**Welcome to the MSCRM-ADDONS.com DocumentsCorePack sample template instructions**

This template is an easy-to-use account sales report template.  
You can execute this template against any account record that meets the following requirements:

* Basic account record information (e.g. name, primary contact)
* Related quote records
* Related invoice records
* Related opportunity records

To have the best experience, we recommend adding basic values to your quote, invoice, and opportunity records.

This template gives an overview of the basic sales entities related to one specific account.  
It starts with an Advanced Stringfield that displays the account and the year in one field, followed by the primary contact. Using a standard Table of Contents from Microsoft Word outlines how easy it is to combine Word features with DocumentsCorePack templates. The Overview section shows you the total number of related opportunities, quotes, and invoices for this year and the total amounts. Within the Details area, you can find three separate tables which outline the single records per entity.

The following DCP features were used to build this template.  
All features are referenced as comments in this document’s MS Word markup section.

* Document name ([LINK](https://support.mscrm-addons.com/knowledgebase/document-name-dynamics-365))
* Insert account name in combination with the current date as Advanced String ([LINK](https://support.mscrm-addons.com/knowledgebase/advanced-string-dynamics-365/)/[LINK](https://support.mscrm-addons.com/knowledgebase/how-to-insert-the-current-date-with-the-datetime-function))
* Datetime field properties ([LINK](https://support.mscrm-addons.com/knowledgebase/field-formatting-options/#datetime))
* Insert dynamic aggregation relationship table ([LINK](https://support.mscrm-addons.com/knowledgebase/how-to-use-aggregation-properly-when-creating-templates/))
* Insert dynamic relationship table ([LINK](https://support.mscrm-addons.com/knowledgebase/how-do-i-create-relationships-using-documentscorepack-template-designer-advanced))

Please review these step-by-step instructions to see how to use/create this template:

[https://support.mscrm-addons.com/knowledgebase/**step-by-step-how-to-create-an-account-sales-report-template**](https://support.mscrm-addons.com/knowledgebase/step-by-step-how-to-create-an-account-sales-report-template)

**Name+Datetime**

<<primarycontactid\_fullname>>

[Overview 2](#_Toc112098912)

[Details 3](#_Toc112098913)

[Opportunity 3](#_Toc112098914)

[Quote 3](#_Toc112098915)

[Invoice 3](#_Toc112098916)

|  |
| --- |
| Overview |

|  |  |  |
| --- | --- | --- |
| **Advanced String** | Total Number (count) | Total Amount (sum) |
| **Opportunity** | <<opportunityid>> | <<estimatedvalue>> |
| **Quote** | <<quoteid>> | <<totalamount>> |
| **Invoice** | <<invoiceid>> | <<totalamount>> |

|  |
| --- |
| Details |

|  |  |  |  |
| --- | --- | --- | --- |
| Opportunity | Est. Revenue | Est. Close Date | Status |
| <<name>> | <<estimatedvalue>> | <<estimatedclosedate>> | <<statecode>> |
|  |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Quote | Total Amount | Created On | Status |
| <<name>> | <<totalamount>> | <<createdon>> | <<statecode>> |
|  |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Invoice | Total Amount | Due Date | Status |
| <<name>> | <<totalamount>> | <<duedate>> | <<statecode>> |
|  |  |  |  |