

# DocumentsCorePack Client Template Designer - Getting started

Hello!

Thank you for using <u>DocumentsCorePack Client</u>. This getting started guide will show you how to create a simple quote-template to cover the following content:

- Address block with account information
- List of all products from this particular quote
- Static text at the bottom
- Company Header and Footer with pictures

For detailed information, please take a look at our guides or blog.

Note: DocumentsCorePack is also available for ServerBased. There is no need for a client installation!

*Installation:* For details on how to install DocumentsCorePack Client, please read the <u>installation guide</u>. If DCP Client is already installed, please continue reading.

### How to use DocumentsCorePack Client Template Designer

- 1) Open Word and go to "www.mscrm-addons.com"-tab in the ribbon
- 2) Click on [Insert MailMerge Fields]
- 3) Click [Yes] on the message box
- 4) The Task Pane appears
- 5) Select the type for the Template (this should be the entity of the record you want to merge the template with) in our case its "Quote"

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FILE HOME	INSERT DESIGN	PAGE LAYOUT	REFERENCES	MAILINGS	REVIEW	VIEW	www.mscrm-addons.com
<ul> <li>Open Template</li> <li>Save Template</li> <li>Insert MailMerge Fiel</li> <li>Templates</li> </ul>	elds 2 M Data Activ	CRM Send as Save as vity PDF > DOCX +			Open LOG Delete LOG Open lates Debu	G Files st ∗	~
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PAGE 1 OF 1 0 WORD	S GERMAN (AUSTRIA)				E	1	🛛 🔂 – — – + 130%

6) How to create an adress block with account information: Scroll down the Taskpane and search for "Potential Customer". Expand it and insert all fields needed with a click on [Insert] 7) (Click <u>here</u> for detailed information about the main functionalieites of the "Insert"-button). Add some header lines and the adress block is ready to use.



How to **display list of all products** from this particular quote: This can be done in the 3 simple steps:

- A) Create a new Relationship from Quote to Products
- B) Insert the fields to the template
- C) Format the table and fiels
- A) Create a new Relationship from Quote to Products: Switch from the "Normal"-tab to the "Additional"-tab 8). Click on [New Relationshiop/Entity] to create the conjunction between quote and products.

	DocumentsCorePack Tas • × Select type: Quote •
	Normal Additional Template Settings
Add New Relationship With this functionality you can add new relationships/tables to this template.	New Relationship/Entity
Add one of the following predefined releationships for this entity.	Enter your description here
Quote Products Insert a table of products associated to this quote	9
Use all the fields from the logged on user inyour document.	

9) Select the predefined "Quote Products"-Relationship with a click on it. The Taskpane will automatically be filled with all fields from your products entity.

Normal Additional Template Settings	
New Relationship/Entity	
Existing Tables	
Quote Product (table1) 🗸 🛛 🗸	
Enter your description here	
Amount Amount	

B) Insert the fields to the template: Double click the "Product Name"-field to craete your table and insert the first fields. The following window appears and provides functionalities to optimize the product table.

ہ Hov	Insert new w should the table appear?	table	- • ×						
There	There are three possibilities how the field from this related entity should be inserted.								
⊙ Ir	⊙ 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 sho Split header Split footer	uld be created?						
	sert a List separated by Delimiter:	le.	Cancel						

10) In our case we want a table with Header/Footer and 2 columns. Click on [OK] to insert the table:

<pre><customerid_account_name>&gt; <customerid_account_address1_lir <customerid_account_address1_cc<="" <customerid_account_address1_pr="" pre=""></customerid_account_address1_lir></customerid_account_name></pre>	stalcode>>, <	<customerid< th=""><th>_account_add</th><th>ress1_city&gt;&gt;</th><th></th></customerid<>	_account_add	ress1_city>>	

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 "total amount"-field from the quote:

< <customerid_account_name>&gt;</customerid_account_name>	
< <customerid_account_address1_line1>&gt;</customerid_account_address1_line1>	
<customorid account="" address1="" nostale<="" th=""><th>code&gt;&gt;, &lt;<customerid account="" address1="" city="">&gt;</customerid></th></customorid>	code>>, < <customerid account="" address1="" city="">&gt;</customerid>
<customend_account_addressi_postaic< th=""><th>,</th></customend_account_addressi_postaic<>	,
<customend_account_address1_postale <customerid_account_address1_county< th=""><th></th></customerid_account_address1_county<></customend_account_address1_postale 	

#### C) Format the table and fields: Now you can use all Word functions to format table and text:

Customer:	
< <customerid_account_name>&gt;</customerid_account_name>	
< <customerid_account_address1_line1></customerid_account_address1_line1>	>
<< customerid account address1 postal	code>>, < <customerid account="" address1="" city="">&gt;</customerid>
	/
< <customerid account="" address1="" county<="" th=""><th>&gt;&gt;</th></customerid>	>>
< <customerid_account_address1_county< th=""><th>&gt;&gt;</th></customerid_account_address1_county<>	>>
< <customerid_account_address1_county< th=""><th>&gt;&gt;</th></customerid_account_address1_county<>	>>
/	
< <customerid_account_address1_county name<="" td=""><td>&gt;&gt; Price</td></customerid_account_address1_county>	>> Price
/	

How to **add static text** like Terms & Conditions: To add such text blocks, just insert the whole text into the template. We recommend to insert it into a table, because it provides better formatting options. <u>Note</u>: if you want to store the text in CRM, take a look into our blog article <u>"Insert Static Document"</u>.

Name	Price	
< <quoteid_productid_name>&gt;</quoteid_productid_name>		< <pre>&lt;<pre>ceperunit</pre></pre>
		Total: < <totalamount></totalamount>
Terms and Conditions		
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Now the text can be formatted:

Name Pr	ice
< <quoteid_productid_name>&gt;</quoteid_productid_name>	< <pre>&lt;<pre>ceperunit</pre>&gt;&gt;</pre>
	Total: < <totalamount>&gt;</totalamount>
Thank you for the opportunity to provide this proposa questions regarding this quote, or require any addition	
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How to add **Company Header and Footer with pictures**: 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:

	Company XYZ	хуг
Customer: < <customerid_account_ &lt;<customerid_account_ &lt;<customerid_account_ &lt;<customerid_account_< th=""><th>_ address1_line1&gt;&gt; address1_postalcode&gt;&gt;, &lt;<customerid_account< th=""><th>t_address1_city&gt;&gt;</th></customerid_account<></th></customerid_account_<></customerid_account_ </customerid_account_ </customerid_account_ 	_ address1_line1>> address1_postalcode>>, < <customerid_account< th=""><th>t_address1_city&gt;&gt;</th></customerid_account<>	t_address1_city>>

### Example Footer:



## 11) Now Save and Merge your Template:

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FILE HOME IN	SERT DESIGN PAGE LAYOUT F	REFERENCES MAILINGS	REVIEW VIEW w	ww.mscrm-addons.com 🔹 🔍
Open Template     Save Template     L+ Insert MailMerge Fields	Choose CRM Data CRM Data	Documents Core Pack Settings	Open LOG Folder Delete LOG Files Open latest *	
Templates	Get MS CRM Data	Settings Help	Debug	^

## License Manager

All our Add-Ons come with a 14-days trial license. Once received the license file from our supportteam, open the License Manager to install it.

### Contact

We hope our product is to your full satisfaction and a useful supplement to your business activities. If you have questions to the product please send an email to support@mscrm-addons.com Tel US +1 404.720.6066 | Tel Austria +43 316 680-880-0 | www.mscrm-addons.com