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# Dynamic filters, reporting & data preview during template design

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# Data Preview: Show sample data during template design

1. Open settings

The screenshot shows the 'Treeview Settings' dialog box. It has a title bar with 'Treeview Settings' and a close button. Below the title bar is a section 'Change the Treeview behavior'. Under 'TreeView Tooltip', there are several checkboxes: 'Name' (checked), 'Displayname' (checked), 'Fullname' (unchecked), 'Description' (checked), 'Type' (unchecked), 'Defaultvalue' (unchecked), 'isCustomfield' (unchecked), 'Entityname' (unchecked), 'ReferencingAttribute' (unchecked), and 'ReferencedAttribute' (unchecked). Under 'Other Settings', there are checkboxes for 'Add fields without DisplayName' (unchecked) and 'Mark used Fields in Tree' (unchecked), and a 'TreeView starting width' spinner set to 376. Under 'Sample Data', there is a 'Record:' field with a search icon and a dropdown menu showing 'Choose a value...'. Below that is a 'Highlight Color:' field with a red color swatch and a 'Link data limit (1:N, M:N):' spinner set to 2. Under 'Search', there are checkboxes for 'Name' (checked), 'DisplayName' (unchecked), and 'Description' (unchecked). At the bottom are 'OK' and 'Cancel' buttons.

2. Choose record

The screenshot shows the 'Look Up Record' dialog box. It has a title bar with 'Look Up Record' and a close button. Below the title bar is a search icon and the text 'Look Up Record'. Under 'Enter your search criteria', there is a 'Name:' field with a search icon and a dropdown menu showing 'Search for records'. Below that is a table with two columns: 'Account Name' and 'Primary Contact (Corr ^'. The table contains the following data:

Account Name	Primary Contact (Corr ^
A. Datum Corporation	Rene Valdes
Adventure Works	Nancy Anderson
Alpine Ski House	Paul Cannon
Blue Yonder Airlines (sample)	Sidney Higa
Bungie	Commander Zavala
City Power & Light	Scott Konersmann
Coho Winery	Bailey Moss
Cortoso Pharmaceuticals	Robert Lyon
Fabrikam, Inc.	Maria Campbell
Fourth Coffee	Yvonne McKay
Litware, Inc.	Susanna Stubberod
North Winds	Alex Wu
Partner Sample	Partner Admin
Speedy Network	

At the bottom of the dialog, there is a 'Max. Results:' spinner set to 250, a 'Show all records' checkbox (unchecked), and 'Records: 26'. At the bottom right are 'OK' and 'Cancel' buttons.

3. See values in treeview

The screenshot shows the 'DocumentsCorePack Template Design' dialog box. It has a title bar with 'DocumentsCorePack Template De..' and a close button. Below the title bar is a 'Type' dropdown menu set to 'Account (account)'. Under 'Advanced Template Settings', there is a 'Standard' tab and an 'Additional' tab. Below the tabs is a search field with the text 'Search for a field...'. Under 'Double click the fields to insert them', there is a list of fields with their values in red text:

- (Deprecated) Process Stage
- (Deprecated) Traversed Path
- Account [[621C9A67-8A59-EA11-A811-000D3A579C3F]]
- Account Name [City Power & Light]
- Account Number
- Account Rating [Default Value]
- Active Opportunity Count
- Address 1 [3397 Rancho View DriveRedmond, WA 90000 U.S.]
- Address 1: Address Type
- Address 1: City [Redmond]
- Address 1: Country/Region [U.S.]
- Address 1: County
- Address 1: Fax
- Address 1: Freight Terms
- Address 1: ID [[78EFC8BC-D4ED-4524-8C12-2A1ED7E9EE6B]]
- 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 [WA]
- Address 1: Street 1 [3397 Rancho View Drive]
- Address 1: Street 2
- Address 1: Street 3

At the bottom of the dialog, there is an 'Insert Field' dropdown menu and a settings icon.

[How to: Activate Data Preview via Sample Data](#)



# Dynamic filters & advanced reporting

Dynamic filters allow to pass dynamic information into the data query for your template.

- Sources:
- Attribute (field value) of the selected record
  - User defined values from the DocumentsCorePack Dialog ([via user prompts](#))

DocumentsCorePack Dialog

Generates a document based on the records data. [Click here](#) to see how to create templates

Invoice Due From \* 20.10.2021

Invoice Due Until \* 31.10.2021

Next Cancel



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Invoice Report 27. October 2021

Expected payments from **2021-10-20** to **2021-10-31**

Invoice	Due Date	Total
INV-01000-G4G1M0 AttachmentExtractor	10/29/2021	€3,984
INV-01006-D1T0G1 300 * TI + PS + SB	10/25/2021	€29,700
INV-01003-N6Y3W2 AttachmentExtractor Package	10/25/2021	€2,400
		<b>€ 36 084,00</b>

# Demo:

## Step-By-Step:

- Configuration of Data Preview settings for our template.
- Overview of setting up a Dynamic Filter
- Reporting using a Dynamic Filter

## Helpful resources:

- Step-by-Step: [Setup Dynamics filters in DocumentCorePack templates](#)
- Step-by-Step: [How to define user prompts templates](#)
- Step-by-Step: [Adding charts to DocumentsCorePack templates](#)

## Availability:

- DocumentsCorePack Server: v2020.105 required ([Check Version & Upgrade](#))
- DocumentscorePack Client: v10.25 required ([Download](#))

# Thank You, & Stay Safe!

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