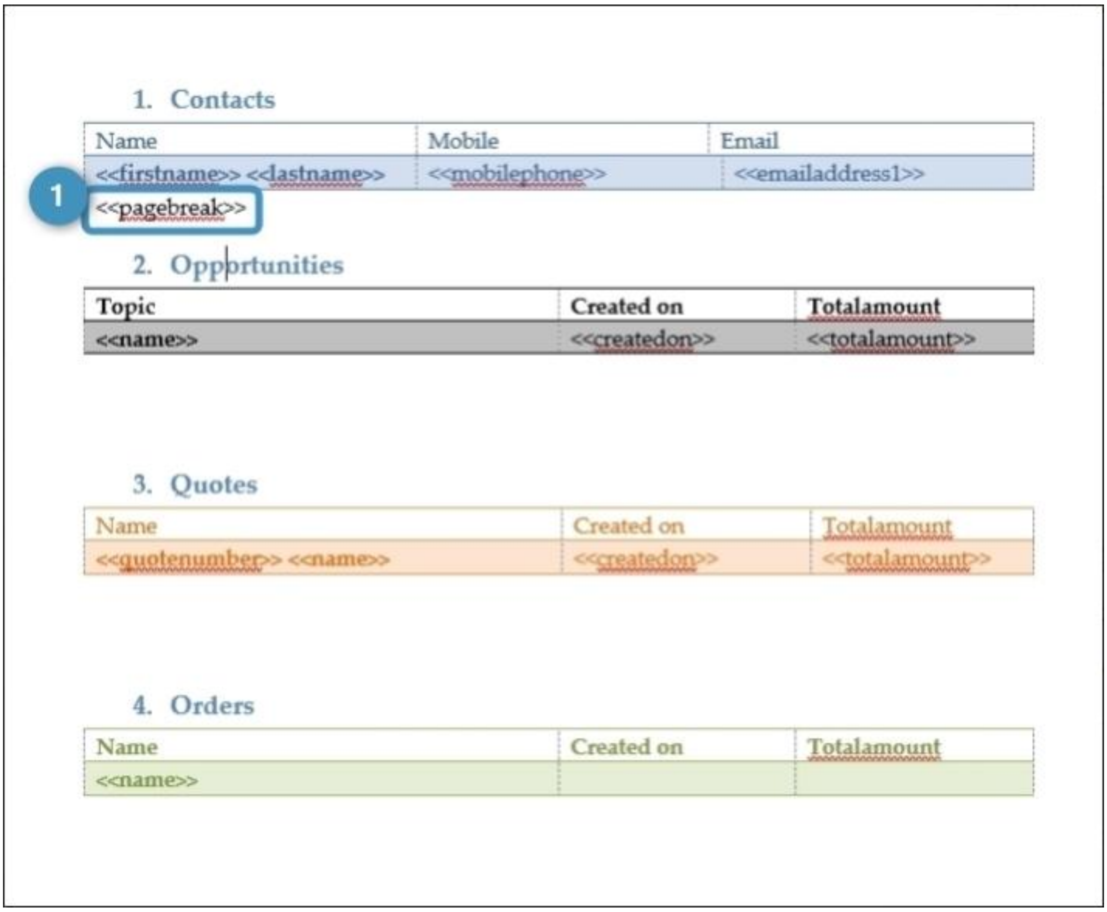


Figure 156: Placeholder

After merging the template, you can see the **Page Break** is added.

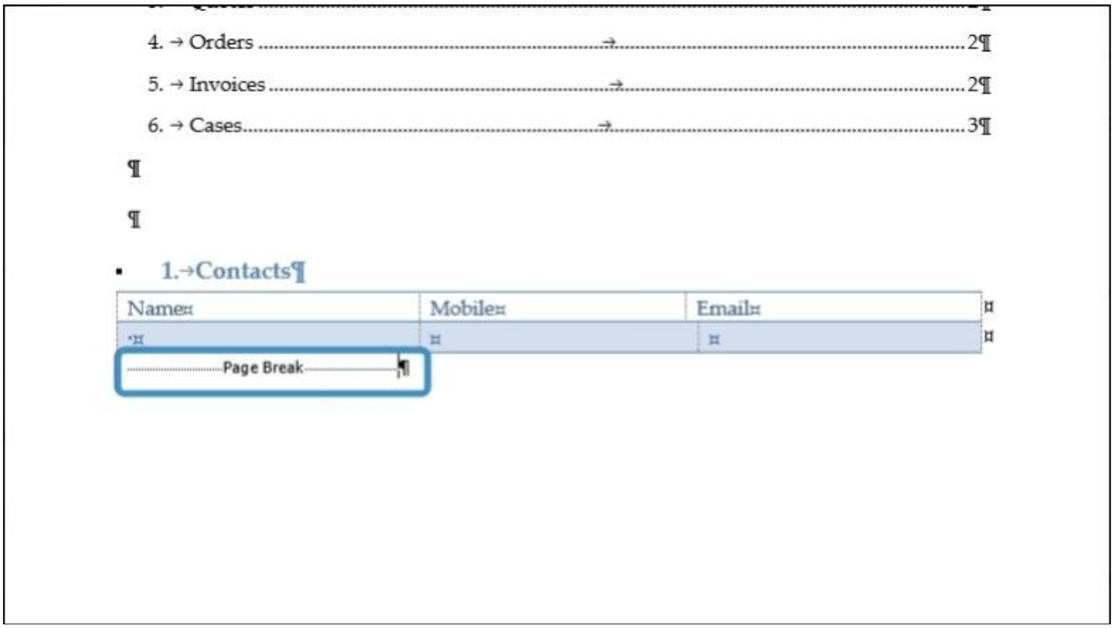


Figure 157: Page Break

6.17. The “Insert Remove Empty Lines” button in DocumentsCorePack templates

Remove Empty Lines fields are a simple way to dynamically structure your document after a merge process. In this example, empty lines are shown in the document on the left (between the **Contact** table and the **Opportunities** table), but in the document on the right, these empty lines are deleted.

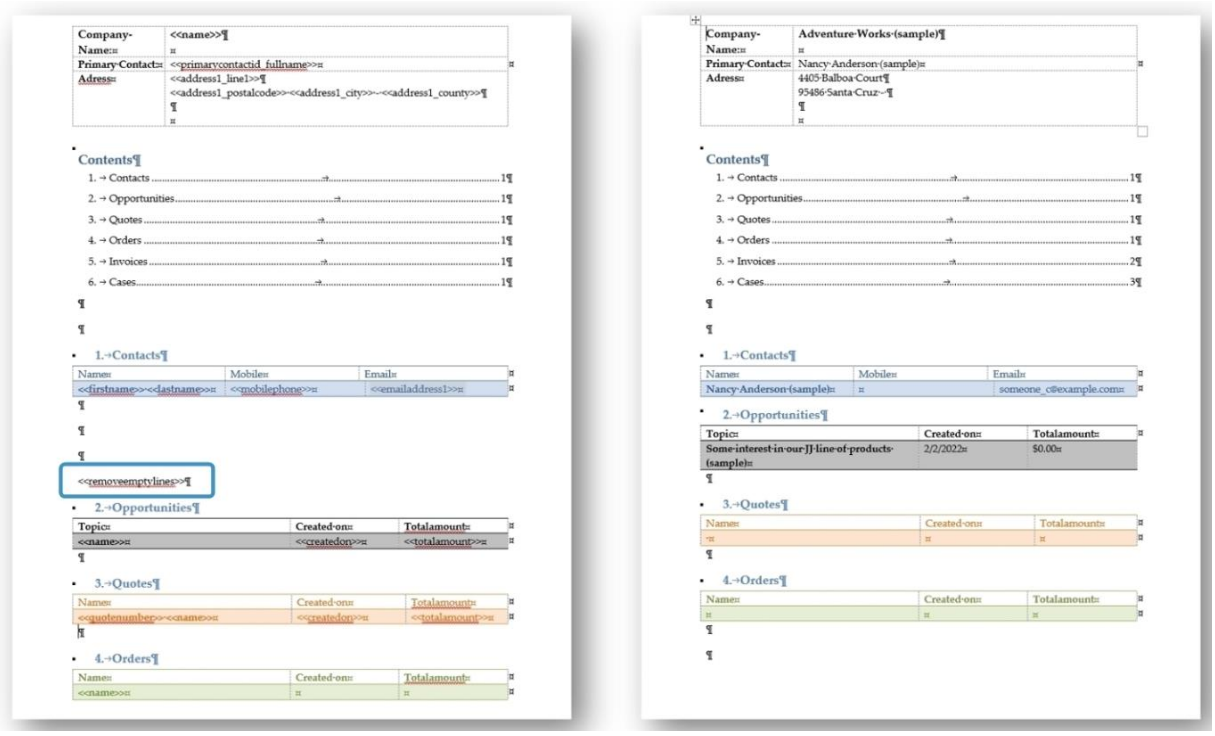


Figure 158: No empty lines removed

Step-by-step description

Step 1: Open a DocumentsCorePack template or create a new one. Navigate to the ② **Insert MailMerge Fields** within the ① **www.mscrm–addons.com** tab and the ③ **DocumentsCorePack** task pane opens.

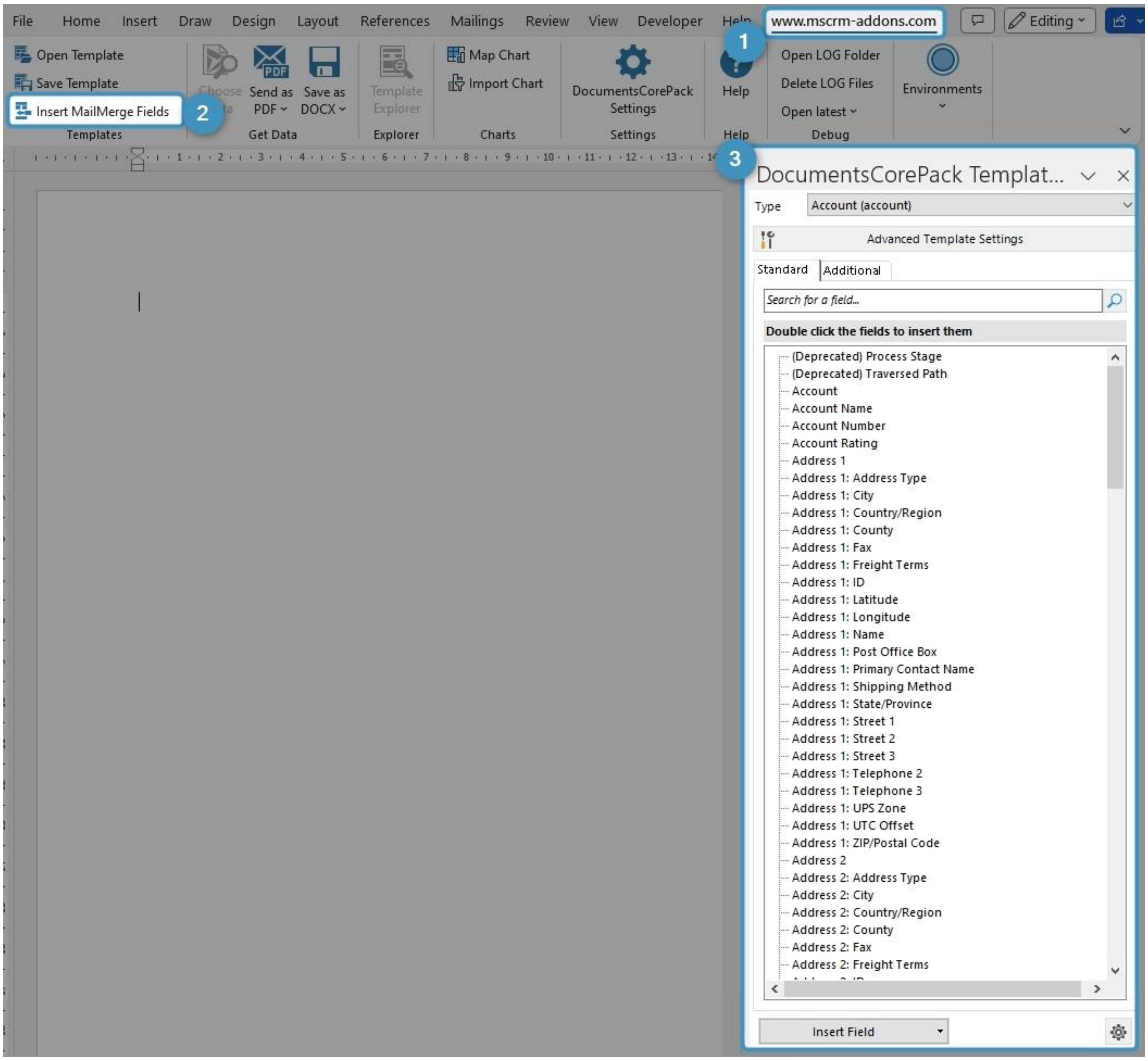


Figure 159: Open Template Designer

Step 2: Navigate to the 1 **DocumentsCorePack** task pane, click the Insert Field button, choose 2 **Insert Static Item** and then select 3 **Remove Empty Lines**.

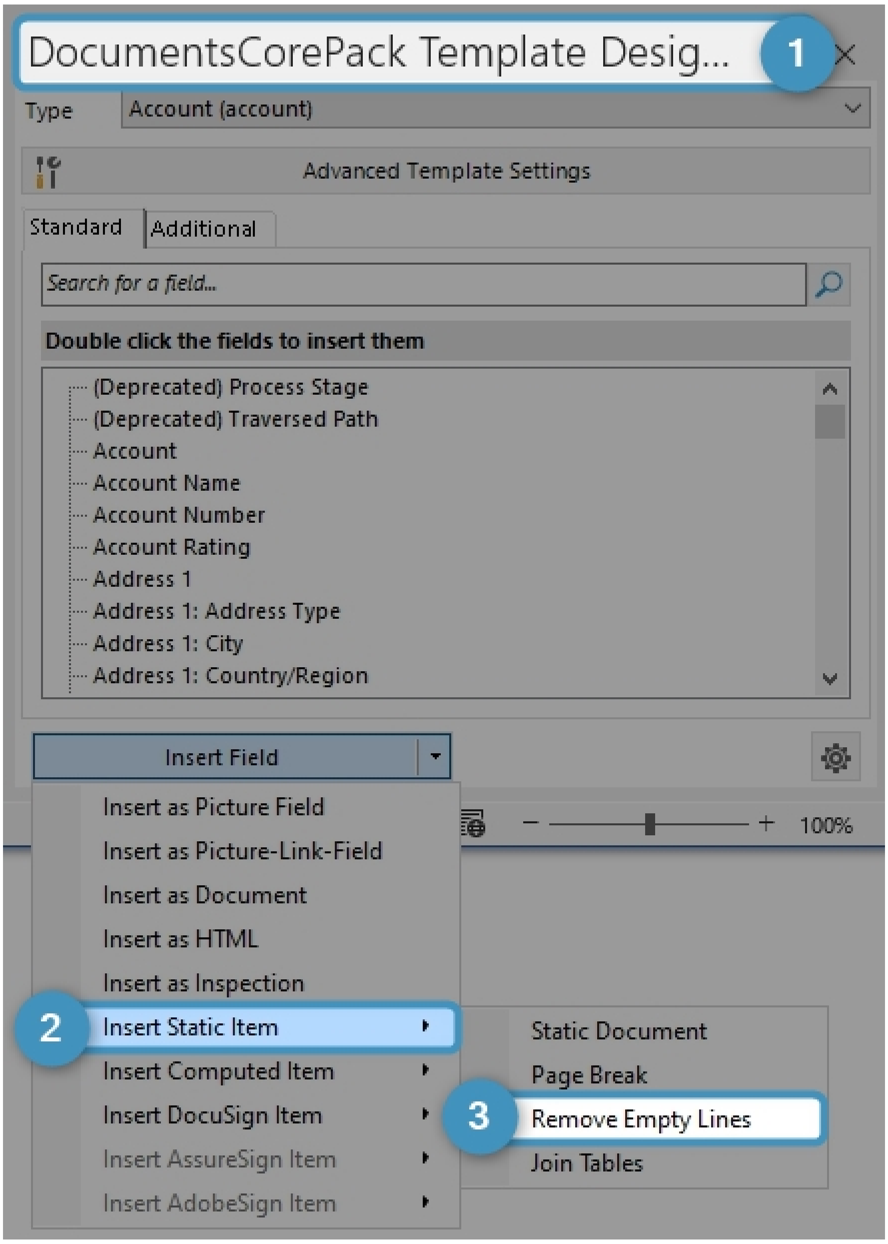


Figure 160: Remove Empty Lines option

Step 3: Place the **Remove Empty Lines** in your DCP template, as shown below.

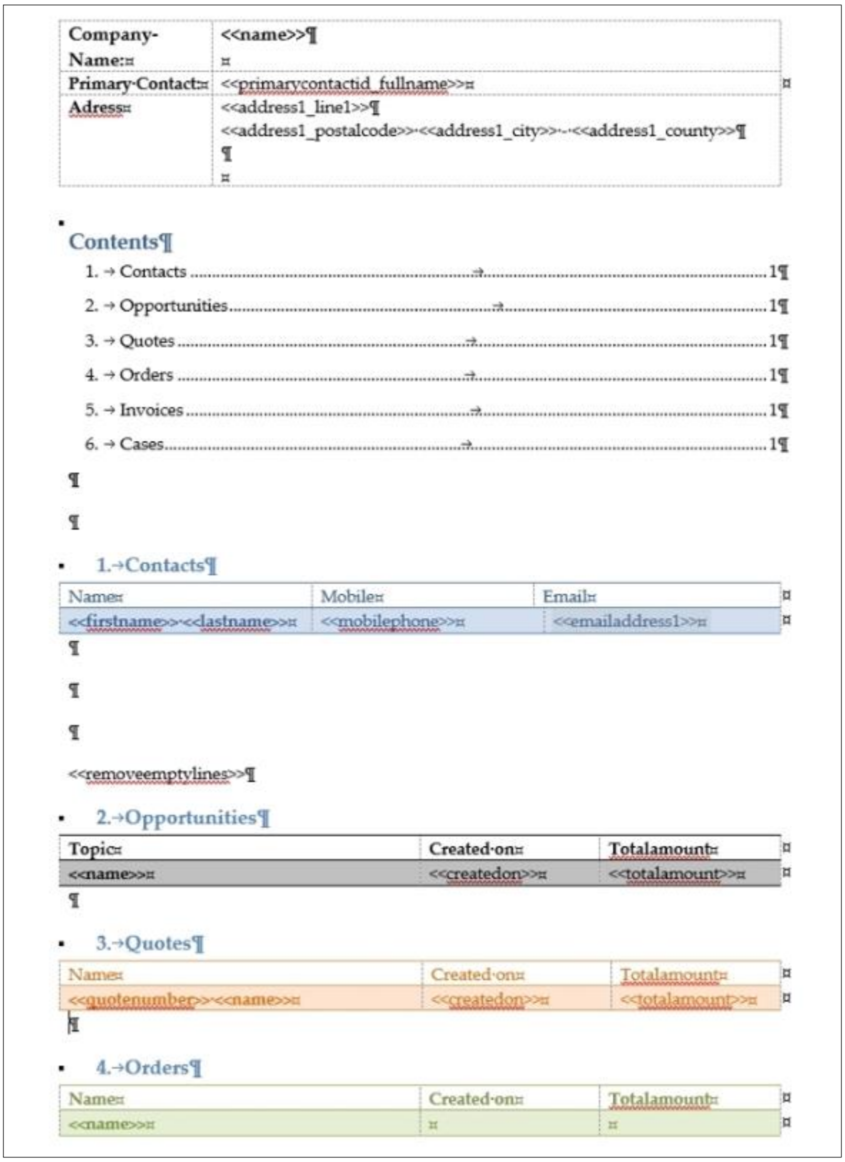
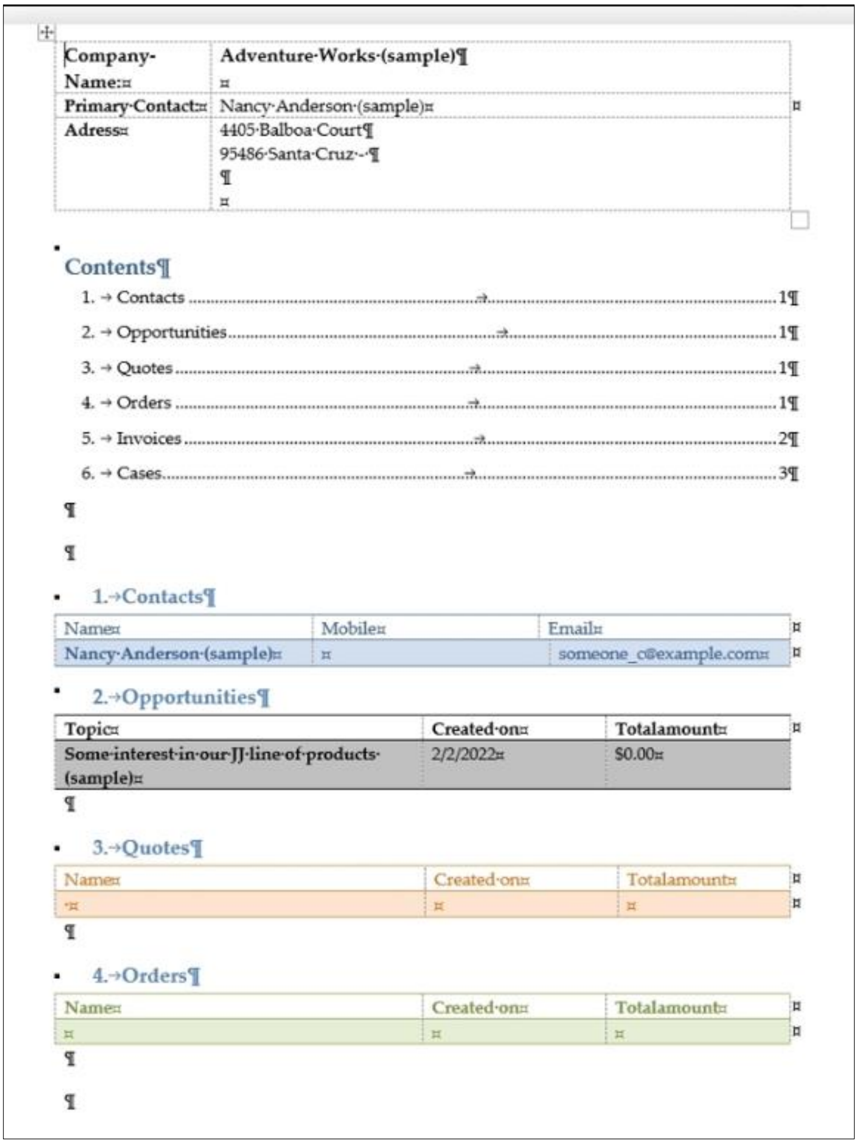


Figure 161: Insert "Remove Empty Lines"

Step 4: Now merge the template by pressing the **Choose Data** button in the Word ribbon.



Company Name:	**Adventure Works (sample)**
Primary Contact:	Nancy Anderson (sample)
Adress:	4405 Balboa Court 95486 Santa Cruz -

Contents

1. Contacts

Name	Mobile	Email
Nancy Anderson (sample)		someone_c@example.com

2. Opportunities

Topic	Created on	Totalamount
Some interest in our JJ line of products (sample)	2/2/2022	$0.00

3. Quotes

Name	Created on	Totalamount

4. Orders

Name	Created on	Totalamount

Figure 162: Empty Lines are removed

You have now successfully removed empty lines with the DCP TemplateDesigner.

6.18. The "Join Tables" function in DocumentsCorePack Template Designer

This functionality is handy if you want to combine multiple tables with all fields merged into one table.

A step-by-step description of how to insert Join Tables

Step 1: Open a Word template and navigate to the ❶ **mscrm-addons** tab. With the ❷ **Insert MailMerge Fields** you open the ❸ **DocumentsCorePack Template Designer task pane**. Now click on the ❹ **Insert Field** button.

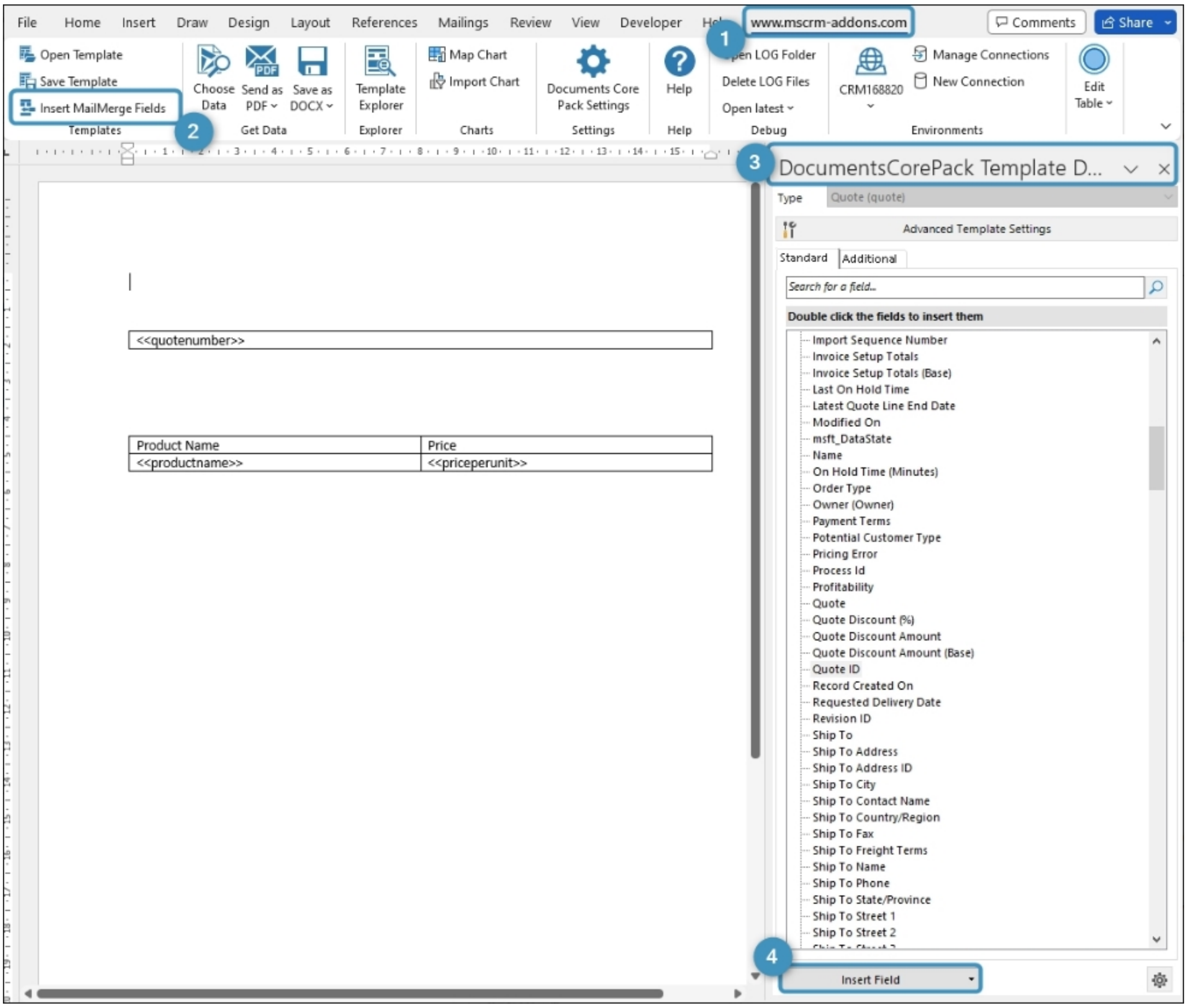


Figure 163: Example of Join Tables function to eliminate space between tables

Step 2: The **Insert Field** button opens a selection of possibilities. Learn [here](#) more. Select **Insert Static Item** and then **Join Tables**.

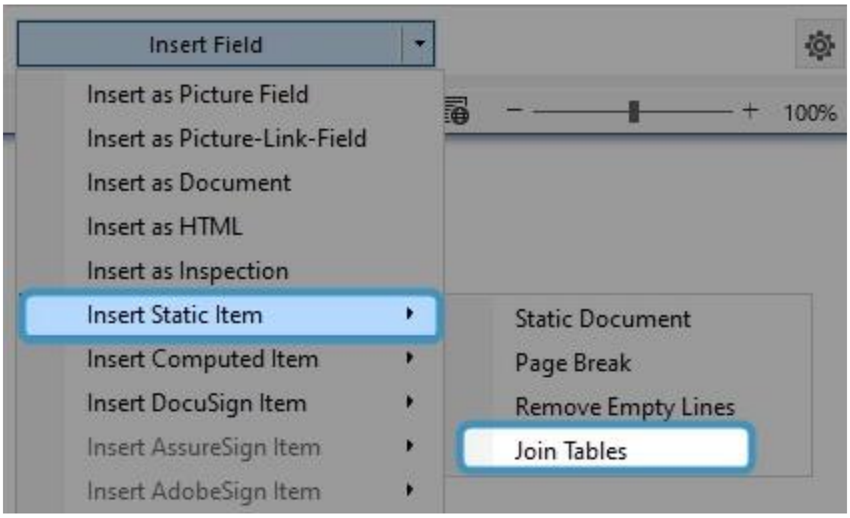


Figure 164: Select Join Tables

Step 3: Place the cursor between the tables and insert the **Join Tables** field with a double-click.

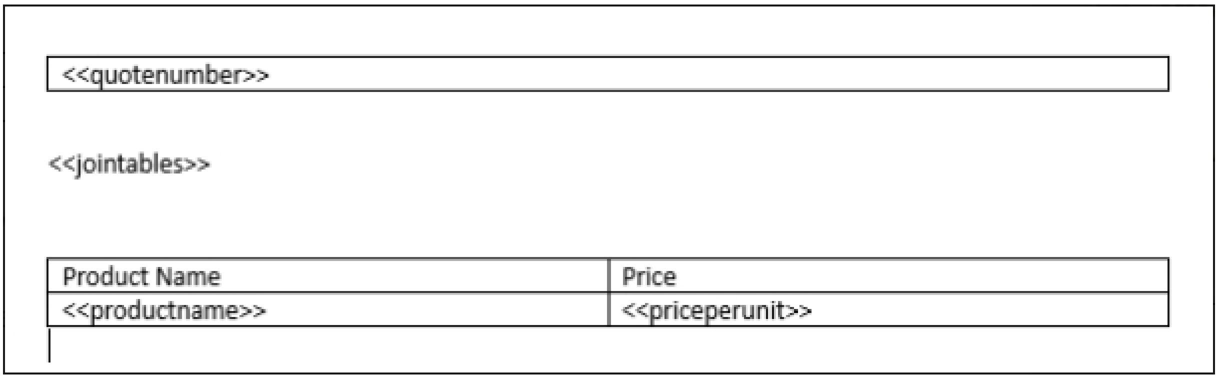


Figure 165: Place cursor between tables

Step 4: Now merge the template. You can see in these results the effect of the Join Tables function. On the left without the function and on the right with Join Tables inserted.

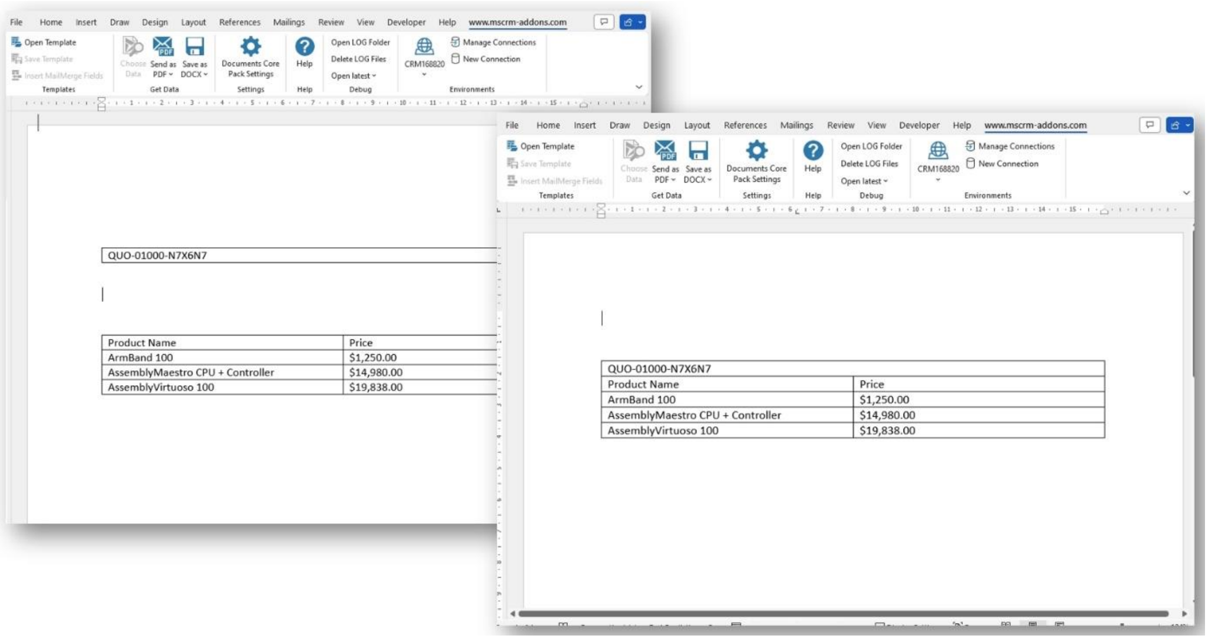


Figure 166: Result

6.19. Insert Computed Item

Contains the following sub options:

- QR Code
- Advanced String
- Calculated field
- Hyperlink
- Condition field
- Prompt Field
- DateTime Field

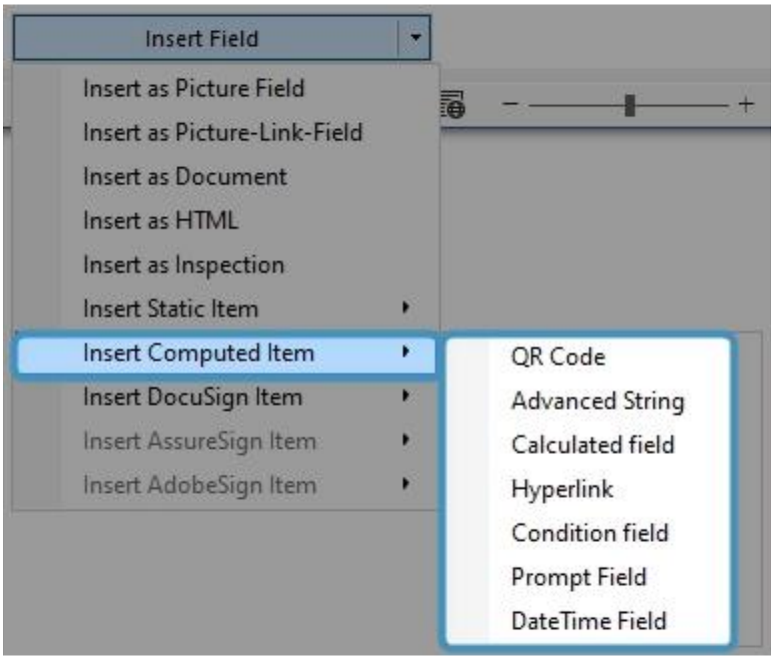


Figure 167: Computed Item with sub options

6.20. Insert QR Code with DocumentsCorePack TemplateDesigner

A QR code is a two-dimensional barcode that can store a lot of information, including text, URLs, phone numbers, email addresses, and more. When you scan a QR code using your smartphone's camera, or another device, the code is decoded and the information it contains is displayed on your screen.

By using the Insert QR Code field, you can establish a design for a QR code that is generated dynamically. The step-by-step guide below outlines how to configure this field using the DocumentsCorePack Template Designer.

Step-by-step description

Step 1: Click on the **Insert Field** button and select via the **Insert Computed Item** the **QR Code**.

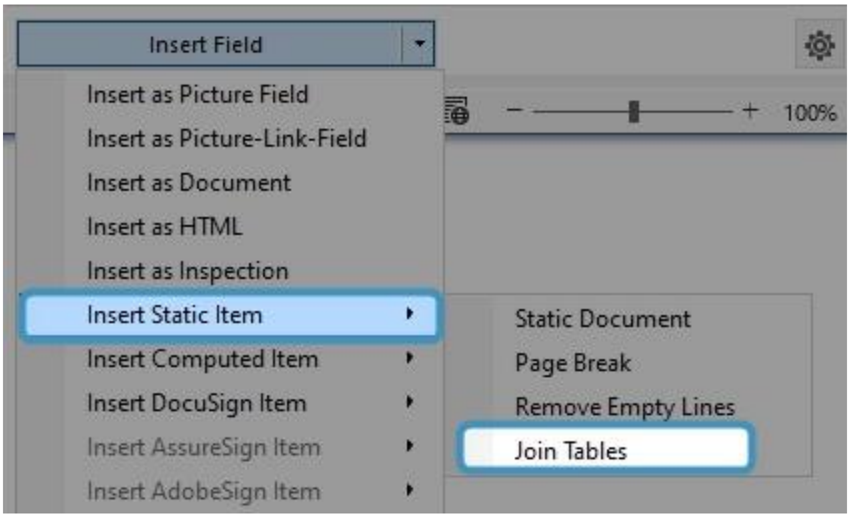


Figure 168: Insert QR via the Insert Field button

Step 2: This Window opens where you can define the 1 link pattern. The text will transform into a QR code.

Please note: When inserting line breaks in your code, use the syntax '\n'. If you need to display multiple lines, use the '+' sign to concatenate them.

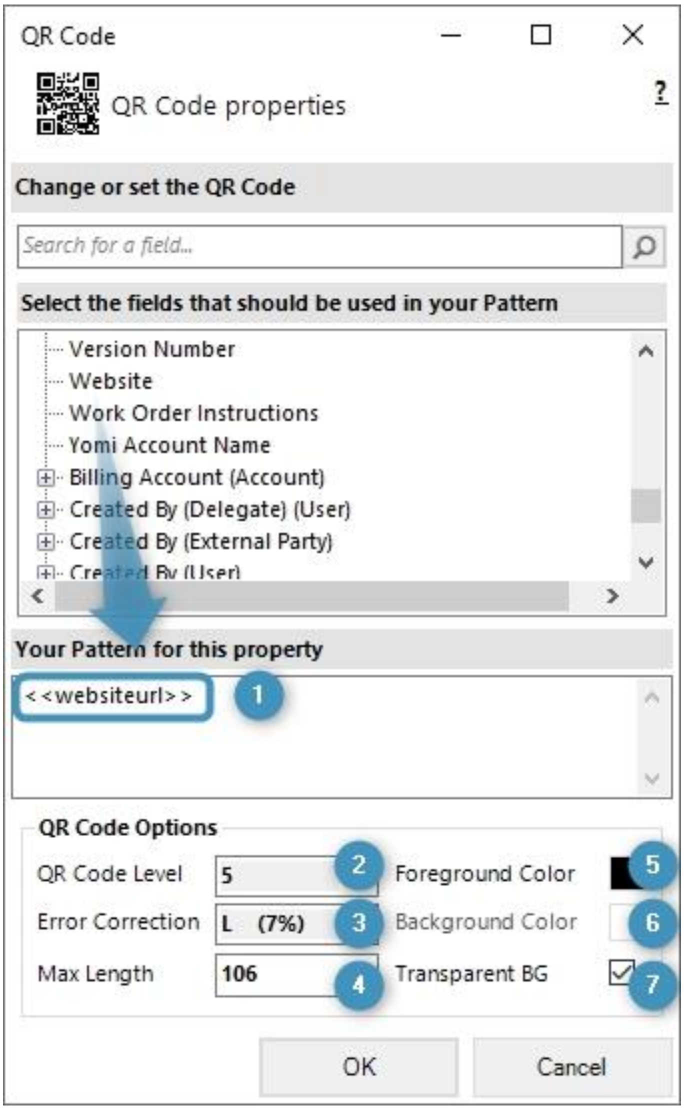


Figure 169: Define Link pattern for QR code and QR Code options

QR Code options:

➋ **QR Code Level**: The QR Code Level refers to the level of detail displayed in the QR code. By default, the code is set to show the minimum amount of information. However, if the user sets the value of this option to 5, with a maximum sign length of 108, then only the first 108 signs will be displayed, and any signs beyond this limit will be truncated.

➌ **Error Correction**: The Error Correction feature of the QR Code determines its capacity and ability to handle faults. The assigned value represents the percentage of data that can be recovered in case of errors or damage.

- Level L = 7 % of the code words/data can be recovered
- Level M = 15 % of the code words/data can be recovered
- Level Q = 25 % of the code words/data can be recovered
- Level H = 30 % of the code words/data can be recovered

❹ **Max Length**: The maximum length of characters allowed in the QR code is determined by the above settings and cannot be edited.

❺ **Foreground Color:** The Foreground Color of your QR-Code. Simply open the color palette to choose from a range of colors and fine-tune them to match your desired shade.

❻ **Background Color:** The Background Color of your QR-Code. (same options as for the Foreground Color).

❼ **Transparent BG:** If you select this option, the QR code will be transparent and adjust to the background.

Confirm with **OK** and now test it. If you don´t know how to test it, here is more information.

Generated QR Code:

Result:

Scan it with a QR Code Scanner e.g., from your phone. Enjoy the result!

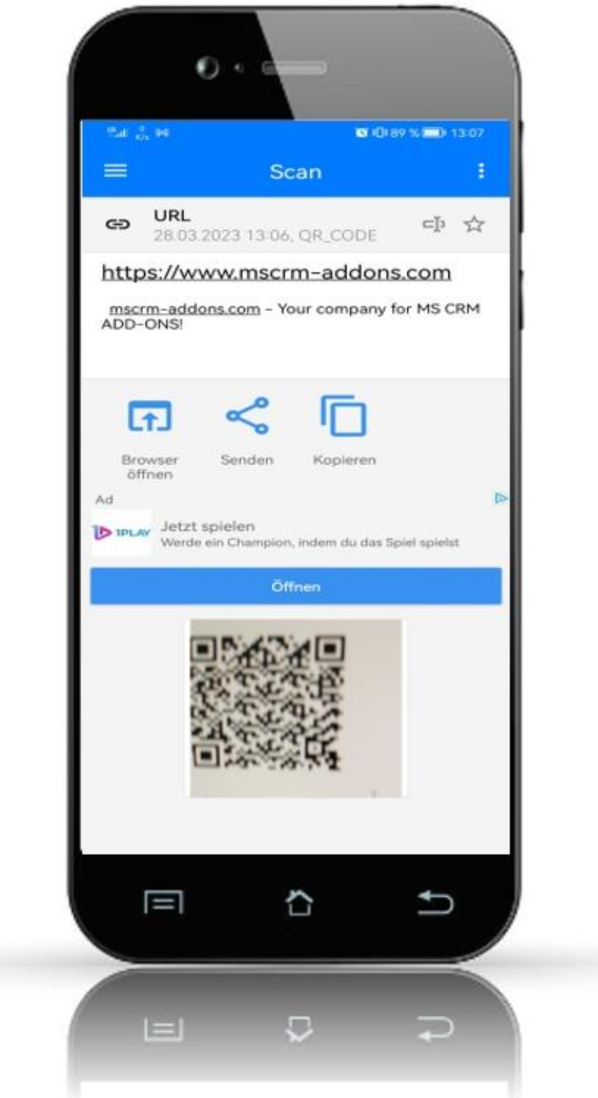


Figure 170: Scan QR Code with a QR Code Reader

6.21. The Advanced String property of the DocumentsCorePack TemplateDesigner

The Advanced String property allows you to define a pattern for a dynamically created string. The following step-by-step description will show you how to set this property in the DocumentsCorePack Template Designer.

The example below shows an advanced string 2 based on a placeholder in a template 1.

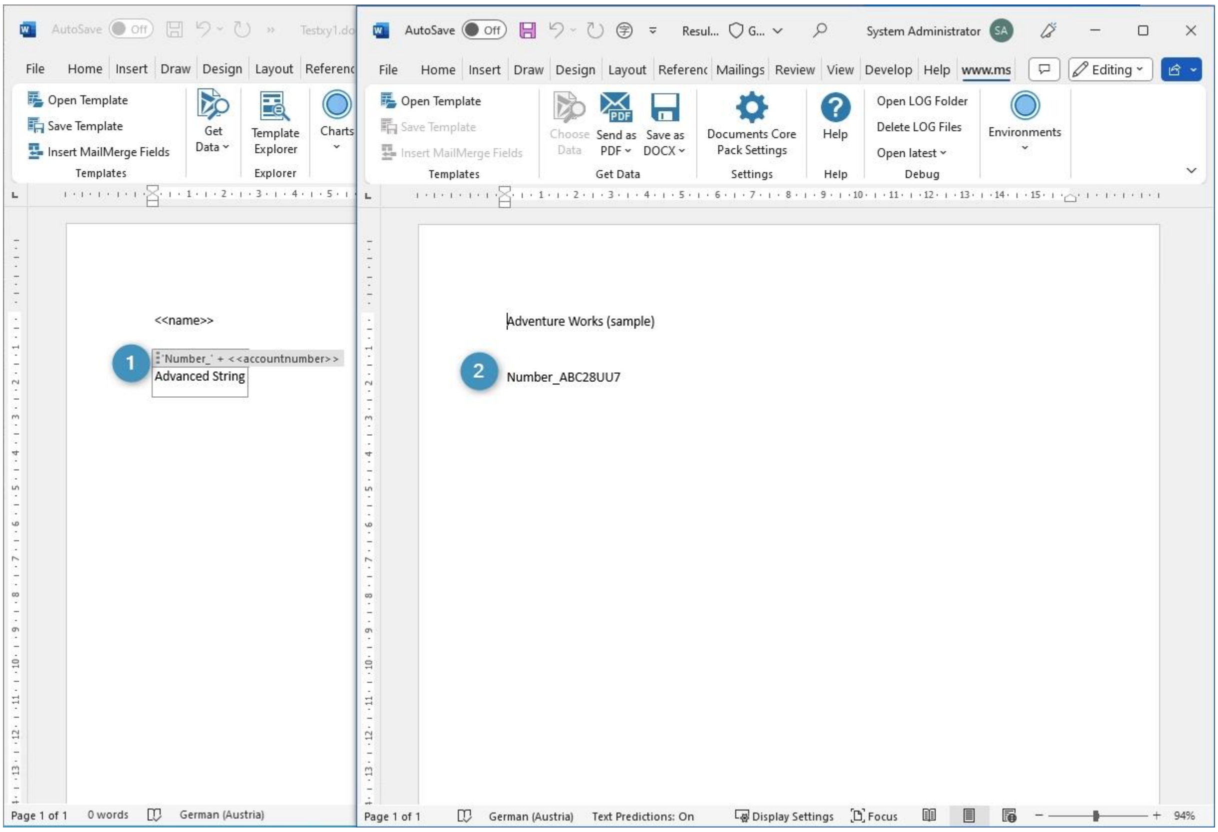


Figure 171: Example of dynamic string

Use the Advanced String option.

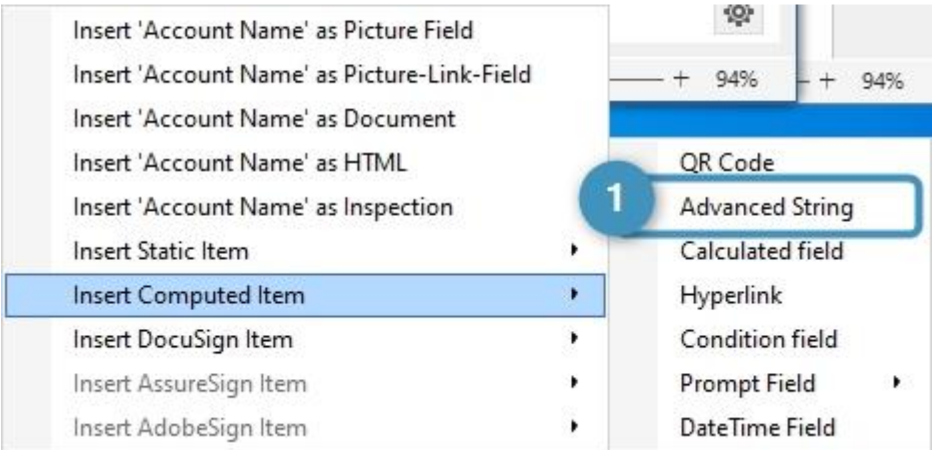


Figure 172: Insert Advanced String

Create your Advanced String by defining your 1 link pattern. The Syntax is described here.

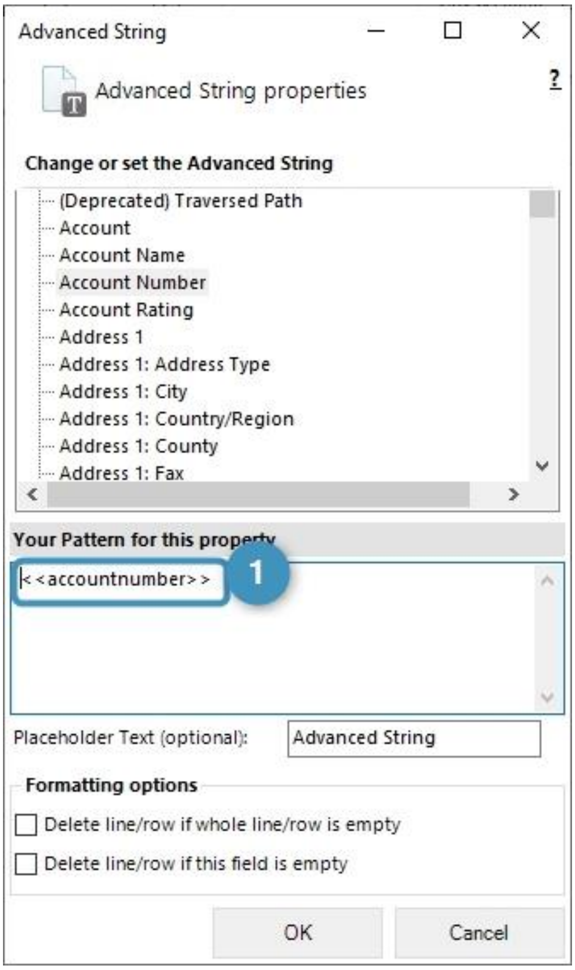


Figure 173: Insert pattern for the Advanced String

Define a placeholder [optional]. You can set a placeholder name 1 for your field so that you can find it easily in case you have to modify your template in the future.

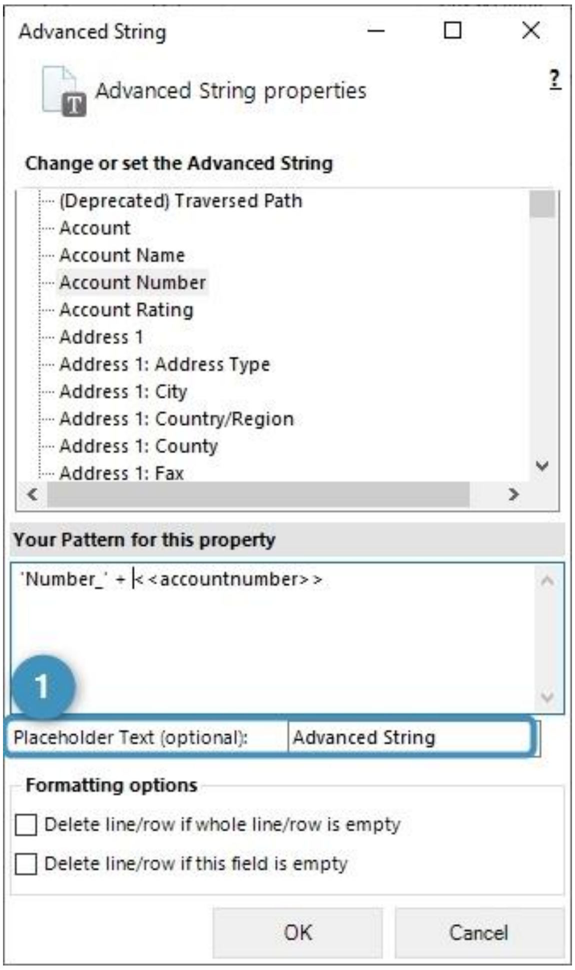


Figure 174: Define a placeholder text

Before you can use or test your template, you must save it. You can either save your template locally with the standard **Save** or **Save as** functionality of Word, or you can use the **Save Template** option of the DCP Template Designer in order to publish the template to Dynamics 365.

6.22. The "Insert Calculated Field" button in DocumentsCorePack

The Computed Field property is a feature that lets you perform calculations using data from Dynamics 365. It's a way to automatically calculate values based on other data in your system, without having to manually perform the calculations yourself.

Learn how to set up a Computed Field in the **DocumentsCorePack TemplateDesigner** for your template.

Step-by-step description

Step 1: Open a Word template and navigate to the 1 **DocumentsCorePack TemplateDesigner** and open the 2 **Insert MailMerge Fields**.

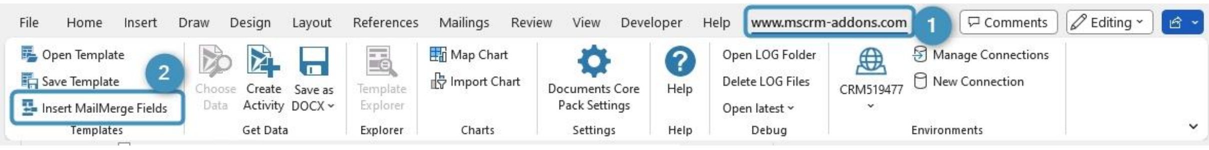


Figure 175:Open the DocumentsCorePack TemplateDesigner

Step 2: Use the 1 **Calculated Field** option.

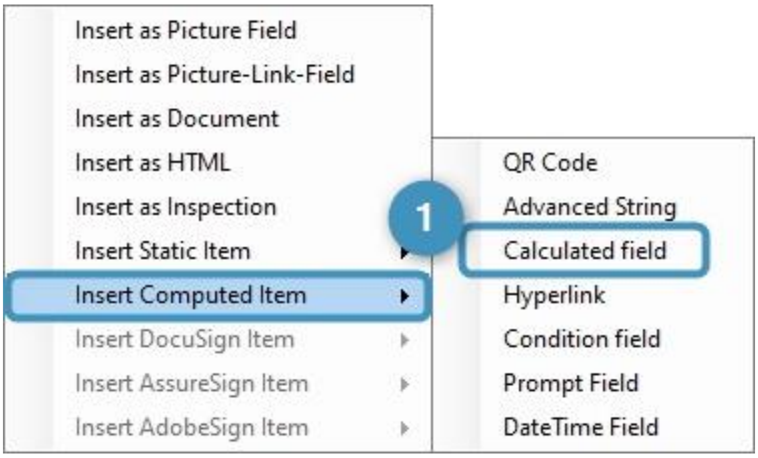


Figure 176: Calculated field option

Step 3: The Computed Field properties window opens. Now create your calculation.

Please note: Adherence to basic arithmetic operations such as addition, subtraction, multiplication, and division is important. Please ensure the formula is syntactically correct and contains all necessary variables and operators to calculate the correct result.

/ = divide
***** = multiply
+ = summate
– = subtract other than the usual DocumentsCorePack syntax, numeric values are added without single quotes.

It is also important to consider the order of operations in the formula to ensure that the result is correct. Parentheses should be used to control the priority of operations (calculations involving multiplication or division should be done before calculations involving addition or subtraction) in the formula and ensure that the formula is executed as intended.

Example: In the following example we want to find out how much the discount in % is. The formula is using parentheses to ensure that the calculation is done correctly.

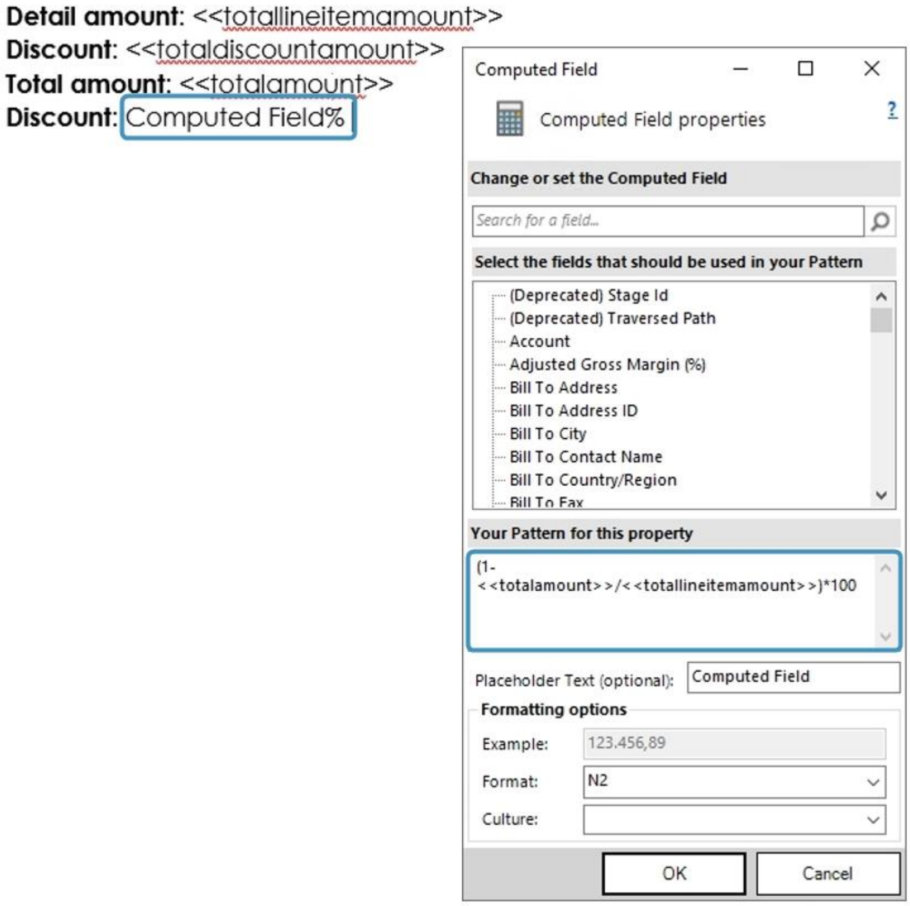


Figure 177: Insert a formula for a Computed field

Result:

Figure 178: Result, set with a correct formula

The syntax is important: Now have a look at the result when the formula is not set correctly (The parenthesis is removed). This can lead to wrong results:

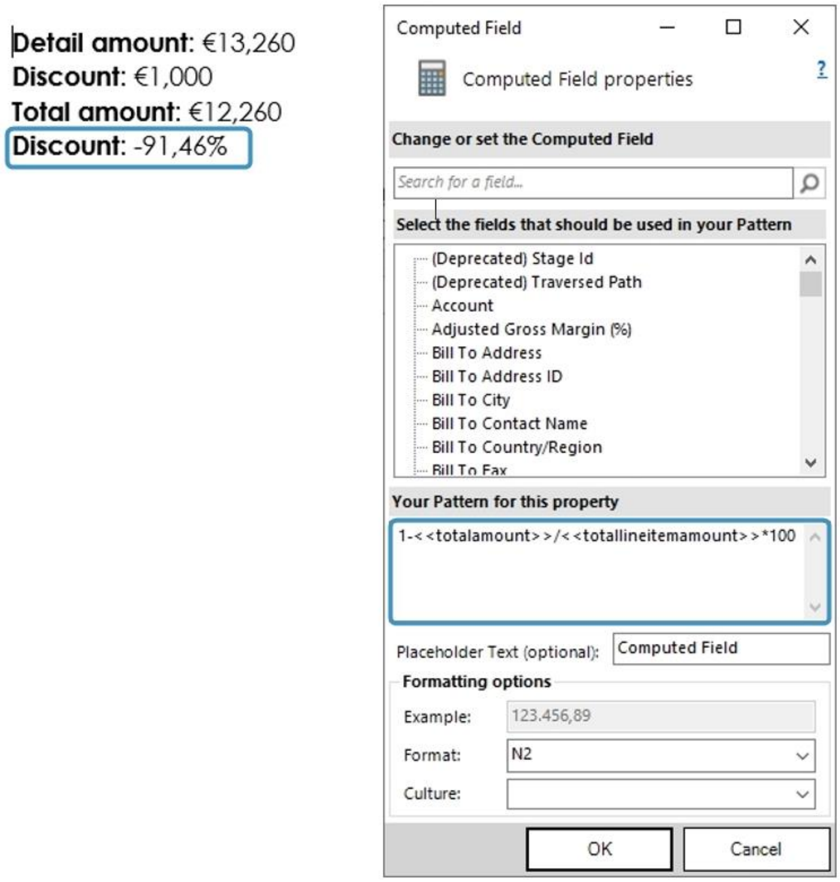


Figure 179: Result when the formula is not set correctly

6.23. Insert Hyperlink with DocumentsCorePack TemplateDesigner

This section describes how to configure dynamic elements inside a Hyperlink using the DocumentsCorePack TemplateDesigner. This allows you to add data from your Dataverse into links placed inside a document.

Please note: Currently, only base types are supported, and taxonomy properties are not supported.

Step-by-step description

Step 1: Open your TemplateDesigner to navigate to the Hyperlink option.
Open the Insert Field dropdown and select the Insert Computed Item option. In the following drop-down, select Hyperlink.

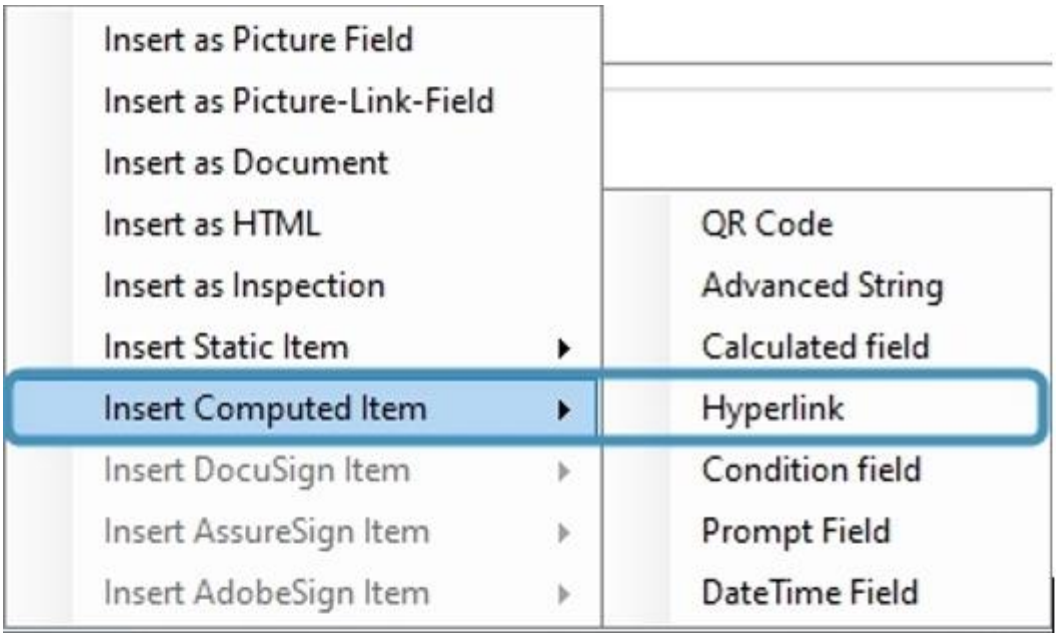


Figure 180: Open the Hyperlink option

A hyperlink consists of a:

- **Link** (address to a website)
- **Displayname** (name to be displayed in the document)

With a click on the **Display Name**, the **Link** will be activated in the background. To keep track of the hyperlink elements in a template, users can define an individual name which will be displayed in the template.

Step 2: Compose your Link. To define the link pattern, navigate to the **Link (Url)** tab.

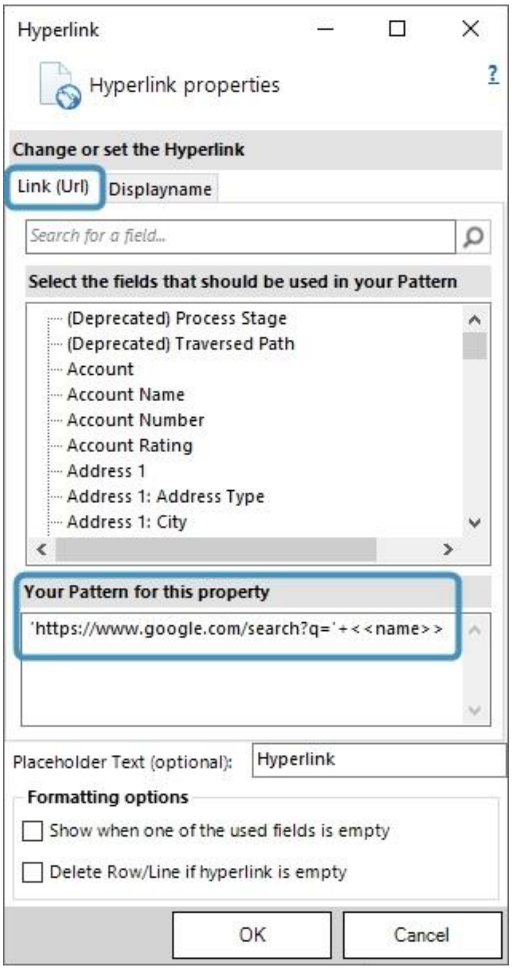


Figure 181: Define your Hyperlink in the Link (Url) tab

Step 3: Compose your Displayname. To set a name for the link, select the **Displayname** tab.

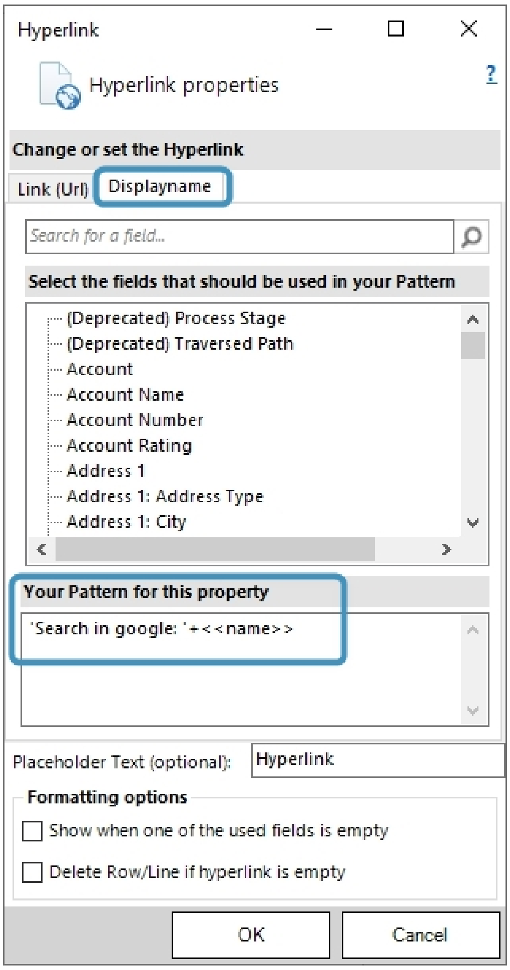


Figure 182: Define your Hyperlink in the Displayname tab

Step 4: There are Additional Options [optional]

❶ Enter a placeholder text **[optional]**. Per default the placeholder text is **Hyperlink**.
❷ There is the possibility to enable the link to be displayed, even when there is no data returned for Dynamics 365 fields.
❸ You can also remove the link completely if there is no data returned.

Figure 183: Additional options in the Hyperlink properties

Step 5: Save and test the template. Once the template is saved, you can go ahead and run tests.

Result:

1. Hyperlink inserted in template.
2. Save template.
3. To test the template, click **Choose Data**.
4. Select the data you want to merge.
5. Result.

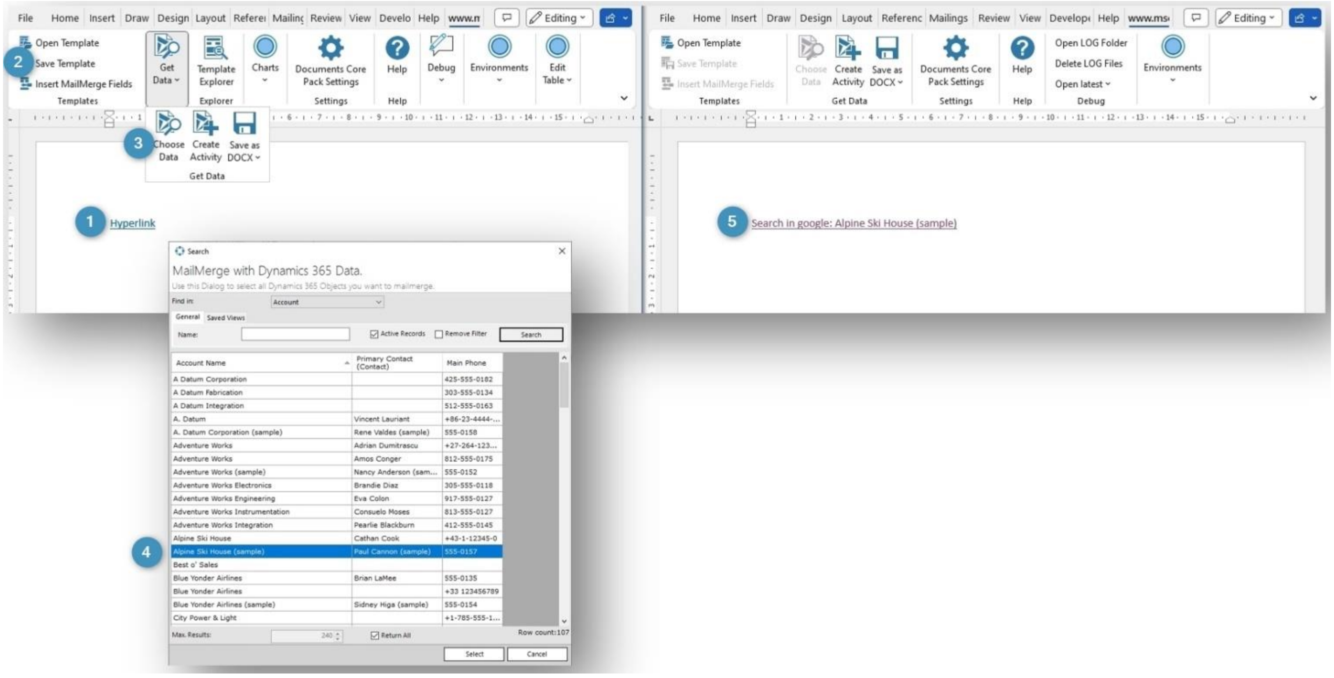


Figure 184: Result

6.23.1 How to modify the Hyperlink style

Easily modify the style of a hyperlink in a DocumentsCorePack template.

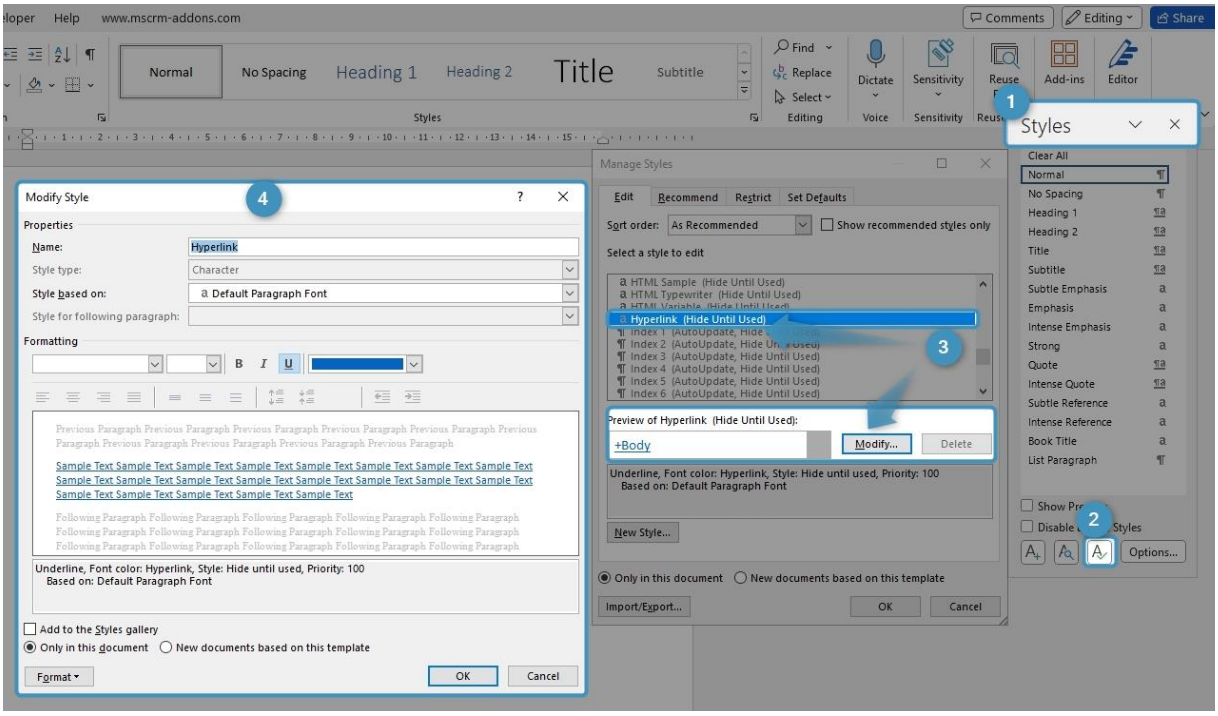


Figure 185: Modify the hyperlink style

Open Microsoft Word and follow the steps below:

1 Open **styles**.
2 Click on **Manage Styles**.
3 Search for the **Hyperlink Style** and click on **Modify**.
4 Change the Hyperlink Style to your liking. Confirm your changes.

6.24. How to insert Condition Fields in DocumentsCorePack Templates

Conditions allow you to define content that is either displayed or removed from the final document based on a certain condition (for example field values in Dynamics 365).

This step-by-step description explains how to set conditions in our DocumentsCorePack TemplateDesigner. In this example, we want to create a quote and choose between "**Mr**" and "**Ms**" depending on the gender of the recipient.

This webinar also covers this topic in detail.

Please note: As well as the method described in this article, Microsoft Word also supports conditions inside documents that can alternatively be used.

Step-by-step description

Step 1: Create a quote template. First, you must create a new template or open an existing one. Once the Word template is open, click the 1 **www.mscrm-addons.com** tab on the top of the Word ribbon and press 2 **Insert MailMerge Fields** to open the TemplateDesigner on the right side. Select the 3 **Insert Field** button.

Please note: Set the 4 cursor at the position where you would like to insert a condition field. In our example, we want to set the condition in the subject line after "**Dear**" choosing between "**Mr**" and "**Ms**" based on the recipient, as you can see below.

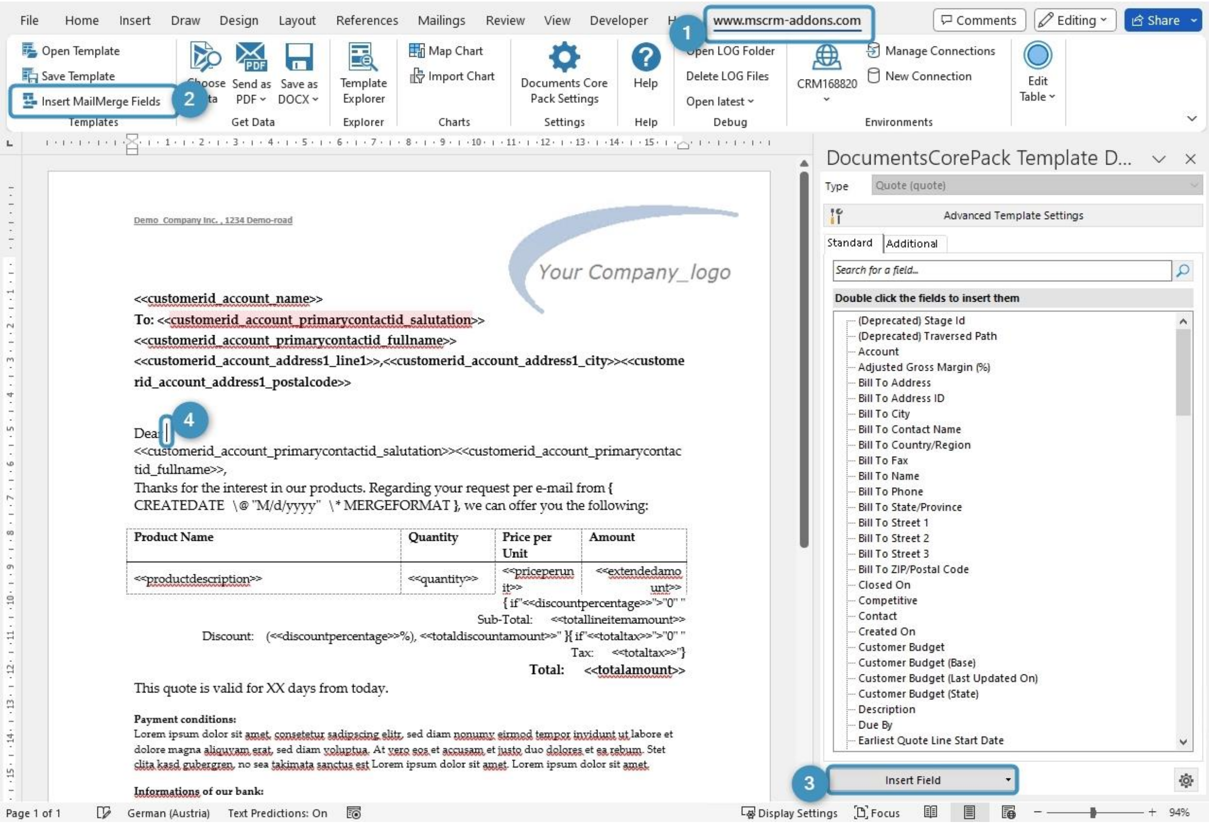


Figure 186: Quote template

Step 2: Use the Condition field option. Press the ③ **Insert Field** button. Select **Insert Computed Item** and then **Condition field**.

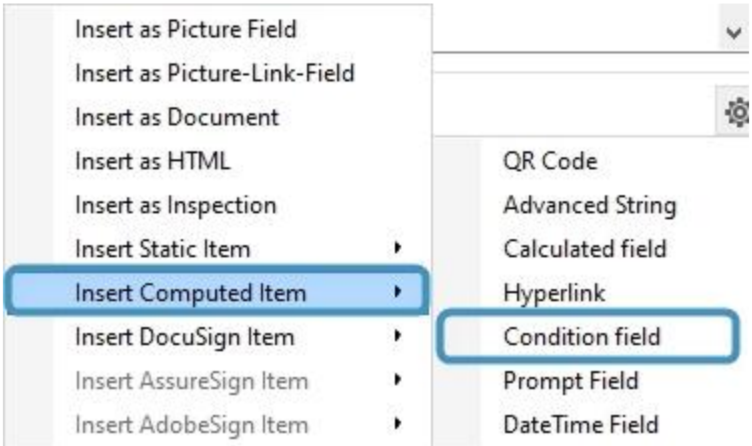


Figure 187: Insert Condition field

Step 3: Configure the setup of your condition fields. The Condition Field window opens. For further steps:

① Give your condition a descriptive name. It makes it easy to re-use existing conditions in a template.

➋ Enable the creation of an **ELSE** block and define the layout of the inserted condition fields, which in in this case is next to each other.

➌ Use the condition designer to create your condition. In this example, we want to create the condition for the entity **Potential Customer (Contact)**. We want our condition to choose between "**Mr**" and "**Ms**" depending on the gender of the recipient. Therefore, we select in the first drop-down menu the field **Gender** and the operator as **equals**. Depending on the data type of the field, you have an additional control that opens a new dialog to select the compare value, which in this case is male.

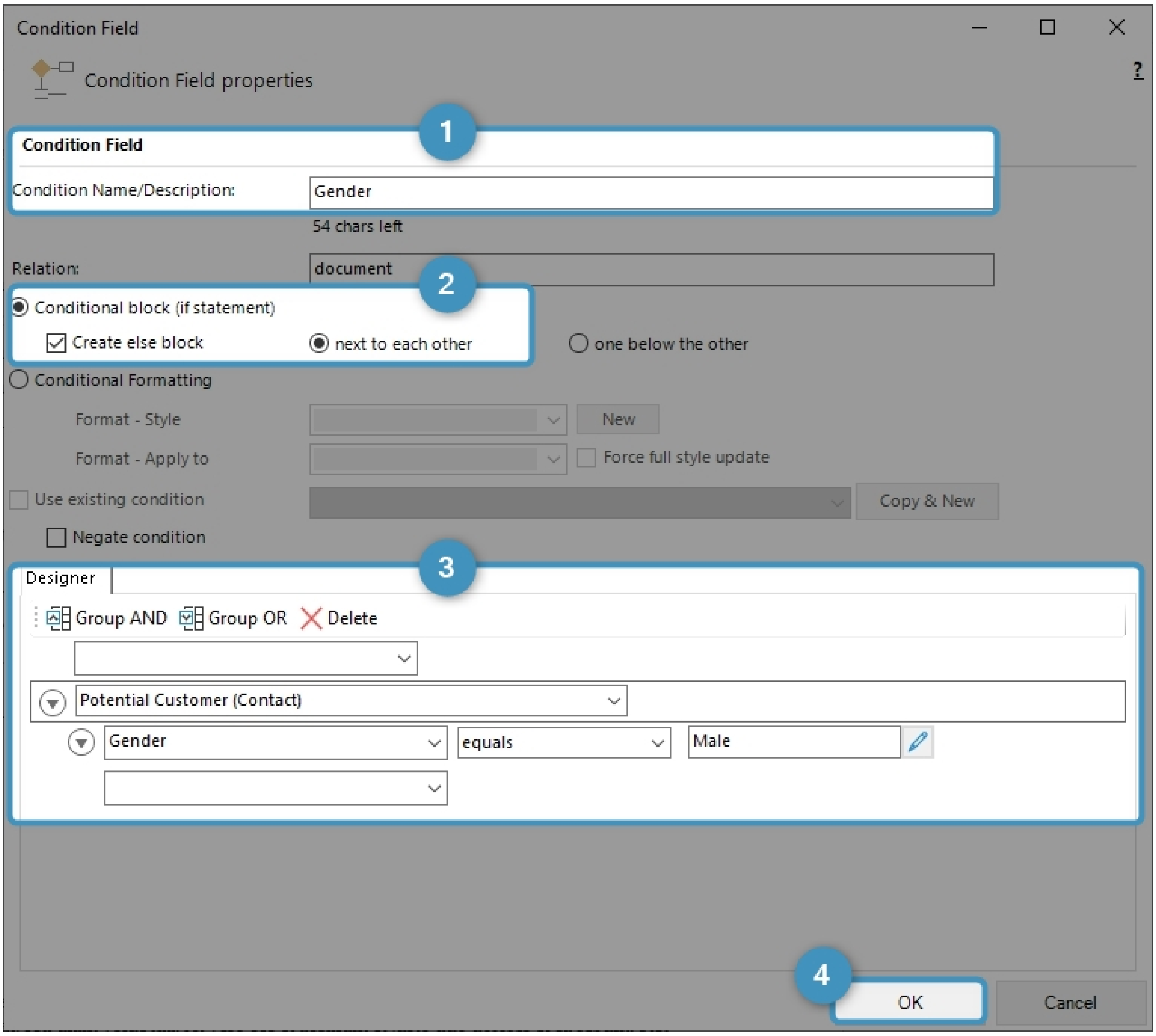


Figure 188: Configure your condition

In your template, you can see placeholders for the formatting options next to each other. Because you selected to insert an **ELSE** block, you have the second placeholder, as you can see in the figure below.


Gender
Dear Please enter the content IF your condition is metPlease enter the content IF your condition is NOT met
<<customerid_account_primarycontactid_fullname>>,

Figure 189: Appearance of the fields in the template

Step 4: Set your custom text block. Within these placeholders, you can now enter the content of your conditions. In this example, **IF** Gender equals to Male it should display "**Mr**" and ELSE "**Ms**".

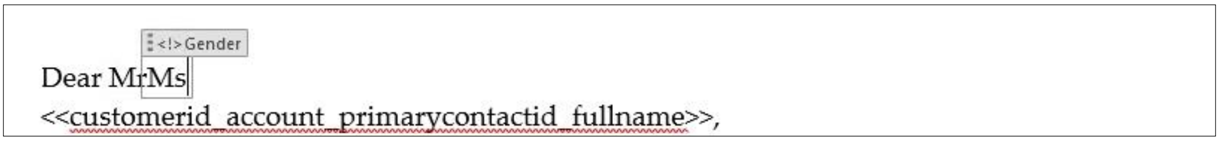

<!>Gender
Dear MrMs
<<customerid_account_primarycontactid_fullname>>,

Figure 190: if and else block filled with content

Step 5: Save your template. Before you can use or test your template, you must save it. Use the **Save Template** option of the DocumentsCorePack TemplateDesigner to publish the template to Dynamics 365.

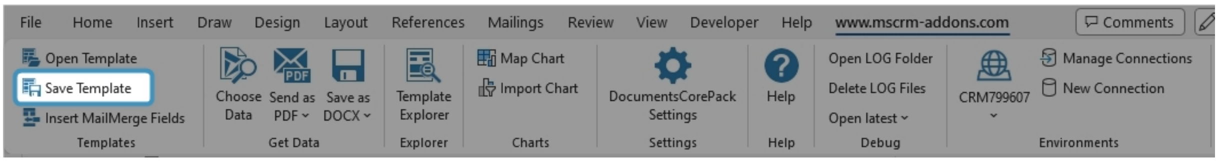


Figure 191: Save template option

After merging your template, you can see the result of your created template containing the set condition (highlighted).


Demo_Company Inc., 1234 Demo-road

Your Company_logo

Fabrikam, Inc. (sample)
To: Maria Campbell (sample)
7995 Edwards Ave.Lynnwood58299

Dear Ms Maria Campbell (sample),

Thanks for the interest in our products. Regarding your request per e-mail from 1/12/2022, we can offer you the following:

Product Name	Quantity	Price per Unit	Amount

Figure 192: Successfully executed condition

6.24.1 Condition Designer (Dynamics 365)

The Condition Designer has similar options to the standard **Advanced Find** dialog in Dynamics 365.

Conditions allow you to define content that is either displayed or removed from the final document based on a certain condition (for example field values in Dynamics 365).

The Condition Designer 1 is part of the **Condition Field** functionality of DocumentsCorePack.

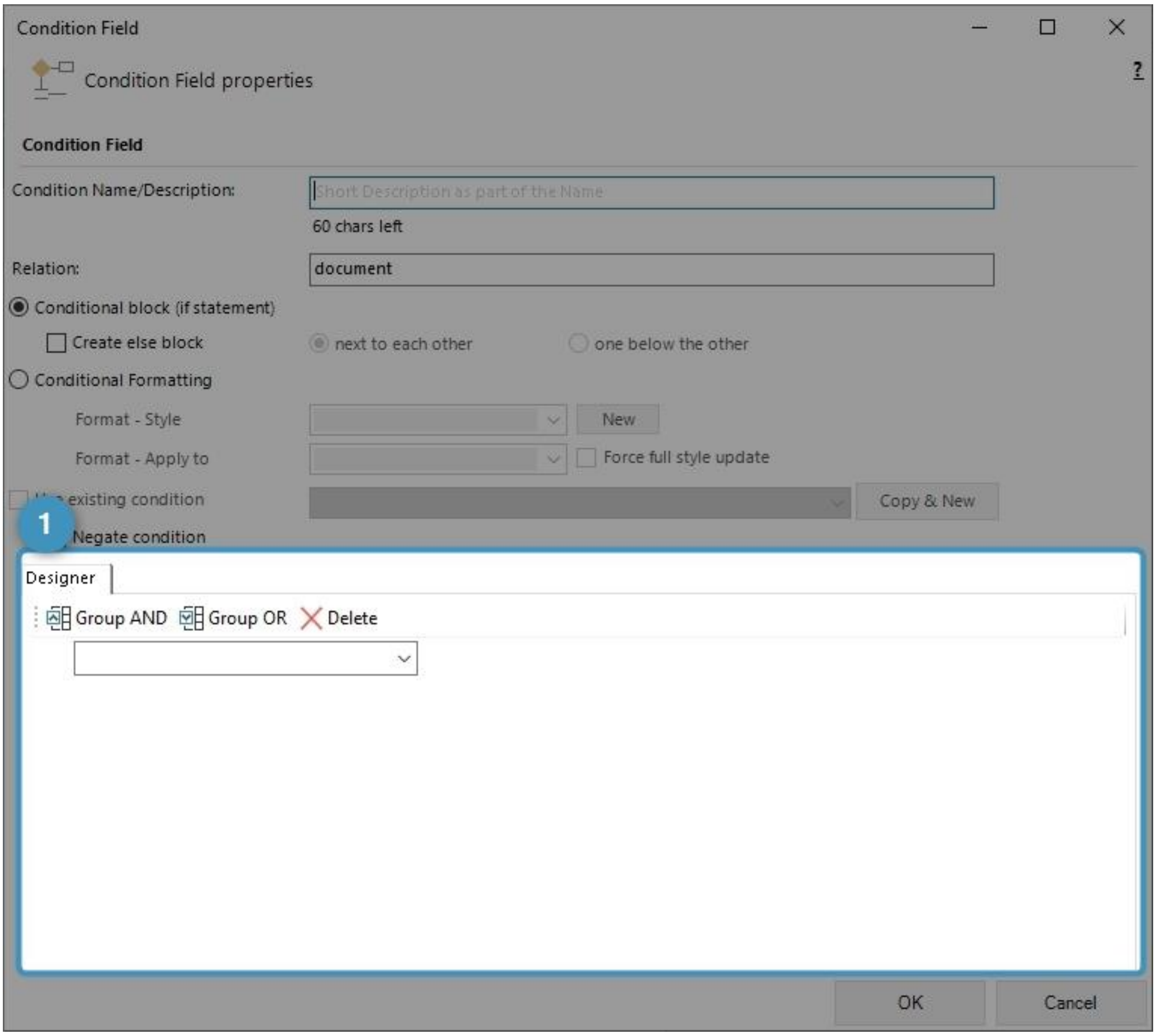


Figure 193: The condition designer within the condition field dialog

Step-by-step description

Step 1: Select a field from the drop-down.

Figure 194: Select a field

Step 2: Select an operator. Depending on the field type, you will see different available operators.

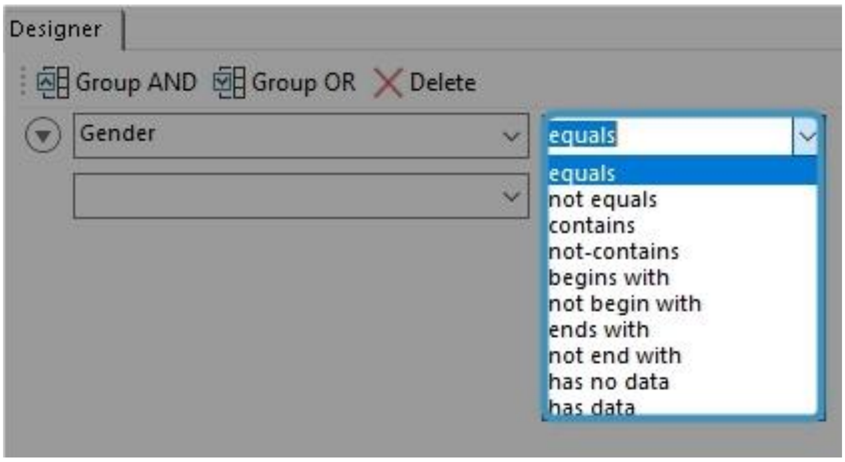


Figure 195: Operator selection

Step 3: Select or enter a compare value. Depending on the field's data type, you will either have an additional control that opens a new dialog 2 to select the compare value, or you can enter the value directly by typing.

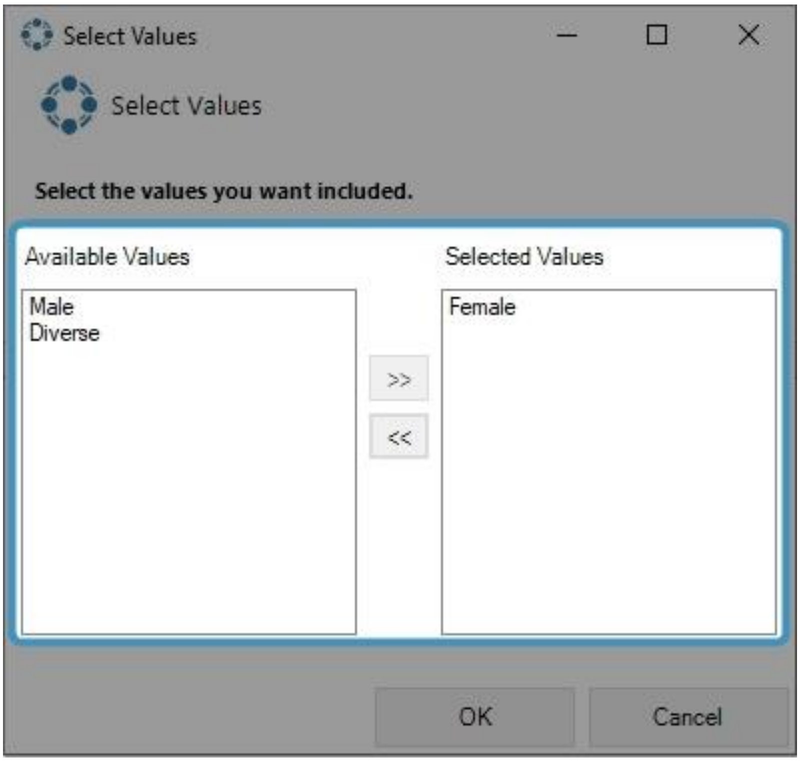


Figure 196: Selection dialog for picklist elements

Step 4: Examples of other data types.

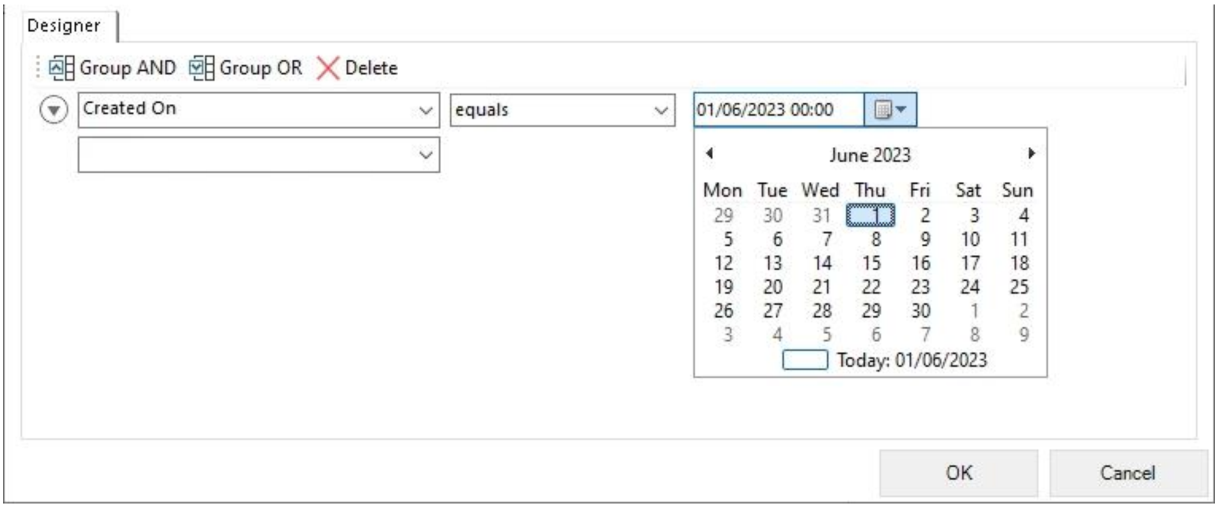


Figure 197: Example of a date field

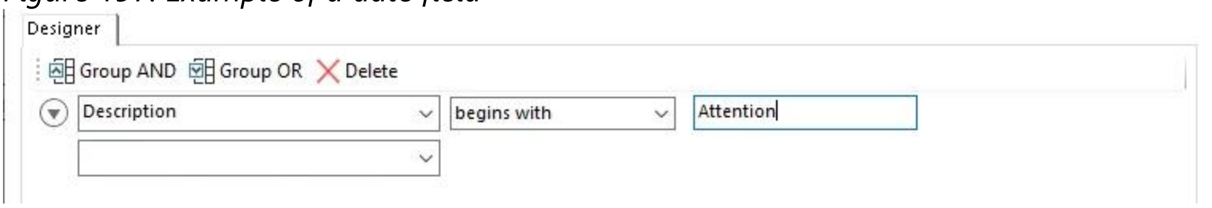


Figure 198: Example of a string field

Step 5: Repeat steps 1 – 3 to add other lines to set up more complex conditions.

Please note: All single lines are brought together to one single condition.

Step 6: Group your lines (Optional). Select the required rows from the menu.

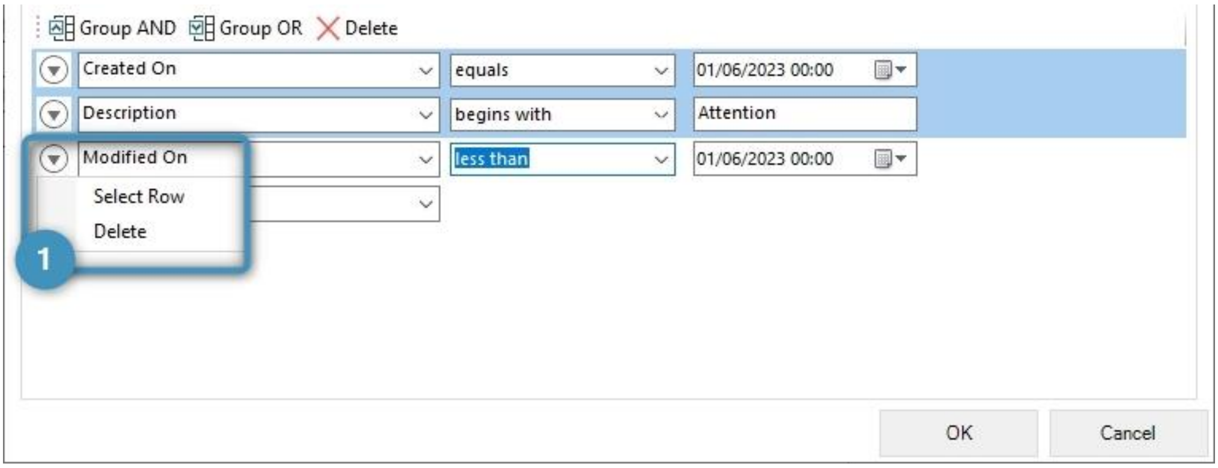


Figure 199: The selected rows will stay highlighted (1).

Step 7: Select the required 1 grouping option**.**

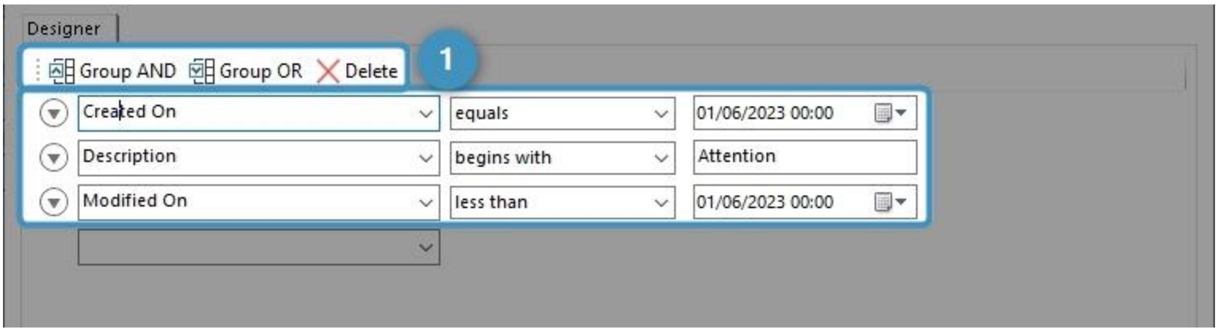


Figure 200: Grouping option with three rows

Step 8: After selecting the grouping, a box will visually show the grouping

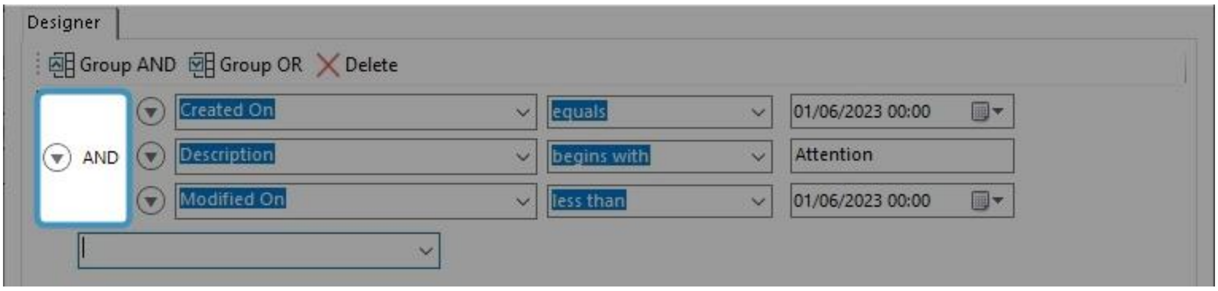


Figure 201: Result after grouping

Please note: A few fields like **Owner** and **Customer** (special lookup fields) are not available on the actual parent level but can always be reached by selecting the next level drop-down for this element.

6.24.2 Conditional Formatting

Conditional Formatting is an enhanced component of the Condition feature within DocumentsCorePack. While the regular Condition functionality determines whether to include or exclude a field in your document, the conditional formatting preserves the existing format or applies an alternative format based on a Word style sheet.

Requirements:

Available from version

- **DocumentsCorePack**: 2017.169
- **DocumentsCorePack Template Designer**: 9.24

Step-by-step description

Step 1: Insert a new Condition Field.

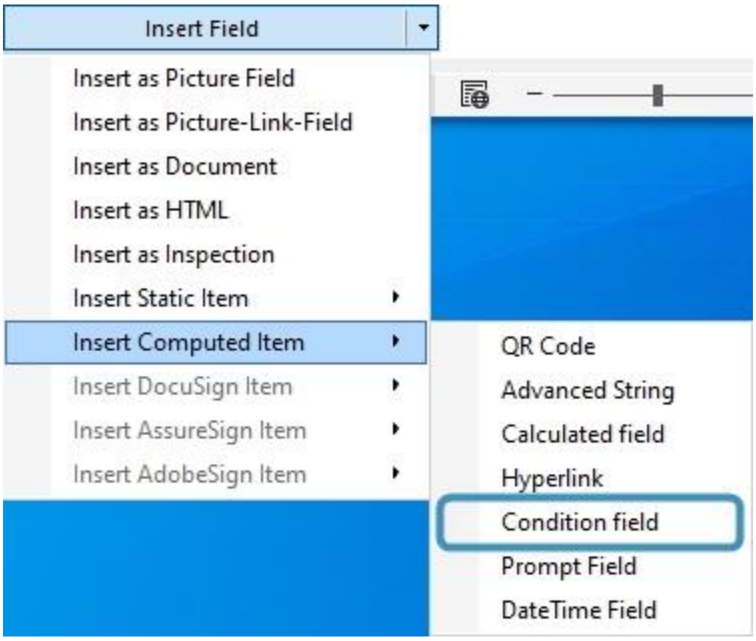


Figure 202: Insert Condition Field

Step 2: Give your condition a descriptive name. A descriptive name makes it easy to locate and reuse existing conditions in a template.

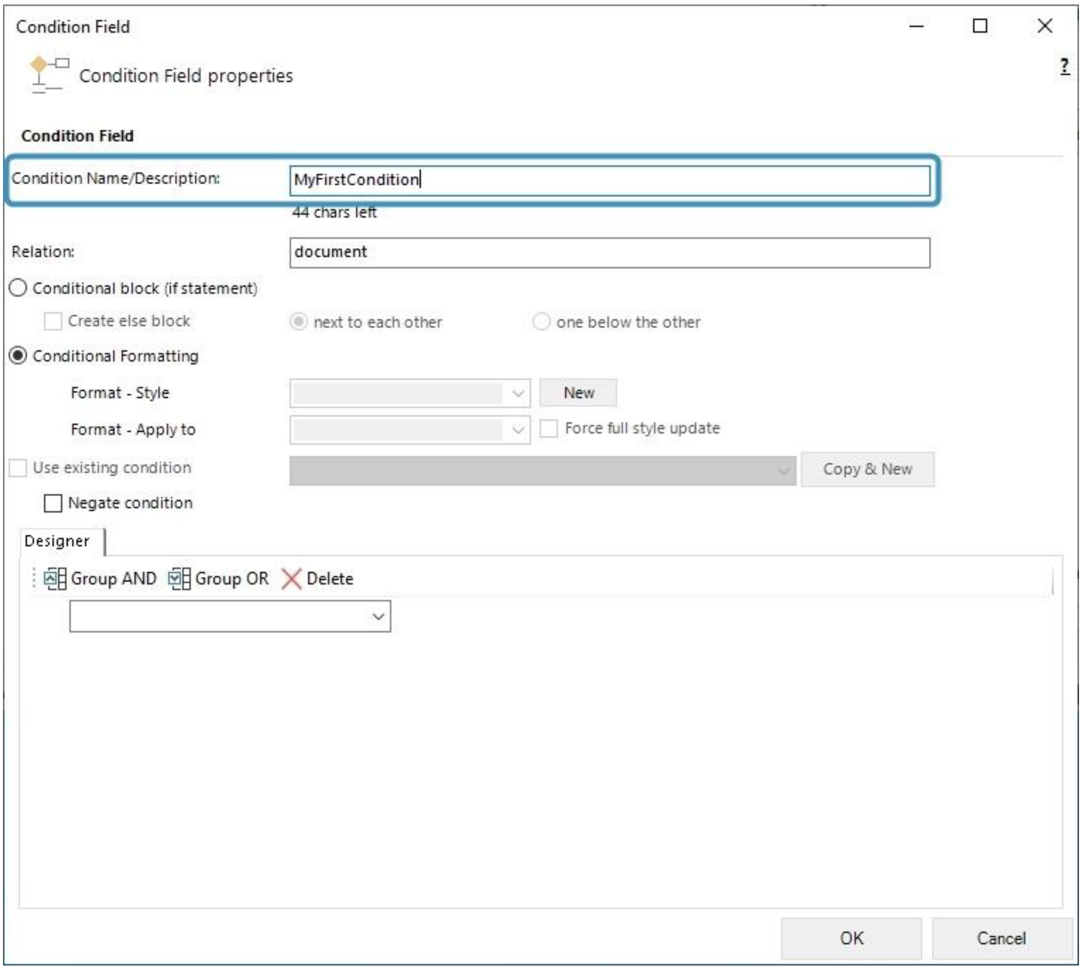


Figure 203: Condition field dialog

Step 3: Select Conditional Formatting. You have to switch the condition type from the Conditional Block (if statement) to Conditional Formatting.

Please note: If you do not see this option, ensure that you have the required version installed. How to check your current version is described here.

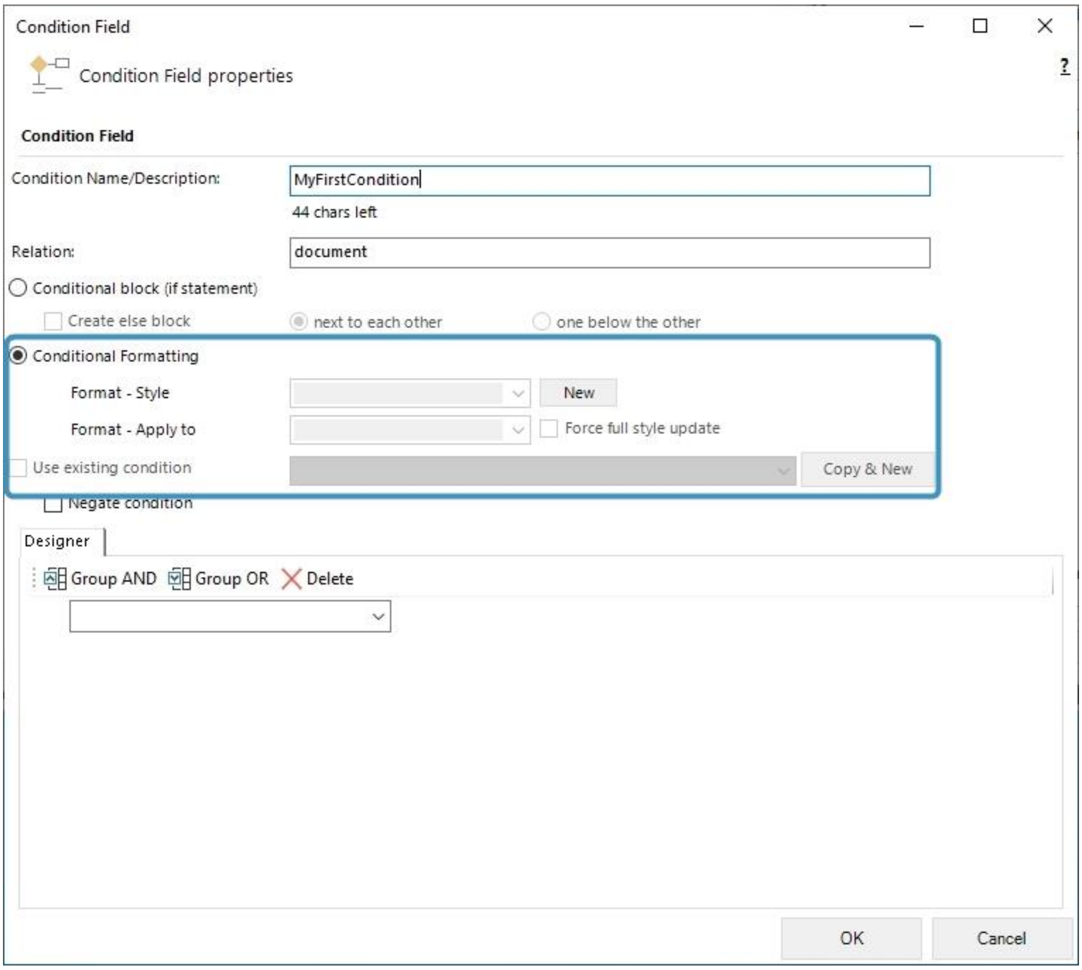


Figure 204: Conditional Formatting

Step 4: After you have selected **Conditional Formatting**, you can use the style selection. You can only use custom styles in this selection, so if the drop-down is not enabled, you must create at least one new style. How to do so is described in the next step.

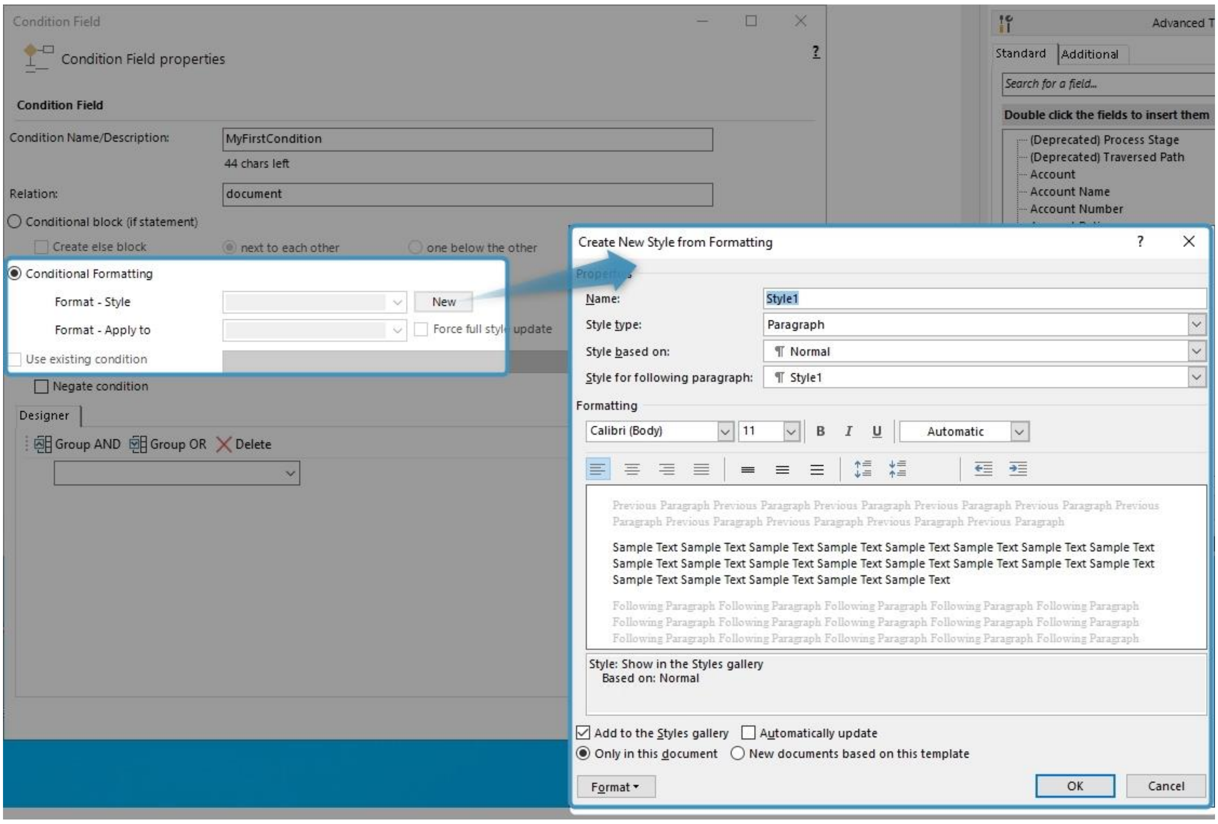


Figure 205: Style selection section

Step 5: Create a new style. This will bring up the standard Word **Create New Style from Formatting** dialog.

❶ **Name:** Please define a name that will indicate what this style is used for. (You can reuse styles for all your conditions, and defining a name for each will make it easier to reuse them.)

❷ **Style type:** This is one of the most important steps during the creation of a style. Within this selection field, you have 5 options to choose from, but we support the following 3.

- **Paragraph:** The style will be applied to the whole paragraph that contains this condition field.
- **Character:** The style will be applied to the content within this condition field.
- **Table:** This style type will enable the second selected field [Format – Apply to], where you can decide how it should be applied.

❸ **Style based on:** A base style template can be selected to begin creating the custom style. You can use the three settings as well as all the given options to create your desired output style. After you have selected your desired style, click **OK** to save it.

Please note:

- Do not change the Stylename. We have no option to identify a change of the name and the condition will no longer be able to find the style.
- Not all options available in the standard style sheet configuration of Word are applicable and may not be applied, depending on the used style and the context.

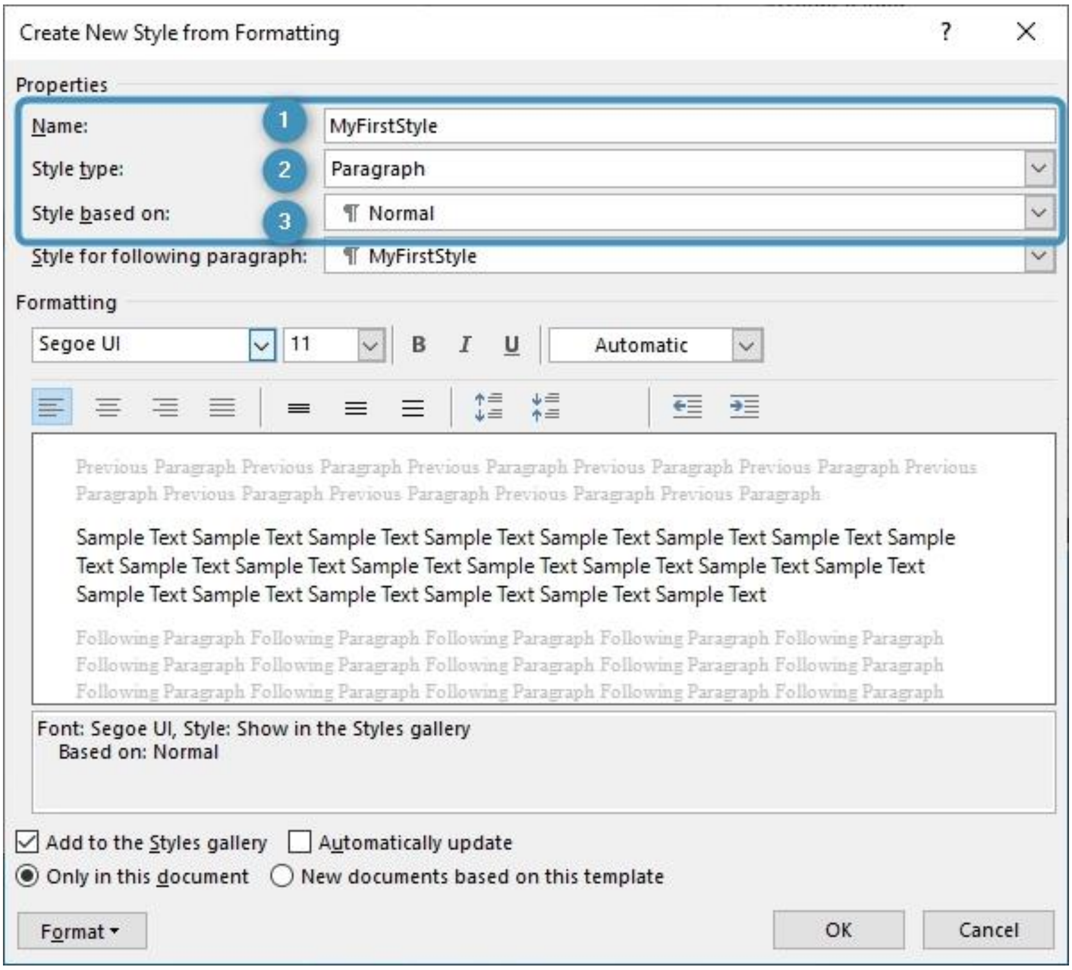


Figure 206: Create a new style

Step 6: Select your Style. Once you have created your style, the **Format – Style** selection is now enabled.

Choose your style, and your conditional formatting field is ready to use. **A character** should be used when you want to apply the format to a single word in a paragraph, while a **Paragraph** should be used when you want to apply the formatting to the whole paragraph.

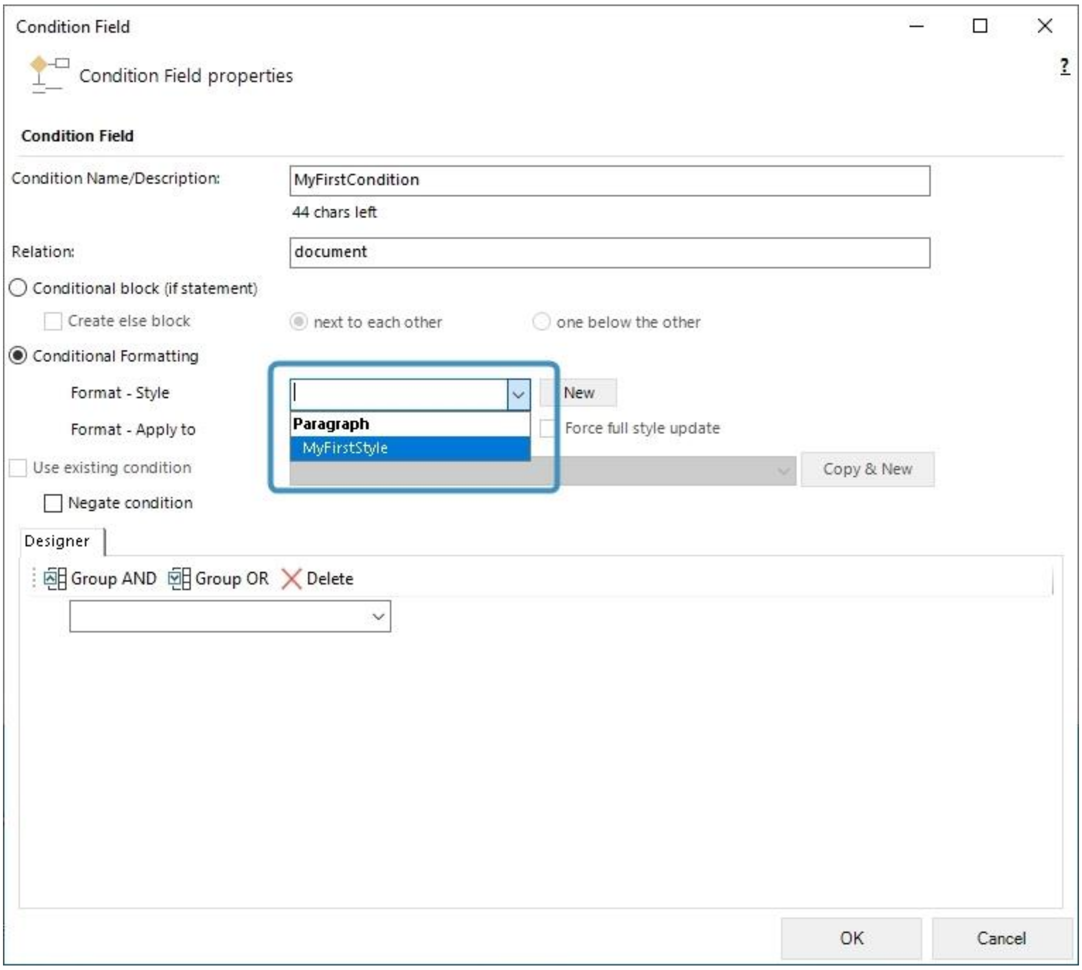


Figure 207: Select Style

Step 7: Apply table format. If your selected style is a table style the **Format – Apply to** field is enabled. This provides you with the option to pick one out of four ways for how your table style should be applied.

- **First Table Inside Field:** This option will apply your style to the first table within your condition field.
- **Parent Table:** When your condition field is within a table, this option will apply the style to this table.
- **Parent Cell:** The selected style will be applied to the cell which contains your condition field.
- **Parent Row:** The selected style will be applied to the row which contains your condition field.

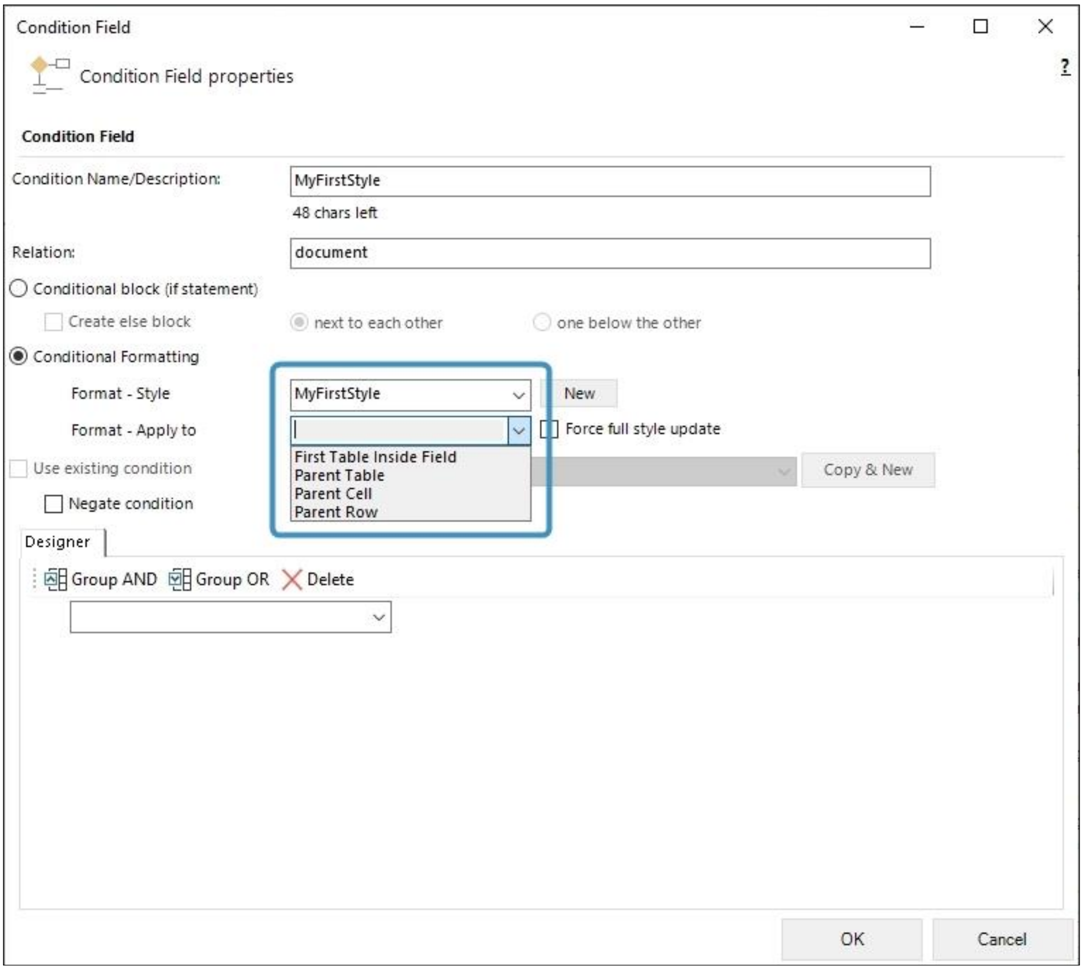


Figure 208: 'Format - Apply to' – field

Step 8: Please click on **OK** to insert the condition field.

6.24.3 How to use conditional formatting for tables

Conditional formatting can help make patterns and trends in your data more apparent. With the DocumentsCorePack condition fields, it is possible to apply different table styles based on conditions.

Step-by-step description

Step 1: For adding conditional formatting to an existing table, you have to first click in the table cell where you want to change the formatting.

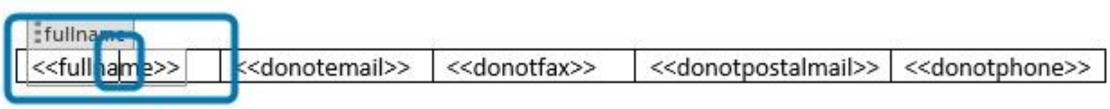


Figure 209: Click in table cell to change formatting

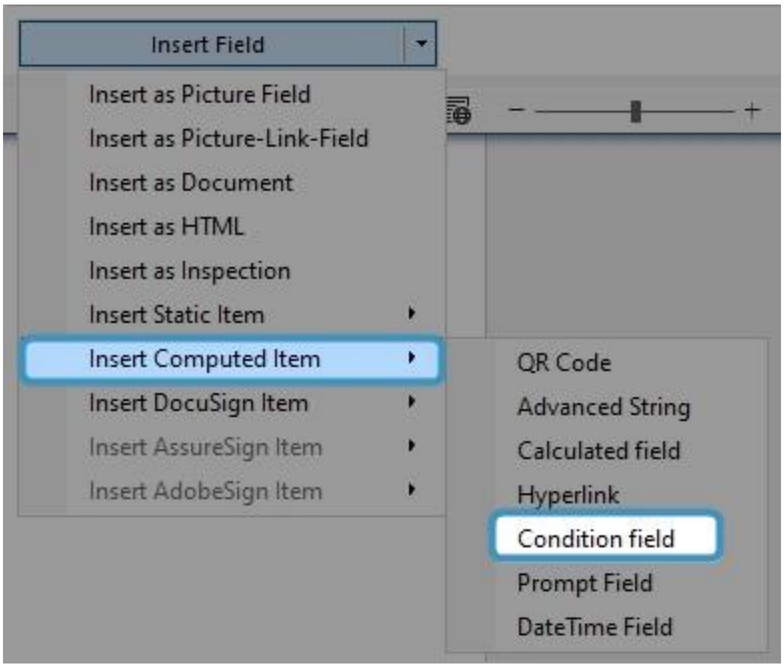


Figure 210: How to access Conditional Formatting option

Step 2. Then in the dialog for the condition field, select the option **Conditional Formatting** and press the **New** button.

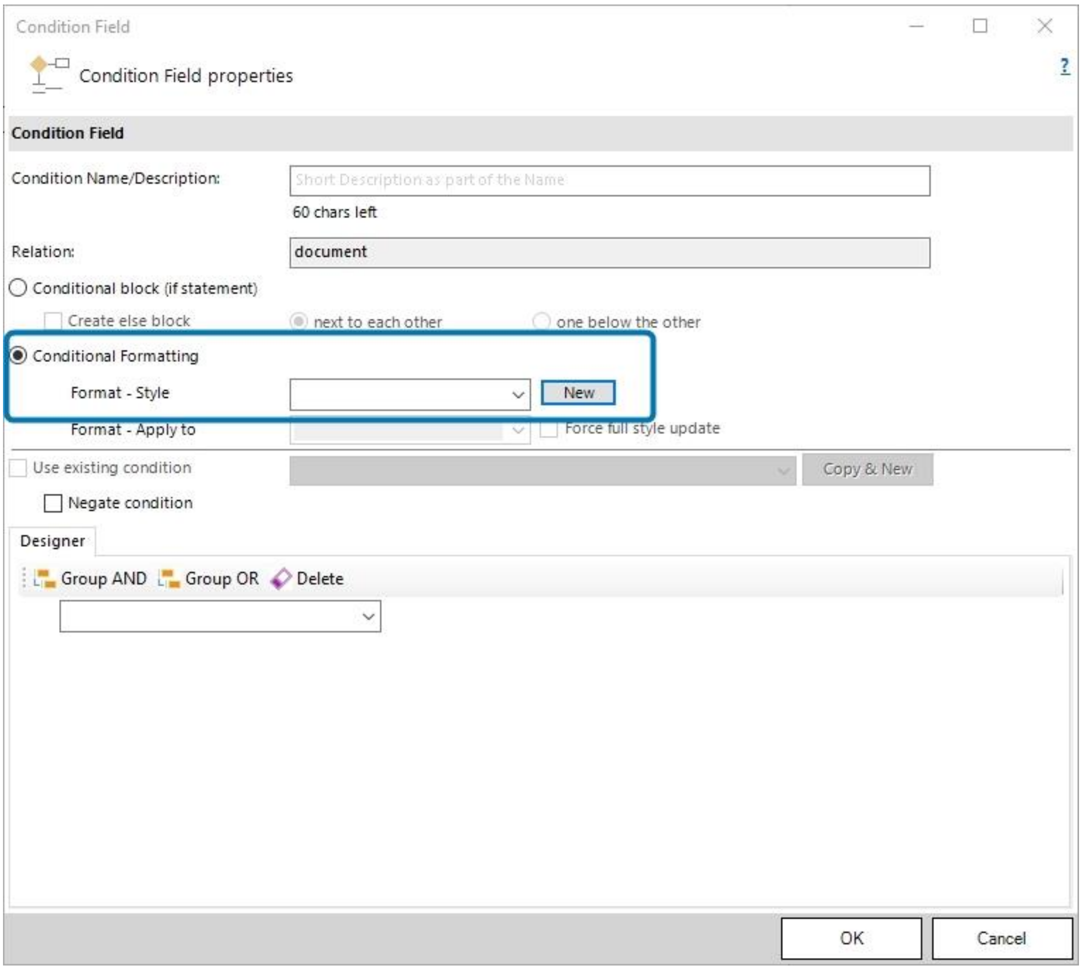


Figure 211: Conditional Formatting

Step 3: Next, create a new table style or select one of the already existing table styles. **Please note:** If you want to change only the row or the cell formatting, please make the changes on the whole table style.

Step 4. There are four options to apply to the selected table style:

1. First Table Inside Field
2. Parent Table
3. Parent Cell
4. Parent Row

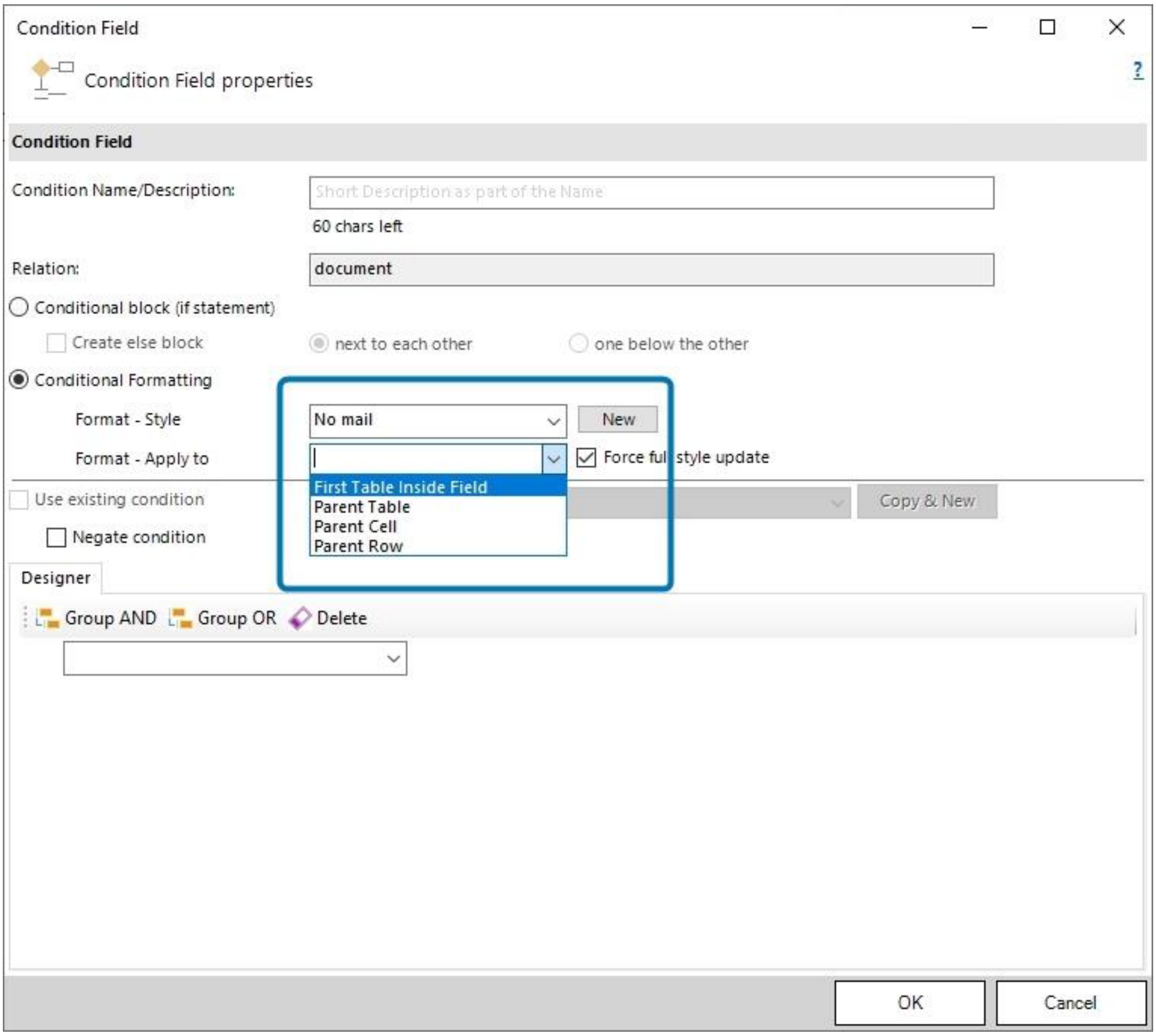


Figure 212: Four options to apply the selected table style

1 Apply to First Table Inside Field

This option only allows you to format the whole table.

2 Apply to Parent Table

The whole table style will be applied to your table. Each of the example styles will work with this option.

3 Apply to Parent Row

This option allows to change the formatting of the row, where the condition field is placed. For example, coloring a row to red or changing the text font to highlight the row.

Without the option **Force Full style update**, the header cell style and table style 2 will not work because only the style applied to the whole table will work. With the option **Force Full style update**, all formatting changes set in the table style will apply to the current row.

You can see the difference in Figure 5: The text formatting and other style details are missing without the option.

Table style1 – apply to row – no Force full style update

Name	Email	Fax	Mail	Phone
Max White	Do Not Allow	Allow	Allow	Allow
Jack Black	Allow	Do Not Allow	Allow	Allow
Johny Red	Allow	Allow	Allow	Do Not Allow
Frank Stro	Allow	Allow	Do Not Allow	Allow
Luis Muster	Do Not Allow	Allow	Allow	Allow
Dan Flen	Do Not Allow	Allow	Allow	Allow

Table style1 – apply to row – Force full style update

Name	Email	Fax	Mail	Phone
Max White	**Do Not Allow**	**Allow**	**Allow**	**Allow**
Jack Black	Allow	Do Not Allow	Allow	Allow
Johny Red	Allow	Allow	Allow	Do Not Allow
Frank Stro	Allow	Allow	Do Not Allow	Allow
Luis Muster	**Do Not Allow**	**Allow**	**Allow**	**Allow**
Dan Flen	**Do Not Allow**	**Allow**	**Allow**	**Allow**

Figure 213: No ForceFullStyleUpdate vs. ForceFullStyleUpdate

4 Apply to Parent Cell

This option allows to change the cell formatting.

Without the option **Force Full style update**, the header cell style and table style 2 will not work because only the style applied to the whole table will work. With the option **Force Full style update**, all formatting changes set in the table style will apply to the current cell.

Table style1 – apply to cell – no Force full style update

Name	Email	Fax	Mail	Phone
Max White	Do Not Allow	Allow	Allow	Allow
Jack Black	Allow	Do Not Allow	Allow	Allow
Johny Red	Allow	Allow	Allow	Do Not Allow
Frank Stro	Allow	Allow	Do Not Allow	Allow
Luis Muster	Do Not Allow	Allow	Allow	Allow
Dan Flen	Do Not Allow	Allow	Allow	Allow

Table style1 – apply to cell – Force full style update

Name	Email	Fax	Mail	Phone
Max White	**Do Not Allow**	Allow	Allow	Allow
Jack Black	Allow	Do Not Allow	Allow	Allow
Johny Red	Allow	Allow	Allow	Do Not Allow
Frank Stro	Allow	Allow	Do Not Allow	Allow
Luis Muster	**Do Not Allow**	Allow	Allow	Allow

Figure 214: No ForceFullStyleUpdate vs. ForceFullStyleUpdate

6.24.4 The "Insert Computed Item" formatting options for number and money fields

This article outlines the **formatting options for number and money fields** within the **Insert Computed Field** function.

The **Insert Computed Field** button allows you to make basic arithmetical operations with **CRM number and money fields**.

Requirements: DocumentsCorePack for MS CRM 2013, v6.11 and higher. All of our add-ons come with an unlimited 14 days free trial. Click here to download and test it.

Add an **Insert Computed Item** field. In this example, it is the **Calculated Field** to show the formatting options for the number and money fields.

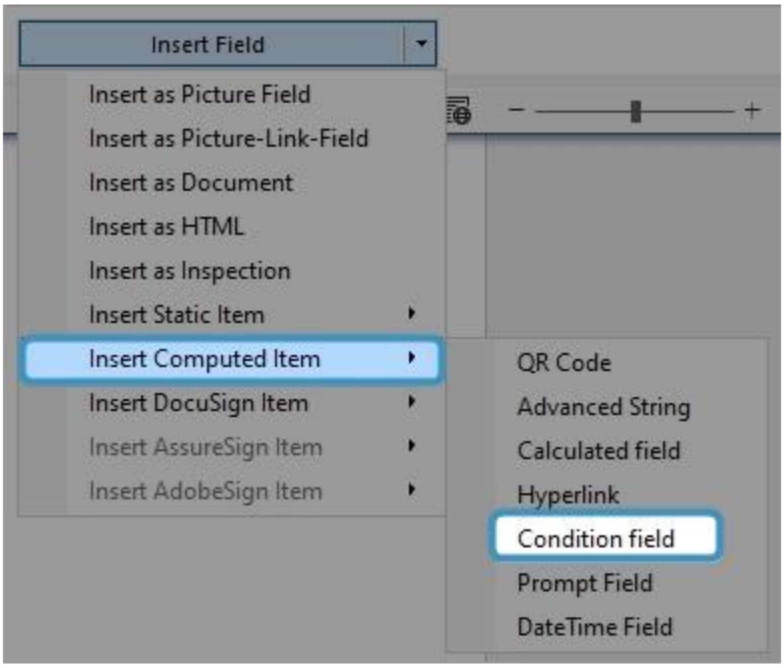


Figure 215: Computed Item - Calculated field

The 1 **Computed Field properties** window opens. In this window, you can 2 change or set the **Computed Field**, 3 select the fields that should be used in your pattern or 4 define your pattern.

You can also select a 5 **Format,** the way in which the result of the calculation is presented or displayed. It specifies the appearance, structure, and style of the calculated value. Choose between the standard formats. The drop-down shows you all of them.

And the 6 **Culture**. The Culture Info represents information about a specific culture including the names of the culture, the writing system, and the calendar used, as well as access to culture-specific objects that provide information for common operations, such as formatting dates and sorting strings. Click the drop-down to see more.

It is also possible to set a Placeholder Text.

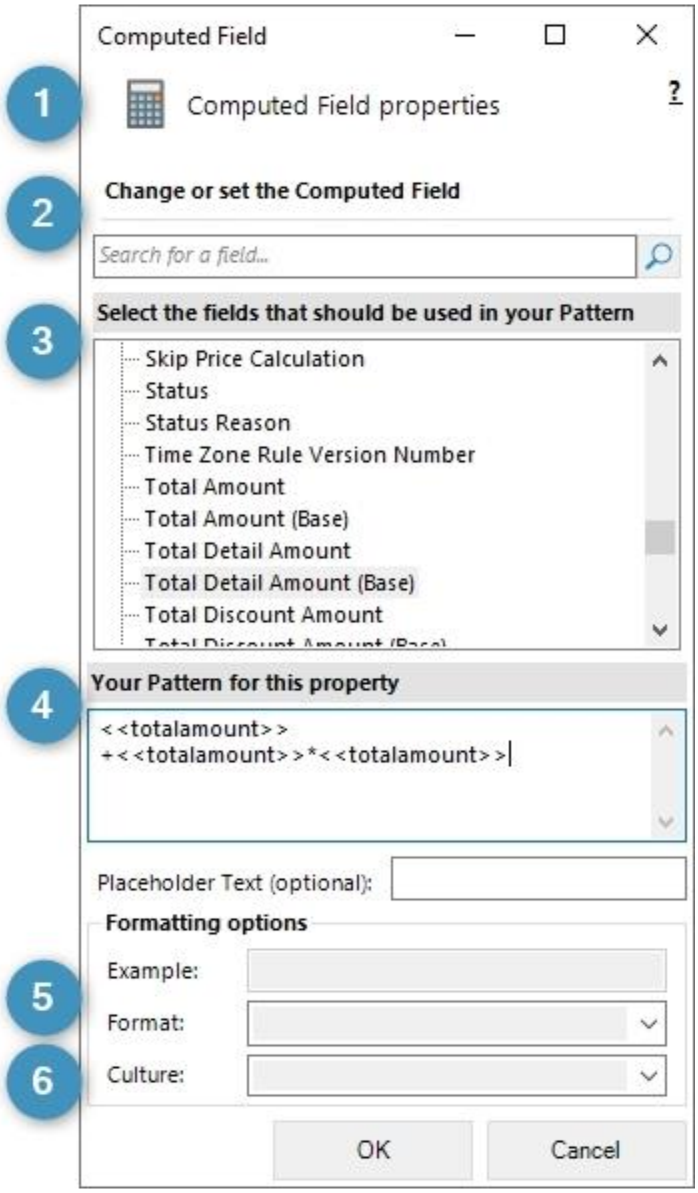


Figure 216: Computed Field properties window

6.25. The Prompt Field option – How to set up User Prompts

Prompts enable users to add or modify document elements without opening the document. The options for prompts are displayed in an additional window of the DocumentsCorePack dialog.

This blog article covers a step-by-step example on how to set up user-prompts in the DocumentsCorePack TemplateDesigner.

Please note: The new **DateTime** feature requires the DocumentsCorePack TemplateDesigner version 10.25.

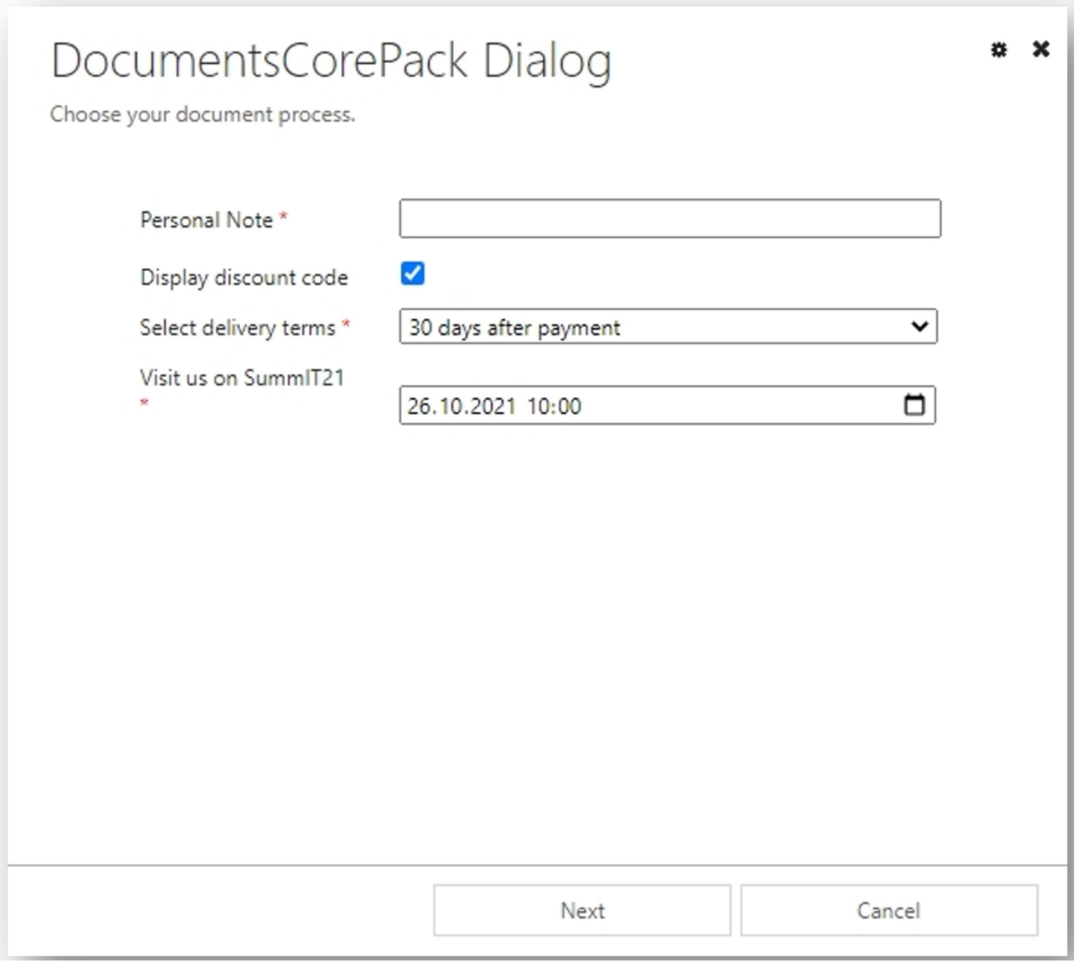


Figure 217: Prompts within the DocumentsCorePack Dialog

Step-by-step description

Step 1: Create a Prompt. A prompt is defined in a template within the advanced template settings. To access the prompt settings:

1. Navigate to the mscrm-addons.com tab.
2. Click Insert MailMerge Fields to open the DCP task pane.
3. Go to Advanced Template Settings.
4. Select Prompts.

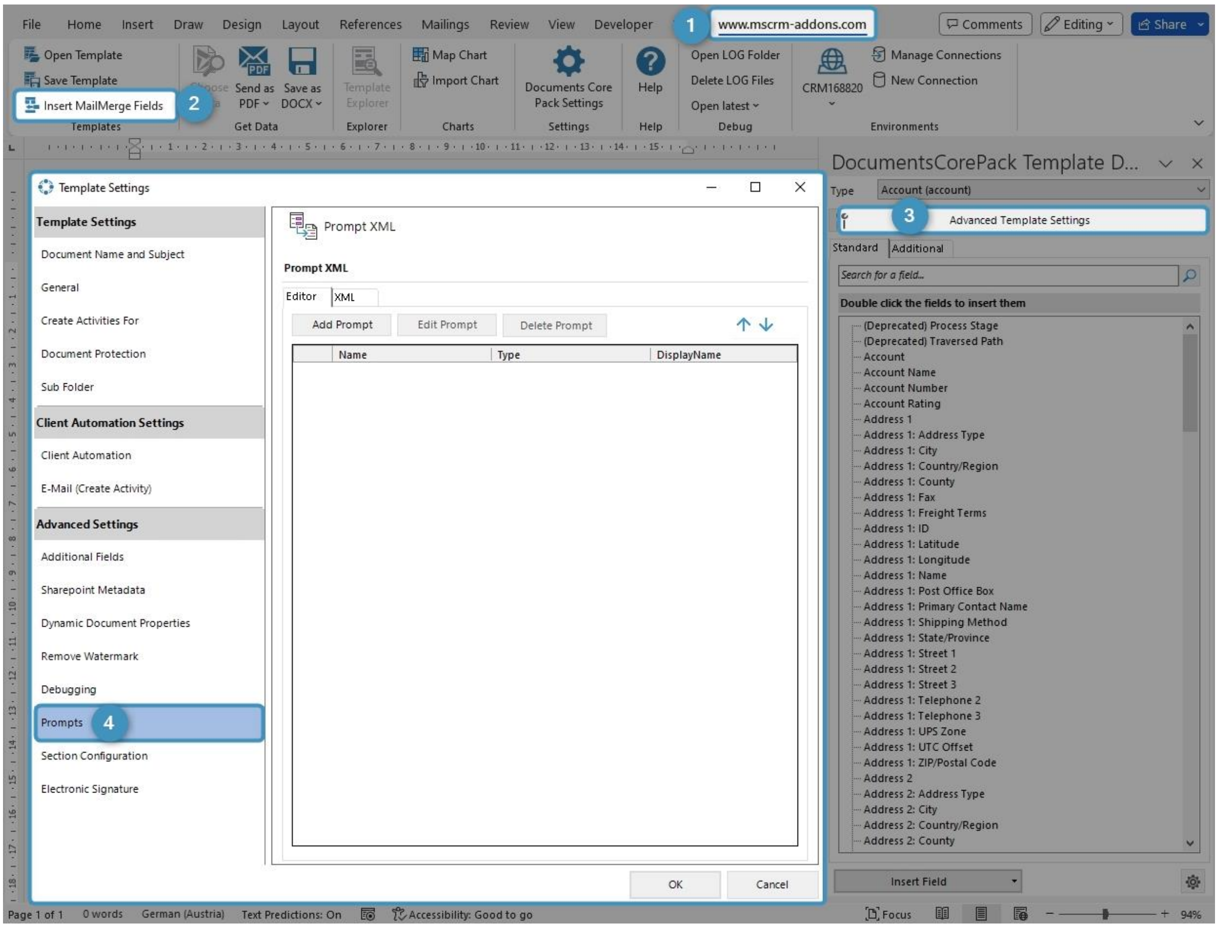


Figure 218: Prompts - Advanced Template Settings

The **Prompt Editor** allows you to:

1 Create prompts
2 Edit prompts
3 Delete prompts
4 Edit the order of how the prompts should appear

Step 2: Add a prompt. You can add a prompt by using the **Add** button.

1 Each prompt requires a name.

Please note: Certain special characters are not allowed.

2 There are 4 different types of prompts that you can select:

a) Text (as single or multiline): A text allows the user to enter additional text in the DCP dialog that will be added to the generated document. A text prompt can be a simple single line of text, or a textbox (by using the **allow line breaks** option).

b) Checkbox*:* By setting the required checkbox, you can define if a user has to enter data. A checkbox prompt enables you to either add or remove optional content in the document. A checkbox is by default mandatory.

c) Select*:* A select prompt enables you to keep only one specific section, out of several setup blocks in the document.

d) DateTime*:* There are 3 options for how to display the DateTime prompt. The default setting is DateTime, where both (date and time) are displayed. You can also choose to show just the date or just the time.

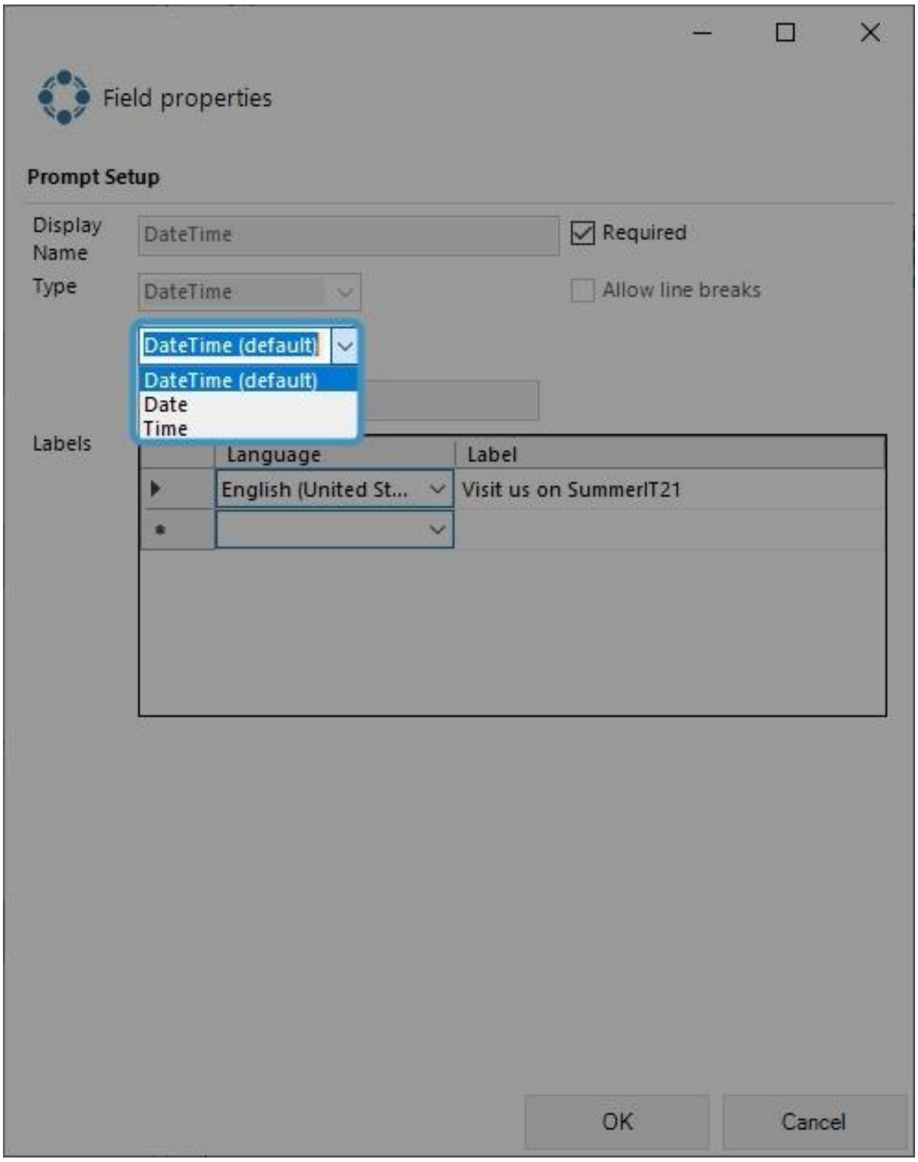


Figure 219: DateTime Prompt

❸ Each prompt requires at least one label. A label is a text displayed in the DCP Dialog before the actual control (see Figure 1). If a label for the current user **language in**

Dynamics 365 is set, this translation will be displayed. If there is no label that matches the current user's language, the first one in the list is displayed.

4 Press OK.

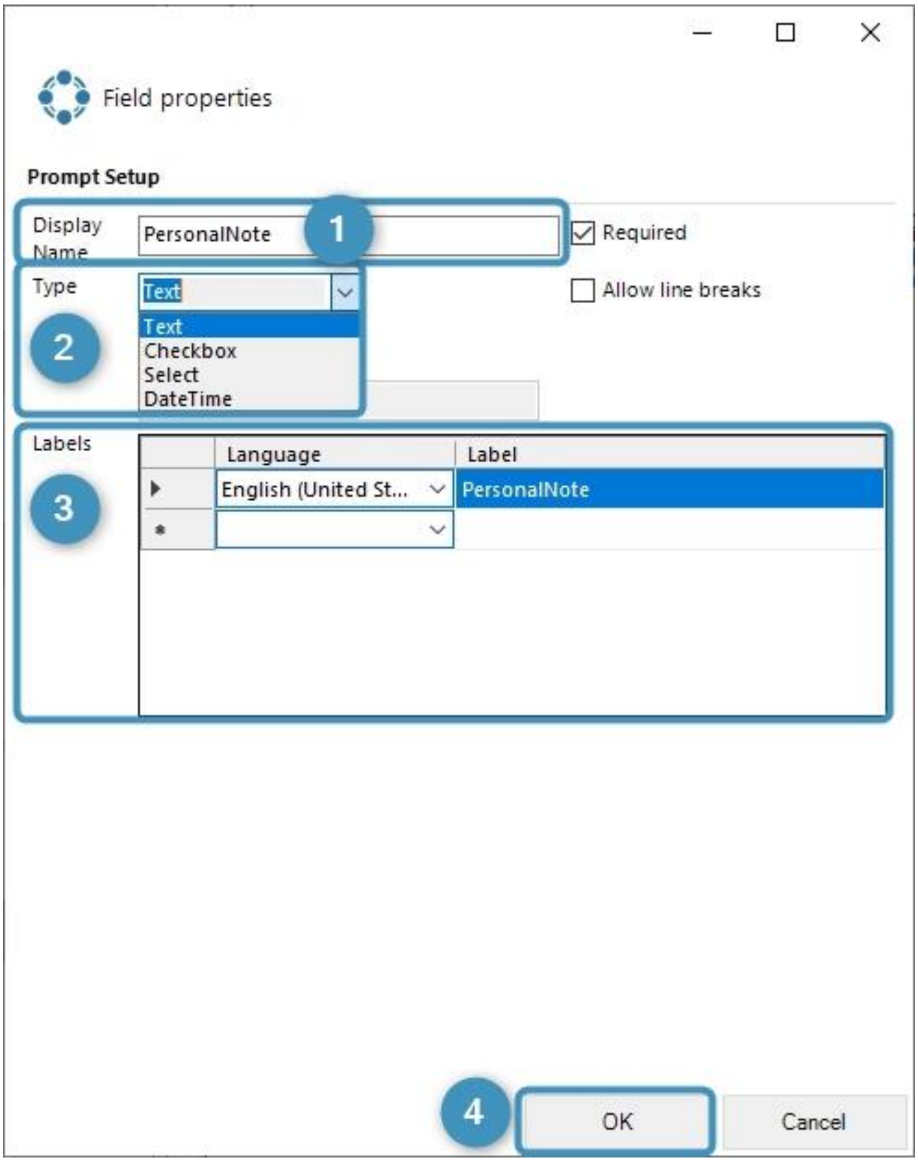


Figure 220: Label

After you have set up the prompts in the settings, you are able to insert them into your document.

Step 3: Insert a prompt in your document. You will find an additional selection in the DCP task pane.

Select **Insert Field** > **Computed Item** > 1 **Prompt Field.** Each entry represents a prompt that you have created previously.

2 It is possible to add options to the **Select** prompts, like in Figure 5. There are three options created.

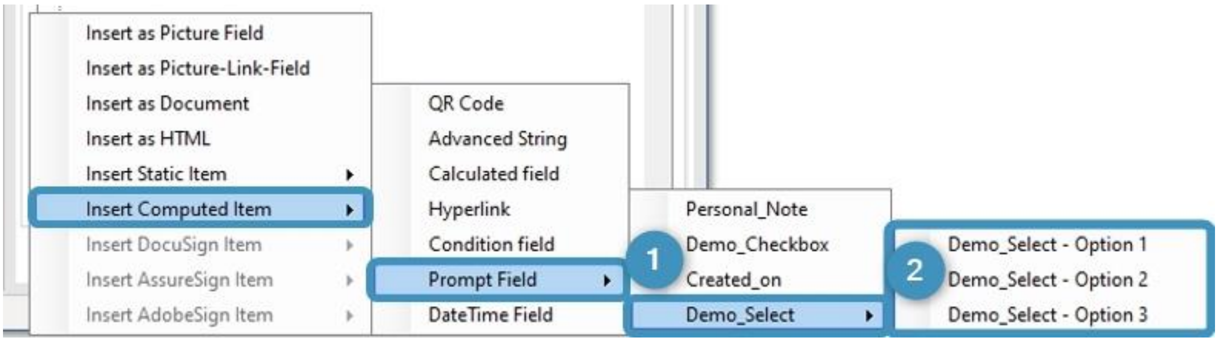


Figure 221: Insert Prompt

1 A text box does not require any further steps as it will be replaced with the text entered by the user.
2 For prompts of the type of **Checkbox** and 3 **Select**, you will have to replace the current placeholder text with your desired content.
4 For the **DateTime** prompt, select the appropriate date and time.

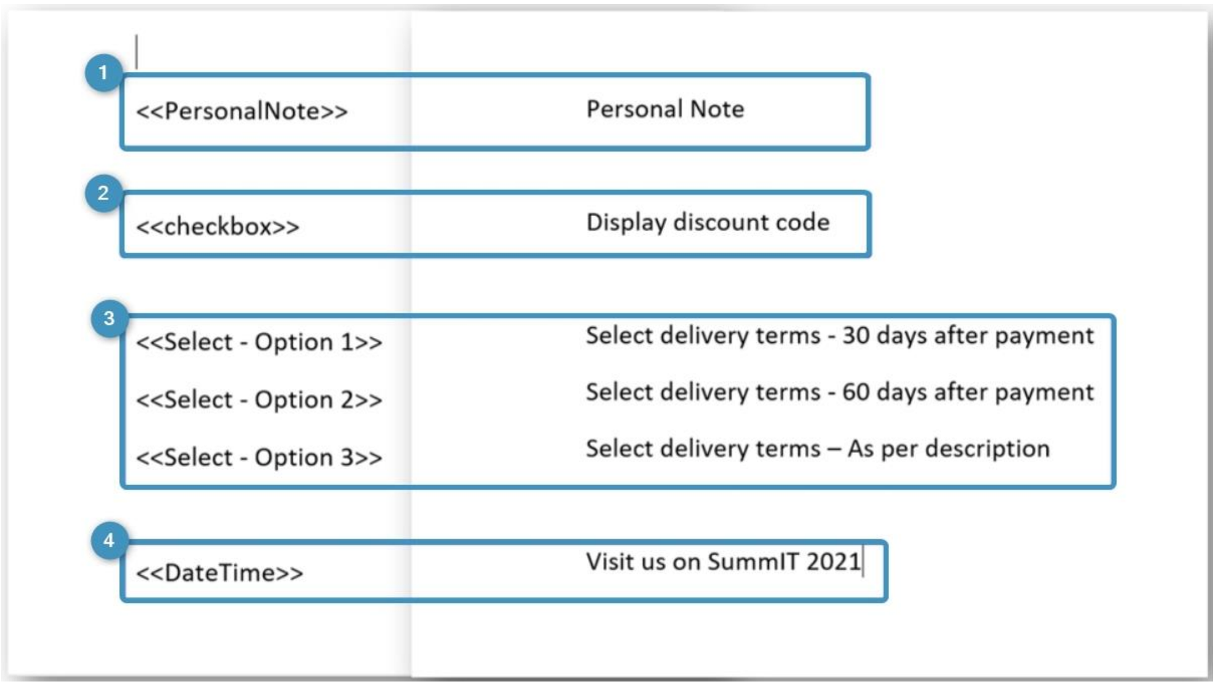


Figure 222: Template before and after replacement of placeholders

Use the **Save Template** option of the DocumentsCorePack TemplateDesigner to publish the template to Dynamics 365.

Please note: Prompts do not work with the TemplateDesigner, only by using the DocumentsCorePack Dialog (**Create Document**).

6.26. DateTime Fields

The **DateTime** option allows you to perform basic calculations with dates. You can add a certain amount of time to a current date or calculate the difference between two dates. The following step-by-step description will show you how to insert a field of this type into your template.

Step-by-step description

This description outlines how to add a DateTime field into a DocumentsCorePack template in your Dynamics 365 by using the given insert options.

This feature can only be used within DocumentsCorePack templates, so please open an existing template or create a new one before using this feature.

Step 1: Open the 1 **Insert Field** dialog and navigate to the 2 **Computed Items** section. Within this section, select the 3 **DateTime Field** button.

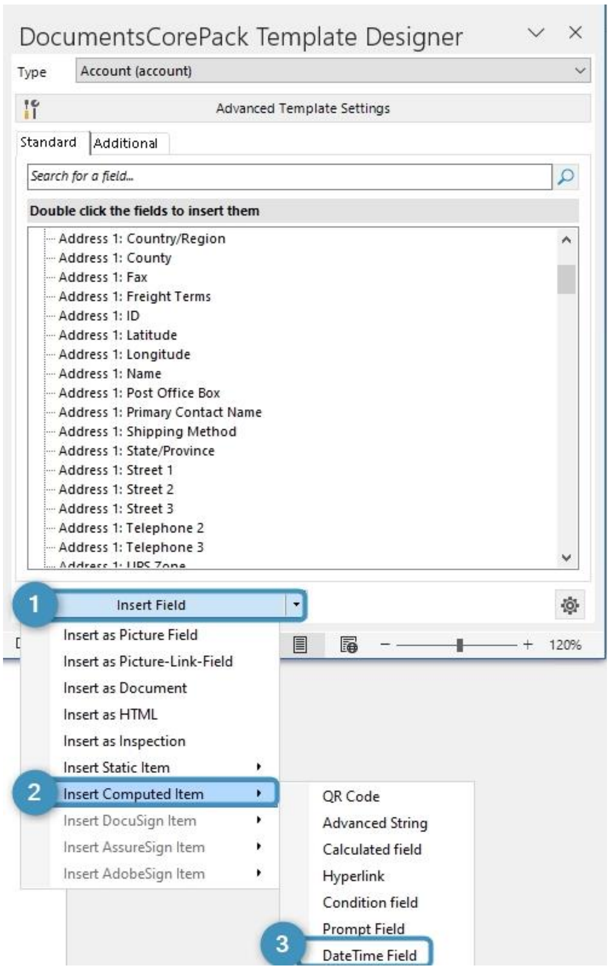


Figure 223: Insert Field dialog

Step 2: The "**DateTime Field**" dialog will open. This dialog allows you to specify your **DateTime Field** based on the given options.

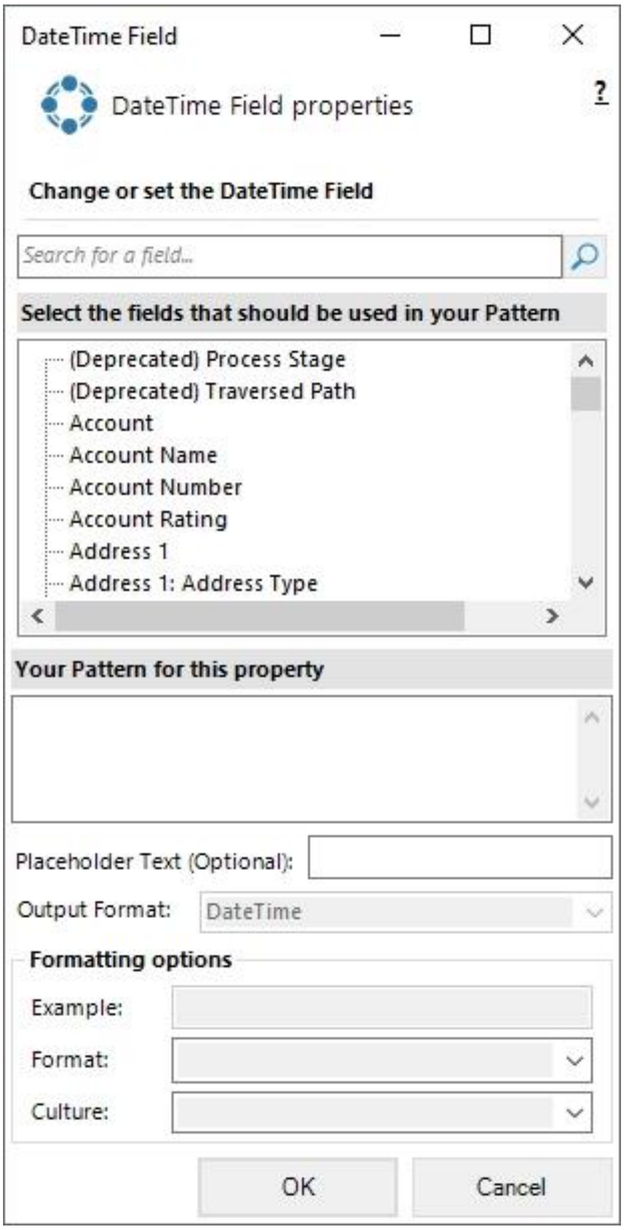


Figure 224: DateTime Field dialog

Step 3: Add your **DateTime** calculation to the pattern field. In our case, we will add 5 days to the due date of a quote.

Please note: The layout of the dialog will change depending on your used syntax.

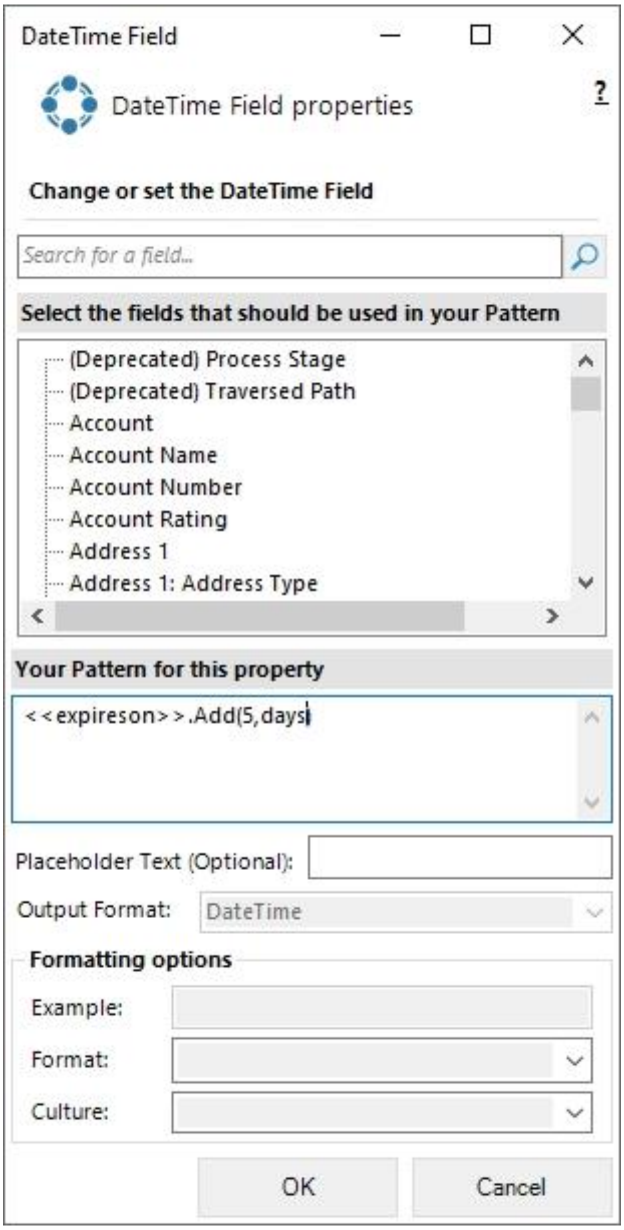


Figure 225: DateTime Field Syntax

Step 4: Add a placeholder text [optional]**.** You can set a 1 placeholder name for your field, so you find it easier in case you have to modify your template in the future.

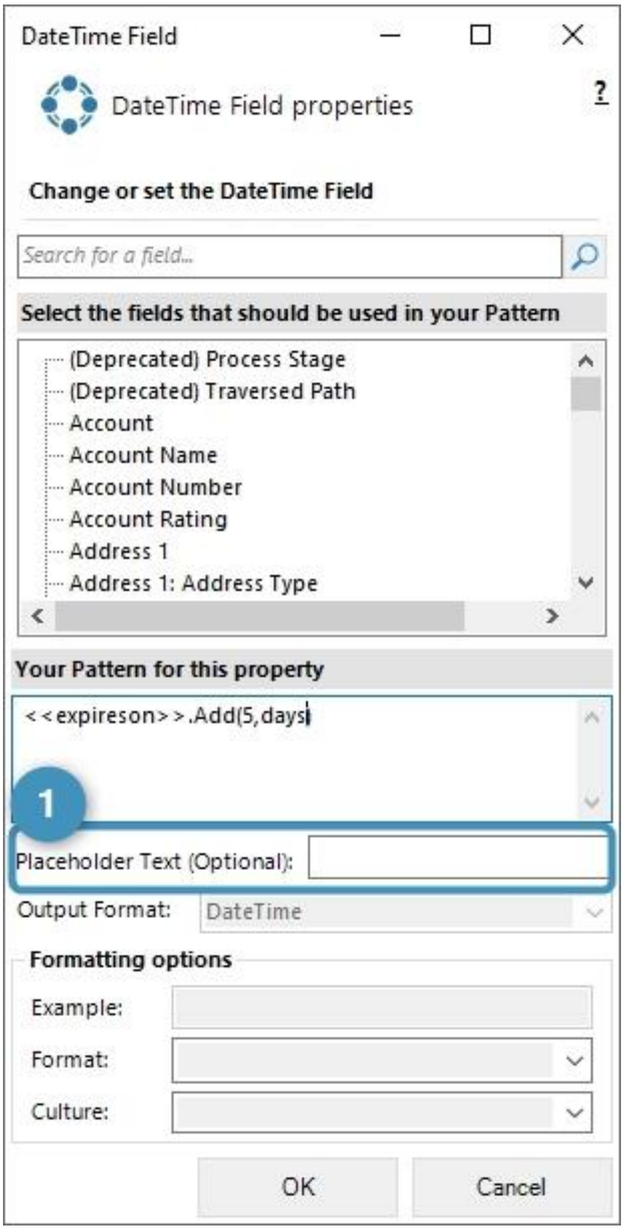


Figure 226: Add placeholder text

Step 5: Add formatting options. Since we now have our syntax configured, we would like to define a format. This can be done by selecting one of the given options in the **Unit Type**, **Format,** or **Culture** dropdowns.

The dialog provides us with different options for 1 **DateTime** and 2 **Difference** (subtraction of two dates) results. Based on this type we will have one of the two following dialogs.

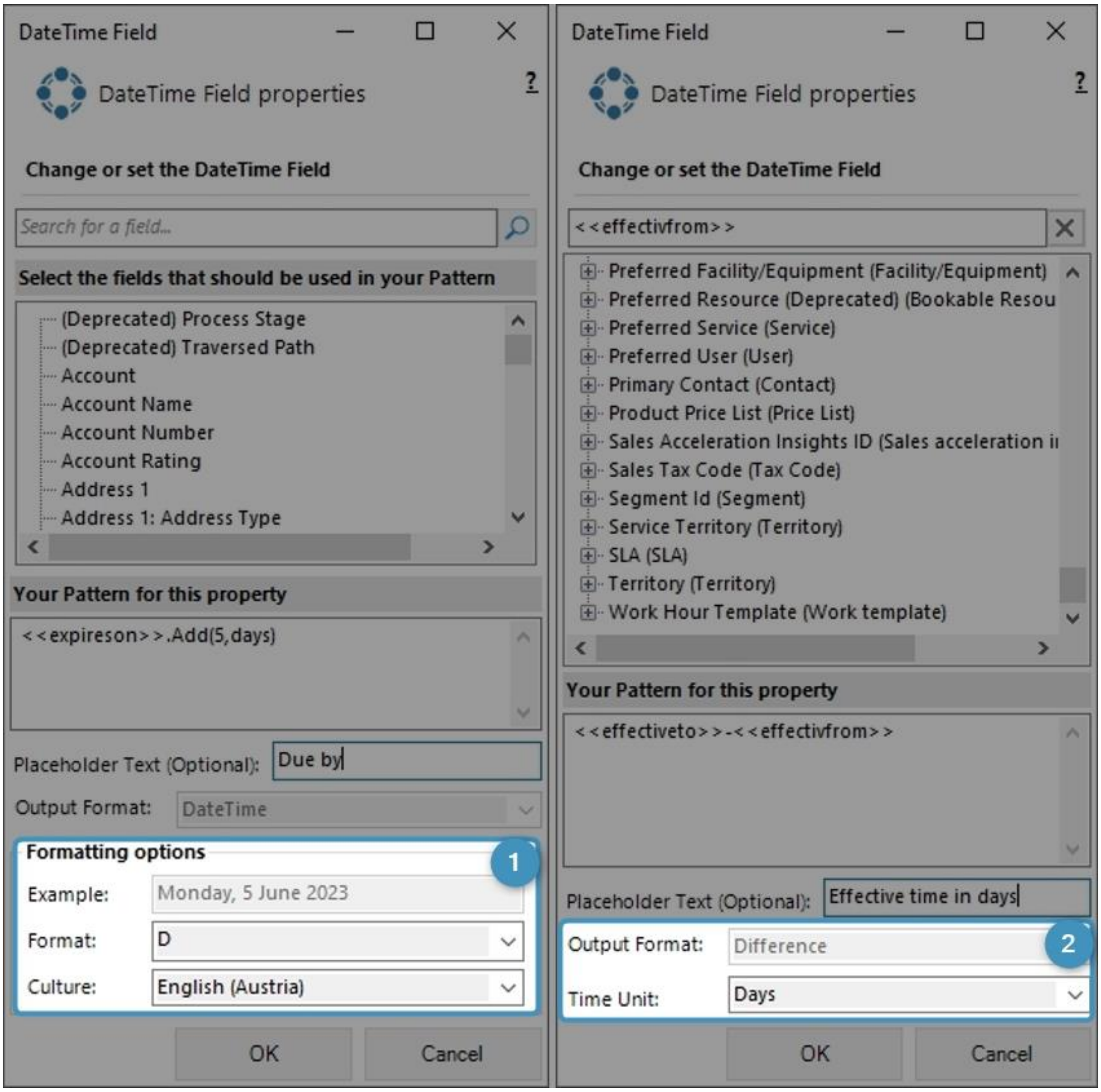


Figure 227: Different options based on the selected syntax

Step 6: Insert the field. Now the **DateTime Field** is successfully defined. Click on the **OK** button to insert it into the document.

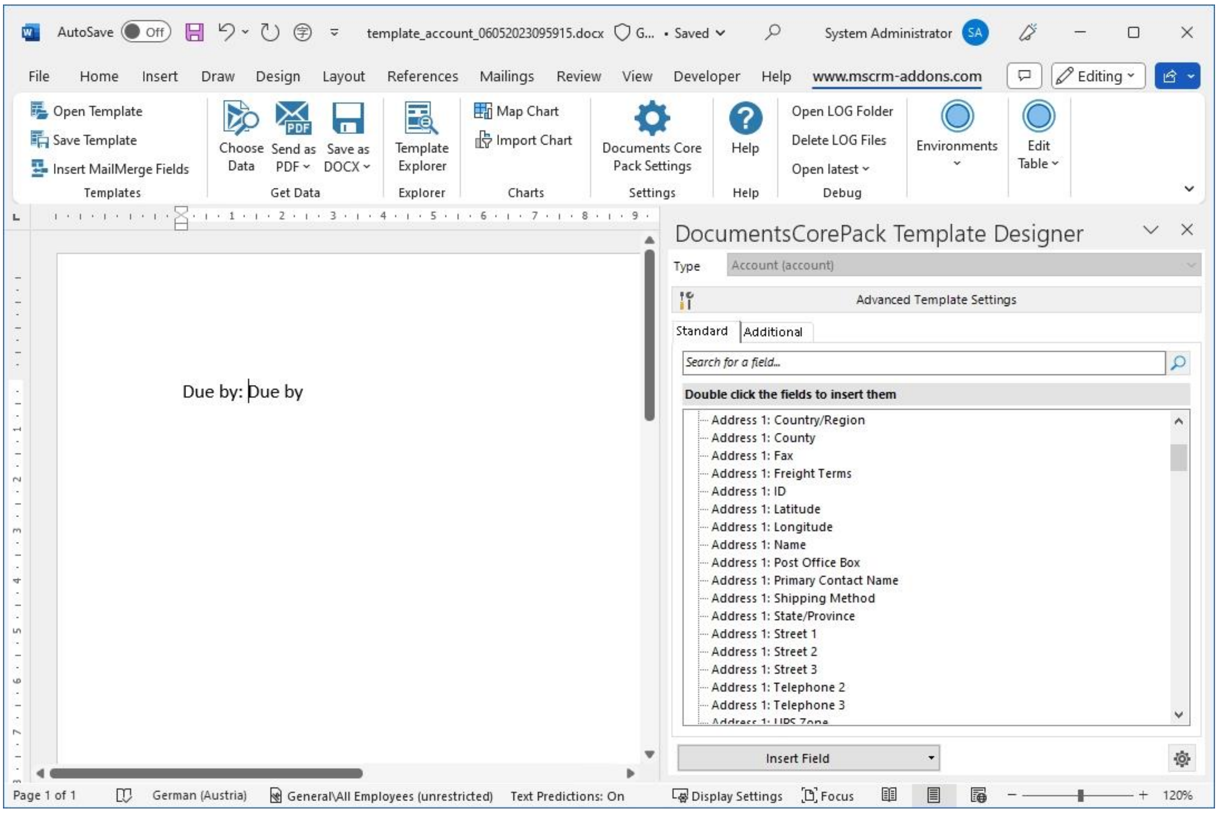


Figure 228: Finished template

Step 7: Save the template. The last and final step is to save your template. Before you can use or test your template, you have to save it. You can either save your template locally with the standard **Save** or **Save as** functionality of Word, or you use the **Save template** option of DocumentsCorePack in order to publish the template to Dynamics 365.

Step 8: Test your template [optional]. As you make changes to your template, you may want to test them quickly.

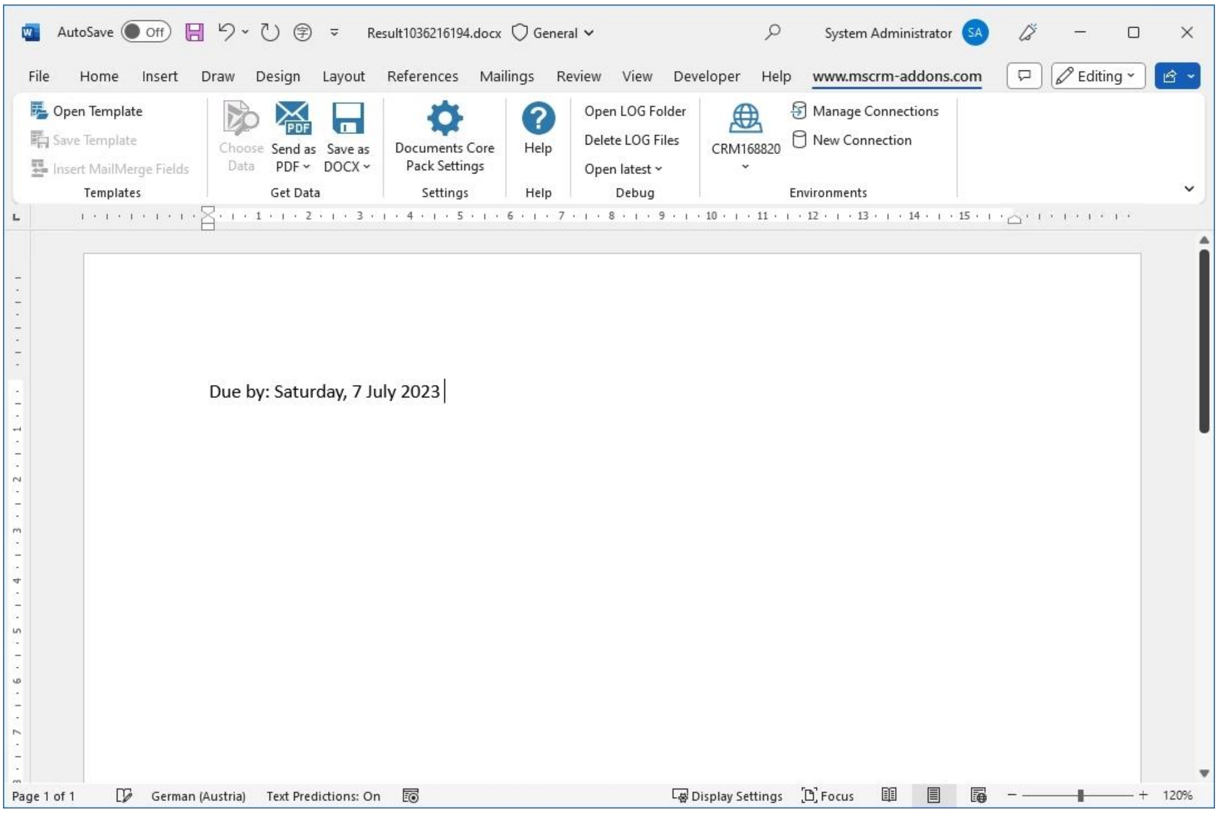


Figure 229: Result after merging

6.26.1 DocumentsCorePack DateTime Field Syntax

Fields from Dynamics are enclosed by “<<” and “>>” when you insert them from the tree view.

Please note: You cannot join different parameters. If you would like to add days and months, please always use the lowest unit for your chosen parameter. For example, 1 Month and 15 Days would be 45 Days.

Supported functions and operators

- **Operator table**

Operator Name	Sign	Example
Difference	-	<<duedate>> – DATETIME()

		For example, calculate an offer with a due date minus today´s date.

- **Function table**

Function	**Description**	**Example**
Add(value, unit)	Adds a numeric value to the current date. The first parameter represents the numeric value that should be added. The second parameter represents the unit. Parameters for units are either: year, month, weeks, days, hours, minutes, seconds, milliseconds	<<createdon>>.Add(10,year)
Subtract(value, unit)	Subtracts a numeric value from the current date. The first parameter represents the	<<createdon>>.Subtract(10,year)

	numeric value that should be subtracted. The second parameter represents the unit. Parameters for units are either: year, month, weeks, days, hours, minutes, seconds, milliseconds	
Addbusinessdays(value)	Adds a certain amount of days to the current date. Weekends (Saturday and Sunday) are excluded from this calculation.	<<createdon> >.Addbusinessdays(10)
Round(unit, direction)	Round allows you to modify a time value to the next or previous quarter, half or full hour. The first parameter can display a quarter, half, or full hour. The second parameter represents the direction. (up/down)	<<createdon>>.Round(quarter,up) <<createdon>>.Round(half,down) <<createdon>>.Round(full)

DATETIME()	This function returns the current date and can be used as a field paired with any of the above functions.	DATETIME().Add(5,days)

7. DocumentsCorePack Template Designer Settings

To access the settings, click on **mscrm-addons.com** and navigate in the ribbon to the DocumentsCorePack Settings.

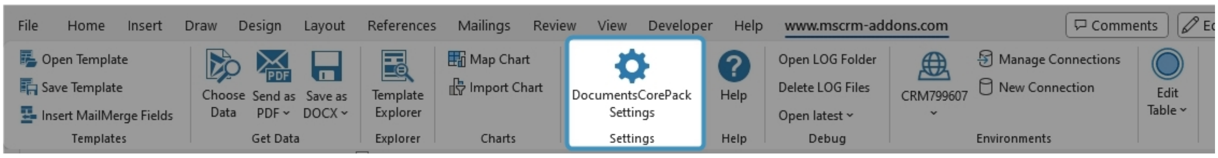


Figure 230: Template Designer Settings

****Please note**: Settings marked with a ** in *Italic* are deprecated and only relevant when using the DocumentsCorePack Word-Add-In (Client) to generate and process documents directly in Microsoft Word. In default scenarios where this Word-Addin is only used to design templates, they are not required.

7.1. General

1 Global Settings

- **Default Entity**: Defines the entity that is pre-selected when opening the "**Insert MailMerge Fields**" Taskbar.
- ****Default direction for documents added to Dynamics 365 is 'OUTGOING'**: When a new document is added to Dynamics 365, it is an outgoing document by default. It is sent out rather than received from an external source.
- ****Default closed letter status reason**: Refers to the status reason automatically set when an Activity Letter is closed or completed and can be customized to fit the organization's needs.
- ****Provide SharePoint user:** Specifies the user account that will be used to connect to SharePoint when integrating SharePoint with Dynamics 365/CRM.

- **Use ADAL for SharePoint: The Azure Active Directory Authentication Library is a Microsoft library that allows developers to authenticate users easily and access Azure AD-protected resources such as Office 365, Dynamics 365, and SharePoint Online.

❷ Ribbon settings

The following settings allow limiting the option shown in the **mscrm-addons.com** ribbon. Thus, you can remove options that are not necessary for your users.

- **'**Create Activity**' – Button visible
- Show '**Change Organization**' – Button
- **'**Send as PDF**' – Button visible
- **'**Save Document**' – Button visible
- '**Template Explorer**' – Button visible
- '**Override Global Settings**': With this setting, it is possible to modify/customize the default ribbon configuration of an entire system to have settings personalized to one's needs.

❸ Contextmenu

- **Deactivate the Contextmenu-Integration:** Deactivate any custom menu items that have been added to the context menu.

❹ Demo Templates

- **Import**: DocumentsCorePack comes with a set of predefined templates that can be used to view best practices and examples of different templates. With this option, you can import those templates into your environment.

❺ Debugging

- **Activate Debugging**: Debugging helps our support team to identify and correct errors and investigate issues you might experience when using DocumentsCorePack. [This article] describes how to activate debugging.

❻ Dynamics 365 Settings

- **Default App**: Find here pre-configured sets of dashboards, forms, views, and charts designed to meet your specific business needs.
- **Default Browser**: Set your preferred Browser.

❼ Dataprovider Settings

- **Do not use Dataprovider**: Define if you want to use the DataProvider as an external program, or if Word should connect to Dynamics 365 directly. [Learn more].

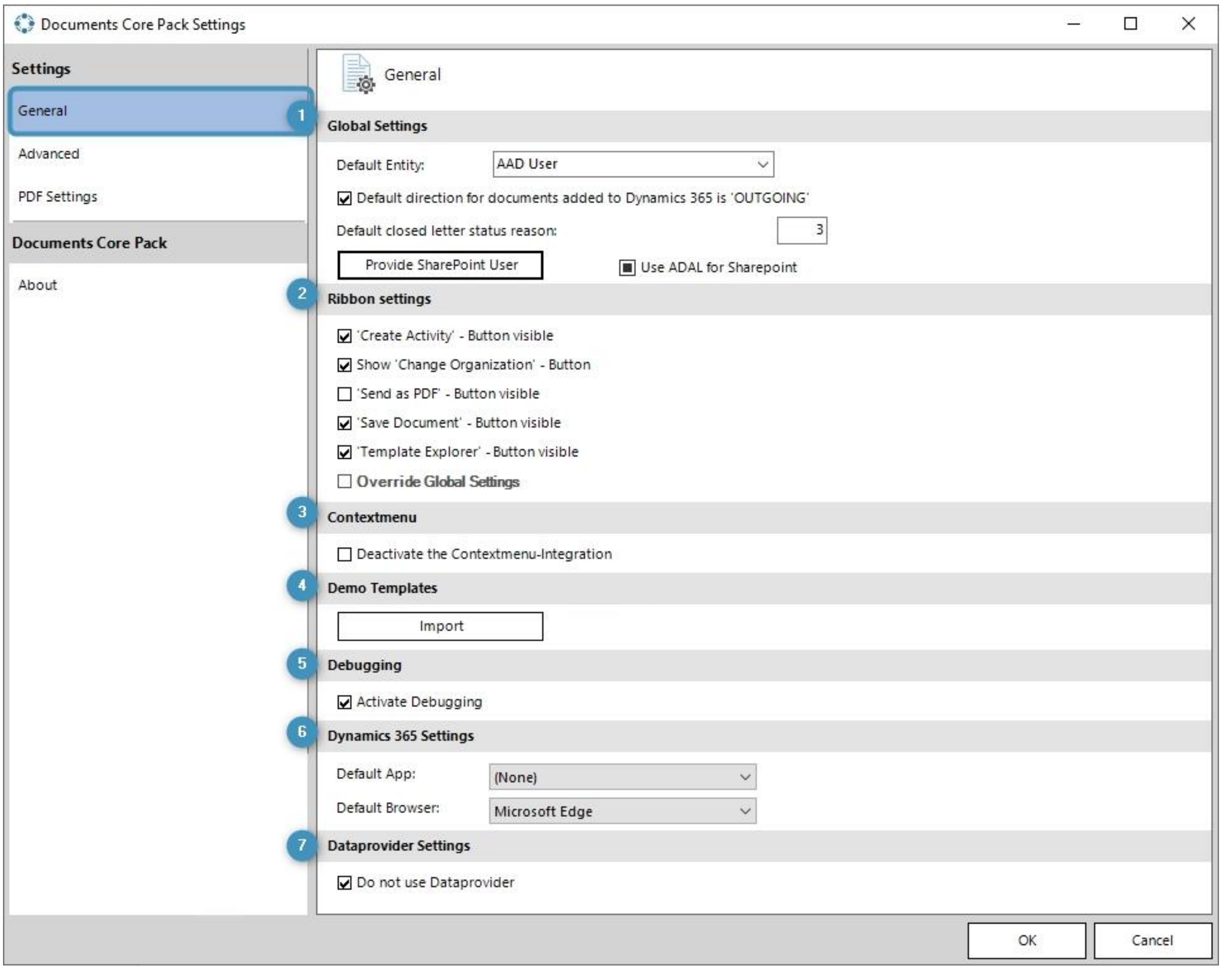


Figure 231: DocumentsCorePack Settings – Global Settings tab

7.2. Advanced Settings

1 Messages

- **Don´t show aggregation switch warning**: No warning message is received when toggling the aggregation switch on or off in a report or dashboard.
- **Don´t show template type selection message**: By disabling this setting, the template type selection prompt is skipped, and the default template type is used instead.
- **Don´t show insert bool as checkbox message:** When enabling this setting, Boolean fields will automatically be inserted as checkboxes in the report or document.
- **Don´t show save dialog to view document properties:** When this setting is enabled, document properties will not be displayed after saving the document or report.

2 Metadata

- Update metadata automatically
- Use split requests (for slower connections)
- Notify when Metadata changed

3 Word template settings (*.docx)

- ***Bulk merge – Use destination styles*
- Insert CC – Add a Blank after inserting a field

4 Word 97-2003-Template settings (*.dot)

- Automatically merge to a new Document
    - Data source
    - HTML

5 Query (FetchXML) Generation

- **Use Deep Fetch Analyzer for new Templates**: Is required for templates with many relationships and basically executes the fetch in an alternative way. Learn more.
- **Do not update Query when saving the document**

6 Behavior

- *****Open Template in new Word Instance***
- *****Merge Documents with DataProvider when using Export To Word***

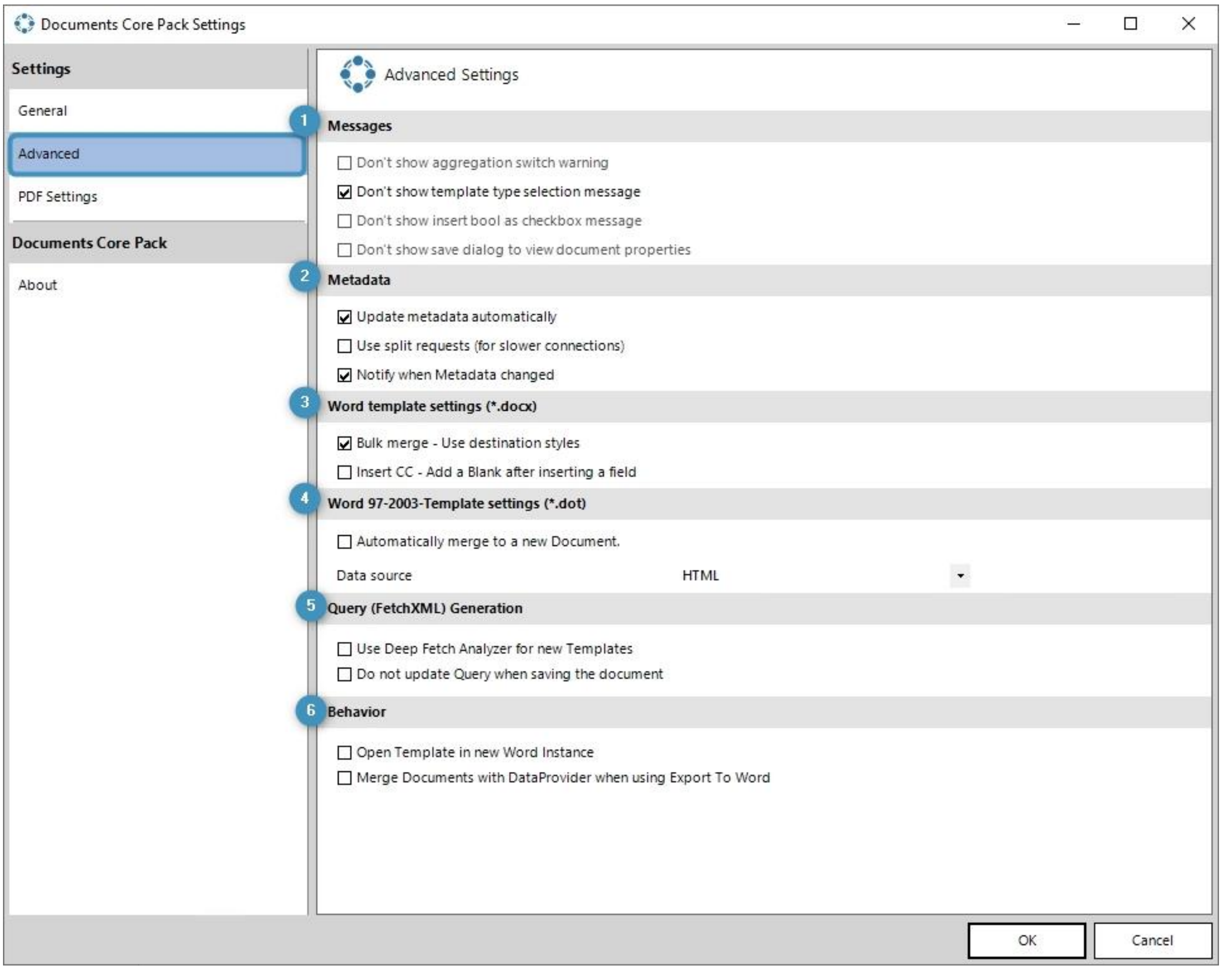


Figure 232: Advanced tab

7.3. PDF Settings (Deprecated)

❶ PDF Settings

- ****Attach document as PDF to the activity***
- ****Delete PDF after attaching***
- ****Use 'Send as PDF' with Outlook***
- ****PDF Printer***

❷ Outlook Client Settings

- *** Enable Outlook Account Settings*
- *** Outlook Account*
- *** Save e-Mail message before sending*

❸ Outlook Info

- ***Outlook installed*
- ***Dynamics 365 Outlook Client loaded*
- ***Dynamics 365 Outlook Client is Offline capable*
- ***Dynamics 365 Offline Client*
- ***Dynamics 365 Light Client*

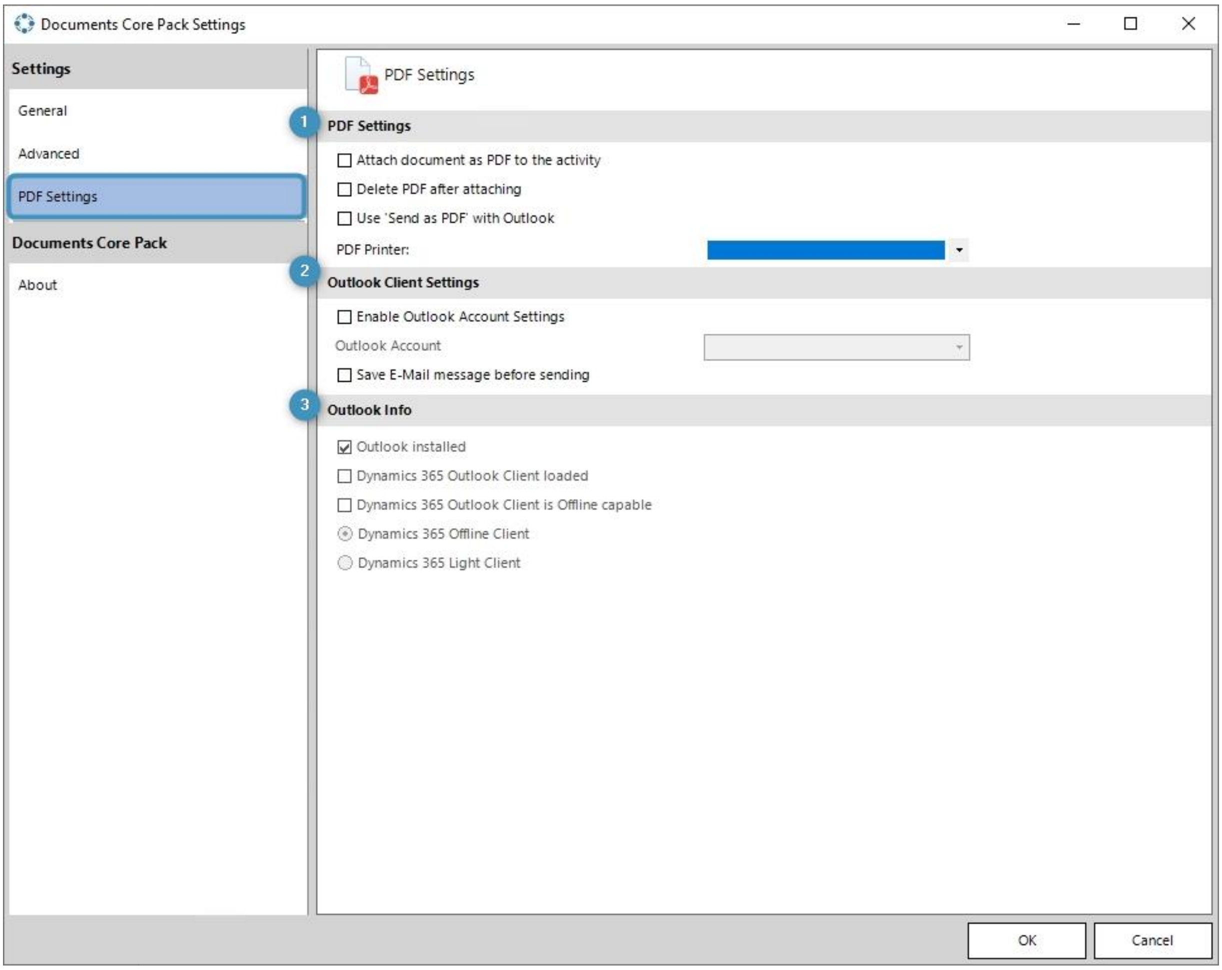


Figure 233: PDF Settings tab

7.4. About

- **Product information**: Find information about the product, the product version, and the License information.

8. General Word functionality that is referenced in this guide

Within this chapter, you can find some short How-To's related to Word functionalities that can be useful when working with templates.

8.1. How to insert a Watermark

Watermarks can be viewed only in **Print Layout** and **Full Screen Reading** views and on the **printed page**. You can insert a pre-designed watermark from a gallery of watermark text, or you can insert a watermark with custom text.

To insert a watermark, begin by navigating to the **Design** tab and then to the **Page Background** group. Here, click **Watermark**.

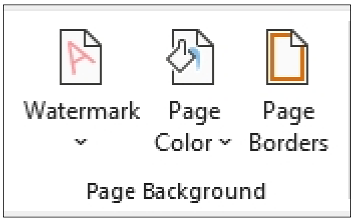


Figure 234: Design tab - Page Background – Watermark

Complete one of the following methods:

- Select a predesigned watermark, such as Confidential or Urgent, in the gallery of watermarks.
- Click Custom Watermark and then Text watermark and then select or type the text that you want. You can also format the text. To preview a watermark as it will appear on the printed page, use the **Print Layout** view.

For more information have a look at this article.

8.2. How to work with Field functions

First, click where you want to insert the field. On the **Insert** tab, navigate to the **Text** group and click **Quick Parts**, and then click **Field**.

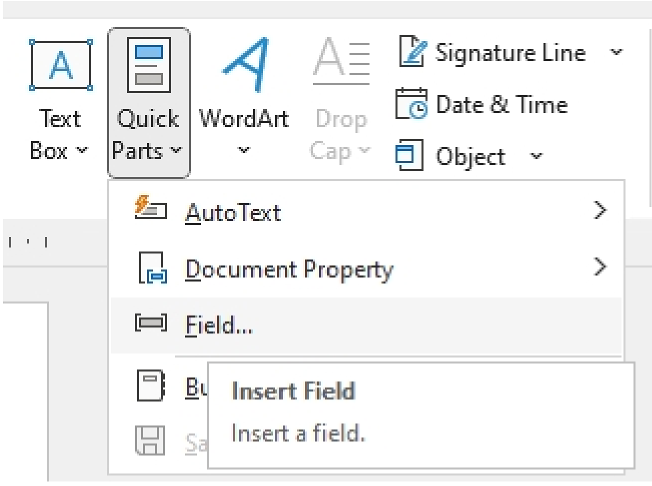


Figure 235: Insert Field

In the Categories list, select a category. In the Field names list, select a field name.

Select any properties or options that you want.

- If you want to see the codes for a particular field in the Field dialog box, click Field Codes.
- To nest a field within another field, first insert the outer or container field by using the Field dialog box. Then, in your document, place your cursor inside the field code where you want to insert the inner field. Then use the Field dialog box to insert the inner field.

If you know the field code for the field that you want to insert, you can also type it directly in your document. First press CTRL+F9, and then type the code within the brackets.

For more information have a look at [this article].

8.3. Dynamics 365 SharePoint integration

SharePoint Integration is a collaboration and content management application that simplifies how people store, find, and share information. It helps people to collaborate effectively by having secure access to documents and information that they require to make business decisions.

The SharePoint integration feature enables you to store and manage documents on SharePoint in the context of a Microsoft Dynamics 365 record and use the SharePoint document management abilities in Microsoft Dynamics 365, such as checking the document in and out, viewing version history, and changing document properties.

For more information hava a look at this article.

8.4. What is Dynamics 365 Metadata

Microsoft Dynamics 365 use a metadata driven architecture to provide the flexibility to create custom entities and additional system entity attributes. This structure also makes upgrades and the transportation of customizations easier. The data structure can change without requiring any change to code in the Microsoft Dynamics 365 applications.

For more information have a look at this article.

8.5. Location of Files

There are three major save locations for files that are used by the DocumentsCorePack Template Designer.

Please note: The CRM numbers in the path are displayed as "20XX", because the path depends on the CRM version you are currently using. Please insert your version number instead of the "XX". (For example: For CRM 2015, insert 15 instead of XX).

If you upgrade from an older version, the DocumentsCorePack version number can change too.

8.5.1 The Installation Directory

The installation files of DocumentsCorePack can be found here:

C:\Program Files\PTM EDV-Systeme GmbH\Documents Core Pack Client for MS CRM 20XX.

Or alternatively here (depending on your Windows and Office version):

C:\Program Files(x86)\PTM EDV-Systeme GmbH\Documents Core Pack Client for MS CRM 20XX

If you have changed the installation path during the installation process, you will find the files in the latter option. This directory contains the needed assemblies and resources.

Please note: Do NOT ever delete change or modify any files in this location.

8.5.2 The Application Directory

The application data location can be found here:

%APPDATA%\DCP

The above location is equal to:

C:\Users\[YourUsername]\AppData\Roaming\DCP.

This location may contain volatile subfolders and documents. The most important subfolder here is called **metadata**. This folder contains the metadata information of your CRM organization(s).

8.5.3 The Temporary Directory

The application data location can be found here:

%TEMP%\DCP

The above location is equal to

C:\Users\[YourUsername]\AppData\Local\Temp\DCP

This location contains temporary files, like, for example, downloaded templates. The most important subfolder in this location is the subfolder **log**, which contains debug files if debugging is enabled.

9. DocumentsCorePack Diagnostics

DCP Diagnostics is an extended application that troubleshoots issues with the DocumentsCorePack Template Designer. It can be found in the installation folder of DocumentsCorePack.

The name of the application in this folder is **DCPDiagnostics.exe**.

Please note: If you are not a local administrator, some functionalities of the tool may not work properly. Executing the program as administrator avoids any issues.

If you are not an administrator, you will receive the error message below when you click on **DCPDiagnostics.exe**. Click on the **Yes** button to proceed. You will then be forwarded to the DCP Diagnostics surface.

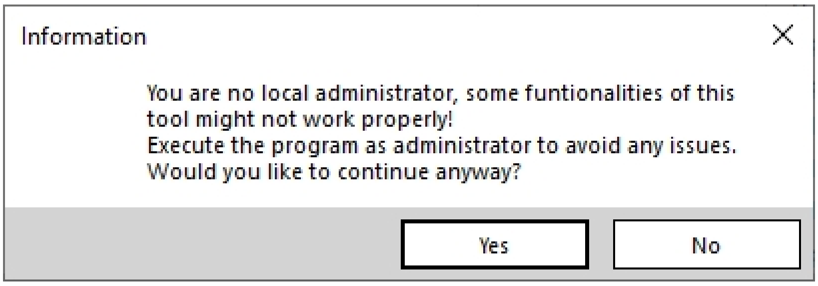


Figure 236: Warning message

The DCP Diagnostics surface consists of 3 tabs:

1. Diagnose tab,
2. System Information tab
3. Tools tab.

The functionality of the different tabs is displayed in the next chapters.

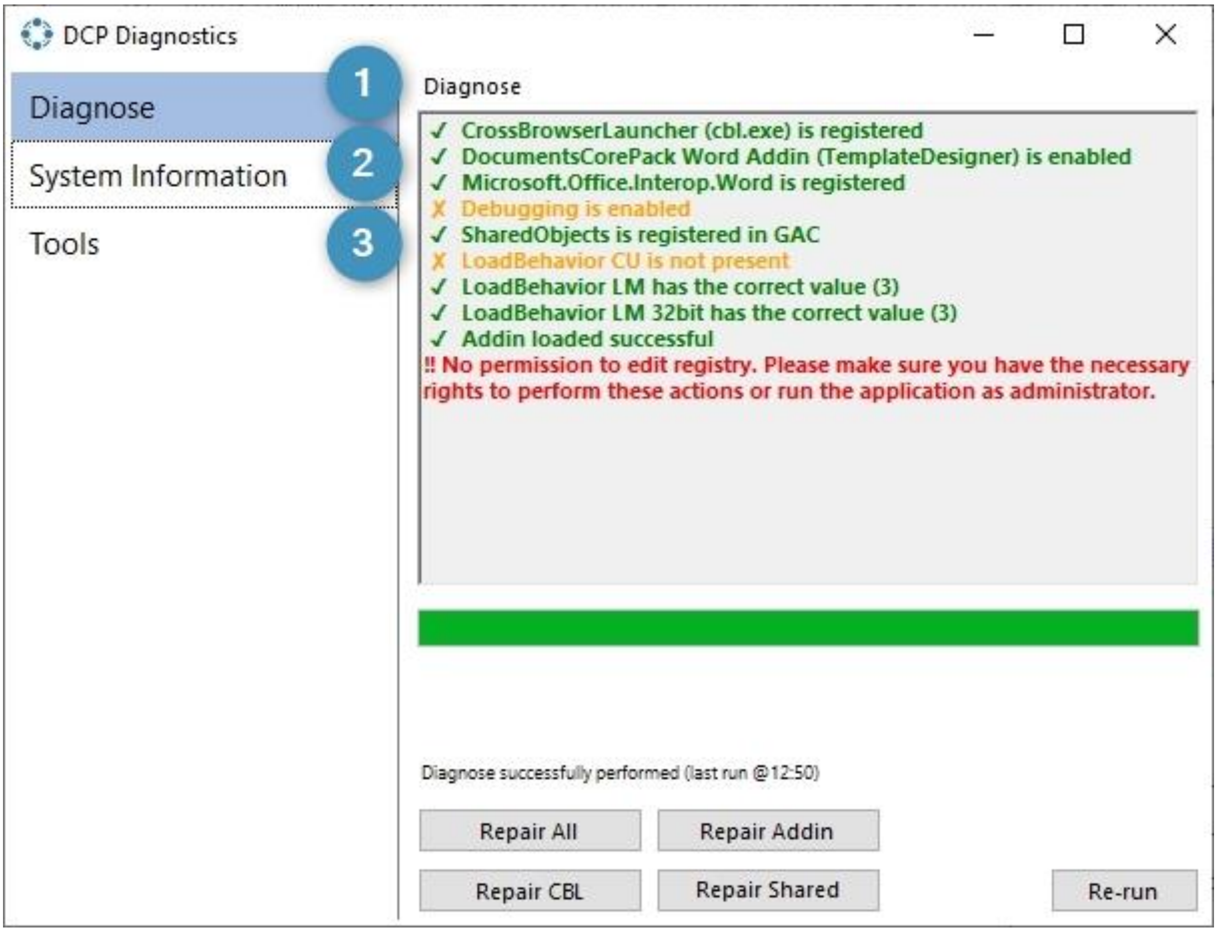


Figure 237: DCP Diagnostics tool surface

9.1. The Diagnose tab

This tab provides you with a general overview.

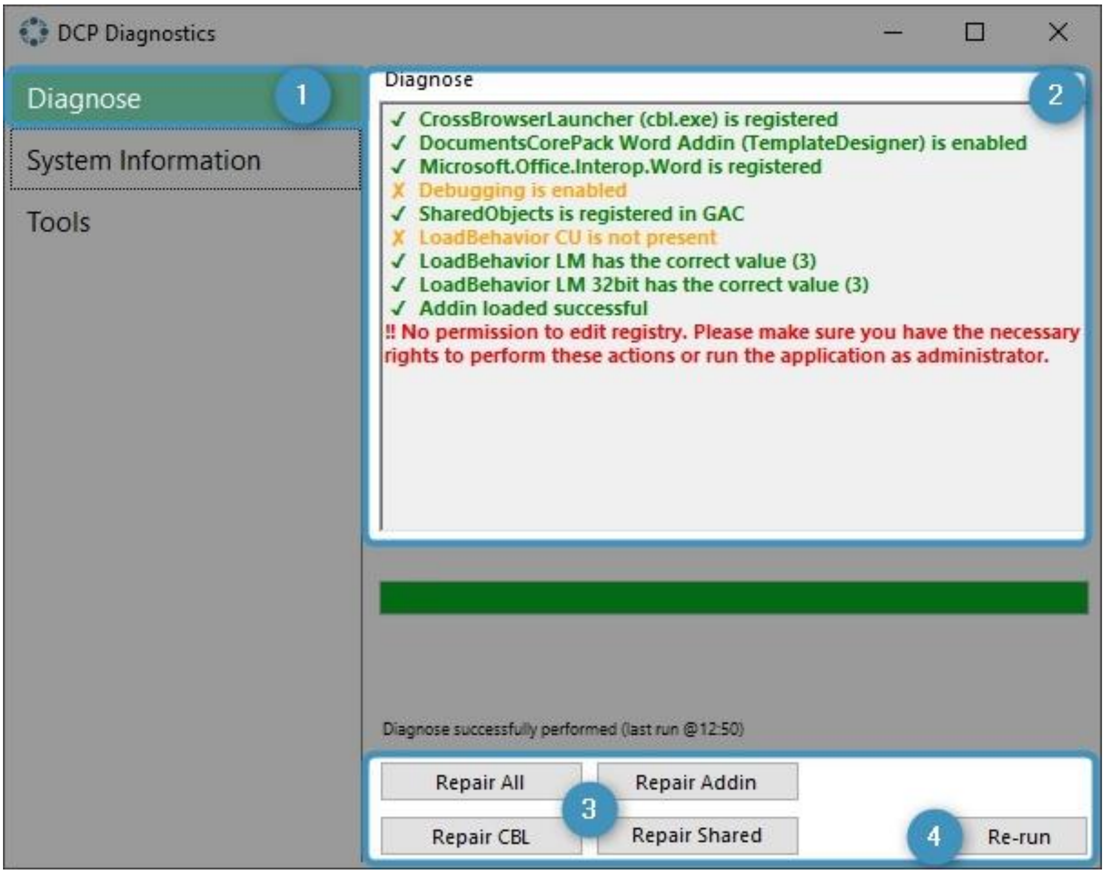


Figure 238: Diagnose tab

① **Diagnose tab**: This tab offers a short overview of the most important system settings required by DocumentsCorePack.

② In the Diagnose section the information is displayed in different colors:

- Green: Good, no worries
- Orange: It is OK, not serious
- Red: Action may be needed (there might be some trouble, but it is not clear yet)

③ **The Repair buttons**: Serves as a kind of **fast repair**, if a red/orange alert occurs.

④ **The Re-run button**: Starts the repair process once again.

9.2. The System Information tab

A list of information regarding your device is displayed. This shows you details such as your OS, your version of DCP, and the version of various Internet browsers.

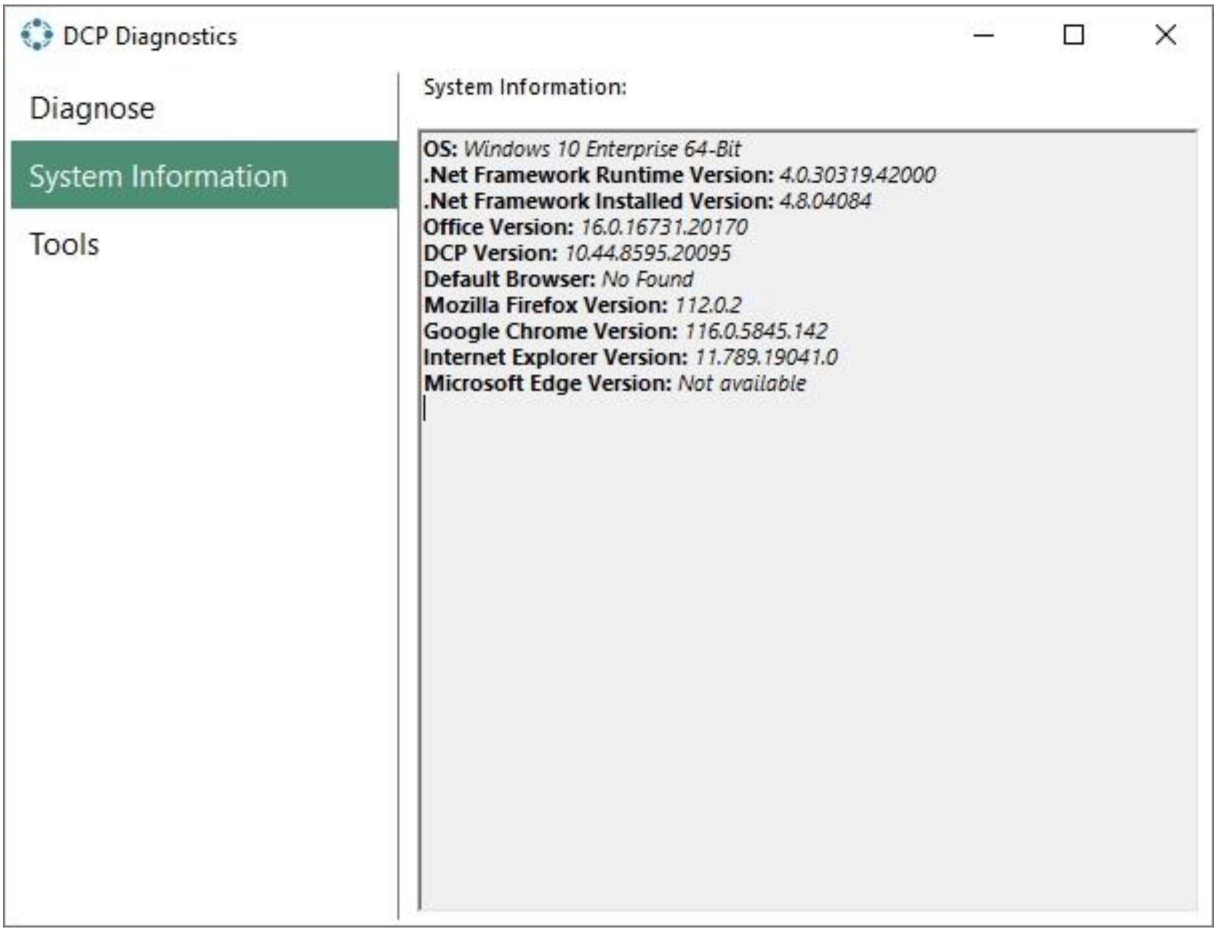


Figure 239: System information tab

9.3. The Tools tab

The Tools tab contains several functions useful for managing certain aspects of the DocumentsCorePack. It contains four different groups:

1 Metadata
2 Debugging
3 GAC Install
4 and Misc.

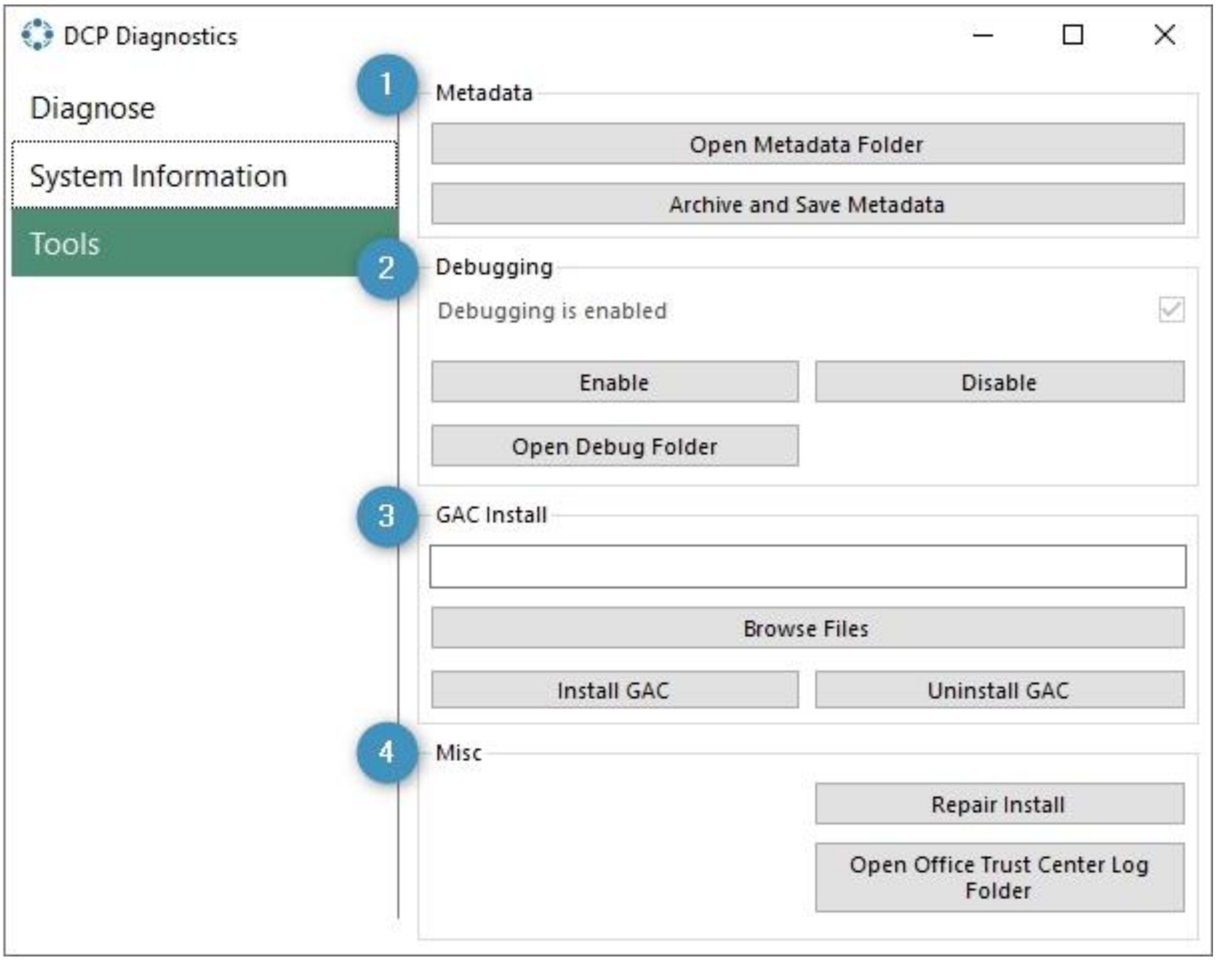


Figure 240: The Tools tab displaying the various groups

1. Metadata

Metadata contains two options:

- Open Metadata Folder – Clicking the **Open Metadata Folder** will bring you to the folder that contains the metadata the DocumentsCorePack needs to operate properly.

- Archive and Save Metadata – **Archive and Save Metadata** will prompt you to select a folder. Clicking on **OK** will save the current metadata in the folder that you selected.

2. Debugging

In this group, you can enable or disable debugging. Clicking the **Open Debug Folder** button will bring you to the folder that contains debugging log files.

Please Note: This option should only be used if you cannot access the MSCRM ribbon in Word. Otherwise, you should activate debugging through the Documents Core Pack Settings button.

3. GAC Install

You can choose and install a dll (dynamic link library) into the Global Assembly Cache (or GAC) here. The Uninstall button will remove the dll of your selection from the GAC. Regardless of the option you choose the path to the dll file will be displayed within the textbox.

4. Misc.

The **Repair Install** button will attempt to repair the DCP installer. This is different from the 'Repair All' button in the diagnose tab, as this will only attempt to repair the installer itself.

10. References

Have here a look with all you can do with documentation, hands-on training, and certifications from Microsoft products.

11. Glossary

Attribute
An attribute is a container for a piece of data in an entity. Microsoft Dynamics CRM/Dynamics 365 supports a wide variety of attribute types.

SharePoint
SharePoint is a web application platform in the Microsoft Office server suite. SharePoint combines various functions. In combination with Microsoft Dynamics CRM/Dynamics 365, document management is in focus.

CRM MetaData
Microsoft Dynamics CRM 2016, Microsoft Dynamics CRM Online and Dynamics 365 use a metadata driven architecture to provide the flexibility to create custom entities and additional system entity attributes. This structure also makes upgrades and the transportation of customizations easier. The data structure can change without requiring any change to code in the Microsoft Dynamics CRM/Dynamics 365 applications.

Relationship
A relationship defines an association between two entities: one-to-many, many-to-one, many-to-many, and self-referential.

Entity
An entity is a container for data, like a table in a traditional database. Each entity contains a set of attributes. For Microsoft Dynamics CRM/Dynamics 365, there are a set of entities that exist when you first install. Some of these are customizable. In addition, you can create custom entities to contain business data.

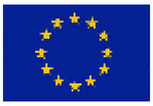
Form Fields
Source

Watermarks
Watermarks are text or pictures that appear behind document text. They often add interest or identify the document status, such as marking a document as a Draft. You can see watermarks in Print Layout view and Full Screen Reading view or in a printed document.
Source

12. List of Figures

13. Contact

For further technical questions, please visit our blog or contact support@mscrm-addons.com. For sales and licensing questions please contact office@mscrm-addons.com or the corresponding contact information below.



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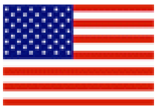

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