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

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

* Basic work order record information (e.g. reported by, promised time, Service Account, WO Summary)
* Related task records
* Related work order product records
* Related work order service records

**For the best experience, we recommend filling your work order with all the details Microsoft suggests on their getting started page.**

This template has an informational work order detail table at the top, filled with 'promised time' and ‘service address’ fields—followed by a ‘General’ table that outlines all the basic information about your active unscheduled work order. The ‘Tasks’, ‘Products’, and ‘Services’ tables provide an overview of the most critical information for the field worker before the work order gets scheduled.

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))
* Grouping ([LINK](https://support.mscrm-addons.com/knowledgebase/how-to-group-tables-in-documentscorepack-docx-templates/))

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-work-order-template/" \t "_blank)**[step-by-step-how-to-create-a-work-order-template](https://support.mscrm-addons.com/knowledgebase/step-by-step-how-to-create-a-work-order-template/" \t "_blank)**[/](https://support.mscrm-addons.com/knowledgebase/step-by-step-how-to-create-a-work-order-template/" \t "_blank)

|  |  |  |
| --- | --- | --- |
| **Promised Time** | | **Service Address** |
| From: | <<msdyn\_timefrompromised>> | <<msdyn\_address1>>  <<msdyn\_postalcode>> <<msdyn\_city>>  <<msdyn\_stateorprovince>>  <<msdyn\_country>> |
| To: | <<msdyn\_timetopromised>> |
|  |  |

|  |
| --- |
| **General** |

|  |  |  |  |
| --- | --- | --- | --- |
| WO Number: | <<msdyn\_name>> | WO Status: | <<msdyn\_systemstatus>> |
| Reported by: | <<msdyn\_reportedbycontact\_fullname>> | Sub Status: | <<msdyn\_substatus\_msdyn\_name>> |
| Location: | <<msdyn\_worklocation>> | WO Type: | <<msdyn\_workordertype\_msdyn\_name>> |
| Service Account: | <<msdyn\_serviceaccount\_name>> | Billing Account: | <<msdyn\_billingaccount\_name>> |
| WO Summary: | <<msdyn\_workordersummary>> | | | |

|  |
| --- |
| **Tasks** |

|  |  |  |
| --- | --- | --- |
| **Name** | **Est. Duration** | **% Complete** |
| <<msdyn\_name>> | <<msdyn\_estimatedduration>> | <<msdyn\_percentcomplete>> |

|  |
| --- |
| **Products** |

|  |  |  |
| --- | --- | --- |
| **Name** | **Est. QTY** | **Status** |
| **<<msdyn\_product\_product\_subjectid>>** | | |
| <<msdyn\_name>> | <<msdyn\_estimatequantity>> | <<msdyn\_linestatus>> |

|  |  |  |
| --- | --- | --- |
| **Services** | | |
| **Name** | **Est. Duration** | **Status** |
| **<<msdyn\_service\_product\_subjectid>>** | | |
| <<msdyn\_name>> | <<msdyn\_estimateduration>> | <<msdyn\_linestatus>> |