DocumentsCorePack Client Template Designer - Getting started

Hello!

Thank you for using DocumentsCorePack Client. 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
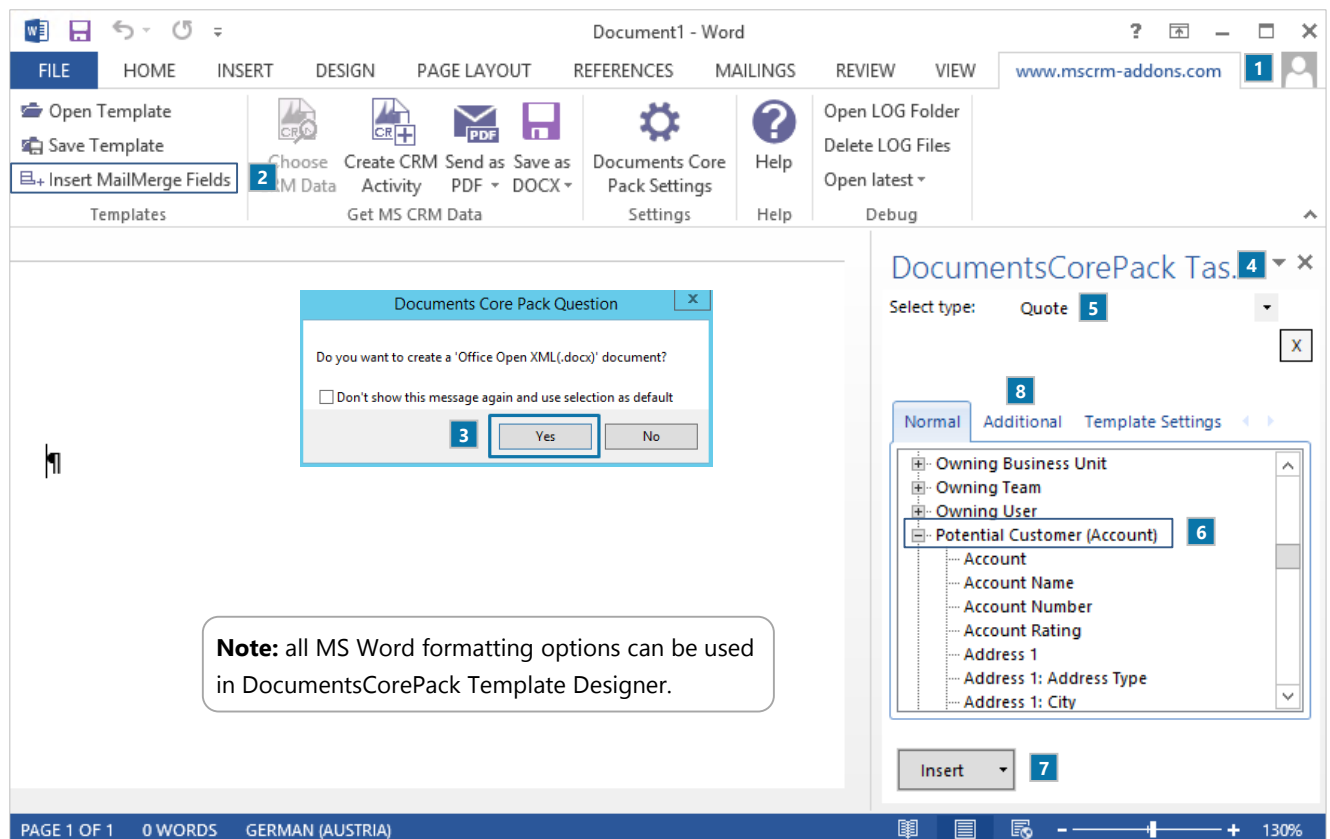- Static text at the bottom
- Company Header and Footer with pictures

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 installation guide. 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"

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 here for detailed information about the main functionalieites of the "Insert"-button). Add some header lines and the adress block is ready to use.
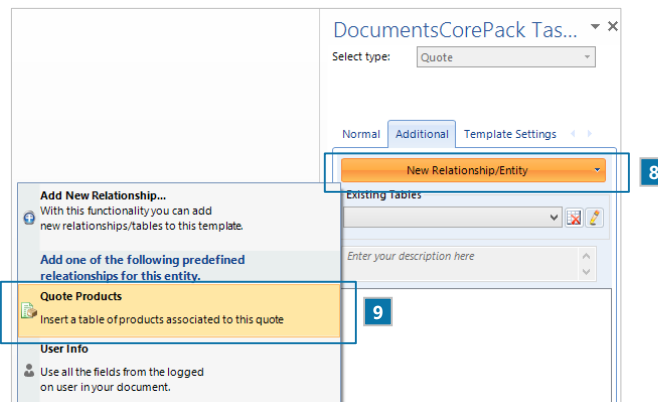
Example:

Customer:
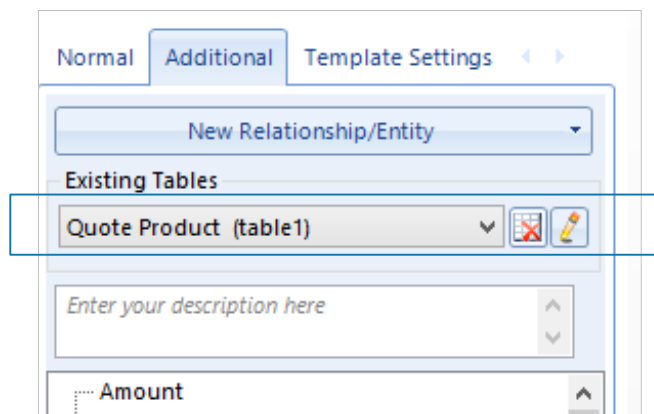<<customerid_account_name>>
<<customerid_account_address1_line1>>
<<customerid_account_address1_postalcode>>, <<customerid_account_address1_city>>
<<customerid_account_address1_county>>|

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
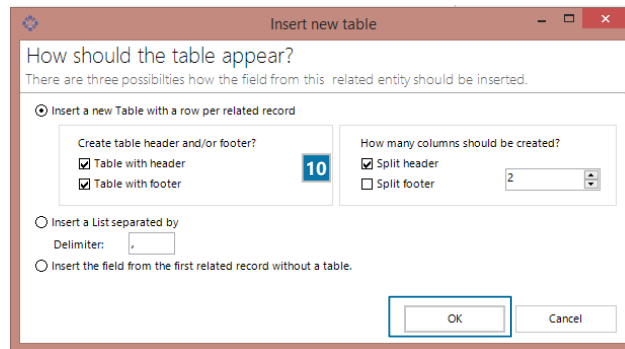C) Format the table and fiels

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.

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.

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.

10) In our case we want a table with Header/Footer and 2 columns. Click on [OK] to insert the 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 "total amount"-field from the quote:

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

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>.

Now the text can be formatted:

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:
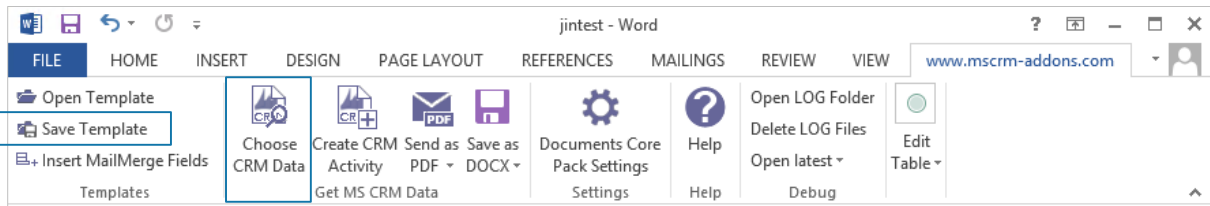
Example Header:

Example Footer:

11) Now Save and Merge your Template:

License Manager

All our Add-Ons come with a 14-days trial license. Once received the license file from our support-team, 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