



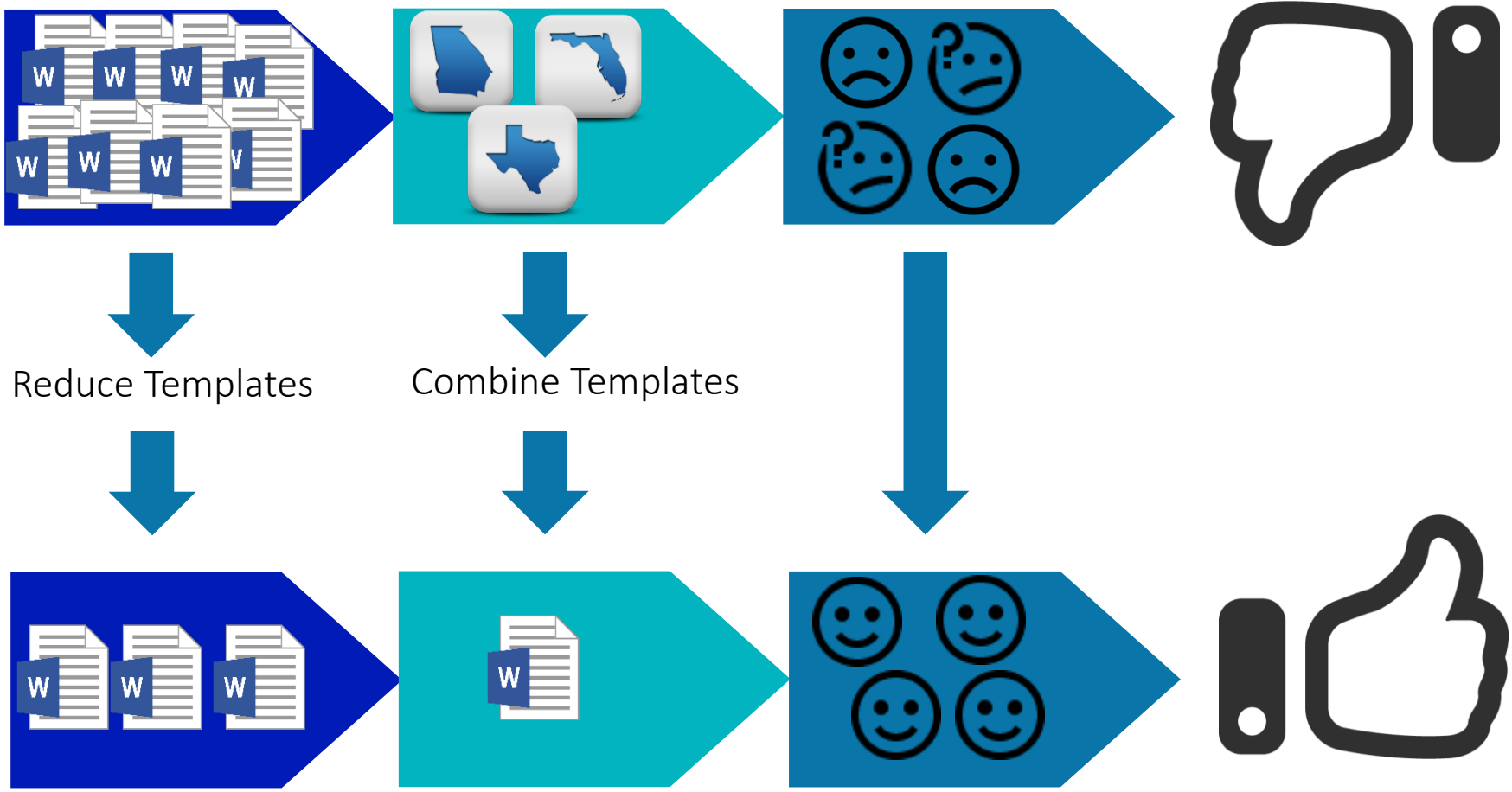
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Essential template tricks on how to build
smart DocumentsCorePack templates

Word Field Codes

Why would you use them? -> Dynamic Content



Word Field Codes

What is a Field Code?

Microsoft defines a Field Code as placeholder for data that might change in a document giving you precise control over dynamic text in your document.

Important field codes

- **If-Condition**
{if" <<CRM_FIELD>>"="CompareValue" "Content if condition is fulfilled" "Content if condition is not fulfilled"}
- **Format strings:**
 \@, „dddd, MMM d, yyyy“
 = „Thursday, June 1, 2017“
- ***Cardtext**
 3 -> *Three*
- ***Ordinal**
 1 -> *1st*

Examples:

- Salutation (Dear Mrs. vs Dear Mr.)
- Shipping Information based on Shipping Method or Freight Terms
- Terms and Conditions based on Country/State

e.g. If customer State returns “Georgia”:

- Add contact details from GA
- Insert state specific content
 - Insert a picture
 - Insert Table

Demo

Field Functions and how to use them

Part 1) Inserting Fields and formatting them using Switches

Part 2) Show how to use if/else conditions

Part 3) Extending the if/else conditions using compare, starts with, ends with and contains

Part 4) When to use SET and REF

Helpful Links:

- Field Code Overview: <https://support.office.com/en-us/article/Field-codes-Formula-field-32d5c9de-3516-4ec3-80ed-d1fc2b5bc21d?ui=en-US>
- List of Field Codes in Word: <https://support.office.com/en-us/article/List-of-field-codes-in-Word-1ad6d91a-55a7-4a8d-b535-cf7888659a51>
- Conditions: <http://www.msrm-addons.com/Blog/PostId/9603/if-else%E2%80%93conditions-in-docx-templates>
- Graham Mayor's Formatting Word fields with switches: http://www.gmayor.com/formatting_word_fields.htm

Thank you!


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- 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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