



Description Template

For Microsoft Dynamics 365 / CRM

User Guide

Solution Version: 365.092018.1.0

Document Version: V1.0



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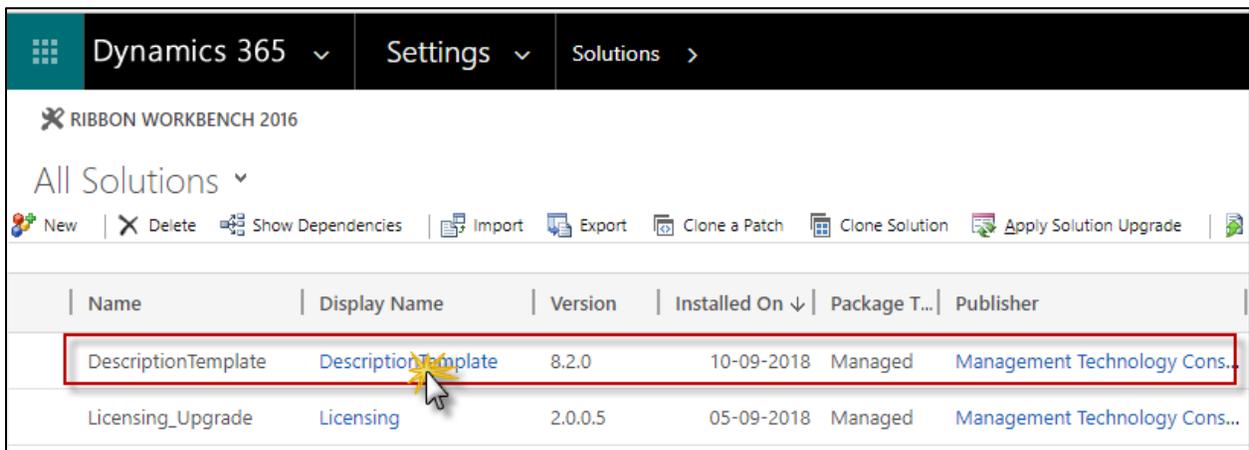
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Product Overview

Description Template from MTC helps CRM Users to create huge collection of description templates which can later be picked easily at record level from the dropdown to populate in the desired fields.

Configuration

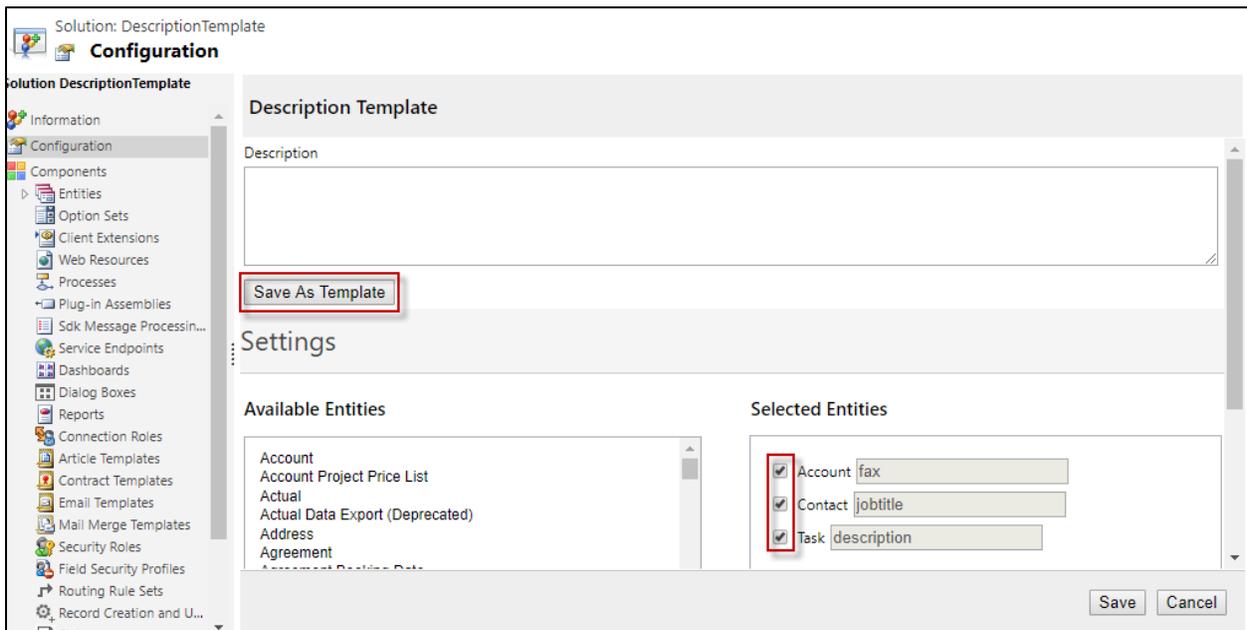
1. Go to CRM → Settings → Solutions.



The screenshot shows the Dynamics 365 interface. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. Below this is the 'RIBBON WORKBENCH 2016' and a dropdown menu for 'All Solutions'. A ribbon contains various actions: 'New', 'Delete', 'Show Dependencies', 'Import', 'Export', 'Clone a Patch', 'Clone Solution', and 'Apply Solution Upgrade'. A table lists installed solutions with columns for Name, Display Name, Version, Installed On, Package T..., and Publisher. The 'DescriptionTemplate' solution is highlighted with a red box, and a mouse cursor is pointing at the 'DescriptionTemplate' link in the Display Name column.

Name	Display Name	Version	Installed On	Package T...	Publisher
DescriptionTemplate	DescriptionTemplate	8.2.0	10-09-2018	Managed	Management Technology Cons...
Licensing_Upgrade	Licensing	2.0.0.5	05-09-2018	Managed	Management Technology Cons...

2. Click **Description Template** solution.
3. Go to **Configuration** Page.
4. You will notice **Description** Box where you can enter the description and save as template.

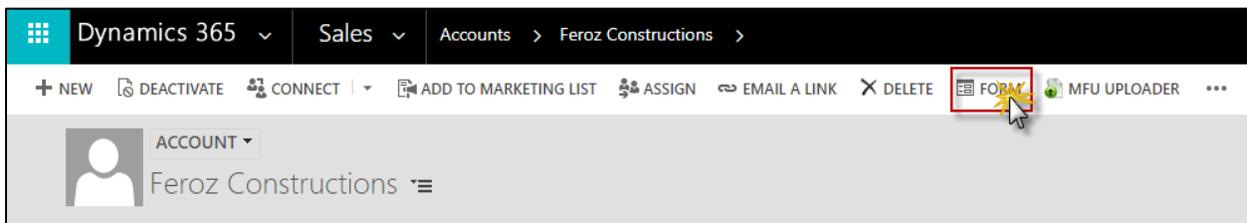


Just below you can see the entities list on the left-hand side column from where you can select the entities of your choice and click the double arrow to see them reflected on the right-hand side column, i.e., **Selected Entities**. In the right-hand side column, you need to tick the check box of that entity and **enter the logical name of the field** (Only string fields and multiple line fields are allowed) where you want to populate the description template. Click **Save**.

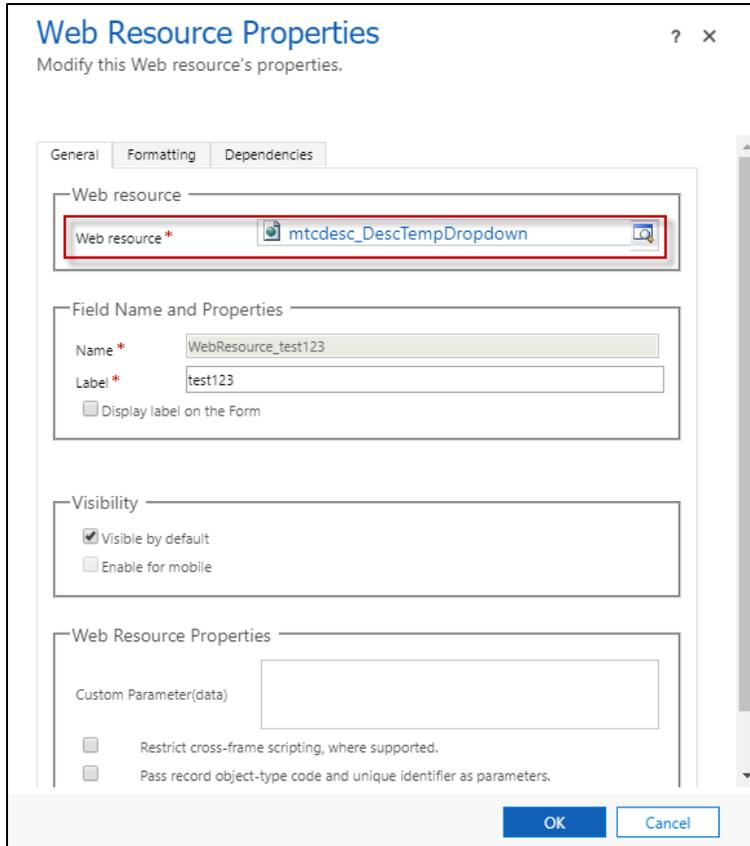


*Note: If you are re-selecting an entity for configuration then the solution will display an alert saying that **the selected entity already exists**.*

5. Go to the configured entity (e.g., **Account in this case**) and open any record.
6. Click **FORM** on the ribbon to add **Web Resource**.



7. In the form, select the area where you want add the Web Resource and Click on Web Resource under Insert tab.
8. Add Web Resource “mtcdesc_DescTempDropdown” (Hint: Just enter mtcdesc and the hit the search icon to get the web resource).



Web Resource Properties
Modify this Web resource's properties.

General Formatting Dependencies

Web resource

Web resource * mtcdesc_DescTempDropdown

Field Name and Properties

Name * WebResource_test123

Label * test123

Display label on the Form

Visibility

Visible by default

Enable for mobile

Web Resource Properties

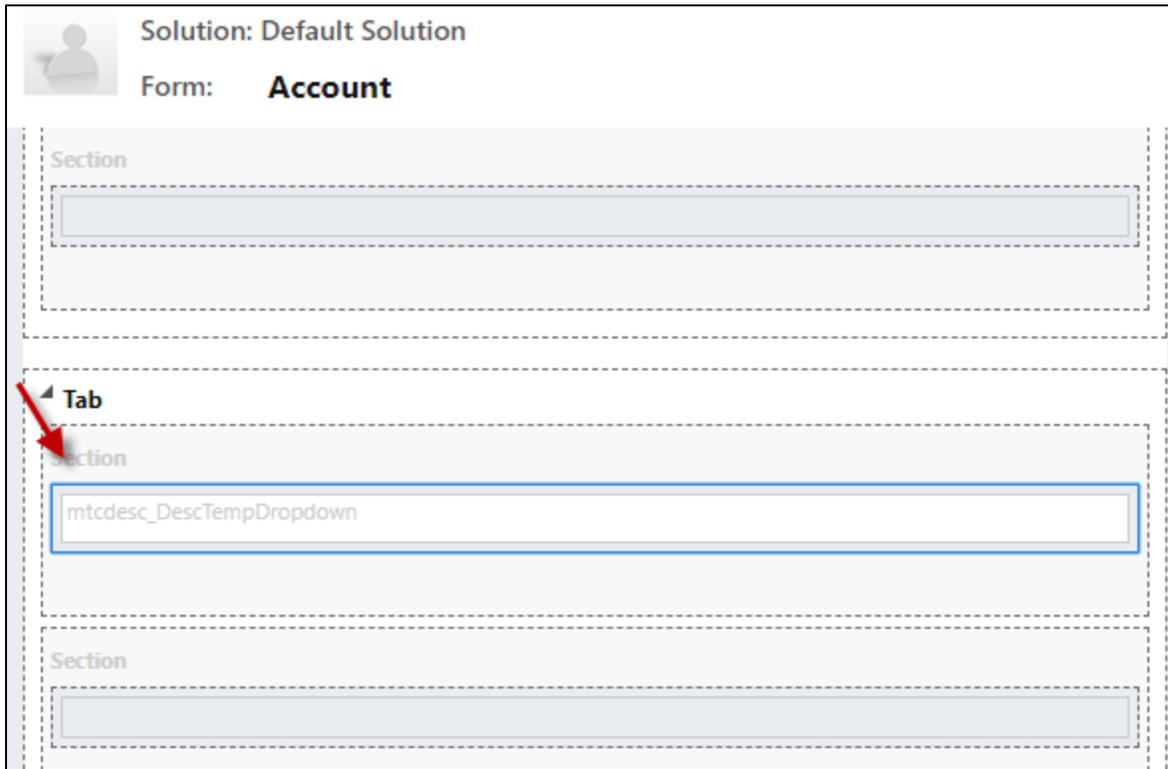
Custom Parameter(data)

Restrict cross-frame scripting, where supported.

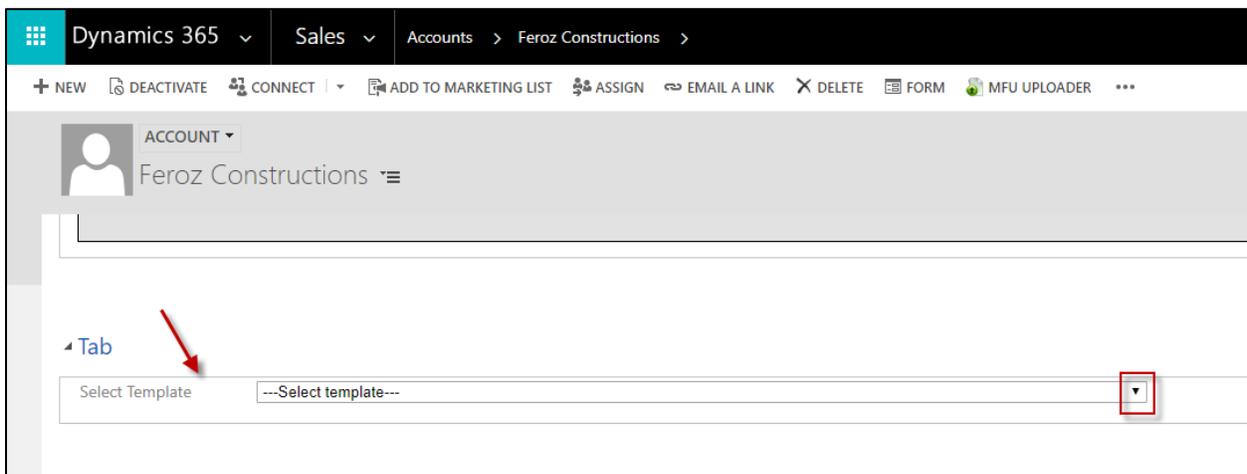
Pass record object-type code and unique identifier as parameters.

OK Cancel

9. Enter Field Name. Label will be the same as Field Name. Click OK. Save and Publish.



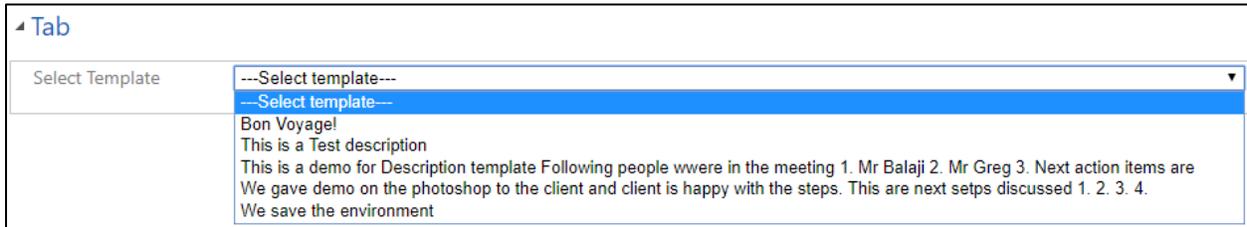
10. Go back to the record and refresh the page. You will notice that the web resource has been added successfully.



Functionality

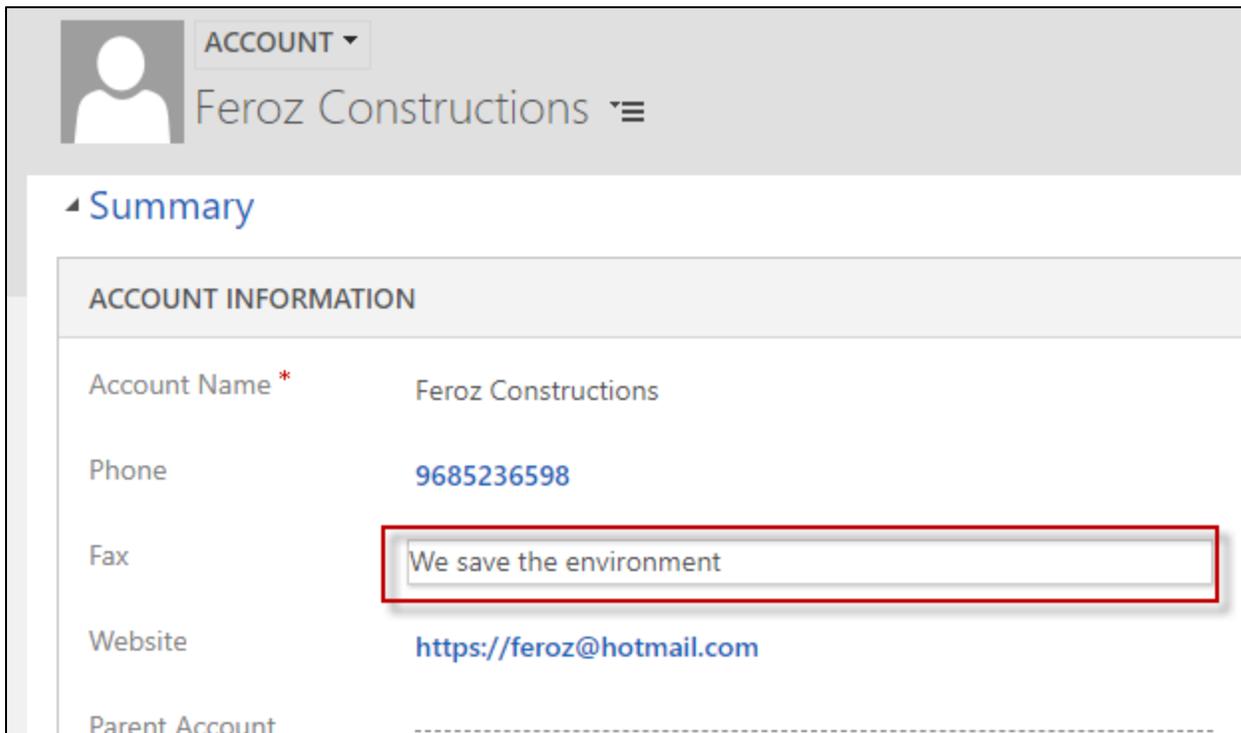
Open any Account record.

Select the desired description template from the dropdown.



A screenshot of a dropdown menu in a software interface. The menu is titled "Tab" and has a "Select Template" label. The dropdown list contains several options: "---Select template---", "---Select template---" (highlighted in blue), "Bon Voyage!", "This is a Test description", "This is a demo for Description template Following people wwere in the meeting 1. Mr Balaji 2. Mr Greg 3. Next action items are", "We gave demo on the photoshop to the client and client is happy with the steps. This are next setps discussed 1. 2. 3. 4.", and "We save the environment".

You will notice that this description template will be populated in the field whose logical name matches with the logical name being given in the configuration settings.



A screenshot of an account record in a software interface. The account name is "Feroz Constructions". The "ACCOUNT INFORMATION" section shows the following fields: "Account Name" (Feroz Constructions), "Phone" (9685236598), "Fax" (We save the environment), "Website" (https://feroz@hotmail.com), and "Parent Account" (-----). The "Fax" field is highlighted with a red box.

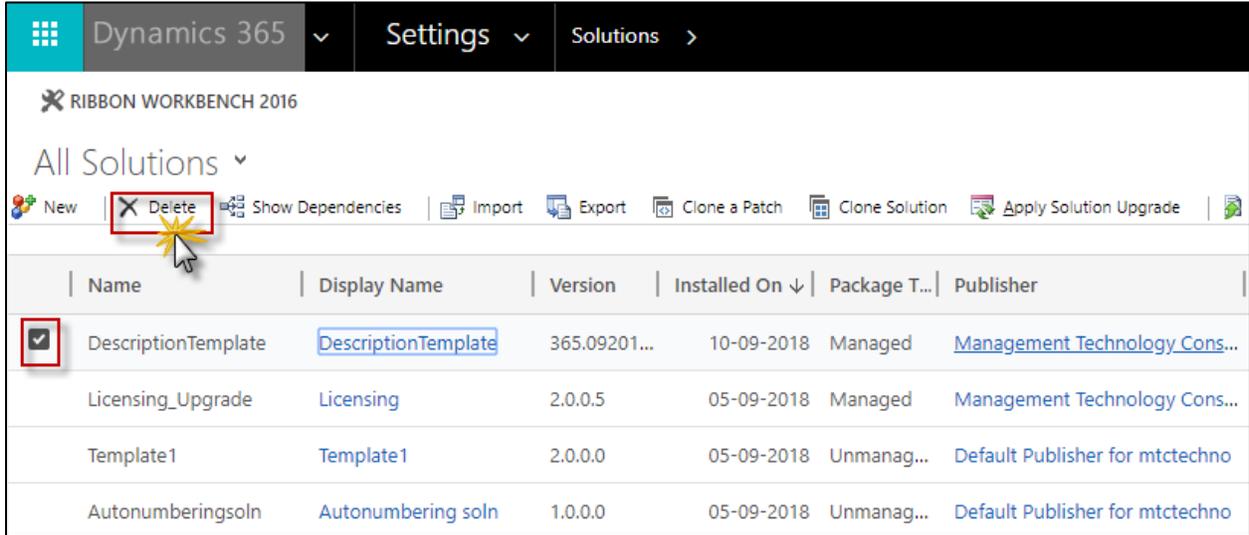
As the logical field name given was fax, you can see the description template being populated in the fax field.

Likewise, you can configure description template on multiple entities with your chosen logical field name.

Uninstallation

For uninstalling the solution, go to Solutions Page in your CRM.

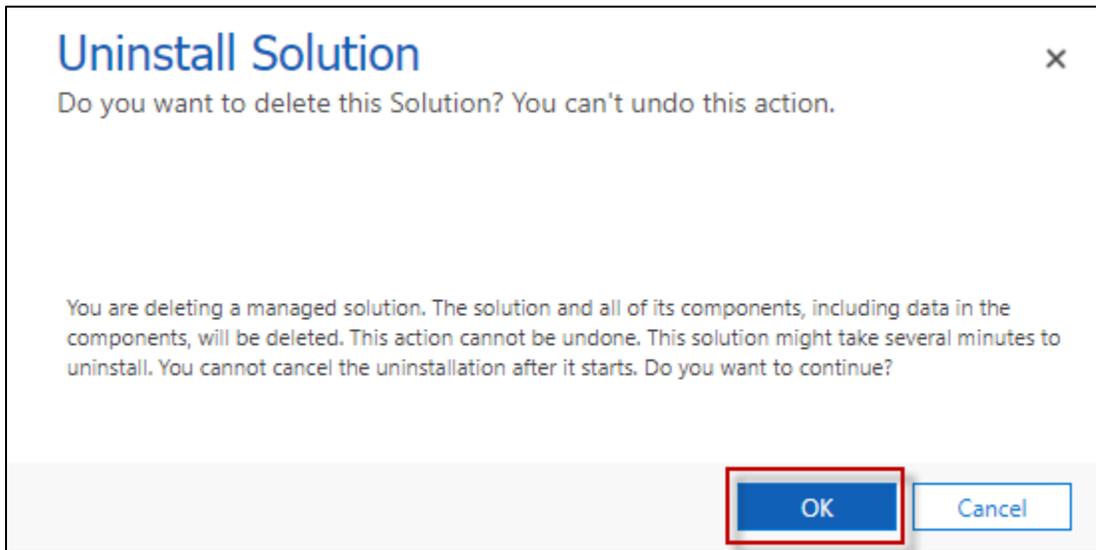
Select the Solution listing and click Delete.



The screenshot shows the Dynamics 365 interface with the 'Solutions' page open. The ribbon includes 'New', 'Delete', 'Show Dependencies', 'Import', 'Export', 'Clone a Patch', 'Clone Solution', and 'Apply Solution Upgrade'. The 'Delete' button is highlighted with a red box and a mouse cursor. Below the ribbon is a table of solutions with columns: Name, Display Name, Version, Installed On, Package T..., and Publisher. The 'DescriptionTemplate' solution is selected, indicated by a red box around its checkbox.

Name	Display Name	Version	Installed On	Package T...	Publisher	
<input checked="" type="checkbox"/>	DescriptionTemplate	DescriptionTemplate	365.09201...	10-09-2018	Managed	Management Technology Cons...
<input type="checkbox"/>	Licensing_Upgrade	Licensing	2.0.0.5	05-09-2018	Managed	Management Technology Cons...
<input type="checkbox"/>	Template1	Template1	2.0.0.0	05-09-2018	Unmanag...	Default Publisher for mtctechno
<input type="checkbox"/>	Autonumberingsoln	Autonumbering soln	1.0.0.0	05-09-2018	Unmanag...	Default Publisher for mtctechno

An alert prompt to confirm deletion will be displayed. Click OK.



The screenshot shows a dialog box titled 'Uninstall Solution' with a close button (X) in the top right corner. The text inside reads: 'Do you want to delete this Solution? You can't undo this action.' Below this, a warning message states: 'You are deleting a managed solution. The solution and all of its components, including data in the components, will be deleted. This action cannot be undone. This solution might take several minutes to uninstall. You cannot cancel the uninstallation after it starts. Do you want to continue?' At the bottom, there are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red box.