



**mscrm-addons.com**

Your company for MS-CRM ADD-ONS!

# Introduction to the DocumentsCorePack Template Designer

Clint Higley | [clint.higley@mscrm-addons.com](mailto:clint.higley@mscrm-addons.com)

Michael Dohr | [michael.dohr@mscrm-adddons.com](mailto:michael.dohr@mscrm-adddons.com)

# Design Templates for Microsoft Dynamics 365, PowerApps & Flow



## Key Values:

- Microsoft Word based
- Mapping of fields from Dynamics 365 / CDS
- Properties (document name, protection,..)
- Support for complex elements
  - Conditions,
  - e-Signature tags,
  - Calculations,
  - ...



Available on  
Microsoft AppSource

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

The screenshot displays a Microsoft Word interface with a Dynamics 365 email template. The ribbon includes 'File', 'Home', 'Insert', 'Design', 'Layout', 'References', 'Mailings', 'Review', 'View', and 'Help'. The 'Design' ribbon is active, showing options like 'Open Template', 'Save Template', and 'Insert MailMerge Fields'. The template content includes a header for 'TCS The Computer Shop' with contact details. The main body contains a quote section with a 'QUOTE' label and a 'No <<quotenumber>>' error message. A blue arrow points from the error message to the 'DocumentsCorePack Templat..' sidebar, which shows a list of fields for 'Potential Customer' including 'Account Name'.



# Demo & Roadmap

## Demo:

- Create a basic template
  - Design document in MS Word
  - Map fields from Dynamics / CDS
- Define a document name
- Test template
- Deploy template

## Roadmap:

- Document Explorer
- Charting :D
- User-defined date-filters / Reporting

[ DEMO ]

[ ROADMAP ]

# Thank You

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

US: +1 404 720 6066

Europe: +43 (316) 680 880

ussales@msrm-addons.com

sales@msrm-addons.com