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Conditional Content in Word Templates for Dynamics 365

Conditional Content

Business Requirement / Popular Use Cases



Requirement: Content inside documents needs to vary based on field values inside Dynamics

Problems:

- Multitude of „similar“ templates
- High template maintenance
- Word (if/else) confusing in complex scenarios

Goal:

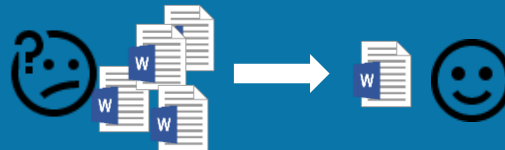
- Provide powerful but simple configuration
- Reduce # of templates



How?

Apply Conditions to parts of your template based on Field values:

- All field types supported
- Combination possible (AND/OR operations)
- If/Else automation



Popular Use Cases

- Salutation based on Gender
Dear Mr / Dear Mrs
- Compact address – block
Remove address2 if empty
- Tax/Discounts
Only show if applicable
- Terms and Conditions / Legal verbiage varies State by State

Helpful Links

Blog: [Condition Fields](#)

DocumentsCorePack: [DocumentsCorePack on Microsoft AppSource](#)

Condition Field Designer

Quickly create Conditions in DocumentsCorePack

With the Condition Field Designer you can create, edit and reuse conditional logic in your template

Capabilities:

- “Advanced Find” like condition designer
 - And/OR
 - All Attribute types supported
- Re-Use defined conditions
- Negate Conditions
- e.g. Show Promo if customer State returns “Georgia” or “Florida:
 - Add contact details from GA/FL
 - Insert state specific content
 - Insert a picture
 - Insert Table

Condition Field

Condition Field properties

Condition Field

Condition Name/Description: My Condition
48 chars left

Relation: document

Conditional block (if statement)

Create else block

Use existing condition

Negate condition

next to each other one below the other

Copy & New

Designer

Group AND Group OR Delete

Total Discount Amount has data

Potential Customer (Account)

OR

Address 1: State/Province equals GA

Address 1: State/Province equals FL

OK Cancel

Demo & Roadmap

Step-by-Step Live Demo

Part 1) Overview of the Condition Field Designer

Part 2) Creating a simple condition and how to reuse it in your template

Part 3) Creating a complex condition using the advanced features

Roadmap:

- **Conditional Formatting:**
 - Change format of content based on field values (show negative numbers in red/green)
- **Condition Management Console:**
 - Simplify configuration and modification of field properties

Thank you!

Support & Contact

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

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