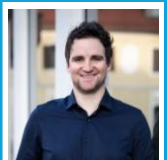


The DocumentsCorePack Office Add-In



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What is the Office Add-In?

“The Office Add-In is an **updated version of the Template Designer** designed to be more **user-friendly** and **easier to install & maintain**.”

Activation via
Office Add-In
Store



Cross platform
(Windows,
MacOs, Web)



Automatically
updated



Aligned with
M365 security
standards



Future-proof



Office Add-In vs. Classic Template Designer

Feature	 Office Add-In	Classic Template Designer (COM Add-In)
Deployment & Maintenance	Centrally maintained via the Office Store. No local installs or updates needed.	Requires local installation on each machine and periodic manual updates.
Platform Compatibility	Windows, MacOS, Word Online	Windows only (MS Word desktop)
User Experience	More modern experience.	“slightly” outdated windows and dialogs.
IT & Security	Simplifies IT administration. Always up to date. No executables.	Local installations may trigger security reviews. More effort for IT to manage & maintain
Template Design	Template design capabilities for Dynamics 365*	Full template design capabilities for Dynamics 365

*Some advanced features, such as charting, are not yet available.



■ Relationship Designer, Filtering & Sorting

Add Relationship

☒ N:1 (Lookups)
 ☐ 1:N
 ☐ M:N
 ☐ Separate Table

Name	Source	Target
Account -> Quote Line (msdyn_serviceaccount)	Account	Quote Line (msdyn_serviceaccount)
Agreement -> Quote Line (msdyn_agreement)	Agreement	Quote Line (msdyn_agreement)
Currency -> Quote Line (transactioncurrencyid)	Currency	Quote Line (transactioncurrencyid)
Price List -> Quote Line (msdyn_pricelist)	Price List	Quote Line (msdyn_pricelist)
Product -> Quote Line (productid)	Product	Quote Line (productid)
Product Association -> Quote Line (productassociationid)	Product Association	Quote Line (productassociationid)
Quote -> Quote Line (quoteid)	Quote	Quote Line (quoteid)
Quote Line -> Quote Line (parentbundleid)	Quote Line	Quote Line (parentbundleid)
Quote Line -> Quote Line (parentbundleidref)	Quote Line	Quote Line (parentbundleidref)
Tax Code -> Quote Line (msdyn_salestaxcode)	Tax Code	Quote Line (msdyn_salestaxcode)
Team -> Quote Line (owningteam)	Team	Quote Line (owningteam)
Territory -> Quote Line (msdyn_serviceterritory)	Territory	Quote Line (msdyn_serviceterritory)
Unit -> Quote Line (uomid)	Unit	Quote Line (uomid)
User -> Quote Line (createdby)	User	Quote Line (createdby)
User -> Quote Line (createdonbehalfby)	User	Quote Line (createdonbehalfby)
User -> Quote Line (modifiedby)	User	Quote Line (modifiedby)
User -> Quote Line (modifiedonbehalfby)	User	Quote Line (modifiedonbehalfby)
User -> Quote Line (owninguser)	User	Quote Line (owninguser)
User -> Quote Line (salesrepid)	User	Quote Line (salesrepid)

☐ Quote

☒ [1..*] Quote -> Quote Line (quoteid)
 ☐ [*..1] Product -> Quote Line (productid)

Filters

AND

Choose a related entity

Contains data

ⓧ

AND

+ Add

Product type

Equals

Project-based Service

ⓧ

+ Add



Live Demo:

- Activating the DCP Office Add-In
- Step-by-Step:
 - Connecting to your environment
 - Mapping fields into your template
 - Access related data

- **What happens when I switch to the new Add-In?**

Templates are converted when saved via the new Add-In. Always create a backup first (automatic backups coming soon).

- **Can I use the new Office addin and the classic template designer side-by-side?**

Yes. Both can run in parallel, so you can test or start using the new Add-In without losing access to the Classic one. **Note:** While possible in most scenarios, we don't recommend switching back and forth for individual templates.

- **When should I use the new Office Add-In vs. the Classic Add-In?**

- **Office Add-In (new):** Best for new and standard templates; cross-platform.
- **Classic Add-In (COM):** Best for complex templates (e.g., charts, custom FetchXML).

- **Is there a cost associated to the new Add-In?**

No – all included in your DCP subscription.





PowerPoint Support

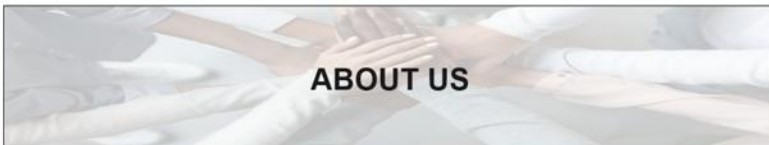
QUOTATION – SLIDE TEMPLATE

Company Name: XXXX
Address: XXXX
Phone Number: XXXX

QuoteID: XXXX
Date: XXXX

Description	Quantity	Unit Price	Total
	XXX	XXX	XXX
	XXX	XXX	XXX
			

ABOUT US




Blanca Jane
Lead content


Cathy Rogers
Designer


Melissa Brown
Creative marketing


Becca Johnson
Creative marketing


Liza Compton
Creative marketing


Thomas Jackson
Lead content


Peter Diggs
Designer


Arnold Smith
Lead content


Lucas Oliver
Creative marketing


Harrison Brand
Marketing



Table Designer

Quote#	QuoteNrShort	Qty	Price	Total
<<productid_product_new_category>>				
	<<productid_product_name>> <<productid_product_description>>	<<quantity_o value> >	<<priceper unit_ov alue>>	<<extended amount_ov alue>>
Sub Total: <<extendedamount_ovalue>>				
Sum: <<totallineitemamount>>				
Discount: <<discountpercentage>>%: -Discount% x Total Detail amount / 100				



Quote#	QUO-01020	Qty	Price	Total
Building Materials				
	Concrete Mix (80 lbs) Pre-mixed concrete blend for easy preparation.	500	€ 6,00	€ 3.000,00
	Plywood Sheets (4x 8) High-quality, smooth-surfaced plywood for cabinetry, furniture making, and general construction.	50	€ 47,00	€ 2.350,00
	Weather-resistant and easy-to-install panels available in a variety of colors.	200	€ 10,00	€ 2.000,00
Sub Total: € 7.350,00				
Paint & Painting Supplies				
	Paint Roller Kit Includes a roller frame, two roller covers, a paint tray, and liners.	25	€ 21,00	€ 525,00
	Paint Sprayer Lightweight and easy-to-use sprayer for professional-quality finishes.	20	€ 94,00	€ 1.880,00
	Painters Tape (1.5-inch x 60 yd) Clean-release tape for sharp paint lines.	50	€ 6,00	€ 300,00
Sub Total: € 2.705,00				
Sum: €10,055.00				
Discount: 10.00%: -€ 1.005,50				
Total: € 9.049,50				



- **Free Trials Available** for all Add-Ons
- No functional limitations
- Fully supported
- ~"30" minutes to get started



Available on
Microsoft AppSource

Thank you!



support.mscrm-addons.com



[Youtube Channel \(How To's, Webinars\)](#)

