

## DocumentsCorePack TemplateDesigner User Guide for Dynamics 365 August 2023



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MSCrm-addons.com

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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 multimails, 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.

File Home Insert	Draw Design Layout	References	Mailings Revi	ew View Develope	er Help	www.mscrm-add	lons.com
<ul> <li>Dpen Template</li> <li>Save Template</li> <li>Insert MailMerge Fields</li> </ul>	Choose Send as Save as Data PDF > DOCX >	Template Explorer	태 Map Chart 값 Import Chart	DocumentsCorePack Settings	<b>?</b> Help	Open LOG Folder Delete LOG Files Open latest ~	CRM799607 Onw Connections
Templates	Get Data	Explorer	Charts	Settings	Help	Debug	Environments

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.

	File Home Insert D	oraw Design Layout	References	Mailings Revi	ew View Develope	r Help	www.mscrm-ade	dons.com		Comments (	🖉 Editing 🗙 🔤 S
	🌉 Open Template			🌆 Map Chart	- Ch	2	Open LOG Folder	Æ	🗑 Manage Connections	Rows and Columns ~	🖾 Field Properties
	🖏 Save Template	Choose Send as Save as	Template	🕀 Import Chart	DocumentsCorePack	Help	Delete LOG Files	CRM799607	🖯 New Connection	🌉 Grouping ~	Table Properties
	💁 Insert MailMerge Fields	Data PDF∽ DOCX∽	Explorer		Settings		Open latest ~	~		🗙 Delete Field	
I	Templates	Get Data	Explorer	Charts	Settings	Help	Debug		Environments	Edit	Table
ы	1 · · · · · · · · · · · · · · · · · · ·	- 1 - 1 - 2 - 1 - 3 - 1 -	4 + 1 + 5 + 1	- 6 - 1 - 7 - 1 - 8	++++9 ++++10 ++++11	· · · 12 ·	1 > 13 + 1 + 14 + 1 +	15 - 1	LA LA L		

*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.

File Home Insert	Draw Design Layou	t References	Mailings Revi	iew View Develop	er H 1	www.mscrm-add	dons.com
🎏 Open Template			🔡 Map Chart	- A	2	Open LOG Folder	😭 🔄 Manage Connections
🛱 Save Template	Choose Send as Save a	s Template	🕞 Import Chart	DocumentsCorePack	Help	Delete LOG Files	CRM799607 🖯 New Connection
💁 Insert MailMerge Fields	2 ta PDF v DOCX	<ul> <li>Explorer</li> </ul>		Settings		Open latest ~	~
Templates	Get Data	Explorer	Charts	Settings	Help	Debug	Environments

Figure 3: Open DocumentsCorePack TemplateDesinger

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

File Home Insert Draw I	Design Layout	References Ma	ailings Review	View Developer	Help	www.mscrm-addons.com	🖵 🖉 Edit	ing 🔪 🖻 👻
Open Template     Save Template     Insert MailMerge Fields     Templates	Send as Save PDF ~ DOCX Get Data	as Template Explorer Explorer	Hap Chart	DocumentsCore Settings Settings	Pack	Open LOG Folder           Help         Delete LOG Files           Open latest ~         Help           Help         Debug	Environments ~	~
	2 • 1 • 3 • 1 • 4 • 1 •	5 · 1 · 6 · 1 · 7 ·	1 • 8 • 1 • 9 • 1 • 1	0 · + • 11 · + • 12 · +	Doc	umontsCoroPack	Tomplato D	
					DUC			~ ~
					iype ie	Advanced Tem	alata Cottings	
					il Standa	Advanced Territ	state settings	
					Searc	h for a field		0
					Doub	le click the fields to insert them		~
						Deprecated) Process Stage Deprecated) Traversed Path Account Name Account Number Account Number Account Rating Address 1: Address Type Address 1: Country/Region Address 1: Country/Region Address 1: Country/Region Address 1: Country/Address 1: Country Address 1: Freight Terms Address 1: Freight Terms Address 1: Latitude Address 1: Longitude Address 1: Longitude Address 1: State/Province Address 1: Street 2 Address 1: Street 1 Address 1: Street 2 Address 1: Street 2 Address 1: Street 2 Address 1: UPS Zone Address 1: UPS Zone Address 2: Address Type Address 2: Country/Region Address 2: Country/Region Address 2: Country/Region Address 2: Country/Region Address 2: Fax	2	▲ ◆

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



• 10	Docu	ImentsCorePack Template D	~ ×
(1)	Туре	Account (account)	~
2	Ĩ	Advanced Template Settings	
3	Standard	d Additional 4	
5	Search	for a field	2
	Double	e click the fields to insert them	
6	(D) 	veprecated) Traversed Path tcount tcount Name tcount Number tcount Rating ddress 1 ddress 1 ddress 1: Address Type ddress 1: City ddress 1: Country/Region ddress 1: Country/Region ddress 1: Country ddress 1: Freight Terms ddress 1: Freight Terms ddress 1: ID ddress 1: Latitude ddress 1: Latitude ddress 1: Longitude ddress 1: Name ddress 1: Post Office Box ddress 1: Primary Contact Name ddress 1: Shipping Method ddress 1: State/Province	
	Ac	ddress 1: Street 2 ddress 1: Street 3	~
7		Insert Field 👻	8

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.





### 1.6. Advanced Template Settings

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

🛟 Template Settings	-	
Template Settings	Document Name and Subject	?
Document Name and Subject	DocumentsCorePack Name and Subject	
General	Set document name and subject separate	
Create Activities For	Document Name	
Document Protection	Search for a field	Q
Sub Folder	Select the fields that should be used in your Pattern	
Client Automation Settings	CDeprecated) Process Stage     CDeprecated) Traversed Path     Account	^
Client Automation	Account Name Account Number	
E-Mail (Create Activity)	Account Rating Address 1	
Advanced Settings	3 Address 1: Address Type Address 1: City	
Additional Fields	- Address 1: County	
Sharepoint Metadata		
Dynamic Document Properties		
Remove Watermark		
Debugging		~
Prompts	Your Pattern for this property	
Section Configuration		~
Flasher's Circular		
Electronic Signature		
		~
	ОК	Cancel

Figure 7: Template Settings category

The Advanced Template Settings are divided into 3 main categories:

**1 Template Settings:** These settings describe the document behavior during document generation. This section contains the possibility to define:

**2 Client Automation Settings**: These settings are only for the DocumentsCorePack Template Designer.

**3** 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 <u>this chapter</u>.

Template Settings			×
Template Settings	ि ब्रिच्च Document Name and Subject		2
Document Name and Subject	DocumentsCorePack Name and Subject		
General	Set document name and subject		
Create Activities For	Document Name		
Document Protection	Search for a field		Q
Sub Folder	Select the fields that should be used in your Pattern		
Client Automation Settings	Coprecated) Process Stage     Coprecated) Traversed Path     Account		^
Client Automation	Account Name Account Number		
E-Mail (Create Activity)	Account Rating Address 1		
Advanced Settings	Address 1: Address Type Address 1: City		
Additional Fields	Address 1: Country/Region Address 1: County		
Sharepoint Metadata			
Dynamic Document Properties			
Remove Watermark	- Address 1: Name - Address 1: Post Office Box		
Debugging	Address 1: Primary Contact Name	 	~
Prompts	Your Pattern for this property		~
Section Configuration			
Electronic Signature			
			>
	ОК	Can	cel

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 <u>this article</u>.

#### 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. <u>Learn</u> <u>more</u>.
- **c. Do not export Picture-Link Images as Base64**: With this option you can send E-mails with dynamic images. <u>Learn more</u>.
- **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. <u>Learn more</u>.
- **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.

#### 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 <u>here</u>.
- **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. <u>This guide</u> 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.



Template Settings		3 <u>-</u>		×
Template Settings	General			^
Document Name and Subject	General Settings			
General	Mark as Label Template			
Create Activities For	Do not compress inserted images			
Document Protection	Template Specific V Language			
Sub Folder	2 Images			
Sub rolder	Target Output (DPI) 220 V			
Client Automation Settings	Enable fast Image Conversion			
Client Automation	Compression			
E-Mail (Create Activity)	Do not remove base64 strings from data source			
Advanced Settings	Server Side Properties			
Additional Fields	Workflow Choose a process			
Sharepoint Metadata	Preserve Form Fields for PDFs			
Duranti Decurrent Decurrentias	Do not export Picture-Link Images as Base64			
Dynamic Document Properties	Embed Full Fonts in the PDF Files			
Remove Watermark	Enable Open Path Font support for PDFs			
Debugging	PDF Compliance 1.4 (Default)			
Prompts	Do not add CRM Signature to generated HTML			
Section Configuration	Query (FetchXML) Generation			
Electronic Signature	Use Deep Fetch Analyzer			
	Use Query Expression			
				-
	Note litie			
(	7 Master Template			
	Header/Footer			-
	(static) Choose a value			
	(static) Choose a value			
	Disable Relative UTC Time Option	Pronerties		
	Enable HTML Formatting For Fields	repender		4
	Convert field codes to text after merge (Field codes are not editable in Word for Web)			
	Convert all tables to text			
	Enable whitespace preservation for text fields			~
	OK		Cance	2000

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 <u>this article</u>.

#### 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 <u>this article</u>.

#### 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 <u>this article</u>.



#### 1.6.11 Remove Watermark

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

#### 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 <u>this article</u> 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.

DocumentsCorePack Template D 🗸 🗙
Type Account (account)
Advanced Template Settings
Standard Additional
Add Relationship/Entity 👻
Existing Tables
Contact (table1) 🗸 💽 👔 🤰
Enter your description here
Search for a field
Double click the fields to insert them
<ul> <li>(Deprecated) Process Stage</li> <li>(Deprecated) Traversed Path</li> <li>Account</li> <li>Address 1</li> <li>Address 1: Address Type</li> </ul>
Address 1: City Address 1: Country/Region Address 1: County Address 1: Fax
Address 1: Freight Terms Address 1: ID Address 1: Latitude
Address 1: Longitude Address 1: Name Address 1: Phone V
Insert Field 🔹

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.

Standard	Additional	
1	Add Relationship/Entity	2 -

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

+	Add New Relationship With this functionality you can add new relationships/tables to this template.					
ġ,	Manage Relationships ith this functionality you manage predefined relationships/tables.					
	Add one of the following predefined releationships for this entity.					
Esa	All Contacts					
	Insert a table of contacts associated with this account					
	All Cases					
	Insert a table of cases associated with this account					
	All Opportunities					
	Insert a table of opportunities associated with this account					
EP 1	All Quotes					
ĽŌ	Insert a table of quotes associated with this account					
	All Invoices					
	Insert a table of invoices associated with this account					
	User Info					
	Use all the fields from the logged on user in your document.					
	All Activities					
	Insert table of activities attached to this account					

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.

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



a DocumentsCorePack	– 🗆 X
Configure Fields and Datasource	
In this dialog you are able to configure the fields, tables and relationships you need for y	our document.
Designer FetchXML Result	
Select existing Relation	Advanced Settings
Relationships     O Separate entities	Entity Page Count:
× .	To V (Source) Page: V
show all available fields include lookup fields activate appreciation	From (Target) Distinct
Attributes	(ranget) Use Query Expression
Search for a field	Type Outer
Display Name	Alias *
	Filter
	Add
	Edit
	Delete
	Sorting
	$\uparrow \downarrow$
	Attribute Asc/Desc Relationship name
	* V V
	Records to show 6
	Show all records     Use Dynamics 365     dialog for selection
	O Show a look up window to select a single row (filters are not
Klaudia Ogris (kogris@mscrm-addons.com) ist angemeldet.	<ul> <li>Show a look up window to select multiple rows applied when using this option)</li> </ul>
<	
Link elements	
Add	
Edit	
Delete	
Save as	OK Cancel

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.



A DocumentsCorePack Configure Fields and Datasource In this dialog you are able to configure the fields, tables and relationships you need for yo Designer FetchXML Result Select existing Relation Relationships Separate entities Account -> Activity [regardingobjectid] include lookup fields activate aggregation show all available fields Attributes Attribute Aggregate/Group by Alias Count Activity ×. activityid Countcolumn Process processid Start Date scheduledstart day ---- Aggregation ----. Count Countcolumn Countcolumn(Distinct) Min Max --- Group by ---day week month quarter vear fiscal-period fiscal-year

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 subfunctionalities 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.

Search for a field	P
Double click the fields to insert them	
····· (Deprecated) Process Stage	^
···· (Deprecated) Traversed Path	
Account	
Account Name	
Account Number	
Account Rating	
Address 1	
Address 1: Address Type	
Address 1: City	
Address 1: Country/Region	
Address 1: County	
Address 1: Fax	
Address 1: Freight Terms	
Address 1: ID	
Address 1: Latitude	
Address 1: Longitude	
Address 1: Name	
Address 1: Post Office Box	
Address 1: Primary Contact Name	
Address 1: Shipping Method	
Address 1: State/Province	
Address 1: Street 1	
Address 1: Street 2	
Address 1: Street 3	
Address 1: Telephone 2	
Address 1: Telephone 3	~

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.



*name	$\times$
- Account Name	3
- Address 1: Name	
Address 1: Primary Contact Name 📀 🚶	
Address 2: Name	
Address 2: Primary Contact Name	
Yomi Account Name	
🗄 Billing Account (Account)	
🗄 · Created By (Delegate) (User)	
🗄 · Created By (External Party)	
🗄 · Created By (User)	
E- Currency (Currency)	
🗄 ·· KPI (Account KPI Item)	
🗄 - Last SLA applied (SLA)	
🗄 Master ID (Account)	
🗄 Modified By (Delegate) (User)	
🗄 Modified By (External Party)	
🗄 Modified By (User)	
🗄 ·· Originating Lead (Lead)	
🗄 - Owning Business Unit (Business Unit)	
🗄 ·· Owning Team (Team)	
🗄 - Owning User (User)	
🗄 Parent Account (Account)	
• Preferred Facility/Equipment (Facility/Equipment)	
🗄 Preferred Resource (Deprecated) (Bookable Resource)	
Preferred Service (Service)	
Der Preferred User (User)	
🗄 Primary Contact (Contact)	
🔄 Product Price List (Price List)	~

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.



DocumentsCorePack Template D $~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~$									
Type Account (account)									
Advanced Template Settings									
Standard Additional									
Search for a field									
Double click the fields to insert them									
CDeprecated) Process Stage     CDeprecated) Traversed Path     Account     Account Name     Account Number     Account Rating     Address 1     Address 1: Address Type     Address 1: Address Type     Address 1: Country/Region     Address 1: Country/Region     Address 1: Frax     Address 1: Freight Terms     Address 1: ID     Address 1: Latitude     Address 1: Longitude     Address 1: Longitude     Address 1: Name									
1 Insert Field •									
Insert as Picture Field + 120%									
Insert as Picture-Link-Field									
Insert as Document									
2 Insert as Inspection									
Insert Static Item									
Insert Computed Item									
Insert DocuSian Item									
Insert AssureSign Item									
Insert AdobeSign Item									

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 <u>rich text editor</u>. 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 3<sup>rd</sup> party providers, Microsoft provides Out-of-the-Box capabilities to enter HTML via the **rich text** control as described <u>here</u>.

#### 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 <u>Field Service Inspection</u> 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.





**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.



**2 Insert Advanced String**: The Advanced String property allows you to define a pattern for a dynamically created string.

**3 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.

**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.

**5 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.

**6 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.

**7** 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

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

#### 1.10.10 Insert AdobeSign Item

<u>Adobe Sign</u> 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.

Treeview Settings	
Change the Treeview behavior TreeView Tooltip Name Displayname Fullname Description Type Defaultvalue isCustomfield Entityname ReferencingAttribute ReferencedAttribute	Other Settings 2   Add fields without DisplayName   Mark used Fields in Tree   TreeView starting width:   413   Sample Data   Record:   Choose a value   Highlight Color:   Link data limit (1:N, M:N):   Search   Oxame   DisplayName   DisplayName   Description
	OK Cancel

Figure 23: TaskPane Settings

**1 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



#### **2** 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.

#### **3** 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 <u>this chapter</u>.

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  $\in$  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 <u>following article</u> 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.

🛟 Manage predefin	ed Relationships									-	-		×
Manage pred	defined Relationships												
Edit 1 edefined R	elationship 2												
Select type:	ccount + +	1	Predefined Relation	nship									
Name	Details	Global	Entity	Conta	ct		Ŧ	Global					4
All Contacts	Insert a table of contacts associated with t			5	Edit Relat	tionsh	ip						+ -
All Cases	Insert a table of cases associated with this .	. 📙	Localization		Language		Name		Details				
All Opportunities	Insert a table of opportunities associated		3	▶	(Default)	× /	All Contacts		Insert a table of con	ntacts associated wil	th this a	ccoun	it
All Invoices	Insert a table of quotes associated with the				de	~ ,	Alle Kontakte		Fügen Sie eine Tabe Kontakten ein	elle mit allen < br/>zu	ugehöri	gen	
Subser Info	Use all the fields from the logged < br/> on .	. 🗹				~			Rontakterrein				
All Activities	Insert table of activities attached to this ac.				,								
						_						_	
										Save		Close	e

Figure 26: Manage predefined relationships



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

**2** Plus-, Minus-, Up-, and Down-button: Additional predefined relationships can be created (+), deleted (-), and determined, in which  $(\uparrow,\downarrow)$  order the relationships should appear.

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

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

**5** 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.

Your Pattern for this property	
< <name>&gt;.pos(2,5)</name>	^
	~

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

Condition Field	-	-		×
Condition Field propert	es			?
Condition Field				
Condition Name/Description:	Short Description as part of the Name			
	60 chars left			
Relation:	document			
Conditional block (if statement)				
Create else block	next to each other			
O Conditional Formatting				
Format - Style	✓ New			
Format - Apply to				
Use existing condition	Copy & New			
Negate condition				
Designer				
: 戶目 Group AND [편] Group OR	X Delete			
	~			
	OK		Cance	el

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.

Designer	
편 Group AND 편 Group OR 🗙 Delete	
💿 Status	✓ equals
	equals
	✓ not equals
	has data
	nas data



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.

Status	✓ equals ✓		4		
	Select Values     Select Values     Select Values     Select the values you want	t included.	-	2 ×	
	Available Values	s	elected Values		
	Inactive	>>			
		<<			Cancel

Figure 36: Selection dialog for picklist elements



## Date Field

eated On	<ul> <li>✓ less than</li> </ul>	~ 23/0	3/2023	00:00		•		
	~			Au	gust 2	023		×
		Mo	n Tue	Wed	Thu	Fri	Sat	Sun
		31	1	2	3	4	5	6
		7	8	9	10	11	12	13
		14	15	16	17	18	19	20
		21	22	23	24	25	26	27
		28	29	30	31	1	2	3
		4	5	6	7	8	9	10
			1	T	oday:	23/08	/2023	

Figure 37: Example of a date field

## **String Field**

[ 쥰] Group AND 현] Group OR 🗙 Delete	
Description	✓ begins with ✓ Attention
	~

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.

reated On	✓ less than	√ 16/08/2023 00:00	
escription	<ul> <li>✓ begins with</li> </ul>	~ Attention	
lodified On	✓ less than	~ 16/08/2023 00:00	
Select Row	~		

Figure 39: Select Row

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

✓     begins with     ✓     Attention     3       ✓     Iess than     ✓     16/08/2023 00:00     □▼
✓ less than ✓ 16/08/2023 00:00 □▼

Figure 40: Selected Rows with Grouping options

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

Designer		
E Group AND E Group OR X Delete		
Created On	✓ less than ✓ 16/08/2023 00:00 □▼	
<b>Description</b>	V begins with V Attention	
OR Modified On	→ less than → 16/08/2023 00:00	





### 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.



DateTime Field	I	_		×
🛟 DateT	īme Field prop	oerties		?
Change or set	the DateTime Fi	eld		
Search for a field	d			Q
Select the field	s that should be	used in	your Patt	ern
···· Competitiv	/e			^
Contact				
Customer	n Budget			
Customer	Budget (Base)			
Customer	Budget (Last Up)	dated On	)	
··· Customer	Budget (State)			
Descriptio	n			
Due By				×
Your Pattern fo	r this property			
<< createdon>	>.add(10,days)			$\sim$
				$\sim$
Placeholder Tex	t (Optional):			
Output Format:	DateTime			~
- Formatting op	otions			
Example:				
Format:				~
Culture:				~
	ОК		Canc	el

Figure 44: Function call with parameters

#### **Supported Functions and Operators**

Operator	Sign	Example
Name		
Difference	-	< <duedate>&gt; – DATETIME()</duedate>
		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	Description	Example
specifier		
"d"	The day of the month,	6/1/2009 1:45:30 PM -> 1
	from 1 through 31.	6/15/2009 1:45:30 PM -> 15
"dd"	The day of the month,	6/1/2009 1:45:30 PM -> 01
	from 01 through 31.	6/15/2009 1:45:30 PM -> 15
"ddd"	The abbreviated name	6/15/2009 1:45:30 PM -> Mon (en-US)
	of the day of the week.	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	6/15/2009 13:45:30.617 -> 6
	in a date and time	6/15/2009 13:45:30.050 -> 0
	value.	
"ff"	The hundredths of a	6/15/2009 13:45:30.617 -> 61
	second in a date and	6/15/2009 13:45:30.005 -> 00
	time value.	
"fff"	The milliseconds in a	6/15/2009 13:45:30.617 -> 617
	date and time value.	6/15/2009 13:45:30.0005 -> 000
"ffff"	The ten-thousandths	6/15/2009 13:45:30.6175 -> 6175
	of a second in a date	6/15/2009 13:45:30.00005 -> 0000
	and time value.	
"fffff"	The hundred-	6/15/2009 13:45:30.61754 -> 61754
	thousandths of a	6/15/2009 13:45:30.000005 -> 00000
	second in a date and	
	time value.	
"ffffff"	The millionths of a	6/15/2009 13:45:30.617542 -> 617542
	second in a date and	6/15/2009 13:45:30.0000005 -> 000000
	time value.	



"fffffff"	The ten-millionths of a	6/15/2009 13:45:30.6175425 -> 6175425
	second in a date and	6/15/2009 13:45:30.0001150 -> 0001150
"6"	time value.	6/15/2009 13:45:30.617 -> 6
	of a second in a date	6/15/2009 13:45:30.050 -> (no output)
	and time value.	
"FF"	If non-zero, the	6/15/2009 13:45:30.617 -> 61
	hundredths of a	6/15/2009 13:45:30.005 -> (no output)
	second in a date and	
"CCC"	time value.	6/1E/2000 12·4E·20.617 > 617
rrr	milliseconds in a date	6/15/2009 13:45:30 0005 -> (no output)
	and time value.	0/15/2005 13.45.50.0005 × (10 00(put)
"FFFF"	If non-zero, the ten-	6/1/2009 13:45:30.5275 -> 5275
	thousandths of a	6/15/2009 13:45:30.00005 -> (no output)
	second in a date and	
"FFFFF"	line value.	6/15/2009 13·45·30 61754 -> 61754
	hundred-thousandths	6/15/2009 13:45:30.000005 -> (no output)
	of a second in a date	
	and time value.	
"FFFFFF"	If non-zero, the	6/15/2009 13:45:30.617542 -> 617542
	millionths of a second	6/15/2009 13:45:30.0000005 -> (no output)
	value.	
"FFFFFFF"	If non-zero, the ten-	6/15/2009 13:45:30.6175425 -> 6175425
	millionths of a second	6/15/2009 13:45:30.0001150 -> 000115
	in a date and time	
"a" "aa"	Value.	6/1E/2000 1:4E:20 DM > A D
<u>y, yy</u> "h"	The hour using a 12-	6/15/2009 1.45.30 PM -> A.D.
	hour clock from 01 to	6/15/2009 1:45:30 PM -> 1
	12.	
"hh"	The hour, using a 12-	6/15/2009 1:45:30 AM -> 01
	hour clock from 01 to	6/15/2009 1:45:30 PM -> 01
	17	
	The hour waise = 24	
"H"	The hour, using a 24-	6/15/2009 1:45:30 AM -> 1
"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
"H" "HH"	The hour, using a 24- hour clock from 0 to 23. The hour, using a 24-	6/15/2009       1:45:30       AM       ->       1         6/15/2009       1:45:30       PM ->       13       ->       01         6/15/2009       1:45:30       AM       ->       01
"Н" "НН"	The hour, using a 24- hour clock from 0 to 23. The hour, using a 24- hour clock from 00 to	6/15/2009       1:45:30       AM       ->       1         6/15/2009       1:45:30       PM       ->       1         6/15/2009       1:45:30       AM       ->       01         6/15/2009       1:45:30       PM       ->       1



"K"	Time zone	With DateTime values:
	information.	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	6/15/2009 1:09:30 AM -> 9
	through 59.	6/15/2009 1:09:30 PM -> 9
"mm"	The minute, from 00	6/15/2009 1:09:30 AM -> 09
	through 59.	6/15/2009 1:09:30 PM -> 09
"M"	The month, from 1	6/15/2009 1:45:30 PM -> 6
	through 12.	
"MM"	The month, from 01	6/15/2009 1:45:30 PM -> 06
	through 12.	
"MMM"	The abbreviated name	6/15/2009 1:45:30 PM -> Jun (en-US)
	of the month.	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	6/15/2009 1:45:30 PM -> June (en-US)
	month.	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	6/15/2009 1:45:09 PM -> 9
	through 59.	
"ss"	The second, from 00	6/15/2009 1:45:09 PM -> 09
	through 59.	
"t"	The first character of	6/15/2009 1:45:30 PM -> P (en-US)
	the AM/PM	6/15/2009 1:45:30 PM -> 午 (ja-JP)
	designator.	6/15/2009 1:45:30 PM -> (fr-FR)
"tt"	The AM/PM	6/15/2009 1:45:30 PM -> PM (en-US)
	designator.	6/15/2009 1:45:30 PM -> 午後 (ja-JP)
		6/15/2009 1:45:30 PM -> (fr-FR)
"у"	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
"уу"	The year, from 00 to	1/1/0001 12:00:00 AM -> 01
	99.	1/1/0900 12:00:00 AM -> 00
		1/1/1900 12:00:00 AM -> 00
		6/15/2009 1:45:30 PM -> 09
"ууу"	The year, with a	1/1/0001 12:00:00 AM -> 001
	minimum of three	1/1/0900 12:00:00 AM -> 900
	digits.	



		1/1/1900 12:00:00 AM -> 1900
		6/15/2009 1:45:30 PM -> 2009
"уууу"	The year as a four-	1/1/0001 12:00:00 AM -> 0001
	digit number.	1/1/0900 12:00:00 AM -> 0900
		1/1/1900 12:00:00 AM -> 1900
		6/15/2009 1:45:30 PM -> 2009
"ууууу"	The year as a five-digit	1/1/0001 12:00:00 AM -> 00001
	number.	6/15/2009 1:45:30 PM -> 02009
"z"	Hours offset from	6/15/2009 1:45:30 PM -07:00 -> -7
	zeros.	
"zz"	Hours offset from	6/15/2009 1:45:30 PM -07:00 -> -07
	UTC, with a leading	
	zero for a single-digit	
	value.	
"zzz"	Hours and minutes	6/15/2009 1:45:30 PM -07:00 -> -07:00
	offset from UTC.	
":"	The time separator.	6/15/2009 1:45:30 PM -> : (en-US)
		6/15/2009 1:45:30 PM -> . (it-II)
		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-1R)
"string"	Literal string delimiter.	6/15/2009 1:45:30 PM ("arr:" h:m t) -> arr: 1:45 P
'string'		6/15/2009 1:45:30 PM ('arr:' h:m t) -> arr: 1:45 P
%	Defines the following	6/15/2009 1:45:30 PM (%h) -> 1
	character as a custom	
	tormat specifier.	
	The escape character.	6/15/2009 1:45:30 PM (h \h) -> 1 h
Any other	The character is	6/15/2009 1:45:30 AM (arr hh:mm t) -> arr 01:45 A
character	copied to the result	
	string unchanged.	

#### 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
		Replaces the "#" symbol with the corresponding digit if one is present; otherwise, no digit appears in the result string.	1234.5678 ("#####") -> 1235
"#"	Digit placeholder	Note that no digit appears in the result string if the	0.45678 ("#.##", en-US) - > .46
		corresponding digit in the input string is a non-significant 0. For example, 0003 ("####") - > 3.	0.45678 ("#.##", fr-FR) -> ,46
	Decimal	Determines the location of the	0.45678 ("0.00", en-US) - > 0.46
."	point	decimal separator in the result string.	0.45678 ("0.00", fr-FR) -> 0,46
			Group separator specifier:
		Serves as both a group separator and a number scaling	2147483647 ("##,#", en- US) -> 2,147,483,647
" " '	Group separator and	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.	2147483647 ("##,#", es- ES) -> 2.147.483.647
	number scaling		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
са	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
cs-CZ da	Czech - Czech Republic Danish
cs-CZ da da-DK	Czech - Czech Republic Danish Danish - Denmark
cs-CZ da da-DK div	Czech - Czech Republic Danish Danish - Denmark Dhivehi
cs-CZ da da-DK div div-MV	Czech - Czech Republic Danish Danish - Denmark Dhivehi Dhivehi - Maldives
cs-CZ da da-DK div div-MV nl	Czech - Czech Republic Danish Danish - Denmark Dhivehi Dhivehi - Maldives Dutch
cs-CZ da da-DK div div-MV nl nl-BE	Czech - Czech RepublicDanishDanish - DenmarkDhivehiDhivehiDutchDutch - Belgium
cs-CZ da da-DK div div-MV nl nl-BE nl-NL	Czech - Czech RepublicDanishDanish - DenmarkDhivehiDhivehiDutch - MaldivesDutch - BelgiumDutch - The Netherlands
cs-CZ da da-DK div div-MV nl nl-BE nl-NL en	Czech - Czech RepublicDanishDanish - DenmarkDhivehiDhivehi - MaldivesDutchDutch - BelgiumDutch - The NetherlandsEnglish
cs-CZ da da-DK div div MV nl nl-BE nl-NL en en-AU	Czech - Czech RepublicDanishDanish - DenmarkDhivehiDhivehiDhivehi - MaldivesDutchDutch - BelgiumDutch - The NetherlandsEnglishEnglish - Australia
cs-CZ da da-DK div-DK div-MV div-MV nl nl-BE nl-NL en en-AU en-AU	Czech - Czech RepublicDanishDanish - DenmarkDhivehiDhivehiDhivehi - MaldivesDutchDutchDutch - BelgiumDutch - The NetherlandsEnglishEnglish - AustraliaEnglish - Belize
cs-CZ         da         da-DK         div-DK         div         nlv         nl         nl-BE         nl-NL         en         en-AU         en-BZ         en-CA	Czech - Czech RepublicDanishDanish - DenmarkDhivehiDhivehiOhivehi - MaldivesDutchDutchBelgiumDutch - The NetherlandsEnglishEnglish - AustraliaEnglish - BelizeEnglish - Canada
cs-CZ da da-DK div-DK div-MV div-MV nl div-MV nl nl-BE nl-NL en en en-AU en-AU en-BZ en-CA en-CB	Czech - Czech RepublicDanishDanish - DenmarkDhivehiDhivehiOhivehi - MaldivesDutchDutch - BelgiumDutch - The NetherlandsEnglish - AustraliaEnglish - BelizeEnglish - CanadaEnglish - Caribbean
cs-CZ         da         da-DK         div         div         div-MV         nl         nl-BE         nl-NL         en         en-AU         en-BZ         en-CA         en-IE	Czech - Czech RepublicDanishDanish - DenmarkDhivehiDhivehiMaldivesDutchDutchBelgiumDutch - The NetherlandsEnglishEnglish - AustraliaEnglish - BelizeEnglish - CanadaEnglish - CaribbeanEnglish - Ireland



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-Fl	Finnish - Finland
£	Fuenda
Tr	French
fr-BE	French - Belgium
fr-BE fr-CA	French - Belgium French - Canada
fr-BE fr-CA fr-FR	French - Belgium French - Canada French - France
fr-BE fr-CA fr-FR fr-LU	French - Belgium French - Canada French - France French - Luxembourg
fr-BE fr-CA fr-FR fr-LU fr-MC	French - Belgium French - Canada French - France French - Luxembourg French - Monaco
fr-BE fr-CA fr-FR fr-LU fr-MC fr-CH	French - Belgium French - Canada French - Canada French - France French - Luxembourg French - Monaco French - Switzerland
fr-BE fr-CA fr-FR fr-LU fr-MC fr-CH gl	French - Belgium French - Canada French - Canada French - France French - Luxembourg French - Monaco French - Switzerland Galician
fr fr-BE fr-CA fr-FR fr-LU fr-MC fr-CH gl gl-ES	French - Belgium French - Canada French - Canada French - France French - Luxembourg French - Monaco French - Switzerland Galician Galician - Galician
fr fr-BE fr-CA fr-FR fr-LU fr-MC fr-CH gl gl-ES ka	French - Belgium French - Canada French - Canada French - France French - Luxembourg French - Monaco French - Switzerland Galician Galician - Galician Georgian
fr fr-BE fr-CA fr-FR fr-LU fr-MC fr-CH gl gl-ES ka ka-GE	FrenchFrench - BelgiumFrench - CanadaFrench - CanadaFrench - FranceFrench - LuxembourgFrench - MonacoFrench - SwitzerlandGalicianGalician - GalicianGeorgianGeorgian - Georgia
fr fr-BE fr-CA fr-FR fr-LU fr-MC fr-CH gl gl-ES ka ka-GE de	FrenchFrench - BelgiumFrench - CanadaFrench - CanadaFrench - FranceFrench - FrancoFrench - MonacoFrench - SwitzerlandGalicianGalician - GalicianGeorgianGeorgian - GeorgiaGerman
fr fr-BE fr-CA fr-FR fr-LU fr-MC fr-CH gl gl-ES ka ka-GE ka ka-GE de	French - Belgium French - Canada French - Canada French - France French - Luxembourg French - Monaco French - Switzerland Galician Galician - Galician Georgian - Georgia Georgian - Georgia
fr fr-BE fr-CA fr-FR fr-LU fr-MC fr-CH gl gl-ES ka ka-GE ka ka-GE de de-AT de-DE	French - Belgium French - Canada French - Canada French - France French - Luxembourg French - Monaco French - Switzerland Galician Galician - Galician Georgian Georgian - Georgia German - Austria German - Germany



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
id-ID it	Indonesian - Indonesia Italian
id-ID it it-IT	Indonesian - Indonesia Italian Italian - Italy
id-ID it it-IT it-CH	Indonesian - Indonesia Italian Italian - Italy Italian - Switzerland
id-ID it it-IT it-CH ja	Indonesian - Indonesia Italian Italian - Italy Italian - Switzerland Japanese
id-ID it it-IT it-CH ja ja-JP	Indonesian - Indonesia Italian Italian - Italy Italian - Switzerland Japanese Japanese - Japan
id-ID it it-IT it-CH ja ja-JP kn	Indonesian - Indonesia Italian Italian - Italy Italian - Switzerland Japanese Japanese - Japan Kannada
id-ID it it-IT it-CH ja ja-JP kn kn-IN	Indonesian - Indonesia Italian Italian - Italy Italian - Switzerland Japanese Japanese - Japan Kannada
id-ID it it-IT it-CH ja ja-JP kn kn-IN kk	Indonesian - Indonesia Italian Italian - Italy Italian - Switzerland Japanese Japanese - Japan Kannada Kannada - India
id-ID it it-IT it-CH ja ja-JP kn kn-IN kk kk-KZ	Indonesian - Indonesia Italian Italian - Italy Italian - Switzerland Italian - Switzerland Japanese Japanese - Japan Kannada Kannada Kazakh
id-ID it it it it-IT it-CH ja ja ja-JP kn kn-IN kk kk-KZ kok	Indonesian - Indonesia Italian Italian - Italy Italian - Switzerland Italian - Switzerland Japanese Japanese - Japan Kannada Kannada - India Kazakh Kazakh - Kazakhstan
id-ID it it it it-IT it-CH ja ja ja-JP kn kn-IN kk kk-KZ kok	Indonesian - Indonesia Italian Italian - Italy Italian - Switzerland Italian - Switzerland Japanese Japanese - Japan Kannada Kannada Kannada - India Kazakh Kazakh - Kazakhstan Konkani
id-ID it it-IT it-CH ja ja-JP kn kn-IN kk kk-KZ kok kok-IN ko	Indonesian - Indonesia Italian Italian - Italy Italian - Switzerland Italian - Switzerland Japanese Japanese Japanese - Japan Kannada Kannada Kannada - India Kazakh Kazakh - Kazakhstan Konkani Konkani - India
id-ID it it it it-IT it-CH ja ja-JP kn kn-IN kk kk-KZ kok kok-IN ko	Indonesian - Indonesia Italian Italian - Italy Italian - Switzerland Italian - Switzerland Japanese Japanese - Japan Kannada Kannada - India Kazakh Kazakh Kazakh - Kazakhstan Konkani Konkani - India



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
nb-NO nn-NO	Norwegian (Bokml) - Norway Norwegian (Nynorsk) - Norway
nb-NO nn-NO pl	Norwegian (Bokml) - Norway Norwegian (Nynorsk) - Norway Polish
nb-NO nn-NO pl pl-PL	Norwegian (Bokml) - Norway Norwegian (Nynorsk) - Norway Polish Polish - Poland
nb-NO nn-NO pl pl-PL pt	Norwegian (Bokml) - Norway Norwegian (Nynorsk) - Norway Polish Polish - Poland Portuguese
nb-NO nn-NO pl pl-PL pt pt-BR	Norwegian (Bokml) - Norway Norwegian (Nynorsk) - Norway Polish Polish - Poland Portuguese Portuguese - Brazil
nb-NO nn-NO pl pl-PL pt pt-BR pt-PT	Norwegian (Bokml) - Norway Norwegian (Nynorsk) - Norway Polish Polish - Poland Portuguese Portuguese - Brazil Portuguese - Portugal
nb-NO nn-NO pl pl-PL pt pt-BR pt-PT pa	Norwegian (Bokml) - Norway Norwegian (Nynorsk) - Norway Polish Polish - Poland Portuguese Portuguese - Brazil Portuguese - Portugal Punjabi
nb-NO nn-NO pl pl-PL pt-BR pt-BR pt-PT pa pa-IN	Norwegian (Bokml) - Norway Norwegian (Nynorsk) - Norway Polish Polish - Poland Portuguese Portuguese - Brazil Portuguese - Portugal Punjabi
nb-NO nn-NO pl pl-PL pt-PR pt-BR pt-PT pa pa-IN ro	Norwegian (Bokml) - Norway Norwegian (Nynorsk) - Norway Polish Polish - Poland Portuguese Portuguese - Brazil Portuguese - Portugal Punjabi Punjabi - India Romanian
nb-NO nn-NO pl pl-PL pt-PL pt-BR pt-PT pa pa-IN ro	Norwegian (Bokml) - Norway Norwegian (Nynorsk) - Norway Polish Polish - Poland Portuguese Portuguese - Brazil Portuguese - Brazil Portuguese - Portugal Punjabi Romanian - Romania
nb-NO nn-NO pl pl-PL pt-PL pt-BR pt-BR pt-PT pa pa-IN ro ro ro-RO	Norwegian (Bokml) - Norway Norwegian (Nynorsk) - Norway Polish Polish - Poland Portuguese Portuguese - Brazil Portuguese - Brazil Portuguese - Portugal Punjabi Runjabi - India Romanian Romanian - Romania
nb-NO nn-NO pl pl-PL pt-PL pt-BR pt-BR pt-PT pa pa-IN ro ro-RO ru-RU	Norwegian (Bokml) - Norway Norwegian (Nynorsk) - Norway Polish Polish - Poland Portuguese Portuguese - Brazil Portuguese - Brazil Portuguese - Portugal Punjabi Punjabi - India Romanian Romanian - Romania
nb-NO         nn-NO         pl         pl-PL         pt         pt-BR         pt-PT         pa         pa-IN         ro         ru         ru-RU         sa	Norwegian (Bokml) - Norway Norwegian (Nynorsk) - Norway Polish Polish - Poland Portuguese Portuguese - Brazil Portuguese - Brazil Portuguese - Portugal Punjabi Punjabi - India Romanian Romanian - Romania Russian - Russia



sr-SP-Cyrl	Serbian (Cyrillic) - Serbia
sr-SP-Latn	Serbian (Latin) - Serbia
sk	Slovak
sk-SK	Slovak - Slovakia
sl	Slovenian
sl-Sl	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-Fl	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	The sample data.
Invoice with grouping base	Simple invoice template.	The sample data.



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

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.

	🖬 Save 📓 Save & Close	🕂 New 🗋 Deactivate	🗐 Delete	Create Document	:	🖻 Share
Accou	nt Reconnect.docx - Saved ADDONS.com DocumentsCorePack	Template				
General	Notes Related ~					
Timelin	e				+ 7	፲≣ :
,₽ se	earch timeline					
Ø E	nter a note					Û
SA	Modified on: 5/5/2023 11:55 AM					
-	$\equiv$ Note modified by $ extsf{A}$ System Ad	dministrator			0	È Ó
	🗐 Account Reconnect.docx					
	View mere					~

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 <u>DocumentsCorePack dialog</u>.



Search for templates	All	- 8 6
	All	
Name	General	
Account Reconnect.docx	Temp_DE	al nai
Account Reconnect_DS.docx	Temp_EN	- al
Account_Overview.docx		General
Account_QR_Template.docx		General
Contemporary Letter.docx		General
List of Accounts related to this A	ccount.docx	General
List of Contacts related to this A	ccount.docx	General
MasterTemplateSample.docx		Temp_EN
Meister Vorlage_DE.docx		Temp_DE

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.



😲 Open Template							3 <u>-</u>		×
Open Templat	te								
Use this Dialog to sele	ect a Template for yo	ur MailMerge.							
Select type:	Account	~					0		1
General Temp_DE T	emp_EN								Lis t o
Template Name Account Reconnect.d Account_Overview.do Account_OR_Template Contemporary Letter. InsertAsPictureField.c List of Contacts relate MyFirstLabelTemplate PictureLinkField.docx PictureSavedAsNote.c	locx DS.docx e.docx docx docx ed to this Account.docx ed to this Account.docx e.docx docx	Created On 7/10/2023 11:18:55 AM 8/2/2023 7:16:02 AM 7/10/2023 11:19:01 AM 7/10/2023 11:19:02 AM 7/10/2023 11:19:04 AM 8/31/2023 10:32:17 AM 7/10/2023 11:19:05 AM 8/29/2023 2:38:33 PM 9/4/2023 11:34:09 AM 9/1/2023 9:22:30 AM	Subject	Categony	Keywords	Comments			
						Open	1	Cance	

*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 <u>here</u>.



# 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 <u>here</u>.

# 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 <u>here</u>.

# 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.



DocumentsCorePack Template D 🗸	×
Type Quote (quote)	~
Advanced Template Settings	
Standard Additional	
Search for a field	Q
Double click the fields to insert them	
<ul> <li>(Deprecated) Stage Id</li> <li>(Deprecated) Traversed Path</li> <li>Account</li> <li>Adjusted Gross Margin (%)</li> <li>Bill To Address</li> <li>Bill To Address ID</li> <li>Bill To Contact Name</li> <li>Bill To Contact Name</li> <li>Bill To Country/Region</li> <li>Bill To Fax</li> <li>Bill To Phone</li> <li>Bill To State/Province</li> <li>Bill To Street 1</li> <li>Bill To Street 2</li> <li>Bill To Street 3</li> <li>Bill To ZIP/Postal Code</li> <li>Closed On</li> <li>Competitive</li> <li>Contact</li> <li>Created On</li> <li>Customer Budget (Base)</li> <li>Customer Budget (State)</li> <li>Customer Budget (State)</li> </ul>	*
Insert Field 🔻	j <u>o</u> j

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.



Open Template Save Template Insert MailMerge Fields Templates	Choose Send as Save as Data PDF ~ DOCX~ Get Data	Template Explorer Explorer	Map Chart 값 Import Chart Charts	DocumentsCoreP Settings Settings	ack	Open LOG Folder Help         Open LOG Folder Delete LOG Files Open latest ~         Environments           Help         Debug         ~	Edit Table ~
	1 2 3	4 • 1 • 5 • 1	. 6 . 1 . 7 . 1 . 8	· · · 9 · · · 10 ·	Doc	umentsCorePack Template	≥D ∨
					Туре	Quote (quote)	
					1	Advanced Template Settings	
					Standa	ard Additional	
_					Searc	h for a field	
< <a< td=""><td>ccountid&gt;&gt;</td><td></td><td></td><td></td><td>Dout</td><td>ble click the fields to insert them</td><td></td></a<>	ccountid>>				Dout	ble click the fields to insert them	
						Depresented) Traversed Path Account Adjusted Gross Margin (%) Bill To Address ID Bill To Address ID Bill To Country/Region Bill To Country/Region Bill To Country/Region Bill To Country/Region Bill To Strate Name Bill To Strate/Province Bill To Street 1 Bill To Street 1 Bill To Street 1 Bill To Street 2 Bill To Street 3 Bill To Street 3 Closed On Competitive Contact Created On Customer Budget (Base) Customer Budget (Base) Customer Budget (State)	



**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.

DocumentsCorePack Template D $~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~$
Type Quote (quote) $\checkmark$
Advanced Template Settings
Standard Additional
Add Relationship/Entity 👻
Existing Tables
✓ IN IN I
Enter your description here
Search for a field
Double click the fields to insert them
Insert Field 👻

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**.



CocumentsCorePack			– 🗆 X
Configure Fields and Datasource			
In this dialog you are able to configure the fields, tables and rela	ationships you	need for your document.	
Designer FetchXML Result			
Select existing Relation		Advanced Settings	
Relationships     Separate entities		Entity Quote Booking Produc * TO Page	e Count: 🔍 🗸
Quote -> Quote Booking Product [msdyn_quote]	~	To To Source) Page	e: 🗸 🗸
show all available fields include lookup fields activate	e aggregation	From Isovo (1001) (Target)	Distinct
Attributes			Use Query Expression
Search for a field		O Type Gutter V	
Display Name /	Name	Alias *	
Created On	createdon	Filter	
Currency	msdyn_curren	Add Start Record ID (qid)	
Currency (Base)	msdyn_curren	Edit	
Estimated Cost	msdyn_estima	Delete	
Estimated Sales Amount	msdyn_estima		
EstimatedCost (Base)	msdyn_estima	Sorting	
EstimatedSalesAmount (Base)	msdyn_estima		
Exchange Rate	exchangerate	Attribute Asc/Desc Relations	nip name
Import Sequence Number	importsequen		
Internal Flags	msdyn_interna		
Is Copied	msdyn_iscopie		
Line Order	msdyn_lineord	Perords to show	
Modified On	modifiedon	Show all records	Lico Dunamico 265
Name	msdyn_name	Show all records	dialog for
Owner Owner	ownerid	O Show a look up window to select a single row	selection (filters
Quantity	msdyn_quanti	Show a look up window to select multiple to	when using this
ζ	>		ontion)
Link elements			
Add			
Edit			
Delete			
Save as		ОК	Cancel

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.



DocumentsCorePack Template D $~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~$			
Type Quote (quote) $\checkmark$			
Advanced Template Settings			
Standard Additional			
Add Relationship/Entity 🝷			
Existing Tables			
Quote Booking Product (table1) 🛛 🗸 👔 🧷			
Enter your description here			
Search for a field			
Double click the fields to insert them			
<ul> <li>Created On</li> <li>Currency</li> <li>Currency (Base)</li> <li>Estimated Cost</li> <li>Estimated Sales Amount</li> <li>EstimatedSalesAmount (Base)</li> <li>Exchange Rate</li> <li>Import Sequence Number</li> <li>Name</li> <li>Owner (Owner)</li> <li>Quantity</li> </ul>			
Insert Field 👻			

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.



Insert new table

Inse	ert a new Table with a row per related record		
Inse	Create table header and/or footer? Table with header Table with footer ta List separated by	How many columns si Split header	hould be created?
	Delimiters O Semicolons   Commas  Newlines	O Others	

x

Figure 56: Insert table-dialog

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

<pre>&lt;<quoteid_productid_name>&gt; &lt;<quoteid_productid_description>&gt; &gt; &gt; </quoteid_productid_description></quoteid_productid_name></pre> <pre> </pre> <th>_name&gt;&gt; &lt;<quantity_ tion="">&gt; ovalue&gt;&gt; &lt;<pricepe e="" runit_ovalu="">&gt; &lt;<extendedam ount_ovalue="">&gt;</extendedam></pricepe></quantity_></th>	_name>> < <quantity_ tion="">&gt; ovalue&gt;&gt; &lt;<pricepe e="" runit_ovalu="">&gt; &lt;<extendedam ount_ovalue="">&gt;</extendedam></pricepe></quantity_>
< <extendedamount_ove< td=""><td>&lt;<extendedamount_ovalue>&gt;</extendedamount_ovalue></td></extendedamount_ove<>	< <extendedamount_ovalue>&gt;</extendedamount_ovalue>

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.

Rows	and Columns 🗸 🛛 🗹 Field Prope
Ħ	Split Column
	Merge Columns
8	Insert Columns to the Left
8	Insert Columns to the Right
-	Add Header-Row
	Add Footer-Row
<b>∃</b> ×	Delete Row
EX.	Delete Table

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.

A Datur	n Corporation			
			105	<b>8</b>
3575 157 Redmon	th Ave NE d, 98052		423-	⊠ (1
Dear				
200.7				
Thanks fo	r your interest in our products.	for you the	following	
Regulain	g your request per e-mail, we can a	mer you me	following.	
		Quantity	Price	Tota
1	Assembly Allahusers CDUL			
	Controller	1	13 620,00 €	13.620,00
	Assembly Virtuoso CPU + Controller Assembly Virtuoso Camera Array	1	13 620,00 € 2 450,00 €	13.620,00 2.450,00
	Assembly Virtuoso CPU + Controller Assembly Virtuoso Camera Array Customer Satisfaction - Product Hours	1	13 620,00 € 2 450,00 €	2.450,00
	Assembly Virtuoso CPU + Controller Assembly Virtuoso Camera Array Customer Satisfaction - Product Hours Customer engagement to assure satisfaction and ongoing referenceability - pure COGS no revenue.	1 1 1	13 620,00 € 2 450,00 € ,00 €	13.620,00 2.450,00 .,00
	Assembly Virtuoso CPU + Controller Assembly Virtuoso Camera Array Customer Satisfaction - Product Hours Customer engagement to assure satisfaction and ongoing referenceability - pure COGS no revenue.	1	13 620,00 € 2 450,00 € ,00 €	13.620,00 2.450,00 .,00
	Assembly Virtuoso CPU + Controller Assembly Virtuoso Camera Array Customer Satisfaction - Product Hours Customer engagement to assure satisfaction and ongoing referenceability - pure COGS no revenue.	1	13 620,00 € 2 450,00 € ,00 €	13.620,00 2.450,00 .,00 16.070,00
	Assembly Virtuoso CPU + Controller Assembly Virtuoso Camera Array Customer Satisfaction - Product Hours Customer engagement to assure satisfaction and angoing referenceability - pure COGS no revenue.	1	13 620,00 € 2 450,00 € ,00 €	13.620,00 2.450,00 .,00 16.070,00

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.

L					SCTM- <b>addons</b> .com ar company for MS-CRM ADD-ONSI			
Header <	ar <u>ycontactid_salutation</u> >> ontactid_fullname <sup>&gt;&gt;</sup> line1>>,< <customerid_acc e&gt;&gt;</customerid_acc 	count_address	d_city>> <ccustome< td=""><td><c<u>custome To: &lt;<u>ccustome</u> &lt;<u>ccustome</u> customeric</c<u></td><td>rid_account_name&gt;&gt; omerid_account_primaryco rid_account_primarycontac rid_account_address1_line i_account_address1_postalo</td><td>ntactid_salutatio tid_fullname&gt;&gt; 1&gt;&gt;,&lt;<customerid code&gt;&gt;</customerid </td><td>n»&gt; _account_add</td><td>ress1_city&gt;&gt;&lt;&lt;</td></ccustome<>	<c<u>custome To: &lt;<u>ccustome</u> &lt;<u>ccustome</u> customeric</c<u>	rid_account_name>> omerid_account_primaryco rid_account_primarycontac rid_account_address1_line i_account_address1_postalo	ntactid_salutatio tid_fullname>> 1>>,< <customerid code&gt;&gt;</customerid 	n»> _account_add	ress1_city>><<
Dear ~customerid_account_primaryc tid_fullname>>, Thanks for the interest in our pro CREATEDATE (@ "M/d/yyyy" Product Name	ontactid_salutation>>> <cus ducts. Regarding your req (* MERGEFORMAT }, we d Quantity</cus 	tomerid_accor uest per e-mail can offer you t Price per	unt_primarycontac 1 from { he following: Amount	Dear < <customer ycontactid Thanks for CREATED following:</customer 	tid_account_primarycontact fullname>>, the interest in our products ATE \@ "M/d/yyyy" \* ME	tid_salutation>>< Regarding your RGEFORMAT }	<customerid_a request per e- we can offer y</customerid_a 	ccount_primar mail from { ou the
<pre><pre>conductdescription&gt;&gt;</pre></pre>	<quantity>&gt;</quantity>	Unit «pricepenut	a ~~extendedame	Product Nat	ne	Quantity	Price per	Amount
Discount: («discount	St percentage>>%), < <totaldisco< td=""><td>{ if "«discou ib-Total: «to intamount»" }</td><td>if "<totaltax>&gt;") if "<totaltax>&gt;"0" " if "<totaltax>&gt;"0" " Tax: <totaltax>"]</totaltax></totaltax></totaltax></totaltax></td><td><pre><cproductde< pre=""></cproductde<></pre></td><td>escription&gt;&gt;</td><td><quantity>&gt; Sut</quantity></td><td>Vmt <pre></pre></td><td>&lt;<u>extendedamo</u> unt&gt;&gt; ercentage&gt;&gt;&gt;"0" " lineitemamount&gt;&gt;</td></totaldisco<>	{ if "«discou ib-Total: «to intamount»" }	if " <totaltax>&gt;") if "<totaltax>&gt;"0" " if "<totaltax>&gt;"0" " Tax: <totaltax>"]</totaltax></totaltax></totaltax></totaltax>	<pre><cproductde< pre=""></cproductde<></pre>	escription>>	<quantity>&gt; Sut</quantity>	Vmt <pre></pre>	< <u>extendedamo</u> unt>> ercentage>>>"0" " lineitemamount>>
This quote is valid for XX days fr Psyment conditions: Leven issue doler at <u>gange</u> consecting delore mages <u>alignment</u> and dam y clark add. caburgrave. no sea takimata on <u>Informations</u> of our banks BANE. SOC IBAN: SOC	om today. adiracing elit, sed diam normor olumbas. At yana est e accusan, gitag est Loreen ipsum dolor <u>at a</u> Address: X0 BIC: X0	sz sizmed temper et juste duo deles gggt, Lorem ipsur 20007, 202007 2000000007	invidunt ut labore et nog et es tabum. Stet m delor sit annel.	This quote Payment cond Lorem ipnum dolore magna dita kasi guba Informationa	is valid for XX days from to litions: solor sit anst, consetutut sadipacing, aliquears, no see takima sanctus est. Lo for ur bank	day. elit, sed diam <u>nonumy</u> <sup>1</sup> <u>yato eos et accusan et</u> rem ipsum dolor <u>sit an</u>	Ta: Total: << simmed tempor inn justo duo delerse at, Lorem ipsum d	c <dotaltax>&gt;"} totalamount&gt;&gt; idunt ut labore et et ga telum, Stet olor sit angt.</dotaltax>
It would be a great pleasure to re	ceive your order.			BANK: IBAN:	XXXX	Address: XXX BIC: XXX	000, 200000 000000000	
Yours faithfully, « <u>firstname</u> » «	dastname≫			It would be T Yours fait	e a great pleasure to receive	your order. name>>		
Footer				PTM EDV-Syste Bahnhodgainel S A-8020 Gnaz, Au	me GmbH Tel +43 (0)316 680 880- 9 Fax -43 (0)316 680 880- 301a (HYPERLINK "mailto:office@m	0 Stelermärkische Sp 25 IBAN: AT712081501 BIC/SWIFT: STSPAT 1SC	nkasse Gerich 100811700 FN: 17 2GXX DVR: 9 UID: A	t Grae 3442m 70663 TU45695403

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.

File Home Insert Draw Design Layout References Mailings Review View Developer Help www.mscrm-addons.com 🖓 Comments 🛛 🖉 Editing 🔪 🖻 Share 💉 ¢ 👼 Open Template Do 🔛 🔒 Map Chart ? Open LOG Folder Manage Connections CRM168820 🖯 New Connection Save Template P Import Chart Documents Core Help Pack Settings Delete LOG Files Choose Send as Save as Template Data PDF v DOCX v Explorer 💁 Insert MailMerge Fields Open latest ~ Get Data Charts Settings Help Templates Explorer Environments Debug 1 + 1 + 1 + 1 + 2 + 1 + 3 + 1 + 4 + 1 + 5 + 1 + 6 + 1 + 7 + 1 + 8 + 1 + 9 + 140 + 141 + 142 + 143 + 144 + 145 + 1<sub>24</sub> + (1 + 1 + 1) DocumentsCorePack Template Desi... × Type Account (account) mscrm-addons.com Ĩ Advanced Template Settings Standard Additional Search for a field .... 2 Documents Core Pack Question × Double click the fields to insert them Would you like to proceed and save this document as a "Static Document" If you do not want to save this documen as a "Static document" you have to insert at least one Field with the "Insert MailMerge Fields" dialog. - (Deprecated) Process Stage - (Deprecated) Traversed Path - Account Account Name Account Name Account Number Account Rating Address 1: Address Type Address 1: City Address 1: County/Region Address 1: County/ Address 1: County/ Address 1: Fax Address 1: Fax Yes No Address 1: ID Address 1: Laftude Address 1: Laftude Address 1: Longitude Address 1: Not Office Box Address 1: Post Office Box Address 1: Shipping Method Address 1: Shipping Method Address 1: Street 1 Address 1: Street 2 Address 1: Street 2 Address 1: Telephone 2 Address 1: UPS Zone Address 1: UPS Zone Address 1: UPS Zone Address 2: Address 2 Address 2: Address 2 Address 2: Address 2 Address 2: Address 2 Address 2: Country/Region Address 2: Country Address 2: Country Address 1: Latitude Address 2: Fax Address 2: Freight Terms Address 2: ID Insert Field 🔹 (ĝ) (D) Focus 💷 🔳 🌆 – — 🖬 → age 1 of 1 🛛 💭 German (Austria) Text Predictions: On 📧 Figure 63: Save template option

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

**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**.



File	Home Insert Draw Design	Layout References Mailings Review View Developer Help www.mscrm-addons.com 🖓 Comments 🖉 Editing 🔪	🖻 Share 👻
5	Open Template	🔲 📰 Map Chart 🚓 🔗 Open LOG Folder 🌐 🗟 Manage Connections	
睛	Save Template Choose Send as	Save as Template Ity Import Chart DocumentsCorePack Help Delete LOG Files CRM799607 O New Connection	
-	Template Settings	- n x 1	
	() initiplate settings	Environments	~
	Template Settings	Server Side Properties Documents Core Pack Template D	$\sim \times$
	Document Name and Subject	Workflow Choose a process P ype Account (account)	~
2	General	Preserve Form Fields for PDFs 1 Advanced Template Settings	
	Create Activities For	Do not export Picture-Link Images as Base64	
-		Finded Full Fonts in the PDF Files	
	Document Protection	Enable Quen Path Font support for PDFs      Double click the fields to insert them	
2	Sub Folder	PDF Compliance 1.4 (Default)	^
	Client Automation Settings	Do not add CRM Signature to generated HTML     Account     Account	
	Client Automation	Query (FetchXML) Generation - Account Number	
	E-Mail (Create Activity)	Use Deep Fetch Analyzer - Account Rating - Address 1	
4	Advanced Settings	Use Query Expression Address 1: Address 1: Address 1: Address 1: Address 1: Address 1: City	
	Additional Fields	Note Creation Settings	
	Additional ricity.	Note Title	
	Sharepoint Metadata	3 Note Description Address 1: ID	
i.	Dynamic Document Properties	Master Template - Address 1: Latitude	
-	Remove Watermark	4 Header/Footer Choose a value P - Address 1: Name - Address 1: Name - Address 1: Post Office Box	
	Debugging	5 Separate Footer (static) Choose a value P - Address 1: Primary Contact Name Address 1: Shipping Method	
2	Prompts	Miscellaneous Address 1: State/Province Address 1: Street 1	
	Section Configuration	Disable Relative UTC Time Option View Advanced Properties - Address 1: Street 2	
-	Section conliguration	Enable HTML Formatting For Fields - Address 1: Telephone 2	
	Electronic Signature	Convert field codes to text after merge (Field codes are not editable in Word for Web)	
1		Convert all tables to text - Address 1: UTC Offset	
4		Enable whitespace preservation for text fields	
-		OK Cancel Address 2: City	
-		Address 2: Country/Region	
-		Address 2: Fax Address 2: Freinht Terms	
9	PTM EDV-Systeme GmbH Rabeboforietal 50	Tel +43 (0316 600 500-0 Steinemarkad el Spankarse Gendari, Graz	~
1		(HYPERLINK BIC/SMIFT: STSBATEGOOX DVR: 972668 UIDA DTUSPSGATA	1
		*mailto:office@msc	0

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.



Template Settings			_	🛟 Look Up F	Record	-	- 🗆	×
Template Settings Server Side Properties					c Up Record			
Document Name and Subject	Workflow	Choose a process	0	Enter your se	earch criteria			
General	Preserve Form Fie	elds for PDFs	-	Name:	Search for records			Q
Create Activities For	Do not export Pi	cture-Link Images as Base64		Name		Cre	eated On	^
Document Protection	Embed Full Fonts	in the PDF Files		Labeltemplate_	_Contact_envelope.docx	4/2	28/2023 12:	21 PM
Sub Folder	Enable Open Pat	h Font support for PDFs		List of Account	ts related to this Account.docx	4/2	8/2023 12:	21 PM
Client Automation Settings	PDF Compliance	1.4 (Default) V		List of Account	s related to this Contact.docx s related to this Account.docx	4/2	.8/2023 12: 28/2023 12:	21 PM 20 PM
Client Automation	Do not add CRM	Signature to generated HTML		List of Contacts	s related to this Contact.docx	4/2	8/2023 12:	21 PM
Circle Submation	Query (FetchXML) Ger	neration		MasterTemplat	eSample.docx	5/2	6/2023 11:	22 AM
E-Mail (Create Activity)	Use Deep Fetch	Analyzer		Quel Base.d		4/2	8/2023 12:	21 PM
Advanced Settings	Use Query Expres	ssion		C 4 JR	plate.docx	4/2	8/2023 12:	21 PM
	Note Creation Setting	5		QuoteWithanu	uping_Base.docx	4/2	.8/2023 12:	21 PM
Additional Fields			1.0	TestDoc.docx		5/2	2023 10:0	DU AM
Sharepoint Metadata	Note Litle			TEstEntityI.doc	x x	5/2	26/2023 8:3	8 AM
Dynamic Document Properties	Master Template			< C				>
Remove Watermark	1 Header/Footer	MasterTemplateSample.docx	×	Max. Results:	250 🔹 🗌 Show	all records	Ren	cords: 23
Debugging	Separate Footer (static)	Choose a value	Q			ОК	Ca	ncel
Promote	Miscellaneous					- Address 1:	Street 2	
Section Configuration	Disable Relative Enable HTML For Convert field coo Convert field coo Enable whitespa	UTC Time Option matting For Fields les to text after merge (Field codes are not edi s to text ce preservation for text fields	View Advanced Prop table in Word for W	veties	~	Address 1: Address 1: Address 1: Address 1: Address 1: Address 1: Address 2: Address 2: Address 2: Address 2:	Street 3 Telephone Telephone UPS Zone UTC Offset ZIP/Postal ( Address Ty City Country/Re	2 3 Code pe egion
			OK	Cancel		- Address 2: Address 2:	Fax	

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 <u>here</u>.

#### 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 "mscrmaddons.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 specific term by entering can search for а 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.



Search			×
MailMerge with Dynamics 365 D	ata.		
Use this Dialog to select all Dynamics 365 Object	s vou want to mailmerge.		
Find in: Account			-
General Saved Views			
Scherar Jaaven views		5	1
Name:	Active Records	Remove Fi	Search
1 Junt Name	Primary Contact	Main Phone	^
A Datum Corporation	(contacty	425-555-0182	
A Tom Fabrication		303-555-0134	
A <sup>3</sup> ,n Integration		512-555-0163	
A. Datum Corporation (sample)	Rene Valdes (sample)	555-0158	
Adventure Works	Amos Conger	812-555-0175	
Adventure Works (sample)	Nancy Anderson (sam	555-0152	
Adventure Works Electronics	Brandie Diaz	305-555-0118	
Adventure Works Engineering	Eva Colon	917-555-0127	
Adventure Works Instrumentation	Consuelo Moses	813-555-0127	
Adventure Works Integration	Pearlie Blackburn	412-555-0145	
Alpine Ski House (sample)	Paul Cannon (sample)	555-0157	
Blue Yonder Airlines		+33 123456789	
Blue Yonder Airlines (sample)	Sidney Higa (sample)	555-0154	
City Power & Light		+44 20 7946	
City Power & Light (sample)	Scott Konersmann (sa	555-0155	
City Power & Light Assembly		425-555-7824	
City Power & Light Electronics		425-555-8535	
City Power & Light Engineering		+44 20 7946	
City Power & Light Instrumentation		425-555-1080	~
Max. Results: 240 🌲	Return All		Row count:82
	4	Select	Cancel

Figure 67: Dynamics 365 record to test your template with



The final generated document will show after a few seconds.

January 5, 2022 «address1_line1>> «address1_line2>> «address1_line3>> «address1_city>>, «address1_stateorprovince>> «address1_postate «address1_country>> To Whom It May Concern: We have not heard from you for a while. I wanted to check in and make great experience using our product(s). I will contact you next week to go product(s) you are currently using and to give you details about our upe Sincerely,	January 5, 2022 A Datum Corporation 3575 157th Ave NE Redmond, WA 98052 USA To Whom It May Concern: We have not heard from you for a while. I wanted to check in and make sure that you are still havi great experience using our product(s). I will contact you next week to get your feedback on the product(s) you are currently using and to give you details about our upcoming products. Sincerely,

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.

Configure Fields and Datasource										
In this dialog you are able to configure the fields, tables and re	elationships you need	d for y	our docum	ent.						
Designer FetchXML Result										
Select existing Relation			Advanced	Settings	tine			Dama	t	
Kelationships     Separate entities		>	Entity	Quote	E LIFIC		_ 10	Pagelo	Joung	_
Quote -> Quote Line [quoteid]	~	>	То	quote	id		Source	e) Page:		~
show all available fields include lookup fields activation	ate aggregation		From	quote	id		<ul> <li>(Targe</li> </ul>	t) 🗌 Dis	stinct	
Attributes		-	Type					🗌 Us	e Query Express	sion
Search for a field		Q	Aliac *							
Display Name	/   Name	^	Filter							
Amount	baseamount	- 1	Fitter							
Amount (Base)	baseamount_base			Add	Start R	ecora ID (qia)				
Billing Method	msdyn_billingmetho	d		Edit	_					
Billing Start Date	msdyn_billingstartda	ate	C	elete						
Budget Amount (Base)	msdyn_budgetamou	Int	Sorting							
Bundle Item Association	productassociationi	d							$\wedge \checkmark$	
Cost Amount	msdyn_costamount		A	ttribute	_	Asc/Desc	Relatio	nship name		
Cost Per Unit	msdyn_costpriceper	un	) Ti	tle		Ascending	link: sul	bject_produc	ts	
Cost Price Per Unit (Base)	msdyn_costpriceper	un			~	2	~			
CostAmount (Base)	msdyn_costamount_	ba								
Created On	createdon									4
Customer Budget	msdyn_budgetamou	int	Records	to show						
Description	description		Show	all record	ds			🗌 u	Jse Dynamics 3	65
Duration	msdyn_duration		O Show	a look u	o window to	select a single	row	d	lialog for select	tion
End Date	msdyn_enddate		⊖ Show	a look ut	window to	select multiple	rows	(I a	applied when us	sing
Estimated Margin	msdyn_estimatedma	rgi 🗸	Ŭ					t	his option)	
<		>								
Link elements										
Add product_quote_details: product - productid										
Edit										
Delete										

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.

Reco	rds to show		
() Sł	now all records	Add/	Use Dynamics 365
⊙ Sł	now a look up window to select a single row	Upd	dialog for selection (filters are not
⊖ sł	now a look up window to select multiple rows	Labe	applied when using this option)
Colu	mn Order		
	Attribute	\	Vidth(px)
	Amount	$\sim$	
<b>F</b> #		~	
	2		

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



Reco	ords to show		_		-
OS	how all records	A	dd/	Use Dynamics 36	5
O Show a look up window to select a single row				dialog for selecti (filters are not	on
⊙ s	how a look up window to select multiple rows	La	be	applied when usi	ng
Cal	ma Order		-	this option)	_
Colu	imn Order				_
	Attribute		Wi	idth(px)	^
	Amount	$\sim$	~ 20		
	Quantity	$\sim$	30		
1	Line Item Number	~	50		~

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.

C Template Settings			<	Connections	Rows and Columns ~	Field Properties	
Template Settings	General		^	nection	🌉 Grouping ~	Table Properties	
Document Name and Subject					X Delete Field	able	~
General 2	General Settings	4		Decumo	unteCoreDock 1	Famanlata D	
Create Activities For	Do not compress inserted images			Type Acco		iempiate D	× ×
Document Protection	Template Specific V			11	Advanced Temp	late Settings	
Sub Folder	Images			Standard Ad	Iditional		
Client Automation Settings	Target Output (DPI) 220 V			Search for a fi	ield		Q
Client Automation	Enable fast Image Conversion			Double click	the fields to insert them		
E-Mail (Create Activity)	Compression			(Depreci	ated) Traversed Path		Î
Adversed Contract	Do not remove base64 strings from data source			Account	Name		
Auvanceu settings	Server Side Properties			Account	Rating		
Additional Fields	Workflow Choose a process.			Address	1 1: Address Type		
Sharepoint Metadata	Preserve Form Fields for PDFs			- Address	1: City		
Dynamic Document Properties	Do not export Picture-Link Images as Base64			- Address - Address	1: Country/Region 1: County		
Remove Watermark	Embed Full Fonts in the PDF Files			Address	1: Fax 1: Freight Terms		
Remote Materinark	Enable Open Path Font support for PDFs			Address	1: ID		
Debugging	PDF Compliance 1.4 (Default)			- Address	1: Longitude		
Prompts	Do not add CRM Signature to generated HTMI			Address	1: Name		
				Address	1: Primary Contact Name		
Section Configuration	Query (FetchXML) Generation			Address	1: Shipping Method		
Electronic Signature	Use Deep Fetch Analyzer			- Address	1: State/Province 1: Street 1		
	Use Query Expression			Address	1: Street 2		
	Nata Cambing Sattings			Address	1: Street 3		~
	Note Creation Settings		~	Ins	sert Field 🔹		(ĝ)
	ОК	Cancel		(D) Focus			+ 160%

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.

Label Template	_		×
Label Template Settings			
Search for a field			P
Select the fields that should be used for sorting			
<ul> <li>(Deprecated) Process Stage</li> <li>(Deprecated) Traversed Path</li> <li>Account</li> <li>Account Name</li> <li>Account Number</li> <li>Account Rating</li> <li>Address 1</li> <li>Address 1: Address Type</li> <li>Address 1: City</li> </ul>			~
Sorting			
Field Name		Des	cending
	ОК	Car	ncel

Figure 75: Optional edit-function

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

File Home Insert I	Draw Design Layout	References	Mailings Revi	ew View Develope	er Help	www.mscrm-ade	dons.com	🖓 Comments
😼 Open Template			Map Chart	\$	0	Open LOG Folder Delete LOG Files	Manage Connections     Manage Connection	Insert Labels Mark as Label Cell
Insert MailMerge Fields	Choose Send as Save as Data PDF ~ DOCX ~			DocumentsCorePack Settings	Help	Open latest ~	CRM799607	🖷 Duplicate Labels
Templates	Get Data	Explorer	Charts	Settings	Help	Debug	Environments	Labels

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**.

Label Options					?	×
Printer information <u>C</u> ontinuous-f P <u>ag</u> e printers	n eed printers <u>T</u> ray:	Default tray (Cass	ette (Auto Se	elect)) 🗸		
Label information	Other/Custo	om	~			
Product number:	mice.com		Label infor Type: Height: Width: Page size:	mation Custom laser 2,54 cm 6,67 cm 21,59 cm × 27,94 cm		
Details	New Label	D <u>e</u> lete		ОК	Car	ncel

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.

File	Home	Insert	Draw	Design	Layout	Reference	ces	Mailings	Revie	w Vie	N De	veloper	Help	www.mscrm-addons.com	Table Design	Layou	ıt
Select	View Gridlines	Properties	Drav Tabl	Eraser	Delete	Insert Above	Insert Below	Insert Left	Insert Right	Merge Cells	Split Cells	Split Table	AutoFit	↓         Height:         2,54 cm         ↓           ↓         ₩idth:         6,67 cm         ↓	☐ Distribute Row ☐ Distribute Colu	s Imns	
	Table	_		Draw		Rows &	Colum	ins	تو ا		Merge			Cell Size		Iي ا	

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.



File	Home	Insert	Draw	Design	Layout	References	Mailings	Review	View	Developer	Help	www.mscrm-ad	dons.com	Table Design	Layout	🖓 Comments
i≣ c i≣a s	)pen Templat ave Template	e	Choo	se Send a	IS Save as	Template	👫 Map Cha	art Chart [	ocument Setti	sCorePack	<b>?</b> Help	Open LOG Folder Delete LOG Files	CRM799607	Hanage C 🖰 New Conr	connections nection	<ul> <li>Insert Labels</li> <li>Mark as Label Cell</li> </ul>
= Ir	nsert iviailivie	rge Fields		Cat Da	DOCX -	Explorer	Charde			ings	Lista	Open latest *	-	Carrieranante		Uplicate Labels
-		• 1 • 1	• 2	- 1 · 3	· 1 · 4	• 1 • 5 •		I. ₩ . I	JEXT 3	III 9 1	· 10 ·		ı · 13 · (1		Docun Type A If Standard Search for	cauers nentsCorePack Ter ccount (account) Advanced Template a field
1 + 2 + 1 + 1 +															Double cl (Dep (Dep Acco Acco Acco Acco	ick the fields to insert them recated) Process Stage recated) Traversed Path unt unt Name unt Number unt Rating
	1}	JEXT }						٩ }	JEXT }	+				1}	Addr Addr Addr Addr Addr Addr Addr Addr	ess 1: Address Type ess 1: Cdty ess 1: Country/Region ess 1: Country ess 1: Frax ess 1: Freight Terms ess 1: D ess 1: Latitude ess 1: Longitude
	1}	IEXT }						٩ }	JEXT }	+				1}	Addr Addr Addr Addr Addr Addr Addr Addr	ess 1: Name ess 1: Pottoffice Box ess 1: Primary Contact Name ess 1: State/Province ess 1: State/Province ess 1: Street 1 ess 1: Street 2 ess 1: Street 3 ess 1: Telephone 2 ess 1: Telephone 3

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.

File Home Insert Draw Design Layout Reference	s Mailings Review View Developer Help www.mscrm-addons	com Table Design Layout 🖓 Comments 🖉 Editing 🗸 🖄 Share 🔹
Bopen Template     Fig Save Template     Save Template     Insert MailMerge Fields     Templates     Get Data     Get Data	Imp Map Chart         Imp Chart	Of Manage Connections     One Connection     One Connection     Dev Connection     Environments
L · # A · · · · · · · · · · · · · · · · ·	· i · 6 · 📇 🏥 · i · 8 · i · 9 · i · 10 · i · 11 · i · 12 · i ·	DocumentsCorePack Template D V
		Type Account (account)
•		Advanced Template Settings
- -		Standard Additional
	{ NEXT }	Search for a field
<cname>&gt; <cemailaddress1>&gt; <caddress1_telephone2>&gt;</caddress1_telephone2></cemailaddress1></cname>		Double click the fields to insert them     Address 1: Country/Region     Address 1: Country/Negion     Address 1: Canty     Address 1: Canty     Address 1: Freight Terms     Address 1: InD     Address 1: InD
{ NEXT }	{ NEXT }	Address 1: Isongitude - Address 1: Name - Address 1: Primay Contact Name - Address 1: Primay Contact Name - Address 1: Sitter Province - Address 1: Sitter 1 - Address 1: Sitter 1 - Address 1: Sitter 2 - Address 1: Sitter 3 - Address 1: Sitter 3 - Address 1: Tireten 2 - Address 1: Tireten 3 - Addre
{ NEXT }	{ NEXT }	Address 1: Telephone 3 - Address 1: UPS Zone - Address 1: UIZ Coffset - Address 1: 2IR/Postal Code - Address 2: Address 1: 2P - Address 2: County/Region - Address 2: County/Region - Address 2: County/Region
{ NEXT }	{ NEXT }	Address 2: Frax - Address 2: Freight Terms - Address 2: Latitude - Address 2: Longitude - Address 2: Nome - Address 2: Nome

*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.

DocumentsCorePack Information							
i	Please ensure that the cursor is placed in the cell with the label to grant a successful duplication! Do you want to continue?						
		Yes	No				

Figure 81: DocumentsCorePack Information

You have successfully created a Label Template.

Home Insert Draw Design Layo	at References Mailings Review View	Developer Help www.mscrm-addons.com Tab	le Design Layout 🖓 Comments 🖉 Editing 👻 🖆 Share
Open Template Save Template Insert MailMerge Fields Templates Get Data	as Template Explorer Chart Explorer Charts Setting	orePack Bis Help Debug En	) Manage Connections ) New Connection Edit Table ~ vironments
· · 誰 · · · 1 · · · 2 · · · 3 · · · 4 · · · 5 · · · 6	· ## # · · 8 · · · 9 · · · 10 · · · 11 · · · 12 · · · 13 ·	- 御·御4・1・15・1・16・1・17・1・18・1・19・1・20・篇・1	DocumentsCorePack Template D $\sim$ >
			Type Account (account)
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±	11		Advanced Template Settings
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< <emailaddress1>&gt;</emailaddress1>	< <emailaddress1>&gt;</emailaddress1>	< <emailaddress1>&gt;</emailaddress1>	Search for a field
< <address1_telephone2>&gt;</address1_telephone2>	< <address1_telephone2>&gt;</address1_telephone2>	< <address1_telephone2>&gt;</address1_telephone2>	Double click the fields to insert them
< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	Address 1: Country/Region     Address 1: County     Address 1: Fax     Address 1: Frax     Address 1: Freight Terms     Address 1: ID     Address 1: Longitude     Address 1: Longitude     Address 1: Longitude
< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	Address 1: Post Office Box     Address 1: Primary Contact Name     Address 1: Shipping Method     Address 1: State/Povince     Address 1: State/Povince     Address 1: Street 1
< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	Address 1: Street 3     Address 1: Telephone 2     Address 1: Telephone 3     Address 1: UPS Zone     Address 1: UPS Zone     Address 1: UPS Coffeet     Address 1: UPS Coffeet     Address 1: 20P/Postal Code
< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	Address 2: Address Type     Address 2: City     Address 2: City     Address 2: Country/Region     Address 2: Country/Region     Address 2: Fax     Address 2: Fax
< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	Address 2: ID     Address 2: Latitude     Address 2: Longitude     Address 2: Longitude     Address 2: Name     Address 2: Point Office Box     Address 2: Primary Contact Name
< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	Address 2: Shipping Method     Address 2: Shipping Vervince     Address 2: Starter 1     Address 2: Street 1     Address 2: Street 2     Address 2: Street 2
			Insert Field 👻

Figure 82: Successfully created Label Template



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

toSave 💽 orr) 🔚 🧐 - 🕚 🛞 - Home Insert Draw Design Layo	Document3 - Word ut References Mailings R	Search eview View Dev	eloper Help ww	w.mscrm-addons.com	Table De	esign Layou	t 🖵 c	Klaudia Og Comments	gns 🚷 —	
er Template e Template et MailMerge Fields Templates Get Data	as (~ Explorer Explorer Explorer Charts	DocumentsCoreP Settings Settings	ack Help Open Help Dele Help	a LOG Folder te LOG Files I latest ~ ~ Debug	9 Mar 607 Nev Environ	nage Connectio w Connection ments	ns Edit Table ~	Labels		
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		Use this Dialog to s	ave a Template for yo	our MailMerge.						1
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< <emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1>	< <emailaddress1>&gt; &lt;<address1_telephone.< td=""><td>Template Name</td><td>remp_ex</td><td>Created On</td><td>Subject C</td><td>ategory Keywo</td><td>ords Comment</td><td>is Re</td><td>econnect.docx</td><td></td></address1_telephone.<></emailaddress1>	Template Name	remp_ex	Created On	Subject C	ategory Keywo	ords Comment	is Re	econnect.docx	
< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone2>&gt;</address1_telephone2></emailaddress1></name>	< <name>&gt; &lt;<emailaddress1>&gt; &lt;<address1_telephone< td=""><td>Account Reconnect Account Reconnect Account_Overview. Account_QR_Templ Contemporary Lett List of Accounts reli</td><td>.docx :_DS.docx docx ate.docx er.docx ated to this Account.doc ated to this Account.doc</td><td><ul> <li>7/10/2023 11:18:55 AM</li> <li>8/2/2023 7:16:02 AM</li> <li>7/10/2023 11:19:01 AM</li> <li>7/10/2023 11:19:02 AM</li> <li>7/10/2023 11:19:02 AM</li> <li>7/10/2023 11:19:05 AM</li> <li>x 7/10/2023 11:19:05 AM</li> </ul></td><td></td><td></td><td></td><td></td><td></td><td></td></address1_telephone<></emailaddress1></name>	Account Reconnect Account Reconnect Account_Overview. Account_QR_Templ Contemporary Lett List of Accounts reli	.docx :_DS.docx docx ate.docx er.docx ated to this Account.doc ated to this Account.doc	<ul> <li>7/10/2023 11:18:55 AM</li> <li>8/2/2023 7:16:02 AM</li> <li>7/10/2023 11:19:01 AM</li> <li>7/10/2023 11:19:02 AM</li> <li>7/10/2023 11:19:02 AM</li> <li>7/10/2023 11:19:05 AM</li> <li>x 7/10/2023 11:19:05 AM</li> </ul>						
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		MyFirstLabelTemplate					Save	-   L	Cancel	
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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.

← 🕅	] Show Chart 🖉 Edit 🖪 Activate 🗋 Deactivate 🗎 Delete   🗸	Create Document	Connect sequence	Ø Geo Code <sup>™</sup> <sub>+</sub> Add to Marketing	List 🔍 Assign 🖻 Share 🗄
My	Active Accounts $\sim$			😨 Edit columns 🛛 🍸	' Edit filters Filter by keyword
0	<sup>g</sup> b Account Name ↑ ∽	Main Phone ~	Address 1: City ~	Primary Contact ~	Email (Primary Contact) ~
0	A Datum Corporation	425-555-0182	Redmond		
0	A Datum Fabrication	303-555-0134	Denver		
0	A Datum Integration	<u>512-555-0163</u>	Austin		
0	A. Datum Corporation (sample)	<u>555-0158</u>	Redmond		
0	Adventure Works	<u>812-555-0175</u>	Bloomington	Amos Conger	
0	Adventure Works (sample)	<u>555-0152</u>	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com
0	Adventure Works Electronics	<u>305-555-0118</u>	Tampa	Brandie Diaz	
0	Adventure Works Engineering	<u>917-555-0127</u>	New York	<u>Eva Colon</u>	
0	Adventure Works Instrumentation	<u>813-555-0127</u>	Tampa	Consuelo Moses	
0	Adventure Works Integration	<u>412-555-0145</u>	Pittsburgh	Pearlie Blackburn	
0	<u>Alpine Ski House (sample)</u>	<u>555-0157</u>	Missoula	Paul Cannon (sample)	someone h@example.com
0	Blue Yonder Airlines	+33 123456789	Paris		
0	Blue Yonder Airlines (sample)	<u>555-0154</u>	Los Angeles	Sidney Higa (sample)	someone_e@example.com
0	<u>City Power &amp; Light</u>	<u>+44 20 7946 9702</u>	London		
0	<u>City Power &amp; Light (sample)</u>	<u>555-0155</u>	Redmond	Scott Konersmann (sample)	someone_f@example.com
0	<u>City Power &amp; Light Assembly</u>	<u>425-555-7824</u>	Seattle		

Figure 84: Marked Accounts in your Dynamics 365

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



Search for templates	Q	All	- 1 0				
Name		Category	Group				
Account Reconnect.doo	x		General				
Account Reconnect_DS	.docx		General				
Account_Overview.doo	(		General				
Account_QR_Template.	docx		General				
Contemporary Letter.do	осх		General				
List of Accounts related	to this Account.docx		General				
List of Contacts related	to this Account.docx		General				
MasterTemplateSample	.docx		Temp_EN				
Meister Vorlage_DE.doo	DX		Temp_DE				
MyFirstLabelTemplate.c	iocx		General				

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**.



DocumentsCore Define your document process	Pack Dialog s. Click here to learn about One-Click Actio	<b>8 / X</b> ns.
Filetype Print document Label Start Position Run workflow	docx ▼         You have no printer configurations         1         DCPDocuSignWorkflow	~
	Crea	te 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.



DocumentsCorePack Dialog	🐞 🥓 🗙 ck Actions.
Here you have the possibility to preview your document.	
AM_Doc_1215750f-d089-459b-9561-1293695c5706.docx	
Click finish to proceed with the following steps	
	Finish

Figure 87: Template Preview

The result should look like the below example.



File Home Insert	Draw Design Layout References I	Mailings Review View Developer H	elp www.mscrm-addons.com	🗅 🔏 Viewing 🗸
Open Template     Save Template     Insert MailMerge Fields     Templates	Choose Send as Save as Data PDF ~ DOCX~	Map Chart Import Chart Charts Settings Help	Open LOG Folder Delete LOG Files Open latest ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~	e Connections onnection
L	■ + + + + + + + + + + + + + + + + + + +	± ·   · 8 ·   · 9 ·   · 10 ·   · 11 ·   · 12 ·   · 13 · ⊯	·#4 · I · 15 · I · 16 · I · 17 · I · 18 · I · 19 · I · 20 · #·	1
-	r.1			
	l Fourth Coffee (sample) someone1@example.com	Fourth Coffee (sample) someone1@example.com	Fabrikam, Inc. (sample) someone4@example.com	
· · · · · · · · · · · · · · · · · · ·	Blue Yonder Airlines (sample) someone5@example.com	City Power & Light (sample) someone6@example.com	Contoso Pharmaceuticals (sample) someone7@example.com	
	Alpine Ski House (sample) someone8@example.com	A. Datum Corporation (sample) someone9@example.com	Coho Winery (sample) someone10@example.com	
10 - 1 - 8 -	A Datum Corporation	A Datum Fabrication	A Datum Integration	
11	Adventure Works	Adventure Works Engineering	Adventure Works Electronics	
H - I	Adventure Works Instrumentation	Adventure Works Integration	Blue Yonder Airlines	
17 - 1 - 16 - 1	City Power & Light	City Power & Light Engineering	City Power & Light Electronics	
81 · - • 61 · - •	City Power & Light Instrumentation	City Power & Light Assembly	City Power & Light Integration	

*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 1 Additional tab, click on the 2 Add Relationship/Entity drop-down menu and click on 3 All Contacts for example. This makes sure that the relation is set.



Doc	umentsCorePack Template D $$
Туре	Account (account) ~
iĩ	Advanced Template Settings
Standa	ard Additional
	Add Relationship/Entity 👻
+	Add New Relationship With this functionality you can add new relationships/tables to this template.
ŵ	Manage Relationships ith this functionality you manage predefined relationships/tables.
	Add one of the following predefined releationships for this entity.
	All Contacts Insert a table of contacts associated with this account
¥	All Cases Insert a table of cases associated with this account
	All Opportunities Insert a table of opportunities associated with this account
Ē	All Quotes Insert a table of quotes associated with this account

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**.



A. Datum Cor Account · Account	poration (sample) - Saved	í.			<b>\$10,0</b> Annua	Create Document	iste	m Administrator r
mmary Project Price	Lists Assets and Locations	Details	Servicing Files Related $\sim$			🔍 Check Access		
Phone	555-0158	ç	▼ OLDER		Activity typop	Connect sequence		
			👩 System Administrator	2/20/2022	Subject	B Process	ir s	uggestions
Fax				2/20/2023		Geo Code		new and stay up to
Website	http://www.adatum.com/	<b>A</b>				Ar Follow		
	http://www.adataht.com/	0				A FOROW		
Parent Account						20 Flow	>	
Relationship Tune					Regarding Creat	🖌 🖊 Sign with DocuSign		
Relationship type	000				Status Reas <b>Co</b> Date	🖌 🧞 Send with DocuSigr	n >	
Product Price List						DS Go To DocuSign		
						📾 Word Templates	> Car	ncel selection
Ticker Symbol						💷 Run Report	>	
Bana 9 235 Cases	Cases active Cases I follow					AS	Arnold Schwarzene	gger 🗹
nnections Entitlements	Marketing Lists Quotes active	0				A	Arthur Curry	
iotes Invoices						5	John Snow	
						0	Klaudia Ogris klaudia.ogris@mscr	m-addon
DRESS						MS	Magne Seier	
Service Address	2137 Birchwood Dr Redmond WA 78214	0				1.6	of 9 (6 Selected)	$\leftarrow$ Page 1 $\rightarrow$

Figure 90: Mark contacts that should be displayed

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

Search for templates	All	- 🔳 🖽 🖬
Name	Category	Group
Account Reconnect.docx		General
Account Reconnect_DS.docx		General
Account_Overview.docx		General
Account_QR_Template.docx		General
Contemporary Letter.docx		General
List of Accounts related to this Account.	docx	General
List of Contacts related to this Account.c	locx	General
MasterTemplateSample.docx		Temp_EN
Meister Vorlage_DE.docx		Temp_DE
MyFirstLabelTemplate.docx		General

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**.

DocumentsCore Define your document process	Pack Dialog s. Click here to learn about One-Click Actio	<b>* / X</b>
Filetype Print document	docx ✔ You have no printer configurations	~
Label Start Position	1	
Run workflow     Run action	DCPDocuSignWorkflow	~
	Crea	te Labels >

Figure 92: Choose file type and label position

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

DocumentsCorePack Dialog	o 🧭 🗶
Here you have the possibility to preview your document.	
AM_Doc_d10d40af-f5db-44e8-b257-fbc22578cd08.docx	
Click finish to proceed with the following steps	
	Finish

Figure 93: Preview



# Step 7: Enjoy your result.

File Home Insert D	Draw Design Layout	References Mailin	gs Review View	Developer Help	www.mscrm-add	dons.com	nments 🔏 Viewing ~
₩ Open Template ₩ Save Template ₩ Insert MailMerge Fields Templates	Choose Send as Save as Data PDF ~ DOCX ~ Get Data	Template Explorer Ch	Chart Documer Set arts Set	tsCorePack tings tings Help	Open LOG Folder Delete LOG Files Open latest ~ Debug	CRM799607 O New	ige Connections Connection ents
Templates	· # 1 · 1 · 1 · 2 · 1 · 3	- 1 - 4 - 1 - 5 - 1 - 6 - 24	B.∭.+.+8+1+9+1+	10 · i · 11 · i · 12 · i · 13	· i≣•#4 · i • 15 · i • 16 ·	· · · 17 · · · 18 · · · · 19 · ·	· 20 · #· ·
	A. Datum Corporat Klaudia Ogris A. Datum Corporat Agatha Christie A. Datum Corporat Arnold Schwarzenegger	tion (sample) tion (sample) tion (sample)	A. Datum Corpo Klaudia Ogris A. Datum Corpo Peter Sellers A. Datum Corpo Rene Valdes (sample)	ation (sample) ation (sample) ation (sample)	A. Datum Cor John Snow A. Datum Cor Magne Seier A. Datum Cor Susan Burk (sample)	poration (sample) poration (sample) poration (sample) )	

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>>

MSCrm-addons.com Your company for MS-CRM ADD-ONSI				
1				
< <accountid>&gt;</accountid>				

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**.

	Add Relationship/Entity	-
+	Add New Relationship With this functionality you can add new relationships/tables to this template.	. 🖬 💈
ġ	Manage Relationships ith this functionality you manage predefined relationships/tables.	् २
	Add one of the following predefined releationships for this entity	
Can	All Contacts Insert a table of contacts associated with this account	
r	All Cases Insert a table of cases associated with this account	
	All Opportunities Insert a table of opportunities associated with this account	
ß	All Quotes Insert a table of quotes associated with this account	

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**.



Designer FetchXML Result						
Select existing Relation		Advanced	Settings		-	
Relationships     O Separate entities		Entity	Activity		TO	Page Count:
Account -> Activity [regardingobjectid]	· · · · · · · · · · · · · · · · · · ·	То	accoun	tid	(Source)	Page:
show all available fields include lookup fields	activate aggregation	From	regardi	ingobjectid	(Target)	Distinct
Attributes		Type	outer		~]	Use Query Express
Search for a field	2	type				
Display Name	/ Name 🔨	Alias *				
Deprecated) Process Stage	stageid	Filter				
(Deprecated) Traversed Path	traversedpath		Add	Start Record ID (qid)		
Activity	activityid		Edit			
Activity Additional Parameters	activityadditionalparan	D	elete			
Activity Status	statecode	Casting				
Activity Type	activitytypecode	Sorting				
Actual Duration	actualdurationminutes	A	ttribute	Asc/	Desc	Priority
Actual End	actualend	*		~		~
Actual Start	actualstart					
All Activity Parties	allparties					
Date Created	createdon	_				
Date Delivery Last Attempted	deliverylastattemptedo	Records	to show			
Date Sent	senton	Show	all records			Use Dunamics 26
Delay activity processing until	postponeactivityproce:	⊖ Show	a look up	, window to calact a cingle	row/	dialog for select
Delivery Priority	deliveryprioritycode	O show	a look up	window to select a single	101	(filters are not
Description	description	O SHOW	а юок ир	window to select multiple	TOWS	this option)
<	,					
Link elements						
Add						
Edit						

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.



ype	Account (accoun	it)	
ĩ		Advanced Template Settings	
Standard	Additional		
		Add Relationship/Entity	÷
Existin	g Tables		
Activit	y (table1)	~	} 🕱 🧷
Enter	your description he	ere	0
Search f	ior a field		Q
Double	click the fields to	insert them	
- Ad - Ad - Ad Du	iivity tual End tual Start e Date		

Step 3: Add further relationships.

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

Docu	mentsCo	prePack	< Templa	ate Desi	gner	$\sim$	2
уре	Account (acco	unt)					
Ĩ		Adva	anced Templa	te Settings			
Standard	Additional	ľ					
		Add	Relationship,	/Entity			•
Existin	g Tables						
Activit	y (table1)				~ [	3 👿	2
Enter 3	our description	here					< >
Search f	or a field						2
Double	click the fields	to insert th	em				
Act	ivity						
- Act	ual End						
Act	ual Start						

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.



ype	Account (account)	
ĩ		Advanced Template Settings
Standard	Additional	
		Add Relationship/Entity
Existin	ig Tables	
Activit	y (table1)	~ 🖪 📓 🤌
Enter	your description here	0
Search f	for a field	J.
Ad Ad Du	tivity tual End tual Start le Date achment - Attachment Number - Entity - File Name - Subject	

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.



CocumentsCorePack						- 🗆 🗙
Configure Fields and Datasource						
In this dialog you are able to configure the fields, tables and	elationships you need for	your docum	ent.			
Designer FetchXML Result						
Select existing Relation		Advanced	Settings			
Relationships Separate entities		Entity	Attachment	5	TO	Page Count: 📉 🗸
Attachment	× ,	То	accountid		(Source)	Page: 🗸 🗸
Attachment	~	From	regardingobjectid		(Target)	Distinct
Attribute		Tuno	outer			Use Query Expression
Attribute Attribute Influence Statistics	Q	Type	outer			
Attribute Map Attribute Value	^	Alias *				
Audio File Audit & Diagnostics Setting	:hmen	Filter				
Auditing		_	Add			
Authoritication Settings	per		Edit			
Authorization Server Auto block rule		1	Delete			
Auto Capture Rule		Sorting				
Available Times	entid	Jorang		In constant		1000000000
Available Times Data Source Azure Service Connection		4	Attribute	Asc/De	sc	Priority
Background Operation basestyle			~			<b>`</b>
Batch Job Bookable Resource						
Bookable Resource Association						
Bookable Resource Booking Bookable Resource Booking Header						
Bookable Resource Booking Quick Note Bookable Resource Booking to Exchange Id Mapping		Record	s to show			
Bookable Resource Capacity Profile		Show	/ all records			Use Dynamics 365
		O Shov	a look up window to select a	single ro	w	dialog for selection (filters are not
Owner      Record Openurite Time	ownerid	O Shov	a look up window to select n	nultiple ro	WS	applied when using
	overwritetime					this option;
Link alamants	,					
Add		10				
Edit						
Dalata						
Save as					Ok	Cancel

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 subfunctionalities 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.



Docum	entsCorePack Template Designer $~~ imes~$
Туре Ас	count (account)
<mark>اا</mark> Standard	Advanced Template Settings
	Add Relationship/Entity 3 -
Existing	Tables
Search for a	field
Double clic	k the fields to insert them

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.

no DocumentsCorePack						– 🗆 X
Configure Fields and Datasource						
Is this dialogy you are able to configure the fields tables and relationships up	nu paod facu	our docum				
The this dialog you are able to configure the fields, tables and relationships yo	bu need for ye	our docum	ent.			
Designer FetchXML Result						
Select existing Relation		Advanced	Settings			
Relationships     O Separate entities		Entity	Conta	d *	TO	Page Count: 📉 🗸
Account -> Contact [parentcustomerid]	~ >	То	accour	ntid 🗸 🗸	(Source)	Page: 🗸 🗸 🗸
Account -> Contact [parentcustomerid]	^	From	parent	tcustomerid 🗸 🗸 🗸	(Target)	Distinct
Account-> Contract [printingcastonicna]			autor			Use Query Expression
Account -> Contract (customeria)	0	Type	outer	×		
Account > Address Instantid		Alias *				
Account -> Address [parendu]	^	Filter				
Account -> Email [emailsender]		Thee				
Account -> Email [regardingobjectid]			Add	Start Record ID (qid)		
Account -> Email [sendersaccount]	site		Edit			
Account -> Entitlement [accountid]	chinai	r.	elete			
Account -> Entitlement [customerid]	stypet		elete			
Account -> Fax [regardingobjectid]		Sorting				
Account -> Case [customerid]	У	Jording				
Account -> Case Resolution [regardingobjectid]	10 T	A	ttribute	Asc/De	esc	Priority
Account -> Invoice [customerid]				~		~
Account -> Lead [cre6f_customer]	100000					- · · · · · ·
Account -> Lead [customerid]	terms					
Account -> Lead [parentaccountid]	sid					
Account -> Letter [regardingobjectid]	e					
Account -> Mailbox Auto Tracking Folder [regardingobjectid]	ude	12 13	9			
Account -> Account KPI item [msayn_accountid]		Records	to show			
Account > Account Project Price List [Insuryn_accountg		Show	all record	ls		Use Dynamics 365
Account -> Actual [msdyn_accountvendor]	one1	() Show	a look up	window to select a single ro	W	dialog for selection
Account -> Actual [msdyn_accounternabi]	ficebo	⊖ Show	a look un	window to select multiple r	2000	(filters are not applied when using
Account -> Agreement [msdyn_billingaccount]	yconta	O show	a look up	window to select multiple is	JWS	this option)
Account -> Agreement [msdyn serviceaccount]	× *					
Account -> Teams Contact Suggestion by Al [msdyn sourcerecord]	-					
Account -> Project Service Approval [regardingobjectid]						
Account -> Booking Alert [regardingobjectid]	~					
Edit						
Delete						
Save as		k.			OF	Cancel

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.

In t Des	his dialog you are able to a igner FetchXML Result	D Datasource configure the fields, tables and	d relationship	you need for <sub>)</sub>	our docum	ent.			
S	elect existing Relation				Advanced	Settings			
0	Relationships     O Separate entities				Entity	Contact		TO	Page Count: 🛛 🗸
1	Account -> Contact [parentcu	ustomerid]		~ `,	То	account	tid 🗸 🗸	(Source)	Page: 🗸 🗸 🗸
	] show all available fields [	] include lookup fields 🛛 🛛 ac	tivate aggregat	on in its second se	From	parento	ustomerid 🗸 🗸	(Target)	Distinct
٢	Attribute	Aggregate/Group by	Alias		Туре	outer	~		Use Query Expression
E	First Name	V Count	firstname		Alias *				
	Created On	× Count	createdon		Filter				
		Countcolumn Countcolumn(Distinct) Min Max Group by day week week month quarter year fiscal-period fiscal-year			Sorting	Edit Delete ttribute	Asc/De	Priority	
					Records Show Show Show	to show all records a look up a look up	window to select a single ro window to select multiple ro	ws	Use Dynamics 365 dialog for selection (filters are not applied when using this option)
L	nk elements								
	Add								
	Edit								

*Figure 106: Set the aggregation functionality* 

Step5:InsertthenewlyresolvedrelationshipNow click somewhere in your template and double-click on the field of the newrelationship on the right side.

As shown in Figure 5, the relationship consists of two parts:

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

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


Insert new table		Environments	2					
How should the table appear?		DocumentsCorePack Template Designer $~~ imes~$						
There are three possibilities how the field from t	his related entity should be inserted.	Type Account (account)	1.8					
Insert a new Table with a row per related record		Advanced Template Settings						
Create table header and/or footer?	How many columns should be created?	Standard Additional						
Table with header	Split header	Add Relationship/Entity						
Table with footer	Split footer	Existing Tables						
O Insert a List separated by		Contact (table1) 🗸 🔯	2					
Delimiters Semicolons  Commas Newlines	Others	Enter your description here	< >					
		Search for a field						
Insert the field from the first related record without	a table.	Double click the fields to insert them						
	OK Cancel	First Name (count)						

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.

File Home Insert I	Draw Design Layout	References Mailings Re	view View Devel	loper ⊢	lelp www.mscrm-	addons.com 🖓 Comments 🖉 Editing 🗸 🖻 Share 👻
<ul> <li>Open Template</li> <li>Save Template</li> <li>Insert MailMerge Fields Templates</li> </ul>	Choose Send as Save as Data PDF ~ DOCX ~ Get Data	Template Explorer Explorer Explorer Charts	Documents Core Pack Settings Settings	<b>?</b> Help	Open LOG Folder Delete LOG Files Open latest ~ Debug	CRM864092 D New Connections CRM864092 D New Connection Environments
· · · · · · · · · · · · · · · · · · ·	3 · i · 4 · i · 5 · i · 6 ·	1 • 7 • 1 • 8 • 1 • 9 • 1 • 10 •	1 + 11 + 1 + 12 + 1 + 13	· · · 14 ·	1 + 15 + 1 + _ + + + + + + + + + + + + + + + +	DocumentsCorePack Template Designer 🗸 🗙
	_					Type Account (account)
< <firstname>&gt;</firstname>						Advanced Template Settings
4						Standard Additional
						Add Relationship/Entity -
						Existing Tables
						Contact (table1) 🗸 🔀 💈
						Enter your description here
						Search for a field
						Double click the fields to insert them
						First Name (count)

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.

File Home Insert Draw Design Layout References Mailings Review View Developer Help www.m	scrm-addons.com 🖓 Comments 🖉 Editing 🔪 🖻 🗸
Image: Construction of the product	Ider Amage Connections CRM168820 New Connection Edit Environments
	$\begin{array}{llllllllllllllllllllllllllllllllllll$
	Advanced Template Settings
	Standard Additional
	Search for a field
	Double click the fields to insert them
< <name>&gt;</name>	Address 1
The state of the s	
< <address1_ine1>&gt;</address1_ine1>	
< <address1_line2>&gt;</address1_line2>	Address 1: Fax
	···· Address 1: Freight Terms ···· Address 1: ID
< <address1_city>&lt;<address1_stateorprovince>&gt;&lt;<address1_postaicode>&gt;</address1_postaicode></address1_stateorprovince></address1_city>	Address 1: Latitude
< <address1_country>&gt;</address1_country>	···· Address 1: Longitude ···· Address 1: Name
	- Address 1: Post Office Box
	Address 1: Primary Contact Name Address 1: Shinping Method
	Address 1: State/Province
	Address 1: Street 1
	Address 1: Street 2 Address 1: Street 3
	Address 1: Telephone 2
	Address 1: ZIP/Postal Code
	Address 2 
	Address 2: City
	Address 2: Country/Region
	- Address 2: County
	- Address 2: Freight Terms
	Address 2: ID
	- Address 2: Name
	Address 2: Post Office Box
	- Address 2: Primary Contact Name
	Address 2 shipping weenod
	Insert Field 👻

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.

File Home Insert	Draw Design Layout	References	Mailings Revi	iew View Deve	eloper H	elp <u>www.mscrm</u>	-addons.com	Contraction Editing -
Open Template     Save Template     Insert MailMerge Fields	Choose Send as Save as Data PDF > DOCX >	Template Explorer	₩ Map Chart Import Chart	Documents Core Pack Settings	() Help	Open LOG Folder Delete LOG Files Open latest ~	€ Manage Connections CRM168820	Edit Table ~
Templates	Get Data	Explorer	Charts	Settings	Help	Debug	Environments	

Figure 111: Save template to Dynamics 365



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

						-
Account	×.					
neral						
Template Name	Created On	Subject	Category	Keywords	Comments	
Account Reconnect.docx	4/28/2023 12:20:54 PM					
Account_Overview.docx	4/28/2023 12:21:04 PM					
Account_QR_Template.docx	4/28/2023 12:20:57 PM					
Contemporary Letter.docx	4/28/2023 12:20:49 PM					
Labeltemplate_Account.docx	4/28/2023 12:20:30 PM					
Labeltemplate_All_Contacts.docx	4/28/2023 12:21:00 PM					
List of Accounts related to this Account.docx	4/28/2023 12:21:02 PM					
List of Contacts related to this Account.docx	4/28/2023 12:20:52 PM					

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.



File Home Insert D	raw Design Layout References Ma	ilings Review View	Developer	Help www.mscrm-	addons.com		
Open Template     Save Template     Insert MailMerge Fie	Choose Send as Save as Data PDF ~ DOCX ~ Explorer	Iap Chart nport Chart Documents C Park Settin	Core Help	Open LOG Folder Delete LOG Files	CRM168820	ection &	vs and Columns ~ 🦉 Grouping ~ 🕅
Templates	Get Data Explorer	Charts Search T · 4 · 1 · MailMern Use this Dialo Find in: General Save	ge with Dy og to select all 2 ed Views	ynamics 365 D Dynamics 365 Object Account	lata. s you want to mailmerge.	9	×
		Name:			Active Records [	Remove Filter	Search
		Account Nan	ie		/ Primary Contact (Contact)	Main Phone	^
	< <name>&gt;</name>	A Datum Cor A Datum Fab	rication			425-555-0182 303-555-0134 512-555-0163	
	< <address1_line2>&gt;</address1_line2>	A. Datum Co Adventure W	rporation (sam orks	ple)	Rene Valdes (sample) Amos Conger	555-0158 812-555-0175	
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		City Power & City Power &	Light Electroni	, cs ing		425-555-8535	
	1	City Power &	Light Instrume	entation		425-555-1080	Pow count:91
		Max. Results:		240 🜲	M Return All	Select	Cancel

Figure 113: Select Dynmaics 365 data for merging the template

## Step 6: After the merge process.

Open Template     Save Template     Insert MailMerge Fields     Templates     Template	Image: Template       Image: Template
< <name>&gt; &lt;<address1_line1>&gt; &lt;<address1_line2>&gt; &lt;<address1_city>&gt;&lt;<address1_city>&gt;&lt;<address1_city>&gt;&lt;<address1_city>&gt;&lt;<address1_city>&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;&lt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;&gt;&gt;&gt;<address1_city>&gt;&gt;&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<address1_city>&gt;&gt;<addr< 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la B I $\cup$ $\Rightarrow$ $\Rightarrow$ $x$ $x$ $x'$ $A_2$ $\models$ $\Rightarrow$ $A_3 \land A^* A^*$
: 1 of 1 0 words 🔟 German (Austria) Text Predic	RedmondWA98052 USA

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.

File Home Insert D	Draw Design Layout	References	Mailings Revi	ew View Dev	veloper H	elp www.mscrm	-addons.com	5		6	
<ul> <li>Open Template</li> <li>Save Template</li> <li>Insert MailMerge Fields Templates</li> </ul>	Choose Send as Save as Data PDF ~ DOCX ~ Get Data	Template Explorer Explorer	Map Chart F Import Chart Charts	Documents Core Pack Settings Settings	() Help Help	Open LOG Folder Delete LOG Files Open latest ~ Debug	CRM168820	Manage Conn New Conn	onnections ection	Rows and Columns	Table Properties
- - - - - - - - - - - - - -	<span="2"><span="2"><span="2"></span="2"></span="2"></span="2">	me>> ssi_line1 dress1_line1> dress1_city>> dress1_count	>> >> < <address1_i< th=""><td>stateorpr 2</td><td>Textfie Field properti Name: Relation: ormatting op Delete line</td><td>Id properties es address1_line1 document tions row If whole line/row If this field is emp</td><td>is empty oty</td><td>0K</td><td>Cancel</td><td>×</td><td></td></address1_i<>	stateorpr 2	Textfie Field properti Name: Relation: ormatting op Delete line	Id properties es address1_line1 document tions row If whole line/row If this field is emp	is empty oty	0K	Cancel	×	

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 <u>here</u> how to add an image field to your Dynamics 365.

A. Datum Co	Save & Close + New ♣ Open org chart	tivate <sup>p</sup> ë	Connect   🗸 🧮 Add to Marketing List	R, Assi
Summary Project Pric	e Lists Assets and Locations Details Servicing	Files F	Related 🗸	
ACCOUNT INFORMATIO	Ν		New Section	
Account Name	* A. Datum Corporation (sample)		ACTIVITIES All (3)	م 🕶
Phone	555-0158	S	▼ LAST WEEK System Administrator	
Fax			AM_Doc_b67f4ebc-e048-4eb4-a27c-56d9c50	Fr 9/1
			System Administrator AM_Doc_7ee588d7-f416-4c0e-b0a9-b43cf8e	Th 8/3
Website	https://cdn.pixabay.com/photo/2021/03/29/11/38/b	<b>#</b>	▼ OLDER	
Parent Account			👸 System Administrator	0 2/20/202
Relationship Type				
Product Price List				
Ticker Symbol				
Image				

Figure 116: Saved picture in image field

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

1 Navigate to the standard tab and look for the location in which you have previously saved the picture.

2 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.

**3** The field in this example is **Image**. Click on it.

4 If you want to insert the **Image** as a Picture Field, open the **Insert Field** dropdown selection, and select **Insert Image as Picture field**.



DocumentsCorePack Template Desig 🗸 🗙
Type Account (account)
Advanced Template Settings
Standard Additional
Search 1 Vd
Double click the fields to insert them
<ul> <li>Entity Image Id</li> <li>Exchange Rate</li> <li>External ID</li> <li>Facebook</li> <li>Fax</li> <li>Follow Email Activity</li> <li>FTP Site</li> <li>COPP. Ont</li> <li>Image</li> <li>3</li> <li>Import sequence Number</li> <li>Industry</li> <li>Last Date Included in Campaign</li> <li>Last On Hold Time</li> <li>Main Phone</li> <li>Market Capitalization (Base)</li> </ul>
Insert Field
Insert 'Image' as Picture-Link-Field
Insert 'Image' as Document
Insert 'Image' as HTML
Insert 'Image' as Inspection
Insert Static Item
Insert Computed Item
Insert DocuSign Item
Insert AssureSign Item
Insert AdobeSign Item

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 dropdown 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.

CocumentsCorePack						- 🗆 X
Configure Fields and Datasource 1						
In this dialog you are able to configure the fields, tables and rel	lationships you need for yo	our docume	ent.			
Color FetchXML Result						
2 at existing Relation		Advanced	Settings			
Relationships     O Separate entities		Entity	Note	Ŧ	то	Page Count: V
Account -> Note [objectid]	~ ``	То	accountid	~	(Source)	Page: 🗸
show all available fields include lookup fields activat	te aggregation	From	objectid		(Target)	Distinct
Attributes						Use Query Expression
Search for a	Q	Type		-		
Display Name /	Name ^	Alias *				
Created On	createdon	Filter				
Description	notetext		Add Start Record ID (	qid)		
Document	documentbody		Edit			
File Name	filename	D	elete			
File Size (Bytes)	filesize	Carting				
Import Sequence Number	importsequencenumbe	Sorting				<b>ΛΨ</b> -
Is Document	isdocument		tribute Asc/De	50	Pelationshi	name
Language ID	langid	*			(clacionsin)	, nume
Mime Type	mimetype					
Modified On	modifiedon					
Note 4	annotationid					
Object Type	objecttypecode	Records	to show			
Owner						
	ownerid	Show	all records			Use Dynamics 365
Prefix	prefix	Show	all records a look up window to select a s	ingle row		Use Dynamics 365 dialog for selection
Prefix     Record Created On	ownerid prefix overriddencreatedon	<ul> <li>Show</li> <li>Show</li> <li>Show</li> </ul>	all records a look up window to select a s	ingle row	re	Use Dynamics 365 dialog for selection (filters are not applied when using
Prefix     Record Created On     Regarding Object Type	ownerid prefix overriddencreatedon objectidtypecode	<ul> <li>Show</li> <li>Show</li> <li>Show</li> </ul>	all records a look up window to select a s a look up window to select mi	ingle row	'S	Use Dynamics 365 dialog for selection (filters are not applied when using this option)
Prefix Record Created On Regarding Object Type	ownerid prefix overriddencreatedon objectidtypecode	<ul> <li>Show</li> <li>Show</li> <li>Show</li> </ul>	all records a look up window to select a s a look up window to select m	ingle row ultiple row	'S	Use Dynamics 365 dialog for selection (filters are not applied when using this option)
Prefix  Record Created On  Regarding Object Type  C Link elements	ownend prefix overriddencreatedon objectidtypecode	<ul> <li>Show</li> <li>Show</li> <li>Show</li> </ul>	all records a look up window to select a s a look up window to select m	ingle row	'S	Use Dynamics 365 dialog for selection (filters are not applied when using this option)
Prefix  Record Created On  Regarding Object Type  C Link elements  Add	ownend prefix overriddencreatedon objectidtypecode	Show Show Show Show	all records a look up window to select a s a look up window to select m	ingle row ultiple row	'5	Use Dynamics 365 dialog for selection (filters are not applied when using this option)
	ownend prefix overriddencreatedon objectidtypecode	<ul> <li>Show</li> <li>Show</li> <li>Show</li> </ul>	all records a look up window to select a s a look up window to select m	ingle row	15	Use Dynamics 365 dialog for selection (filters are not applied when using this option)
	ownend prefix overriddencreatedon objectidtypecode	<ul> <li>Show</li> <li>Show</li> <li>Show</li> </ul>	all records a look up window to select a s a look up window to select m	ingle row	'S	Use Dynamics 365 dialog for selection (filters are not applied when using this option)
Prefix  Record Created On  Regarding Object Type    Link elements  Add  Edit  Delete	ownend prefix overriddencreatedon objectidtypecode	<ul> <li>Show</li> <li>Show</li> <li>Show</li> </ul>	all records a look up window to select a s a look up window to select m	ingle row ultiple row	'S	Use Dynamics 365 dialog for selection (filters are not applied when using this option)

Figure 121: Configure Fields and Datasource-dialog



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

DocumentsCorePack Template D $$	$\times$
Type Account (account)	$\sim$
Advanced Template Settings	
Standard Additional	
Add Relationship/Entity	•
Existing Tables	
Note (table1) 🛛 🔛 🔀 🤌	
Enter your description here	
Search for a field	D
Double click the fields to insert them	
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 dropdown 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.

Create table header and/or footer?       How many columns should be created?         Table with header       Split header         Table with footer       Split footer         Insert a List separated by				nsert a new Table with a row per related record
Insert a List separated by	*	ould be created?	How many columns sh Split header Split footer	Create table header and/or footer? Table with header Table with footer
				nsert a List separated by
Delimiters Semicolons Commas Newlines Others			) Others	Delimiters Semicolons Commas Newlines

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.

Account Name *   A Datum Corporation (sample)   Phone   555-0158   Fax     Website   https://cdn-ptmedv.azureedge.net/wp-content/uplo   Parent Account     Relationship Type   Product Price List   Ticker Symbol	COUNT INFORMATION		New Section
Phone     555-0158       Fax        Website     https://cdn-ptmedv.azureedge.net/wp-content/uplo (*)       Parent Account        Relationship Type        Ticker Symbol	Account Name *	A. Datum Corporation (sample)	ACTIVITIES All (3) Quick Search V P
Website     https://cdn-ptmedv.azureedge.net/wp-content/uplo (#)       Parent Account        Relationship Type        Product Price List        Ticker Symbol	Phone Fax		System Administrator AM_Doc_b67f4ebc-e048-4eb4-a27c-56d9c50 Fr 9/
Parent Account System Administrator	Website	https://cdn-ptmedv.azureedge.net/wp-content/uplo 🕀	AM_Doc_7ee588d7-4416-4c0e-b0a9-b43cf8e <sup>™</sup> Th 8/3 ▼ OLDER
roduct Price List	arent Account elationship Type		System Administrator v 2/20/202
icker Symbol	Product Price List		
	Ticker Symbol		
	ntacts Cases	Cases active Cases I follow Connections Entitlements	

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.mscrmaddons.com tab, selecting **2** Insert MailMerge Fields to get to the **3** 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.

DocumentsCorePack Templat 🗸 🗙
Type Account (account)
Advanced Template Settings
Standard Additional
Search for a field
Double click the fields to insert them
<ul> <li>Territory Code</li> <li>Ticker Symbol</li> <li>Time Spent by me</li> <li>Time Zone Rule Version Number</li> <li>Travel Charge</li> <li>Travel Charge (Base)</li> <li>Travel Charge Type</li> <li>Travitter</li> <li>UTC Conversion Time Zone Code</li> <li>Version Number</li> <li>Website</li> <li>Work Order Instructions</li> <li>Yomi Account Name</li> <li>Billing Account (Account)</li> </ul>

*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.





File	Home Insert Dra	w Design Layout Referen	r Mailing Review Vi	iew Develot Help www.m	P
	<b>Open Template</b> Save Template Insert MailMerge Fields	Choose Send as Save as Data PDF DOCX ~	DocumentsCorePack Settings	Open LOG FolderHelpDelete LOG FilesOpen latest ~	Environments
	Templates	Get Data	Settings	Help Debug	
L .	1 - 1 - 1 - 1 - 1 <u>A</u> ei - e <b>1</b>	2 3 4 5 .	1 • 6 • 1 • 7 • 1 • 8 • 1 •	9 · i · 10 · i · 11 · i · 12 · i · 13 ·	1 · 14 · 1 · 15 · 1 · 📥
Figur	e 131: Result	REVERIO & S.			

## 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.

Timeline	+	$\mathbb{V}$	Ī≣	÷
∽ Search timeline				
Create a note				
Title				
Enter text				
$\checkmark$ Font $\cdot$ Size $\cdot$ <b>B</b> $I \cup \mathscr{Q} \cdot \land = =$	4≣	+≣		
📾 EN General Terms and Conditions.docx 🛛 🗙				
0 Add	note		Cancel	

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 con Lorem ipsum dolore magna clita kasd gul	ditions: 1 dolor sit amet, consetetur sadips a aliguyam erat, sed diam yolupti pergren, no sea takimata sanctus s	cing elitr, sed diam 1 1a. At vero eos et acc 1st Lorem ipsum dol	nonumy eirmod tempor invidunt ut la usam et justo duo dolores et ea rebur or sit amet. Lorem ipsum dolor sit am	abore et n. Stet et.
Informations	of our bank:			
BANK:	XXX	Address:	XXXXX, XXXXX	
IBAN:	XXXXXXXXXXXXXXXXXX	BIC:	XXXXXXXXXXXXXX	
It would be Yours faith	e a great pleasure to receive fully, << <u>firstname</u> >> << <u>lastr</u>	your order. 1ame>>		
Terms & C 	onditions:			

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.

File Home I	nsert Draw	Design	Layout	References	Mailings	Review	View	Develop	er Help	www.mscrm-add	lons.com		Comments	🖉 Editin	9 × 🛯	🕆 Share 🗸
Copen Template	e Fields Da	oose Send as ta PDF ~ Get Dat	Save as DOCX ~	Template Explorer Explorer	₩ Map Cha Import C Charts	nt hart D	ocuments Settir Settir	CorePack ngs	<b>?</b> Help	Open LOG Folder Delete LOG Files Open latest ~ Debug	CRM799	5 № 607 C N	lanage Connections lew Connection onments	Edit Table ~		~
	8	2 • 1 • 3 • 1 •	4 • 1 • 5 •	1 - 6 - 1 - 7 -	1 • 8 • 1 • 9 •	1 + 10 + 1 +	11 + + + 12	· i · 13 · i	14 · + • 15 ·		1					
	tid_fullnam Thanks for CREATED/ Product Nam < <u>productde</u>	e>>, the interess ATE \@"N ne scription Discount:	t in our p A/d/yyyy (< <discou< td=""><td>oroducts. Reg " \* MERGI</td><td>Quantity «quanti «quanti</td><td>tr reques }, we car y   ty&gt;&gt; ; Sub-' ldiscount</td><td>st per e-n a offer yc Price per Unit «pricepe it»» { if "&lt;<diso Total: ~ amount&gt;:</diso </td><td>nail from ou the fol run &lt;</td><td>{ lowing: nount extendeda un entage&gt;&gt;"&gt; sitemamou btaltax&gt;"&gt; &lt;<totaltax< td=""><td><u>mo</u> t≥≥ n0r = n0r = &gt;≥°}}</td><td>Di Typ Sta</td><td>e Quo indard Ac Existing Ta Account (ta Enter your o</td><td>Advanced Templa Advanced Templa Add Relationship bles able7) description here</td><td>: Temp ate Settings a/Entity</td><td>lat</td><td>× ×</td></totaltax<></td></discou<>	oroducts. Reg " \* MERGI	Quantity «quanti «quanti	tr reques }, we car y   ty>> ; Sub-' ldiscount	st per e-n a offer yc Price per Unit «pricepe it»» { if "< <diso Total: ~ amount&gt;:</diso 	nail from ou the fol run <	{ lowing: nount extendeda un entage>>"> sitemamou btaltax>"> < <totaltax< td=""><td><u>mo</u> t≥≥ n0r = n0r = &gt;≥°}}</td><td>Di Typ Sta</td><td>e Quo indard Ac Existing Ta Account (ta Enter your o</td><td>Advanced Templa Advanced Templa Add Relationship bles able7) description here</td><td>: Temp ate Settings a/Entity</td><td>lat</td><td>× ×</td></totaltax<>	<u>mo</u> t≥≥ n0r = n0r = >≥°}}	Di Typ Sta	e Quo indard Ac Existing Ta Account (ta Enter your o	Advanced Templa Advanced Templa Add Relationship bles able7) description here	: Temp ate Settings a/Entity	lat	× ×
							Tota	ul: < <to< td=""><td>otalamou</td><td>ut&gt;&gt;</td><td></td><td></td><td></td><td></td><td></td><td></td></to<>	otalamou	ut>>						
	This quote i	is valid for	XX days	from today.							24	earch for a f				2
	Payment cond Lorem ipsum dolore magna clita kasd gub Informations BANK: IBAN:	litions: dolor sit ang aliquyam er ergnen, no se of our bank: XXX XXXXXX	et, consetteti at, sed diar a takimata XXXXXXX	ut sadipscing el n <u>voluptua</u> . At sanctus est Lor X	litt, sed diam; veto eos et ac em ipsum dol Address: BIC:	nonumy ei cusam et ji lor <u>sit ame</u> XXXX XXXX	irmod tem 1sto duo d t. Lorem ip (X, XXXXX (XXXXXX)	por invidu olores <sup>et</sup> es osum dolor ( (	nt ut labore rebum. Ste sit amet.	et t		Quote Note				
	It would be	a great pl	easure to	receive you	order.											
	Yours faith	fully, < <fir< td=""><td>stname&gt;&gt;</td><td>&lt;<li>&lt;<lastname< li=""></lastname<></li></td><td>»</td><td></td><td></td><td></td><td></td><td>]</td><td></td><td></td><td></td><td></td><td></td><td></td></fir<>	stname>>	< <li>&lt;<lastname< li=""></lastname<></li>	»					]						
1	Terms & Co	onditions:										Insert ' Insert ' Insert ' Insert '	Note' as Picture Field Note' as Picture-Link- Note' as Document Note' as HTML Note' as Inspection	Field		ŵ
age1of1 🗊	German (Austria	) Text Pred	lictions: On	50							j:	Insert 9	Static Item	,		+ 100%
				-								Insert ( Insert I Insert )	Computed Item DocuSign Item AssureSign Item AdobeSign Item	, , ,		

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.



Ins	ert a new Table with a row per related record		
	Create table header and/or footer? Table with header Table with footer	How many columns s Split header	hould be created?
Ins	ert a List separated by		
	Delimiters		
	Semicolons      Commas      Newlines	<ul> <li>Others</li> </ul>	

Figure 136: Insert Document as table

#### **Step 6**: Successfully inserted pattern (highlighted).

clita kasd gi	ibergren, no sea takimata sanctus	est Lorem ipsum dol	or <u>sit amet</u> . Lorem ipsum dolor sit <u>amet</u> .
Information	15 of our bank:		20000/ 20000/
BANK:		Address:	
Yours fait	hfully, << <u>firstname</u> >> << <u>last</u>	name>>	
Torma la (	Conditions:		

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.

clita kasd g	ubergren, no sea takimata sanctus	est Lorem ipsum do	lor <u>sit amet</u> . Lorem ipsum dolor sit <u>amet</u> .
Informatio	ns of our bank:		
BANK: IBAN:	XXX XXXXXXXXXXXXXXXXXX	Address: BIC:	XXXXXX, XXXXXX XXXXXXXXXXXXX
It would	be a great pleasure to receive	e your order.	
V 6-	thfully System Administrate	Dr	
Terms & G Svs	Conditions: eneral Terms and teme GmbH for	nd Condi <sup>.</sup> the Sale	tions of PTM EDV- of Licenses and the
Terms & G Sys	Conditions: eneral Terms and teme GmbH for Conclusion of	nd Condi the Sale Subscrip	tions of PTM EDV- of Licenses and the ption Contracts
Terms & G( Sys 1.	<sup>Conditions:</sup> eneral Terms and teme GmbH for Conclusion of General	nd Condi the Sale Subscrip	tions of PTM EDV- of Licenses and the ption Contracts

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 <u>rich text editor</u>. 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 3<sup>rd</sup> party providers, Microsoft provides Out-of-the-Box capabilities to enter HTML via the **rich text** control as described <u>here</u>.

#### 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 <u>Power Apps</u>.
- 2 Navigate on the left to **Tables**.
- 3 Select the table you want to open.
- Click on the three dots and open the table (in this example it is Account).

III Power Apps 1	₽ Sear	ch				
=	+ New table $\lor$ I Open $ $ $\lor$ $\not O$ Edit $ $ $\lor$ $\leftrightarrow$ Import $\lor$ $\downarrow$	→ Export ∨ 🛞 Properties 🗔 Publish 👔	Advanced $\sim$	Delete		
යි Home						
+ Create	Tables					
🛄 Learn	Recommended Custom All					
⊕ Apps						
Tables 2	IE Table † ~	Name 🗸	Туре 🗸	Managed 🗸	Customizable 🗸	Tags 🗸
e/ <sup>a</sup> Flows	Quote	quote	Standard	Yes	Yes	Sales
Solutions	Quote Booking Incident	4 💷 Open   > :d	Standard	Yes	Yes	Standard
··· More	Quote Booking Product		Standard	Yes	Yes	Standard
	Quote Booking Service	← Import >	Standard	Yes	Yes	Standard
Power Platform	Quote Booking Service Task	Properties	Standard	Yes	Yes	Standard
	Quote Booking Setup	Publish tup	Standard	Yes	Yes	Standard
	Quote Close	17 Advanced >	Activity	Yes	Yes	Standard
	Quote Invoicing Product	Delete	Standard	Yes	Yes	Standard
	Quote Invoicing Setup	msdyn_quoteinvoicingsetup	Standard	Yes	Yes	Standard

Figure 140: Insert the HTML editor content into a quote



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

III Power Apps		D Search			æ <sup>Envin</sup>	norment D @ ?	
=	+ New 🗸 🖉 Edit   🗸 🖽 Create an app 🕑 U	sing this table $\ \leftrightarrow$ Import $\ \lor$ Export $\ \lor$	🖁 Advanced 🗸 🗐 Delete	b.			
<ul> <li>G Home</li> <li>+ Create</li> </ul>	Tables > Quote						
🛄 Learn	Table properties	G	👌 Properties 💼 Tools 🗸	Schema 🛈	Data experiences ①	Customizations ①	
P Apps Tables p <sup>o</sup> Flows Solutions	Name Primary column Quote Name Type Last modified Standard 7 minutes ago	Description Formal offer for products and/or see specific prices and related payment to prospective customer.	ices, proposed at erms, which is sent to a	© Columns 1 °Ç Relationships Q <sub>a</sub> Keys	Forms Views Let Charts Dashboards	ã₀ Business rules ⊞ Commands Ģ Messages	
	Quote columns and data		₩ Update forms and views				
e Power Platform	Im Name* ↑ ~	📰 Status* 🗸 🖓 Total amount 🗸	EE Potential Customer* ∽	ld III Created On ∨	⊿ 🖽 Profitability ~ ⊿ 0.0 Adj	justed Gr 🕫 🗄 + 120 more 🗸 🕂	
	April Fools offer	Closed 0.00	A Datum Fabrication	3/22/2023 10:14 AM	Not Profitable 0.00		
	Best offer offer	Closed 0.00	A. Datum Corporation (sam)	ple) 3/22/2023 10:15 AM	Not Profitable 0.00		
	Best offer offer	Active 6,920.00	A. Datum Corporation (sam)	ole) 3/22/2023 11:30 AM	Profitable 100.0	0	
	Forget Winter Offer	Closed 0.00	Adventure Works (sample)	3/22/2023 10:16 AM	Not Profitable 0.00		
	Taura Winner Offer	Anti-	A dimensional Manufacture (annual a)	2/22/2022 40/20 414	Durfacture 100.0	ant and a second se	

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**.

	Power Apps   Form	₽ Sea	arch			Environment CRM864092	0 @ ? SA
*	- Back 🦻 🦿 🗶 🛍 🔤 De	lete 🖾 Form field 🔡 Component 🗔 Form libra	aries 🗧 Business rules 📑 Form	settings ····		Ę	Save a copy 👸 Save and publish 🗸
	Table columns     X       P Search     V ~       + New table column	New Quote Quote Summary Details Related ∽			mount Effective from Effective to	n Progress 🗸	DESCRIPTION         >           Multime text         Properties         Events         Business rules           ^ Display options
~	Show only unused table columns	A Current IN	anopuere.		SALES INFORMATION	í.	Table column Description
20 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	O. Account Manager         0           Account Manager         0           Bill So City         0           Bill To Control Name         0           Bill To Country/Region         0           Bill To Country/Region         0           Bill To State         0           Bill To State         0           Bill To Name         0           Bill To Street 1         0	C Guete ID*  A Revision ID*  Owner* A System Administrator Name*  Currency*	PRODUCTS Group By: (no group V   Product Name V   P	ing] ♥ Inger_ ♥ Unit ♥ Price Per_ ♥ Quantity p No data available. K ← Page1 →	Opportunity  Potential Customer*  DESCRIPTION  Add compon	nent	Description ()  Etit table column Label *  DESCRIPTION  Hide label Hide on phone () Hide () Lock () Read-only
	Bill To Street 2 Bill To Street 3 Bill To 2P/Postal Code Code Code Code Code Code Code Code	US Dollar  Price List* SHIPPING INFORMATION	Detail Amount     (-) Discount (%)     (-) Discount		Search 3 A Rich Text Edit El Business card A Canvas app d <sup>6</sup> Pen input	or Control reader	<ul> <li>&gt; Formatting</li> <li>Form field width         <ul> <li>1 column</li> <li>&gt;</li> </ul> </li> <li>Form field height         <ul> <li>8 rows</li> <li></li></ul></li></ul>
	, Created By , Created By (Delegate) 평 Created On 錢 Customer Budget	Shipping Method  Payment Terms	은 Pre-Freight Amount (+) Freight Amount 은 (+) Total Tax		g- ren input		Components

Figure 142: Add Rich Text Editor Control



#### Step 4: Confirm with Done.

<ul> <li>← Add Rich Text Editor</li> <li>Control</li> <li>Field ①</li> <li>Table column *</li> </ul>
Description
Custom configuration URL ①
Static value
Show component on
✓ Web
✓ Mobile
✓ Tablet
Done Cancel

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.

=	← 🗄 3 🖬 Save 🛱 Save & Close + 1	lew 🗊 Delete 🚺 Create Document 🖒 Refresh 🔍 Check Access 📾 E	xport to PDF 🛛 RE Look Up Address 🕒 Activate Quot	te 🕲 Get Products 🗄 Process 🗸 🗛 Assign 🗄
💮 Home	Maria Campbell - Saved			\$0.00 In Progress
🕒 Recent 🗸 🗸	Quote $\cdot$ Quote $\vee$			Total Amount Effective From Effective To Status
🖈 Pinned 🗸 🗸	Summary Details Related			
Home     Necent     Necent     Nov     Prined     Nov     Nov     Secent     Nov     Secent     Dashboards     Dashboards     Dashboards     Activities     Customers     Activities     Accounts     Accounts     Sales     Leads     Opportunities     Competitors     Competitors	A create 101			
Sales accelerator		PRODUCTS	+ Add Product O Refresh :	SALES INFORMATION
₩ Dashboards		Group By: (no grouping) ~		Opportunity
Activities	0	$\begin{array}{c c c c c c } \bullet & \bullet $	Discount ∨ Extended Am ∨	Potential Customer 🔹 🔁 Fabrikam, Inc. (sample)
Customers	Owner*			
Accounts	System Administrator	No data available.	2	
Q Contacts	Name*			DESCRIPTION
A contacto	Maria Campbell		$\leftarrow$ $\leftarrow$ Page 1 $\rightarrow$	standars com
Sales	Currency*	K ← Poge 1 →	Your company for MS-CRM ADD-ONS!	
& Leads	🛞 US Dollar			•••
Opportunities	Price List*	A Detail Amount \$0.00		Part of the Part o
R Competitors	🔓 mscrm-addons	(-) Discount (%)		Product         List Price           Sport Shoes Ladies         € 548           Sport Shoes Men         € 99
1 teral		(-) Discount		
🖹 Quotes	SHIPPING INFORMATION	A Pre-Freight Amount 60.00		
Crders	Shipping Method	a renegative acco		
B Invoices		(+) Freight Amount		
Products	Payment Terms	≙ (+) Total Tax \$0.00		
Sales Literature				

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.



n Template t Template t MailMerge Fields t	ws and Columns ~ 🖾 Field properties Grouping ~ 😨 Table properties Delete Field Edit Table
	DocumentsCorePack Template De *
	Advanced Template Settings
	Standard Additional
constructed account account	Search for a field.
Tex securitomenial account namess	
secustomerid account primarycontactid fullnamess	Depresented Stage Id
<ccustomerid_account_address1_line1>&gt;,<ccustomerid_account_address1_city>&gt;&lt;<customerid_account_address1_city>&gt;&lt;<customerid_account_address1_city>&gt;&lt;<customerid_account_address1_postalcode>&gt; Dear &lt;&lt;<u>customerid_account_primarycontactid_fullname&gt;&gt;</u>, Thanks for the interest in our products. Regarding your request per e-mail from 5/30/2011, we can offer you the following:</customerid_account_address1_postalcode></customerid_account_address1_city></customerid_account_address1_city></ccustomerid_account_address1_city></ccustomerid_account_address1_line1>	
This quote is valid for XX days from today.	Closed On Competitive
Payment conditions: Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy, eirmod tempor invidunt ut labore et dolore magna alguyam ergt, sed diam voluptua. At vero eos et accusam et lasto duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor git amet. Lorem ipsum dolor sit amet. Informations of our bank: RANK VV addreser VVVV	Contact     Created On     Customer Budget     Customer Budget (Bsse)     Customer Budget (Bsse)     Customer Budget (Isst Updated On)     Customer Budget (Isste)     Description
IBAN: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Due By
It would be a great pleasure to receive your order.	Insert 'Description' as Picture Field Insert 'Description' as Picture-Link-Field
Yours faithfully, «cfirstname»» «clastname»»	3 Insert 'Description' as Document
A STATE & MARKAGE AND A STATE	Insert 'Description' as HTML
	Insert Static Item
	Insert Computed Item
	Insert Docusign item >
	Insert Assuresion item

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 ( $\in$ ) in the figure below) are not displayed properly, it may be due to the encoding.



raunkant, mc. (Sang	ple)
To: Maria Campbel	l (sample)
7995 Edwards Ave.L	ynnwood58299
Dear Maria Campbel	ll (sample),
Thanks for the intere can offer you the foll	est in our products. Regarding your request per e-mail from 2/8/2022, wo
<b>*</b> mscrr	m- <b>addons</b> .com
	m-addons.com pany for MS-CRM ADD-ONSI
Your comp	m-addons.com pany for MS-CRM ADD-ONSI
Your comp	m-addons.com pany for MS-CRM ADD-ONSI
Product	n-addons.com pany for MS-CRM ADD-ONSI
Product	Dany for MS-CRM ADD-ONSI
Product Sport Shoes Ladies	Deny for MS-CRM ADD-ONSI

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**.



	10000	r bek settings			X Delete Field				
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				Namo	description				
				Relation:	document				
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	< <customeri< td=""><td>id_account_addr</td><td>ess1_line1</td><td>HTML</td><td>Typ 4</td><td>Downlo</td><td>ad SharePoint in</td><td>nages an</td><td>d embed</td></customeri<>	id_account_addr	ess1_line1	HTML	Typ 4	Downlo	ad SharePoint in	nages an	d embed
	rid_account	_address1_posta	lcode>>	Try to do	wnload blob content	Encoding:	UTF-8		
				and emb	ed as Base64	Source	field is of type Fi	le	
	Dear const	amerid account	nrimaruco						
	Thanks for t	he interest in our	products.				OK		Cancel
	we can offer	you the followir	ng:						
l	description <- <description< th=""><th>&gt;&gt;</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></description<>	>>							
	This quote is	s valid for XX da	ys from too	day.					
	Payment condi Lorem ipsum d dolore magna ( clita kasd gube	itions: lolor sit amet, conset aliquyam erat, sed di rgren, no sea takima af our bank:	etur sadipsci am <u>voluptu</u> a ta sanctus es	ng elitr, sed di At <u>vero eos</u> e Lorem ipsum	am n <u>onumy</u> eirmod t a <u>ccusam et justo</u> du dolor <u>sit amet</u> . Loren	empor invid o <u>dolores</u> et e n ipsum dolo	unt ut labore et ea rebum, Stet or sit amet.		
	BANK:	XXX		Address:	XXXXXX, XXX	xx			
	IBAN:	x000000000000	XX	BIC:	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	O(X			
	It would be	a great pleasure	to receive y	your order.					
	Yours faith	fully, << <u>firstnam</u>	e>> < <lastr< td=""><td>name&gt;&gt;</td><td>******</td><td></td><td></td><td></td><td></td></lastr<>	name>>	******				
	L							1	

#### 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



Insert 'Account Name' as Picture Field Insert 'Account Name' as Picture-Link-Field		60%
Insert 'Account Name' as Document		
Insert 'Account Name' as HTML		
Insert 'Account Name' as Inspection		
Insert Static Item	+	Static Document
Insert Computed Item	•	Page Break
Insert DocuSign Item		Remove Empty Lines
Insert AssureSign Item	$\rightarrow$	Join Tables
Incert AdobeSign Item		

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).



Static Document			×
Static Documen	t properties		?
Change or set the Static D	Ocument		
Search for a field			Q
Select the fields that shou	ld be used in	n your Pa	ttern
Primary Contact (Conta (Deprecated) Process Contact Entity Image Id Process Company Name (Acc Company Name (Contact Company Name (Contact)	ct) ; Stage count) ntact)		~
Your Pattern for this prop	perty		
primarycontactid_contactid	2		
Provide the selected field	l as a paramet	er	
Select	Document		
Formatting options Supress additional Line Keep formatting of sou	e breaks urce documer	nt	
(	ж	Can	cel

Figure 150: Provide a parameter



### 2. Hit the "Select Document" button

Static Document		_		$\times$
Static D	ocument prop	erties		2
Change or set the	e Static Docum	ent		
Search for a field				Q
Select the fields t	hat should be	used in	your Pa	ttern
Primary Conta	ct (Contact)			^
(Deprecated	d) Process Stage			
Contact				
- Entity Imag	e ld			
Process				
🖶 Company N	lame (Account)			
🗄 Company N	lame (Contact)			
Croated By	(Dologato) (Llear	4	_	. *
<b>`</b>				/
Your Pattern for	this property			
primarycontactid_o	contactid			
Provide the sele	cted field as a n	aramete	r	
	ered held us u p	aronnece		
	Select Docum	nent		
Formatting opti	ions			
Supress addit	tional <mark>L</mark> ine break	s		
Keep formatt	ing of source do	cument		
3	ОК		Cano	el:

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.



Look Up Record	s—s		$\times$
Look Up Record			
inter your search criteria			
Name: Search for records			Q
Name	Created On		^
AccountReconnectdocx	12/15/2022 7:54 AM		
Account_Overview.docx	12/15/2022 7:54 AM		
Account_QR_Template.docx	12/15/2022 7:54 AM		
Activity_Overview.docx	12/15/2022 7:55 AM		
Appointment Overview.docx	12/15/2022 7:55 AM		
Case Overview.docx	12/15/2022 7:55 AM		
Contact Reconnect - Gift Certificate.docx	12/15/2022 7:55 AM		
Contemporary Letter.docx	12/15/2022 7:54 AM		
Contract.docx	12/15/2022 7:54 AM		r
EOfficeSupplies.docx	1/16/2023 2:08 PM		
InsertStaticDocument.docx	2/8/2023 7:28 AM		
Invoice_Base.docx	12/15/2022 7:55 AM		
InvoiceWithGrouping_Base.docx	12/15/2022 7:55 AM		
Lead Overview.docx	12/15/2022 7:55 AM		
List of Accounts related to this Account.docx	12/15/2022 7:54 AM		
List of Accounts related to this Contact.docx	12/15/2022 7:55 AM		~
Max. Results: 250 Sho	ow all records	Record	s: 29
	ок	Cancel	

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**.



Static Document	1 <del></del> 1/		$\times$
Static Document	properties		?
Change or set the Static Do	ocument		
Search for a field			Q
Select the fields that should	d be used in	your Pa	ttern
Primary Contact (Contact	t)		^
(Deprecated) Process	Stage		
- Contact			
- Entity Image Id			
- Process			
🕀 Company Name (Acco	ount)		
E-Company Name (Cont	tact)		
Crosted By (Delegate)	(llear)	_	~
<			>
Your Pattern for this prop	erty		
primarycontactid_contactid			
Provide the selected field and a selected field	as a paramet	er	
Select D	Document		
Contact Reconnect - Gift Cer	tificate.docx	(1)	
Formatting options			
Supress additional Line	breaks		
Keep formatting of sour	rce documen	t	
2 0	к	Can	cel

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**.

Doo	cumentsCorePack	Te	emj	olate Desig	1 ×
Туре	Account (account)				~
10	Advanced 1	Tem	plate	Settings	
Stand	lard Additional				
Sear	rch for a field				Q
Dou	ble click the fields to insert the	m			
	(Deprecated) Process Stage (Deprecated) Traversed Path Account Account Name Account Number Account Rating Address 1 Address 1: Address Type				~
	Address 1: City				
	Address in country/region				· · ·
	Insert Field	-			(Ö)
	Insert as Picture Field				+ 100%
	Insert as Picture-Link-Field				
	Insert as Document				
	Insert as Inspection				
2	Insert Static Item			Statia Da avera ant	
-	Insert Computed Item		3	Page Break	
	Insert DocuSian Item	,	-	Page Dreak	
	Insert AssureSign Item			loin Tables	
	Insert AdobeSign Item	÷		Join Tables	



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



Name	Mobile	Email	
< <firstname>&gt; &lt;<lastname>&gt;</lastname></firstname>	< <mobilephone>&gt;</mobilephone>	< <en< th=""><th>nailaddress1&gt;&gt;</th></en<>	nailaddress1>>
< <pre>&lt;<pre>pagebreak&gt;&gt;</pre></pre>			
2. Opportunities			
Topic	Created	on	Totalamount
< <name>&gt;</name>	< <create< td=""><td>don&gt;&gt;</td><td><ctotalamount>&gt;</ctotalamount></td></create<>	don>>	<ctotalamount>&gt;</ctotalamount>
3. Quotes Name	Created	on	Totalamount
3. Quotes Name < <quotenumber>&gt; &lt;<name>&gt;</name></quotenumber>	Created	on don>>	Totalamount < <totalamount></totalamount>
3. Quotes Name < <quotenumber>&gt; &lt;<name>&gt; 4. Orders</name></quotenumber>	Created << <u>created</u>	on don>>	Totalamount
3. Quotes Name < <quotenumber>&gt; &lt;<name>&gt; 4. Orders Name &lt;<p>Name</p></name></quotenumber>	Created << <u>created</u> Created	on don>> on	Totalamount Totalamount

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

1.→Contacts¶			
Name¤	Mobile¤	Email¤	
чд Dana Baash	H I	Ħ	





# 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.

company	< <name>&gt;9</name>					Company-	Adventure	-Works-(sar	nple)¶	
Name:=	п					Name:#	H			
Primary Contact=	<pre><core contactid="" fullname="">&gt;= contactid fullname&gt;&gt;= contactid fullname&gt;= contactid</core></pre>					Primary-Contact=	Nancy And	erson (sampl	e)=	
Auros	<address1_mer>&gt;1 &lt;<address1_postalcode>&gt;-&lt;<address1 n</address1 </address1_postalcode></address1_mer>	ess1_city>><	<address1_county>&gt;¶</address1_county>			Autosa	95486-Santa ¶ ц	Cruz~¶		
Contents¶						Contents¶				
1. → Contacts		+		19		1. → Contacts			7	
	iae			107		2 -> Opportuniti			-	
2. • Opportunit	AE9					2. · Opportunut				
3. → Quotes		t		14		3. → Quotes		******		
4. → Orders				19		4. → Orders			<del></del>	
$5. \rightarrow$ Invoices		*		1¶		<ol> <li>→ Invoices</li> </ol>			<del>1</del>	
6. → Cases				1¶		6. → Cases				
t i						9				
						-				
1						1				
1.→Contacts	I					<ul> <li>1.→Contacts¶</li> </ul>	I			
1.→Contacts	Mobilen	Ema	il¤	H		1.→Contacts¶     Namer	I	Mobilen	En	nailm
1.→Contacts Namen ≪firstname>> <d< td=""><td>Mobile# astname&gt;&gt;# &lt;<mobilephone>&gt;#</mobilephone></td><td>Ema</td><td>il¤ mailaddress1&gt;&gt;¤</td><td>a a</td><td></td><td>• 1.→Contacts¶ Namer Nancy Anderson (</td><td>I sample)¤</td><td>Mobile#</td><td>En</td><td>nail¤ omeone_c©example.com</td></d<>	Mobile# astname>># < <mobilephone>&gt;#</mobilephone>	Ema	il¤ mailaddress1>>¤	a a		• 1.→Contacts¶ Namer Nancy Anderson (	I sample)¤	Mobile#	En	nail¤ omeone_c©example.com
1.→Contacts Names ≪ <u>firstname</u> >>> <d< td=""><td>Mobiles astname&gt;&gt;# &lt;<mobilephone>&gt;#</mobilephone></td><td>Ema</td><td>il¤ mailaddress1&gt;&gt;¤</td><td>a a</td><td></td><td>1.→Contacts     Name:     Nancy-Anderson(     2.⇒Opportuge</td><td>sample)=</td><td>Mobileн н</td><td>Er</td><td>nail¤ omeone_c©example.com</td></d<>	Mobiles astname>># < <mobilephone>&gt;#</mobilephone>	Ema	il¤ mailaddress1>>¤	a a		1.→Contacts     Name:     Nancy-Anderson(     2.⇒Opportuge	sample)=	Mobileн н	Er	nail¤ omeone_c©example.com
1.→Contacts Names ≪firstname>> <d< td=""><td>Mobilen astname&gt;&gt;== &lt;<mobilephone>&gt;==</mobilephone></td><td>Ema</td><td>il¤ mailaddress1&gt;&gt;¤</td><td>a a</td><td></td><td>IContacts     Namer     Nancy-Anderson(     2Opportun     Topic</td><td>sample)# nities¶</td><td>Mobilen H</td><td>En s</td><td>nail# omeone_c@example.com</td></d<>	Mobilen astname>>== < <mobilephone>&gt;==</mobilephone>	Ema	il¤ mailaddress1>>¤	a a		IContacts     Namer     Nancy-Anderson(     2Opportun     Topic	sample)# nities¶	Mobilen H	En s	nail# omeone_c@example.com
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1>Contacts' Name: <firstname>&gt;&gt;<d< td=""><td>Mobiles ashameou <mobilephoneous moviles</mobilephoneous </td><td>Ema</td><td>il¤ mualladdress1≫≋</td><td>a a</td><td>L</td><td><ul> <li>1&gt;Contacts¶ Namer Nancy-Anderson (</li> <li>2&gt;Opportun Topics Some interest invoi (sample)s:</li> <li>3&gt;Ountes¶</li> </ul></td><td>∏ sample)¤ nities¶ ur]J-line-of-j</td><td>Mobile# # products</td><td>Created-on:: 2/2/2022#</td><td>nails: meone_c@example.com Totalamounts: \$0.00s</td></d<></firstname>	Mobiles ashameou <mobilephoneous moviles</mobilephoneous 	Ema	il¤ mualladdress1≫≋	a a	L	<ul> <li>1&gt;Contacts¶ Namer Nancy-Anderson (</li> <li>2&gt;Opportun Topics Some interest invoi (sample)s:</li> <li>3&gt;Ountes¶</li> </ul>	∏ sample)¤ nities¶ ur]J-line-of-j	Mobile# # products	Created-on:: 2/2/2022#	nails: meone_c@example.com Totalamounts: \$0.00s
1+Contacts Name: Cfirstname>>>d	I Mobiles astnamesou comobilephonesou MESOT	Ema	ilπ mailaddress1≫π	H H H		1.→Contacts¶ Names Nancy-Anderson(     2.→Opportum Topic: Some interest-invo (sample)=      ¶     3.→Quotes¶ Names	¶ sample)≈ nities¶ urJJ-line-of-j	Mobile# #	Created-on: 2/2/2022#	Totalamount:
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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**.



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Figure 160: Remove Empty Lines option



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Figure 161: Insert "Remove Empty Lines"

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

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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 **1** mscrm-addons tab. With the **2** Insert MailMerge Fields you open the **3** DocumentsCorePack Template Designer task pane. Now click on the **4** Insert Field button.



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

**Step 2**: The **Insert Field** button opens a selection of possibilities. Learn <u>here</u> 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.

< <quotenumber>&gt;</quotenumber>		
jointables>>		
Product Name	Price	

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 <u>syntax</u> '\n'. If you need to display multiple lines, use the '+' sign to concatenate them.



QR Code		<u>810</u>		×
回光回 Mark QR Code	e properties			2
Change or set the	QR Code			
Search for a field				Q
Select the fields th	at should be us	sed in your F	Pattern	
Version Numb Website Vork Order In Yomi Account Created By (Dr Created By (Dr Created By (Dr Created By (Dr Vour Pattern for th	nstructions Name nt (Account) elegate) (User) ternal Party) ser) <b>is property</b>			~
< <websiteurl>&gt;</websiteurl>	1			< >
QR Code Option	s			
QR Code Level	5 2	Foregrou	nd Color	5
Error Correction	L (7%) (3	Backgrou	nd Color	6
Max Length	106	Transpare	ent BG	27
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Figure 169: Define Link pattern for QR code and QR Code options

### **QR Code options:**

**2 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.

**3** 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



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

**5** 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.

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

**7 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, <u>here</u> 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  $\bigcirc$  based on a placeholder in a template  $\bigcirc$ .



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Figure 171: Example of dynamic string

## Use the Advanced String option.

Insert 'Account Name' as Picture Field		(Q)
Insert 'Account Name' as Picture-Link-Field	8 –	
Insert 'Account Name' as Document		
Insert 'Account Name' as HTML		QR Code
Insert 'Account Name' as Inspection	(1	Advanced String
Insert Static Item		Calculated field
Insert Computed Item	•	Hyperlink
Insert DocuSign Item	•	Condition field
Insert AssureSign Item	•	Prompt Field
Insert AdobeSign Item	•	DateTime Field

Figure 172: Insert Advanced String



Create your Advanced String by defining your **1** link pattern. The <u>Syntax</u> is described here.

0.0000 CONTRACTOR CONTRACTOR	<u> </u>		×
Advanced String p	properties		?
Change or set the Advanced	1 String		
- (Deprecated) Traversed F	Path		
Account			
Account Name			
- Account Number			
- Account Rating			
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Address 1: Address Type			
Address 1: City			
Address 1: Country/Regi	on		
Address 1: County			~
Address 1. Pax			>
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Your Pattern for this property	-		
Your Pattern for this property < <accountnumber>&gt;</accountnumber>	-		^
Vour Pattern for this property < <accountnumber>&gt;</accountnumber>			^
Your Pattern for this property <-accountnumber>>			^
Your Pattern for this property < <accountnumber>&gt;</accountnumber>			~ ~ ~
Your Pattern for this property < accountnumber>> 1 Placeholder Text (optional):	Advanced Str	ing	~
Your Pattern for this property < accountnumber>> 1 Placeholder Text (optional): Formatting options	Advanced Str	ing	×
Your Pattern for this property < accountnumber>> 1 Placeholder Text (optional): Formatting options Delete line/row if whole lin	Advanced Str e/row is empty	ing	~
Your Pattern for this property < accountnumber>> 1 Placeholder Text (optional): Formatting options Delete line/row if whole lin Delete line/row if this field	Advanced Str e/row is empty is empty	ing	~

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.



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Advanced String	properties				?
Change or set the Advance	d String				
(Deprecated) Traversed	Path				TH .
Account					
- Account Name					
- Account Number					
Account Rating					
Address 1					
Address 1: Address Typ	e				
- Address 1: City					
Address 1: Country/Reg	lion				
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Address 1: Fax Your Pattern for this proper 'Number_' + k < account num	ty nber>>			>	< >
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Address 1: Fax our Pattern for this proper 'Number_' + k < accountnum acceholder Text (optional): Formatting options Delete line/row if whole li Delete line/row if this field	ty nber>> Advanced ne/row is emp d is empty	Strin	g	>	) )

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**.



File Home Insert D	oraw Design Layout	References	Mailings Revi	iew View Deve	loper I	Help www.mscrm	-addons.com	1 🖓 Comments	🖉 Editing 🖌 🕜
Gpen Template	Choose Create Save as Data Activity DOCX ~	Template Explorer	🏥 Map Chart 🕀 Import Chart	Documents Core Pack Settings	? Help	Open LOG Folder Delete LOG Files Open latest ~	CRM519477	Manage Connections New Connection	
Templates	Get Data	Explorer	Charts	Settings	Help	Debug		Environments	

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.



Detail amount: <<totallineitemamount>>

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Computed rield properties						
Change or set the Computed Field						
Search for a field						
Select the fields that should be used in your Pattern						
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Example:	123.456,89					
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Figure 177: Insert a formula for a Computed field

Result:

Detail amount: €13,260 Discount: €1,000 Total amount: €12,260 Discount: 7,54%

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:



Detail amount: €13,260 Discount: €1,000	Computed Field — 🗆	× ?
Total amount: €12,260 Discount: -91,46%	Change or set the Computed Field	
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	Select the fields that should be used in your Patte	ern
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		~
	Placeholder Text (optional): Computed Field	
	Formatting options	
	Example: 123.456,89	
	Format: N2	~
	Culture:	~
	OK Cano	el

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.



Insert as Picture Field Insert as Picture-Link-Field Insert as Document		
Insert as HTML Insert as Inspection		QR Code Advanced String
Insert Static Item	•	Hyperlink
Insert DocuSign Item	)	Condition field
Insert AssureSign Item	•	Prompt Field
Insert AdobeSign Item		DateTime Field

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.



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ink (Url) Displayname			
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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.



Hyperlink	_		×
Hyperlink properties			?
Change or set the Hyperlink			
Link (Url) Displayname			
Search for a field			Q
Select the fields that should be u	sed in	your Patt	ern
<ul> <li>(Deprecated) Process Stage</li> <li>(Deprecated) Traversed Path</li> <li>Account</li> <li>Account Name</li> <li>Account Number</li> <li>Account Rating</li> <li>Address 1</li> <li>Address 1: Address Type</li> <li>Address 1: City</li> </ul>			~ ~ ~
Your Pattern for this property			
'Search in google: '+< <name>&gt;</name>			^
			~
Placeholder Text (optional): Hype	rlink		
Formatting options			
Show when one of the used field	ds is en	npty	
Delete Row/Line if hyperlink is e	empty		
ОК		Cano	:el

Figure 182: Define your Hyperlink in the Displayname tab

Step 4: There are Additional Options [optional]

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



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Change or	set the H	yperlink			
Link (Url)	Displayn	ame			
Search fo	or a field				Q
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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.



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Figure 184: Result

## 6.23.1 How to modify the Hyperlink style

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

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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 <u>conditions</u> 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.



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igure 186:	Quote tem	plate								

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:

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



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

3 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.

Condition Field	-		×
Condition Field propertie	s		?
Condition Field			
Condition Name/Description:	Gender		
	54 chars left		
Relation:	document	j	
Conditional block (if statement)			
Create else block	next to each other     One below the other		
Conditional Formatting			
Format - Style	✓ New		
Format - Apply to	✓ ☐ Force full style update		
Use existing condition	Copy & New		
Negate condition			
Designer	3		
편 Group AND 현 Group OR	× Delete		
	~		
Potential Customer (Contact)	~		
Gender	✓ equals ✓ Male		
	~		
	(4)		
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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
< <cu< th=""><th>stomerid_account_primarycontactid_fullname&gt;&gt;,</th></cu<>	stomerid_account_primarycontactid_fullname>>,
aure 189	9: 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**".



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).



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.

Condition Field	ies		_		× ?
 Condition Field					
Condition Name/Description:	Short Description as part	of the Name		14	
	60 chars left				
Relation:	document				
Conditional block (if statement)					
Create else block	next to each other	O one below the other			
O Conditional Formatting					
Format - Style		✓ New			
Format - Apply to		Force full style update			
existing condition			Copy & New		
Negate condition	- 11		1.14		_
Designer					
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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.



<ul> <li>Select Values</li> <li>Select Values</li> <li>Select the values you was</li> </ul>	ant included.	-	
Available Values		Selected Values	
Male Diverse	>>	Female	
		ок	Cancel

Figure 196: Selection dialog for picklist elements

## **Step 4:** Examples of other data types.

Created On	~	equals	~	01/06/	2023 (	00:00		•			
	~					Ju	une 202	!3		•	
				Mon 29 5 12 19 26 3	Tue 30 6 13 20 27 4	Wed 31 7 14 21 28 5	Thu 8 15 22 29 6 Today: (	Fri 2 9 16 23 30 7 01/06	Sat 3 10 17 24 1 8 /2023	Sun 4 11 18 25 2 9	
									or		



escription	✓ begins with ✓ Attention	

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.

Created On	✓ equals	v 01/06/2023 00:00	
Description	<ul> <li>✓ begins with</li> </ul>	~ Attention	
Modified On	✓ less than	v 01/06/2023 00:00	
Select Row Delete	~		

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

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

Created On	~ equals	✓ 01/06/2023 00:00 □ ▼	<b>-</b>
Description	<ul> <li>✓ begins with</li> </ul>	~ Attention	
Modified On	✓ less than	√ 01/06/2023 00:00 🗐 🔻	-

Figure 200: Grouping option with three rows

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

√ 01/06/2023 00:00 🗐 🕶
√ 01/06/2023 00:00
→ Attention
✓ 01/06/2023 00:00 🗍 🕶

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

- o DocumentsCorePack: 2017.169
- o 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.



Condition Field					( <u></u> )		×
$\uparrow_{-}^{-\Box}$ Condition Field propert	ies						2
Condition Field							
Condition Name/Description:	MyFirstCondition						
	44 chars left						
Relation:	document						
Conditional block (if statement)	next to each other	) one below the other					
Conditional Formatting Format - Style Format - Apply to		New     Force full style update					
Use existing condition			~	Copy & Ne	W		
Designer							
: 편ြ Group AND 편 Group OR	∑ Delete ✓						
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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 <u>here</u>.


Condition Field					<u></u>		×
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Condition Field							
Condition Name/Description:	MyFirstCondition						
	44 chars left						
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Conditional Formatting							
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Format - Apply to		↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓					
Use existing condition			×.	Copy & I	New		
Designer	∑ Delete ✓						
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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.



Condition Field			- 0	×	Advanced T
The Condition Field propertie	25			2	Standard Additional
					Search for a field
Condition Field					Double click the fields to insert them
Condition Name/Description:	MyFirstCondition				(Deprecated) Process Stage
	44 chars left				- (Deprecated) Traversed Path Account
Relation:	document				- Account Name
Conditional block (if statement)			Consta New Style from Formatti	1	2 ×
Create else block	next to each other	O one below the other	Create New Style from Pormatti	ng	· ^
Conditional Formatting			Propertys	Child	
Format - Style		V New	<u>N</u> ame: Style type:	Paragraph	
Format - Apply to			Style based on:	¶ Normal	
Use existing condition			<u>Style for following paragraph:</u>	¶ Style1	
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			Only in this <u>d</u> ocument ON	ew documents based on this templa	te
			Format -		OK Cancel

Figure 205: Style selection section

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

**1** 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.)

**2** 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.

**3** 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.

	nromating	?	
operties			
<u>N</u> ame:	1 MyFirstStyle		
ityle <u>t</u> ype:	2 Paragraph		
tyle <u>b</u> ased on:	3 ¶ Normal		
tyle for following p	paragraph: ¶ MyFirstStyle		
matting			
Segoe UI	V 11 V B I U Automatic V		
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Sample Text San Text Sample Text San Sample Text San Following Paragra Following Paragra Following Paragra Font: Segoe UI, Styl- Based on: Normal Add to the <u>S</u> tyles g Only in this <u>d</u> ocum	mple Text Sample Text Sample Text Sample Text Sample Text Sam At Sample Text Sample Text Sample Text Sample Text Sample Text mple Text Sample Text Sample Text Sample Text Sample Text aph Following Paragraph Following Paragraph Following Paragraph Follo aph Following Paragraph Following Paragraph Following Paragraph Following paragraph Following Paragraph Foll	ple Text Sample Sample Text owing Paragraph owing Paragraph	ancel



**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.



Condition Field		<u></u>		×
<u> </u>	ties			2
Condition Field				
Condition Name/Description:	MyFirstCondition	12		
	44 chars left			
Relation:	document			
O Conditional block (if statement)				
Create else block	next to each other			
Conditional Formatting				
Format - Style	New New			
Format - Apply to	Paragraph Force full style update MyFirstStyle			
Use existing condition	Copy &	New		
Negate condition				
Designer				
[편] Group AND [편] Group O	Delete			
0	~			
	OK		Cano	el.

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.



Condition Field				×
$2^{-\Box}$ Condition Field prope	rties			?
Condition Field				
Condition Name/Description:	MyFirstStyle	2		
	48 chars left			
Relation:	document			
O Conditional block (if statement				
Create else block	next to each other			
Conditional Formatting				
Format - Style	MyFirstStyle ~ New			
Format - Apply to	First Table Incide Field			
Use existing condition	Parent Table Co	py & New		
Negate condition	Parent Row			
Designer				
[편] Group AND [편] Group C	R X Delete			
	×			
		ЭК	Cano	el

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



Insert Field				
Insert as Picture Field		-		
Insert as Picture-Link-Field			_	
Insert as Document				
Insert as HTML				
Insert as Inspection				
Insert Static Item	•			
insert Computed Item	•		QR Co	de
nsert DocuSign Item	•		Advan	ced String
Insert AssureSign Item	•		Calcul	ated field
insert AdobeSign Item	×		Hyper	ink
			Condit	tion field
			Promp	t Field
			DateTi	me Field

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.

Condition Field	rties			× ?
Condition Field				
Condition Name/Description:	Short Description as part of the Name			
Relation	60 chars left			
Conditional block (if statement)	uocament			
Conditional Formatting Format - Style Format - Apply to				
Use existing condition		Copy & New		
Group AND 📇 Group OR	✓ Delete			
		ок	Cano	cel

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

Condition Field			<u></u> -		×
$\stackrel{\bullet}{}_{}^{}$ Condition Field prope	erties				?
Condition Field					
Condition Name/Description:	Short Description as part of	f the Name:			
	60 chars left			-	
Relation:	document			]	
O Conditional block (if statement	)				
Create else block	next to each other	🔘 one below the other			
Conditional Formatting					
Format - Style	No mail	~ New			
Format - Apply to	[	Force ful style update			
Use existing condition	First Table Inside Field Parent Table		🗸 🛛 Copy & New		
Negate condition	Parent Cell Parent Row				
Designer					
🔚 Group AND 📇 Group Ol	R 📣 Delete				
	~				

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.

Name¤	<u>Email</u> ¤	Fax¤	Mail¤	Phone¤	X
Max-White	Do-Not-Allows	Allows	Allowa	Allow¤	×
Jack·Black¤	Allow¤	Do·Not-Allow¤	Allow¤	Allow¤	×
Johny-Red¤	Allow¤	Allows	Allow¤	Do:Not-Allow#	×
Frank-Stro¤	Allows	Allows	Do-Not-Allows	Allow¤	×
Luis-Muster	Do-Not-Allow#	Allows	Allows	Allow¤	×
Dan-Flen#	Do-Not-Allow#	Allows	Allow#	Allowa	×

#### Table-style1-apply-to-row--no-Force-full-style-update¶

1

#### Table-style1-apply-to-row-Force-full-style-update¶

Dan-Flen¤	Do-Not-Allows	Allows	Allows	Allow	8
Luis-Muster#	Do-Not-Allows	Allow	Allows	Allow	×
Frank-Stro¤	Allowa	Allow¤	Do-Not-Allow#	Allow¤	×
Johny-Red¤	Allow¤	Allow¤	Allow¤	Do:Not-Allow¤	×
Jack-Black¤	Allow¤	Do·Not·Allow¤	Allow¤	Allow¤	×
Max-White <sup>×</sup>	Do-Not-Allow	Allow	Allow	Allows	×
Name¤	Email¤	Fax¤	Mail¤	Phone×	×

¶

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.

Name¤	Email¤	Fax¤	Mail¤	Phone¤	×
Max∙White¤	Do-Not-Allows	Allow¤	Allow¤	Allow¤	2
Jack·Black¤	Allowa	Do·Not-Allows	Allow¤	Allow¤	×
Johny-Red¤	Allow¤	Allow¤	Allow¤	Do-Not-Allow¤	×
Frank Strop	Allow¤	Allow¤	Do-Not-Allow¤	Allow¤	R
Luis-Muster¤	Do Not Allows	Allows	Allows	Allow¤	1
Dan-Flen¤	Do-Not-Allows	Allow¤	Allows	Allow¤	×

#### Table-style1--apply-to-cell---no-Force-full-style-update¶

¶

#### Table-style1--apply-to-cell--Forcefull-style-update¶

Name¤	Email¤	Fax¤	Mail¤	Phone¤	×
Max∙White¤	Do-Not-Allows	Allows	Allowa	Allow¤	×
Jack·Black¤	Allowa	Do·Not·Allows	Allow¤	Allow¤	ø
Johny-Red¤	Allow¤	Allowa	Allow¤	Do-Not-Allow¤	×
Frank Strop	Allows	Allow¤	Do-Not-Allow¤	Allow¤	×
Luis-Muster¤	Do-Not-Allows	Allows	Allows	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 <u>here</u> 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.



Insert Field			
Insert as Picture Field Insert as Picture-Link-Field		6	
Insert as Document			
Insert as HTML			
Insert as Inspection			
Insert Static Item	•		
Insert Computed Item	•		QR Code
Insert DocuSign Item			Advanced String
Insert AssureSign Item	•		Calculated field
Insert AdobeSign Item	•		Hyperlink
			Condition field
			Prompt Field
			DateTime Field

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.



	Computed Field	<u> </u>		Х
1	Computed Fiel	d properties		?
2	Change or set the Comp	uted <mark>Field</mark>		
-	Search for a field			2
0	Select the fields that show	uld be used in y	our Patter	n
3	Skip Price Calculation Status Status Reason Time Zone Rule Versi Total Amount 	n ion Number		^
	- Total Detail Amount			
	Total Detail Amount Total Discount Amou	(Base) Int		~
-	Your Pattern for this prop	erty		
4	< <totalamount>&gt; +&lt;<totalamount>&gt;*&lt;<t< td=""><td>otalamount&gt;&gt; </td><td></td><td>^</td></t<></totalamount></totalamount>	otalamount>>		^
	Placeholder Text (optiona	I);		~
	Formatting options			
5	Example:			1
C.	Format:			$\sim$
6	Culture:			$\sim$
-		ок	Cancel	

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.



DocumentsCore Choose your document process.	Pack Dialog	* X
Personal Note * Display discount code Select delivery terms *	✓ 30 days after payment	~
Visit us on SummIT21 *	26.10.2021 10:00	
	Next	Cancel

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.



F	ile Home Insert Draw Design	Layout	Refere	nces Mailings F	Review View Dev	eloper	1 www.mscrn	n-addon	is.com	ments 🖉 Editing	👻 🖻 Share 👻
	Save Template	s Save as	Templa Explor	te Import Char	t Documents Core Pack Settings	<b>?</b> Help	Open LOG Folder Delete LOG Files Open latest ~	CRM1	Manage Connection	ns	
-	Templates Get Dat	a	Explor	er Charts	Settings	Help	Debug		Environments		~
L	1 + 1 + 1 + 1 + 1 + 1 + 1 + 1 + 1 + 2 + 1 + 3 + 1 + +	4 • 1 • 5 •	1 · 6 · 1 · 7	· · · 8 · · · 9 · · · · 10 ·	( + 11 + ( + 12 + ( + 13 + ( + 1	4 · 1 · 15 · 1			DocumentsCoreP	ack Tomplate	
-	Template Settings						- 0	×	Type Account (account)		· D · ^
100	Template Settings		Dun much V						e 3 Advance	d Template Settings	
12010	Deserved Manager Cabled		Prompt X	ML					Standard Additional		
-	Document Name and Subject	Prompt	XML						Search for a field		
. 1 .	General	Editor	XML						Double click the fields to inse	rt them	
2 - 1	Create Activities For	A	dd Prompt	Edit Prompt	Delete Prompt		$\wedge \checkmark$		(Deprecated) Process Sta	je	^
1.1.1	Document Protection		Name		Туре	Dis	olayName		(Deprecated) Traversed P Account	ath	
1.1.1	Sub Folder								- Account Name Account Number		
÷ - 1									Account Rating		
in .	Client Automation Settings								- Address 1: Address Type		
- 9	Client Automation									n	
1.1	E-Mail (Create Activity)								Address 1: County		
1 - 7	A.L								Address 1: Freight Terms		
	Aavanced Settings								Address 1: ID Address 1: Latitude		
- 6	Additional Fields								Address 1: Longitude		
1.1.1	Sharepoint Metadata								- Address 1: Post Office Bo	x	
1 - 10	Dynamic Document Properties									ct Name hod	
-11 -	Demosio Watermark								Address 1: State/Province		
12 . 1	Kennove Watermark								- Address 1: Street 2		
11	Debugging								Address 1: Street 3 Address 1: Telephone 2		
1 - 13	Prompts 4								Address 1: Telephone 3		
.14.	Section Configuration								Address 1: UTC Offset		
1.5	Sector comparation								Address 1: ZIP/Postal Coo Address 2	le	
1.1.4	Electronic Signature								Address 2: Address Type		
1 - 16									Address 2: City Address 2: Country/Regio	n	
. 11 .									- Address 2: County		~
18 . 1	10					c	K Cance	el l	Insert Field	•	ø
- Page	e 1 of 1 0 words German (Austria) Text P	redictions	On 🐻	CAccessibility: Goo	d to go				(D) Focus	<b>-</b>	<b>•</b> + 94%

Figure 218: Prompts - Advanced Template Settings

#### The Prompt Editor allows you to:

- 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.

H	ield pro	operties					
ompt S	etup						
isplay ame	DateT	lime		Require	d		
/pe	DateT	lime 🗸 🗸		Allow line breaks			
	DateT	lime (default)					
	Date Date Time	Fime (default)					
ibels		Language	Label				
		English (United St	Visit us o	n SummerIT2	1		
		10	~				
					_		

2 19: Date Lime Prompt

3 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.

Prompt Se	eld properties	- 🗆 ×
Display Name Type	PersonalNote 1 Text Checkbox Select DateTime	Required
3	Language English (United St	Label PersonalNote
		4 OK Cancel

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.

Insert as Picture Field Insert as Picture-Link-Field Insert as Document Insert as HTML Insert Static Item	•	QR Code Advanced String Calculated field		
Insert Computed Item	•	Hyperlink	Personal_Note	
Insert DocuSign Item	•	Condition field	Demo_Checkbox	Demo_Select - Option
Insert AssureSign Item	- > [	Prompt Field 🕨	Created_on	2 Demo_Select - Option
Insert AdobeSign Item		DateTime Field	Demo_Select	Demo_Select - Option

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.

< <personalnote>&gt;</personalnote>	Personal Note
< <checkbox>&gt;</checkbox>	Display discount code
< <select -="" 1="" option="">&gt;</select>	Select delivery terms - 30 days after payment
< <select -="" 2="" option="">&gt;</select>	Select delivery terms – As per description
< <datetime>&gt;</datetime>	Visit us on SummIT 2021

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.

DateTime Field		( <u></u> )		×
🛟 DateTi	me Field prop	oerties (		2
Change or set t	the DateTime Fi	eld		
Search for a field.	5			Q
Select the fields	that should be	used in	your Patt	tern
	d) Traversed Pat me umber ting Address Type	h		
•				,
Your Pattern for	this property			
				~
				4
Placeholder Text	(Optional):			
Output Format:	DateTime			$\sim$
Formatting opt	ions			
Example:				
Format:				~
L				
Culture:				~

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.



DateTime Field		1000		×
🛟 DateTi	me Field prop	oerties		2
Change or set t	he DateTime Fi	eld		
Search for a field.	2			2
Select the fields	that should be	used in y	your Patt	ern
<ul> <li>(Deprecated)</li> <li>(Deprecated)</li> <li>Account</li> <li>Account Na</li> <li>Account Ra</li> <li>Account Ra</li> <li>Address 1</li> <li>Address 1:</li> <li>Your Pattern for</li> <li>&lt;&lt; expireson&gt;&gt;</li> </ul>	d) Process Stage d) Traversed Pat me imber ting Address Type <b>this property</b> .Add(5,days)	h		*
				4
Placeholder Text	(Optional):			
Output Format:	DateTime			$\sim$
Formatting opt	ions			
Example:				
Format:				~
Culture:				~
	ОК		Cano	el

**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 225: DateTime Field Syntax



DateTime Field		5 <u>000</u>		×
DateTi	me Field prop	erties		2
Change or set t	he DateTime Fie	eld		
Search for a field.				P
Select the fields	that should be	used in y	our Patt	ern
<ul> <li>(Deprecated)</li> <li>(Deprecated)</li> <li>Account</li> <li>Account Na</li> <li>Account Na</li> <li>Account Ra</li> <li>Address 1</li> <li>Address 1: J</li> <li>Address 1: J</li> </ul> Your Pattern for < <expireson>&gt; 1 Placeholder Text</expireson>	1) Process Stage 1) Traversed Path me Imber ting Address Type <b>this property</b> Add(5, days)	1		< <
Output Format:	DateTime			~
Formatting opt	ions			
Example:				
Format:				~
Culture:				~
	ОК		Cano	el

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.

Thedialogprovidesuswithdifferentoptionsfor **1** DateTime and **2** Difference (subtraction of two dates) results.Difference (subtraction of two dates) results.Difference (subtraction of two dates) results.Based on this type we will have one of the two following dialogs.Difference (subtraction of two dates) results.



DateTime Field — 🗆 🗙	DateTime Field — 🗆 🗙
DateTime Field properties	DateTime Field properties
Change or set the DateTime Field	Change or set the DateTime Field
Search for a field	< <effectivfrom>&gt;</effectivfrom>
Select the fields that should be used in your Pattern	Preferred Facility/Equipment (Facility/Equipment)
<ul> <li>(Deprecated) Process Stage</li> <li>(Deprecated) Traversed Path</li> <li>Account</li> <li>Account Name</li> <li>Account Number</li> <li>Account Rating</li> <li>Address 1</li> <li>Address 1: Address Type</li> <li>Your Pattern for this property</li> <li>&lt;<expireson>&gt;.Add(5,days)</expireson></li> </ul>	<ul> <li>Preferred Resource (Deprecated) (Bookable Resou</li> <li>Preferred Service (Service)</li> <li>Preferred User (User)</li> <li>Primary Contact (Contact)</li> <li>Product Price List (Price List)</li> <li>Sales Acceleration Insights ID (Sales acceleration in</li> <li>Sales Tax Code (Tax Code)</li> <li>Segment Id (Segment)</li> <li>Service Territory (Territory)</li> <li>SLA (SLA)</li> <li>Territory (Territory)</li> <li>Work Hour Template (Work template)</li> </ul>
	Your Pattern for this property
Placeholder Text (Optional): Due by Output Format: DateTime	< <effectiveto>&gt;-&lt;<effectivfrom>&gt; ^</effectivfrom></effectiveto>
Example: Monday, 5 June 2023	Placeholder Text (Optional): Effective time in days
Format: D 🗸	Output Format: Difference 2
Culture: English (Austria) 🗸	Time Unit: Days 🗸
OK Cancel	OK Cancel

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.



AutoSave Off	⊟ ∽ Ѷ () ∓ R	esult1036216194.docx 🔘 Gene	eral 🗸	Q	System Administrator	lä	- 0	×
File Home Insert	Draw Design Layout	References Mailings I	Review View Deve	loper Help	www.mscrm-addons.com		C Editing ~	6 -
<ul> <li>Open Template</li> <li>Save Template</li> <li>Insert MailMerge Field</li> <li>Templates</li> </ul>	Choose Send as Save as Data PDF ~ DOCX ~ Get Data	Documents Core Pack Settings Settings Help	Open LOG Folder Delete LOG Files Open latest ~ Debug	CRM168820	Manage Connections New Connection Environments			v
L 1 + 1 + 1 + 1 + 1		1 • 4 • 1 • 5 • 1 • 6 • 1 •	7 • 1 • 8 • 1 • 9 • 1 •	10 + 1 + 11 + 1	· 12 · 1 · 13 · 1 · 14 · 1 · 15 ·	· ' _ ' '	x 1 x 1 x 1 x	
8 - 1 - 2 - 1 - 7 - 1 - 7 - 1 - 7 - 1 - 7 - 1 - 7 - 1 - 7 - 1 - 7 - 1 - 7 - 1 - 7 - 1 - 7 - 1 - 7 - 7	Due by: Saturday, 7 Ju	ıly 2023						
Page 1 of 1 🚺 Germ	an (Austria) Text Predictions: Or	10	Γ쿓 Di	splay Settings	(D), Focus 💷 🔳	ē - —		- 120%

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





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

### • Function table

	Description	Example
Function		
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>&gt;.Add(10,year)</createdon>
Subtract(value, unit)	Subtracts a numeric value from the current date. The first parameter represents the	< <createdon>&gt;.Subtract(10,year)</createdon>



	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> &gt;.Addbusinessdays(10)</createdon>
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>&gt;.Round(quarter,up) &lt;<createdon>&gt;.Round(half,down) &lt;<createdon>&gt;.Round(full)</createdon></createdon></createdon>



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

# 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.

# 2 Ribbon settings

The following settings allow limiting the option shown in the **mscrmaddons.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.

#### Contextmenu

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

#### 4 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.

# 5 Debugging

 Activate Debugging: Debugging helps our support team to identify and correct errors and investigate issues you might experience when using DocumentsCorePack. <u>This article</u> describes how to activate debugging.

# **6** 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.

# ⑦ 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. <u>Learn</u> more.



Documents Core Pack Settings			×
Settings	General		
General	Global Settings		_
Advanced	Default Entity: AAD User		
PDF Settings	Default direction for documents added to Dynamics 365 is 'OUTGOING'		
Documents Core Pack	Default closed letter status reason:		
About	Provide SharePoint User Use ADAL for Sharepoint		_
3	Contextmenu Demo Templates Import Debugging Debugging Create Activity' - Button visible Import Debugging Create Activity' - Button visible Import Debugging Create Activity' - Button visible Import		
	☑ Activate Debugging		
6	Dynamics 365 Settings		
	Default App: (None) V Default Browser: Microsoft Edge V		
0	Dataprovider Settings		
	☑ Do not use Dataprovider		
	ОК	Canc	el

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

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

# Over the settings (\*.docx)

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

# Word 97-2003-Template settings (\*.dot)

- Automatically merge to a new Document
  - Data source
  - o 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. <u>Learn</u> 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



Documents Core Pack Settings		<u>(313)</u>		×
Settings	Advanced Settings			
General	Messages			
Advanced	Don't show aggregation switch warning			
PDF Settings	☑ Don't show template type selection message			
Desuments Core Pack	Don't show insert bool as checkbox message			
Documents Core Pack	Don't show save dialog to view document properties			
About	2 Metadata			
	Update metadata automatically			
	Use split requests (for slower connections)			
	☑ Notify when Metadata changed			
	Word template settings (*.docx)			
	☑ Bulk merge - Use destination styles			
	Insert CC - Add a Blank after inserting a field			
	Word 97-2003-Template settings (*.dot)			
	Automatically merge to a new Document.			
	Data source HTML 👻			
	Query (FetchXML) Generation			
	Use Deep Fetch Analyzer for new Templates 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			
	ОК		Canc	el

Figure 232: Advanced tab

# 7.3. PDF Settings (Deprecated)

# **1** PDF Settings

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

# **2** Outlook Client Settings

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

# Outlook Info

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



Documents Core Pack Settings			×
Settings	PDF Settings		
General	DDE Sattinge		_
Advanced	Attack document as DDE to the activity		
DDE Sattinge	Delete PDF after attaching		
PDF Settings	Use 'Send as PDF' with Outlook		
Documents Core Pack	PDF Printer:		
About	2 Outlook Client Settings		
	Enable Outlook Account Settings		
	Outlook Account		
	Save E-Mail message before sending		
	3 Outlook Info		
	☑ Outlook installed		
	Dynamics 365 Outlook Client loaded		
	Dynamics 365 Outlook Client is Offline capable		
	Oppmanics 365 Offline Client		
	Opynamics 365 Light Client		
	ОК	Cano	:el

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.



Information		×
Yo to Ex	u are no local administrator, some funtionalities of this ol might not work properly! ecute the program as administrator to avoid any issues. ould you like to continue anyway?	
	Yes No	

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.

DCP Diagnostics			<u> </u>		×
Diagnose	1 Diagnose				
System Information	2 ✓ CrossBrowserLaun ✓ DocumentsCorePa ✓ Microsoft.Office.In	cher (cbl.exe) is registered ck Word Addin (Template terop.Word is registered	d Designer)	is enabled	t
Tools	3 ✓ SharedObjects is re X LoadBehavior CU ii ✓ LoadBehavior LM ✓ LoadBehavior LM ✓ Addin loaded succ !! No permission to ed rights to perform these	gistered in GAC s not present has the correct value (3) 32bit has the correct value essful it registry. Please make su e actions or run the appli	e (3) ure you hav cation as ad	ve the nec dministrat	essary tor.
	J Diagnose successfully perform	red (last run @12:50)			
	Diagnose successfully perform	ed (last run @12-50) Repair Addin			

Figure 237: DCP Diagnostics tool surface


## 9.1. The Diagnose tab

This tab provides you with a general overview.



Figure 238: Diagnose tab

**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.

DCP Diagnostics		1	$\times$
Diagnose	System Information:		
System Information	OS: Windows 10 Enterprise 64-Bit .Net Framework Runtime Version: 4.0.30319.42000 Net Framework Installed Version: 4.8.04084		
Tools	Net Framework installed Version: 4.8.04084 Office Version: 16.0.16731.20170 DCP Version: 10.44.8595.20095 Default Browser: No Found Mozilla Firefox Version: 112.0.2 Google Chrome Version: 116.0.5845.142 Internet Explorer Version: 11.789.19041.0 Microsoft Edge Version: Not available		

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:

Metadata
Debugging
GAC Install
and Misc.

DCP Diagnostics		– 🗆 X
Diagnose	Metadata	
System Information	Open Me	etadata Folder
system mormation	Archive an	d Save Metadata
lools	Debugging Debugging is enabled Enable Open Debug Folder GAC Install	Disable
	Bro	wse Files
	Install GAC	Uninstall GAC
4	Misc	2
		Repair Install
		Open Office Trust Center Log

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 <u>here</u> 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** 

<u>Source</u>

#### 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.

<u>Source</u>



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# 13. Contact

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