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

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

* Basic lead record information (e.g first name, last name)
* Basic owning user information (e.g first name, last name, primary email)

To have the best experience, we recommend adding a telephone number to your owning user record's ‘Main Phone’ field.

In this very easy-to-understand lead template, you can see the most basic version of a letter. Since everything in this template is designed within a table, it is perfect to use as an email template. You can see lead and user information fields at the top, followed by static text which contains lead and user information. This showcases how easy the formatting of static text and DocumentsCorePack fields can be.

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))
* Hyperlink ([LINK](https://support.mscrm-addons.com/knowledgebase/insert-hyperlink-dynamics-365/))
* Condition field ([LINK](https://support.mscrm-addons.com/knowledgebase/how-to-insert-condition-fields-in-documentscorepack-template-designer))

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-initial-contact-template-for-a-lead/)**[step-by-step-how-to-create-an-initial-contact-template-for-a-lead](https://support.mscrm-addons.com/knowledgebase/step-by-step-how-to-create-an-initial-contact-template-for-a-lead/)**[/](https://support.mscrm-addons.com/knowledgebase/step-by-step-how-to-create-an-initial-contact-template-for-a-lead/)

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| **<<firstname>> <<lastname>>**<<emailaddress1>><<address1\_composite>> |  | **MSCRM-ADDONS.COM****<<owninguser\_firstname>> <<owninguser\_lastname>>**<<owninguser\_internalemailaddress>> |
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| --- |
| **INITIAL CONTACT** |
| DATE  |

**Dear <<firstname>> <<lastname>>,**Thank you very much for your interest in our product. My name is <<owninguser\_firstname>> <<owninguser\_lastname>>, and I would like to introduce myself as your contact person.Your inquiry is important to us. Therefore, I would like to schedule a short call to discuss it in detail. Please let me know what your preferred method of communication is.If you have any questions, please don’t hesitate to contact me via email or phone.Yours sincerely,<<owninguser\_firstname>> <<owninguser\_lastname>> |