Description Template
For Microsoft Dynamics 365 / CRM

User Guide

MTC

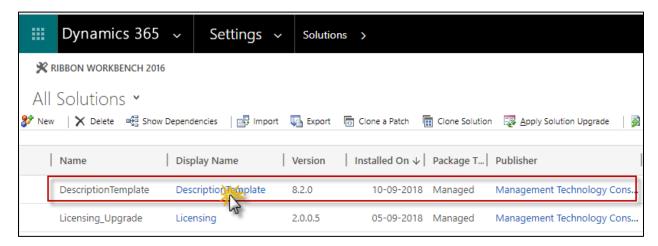THE CRM SERVICES VALUE SOURCE

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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.
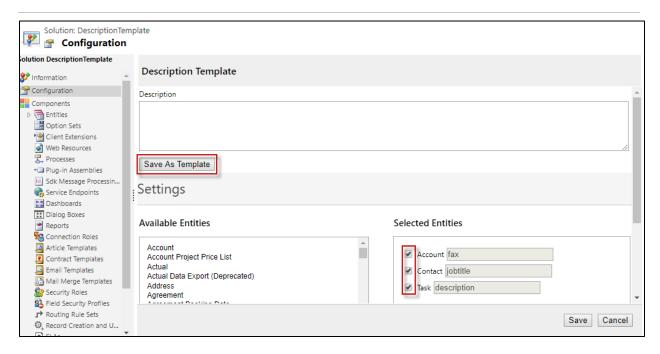
Configuration

1. Go to CRM → Settings→ Solutions.

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.
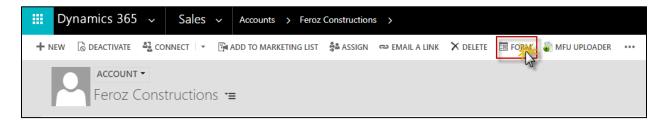
Just below you can see the entities list on the left-hand side column from where you can select the entities of your choice and click the double arrow to see them reflected on the right-hand side column, i.e., **Selected Entities**. In the right-hand side column, you need to tick the check box of that 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**.
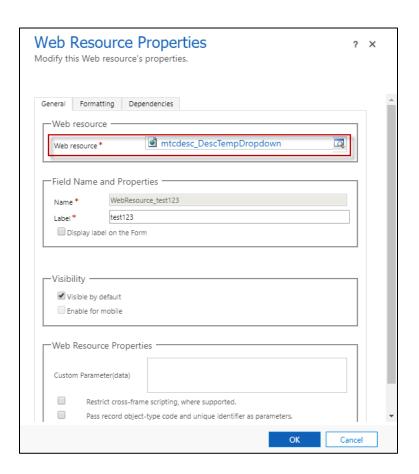
*Note: If you are re-selecting an entity for configuration then the solution will display an alert saying that **the selected entity already exists**.*

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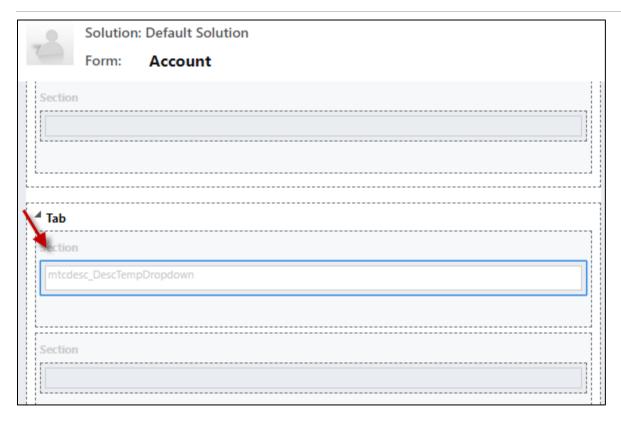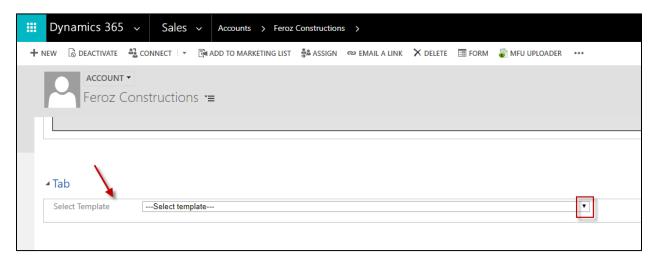
9. Enter Field Name. Label will be the same as Field Name. Click OK. Save and Publish.

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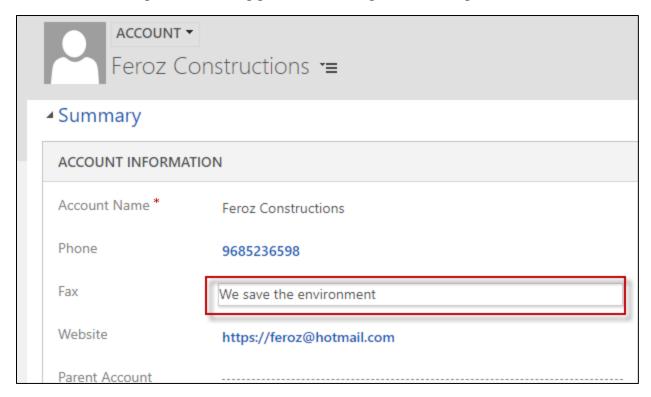
Functionality

Open any Account record.

Select the desired description template from the dropdown.

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.

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.
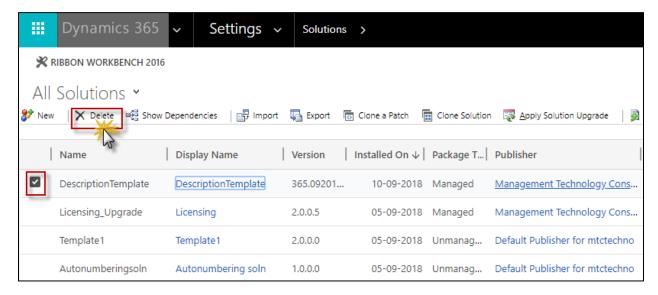
Uninstallation

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

Select the Solution listing and click Delete.

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