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

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

* Basic contact record information (e.g. first name, last name)
* Basic owning user information (e.g. first name, last name, primary email)
* At least one account record is in your system.

In this very easy-to-understand contact 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 contact information fields at the top, followed by static text which contains the total number of accounts. A dynamic hyperlink shows the email address of the owning user.

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))
* Insert dynamic relationship aggregation value ([LINK](https://support.mscrm-addons.com/knowledgebase/how-do-i-create-relationships-using-documentscorepack-template-designer-advanced))
* Hyperlink ([LINK](https://support.mscrm-addons.com/knowledgebase/insert-hyperlink-dynamics-365/))

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-welcome-letter-template-for-a-customer/)**[step-by-step-how-to-create-a-welcome-letter-template-for-a-customer](https://support.mscrm-addons.com/knowledgebase/step-by-step-how-to-create-a-welcome-letter-template-for-a-customer/)**[/](https://support.mscrm-addons.com/knowledgebase/step-by-step-how-to-create-a-welcome-letter-template-for-a-customer/)

|  |  |
| --- | --- |
| **<<parentcustomerid\_account\_name>>**  **<<firstname>> <<lastname>>**  <<address1\_composite>> | **DATE** |

|  |
| --- |
| **Welcome aboard!** |

Dear <<firstname>> <<lastname>>,

We appreciate your trust in our products and that you want to do business with us.

We look forward to working with you to help you get the most out of our services and to realize your business goals.

Our services are used by <<Total number of accounts>> companies like yours. We hope that we’ll meet your expectations.

Our excellent customer support team is available 24/7 to help you with any questions.

Your satisfaction is a priority for us, so feel free to share any feedback you have – we take your opinion seriously and will do our best to implement solutions for you.

Best Regards,

<<owninguser\_firstname>> <<owninguser\_lastname>>

Feel free to contact me via Email for further inquiries.