



Word and Excel Templates

Dynamics 365 allows customers to leverage the power of Excel and Word. Document Templates allow users to create system and/or personal reports that can pull data from D365. The Word Template makes including Dynamics data into documents much easier than in past versions and you don't have to waste time recreating your document formatting every time. In Excel, you can set up your formulas, charts and formatting once and then just update with the data from Dynamics.

COURSE OBJECTIVE: To prepare Word to create templates and create a simple Word Template. To create a simple Excel Template.

LESSON 1: Set Up Word to Create CRM Templates

- Task 1: Enable the Developer Tab
- Task 2: Download Word Template from CRM
- Task 3: Enable XML Mapping for CRM data

LESSON 2: Create a Word Template and Add CRM Fields

- Task 1: Setting up Word Document or Copying from an Online Source
- Task 2: Including CRM fields in your Word Document
- Task 3: Create a Table from CRM Records in your Document

LESSON 3: Using your Word Template in CRM

- Task 1: Upload your Template as a System or Personal Template
- Task 2: Running Template from a Record
- Task 3: Removing/Updating Templates

LESSON 4: Download Excel Template for CRM

- TASK 1: Where to locate Excel Templates

LESSON 5: Manipulating Excel Data

- TASK 1: Name Columns, Fields, Ranges
- TASK 2: Create Formulas on a new sheet

LESSON 6: Using Your Excel Template in CRM

- Task 1: Upload your Template as a System or Personal Template
- Task 2: Running Template from a View
- Task 3: Updating Formula Results in Template
- Task 4: Removing/Updating Templates