



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

Getting Started with DocumentsCorePack TemplateDesigner for Dynamics 365

January 2022

DocumentsCorePack TemplateDesigner
(How to work with DocumentsCorePack TemplateDesigner for Dynamics 365)

The content of this document is subject to change without notice. "Microsoft" and "Microsoft Dynamics 365" are registered trademarks of Microsoft Inc. All other product- and company names mentioned are trademarks of their respectful owners.

Content

1	Getting started with DocumentsCorePack TemplateDesigner	3
1.	How to create an address block with account information.....	4
2.	List of all products from this quote	5
3.	Static text at the bottom.....	9
4.	Company Header and Footer with pictures.....	10
	Result	11
2	List of figures	12
3	Contact.....	12

Preamble

This documentation is intended to guide you through the generation of ...

Target Audience

This guide is intended for users applying search queries with PowerSearch who have the following minimum skills:

- Basic Microsoft Dynamics CRM Knowledge
- Maintaining and configuring a Microsoft CRM Organization

Supported Web Browsers and versions

Supported Web Browsers:

- Internet Explorer 10 and higher
- Chrome
- Edge
- Firefox

One of the following versions of Microsoft Dynamics CRM must be available:

- Microsoft Dynamics CRM Server 2015/2016
- Microsoft Dynamics 365
- Microsoft Dynamics CRM Online

Purpose of DocumentsCorePack TemplateDesigner?

DocumentsCorePack Templates facilitates – among other things - the creation and modification of DocumentsCorePack Templates in Microsoft Dynamics CRM/Dynamics 365. It has predefined fields, so-called

Mail Merge Fields. These are references to attributes in the Microsoft Dynamics CRM/Dynamics 365- system (For example Company, Address, Contact, ...).

Templates can be created for each MS Dynamics CRM/Dynamics 365 entity (For example Contact, Opportunities...).

They facilitate the generation of documents.

For example:

1. Account-templates
2. Quote- and invoice-templates
3. Marketing-list-templates for multi-mails etc.

Basically, there are two different types of templates (deprecated Word Standard and Office Open XML).

We recommend you to use the DocumentsCorePack Templates (docx) only because they are not limited to a single data source. Due to this fact, our DCP Templates can resolve any relationships between the entities. In the course of the next chapters, you will learn more about the basics of DocumentsCorePack template designer, how to create a completely new template and how to handle already created templates.

1 Getting started with DocumentsCorePack TemplateDesigner

This getting started guide will show you how to design a simple template for quoting out of Dynamics 365 (Dataverse). It covers the following topics:

1. Address block with account information
2. List of all products from this particular quote
3. Static text at the bottom
4. Company Header and Footer with pictures

In case you need detailed information, have a closer look at the [documentation section](#) or in the [knowledgebase](#).

Please note: To design templates you will need to install the [DocumentsCorePack Template designer](#), the [installation guide](#) will help you.

1. How to create an address block with account information

Step 1: Open a Word document.

- 1 Navigate to the www.mscrm-addons.com ribbon.
- 2 Click **[Insert MailMerge Fields]**.
- 3 DocumentsCorePack TemplateDesigner- task pane opens.
- 4 Select the type for the template (this is the table(entity) you want to load data from). Since we want to create a quote, we have chosen the quote entity.

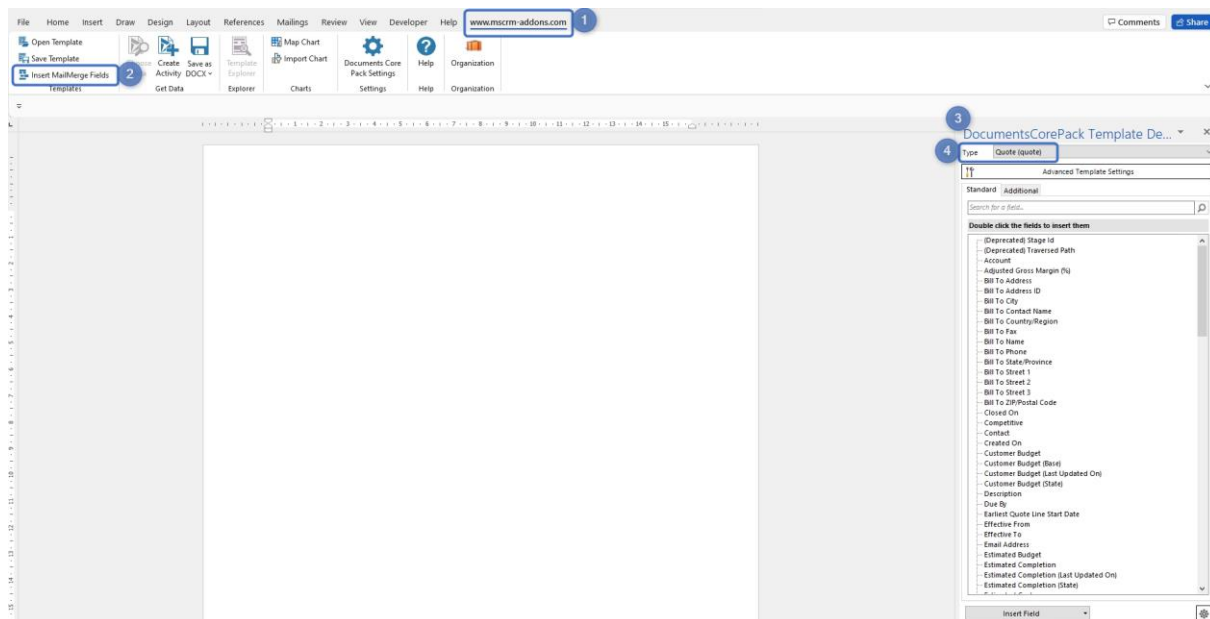


Figure 1: Word document with opened DCP TemplateDesigner

Step 2: Search in the task pane of the DocumentsCorePack TemplateDesigner and have a look for “Potential Customer (Account)”, expand this field and insert all fields you require from the account record with a doubleclick.

Example:

```
Customer:  
<<customerid_account name>>  
<< customerid_account_address1_composite>>
```

2. List of all products from this quote

Step 1: How to create a new relationship from quote to products

To display a list of all products in this quote can be done in 3 simple steps:

1. Create a new relationship from quote to products
2. Insert the fields to the template
3. Format table and fields

Switch from the "Standard"-tab to the ① "Additional-tab" and with a click on ② "Add Relationship/Entity" you can see that there are predefined relationships like ③ "Quote Products". The taskpane will automatically be filled with all fields of your product entity.

Let's try that. If you want to create a relationship of your own have a look in [this video](#).

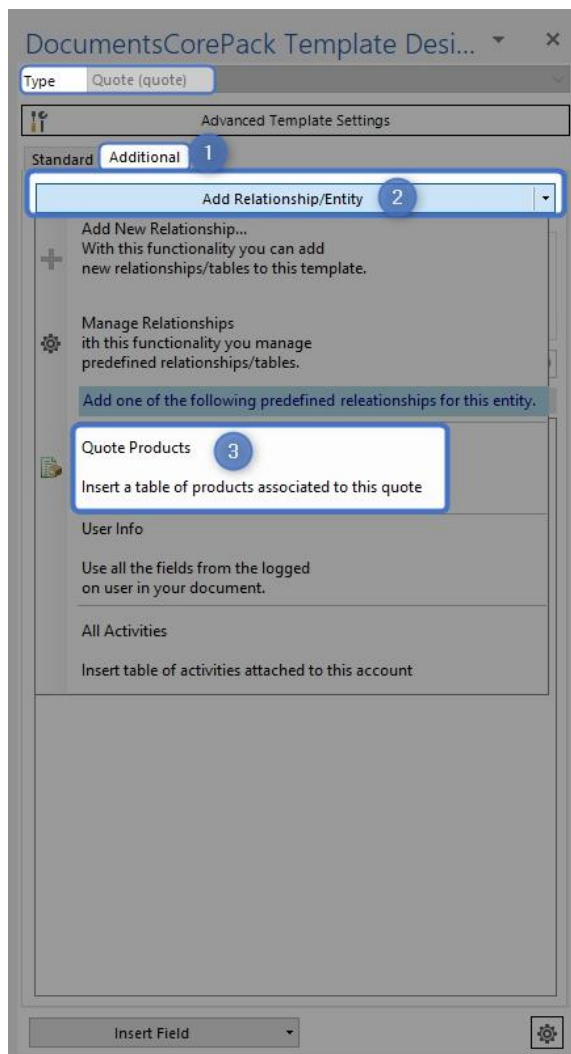


Figure 2: Predefined Relationship

Step 2: How to insert the fields to the template.

You can see in the "Existing Tables" your created relationship. Navigate to the corresponding field and make a double click on "Product - Name" to create your table.

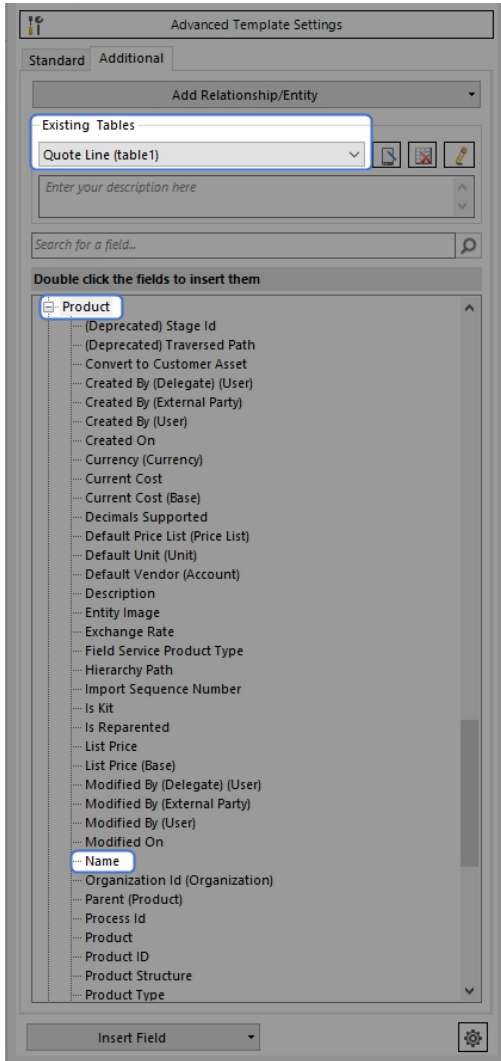


Figure 3: Fields from the product entity

This window opens and provides functionalities to optimize the product table. Confirm.

Insert new table

How should the table appear?

There are three possibilities how the field from this related entity should be inserted.

Insert a new Table with a row per related record

Create table header and/or footer?

Table with header

Table with footer

How many columns should be created?

Split header

Split footer

2

Insert a List separated by

Delimiters

Semicolons Commas Newlines Others

Insert the field from the first related record without a table.

OK Cancel

Figure 4: Optimize the table

The table is created. The table have a header and a footer and 2 columns where the header is splitted.

Customer:

<<customerid_account_name>>

<<customerid_account_address1_composite>>

<<quoteid_productid_name>>	

Figure 5: Created table

Now a header text and other fields you want to show in your quote can be added. In our case have added the "Price per Unit"-field from the quote product and the "totalamount"-field from the quote:

Please note: Make sure that the cursor is set where you want to enter the fields.

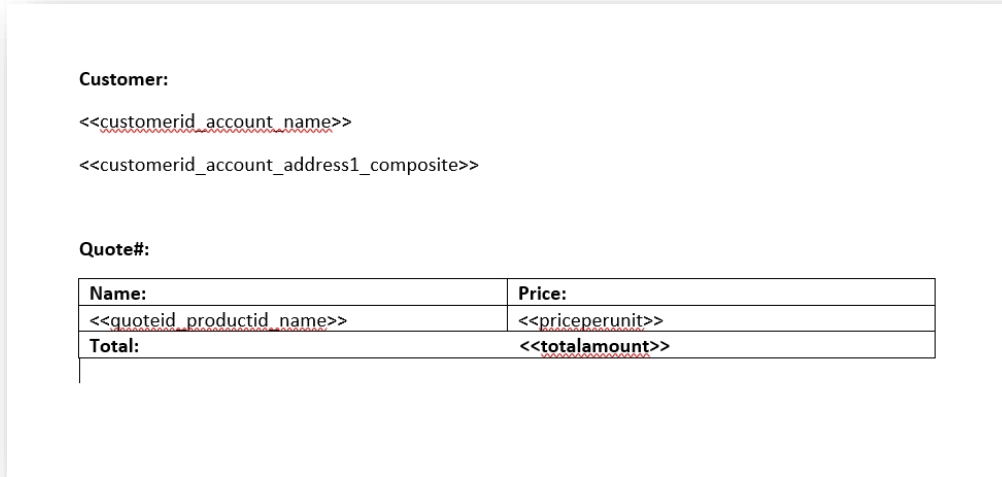


Figure 6: Table ready for formatting

Step 3: How to format the table and fields

Please note: All Microsoft formatting options are applying to the DocumentsCorePack TemplateDesigner.

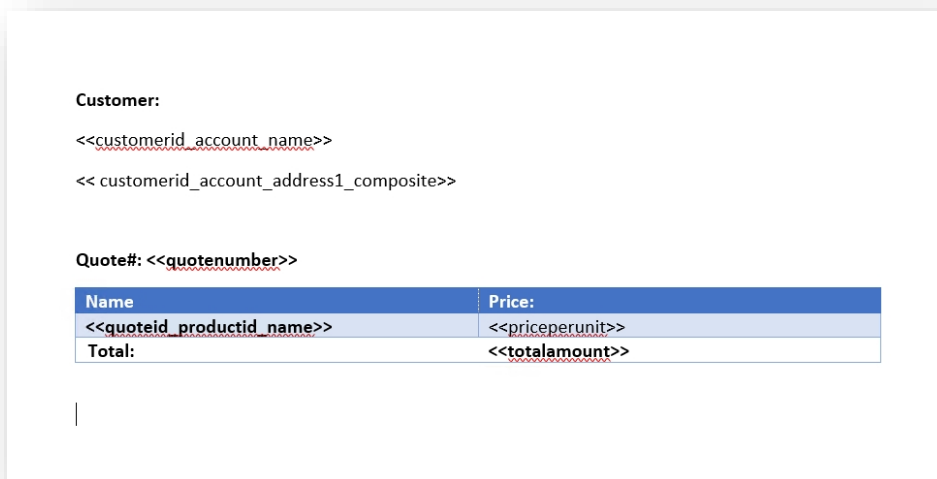


Figure 7: Table Design

3. Static text at the bottom

Step 1: How to add static text like Terms & Conditions. To add such text blocks just insert the whole text into the template. We recommend inserting it into a table because it provides better formatting options. Learn [here](#) how to store the text in your Dynamics 365.

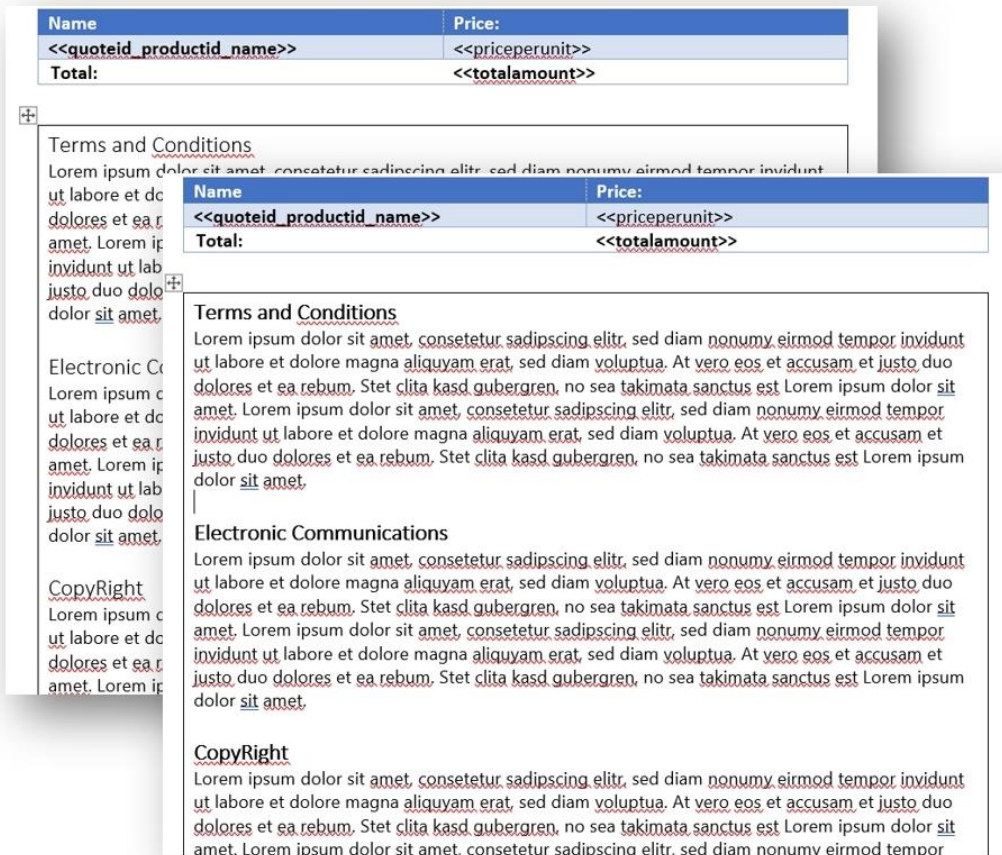


Figure 8: Insert and format Terms & Conditions

4. Company Header and Footer with pictures

Step 1: How to add Company header and footer. All standard word features can be used to edit the documents header and footer. Text and Pictures, Logos etc. can also be added.

Example Header and Footer:

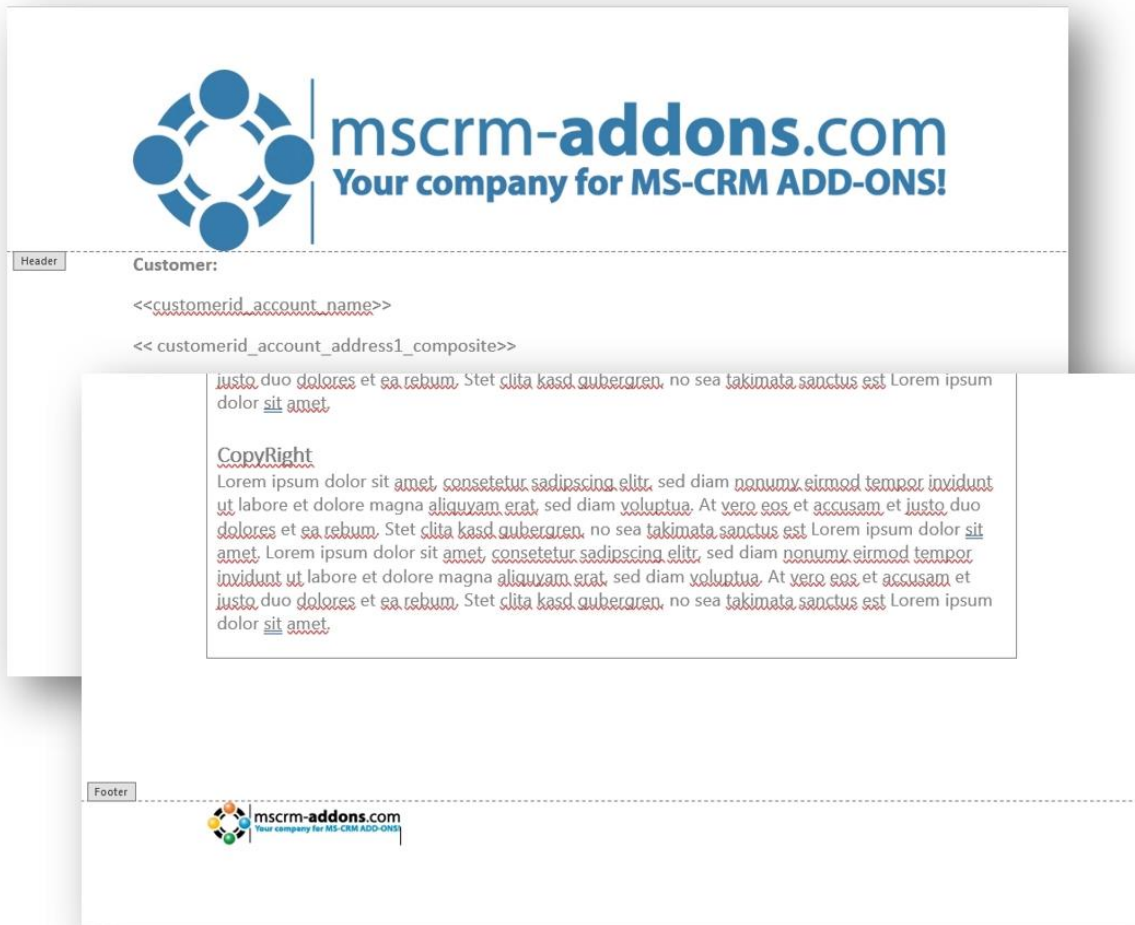


Figure 9: Example Header and Footer

Step 2: ① Save and ② merge your template.

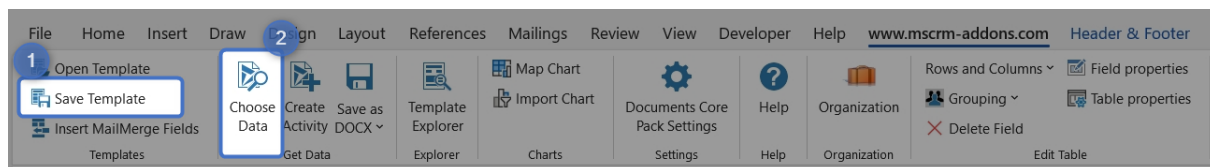


Figure 10: Save and merge template

Result

If you are not sure how to test a template, learn [here](#) more.

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

Customer:
Fabrikam, Inc. (sample)
7995 Edwards Ave.
Lynnwood, TN 58299
U.S.

Quote#: QUO-01003-T7C2K4

Name	Price:
ArmBand 100	\$1,250.00
AssemblyMaestro Camera Array	\$2,690.00
Universal Hard Drive	\$1,520.00
Total:	\$5,460.00

Terms and 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, 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.

Electronic Communications
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, consetetur sadipscing elitr, sed diam nonumy eirmod tempor

Figure 11: Result

2 List of figures

Figure 1: Word document with opened DCP TemplateDesigner	4
Figure 2: Predefined Relationship	5
Figure 3: Fields from the product entity	6
Figure 4: Optimize the table	7
Figure 5: Created table.....	7
Figure 6: Table ready for formatting	8
Figure 7: Table Design.....	8
Figure 8: Insert and format Terms & Conditions	9
Figure 9: Example Header and Footer	10
Figure 10: Save and merge template	10
Figure 11: Result.....	11

3 Contact

For further technical questions, please visit our blog <http://blogs.mscrm-addons.com> or contact support@mscrm-addons.com.

For sales and licensing questions please contact office@mscrm-addons.com, or the corresponding contact information below.



Headquarter – Europe

PTM EDV-Systeme GmbH
Bahnhofgürtel 59
A-8020 Graz
Austria

Tel Austria +43 316 680-880-0
Fax +43 316 680-880-25

Support:
7AM - 8PM GMT+1 (Monday-Friday)

Sales:
+43 316 680 880 14
sales@mscrm-addons.com
www.ptm-edv.at
www.mscrm-addons.com



Headquarter – US

mscrm-addons.com Corp
1860 North Rock Springs Rd
Atlanta, GA 30324
United States

Tel US +1 404.720.6066

Support:
9AM - 6PM EST (Monday-Friday)

Sales:
+1 404 720 6046
mark.watson@mscrm-addons.com
www.mscrm-addons.com