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

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

* Basic quote record information (i.e. customer, total amount, quote 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 a ‘Quote 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))
* Remove watermark ([LINK](https://support.mscrm-addons.com/knowledgebase/remove-watermark-in-template/))

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-a-quote-template/%22%20%5Ct%20%22_blank)**[step-by-step-how-to-create-a-quote-template](https://support.mscrm-addons.com/knowledgebase/step-by-step-how-to-create-a-quote-template/%22%20%5Ct%20%22_blank)**[/](https://support.mscrm-addons.com/knowledgebase/step-by-step-how-to-create-a-quote-template/%22%20%5Ct%20%22_blank)

|  |  |  |
| --- | --- | --- |
| **<<customerid\_name>><<customerid\_contact\_fullname>>**<<customerid\_address1\_composite>><<customerid\_contact\_address1\_composite>> |  |  |
| Quote ID: | **<<quotenumber>>** |
| Primary contact: | **<<customerid\_primarycontactid\_fullname>>** |
| E-Mail: | **<<customerid\_primarycontactid\_emailaddress1>>** |

|  |
| --- |
| **Quotation** |

We appreciate your interest in our company and products. We’re pleased to quote as follows.

|  |  |  |  |
| --- | --- | --- | --- |
| **Product** | Price | Qty | Total |
| <<quoteid\_productid\_name>><<description>> | <<priceperunit>> | <<quantity\_ovalue>> | <<baseamount>> |
|  | Subtotal**:Total:** |  | **<<totallineitemamount>>** |

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

<<jointables>>

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

<<jointables>>

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

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