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

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

* Basic invoice record information (i.e. customer, total amount, invoice products)

To have the best experience, you can add discounts or tax values in addition to the essential information.

This template has a customer-based table at the top, filled with 'customer' and its primary-contact fields. Followed by an ‘Invoice Product’ and ‘Product’ relationship table, this table has an additional conditional ‘discount’, ‘tax’, and ‘total’ row at the end.

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 current date as Advanced String ([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 relationship table ([LINK](https://support.mscrm-addons.com/knowledgebase/how-do-i-create-relationships-using-documentscorepack-template-designer-advanced))
* Condition field ([LINK](https://support.mscrm-addons.com/knowledgebase/how-to-insert-condition-fields-in-documentscorepack-template-designer))
* Join tables ([LINK](https://support.mscrm-addons.com/knowledgebase/the-insert-join-tables-button-in-open-office-xml-template-docx))

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

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

|  |  |  |
| --- | --- | --- |
| **<<customerid\_account\_name>><<customerid\_contact\_fullname>>**  <<customerid\_account\_primarycontactid\_fullname>><<customerid\_contact\_address1\_composite>>  <<customerid\_account\_address1\_composite>> |  |  |
| Invoice ID: | **<<invoicenumber>>** |
| Payment terms | **<<paymenttermscode>>** |
| Due date | **<<duedate>>** |

|  |
| --- |
| **Invoice** |

Dear <<customerid\_account\_primarycontactid\_firstname>><<customerid\_contact\_firstname>>,

Thank you for your business.

|  |  |  |  |
| --- | --- | --- | --- |
| **Product** | Price | QTY | Total |
| <<invoiceid\_productid\_name>> | <<priceperunit>> | <<quantity\_ovalue>> | <<baseamount>> |
|  |  |  | <<totallineitemamount>> |

|  |  |  |  |
| --- | --- | --- | --- |
|  | Discount | - | <<totaldiscountamount>> |

<<jointables>>

|  |  |  |  |
| --- | --- | --- | --- |
|  | Tax | + | <<totaltax>> |

<<jointables>>

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Total** |  | **<<totalamount>>** |

If you have any questions concerning this invoice, please don’t hesitate to contact us.