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# DocumentsCorePack Template Designer Feature Update

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# DocumentsCorePack



## Powerful document Generation and Processing:

- Simple UI (User-driven Dialog)
- One-Click Actions: simplify and standardize
- Workflow Automation & Scheduler

## MS Word Template Designer:

- 1:Many, Many:1 and Many:Many relationships
- Support for multi-level data resolution
- Support for Complex documents (Pictures, images, subdocuments, etc.)



Available on  
Microsoft AppSource

<https://bit.ly/2DEQ5Lp>

The screenshot shows the Microsoft Word interface with the Documents Core Pack Settings dialog open. The 'Open Template' dialog is also open, displaying a table of templates and a preview of a document template.

Template Name	Created On	Subject	Category
Quote_Base.docx	2/26/2019 12:27:14 PM		
Quote_QR_Template.docx	2/26/2019 12:27:14 PM		
QuoteWithGrouping_Base.docx	2/26/2019 12:27:13 PM		
UGQuote_bkp.docx	3/27/2019 6:01:50 AM		

The 'Open Template Version' dialog is also open, displaying a table of template versions.

Template Name	Created On	Subject	Category	Keywords
QuoteWithGrouping_Base.docx	3/19/2019 10:47:42 ...			

The 'QuoteWithGrouping\_Base.docx' preview shows a document with a logo and placeholder text for a quote.



# New Template Designer Features

## Time Logic

- Perform calculations with date - fields
  - Add, SubtractRound
  - Round
- Example:
  - Add a certain amount of time
  - difference between two given dates

## Conditional Formatting

- Apply a format to content based on conditions.
  - Every MS Word Style or custom styles possible
- Example:
- Change text color, font, size,...
  - Change table styles

## Template Versioning

- Automatically save each version of a template (backup)
- Restore any previous version as needed

## Template Preview

- Show a preview of the selected template
- Full-view & Detail-view

# Demo & Roadmap

## Demo:

- Scenario 1:
  - Help! I have an error on my template and need to restore it!
- Scenario 2:
  - Create an Opportunity Report using Conditional Formatting and Time Logic

[ DEMO ]

## Roadmap:

- Template Preview in Dialog
- Comments on template versions
  
- Document Explorer
- Charting
- User-defined date-filters / Reporting

[ ROADMAP ]

# Thank You

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- Help-Center (Live-Chat, Support): <http://www.msrm-addons.com/Support.aspx>
- Don't forget we have an awesome blog at <http://www.msrm-addons.com/Blog>, you'll find it to be a helpful resource!

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